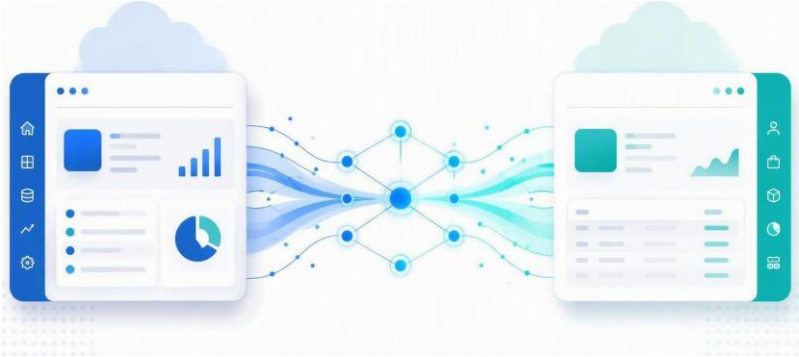
INTEGRATION OVERVIEW

Clio + Dynamics 365

Automated legal practice data in the Microsoft cloud — from Clio to Dataverse, and on to Business Central.



Prepared by d365.Global · July 2026

THE OPPORTUNITY

Two systems, one source of truth

01

Clio runs the front office

Matters are opened, time is captured, and clients are managed inside Clio every day.

02

Dynamics 365 runs the business

Cases, billing, resourcing and reporting live in Dynamics 365 and Dataverse.

03

The gap costs time

Without a bridge, teams re-key matters and time by hand — slow, error-prone and always out of date.

The integration closes that gap automatically — matters and time flow from Clio into Dynamics with no manual entry.

SOLUTION AT A GLANCE

Clio to Dataverse, automatically

When a matter or time entry is created in Clio, it syncs to Microsoft Dataverse in near real time — through lightweight Azure Functions, with no servers to manage.



3

serverless functions

do all the work — zero infrastructure to run

2

record types synced

Matters and billable time, fully mapped

0

manual re-keying

between Clio and Dynamics 365

HOW IT WORKS

An automated bridge on Azure

Clio webhooks fire on every new matter and time entry; a timer keeps the connection alive. Three Azure Functions handle the rest.

Matter Sync

`clio-webhook`

New and updated matters in Clio become Incident (Matter) records in Dataverse — with attorneys, client and practice area linked automatically.

Time Entry Sync

`clio-webhook-TimeEntries`

Billable time entries become Billing Event records, linked to the right matter, lawyer and activity codes.

Auto-Renewal

`renew-webhook`

Runs every 25 days to refresh security tokens and extend webhooks, so the connection never silently breaks.

Triggers: HTTP webhooks (matters, time) + timer schedule (renewal)

WHAT SYNCS

Rich, mapped data — not just a copy

Matter → Case

- Display number, description & status
- Open date and statute-of-limitations date
- Billing method and matter stage
- Responsible & originating attorney (linked)
- Practice area and client (linked)

Time entry → Billing Event

- Note, date (localised to AEST/AEDT)
- Billable hours and hourly rate
- Billable / non-billable flag
- Linked matter, lawyer & activity code
- UTBMS task code (e.g. L120)

Smart filtering: only billable time entries sync — expenses and non-billable activity are skipped, and the matter must already exist in Dataverse.

SECURITY & RELIABILITY

Secure and self-maintaining

Secrets in Key Vault

Client secrets are never stored in plain text — with a full audit trail and rotation without redeployment. Recommended for production legal data.

Verified ownership

A handshake with Clio confirms the endpoint when each webhook is registered — no spoofed events.

Never breaks silently

Auto-renewal refreshes tokens and extends webhooks every 25 days, ahead of Clio's 31-day expiry limit.

Least-privilege access

The Dataverse application user is granted only the table permissions it needs — nothing more.



BUSINESS VALUE

What the firm gains

Eliminate double entry

Time captured once in Clio flows straight into Dynamics 365.

Lower cost and risk

Serverless and pay-per-event, with secure, auditable access.

Faster, cleaner billing

Billable time lands as structured Billing Events, ready for finance.

Scales effortlessly

The consumption plan absorbs volume at negligible cost.

Always current

Matters and time appear in Dynamics in near real time.

Capture once. Report everywhere.

EXTENDING THE FOUNDATION

Extending to Dynamics 365 Business Central, BC4Legal



The same Dataverse foundation becomes the springboard from synced matters and billable time into end-to-end firm finance, Dynamics 365 Business Central, BC4Legal.

CLIO → DATAVERSE → BUSINESS CENTRAL

From billing events to invoices and finance

Clio → Dataverse → BC4Legal

Dataverse as the hub

Clio data already lands in Dataverse — and Business Central BC4Legal connects to Dataverse natively.

Billing events → invoices

Synced billable time can flow into BC4Legal as draft sales invoices and revenue.

Matters → jobs

Cases can be optionally mapped to BC4Legal jobs for cost, WIP and profitability tracking.

One financial picture

Unified reporting across legal practice management and the finance ledger.

Illustrative extension path — the documented integration delivers the Clio → Dataverse foundation this builds on.

ROADMAP

Getting started

01

Deploy the foundation

Stand up the Clio → Dataverse integration and its three Azure Functions.

02

Validate the sync

Confirm matters, time and lookups using the verification checklist.

03

Harden for production

Move client secrets to Azure Key Vault before go-live.

04

Extend to Business Central, BC4Legal

Connect Dataverse to Business Central BC4Legal for invoicing and finance.

Ready to connect Clio and Dynamics 365? d365.Global · July 2026