



evolve VOUCHER

Exporting from Clio

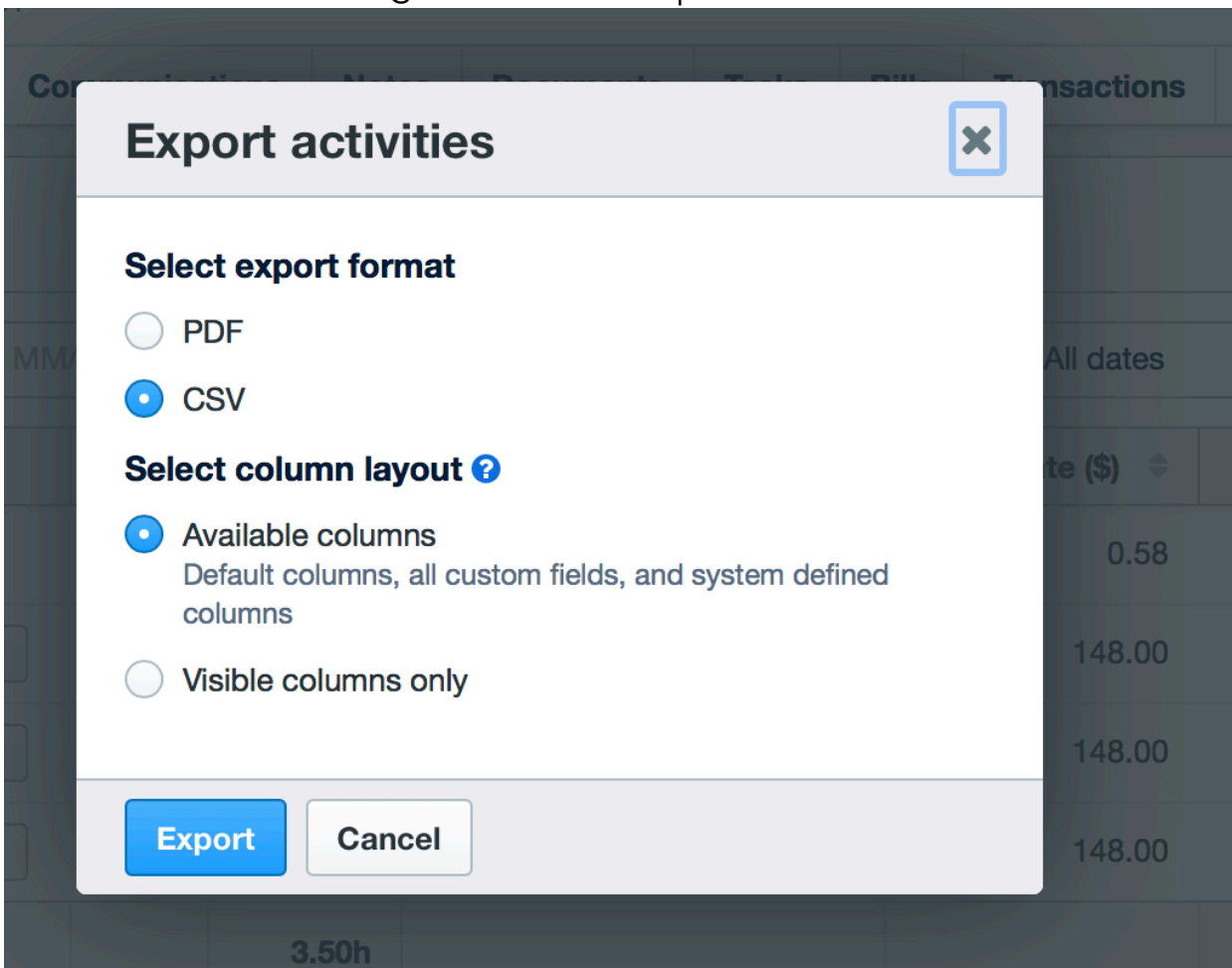
Click on your matter

The screenshot shows the Clio interface for the 'Matters' section. At the top, there is a search bar for 'Law Office of Laurie Shertz' and a 'Recents' dropdown. Below the search bar is a sidebar with navigation options: Dashboard, Calendar, Tasks, Matters (highlighted), Contacts, Activities, Bills, Clio Payments, Accounts, Documents, and Communications. The main content area is titled 'Matters' and includes a 'New matter' button. A table lists matters with columns for Actions, Matter, Client, Responsible a..., Originating att..., Practice area, and Open date. The first row is selected, and a green arrow points to the matter name '00001-Galt: Federal District Court of Oregon...'. Below the table, there are controls for '1-1 of 1' results per page, '50' results per page, and an 'Export' button.

Then click on the activities tab, and click "export"

The screenshot shows the Clio interface for the 'Activities' section of matter '00001-Galt'. At the top, there is a search bar for 'Law Office of Laurie Shertz' and a 'Recents' dropdown. Below the search bar is a sidebar with navigation options: Dashboard, Calendar, Tasks, Matters (highlighted), Contacts, Activities, Bills, Clio Payments, Accounts, Documents, Communications, Reports, Integrations, Settings, and Help center. The main content area is titled '00001-Galt' and includes a 'Share' and 'Edit matter' button. Below the title is a tabbed interface with 'Dashboard', 'Activities' (highlighted with a green circle and a '1'), 'Calendar', 'Communications', 'Notes', 'Documents', 'Tasks', 'Bills', 'Transactions', and 'Clio Connect'. The 'Activities' tab is active, showing a table with columns for Actions, Type, Qty, Description, Rate (\$), Amount (\$), Date, User, and Invoice. The table contains four rows of activity entries. At the bottom of the table, there are controls for '1-4 of 4' results per page, '50' results per page, and an 'Export' button (highlighted with a green circle and a '2').

Then make the following selections in export



Once you're done & have uploaded your data to evolveVoucher & eVoucher, don't forget to bill the data so it comes out of your Clio & won't produce duplicates next time.