

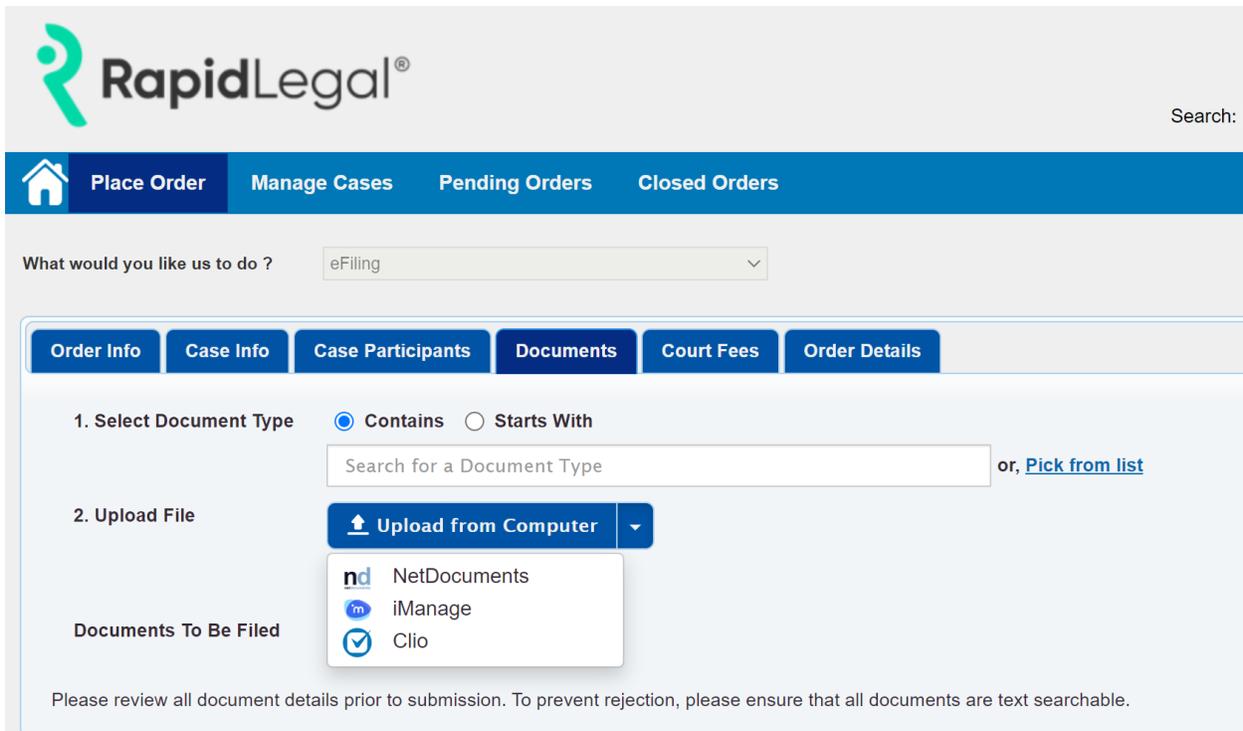
Activating and using Clio in your Rapid Legal Account

When the Clio integration is enabled, you will see the Clio option on the Documents tab when placing an eFiling order.

(Please note: Only Rapid Legal customers who have a Clio account will be able to make the connection and use the integration.)

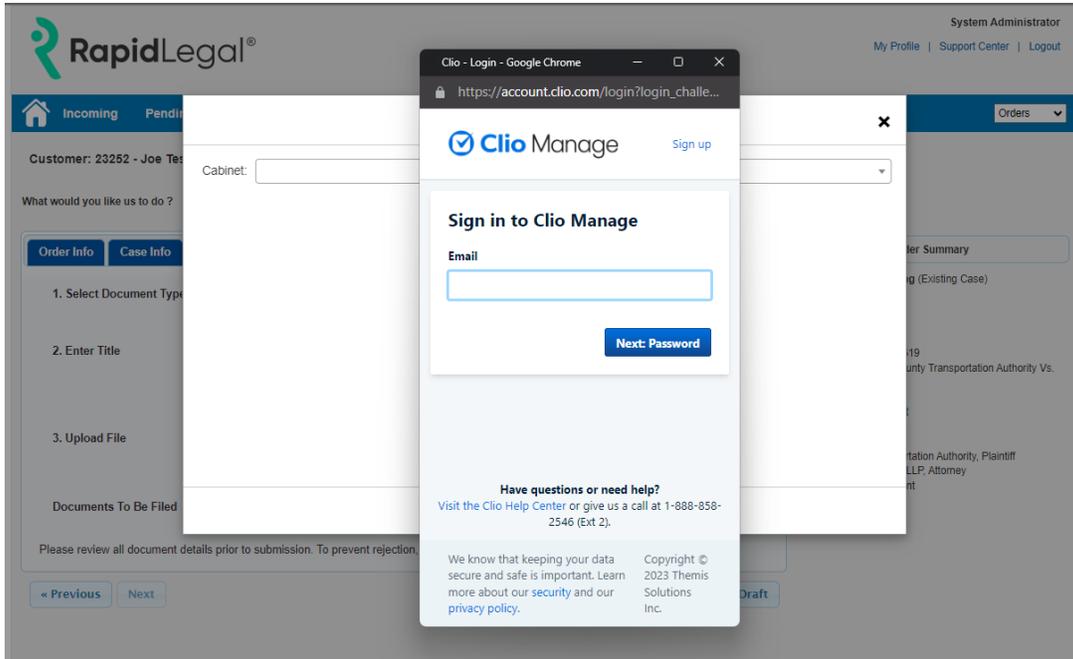
After selecting to upload a file from Clio, the user will be prompted to make the connection.

1. From the “Documents” tab of an eFiling order, after selecting a Document Type, click the “Browse” button then “Clio”.

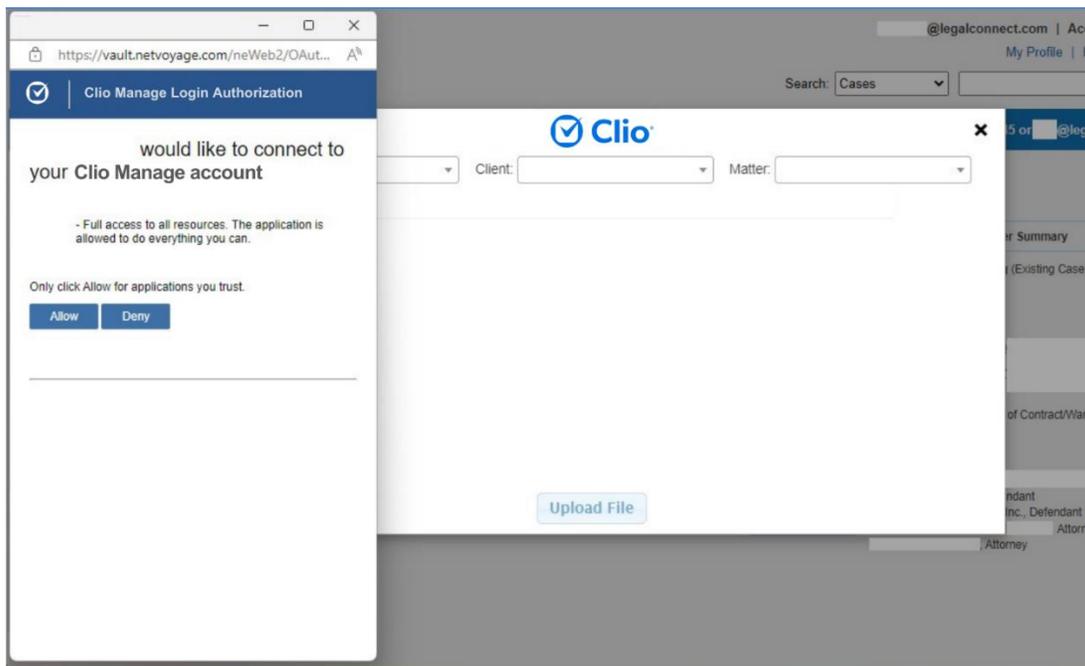


The screenshot shows the RapidLegal eFiling interface. At the top, there is a search bar and a navigation menu with options: Place Order, Manage Cases, Pending Orders, and Closed Orders. Below the navigation, there is a dropdown menu for 'What would you like us to do?' with 'eFiling' selected. The main content area has several tabs: Order Info, Case Info, Case Participants, Documents (selected), Court Fees, and Order Details. Under the 'Documents' tab, there are two sections: '1. Select Document Type' with radio buttons for 'Contains' (selected) and 'Starts With', and a search box for 'Search for a Document Type' with a link 'or, Pick from list'. The second section is '2. Upload File' with a button 'Upload from Computer' and a dropdown menu. The dropdown menu is open, showing three options: 'nd NetDocuments', 'm iManage', and 'Clio' (which is checked). Below the dropdown, there is a section 'Documents To Be Filed' with a checked box next to 'Clio'. At the bottom, there is a disclaimer: 'Please review all document details prior to submission. To prevent rejection, please ensure that all documents are text searchable.'

2. A pop-up window will open asking you to enter your Clio credentials.



3. After providing your Clio credentials, you will be asked to allow the connection to your Clio account.

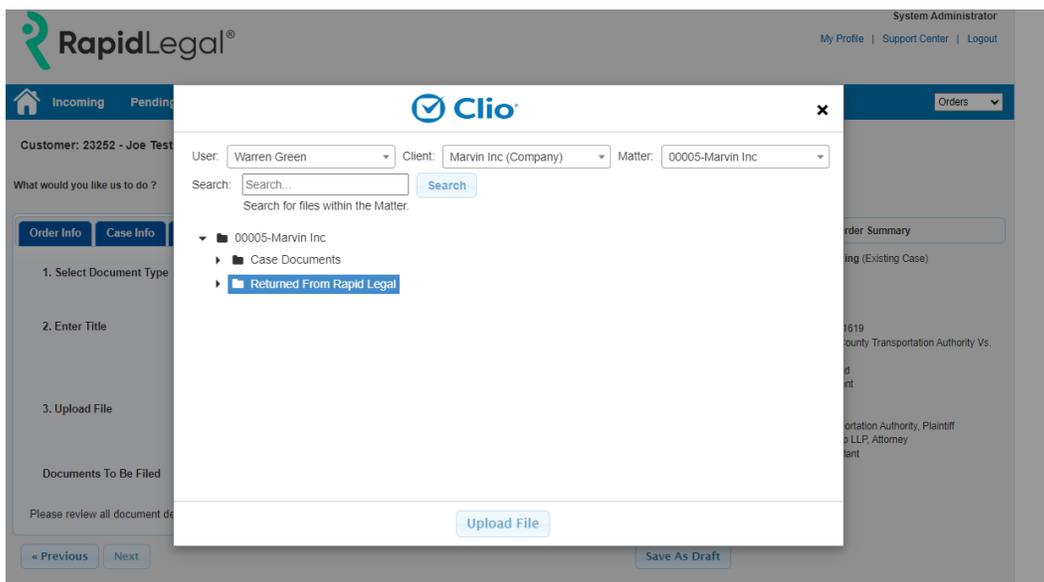


- Once the connection is allowed, the pop-up window closes, and you will be returned to the Rapid Legal order process and see the Clio file selection window.

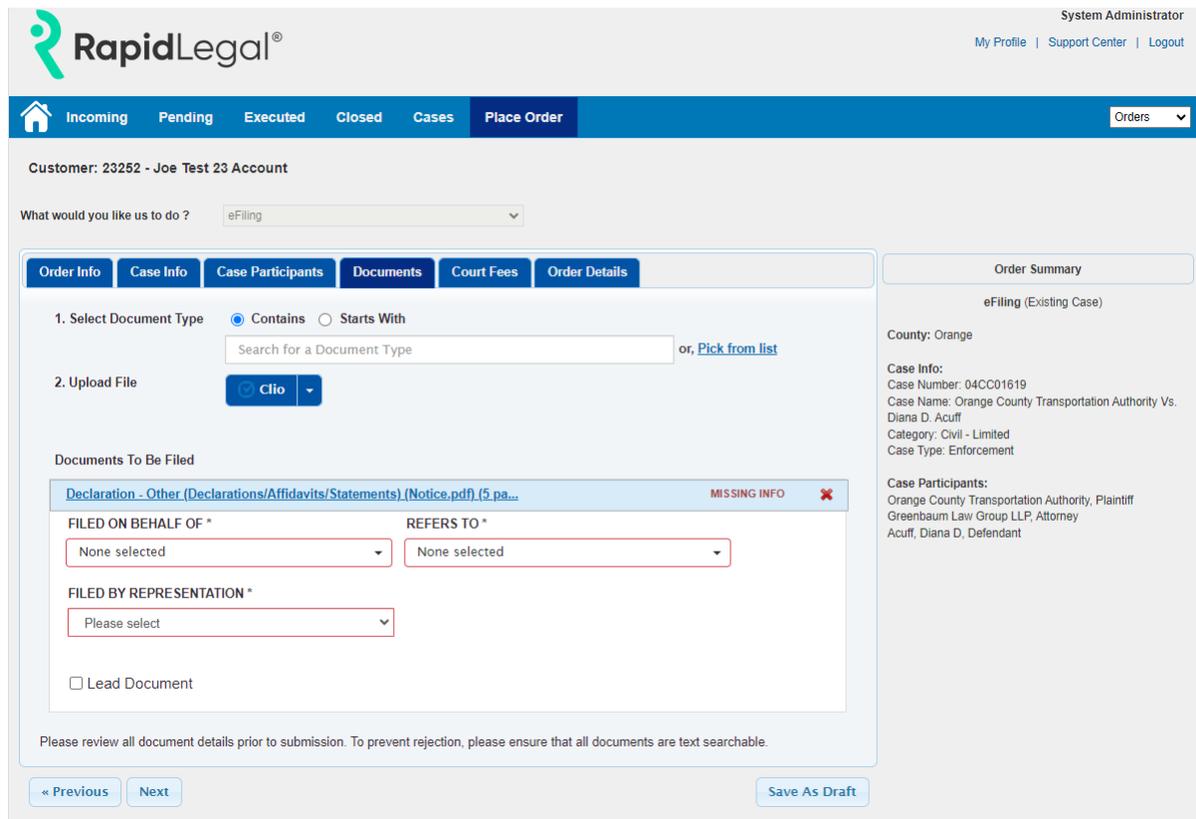


Uploading a Document to Rapid Legal from Clio

- After establishing the connection between Rapid Legal and Clio, you can browse to a Clio Cabinet, Client, and Matter and see the folders and files.



- After selecting a file and clicking the “Upload File” button, the document is pulled directly from Clio into Rapid Legal, added to your order, and appears in the “Documents To Be Filed” section. **PLEASE NOTE:** All document PDFs must conform to court rules for submission. A password-protected, or fillable pdf document will cause an error message to be displayed.



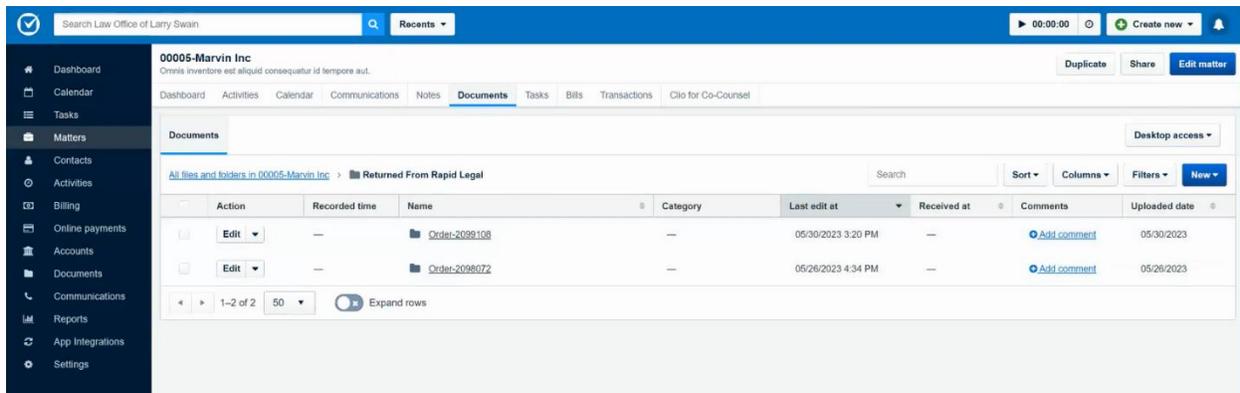
The screenshot shows the 'Place Order' page in the RapidLegal system. At the top, there is a navigation bar with tabs for 'Incoming', 'Pending', 'Executed', 'Closed', 'Cases', and 'Place Order'. The 'Place Order' tab is active. Below the navigation bar, the customer information is displayed: 'Customer: 23252 - Joe Test 23 Account'. A dropdown menu for 'What would you like us to do?' is set to 'eFiling'. The main content area is divided into two sections: 'Order Info' and 'Order Summary'. The 'Order Info' section has tabs for 'Order Info', 'Case Info', 'Case Participants', 'Documents', 'Court Fees', and 'Order Details'. The 'Documents' tab is selected. Under '1. Select Document Type', there are radio buttons for 'Contains' (selected) and 'Starts With'. A search box for 'Search for a Document Type' is present, with a link to 'Pick from list'. Under '2. Upload File', there is a 'Clio' button. The 'Documents To Be Filed' section shows a document titled 'Declaration - Other (Declarations/Affidavits/Statements) (Notice.pdf) (5 pa...'. Below this, there are dropdown menus for 'FILED ON BEHALF OF *' (set to 'None selected'), 'REFERS TO *' (set to 'None selected'), and 'FILED BY REPRESENTATION *' (set to 'Please select'). There is also a checkbox for 'Lead Document'. At the bottom of the form, there are buttons for '< Previous', 'Next', and 'Save As Draft'. The 'Order Summary' section on the right shows 'eFiling (Existing Case)', 'County: Orange', and 'Case Info' including Case Number: 04CC01619, Case Name: Orange County Transportation Authority Vs. Diana D. Acuff, Category: Civil - Limited, and Case Type: Enforcement. It also lists 'Case Participants' as Orange County Transportation Authority, Plaintiff; Greenbaum Law Group LLP, Attorney; Acuff, Diana D, Defendant.

Viewing Documents Returned from the Court

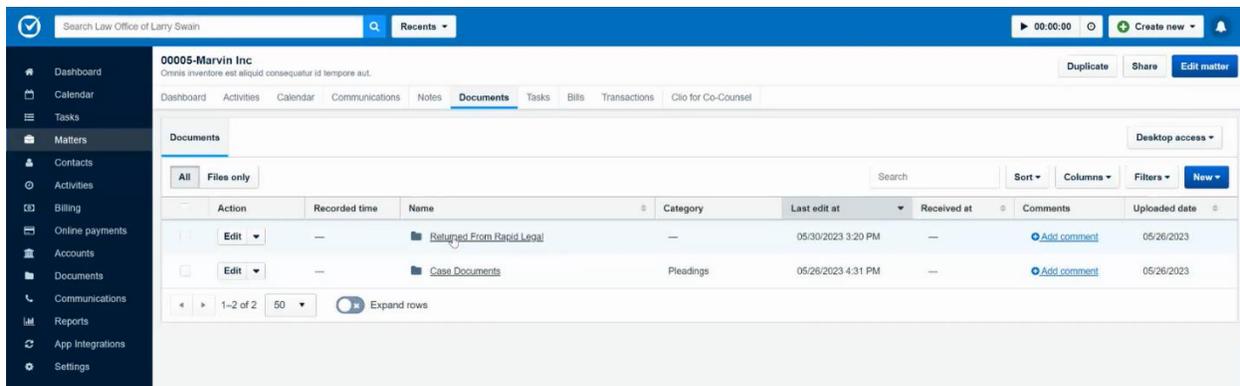
Court-returned documents will be viewable in the “Deliverables” tab of your Rapid Legal order. You will receive an email from Rapid Legal indicating whether your eFiling order was Accepted, Rejected, or Partially Accepted, along with links to download the documents.

In addition, the court-returned documents will be automatically saved into your Clio account under the Client and Matter you selected when submitting the order.

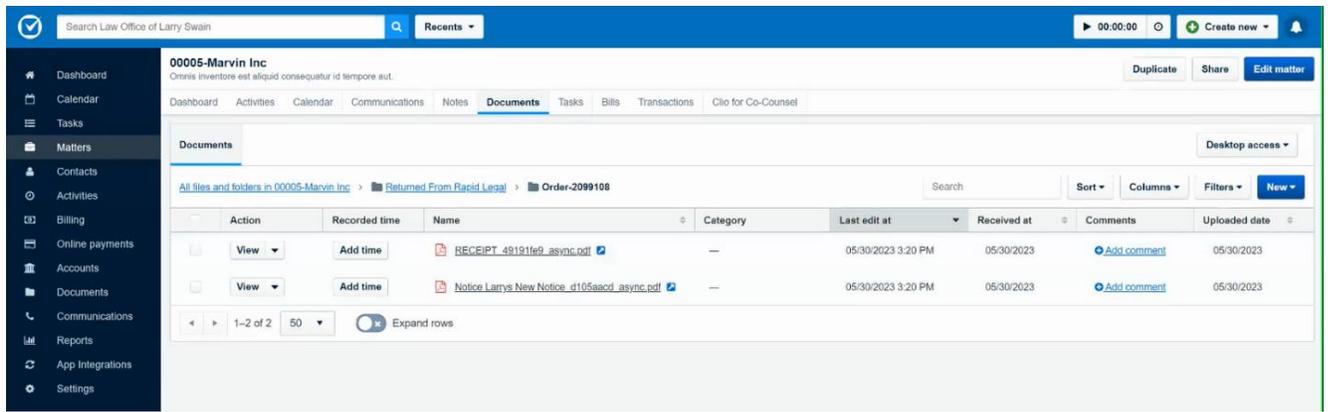
1. To access, log into your Clio account and navigate to the Client and Matter you selected when submitting the eFiling order in Rapid Legal. Locate the folder named “Returned from *Rapid Legal*,” whose portal you used to submit the eFiling order.



2. In the “Returned from *Rapid Legal*” folder, you will see a list of all Rapid Legal orders submitted under this Client and Matter. Locate the proper folder by matching the Order Number assigned when the eFiling order was submitted in Rapid Legal.



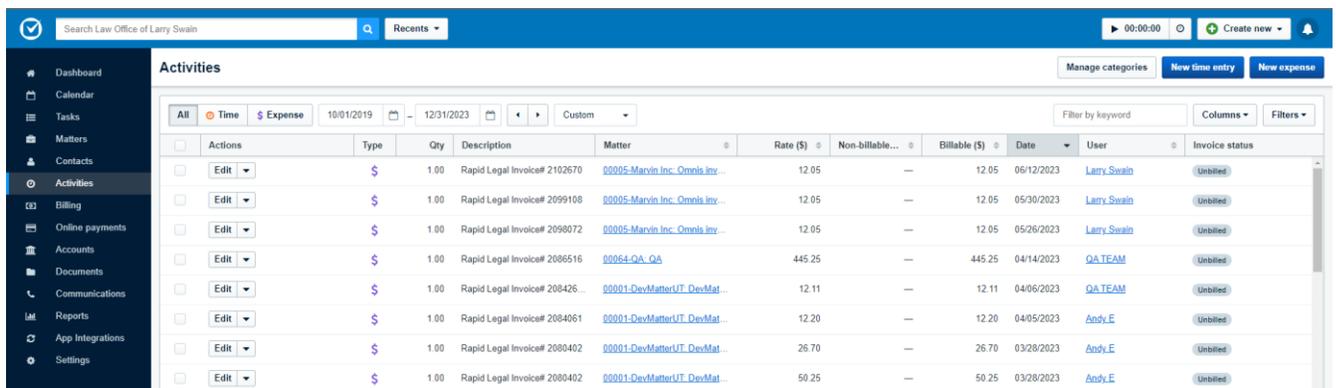
3. In the folder “Order-#####” you will see all documents returned from the court including stamped conformed copies, receipts, and notices as appropriate.



Viewing Invoices and Expenses

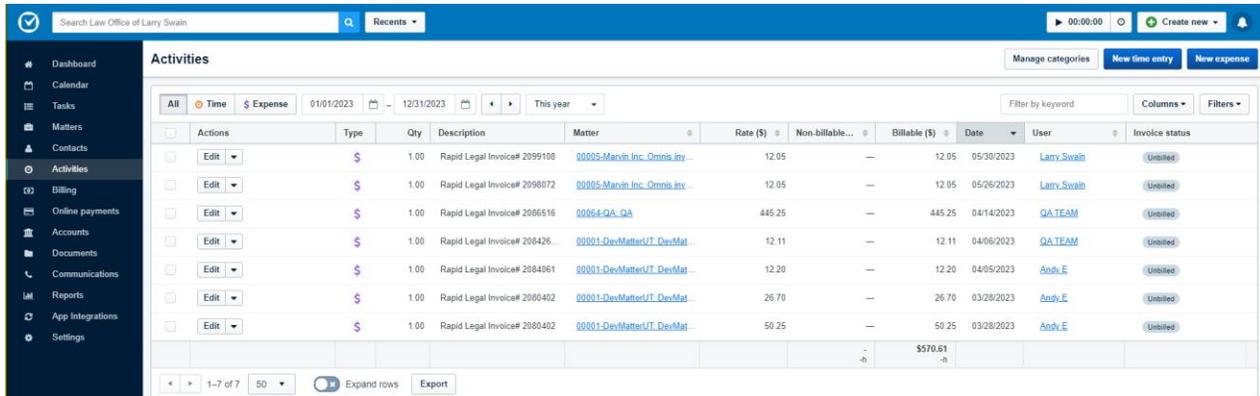
Billing data from submitted Rapid Legal eFiling orders are also populated and saved within your Clio account. On the “Activities” page, you can view and edit expenses from your eFiling order.

1. To view invoicing data and edit expense entries, click on the “Activities” button on the left-hand side of the portal. On this page, you will see the expenses related to their particular eFiling order. You can navigate your eFiling expenses by their matter, date, or type as well as check the status of a particular expense’s invoice.



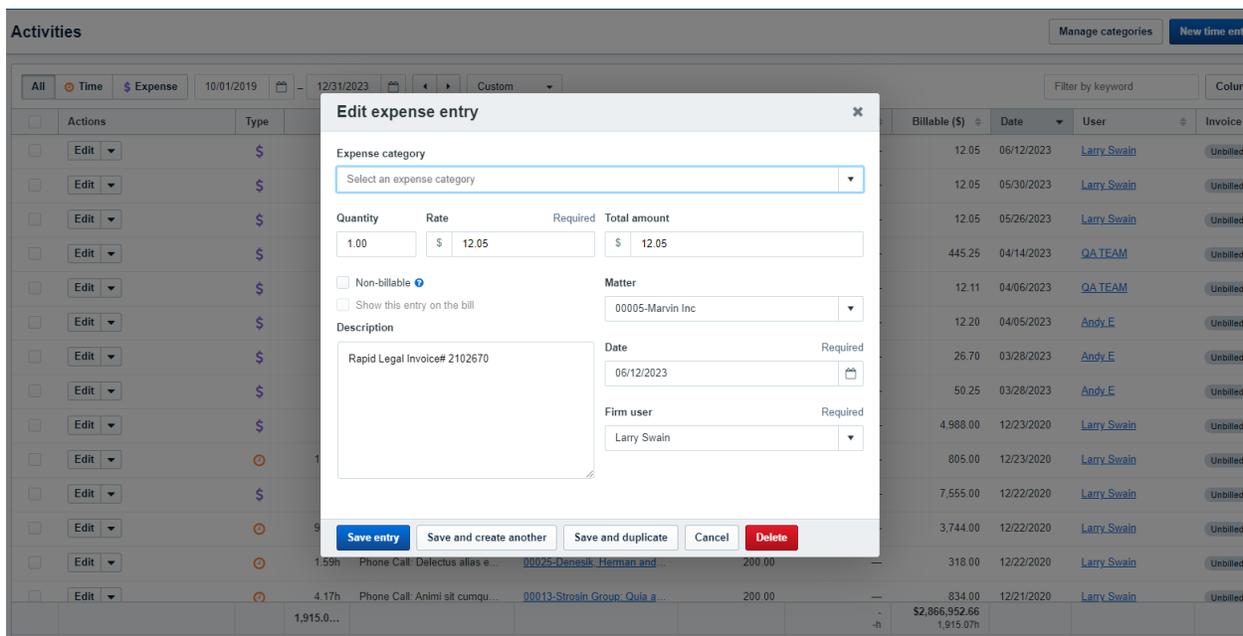
Actions	Type	Qty	Description	Matter	Rate (\$)	Non-billable...	Billable (\$)	Date	User	Invoice status
Edit	\$	1.00	Rapid Legal Invoice# 2102670	00005-Marvin Inc. Omnisc Inv ...	12.05	—	12.05	06/12/2023	Larry Swain	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2099108	00005-Marvin Inc. Omnisc Inv ...	12.05	—	12.05	05/30/2023	Larry Swain	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2098072	00005-Marvin Inc. Omnisc Inv ...	12.05	—	12.05	05/26/2023	Larry Swain	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2086516	00064-QA_QA	445.25	—	445.25	04/14/2023	QA TEAM	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 208426...	00001-DevMatterJT_DevMat ...	12.11	—	12.11	04/06/2023	QA TEAM	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2084061	00001-DevMatterJT_DevMat ...	12.20	—	12.20	04/05/2023	Andy E	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2080402	00001-DevMatterJT_DevMat ...	26.70	—	26.70	03/28/2023	Andy E	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2080402	00001-DevMatterJT_DevMat ...	50.25	—	50.25	03/28/2023	Andy E	Unbilled

2. To assign expenses to the appropriate expense category, simply scroll to the expense you would like to alter and click on the “edit” button in its row.



Actions	Type	Qty	Description	Matter	Rate (\$)	Non-billable...	Billable (\$)	Date	User	Invoice status
Edit	\$	1.00	Rapid Legal Invoice# 2099108	00005-Marvin Inc. Omnib Inv...	12.05	—	12.05	05/30/2023	Larry Swain	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2098072	00005-Marvin Inc. Omnib Inv...	12.05	—	12.05	05/26/2023	Larry Swain	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2086516	00064-QA_QA	445.25	—	445.25	04/14/2023	QA TEAM	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 208426...	00001-DevMatterJT_DevMat...	12.11	—	12.11	04/06/2023	QA TEAM	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2084061	00001-DevMatterJT_DevMat...	12.20	—	12.20	04/05/2023	Andy E	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2080402	00001-DevMatterJT_DevMat...	26.70	—	26.70	03/28/2023	Andy E	Unbilled
Edit	\$	1.00	Rapid Legal Invoice# 2080402	00001-DevMatterJT_DevMat...	50.25	—	50.25	03/28/2023	Andy E	Unbilled
							\$570.61			

3. Once you've clicked on the matter's "edit" button, you may select an expense category for that matter.



Edit expense entry

Expense category

Quantity: 1.00 Rate: \$ 12.05 Required: Total amount: \$ 12.05

Non-billable Show this entry on the bill

Description: Rapid Legal Invoice# 2102670

Matter: 00005-Marvin Inc

Date: 06/12/2023

Firm user: Larry Swain

[Save entry](#) [Save and create another](#) [Save and duplicate](#) [Cancel](#) [Delete](#)

Frequently Asked Questions

4. How do I connect to my Clio account?

- a. Click "Place Order" and start an eFiling order. When you arrive at the "Documents" tab, select a Document Type, and click the "Browse" button. You will see the option to select "Clio," select this option and a pop-up window will open where you enter your Clio credentials and establish the connection.

5. Do I have to enter my Clio credentials every time I submit a new eFiling order?

- a. The length of time that the connection between LegalConnect and Clio stays active is primarily dependent on Clio. If you submit a second eFiling order immediately after the first one you likely will not have to re-enter your Clio credentials. However, longer time periods may require you to allow the connection again. If your Clio credentials are saved by your browser this will make the process quicker as they will automatically populate in the connection pop-up window.

6. Does the email address in my Rapid Legal account need to match the email address in my Clio account?

- a. No. Your Clio email and password do not need to match your Rapid Legal email and password. If your Clio credentials are valid the connection will be established.

7. Can I upload more than 1 document from Clio to Rapid Legal in an eFiling order?

- a. Yes. Multiple documents can be loaded into Rapid Legal from Clio in the same way that you are able to upload multiple documents from your local computer.

8. What types of files are supported by the integration? Will Rapid Legal convert my Microsoft Word files to PDF?

- a. All document types currently supported by Rapid Legal for upload from your local computer are also supported for upload from Clio including PDF, MS Word, Rich Text Files, and many others. Any file that is not a PDF will be automatically converted to PDF by Rapid Legal before being submitted to the court.