Clio This Month: Custom Fields Tab and Gmail Time Entries

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Summer is here, and we've got plenty of updates at Clio to help you manage your law firm more efficiently so that you can spend a tiny bit more time in the sun.

This month, we've introduced a new Custom Fields tab, relaunched our integration with cash flow helper Fundbox, and added the ability to view documents to the new mobile app beta for Clio Manage. Finally, there's an exciting new addition to the Clio Gmail add-on that lets you add time entries right from your inbox!

Keep track of Custom Fields with the Custom Fields tab

As a legal professional, you've got a lot to keep track of. Custom Fields in Clio Manage help you ensure there's consistency across the most important types of information you need for your cases. You can add an SSN field to your immigration cases, a spouse name field for divorce cases, or an incident date field for personal injury claims.

The new Custom Fields tab is designed to help you organize your custom fields, making information easier to find. You can navigate to the tab from any matter or contact in Clio.

The Custom Fields tab helps reduce room for human error when creating a new matter or Contact, by ensuring all Custom Fields are added—instead of clicking one by one on individual fields, add a Custom Field set to have your individual fields appear neat and tidy. You can also organize your individual fields into the categories that make sense for the type of cases you're working on, so that fields are easier to find.

In addition to the new tab, we've made a few other changes to make it easier to view Custom Fields. You can now see Custom Field sets in their groups on the edit page of a matter or contact, instead of simply a list of single fields. Additionally, you'll be able to see the first 12 relevant Custom Fields right from the dashboard of a matter or contact, and you can access the rest via a "view more" button at the bottom of the list.

Learn more about Custom Fields in Clio.

View documents in Clio's mobile app beta

This month brings one of the most highly-requested features to Clio's mobile app beta: Documents! You can now view your existing documents from Clio's mobile app beta.

The mobile app beta gives Clio Manage users first access to a newly redesigned mobile app. When you sign up for the mobile app beta, you'll get early access to the new mobile features and performance enhancements. You'll also be among the first to try the new interface to the app before it's released later this year.

Sign up for Clio's mobile app beta here.

Create time entries as you go

When you're working hard on a case, tracking time for certain tasks can be tedious—which means some time inevitably goes unlogged (and unbilled), eating away at your revenues.

Clio's updated Gmail Add-on lets you create time entries right from your email, streamlining the process of time tracking. The updated add-on also gives you the ability to set up standardized categories and durations for common tasks (for example, you may choose to bill a standard of 15 minutes for an email), so it's faster and easier to add time entries as you log emails from Gmail to Clio.

This update to Clio's Gmail Add-on goes hand-in-hand with a number of other recent improvements, including:

- Saving all attachments from a message or thread to Clio
- Showing which emails in a thread have been logged to Clio
- Several bug fixes

Still using Clio's Chrome Extension? Clio's Chrome Extension will soon be replaced by Clio's Gmail Add-On—click here to switch today.

Clio's Fundbox integration: Relaunched

For lawyers, getting paid on time can be a struggle—and when this causes cash flow issues, late payments can spell trouble for your firm.

With our relaunched integration, Fundbox can now help you finance invoices or apply for a line of credit to cover cash flow gaps—right from your Clio account! With quick credit decisions and limits up to $100,000, Fundbox gives law firms a seamless way to manage

inconsistent payment periods.

With this seamless funding, you can keep your business running smoothly between sending an invoice and receiving payment. Get started today to ease the stress of waiting to get paid and get the confidence to take on more opportunities for your firm.

Sign up by August 15 to receive $100 off your interest payments.*

That's it for this month! Stay tuned for more news and updates from Clio this July.

**Customers must be approved to gain access to Fundbox credit. $100 will be applied to your account if approved for Fundbox credit before August 15, 2019. Coupon expires 90 days after registration.*

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.