

# Seamless Clio/Worldox™ Synchronization

Automatically synchronize Client and Matter data from Clio to Worldox

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

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



## KEY FEATURES

- Automatically syncs Client and Matter data from Clio to Worldox
- Support for an unlimited number of Cabinets
- Maps custom Client Code field (or any variation) to the specific Cabinet Client field
- Maps the Matter Number field (or any variation) to the specific Cabinet Matter field
- Default options for selecting non-synchronized Matters
- Utilize the existing Worldox Web 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!

## TECHNOLOGY PLATFORM

- Integration for Worldox is built on the GDSI Private Cloud, available 24/7/365
- Requires Worldox Web Services (3.2 and higher)
- Worldox Web on-premises or in the Cloud
- Logging for problematic synchronizations
- Accommodates all browsers supported by Worldox Web Services

## PRICING

Based on the number of Clio licenses owned

\$5/seat/month

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