Innovative, Efficiency-Boosting Features in Clio: Outlook Add-in, UK Court Forms Integration, and More

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Enabling legal professionals to run their firm and practice the law as efficiently as possible is core to our work at Clio. We're pleased to introduce you to a number of exciting features and integrations that will make running your firm even more efficient.

Easier Email and Document Management

Keeping relevant emails and documents organised and easily accessible can be one of the most challenging parts of law firm operations. With Clio, you can file emails and documents as you work to stay on top of your inbox.

Outlook Add-In

File and organise emails in seconds with our Outlook Add-in.

Make staying organised and logging your effort a breeze and never miss a billable moment. Using our our Outlook Add-in, you can file and organise emails and track time to your matters in Clio Manage directly from Outlook.

Learn More.

Clio Drive

Manage your client and matter documents right from your desktop with Clio Drive.

Access, edit, and collaborate on files from the familiarity of your desktop. Clio Drive syncs your documents between a virtual drive on your desktop and Clio Manage, making it easier to find and work with your files while keeping everything and everyone in sync.

Clio Drive is available for both Windows and Mac.

Learn More.

Legal Client Communication

Communicating securely with your clients while still ensuring that you're doing so in a personalised and trustworthy manner is essential for law firms. With these features from Clio, you can deliver an even better client experience.

Email Personalisation

Improve communications and deliverability by sharing bills, calendar events, tasks, and more from your own email address.

Make it easy for clients and colleagues to recognise emails from Clio Manage by using your own email address. You can collect on bills sooner, improve the client communication experience, and get notified the moment an email is blocked or bounced—all while working out of your own inbox.

Learn More.

Clio for Clients Client Portal Events

Send secure messages to clients through Clio's secure client portal, Clio for Clients, and know when they receive your message or open share documents.

With Clio for clients, Clio's client portal, you can communicate easily and securely with your clients. With Clio for Clients Client Portal Events, you can now verify that clients have received a message or opened a document that was shared with them via the client portal. To see what actions your clients have taken, and at what date and time, toggle on Show all client portal events at the top of the message thread within a client portal. Client portal events are visible only to users that have access to a client portal in Clio Manage; they are not visible to your clients.

Learn More.

Faster Form-Filling with FormEvo (UK)

Take the hassle out of creating documents and court forms with Clio's UK forms integration with FormEvo.

FormEvo Integration for Clio

Generate forms fast with access to an extensive library of templates and autofill details using fields from Clio Manage.

The FormEvo integration for Clio lets you quickly create and fill forms with access to FormEvo's industry-leading database of forms for lawyers practising in England, Scotland, and Wales. Once you've selected your form, details can then be autofilled using client and matter details stored in Clio Manage. With the FormEvo-Clio integration, you can generate and auto-complete forms fast with access to an extensive library of over 2,000 legal forms, ranging from Law Society bundles to conveyancing, family, commercial, and Legal Aid forms.

Learn More.

Legal Aid Features (England and Wales)

Clio is continuing its work to make legal aid work quicker and more efficient for busy legal aid practitioners in England and Wales. Here are two features of our legal aid practice management solution we think you'll like.

Legal Aid on Mobile

Serve legal aid clients (in England and Wales) whilst on the go with Clio's legal aid on mobile capabilities and more.

It's now even easier to meet with and work with legal aid clients, thanks to Clio's mobile capabilities. Manage cases, record important details, and track legal aid work on the go, via the Clio Mobile App for Lawyers.

Learn More.

Batch Payments for Legal Aid

Easily and conveniently record payments from the Legal Aid Agency against multiple matters with outstanding balances.

Clio's batch payments feature for Legal Aid practitioners in England and Wales enables you to open a list of all matters with outstanding balances and enter payment details from the Legal Aid Agency.

Learn More.

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Stay tuned for more new features and Clio integrations! Not a Clio customer? Don't miss out on the most powerful and easy-to-use cloud-based practice management platform.

Try Clio for free today.

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.