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following sections and articles provide instructions for working with Clio's built-in document storage and sharing solution. Video: How to Generate a Document from Template. Video: How to Upload a Template for Document Automation.

Working with Clio Documents - Clio Help Center

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with full version control and rights provisioning. These layers of functionality are designed specifically for the use of law firms, ensuring client confidentiality and security is never compromised.

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Clio Manage: Law Practice Management System

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for Law Firms

The Clio API gives you and your approved developers secure access to the data in your Clio account. All Clio accounts, including free 7-day trial accounts, can be accessed using the documented Clio API. Learn how to make requests and receive data programmatically today (no need for lengthy signups or approvals).

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Clio API V4 Documentation

Go to your Clio settings panel by clicking on the gear icon in the Clio header, then click "Documents" in the System column. From the Documents settings, click the "Document Sources" sub-tab. Scroll down to "Google Drive" and click the "Configure Google Drive" link. Link your Google Drive

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account by clicking on the "Enable Google Drive" button.

Google Drive: Setup - Clio Help Center

Manage and grow your law practice with the easy-to-use legal software solutions that Clio provides to manage cases, client intake, billing, and more. We've curated some resources to help lawyers navigate the challenges of

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keeping your data secure and safe is important.

Clio - Login

Clio's Integration with NetDocuments allows users to: Upload documents to NetDocuments and associate them with Matters in Clio; Use their favorite programs to create, open and save documents directly to NetDocuments / Clio...

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Powerful full-text searching of documents within NetDocuments; and. ...

NetDocuments: Setup - Clio Help Center

Once a you have enabled the Sign with DocuSign app by logging into your DocuSign account, a Custom Action will be added to all of your Documents in Clio.

When the Custom

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Action is clicked, the document will be opened in DocuSign, where it can be prepared and shared for signing.

Sign with DocuSign Integration for Clio | Clio

In this video, we will walk through how to create a template to be used for Document Automation.

How to Create a

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Template (Document Automation)

In this video, we will walk through how to upload documents into Clio's unlimited cloud storage, as well as how to download documents from your Clio account.

How to Upload and Download Documents

Next to each document in Clio is an icon for opening it externally.

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When you click that, the Clio Launcher opens the document in your default desktop editor for that type of document, such as Microsoft Word or Excel. When you are done and save the file, it is saved back to Clio with the edits. Clio also tracks prior versions of the document.

**New Clio Feature
Opens Documents In
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...

In this video, we will walk through how to generate a document from template using the Document Automation feature. ... Clio 8,485 views. 3:19. Microsoft word tutorial

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How to Generate a Document from Template

With Clio Connect, Clio's client portal, you can share documents

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and calendars, send secure communications (more secure than standard email if you're paranoid), and provide your clients with invoices that they can pay via the client portal. Get clients to pay via the client portal?

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