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# CLIO APP INTEGRATIONS SPECIAL EDITION

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## About

The Clio App Integrations Buyer's Guide is a publication of the Legal Tech Publishing division of the Legal Tech Media Group (LTMG) **legaltechmg.com**.

Legal Tech Publishing is highly recognized for its publications, educational webinars, case studies, and whitepapers.

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## Welcome to the Clio App Integrations Guide By: Cathy Kenton and Brian Dalton



This guide is the inaugural edition of the Clio App Integrations Guide. Clio's law firm customers serve a wide variety of clients. Our goal in publishing this guide is to help you quickly and easily identify products that work well with Clio and add value to your practice.

While every Clio app integration partner wants you to know how their product works with Clio, this guide spotlights some of those companies and their commitments to the legal profession, we encourage you to learn more about each of the companies featured here.

To your success,

**Cathy Kenton**, CEO, Legal Tech Media Group/ Legal Tech Publishing and **Brian Dalton**, SVP, Breaking Media

**Cathy Kenton**, CEO, Legal Tech Media Group/Legal Tech Publishing



Brian Dalton, SVP, Breaking Media



## Al-Enhanced Passive Time Keeping That Tracks Time Spent Working on Documents, Emails and Websites. Built in Salesforce.

#### No more guessing, timers or stopwatches

Chrometa's PC, Mac and Android trackers run in the background and record time spent working on every document, email, website or phone call, with detailed timestamps and screenshots.

Time is then collected from all your devices (laptop, office computer, remote desktop...) and allocated to your clients and matters using keywords and self-learning AI. Chrometa's self-learning AI is artificial intelligence that can train itself using unlabeled data. On a high level, it works by analyzing a dataset and looking for patterns that it can draw conclusions from. It essentially learns to "fill in the blanks."

Once you review, edit and approve your timesheet, and your team members' timesheets, you can export the data to your practice management system or billing system.

Chrometa can also be used as a standalone solution for invoicing and client management.

For more information, please visit www.chrometa.com

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**Company Name Chrometa** Find us on **Linkedin** 





Chrometa Provides AI-Enhanced Passive Time Keeping and Automatically Tracks Time Spent Working on Documents, Emails and Website, Files Time Entries under the Correct Matter and Exports them to your favorite practice management's Timesheets. Built in Salesforce.



Founded in 2007 in Sacramento, in the pre-cloud era, Chrometa is an all-in-one timekeeping and productivity platform and a business approach on a mission to automate the tedious tasks of timekeeping. First a desktop application only, it migrated to the cloud in 2011.

Since 2007, Chrometa has expanded with offices in the US, Europe and Africa.

Built on Salesforce, it provides a robust, intuitive, scalable and secure set of desktop and cloud solutions.

Chrometa's end-to-end platform streamlines and automates time tracking, time allocation, invoicing and team reporting.



## Dialpad: Call, Message, and Meet in One, Beautiful Ai-Powered App.

#### Loved by 400+ legal teams big and small

Dialpad helps law firms and legal departments improve client experiences, increase ongoing profitability and competitiveness by providing a complete communications platform with enterprise-grade security that enables attorneys to work smarter, faster, and more efficiently from anywhere.

#### • Ai at every step

Built-in Ai transcribes calls, takes notes, and tracks action items—so you can stay focused on the conversation.

• A better client experience

Call, message, text, and meet virtually with clients, all from the desktop or mobile app—while shielding your personal number.

Never miss a billable minute

Even when you're on-the-go, every call and meeting record is immediately captured and logged, then exported for billable hour tracking.

Secure all confidential communications

Whether it's a voicemail, text message, or fax, all your data is safeguarded at rest and in transit.

• Pairs perfectly with Clio

Instantly sync client information and call notes without copying and pasting back and forth. Calls are logged straight into Clio, including client profile, timestamp, duration, and relevant matters. Plus, you can call clients right from Clio just by clicking on their number.

#### See how Harrelson & Harrelson uses Dialpad + Clio.

For more information, please visit www.dialpad.com



**Company Name** Dialpad Find us on Linkedin





Dialpad is the leading Ai-powered Customer Intelligence Platform that is completely transforming how the world works together. We've designed one, beautiful workspace that seamlessly combines the most advanced Ai Contact Center, Ai Sales, Ai Voice and Ai Meetings with Ai Messaging. More than 30,000 innovative brands and millions of people use Dialpad to unlock productivity, collaboration, and customer satisfaction with real-time Ai insights. Visit dialpad.com to learn more.

**Company History** Dialpad offers businesses of all sizes a robust, reliable, and cost-effective way to connect with their customers and employees. Dialpad was founded in 2011 by Craig Walker, who previously co-founded GrandCentral (which was acquired by Google in 2007). Since its inception, Dialpad has been on a mission to make it easier for businesses to communicate. Built on Google Cloud, Dialpad offers a wide range of features and integrations that allow businesses to customize their communications solutions to fit their specific needs. Dialpad is headquartered in San Francisco, and also has offices in Austin, Toronto, London, and Tokyo.



## InfoTrack Integrates with Clio for Automated eFiling, Service of Process, and More.

At InfoTrack, our mission is to deliver seamless, end-to-end litigation solutions for legal professionals across the firm. We integrate with Clio to enable law firms to order eFiling, Service of Process, Court Searching, and more — directly from your matter. Documents and data sync back to the matter, cutting out lots of busy work.

With connections to state courts across California, Florida, Illinois, Indiana, Maryland, New York, and Texas (with more states under development), InfoTrack has wider coverage than any other eFiling service provider in the market.

#### The InfoTrack integration with Clio...

- · Connects to your matter to easily select documents to file and serve
- · Syncs returned documents from courts and servers
- Passes fees and charges to the billing section of your matter
- · Provides industry-leading customer support

With InfoTrack, law firms can complete tedious tasks more quickly and accurately than ever before. All orders are tracked on a per-transaction basis so all costs can be expensed directly to the client. Monthly billing and multiple payment options provide flexibility and more potential for firms to make business decisions that work best for them and their clients.

For more information, please visit www.infotrack.com



**Company Name** InfoTrack Find us on Linkedin





InfoTrack integrates with Clio and other popular legal software to streamline the litigation workflow. By automatically syncing client data, case documents, and billing information, InfoTrack helps law firms manage eFiling, process serving, eSignatures, and more with greater speed and accuracy. With InfoTrack, law firms have the power to improve productivity and increase profitability.

Company History

More than 20 years ago, InfoTrack revolutionized the legal and conveyancing industries in Australia by building technology that empowered anyone to find, analyze, organize, and communicate information more efficiently. In the decades that followed, InfoTrack expanded to New Zealand, the United Kingdom, and the United States, carrying out its mission to build software that streamlines legal processes. Today, InfoTrack connects tens of thousands of professionals with the hundreds of millions of data points they need every day.

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## Seamlessly Manage Every Aspect of the Client Relationship by Connecting Your Clio Account to Lawmatics.

#### Transition from client intake in Lawmatics to client management in Clio

The Lawmatics and Clio integration covers the entire client lifecycle from initial client intake to repeat business — no need for duplicate entry or management of many legal technology systems. With a direct integration between the two platforms, Lawmatics users can automatically or manually sync their matters to the Clio platform.

Your Lawmatics Matters will automatically create corresponding Matters and Contacts in Clio, as well as sync documents when a lead turns into a client. Transition smoothly from the client intake process to case management with the click of a button or a hands-free trigger. Say goodbye to the painstaking, redundant data entry process. With your Lawmatics and Clio accounts connected, you won't have to worry about information slipping through the cracks.

For more information, please visit Lawmatics.com

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**Company Name** Lawmatics Find us on Linkedin





As an all-in-one CRM platform, Lawmatics can automate the most robust suite of client engagement tools, from emails and scheduling to document assembly, e-signature, time & billing, and more. No matter the practice area or size of firm, Lawmatics enables law firms to streamline their operations, impress clients, win more business, and get paid. Our legal software integrations allow you to automate the repetitive tasks between apps and build a best in class tech stack for your business.

Company History Lawmatics was founded in 2017 by attorney and entrepreneur Matt Spiegel. Having previously founded MyCase, Matt developed a vision of law firm automation based on his experience in legal technology. Law firms have too many tasks to complete in too little time. Automating with Lawmatics lets law firms save time and win more business. Based in La Jolla, California, Lawmatics was named a 2022 Hot Product by TechnoLawyer and has repeatedly been recognized as a Momentum Leader in G2's guarterly reports.



## Medical Chronologies, Demand Letters and Medical Opinions Prepared by Physicians and Attorneys Using Medilenz's Proprietary Al.

#### **Medical Chronologies:**

Medilenz chronologies are a succinct and comprehensive list of medical providers, dates of services, and a summary of all treatments, procedures and diagnoses rendered to the patient for each treatment date. It also contains interactive hyperlinks for easy navigation and is delivered in both Word and PDF formats.

Attorneys use these chronologies to accurately determine their clients' injuries, diagnoses, treatment course as well as their pre-existing medical conditions. Medical expense sheets, deposition summaries and plaintiff fact sheets are also completed upon request.

Medilenz's proprietary AI automatically de-dupes the medical records, indexes them and identifies missing medical records, which result in higher recoveries for plaintiffs.

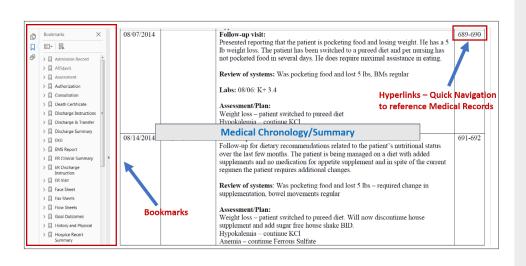
#### **Comprehensive Demand Letters:**

Never draft a demand letter again. Medilenz's Comprehensive Demand Letters include details of injuries suffered, including ICD codes for each injury, highlights of each medical treatment visit, a summary of providers including medical expenses incurred and future medical costs. We also include loss of earnings, loss of household services, pain and suffering, and past verdicts in your jurisdiction if appropriate. Medilenz has been told that we go "above and beyond" and draft the most persuasive demand letters that our clients have ever seen.

#### **Medical Opinions:**

Medilenz utilizes non-testifying practicing physicians in dozens of practice areas who provide preliminary opinions to medical malpractice attorneys as to whether or not there has been a deviation in the standard of care of their clients, and whether or not the potential deviation led to the causation of any injuries. At \$50 per hour, our clients save innumerable amounts of money before hiring a testifying physician to review the potential case.

For more information, please visit www.medilenz.com



**Company Name** Medilenz Find us on Linkedin





Medilenz has been an industry leader in creating medical chronologies, demand letters, pain and suffering charts, medical opinions and medical narrative summaries for attorneys, life care planners and IME's for over 5 years. Medilenz is the first medical records company to incorporate AI into its process, which automatically identifies missing records, duplicate copies, and automatically indexes the medical records, saving our medical professionals time to focus on homing in on key information found in the medical records to support our clients' cases.

Company History Medilenz was formed in 2017 by Rachel Shapiro, Esq., an attorney based in California, and Badari Pandith, a physician based in Bangalore, India. Medilenz now employs a staff of 100 medical and IT professionals, and summarizes over 2000 medical files for our clients every month.

## netdocuments<sup>®</sup>

## The World's #1 Trusted Cloud Platform Where Legal Professionals Do Their Best Work.

#### Make Your Documents and Email Work Smarter for You

NetDocuments is where legal teams secure, organize, automate, and collaborate on their most important documents and data. Whether you spend your time in email, documents, or Teams, on a laptop, smartphone, or other device, the benefits of NetDocuments seamlessly integrate with the tools you already use every day.

Reach new levels of productivity and collaboration with a robust single, unified platform that allows for endless innovation, reliability, scalability, and defensibility of security. Wherever your business is now or in the future, you need technology partners that can meet and support you there. Make your documents and emails work smarter for you with an award-winning cloud-based platform that enables your teams to do their best work.

#### A Focus on User Experience and Adoption Rates

The NetDocuments one platform approach allows legal teams to elevate their tech to create the user experiences people want and expect. Our open APIs and award-winning partner program connect NetDocuments customers with 150+ apps and deep integrations with Microsoft, DocuSign eSignature, LexisNexis, and Upland BA Insight. The flexibility of our platform and our ongoing focus on dependable innovation create endless opportunities for better ways of working and higher adoption rates.

Discover how your organization can boost productivity and improve efficiencies with a tool your people want to use. Get a personalized demo of NetDocuments at **netdocuments.com/demo-request.** 

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**Company Name** NetDocuments Find us on Linkedin





NetDocuments is the #1 trusted cloud-based content management and productivity platform that helps legal professionals do their best work. Backed by over 20 years of experience in native cloud innovation, NetDocuments offers a complete end-to-end platform for document and email organization and management, including award-winning security and research capabilities; robust automation, collaboration, and search technologies; and seamless integrations with other tools professionals use daily. NetDocuments supports 7,000+ law firms, corporate legal departments, and public sector entities globally.

Company History

NetDocuments is a cloud-first, cloudonly platform that was founded over 20 years ago. Since then, NetDocuments has evolved into a proven, modern platform that delivers dependable innovation, uncompromising security, and a breadth of capabilities that enable legal professionals to do their best work. Rooted in our DNA is our passion for people – and our customers – to anticipate their needs ahead of the curve and reliably adapt and scale as the needs of customers and the industry evolve.



## Nota Allows Law Firms to Take Control of Their Accounts with Annotation, Real-Time Reconciliation, and Financial Services with Concierge Support.

#### Running a Law Firm is Tough. Your Banking Shouldn't be.

Nota by M&T Bank delivers a personalized, enhanced digital banking experience for solo and small law firms. As a result, attorneys can confidently manage their firm's operating and trust accounts with a clear view and transparent reconciliation of every penny. Backed by M&T Bank. Reconciliation, Powered by Nota. No more spreadsheets or ledgers to track your client balances. Instead, all money in and out of your Clients' Funds Trust Accounts can be assigned to a client matter and reconciled in real-time. Even better, integration with Clio, LawPay, and Quickbooks eliminates wasted time on re-entry. Nota's goal is to personalize banking for the legal industry, providing a complete suite of finance and management resources for the unique needs of solo and small firms.

#### For more information, please visit www.trustnota.com

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**Company Name Nota** Find us on Linkedin



## About

Nota by M&T Bank is a division within M&T Bank that focuses solely on providing a digital banking platform and service to solo and small law firms. Built by Attorneys, Nota continually works with Attorneys for feedback and guidance. Nota's aims to provide our customers with an enhanced banking experience that is both secure and easy to use. We are currently located and offer service in 14 states NY, NJ, MD, PA, DE, CT, VA, DC, NH, MA, ME, VT, FL, or WV.

**Company History** After many conversations with attorneys, we wanted to improve and overcome the many challenges that come with running a solo or small firm. We first tackled one of the biggest pain points attorneys face – Clients' Funds Trust Account (IOLTA / IOLA) management. We've mastered all the intricate in's and out's of an arduous trust account reconciliation process and streamlined it so it can be done at the touch of a button.



## The Easy, One-Touch Scanning Solution

#### With ScanSnap, you can digitize your world with the push of a button

ScanSnap scanners are the perfect digitization tool for small businesses who need to get more out of their paper-based data.

The ScanSnap iX1600 makes it easy to be productive, with a large and intuitive 4.3" touch screen, automated image correction and ultra-sonic feed detection. And one of the best functions of this full-featured scanner is called deviceless scanning using Wi-Fi connectivity. This means that you do not need to open your computer or mobile device to coordinate where you want the scanned image to go. Instead, when you set up a profile on the scanner, you can simply indicate which cloud service you'd like to use. You also get ScanSnap Cloud with the iX1600, which works with popular services like Clio, NetDocs, Evernote, Dropbox and more.

For more information, please visit www.pfu-us.ricoh.com/scanners/scansnap





For more than 20 years, ScanSnap has been dedicated to improving personal productivity, organization, and efficiency. Our market-leading technology, with simplicity at its core, helps you quickly digitize your important documents, photos, and more — with just the touch of a button.

**Company History** For more than 50 years, the PFU group of companies ("PFU") has been developing technologies to accelerate digital transformation for organizations around the world—including our state-of-the-art fi Series and ScanSnap document scanners.

In 2022, we joined the Ricoh Group of companies and changed our name from Fujitsu Document Scanners to Ricoh Document Scanners. Besides the change in branding, our customers and partners can expect the same level of excellence, quality, and reliability. The R&D, manufacturing, sales, marketing, and services that our customers and partners know and trust will stay exactly the same.





## Automatic Billing Solution That Allows Users to Work Naturally without Changing Habits or Learning New Software.

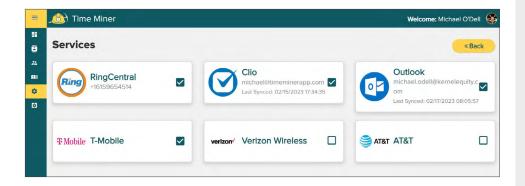
Time Miner is the only automatic, retroactive time capture tool available on the market today that integrates with a firm's Clio, email, and VoIP phone system. Maybe more importantly, with Time Miner you don't have to change the way you work. At the end of each month, Time Miner reports all the .1s and .25s spent sending emails, talking on the phone, texting with clients, and participating in online meetings.

Studies show that the average lawyer can only account for 30% of the time they spend working on matters. Most Time Miner users report that they end up doubling the amount of time they capture! And even better, they do so without having to manually add every tiny communication transaction to their legal practice management software.

With Time Miner users can work on-the-go. Time Miner takes the minutiae of time keeping off your plate so that you can concentrate on doing what you do best. Find out how Time Miner can make your work day more efficient and less stressful. Set up is quick and easy...our software does all the hard work for you. Time Miner is built for both sole practitioners and firms alike. Individual timekeepers can use our simple interface to approve time and push it to a pre-bill. For firms with administrative support, Time Miner allows admin staff to further reduce the burden of timekeeping by managing the platform for the entire firm.

Time Miner is built for lawyers, by lawyers. Try it today and capture more time, more accurately, & more effectively.

For more information, please visit www.timeminer.com/clio



**Company Name Time Miner** Find us on **Linkedin** 





Time Miner for Teams is an automatic billing solution that allows users to work naturally without changing habits or learning new software. Time Miner connects users' disparate tools, including VoIP and email, with existing practice management software and captures billable time automatically. The only solution of its kind on the market, Time Miner distinguishes itself further by providing a guarantee: If Time Miner fails to pay for itself, your subscription will be refunded, no questions asked.

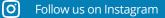
**Company History** Time Miner was founded in 2018 to address a huge gap in the time capture market. After 3 years of steady growth, Time Miner took on partners in 2021 and expanded its features and functionality significantly based on user feedback. Time Miner is the result, launched in 2023.

## Thank you for reading, let's keep in touch!

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