## CORVUM

## SMS – Clio Integration

First, make sure you have integrated your Corvum and Clio accounts. If you have not yet done this step, refer to '<u>Connecting to Clio</u>' guide

You can turn on 'Automatic SMS Posting' by navigating to: Settings > Integrations on the Corvum Portal.

Once you are there, you can toggle on/off the automatic SMS posting.

Clio



Automatic SMS posting @

**Note**: Every time you navigate to this page, your settings take 3-4 seconds to load. Your icon will appear off until it loads.

Your SMS messages will be automatically posted to the 'Communications tab' of your Clio Manage.

Recorded time	Туре	Date and time 🔹		Subject, body and attachment	Matter \$	From	То
© <u>0.01h</u>	C.	03/30/2021	12:17 PM	CORVUM SMS (19:17:37) - Test	_	Nicolas Vecino	Nicolas Vecino (Me)
© <u>0.01h</u>	¢.	03/30/2021	10:32 AM	CORVUM SMS (17:32:45) - Hello there! My name is Luke Scott. I am writing to confirm our meeting	-	<u>Nicolas Vecino (Me)</u>	Nicolas Vecino
0 <u>0.01h</u>	¢.	03/30/2021	10:29 AM	CORVUM SMS (17:29:37) - Hello there! This is your attorney, Mr. Vecino. I am writing to confirm our	_	<u>Nicolas Vecino (Me)</u>	Nicolas Vecino

There you will be able to see the pertinent information regarding each message.

## CORVUM

If you are messaging a contact which is not saved in Clio, we will post the number in the body of the communications log.

Subject

CORVUM SMS: From: +12135451660 (16:39:01)

This is all done automatically. You do not need to manually link each communication to Clio.

The billable time can be adjusted from within Clio, depending on how much you would like to charge on a case-by-case basis.