Clio | BILLING INTEGRATION

Export Options –Client/Matter Information

Users will need to manually export client/ matter information.

Frequency

The sync can be scheduled to run on the hour or every half-hour.

Export Options –Transactional/Cost Information

Papercut will automatically export a CSV file to a Windows folder on a scheduled basis.

The importing of data (cost recovery) into Clio is always manual.

The transaction import uses the standard Expense Entry import tool built into Clio.

Frequency

Daily, weekly, or monthly.

Required Modules

- Both the export of matters to PaperCut and the import of charges from PaperCut use the Clio's native import and export functionality. No additional modules are required.

Data Export From Clio (To PaperCut)

- Client/ matter information can be manually exported from Clio using Clio's native Matter export functionality.

Data Import To Clio (From PaperCut)

- Papercut will automatically export a CSV file to a Windows folder on a scheduled basis.
- The importing of data (cost recovery) into Clio is always manual.
- The transaction import uses the standard Cost Recovery import tool built into Clio.

Vendor Support

- The customer does not need to schedule time with Clio vendor support. ACDI is very familiar with working with Clio.

Scheduling

- If the customer chooses to manually export data from Clio, then the Clio integration can typically take place on the same day as the PaperCut installation.
- If the customer is working with a Managed Service Provider (MSP), please allocate extra time for the MSP to set up the correct permissions for database access.

acd-inc.com/integrations/