

# 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.