Clio This Month: New QuickBooks Online Trust Sync

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Summer is almost over, but the excitement is just starting to ramp up at Clio. We've got big changes coming up, and we're announcing a few of the first ones here: The ability to sync trust transaction information from Clio to QuickBooks Online, and our new and improved Android App.

New Clio QuickBooks Online Trust Sync

As a lawyer, you need to stay compliant when it comes to trust accounting. We think that should be easy. That's why our developers have worked long and hard with the accounting experts at QuickBooks Online to make it possible to sync trust transaction information from Clio to QuickBooks Online.

A fully automated trust workflow means that you can sync any retainer top-ups or bill payments involving trust between both tools, instantly removing the need for double entry and the risk of error.

Rest easy. When it comes to trust accounting compliance, we've got you covered.

Updated Android App

After over 100 hours of interviews with the people who use Clio and 60-plus prototypes, legal professionals can now access the most robust app for lawyers available on Android. Our goal was to work closely with lawyers to produce a mobile app that truly helps them complete tasks more quickly while on the go.

In the mobile era, lawyers need to take action faster. With Clio's new Android app, you'll see more billable tasks completed, with minimal taps required.

Here's what's new:

Global Create

With the new Global Create button, you can easily create a new record from anywhere in the Android app. When you're on the go, you need to keep your firm organized without getting bogged down by data entry. Global Create lets you enter new information quickly and efficiently, so you can rest easy knowing that your cases are up to date.

One tap of this button from any screen lets you create matters, contacts, documents, secure messages, time entries, tasks, calendar events, expenses or notes. When your desired action is complete, you'll be instantly directed back to your original screen.

Tab bar navigation

Within an app, a hidden navigation menu means more clicks. Clio's new bottom navigation bar in the Clio Android app puts what you need front and center, so you won't be stuck clicking around to get what you need.

Access your Calendar, Matters, Time entries and home screen with just one click from wherever you are in the app. You can also use the "more" button to reveal other options if you're looking for something else.

If you're an Android user and you don't have Clio's app yet, you're missing out! Download Clio's Android app for free.

Download Clio App

Note: Using iOS? Global Create and our new navigation are available to you too. Download Clio's iOS app for free.

Integration Partner: PieSync

When a client or contact moves to a new address or gets a new phone number, where do you need to update that information? If the answer is "more than one place," then you need PieSync.

PieSync automatically syncs your contacts between Clio and your most-used apps, so that you'll never be stuck entering contact information in more than one place again. Every time you add or update a contact in Clio, it will automatically be reflected as a contact in your other app.

See how PieSync works with Clio to keep your contacts' information consistent across all of the tools you use.

Learn about PieSync

Tip: Sync Your Documents to Clio With AlphaDrive

AlphaDrive for Clio is a plugin that lets you create a local folder that syncs to Clio Documents. When you update a document in AlphaDrive, it automatically syncs to Clio—no need to download and upload new versions of documents when editing.

Watch the video below to see how it works:

Want to see it in action? Start your free 10-day trial of AlphaDrive with your Clio account*.

*Currently *available for PC only. Mac version in beta, and coming soon.*

What Clio users are saying about us:

> "Clio enabled me to start my firm when I thought it would be impossible."

– Stephany Eckart, Modern Law

> "It's a very intuitive tool. You can set up a matter for a new client in seconds. You can get all your bills out in ten minutes."

– Chris Trebatoski, Treblaw LLC

Want to see how Chris grew his revenues by 91% in three years with Clio? Watch his story.

Watch Chris's story

DISCLAIMER: AlphaDrive for Clio is not currently available for our users in Europe. We hope to make it available soon.

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.