Clio This Month: A New Mobile App Experience

Written by Sharon Miki

The holiday season may be right around the corner, but that doesn't mean it's time to slow down—especially when there are so many new ways for your firm to grow and thrive.

From the news you've been waiting for (hint: The new Clio Mobile App is here, and you're going to love it), to faster collections with Outstanding Balances, to a more precise way to track, organize, and sync your firm's finances—the focus this month is on finding ways to help your firm be its most efficient.

Ready to hear about what's new at Clio this month? Read on for the latest.

The new Clio Mobile App has arrived

You asked, we listened—and now it's here. With more than 30 fresh features, thenew Clio Mobile App is the most focused legal app for law firms—letting you accomplish more when you're on the go.

What's new

The rebuilt Clio app offers a refreshed mobile experience, with a focus on the actions legal professionals take when they're away from their desks.

The result? A mobile app that's more functional, and more responsive than ever—giving you:

- **Quicker access to the information you need.** You can choose, for example, to have the app's home screen be Contact *or* Matter-centric.
- **Enhanced productivity and profitability.** New quick actions—like the ability to duplicate activities with a swipe—save time.
- **Better performance and reliability.** Newer technology allows for significant improvements—especially for firms with large datasets.

What customers are saying

Clio customers are already appreciating the difference:

"The new app is a drastic change for Clio. It's improved our workflow and reduced our need to always having a laptop with us during our daily court appearances." – Christopher Meikle, Meikle West LLC

Want to try the new Clio Mobile App? It's available for download now, on iOS and Android.

Updated Clio Manage + QuickBooks Online integration

When it comes to your firm's finances, there's no room for error and no time to waste. Luckily, with Clio Manage's QuickBooks Online (QBO) integration, the good is getting even better—and more efficient.

Thanks to a series of improvements to our Clio Manage + QuickBooks Online integration for Boutique and Elite plans, you can now track, organize, and sync your firm's financial workflows from Clio Manage to QuickBooks Online faster, and with more precision—removing manual data entry, reducing the risk of error, and helping you save time.

The integration's new features help your firm:

- **Track your firm's users, understand staff performance, and determine compensation.** The improved integration lets you link staff names to billable hours in your Clio Manage time entries, and then export to QuickBooks Online. You can also now filter by firm members and generate detailed reports in QuickBooks Online.
- **Easily create and organize invoices.** By setting invoice prefixes in Clio Manage that are easily identifiable in QuickBooks Online, you can stay better organized. This also ensures your financial information is accurate across both tools.
- **Simplify expense creation.** In just a few clicks, you can now capture hard costs in QuickBooks Online, and then sync them back to Clio Manage. This eliminates manual data entry, saves time, and maintains accurate recordkeeping.

For more, watch this video explaining the Clio Manage + QuickBooks Online integration, and read about the latest improvements here.

2019 Launch//Code contest winner: Casetext

Clio's $100,000 Launch//Code contest took place once again at this year's ClioCon, and showcased a range of innovative legal technology solutions from five finalists.

This year, Clio's Launch//Code contest to find the best new integration for Clio in 2019 received over 60 submissions—including the five outstanding finalists who were selected to present as part of the Live Pitch portion of the contest:

- Casetext
- Community.lawyer
- firmTRAK
- Heymarket
- WiseTime

The choice wasn't easy, but our panel of expert judges chose **Casetext.** Casetext's smarter legal research platform helps attorneys find better results, in less time, for less money. With Casetext's CARA A.I. technology, you can use a brief or complaint from one of your matters in Clio to find highly relevant, tailored search results.

Want more? Visit Clio's App directory to learn more about Casetext and our nearly 200 other integrations.

Time to check in on Outstanding Balances?

Is your firm collecting all that they can—and should be?

According to the *2018 Legal Trends Report*, 15% of hours on an invoice are not collected on, which means your firm is losing earned revenue.

Earlier this year, we told you about the launch of Clio Manage's Outstanding Balances functionality—and how it can help law firms to get paid faster, and quickly improve realization and collection rates.

With our new Outstanding Balances features, you can:

Simplify your billing workflows

Outstanding balances are all in one place—which makes viewing, sharing, tracking, and managing client outstanding balances easier.

Save time

When you eliminate manual billing work, you gain back the time you'd lose tracking and sending invoices.

Get paid faster

Sending prompt and consistent bill reminders—outlining what's owed and when—makes payments simpler and quicker for clients. And, by allowing clients to pay online instantly with credit card, via a secured payment link, you get paid faster.

Deliver exceptional client service

Firm-branded payment reminder emails—complete with a detailed breakdown of client invoices and their outstanding amounts—keeps things clear for clients, while providing a more professional client experience.

Cut the confusion

A single dashboard lets you understand which clients owe what, in an instant.

But what do our customers think?

"The first time I used Clio Manage's Outstanding Balance feature, I got paid within 10 minutes. One of the main benefits of Outstanding Balances is that it allows us to share gentle payment reminders with clients, in just one click. I really like how I'm able to send multiple different invoices in one email, without spamming a client's inbox. Now I can see at-a-glance, who owes what and whether I need to take a different action." – Lori Gonzalez, CEO, The RayNa Corp

Ready to get paid faster? Learn more here, and try Clio Manage's Outstanding Balances today.

That wraps up what's new at Clio this month! Check back next month as we round out 2019.

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.