



## NextChapter's Clio Integration

Clio helps lawyers build a better practice by being a comprehensive, yet easy-to-use cloud-based law practice management software. Together with Clio, we make it easy to manage bankruptcy matters, contacts and more.

Even the most dedicated bankruptcy attorney can benefit from a smoother intake and organizational process to address client needs. Remaining focused and organized is crucial for bankruptcy practice. Expedite and simplify your bankruptcy preparation process with NextChapter for Clio.

### Why use Clio with NextChapter?



**Clio + NextChapter**  
**A match made in heaven.**

<https://nextchapterbk.com/cliio>



- **Efficient Client Intake:** Effortlessly collect client and case information during onboarding. Easily integrate your Clio matters with NextChapter to start a case with more information filled out.

- **Better Organization:** Updates made in one program will be automatically updated in the other.
- **Keep Everything on the Cloud:** With Clio and NextChapter you have the freedom to work on any computer or tablet and from any browser.

## Connecting Clio to NextChapter:

1. Get started by going to the Clio Integration section in the firm's setting page of NextChapter and click on the start button.

The screenshot displays the NextChapter user interface. At the top left, the logo reads "NextChapter® testing". On the top right, there are navigation links: "Home", "Settings" (highlighted with a black box), "Help", and "Log Out". Below the navigation bar is a header section titled "Attorney's Firm". On the left side, there is a vertical menu with various settings options: "My Firm", "My User Profile", "User Accounts", "Billing", "Credit Report Integration", "Exemptions", "Common Creditors", "Monthly Goals", "Default Tasks", "Default Document Checklist", "Default Fee Categories", "Attorney Fee Disclosure", and "Clio Integration" (highlighted with a black box). The main content area is titled "Clio Integration" and features a section for "NextChapter + Clio". This section contains a paragraph of text: "Clio helps lawyers build a better practice by being a comprehensive, yet easy-to-use cloud-based law practice management software. Together with Clio, we make it easy to manage bankruptcy matters, contacts and more. Connect with Clio in just a few short steps. To get started, click the button below." Below this text is a prominent orange button labeled "Start Clio Integration" (highlighted with a black box).

2. On the "Connect with Clio" screen, click the green "Yes, Let's Connect" button. If you are not already logged in to your Clio account, you will be prompted to log in before you can connect.

3. Back on the "Clio Integration" screen, you can select what data you would like to be synced between Clio and NextChapter. NextChapter syncs the data you've selected with Clio every 10 - 15 minutes. NextChapter will notify you when the next sync is completed.

### Clio Integration

#### What data will be synced?

After the Clio Integration has been initiated through NextChapter and your data has been synced, the hard work is done. All Matters and Contacts marked as Bankruptcy in Clio will now be kept in sync both ways between the two applications. Soon, you will be able to sync Events and Tasks as well. NextChapter syncs data with Clio periodically every 10 - 15 minutes. We will notify you when the next sync is completed.

- Contacts and Bankruptcy Matters
- Events
- Tasks

[Sync with Clio](#)

Once your cases are connected, they will automatically sync back and forth between Clio and NextChapter to make sure the most up-to-date information is in both systems.

If you have any problems with Clio Sync or questions, please contact

[support@nextchapterbk.com](mailto:support@nextchapterbk.com).