

Seamless Clio/NetDocuments® Synchronization

Instantly sync Client and Matter data between Clio and the DMS

Professional Services firms leveraging Clio's case management system and NetDocuments' document management system require a simple and effective way to view documents and automatically synchronize Client and Matter data.

To address this challenge, GDSI has applied all of its experiences with Clio and NetDocuments to offer a best-in-class solution, making your Clio and NetDocuments sync seamless and even more powerful.



KEY FEATURES

- Automatically syncs Client and Matter data from Clio to NetDocuments
- Support for an unlimited number of Cabinets
- Maps custom Client Code field (or any variation) to the specific Cabinet Client Key
- Maps the Matter Number field (or any variation) to the specific Cabinet Matter Key
- Create Workspaces automatically based on Clio custom fields
- Security synchronization from Clio to NetDocuments
- Default options for selecting non-synchronized Matters
- Custom field mapping from Clio to NetDocuments for Workspaces
- Utilize the existing NetDocuments interface within your browser
- Support for custom settings and actions using GDSI's development services
- Simple and fast setup, takes minutes
- ...and many more custom options!

PRICING

Based on the number of Clio licenses owned

\$5/seat/month

Additional setup fees may apply should the firm require a custom setup

TECHNOLOGY PLATFORM

- Integration for NetDocuments is built on the GDSI Private Cloud, available 24/7/365
- Logging for problematic synchronizations
- Accommodates all browsers