



# Send a Document to NetDocuments

Help Guide

Published: 31 January 2025

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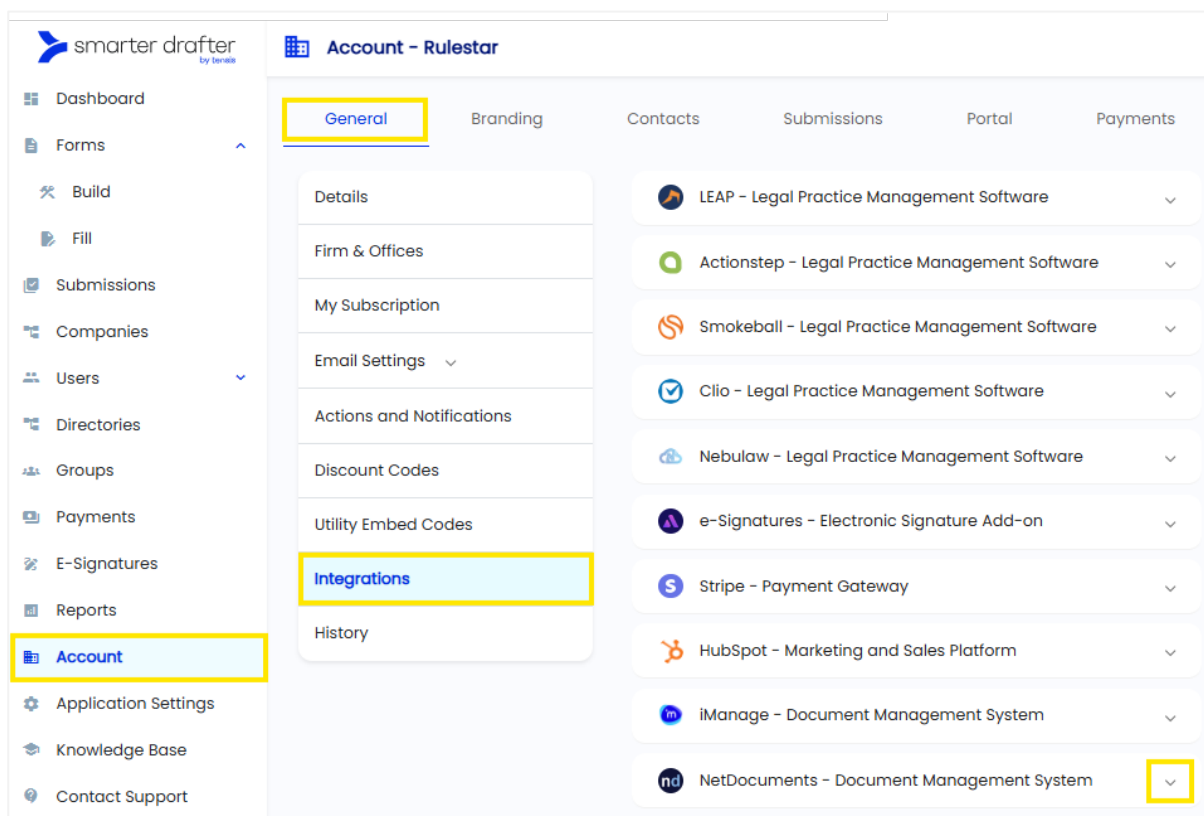
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## 1. Sending Documents to NetDocuments

### 1.1 Enable NetDocuments

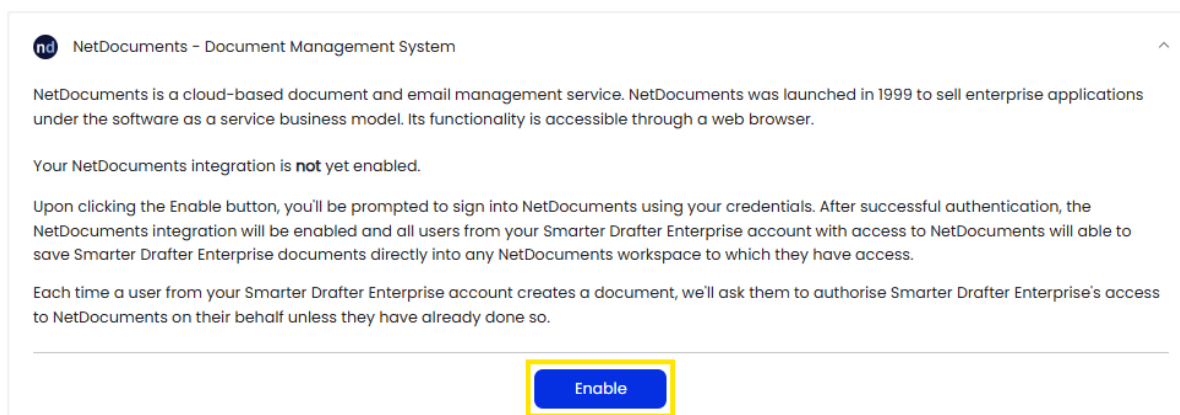
Smarter Drafter integrates with NetDocuments. To use the integration to save documents, start by enabling NetDocuments from the integrations list (you may need assistance from an Admin):

1. Click **Account** in the navigation menu.
2. Under the **General** tab, click **Integrations**.
3. Click the **drop down arrow** on the **NetDocuments** tile.

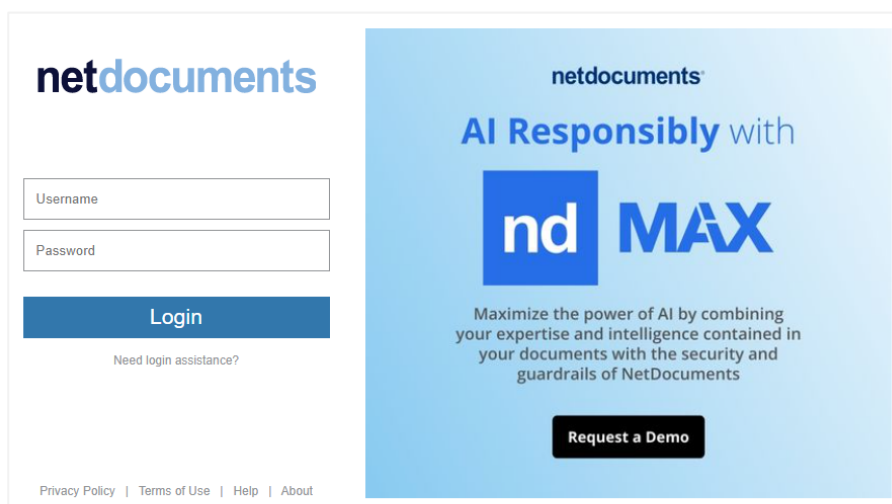


The screenshot shows the Smarter Drafter web interface. On the left is a navigation menu with items like Dashboard, Forms, Submissions, Companies, Users, Directories, Groups, Payments, E-Signatures, Reports, **Account** (highlighted), Application Settings, Knowledge Base, and Contact Support. The main content area is titled 'Account - Rulestar' and has several tabs: General (highlighted), Branding, Contacts, Submissions, Portal, and Payments. Under the 'General' tab, there are sections for Details, Firm & Offices, My Subscription, Email Settings, Actions and Notifications, Discount Codes, Utility Embed Codes, **Integrations** (highlighted), and History. The 'Integrations' section displays a list of connected services: LEAP, Actionstep, Smokeball, Clio, Nebulaw, e-Signatures, Stripe, HubSpot, iManage, and NetDocuments. The 'NetDocuments' entry at the bottom has a dropdown arrow highlighted with a yellow box.

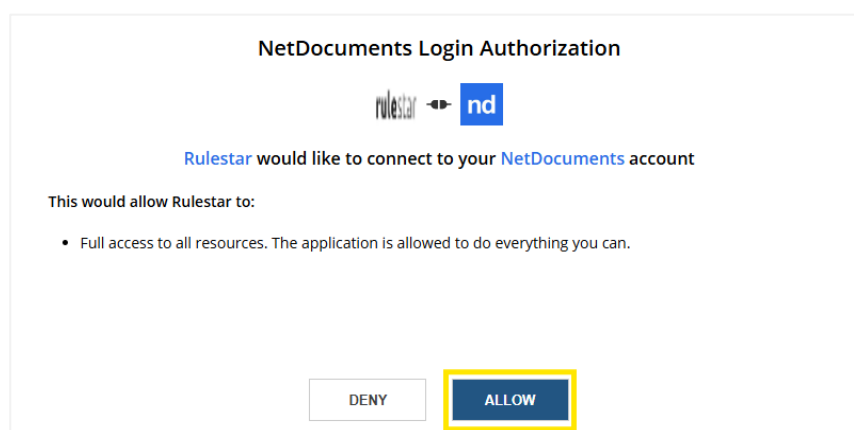
- The integration tile appears. Click the **Enable** button to enable NetDocuments.



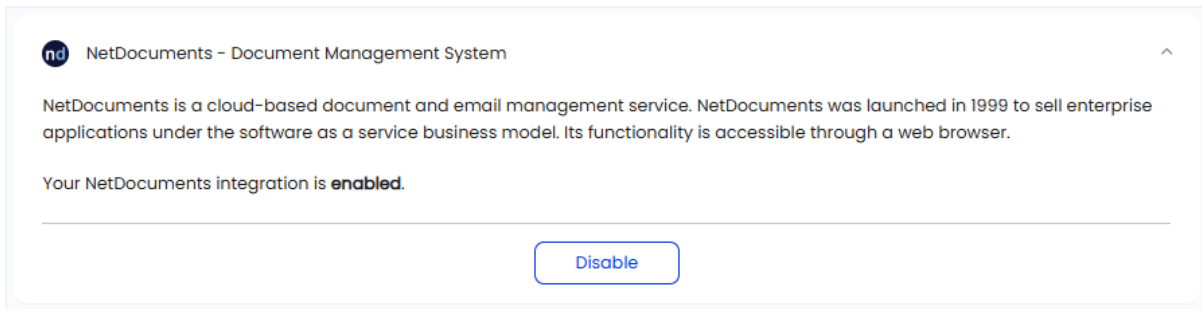
- Use your credentials to log in to NetDocuments in the **pop up window**.



- When you have logged in, the system will connect to NetDocuments. Click **Allow** to proceed.



7. NetDocuments integration is now enabled.



**nd** NetDocuments - Document Management System

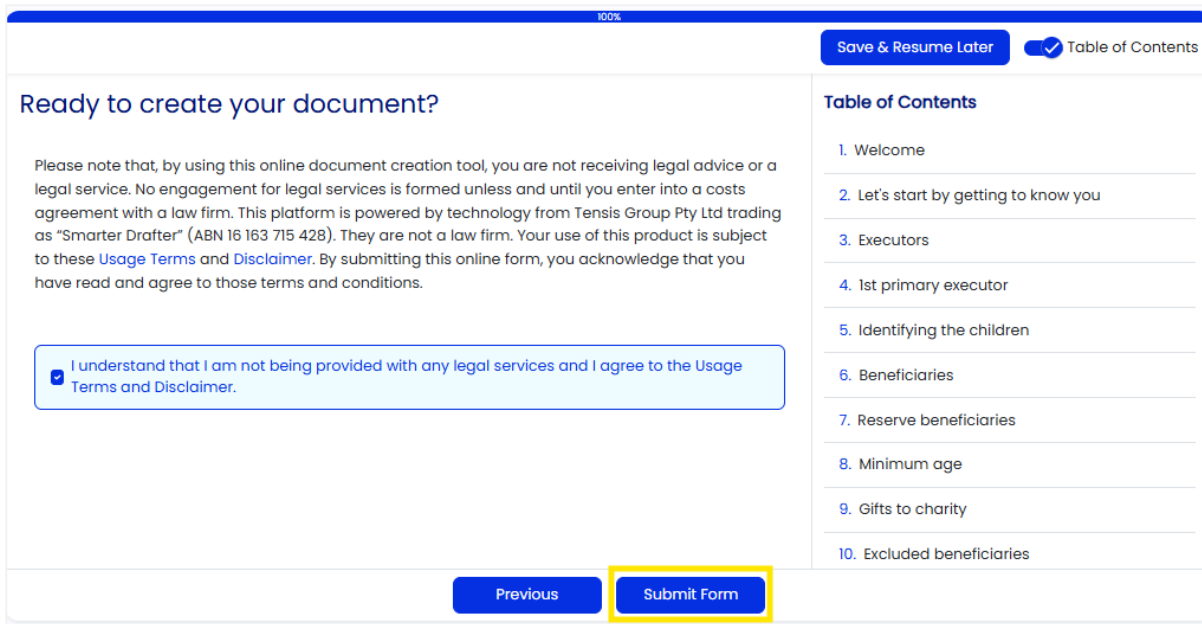
NetDocuments is a cloud-based document and email management service. NetDocuments was launched in 1999 to sell enterprise applications under the software as a service business model. Its functionality is accessible through a web browser.

Your NetDocuments integration is **enabled**.

[Disable](#)

## 1.2 Complete the Required Form

8. When a form is completed, send the form to NetDocuments. Click **Submit Form**.



100%

[Save & Resume Later](#) [✓ Table of Contents](#)

### Ready to create your document?

Please note that, by using this online document creation tool, you are not receiving legal advice or a legal service. No engagement for legal services is formed unless and until you enter into a costs agreement with a law firm. This platform is powered by technology from Tensis Group Pty Ltd trading as "Smarter Drafter" (ABN 16 163 715 428). They are not a law firm. Your use of this product is subject to these [Usage Terms](#) and [Disclaimer](#). By submitting this online form, you acknowledge that you have read and agree to those terms and conditions.

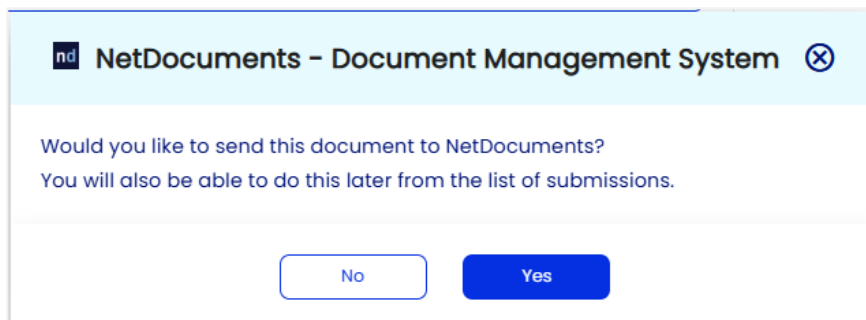
☒ I understand that I am not being provided with any legal services and I agree to the Usage Terms and Disclaimer.

[Previous](#) [Submit Form](#)

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1. Welcome
2. Let's start by getting to know you
3. Executors
4. 1st primary executor
5. Identifying the children
6. Beneficiaries
7. Reserve beneficiaries
8. Minimum age
9. Gifts to charity
10. Excluded beneficiaries

9. The following pop up will appear. Click **Yes** to send the document to NetDocuments.



**nd** NetDocuments - Document Management System

Would you like to send this document to NetDocuments?  
You will also be able to do this later from the list of submissions.

[No](#) [Yes](#)

### 1.3 Send a Submitted Document to NetDocuments

If a form has already been submitted, and you would also like to send it to iManage or NetDocuments or another integrated system, click the **ellipsis** (three vertical dots) to the right of the form in the submission list and select **Send to NetDocuments** (or the preferred system).

Document	Date ↓	Status	Saved or Submitted By	Company
1 x Smarter Will (All to Children)	1 Nov 2024 2:13 PM	Generated		
1 x Smarter Will (All to Children)	1 Nov 2024 2:09 PM	Generated		
1 x Smarter Will (All to Children)	1 Nov 2024 2:05 PM	Generated		
1 x Smarter Will (All to Children)	1 Nov 2024 1:48 PM	Saved		
File upload test	31 Oct 2024 2:41 PM	Started		
1 x Smarter Will (All to Children)	31 Oct 2024 2:41 PM	Started		
1 x Smarter Will (All to Children) - Intake Form	31 Oct 2024 2:41 PM	Started		
1-Page NDA	31 Oct 2024 2:32 PM	Started		
1-Page NDA - Intake Form	31 Oct 2024 2:32 PM	Started		
1 x Smarter Will (All to Children) - Intake Form	31 Oct 2024 2:28 PM	Saved		

Edit Submission  
Resend Email  
Send to Actionstep  
Send to iManage  
**Send to NetDocuments**  
Send to LEAP  
Send to Clio  
Send to Nebulaw  
Delete

1. Click on the **name** of the document to send it.
2. A **green pop-up** will confirm that the document was sent successfully.

NetDocuments Matters

Cabinets

☐ Cabinet Two  
NG-QMPJHD2P
☒ Documents  
NG-UR2SDQ0C
☐ Employment Law  
NG-B2Q4NBEP

Name	Modified By	Last Modified
Client 2 - Mater Two - 002.002		20 Apr 2022 12:55 PM
Client 1 - Matter 1 - 001.001		7 Apr 2022 9:50 AM

Cancel

Document(s) sent successfully