Data Migration Process in Clio Manage

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Our Aim

Data Migration can seem daunting at first glance. Our aim is to take the fear out of this process and give you both clarity and understanding so the process feels like any other everyday task.

In this guide, you will learn about our process of migrating your firm's data from your previous practice management software into Clio Manage. You will learn what can and cannot be migrated, what the data migration process generally looks like, and how to prepare your data for import into Clio Manage.

Some key points to note before we begin:

Please ensure active user names in Clio match your current software, otherwise the users will be imported as deactivated users.

- Ensure data is linked to **active users**, where applicable.

Notify your **Migration Specialis**t of any customization requests (e.g. custom field types).

- We are happy to customize your migration as needed. However depending on the scope, the initial migration timelines may be longer to ensure we capture and apply the appropriate customization.

Overview of the data migration process

The data migration process involves **several key steps** to ensure a smooth transition of your data into Clio Manage.

It is important to note, once you export data from the previous system, any data entered into the previous system **will not** be captured in Clio.

Step 1: Consultation

We start with a **consultation** call for firms with complex data or questions about the migration process. During your consultation, you will discuss your migration plan, review data limitations, establish timelines, and confirm the selection of the correct migration options for your needs. This is a **strategic planning** session.

Step 2: Data export

After planning your migration, you can **export** your data in one of two ways:

Guided export: Our team will **schedule a separate export call**. During this call, our team will provide live, step-by-step guidance as you export data from your practice management software.

Self-serve export: You can self-serve your data export using resources in the Help Center for popular programs. This approach removes the need to schedule an export call and can speed up the migration process.

Step 3: Data processing

Once we receive your data export, our experts convert it into a format compatible with Clio Manage imports. The time required depends on the size and complexity of the data. A team member will contact you to set and meet reasonable expectations.

Step 4: Data import and review

After the data is processed, we will work with you to import it into your Clio Manage account. Once the import is complete, you have **three** business days to review the data in your account and assess its accuracy. Please notify us immediately if any corrections are needed.

Please note: **Do not** modify the imported data during the three-day review period to prevent potential data loss if the import requires reversion for corrections. Further, it is essential that you **do not enable any Clio integrations** until the review period is complete.

What can and cannot be migrated

The following information outlines data that our Data Migrations Team can and cannot migrate to Clio Manage as part of your one complimentary migration.

Please note: additional restrictions or exceptions may apply depending on the software system you are migrating from. Please discuss any queries you may have with your Data Migration Specialist

Migratable data

- **Contacts**
- **Matters**
- **Related Contacts**
- **Tasks**
- **Notes**
- **Calendars**
- **Emails**
- **Phone Logs**
- **Unbilled Activities:** Only unbilled activities migrate.
- **A/R Balances:** A single line item representing the summative balance at the time of export for a Matter will be migrated.
- **Trust Balances:** A single line item representing the summative balance at the time of export for a Matter will be migrated.
- **Documents:** Document migrations require scoping for feasibility and may be subject to an extra fee based on size.

Non-migratable data

- **Accounting and financial history:** This includes trust account transactions, trust account requests, trust account payments, operating account transactions, invoices, A/R ledgers, bill payments, and historical bills. None of these will be migrated.
- **Billable Rates:** For example, User Rate, Client Rate, Matter Rate.
- **Reports**
- **User permissions**
- **Settings**

Prepare your data for migration

Clio's Migrations team **will not clean your data or remove duplicate data**. Review your data before the Export call with the Clio Migrations team. If the data was **wrongly entered in the previous system,** it will appear in Clio in that format. This list details key areas you should look for in your data.

Your Data Migration Specialist will endeavour to run through this detail with you at the time of your Export call. Prior to this call, it would be beneficial to the quality of your migration for you to check the below key areas in your source data to make sure they exist, have relevant information and arfe in a state fit for migration.

Contacts:
Verify that the proper data is in the right column. For example, phone numbers should not be in an email address field.

Matters:
The Matter Description should not be blank, otherwise your matter will be assigned a description during the import. Matters should have an assigned client, otherwise matters will be assigned to an unknown client during the import process.

Activities:
Time entries need an assigned user, otherwise they will not import. If you would like to import data for a user that will not be added to the Clio account, your Migrations representative can help you with this.

Calendar events:
We highly recommend making sure that your events have exported correctly by picking four or five events in the past and in the future to make sure court dates and scheduled meetings are all included.

Contact notes:
Contact notes will not import without a contact or company name.

Matter notes:
Matter notes will not import without a matter number.

Related contacts:
Each related contact requires a matter.

Tasks:
Tasks must have an assigned user. If your tasks do not have an assigned user, you can choose to remove them from the data set. You can also confirm this with your Migrations representative and they can remove this information.

Balances forward (outstanding balances):
It is very important to make sure that you review the balances that were exported from your previous system to make sure they are the correct value. If there are multiple columns with outstanding amounts, identify which amount is to be imported and inform your Migrations representative.

Manage your Firm Data During Migration

Once your export is scheduled with a Clio data migrations specialist, **set a cut-off time for your firm.** Any data **added** to your previous software **after the export session** will **not be migrated** to Clio and will need to be manually transferred after the migration has been completed. Additionally, you can follow the steps below to manage your firm during the data migration transition period. Once migration is complete, refer to Manage your account data after migration on the next page.

Step 1: Close out your data in your old software

- Generate bills for any outstanding time and expense entries in your previous software to obtain the most up-to-date outstanding balances for your clients.
- Apply credits and trust payments to outstanding bills in your previous software. Credits balances will not be migrated.
- Export historical banking and trust reports that you want to keep hold of as these will not migration to Clio..

Step 2: Manage your firm data during the transition period

- Do not turn on contact or calendar syncs until after the migration has been completed in order to reduce the possibility of duplicate contacts being created.
- Do not turn on any integrations before the migration process is complete.
- Add new clients, matters, time entries, and all other data in Clio.
- Track activities for your historical clients in one of two ways:
    - Placeholder matter: This is a temporary matter that you can add time to while waiting for a data migration to complete. Once your migration is complete and you have confirmed that the data is free of errors, an administrator can move the time entries in bulk from the placeholder matter to the respective matters.
        - Create a new company contact with your firm's name.
        - Create a new matter for this contact. Enter "Placeholder—Migrations" for the matter's Description.
        - Add time entries and use the Description field to specify which matter the time entry belongs to.
        - Repeat step 3 for all time entries incurred during the data migration process.
        - Once migration has been completed, move the time entries in bulk to their respective matters.
    - Import templates: Use Clio's migration import templates to track activities and matter notes. Then, upload the spreadsheet data into Clio and link the time and expense entries and matter notes to their respective matters.
- Upload reports that you exported from your previous system into Clio under the Documents tab. You can create a folder called "Historical data" for future reference. Learn more about creating folders and uploading documents here.
- Get started with Clio's Quick Start training webinars.

Manage your Account Data After Migration

Once your data migration is complete, and before you begin using Clio normally, you will need to go through the steps listed below.

Please note no data amendments or adjustments can be made until the **migration is completed and the data is reviewed by you**. Manual edits will complicate our ability to correct any data as needed.

Step 1: Review your imported data for accuracy within three business days of the import's completion

- **Contacts:** Choose five contacts and check that their addresses, phone numbers, and email addresses are correct.
- **Matters:** Choose a mix of 5-10 open and closed matters and verify that each has the appropriate client assigned, the correct matter number, the appropriate responsible attorney (if applicable), and any requested custom fields.
- **Unbilled time and expense activities and accounts receivable balances:** Choose 20 entries and review the rate or price assigned to each entry, the total value of the entry, and that the entry is assigned to the correct user and matter.
- **Calendar:** Choose a mix of 20-30 past and future calendar entries and check that the date and time values are correct and that each event is assigned to the appropriate calendar. Migrated time entries only include the user that the calendar entry is assigned to, not any invited users.
- **Tasks:** Choose a mix of 10-20 past and future tasks that you know are coming up soon, such as filing deadlines. Once selected, check that the task name, due date (if assigned), and task assignee are correct.
- **Contact and matter notes:** Choose 2-3 contact and matter notes and check that they are connected to the correct contact and/or matter. Learn more about how to find contact notes here and how to find matter notes here.
- **Related contacts:** Choose 5-10 matters and verify that the contact's name is correct and that their relationship between the matter and contact is correctly labeled. Learn more about finding related contacts here.

Step 2: Upload the data from the transition period that you tracked to a placeholder matter or for which you used import templates

If you created a placeholder matter to add time to while you were waiting for the data migration to complete, or if you tracked activities and matter notes using a Clio spreadsheet, upload this data into Clio Manage. Learn more about importing activities here and matter notes here.

Step 3: Process accounts receivable (outstanding) balances

After migration, outstanding balances appear as draft bills in Clio Manage. Each of these draft bills consists of a single time entry with outstanding balances for a specific matter. Since each matter's draft bill only contains one time entry, you will not be able to view details of all time and expense activities associated with a previous invoice. You can process the outstanding balances and apply payments by following the steps below:

- Add operating and trust accounts. Learn more about adding bank accounts here.
- Add transactions to each matter's Transactions subtab. Learn more about sending trust requests to clients for payment here and recording trust payment transactions without generating trust requests here.
- Make any necessary changes to each draft bill, including reviewing all outstanding balances for accuracy, then approve the bill for payment, or approve and apply trust funds to the bill. Learn more about editing draft bills here, approving bills here, and approving and applying trust funds to bills here.
    - Reviewing outstanding balances before approving bills is recommended to ensure that the outstanding balances are accurate.
- Optional: Provide your clients with printed copies of their bills. Learn more about downloading and printing bills here.