Clio This Month: New Mobile App Features, Enhanced Expenses, and More

Written by Teresa Matich

These days, it seems like everyone's on a mission to declutter and spark some simplicity (a.k.a. joy) in their hectic days.

At Clio, we're simplifying life for lawyers, too. This month, we're bringing you plenty of new ways to tackle your day-to-day tasks faster, easier, and smarter. Read below to learn about improved productivity in the upcoming release of our new mobile app, how enhanced expenses helps you cut down on data entry, and how instant payment notifications let you know when money's coming in.

New app features = better productivity

The new mobile app beta for Clio Manage is in full swing, with the team adding more and more features to help you be more productive while on the go.

Here's what's new:

- Note-taking. Take notes and save them to a matter in Clio.
- Easier matter management. Review, filter, add to, and update the activities, events, and notes related to a given matter from the Matter's screen.
- Text snippets. Enter shorthand abbreviations instead of commonly used phrases.
- Calendar day view. Easily see gaps and conflicts in your daily schedule.

Want in on the Clio mobile beta? It's not too late, and there are plenty of perks, including:

- Access to new Mobile features and performance enhancements
- Access to a brand-new interface
- The opportunity to share your feedback and feature requests

Sign up for Clio's mobile beta here.

Cut down on data entry with enhanced expenses

One of the biggest time drains (and opportunities for error) for lawyers is data entry, especially when it comes to expenses. Clio's new enhanced expense functionality streamlines your firm's recordkeeping workflows by cutting down on data entry and eliminating manual expense calculations—helping you save time while reducing the likelihood of slip-ups.

Available for Clio Manage users on Boutique and Elite plans, enhanced expense functionality gives you the ability to:

- Preset expense categories and rate for each type of expense recovery entered.
- Distinguish between types of expense recoveries:
  - Hard costs paid on behalf of a client to a third-party vendor (like court filing fees, translators, or medical records)
  - Soft costs that are not directly related to a payment for a third-party vendor (such as photocopies or postage)
- Rate and quantity fields with automatic calculations:
  - Automatically calculate expense totals based on rates and quantity inputs
  - Find expense breakdowns on Clio Manage's Activities Table, as well as on invoices
- Choose a contact as a third-party vendor via a vendor field for hard costs.
- Explore new fields on the Activities table:
  - Hard, soft, and generic expenses
  - Expense category
  - Rate

Learn more about enhanced expenses in Clio Manage here.

Get real-time, instant payment notifications

It's a lot easier to stay on top of your firm's finances if you know exactly what money is coming into your accounts—and when.

Now, whenever a client makes a payment, Clio Payments will send a notification to both your law firm and the client. The notification is sent instantly—before the funds are deposited into the firm's bank account (the funds will then be reflected in the firm's bank within one-to-two business days).

With instant, real-time payment notifications, you'll increase your firm's visibility into client receivable balances—which in turn makes it easier for you to provide more responsive customer service.

A little bonus? These notifications follow the same customization as the bill share emails and Clio Connect branding experience, which means your firm can customize the look of their Clio Payment notifications with your firm's name and logo.

Learn more about Clio Payment notifications here.

That's all for this month! Stand by for more exciting updates as we head into summer.

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.