Clio This Month: Outstanding Balances and Document Upload Notifications

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As the sun sets on another productive summer, it's time to pull on a sweater and get excited for what's in store for fall.

This month—because it's true that what's good can always get better—the focus is on enriching the features that you told us are most important to you.

From simplifying your billing (while also improving your client experience) with Outstanding Balances, to time-saving document-upload notifications in Clio Connect, we've got key improvements to make your Clio experience even better. Plus, you'll get a sneak peek at our new accessible email attachments feature, which will further streamline the way you work with emails in Clio.

This month is also your last chance to share your feedback on the next big thing to come to Clio Manage: the new mobile app.

Read on for the latest ways to help your firm become more productive and efficient with Clio This Month.

Easier billing with Outstanding Balances

Clio Manage's Billing functionally already makes your law firm's billing faster and more efficient, and now it's getting even better.

The new Outstanding Balances feature (located within the main Billing tab of Clio Manage) presents client outstanding balance information in one central place—so you can:

- **Simplify billing workflows.** With client outstanding balance information in one location, you'll eliminate tedious invoicing tasks and reduce the risk of error. View, share, and manage client outstanding balances quickly and easily, while also tracking the status of multiple outstanding invoices.
- **Save time.** Cut out time-consuming manual billing work, and spend less time tracking and sending monthly invoices.
- **Cut the confusion.** Know who owes what in an instant. A single dashboard lets you see which clients owe your firm money in a glance, and you can notify clients with outstanding balances in a few simple clicks.

Outstanding Balances features don't just make things easier for you and your firm—they can also help make dealing with outstanding amounts simpler and more straightforward for clients (which helps you deliver a more positive client experience). Clients will:

- **Know what they owe.** They'll receive professional, firm-branded payment reminder emails that include a detailed breakdown of client invoices and their outstanding amounts.
- **Pay with ease.** Clients are able to pay outstanding balances online instantly with credit card, via a secured payment link.

Learn more about the Outstanding Balances in Clio Manage.

Know when a document is shared with you

As an attorney, chances are that you're perpetually waiting on an important document (or a few), and that you spend many precious minutes anxiously checking and rechecking folders for new uploads—minutes that add up over time and erode your productivity.

Clio Connect, our secure portal, has already made it easier to share resources with your clients or co-counsel—and now it's saving you time with a document upload notification feature.

Now, when you enable Clio Connect's new document upload notifications, you'll get an email notification the instant a document is shared with you—eliminating the need to manually check back and forth for updates.

Note: In order to receive Clio Connect document upload notifications, you will need to enable the setting in your Clio Manage account.

Learn more about Clio Connect notifications—and how to enable them in your account.

Coming soon: Accessible email attachments

Most lawyers are wading in a virtual mass of documents with attorneys, on average, creating and receiving more than 70 documents every day (and for some, many more). That's more than 26,000 documents a year!

With many of these documents being somewhere in your email—think hard-to-find emails, email attachments, client communications, and opposing counsel records—it can be difficult and time-consuming to search for documents across your inbox and your practice management provider.

Wouldn't it be nice to quickly find the records and email attachments you need in less time, fewer clicks, and in one central location—Clio Manage—so you can get on to the next task at hand?

We hear you!

Soon, you'll be able to say goodbye to digging around in different folders in Clio Manage to find the records you need. We're making email attachments more accessible by saving them to email logs and placing them in your Communications list so you can cut down on time, clicks, and confusion. Once you save an email to Clio Manage via Mail Drop, Outlook, or Gmail, you can:

- See the number of attachments associated with each email log.
- When clicking into an email log, see a list of all linked attachments from the main modal.
- Edit attachments with ease from the email log modal with Clio Launcher—you'll be glad you installed it.
- Download the attachment you need with a click from the email log modal.

Watch this space for more updates, or let us know if you'd like to be the first to try out this feature.

Clio Mobile Beta: Last Chance

If you haven't signed up for the Clio Mobile Beta yet, the time has come: Now's your last chance to experience the mobile app beta's:

- New mobile features,
- Performance enhancements,
- And a brand-new interface.

Sign up now for early access to the app, and you'll also have the opportunity to share your feedback to help create the best possible tool.

Sign up for access to Clio's Mobile Beta here.

That's what's new this month from Clio! Come back next month for more updates—and we hope to see you at ClioCon in October!

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.