# Clio This Month: Trust Disbursements, Faster Search, and Document Automation

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To ensure the best experience for our users, we're improving Clio all the time. From tiny tweaks to big additions, we're constantly adding ways for lawyers, paralegals, and administrators to simplify their workflows.

However, unless you're paying very close attention, it's hard to keep track of all the new tools constantly coming online. Worse, you might be missing out on tools you need that already exist within Clio.

That's why we're launching monthly product updates on the Clio blog.

Each month, you can expect a post that contains recent updates to Clio (and why these updates matter for your firm), as well as carefully curated tips on how to get the most out of existing features in Clio. In other words, it's a short update from us to make sure you've got the tools to manage your practice in the most efficient way possible.

Here's what's new from Clio this month:

## Trust disbursements made easy

To make your trust accounting more robust, we've added a new Disburse Funds button to Clio. This lets you easily record any disbursement from a trust account with a single click.

Lawyers have a duty to maintain clear and concise records of disbursements. However, keeping track of trust funds disbursed back to clients or third parties can be a cumbersome process for any legal professional.

With the new Disburse Funds button in Clio, you can simply click to add information about a given trust fund disbursement:

Add in all relevant information, click "Disburse Funds," and a negative entry will show in your trust accounting ledger. Just like that, your records will be up to date.

*Want to learn more? Check out our support article on Disbursing Trust Funds*

Learn more

# Faster search in iOS—with better results

Being a lawyer isn't a nine-to-five job. We know that. You need to able to serve your client at any time, from any place—and you can never be caught off-guard without the right information.

So, we've improved the search functionality of our iOS app to make it faster.

This means you'll be able to retrieve matters, contacts, and other client information as quickly as you need to.

*Leave the office a little earlier today and take your practice with you. Download our Clio iOS or Android apps and discover mobility.*

Download iOS app now Download Android app now

# Tip: Document automation in five minutes

When you're working on a tight deadline, you don't have time to painstakingly bold every title in your document or fiddle with mysterious formatting inconsistencies.

There's a way to make the process less stressful. Clio's advanced document automation capabilities can help you streamline document creation while decreasing the risk of human error—leaving you more time to spend on billable work. Learn how it works today in just five minutes by watching this video.

There are more ways to manage your firm better with Clio all the time. Stay up to date with future updates to Clio by checking out our Announcements & Product Updates page, following us on Twitter, or perusing our support articles for tips and tricks to streamline billing, time tracking, and more.

*How do you want to find out about new features in Clio? Tell us in the comments below.*

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## About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the

people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.