Clio This Month: Enhanced Mobile Documents and Over 150 Clio Integrations

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We're officially more than halfway through 2019 (Where did the time go?), which means it's the perfect time to find new ways to help your firm perform its best straight through the end of the year—and Clio is here to help.

This month, we're bringing you ideas for how to streamline, modernize, and make things easier for your firm. From even more functionality for the Documents feature in the Clio law firm mobile app beta to highlights from our now over 150 apps in the Clio App Directory, read on for fresh ideas from Clio this month.

Enhanced Documents functionality in the Clio Mobile Beta

This month, the highly-requested Documents feature for the Clio Mobile Beta just keeps getting better. Now, we're unveiling new functionality designed to give you even more access to the documents you need, on the go.

Now, in addition to being able to view existing documents, Clio's mobile app beta users can also use Documents to:

- **View a full-screen preview of their documents.** This full-screen preview includes a landscape option. Bonus? The landscape preview option looks great on tablets.
- **Share or open documents with other apps on their phone.** The process is simple via the share menu in the Clio app.
- **Save or upload documents from other apps on their phone.** By using the share menu in the other app, users can easily save or upload documents to Clio. For example, a file in an email attachment can be uploaded to Clio via the "share" function on your phone.

Can't wait to give the Documents features a try? There's still time to sign up for the Clio mobile app beta and get early access to the new mobile features (like Documents) and performance enhancements that can help your practice run more smoothly. When you sign up, you'll also have the opportunity to share your feedback, request features, and be among the first to try the brand-new Clio Mobile app interface before it's released later this year.

Want to know what's coming up next for the mobile app beta? The team is currently working on the next release, which will bring a long-awaited new feature to the app. Need a hint? Let's just say that the team is up to the... Tasks. Additionally, Clio Grow also supports using customized legal document templates and legal document formats.

Sign up for Clio's mobile beta here.

Over 150 apps in the Clio App Directory

There are now over 150 apps included in the Clio App Directory! From email, to accounting, to legal research, it's now easier than ever to connect Clio to your essential business tools and expand Clio with tools specific to your firm needs.

Here's a selection of some of the most popular legal software integrations among Clio customers:

Outlook 365 Add-in and Gmail Add-on

Whether you use Outlook 365 or Gmail, you can quickly and easily file your emails to Clio Manage to keep communications organized for every case. You can also save attachments and documents, and even log billable time directly from your inbox.

QuickBooks Online

With Clio Manage and QuickBooks Online you can quickly and easily sync contacts, bills, and transactions from your practice management software to your cloud-based accounting platform. All your financial data is one one place, eliminating time-consuming duplicate data entry and mitigating risk of error.

Ruby Receptionists

Ruby Receptionists provides live, virtual receptionist services, so that no call from a client goes unanswered. Every call, voicemail, and message you receive via Ruby's live receptionists automatically syncs with your Clio Grow Lead Inbox, making tracking and follow-up a breeze while ensuring no potential business slips through the cracks.

Fastcase

When you integrate Fastcase with Clio Manage, you can easily save research entries directly from Fastcase to the appropriate matter in Clio, keeping cases organized in one central, secure repository. You can also create Clio time entries directly from Fastcase,

ensuring billable work doesn't go untracked.

Find integrations for your firm in the Clio App Directory.

How law firms are using Clio Grow to grow their practices

In the six months since we've launched Clio Grow, Clio's client intake and legal CRM software, we've heard from plenty of lawyers about how they're using this new platform to grow their client bases and run profitable practices.

From making intake more efficient, to driving more reviews, to ensuring no leads fall through the cracks, here are just a few examples:

"Our intake process has also improved dramatically after adopting Clio Grow."

- Elizabeth Cary, Chartier & Nyamfukudza, P.L.C.

"Our enhanced client experience using Clio Grow not only leads to spectacular client reviews but enhances the reputation of our firm and our individual lawyers."

- Maura Greene, Law Office of Maura Greene

"By harnessing the power of Clio Grow, we are able to give more individual attention to every lead and follow up with potential clients in an amiable and effective manner."

- Joshua Valentine, Caulder & Valentine Law Firm, PLLC

Here's how Marirose Roach, Managing Partner of Roach Leite uses Clio Grow to manage prospective clients and ensure that all important pieces of the intake process take place before a client becomes a client:

Want to learn how you can use Clio Grow to streamline your intake process and help grow your firm like Roach Leite and the other firms above? Contact us today, and our team of experts will get you started.

That's it for this month's Clio highlights! Enjoy the summer weather, and check back in with us next month for more updates.

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.