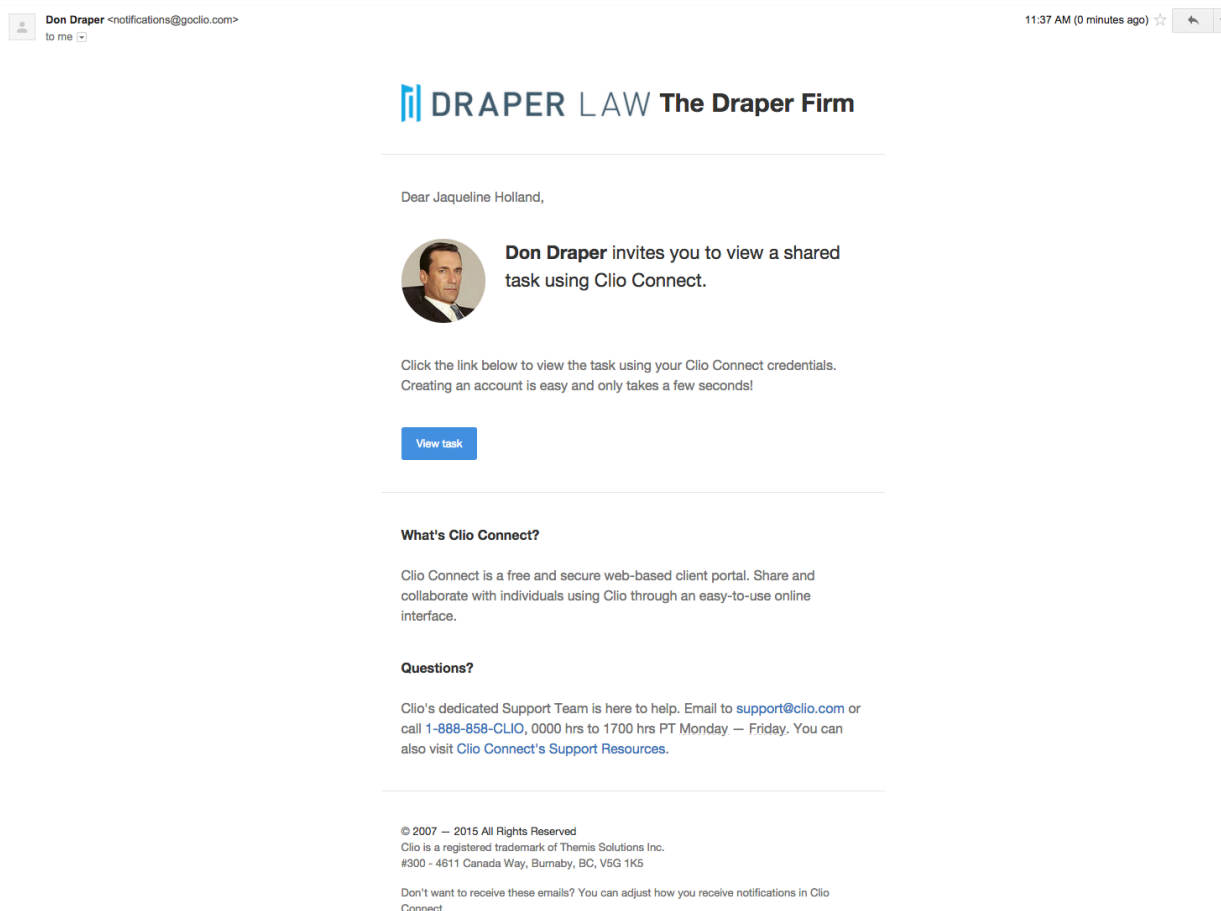


# Clio 101

## Creating a Clio Connect Account

You will receive an email every time our firm shares something with you via Clio Connect. It is not recommended that this email be shared with anyone else. Sharing the email with a different address will break the connection, and a Clio Connect account will not be able to be created. The email will look like this:



If this is the first time our firm shares a resource with you, when you click on the first link you will be brought to this page where you can fill in your information:

The screenshot shows the Clio Connect sign-up interface. At the top, it says 'DRAPER LAW' and 'The Draper Firm'. Below this, a message states: 'Don Draper has shared a task with you using Clio Connect. To access this task you must first set up your free account.' The form includes fields for 'Name' (Jane), 'Last Name' (Holland), 'Email' (janeholland@gmail.com), and 'Password'. The password field is highlighted with a blue border, and a red arrow points to it from the text on the right. To the right of the password field, there are two buttons: 'Weak' (orange) and 'Match' (green). Below the password field, there is a time zone dropdown menu set to '(GMT-08:00) Pacific Time (US & Canada)'. At the bottom of the form, there is a blue 'SIGN UP' button. Below the button, there is a link to 'Terms of Service, Privacy Policy, and Refund Policy'.

DRAPER LAW

**The Draper Firm**

Don Draper has shared a task with you using Clio Connect. To access this task you must first set up your free account.

Name: Jane Last Name: Holland

Email: janeholland@gmail.com

Password: ..... Weak Match

(GMT-08:00) Pacific Time (US & Canada)

By clicking Sign Up, you agree to our [Terms of Service](#), [Privacy Policy](#), and [Refund Policy](#).

**SIGN UP**

Clio uses industry-standard 256-bit SSL security. [Learn more about our security.](#)

Ensure all information is accurate. **Please select the correct Time Zone or your calendar will be incorrect.** Then, select "Sign Up."

**Then sign in with your email and password.** Please select a secure unused password to secure your account.

You can always return to Clio Connect, even when no new resource has been shared, by logging in at [app.clio.com](https://app.clio.com).

## Updating Information in Clio:

Clients can update their information including adding their own profile picture, at any time.

1. Click on the gear wheel to access Settings at the top right of Clio Connect
2. Update your information and add your profile picture as needed, then click "Update Information."
3. To add a photo, simply click on "Edit Picture" as above, then click on 'Choose File' to locate the picture file from your computer and Upload. Accepted profile picture formats are JPEG, PNG or GIF. Profile pictures should not exceed 2MB in size.

## Viewing your Documents

Documents will be shared with you frequently. You can view all shared documents at any time in Clio Connect by clicking on the **Documents** tab. Documents will also appear on the **Dashboard** tab of Clio.

List Documents

All Files


NEW

DOWNLOAD

VIEW DETAILS

☐ Select All

Switch to file view

	Description	Matter	Category	Received Date	Last Edit	Author	#
<input type="checkbox"/>	<div>  Court Documents Shared </div> <div> <a href="#">View details</a> <a href="#">Download</a> </div>	<a href="#">00126-Watson/Watson v. Watson</a>			1/13/2015	<a href="#">Roger Sterling</a>	
<input type="checkbox"/>	<div>  Forms Shared </div> <div> <a href="#">View details</a> <a href="#">Download</a> </div>	<a href="#">00151-Watson/Custody</a>			11/6/2014	<a href="#">Roger Sterling</a>	
<input type="checkbox"/>	<div>  Agreement.png Shared </div> <div> <a href="#">View details</a> <a href="#">Add Time</a> </div>	<a href="#">00004-Menken/Real Estate/2013</a>		3/12/2015	3/16/2015	<a href="#">Rachel Menken</a>	702

Downloading Folders

You have a number of options for downloading folders (including all files and sub folders contained therein).

Individual Folder Download: To download an individual folder and all contents as a Zip file:

1. Click the "Download" quick link; or

List Documents

All Files

NEW

DOWNLOAD

VIEW DETAILS



☐ Select All

Switch to file view

	Description	Matter	Category	Received Date	Last Edit	Author	#
<input type="checkbox"/>	<div>  Court Documents Shared </div> <div> <a href="#">View details</a> <a href="#">Download</a> </div>	<a href="#">00126-Watson/Watson v. Watson</a>			1/13/2015	<a href="#">Roger Sterling</a>	

2. Click on the folder to open it then click on the "Download" button.

#### List Documents

All Files > Court Documents <span>Shared</span>							<span>NEW</span> <span>DOWNLOAD</span> <span>VIEW DETAILS</span>	
<input type="checkbox"/> <span>Select All</span>							<span>Switch to file view</span>	
Description	Matter	Category	Received Date	Last Edit	Author	#		
<input type="checkbox"/>  <a href="#">Case Notes.pdf</a> <span>Shared</span> <a href="#">View details</a> <a href="#">Add Time</a> <a href="#">Preview</a>	<a href="#">00126-Watson/Watson v. Watson/2014</a>		9/18/2014	10/28/2014	<a href="#">Rachel Menken</a>	<a href="#">285</a>		
<input type="checkbox"/>  <a href="#">Court Document.pdf</a> <a href="#">View details</a> <a href="#">Add Time</a> <a href="#">Preview</a>	<a href="#">00126-Watson/Watson v. Watson/2014</a>		9/18/2014	10/20/2014	<a href="#">Rachel Menken</a>	<a href="#">284</a>		

Batch Download: To select multiple folders for download to a single Zip file, check the boxes beside each of the folders you would like to download then select "Download" from the "Actions" dropdown.

#### List Documents

All Files

NEW

DOWNLOAD

VIEW DETAILS

☐

Select All

ACTIONS

Download

Switch to file view

Descript	Matter	Category	Received Date	Last Edit	Author	#
<input checked="" type="checkbox"/> <div> <div> <div>Folder</div> <div>Court Documents</div> <div>Shared</div> </div> <div> <div>View details</div> <div>Download</div> </div> </div>	00126-Watson/Watson v. Watson			1/13/2015	Roger Sterling	
<input checked="" type="checkbox"/> <div> <div> <div>Folder</div> <div>Forms</div> <div>Shared</div> </div> <div> <div>View details</div> <div>Download</div> </div> </div>	00151-Watson/Custody			11/6/2014	Roger Sterling	
<input type="checkbox"/> <div> <div> <div>Image</div> <div>Agreement.png</div> <div>Shared</div> </div> <div> <div>View details</div> <div>Add Time</div> </div> </div>	00004-Menken/Real Estate/2013		3/12/2015	3/16/2015	Rachel Menken	702

## Downloading Individual Files

To download a file, click on the file name.

## List Documents

All Files > Court Documents <span>Shared</span>							<a href="#">NEW</a> <a href="#">DOWNLOAD</a> <a href="#">VIEW DETAILS &gt;</a>	
<input type="checkbox"/>	<a href="#">Select All</a>						<a href="#">Switch to file view</a>	
	Description	Matter	Category	Received Date	Last Edit	Author	#	
<input type="checkbox"/>	<a href="#">Case Notes.pdf</a> <span>Shared</span>	<a href="#">00126-Watson/Watson v. Watson/2014</a>		9/18/2014	10/28/2014	<a href="#">Rachel Menken</a>	<a href="#">285</a>	<a href="#">View details</a> <a href="#">Add Time</a> <a href="#">Preview</a>
<input type="checkbox"/>	<a href="#">Court Document.pdf</a>	<a href="#">00126-Watson/Watson v. Watson/2014</a>		9/18/2014	10/20/2014	<a href="#">Rachel Menken</a>	<a href="#">284</a>	<a href="#">View details</a> <a href="#">Add Time</a> <a href="#">Preview</a>

To download multiple files, check the boxes beside each of the files you would like to download then select "Download" from the "Actions" dropdown.

## List Documents

All Files > Court Documents <span>Shared</span>							<a href="#">NEW</a> <a href="#">DOWNLOAD</a> <a href="#">VIEW DETAILS &gt;</a>	
<input checked="" type="checkbox"/>	<a href="#">Select All</a>						<a href="#">Switch to file view</a>	
	<b>ACTIONS</b>							
	<a href="#">Download</a>							
	Description	Matter	Category	Received Date	Last Edit	Author	#	
<input checked="" type="checkbox"/>	<a href="#">Case Notes.pdf</a> <span>Shared</span>	<a href="#">00126-Watson/Watson v. Watson/2014</a>		9/18/2014	10/28/2014	<a href="#">Rachel Menken</a>	<a href="#">285</a>	<a href="#">View details</a> <a href="#">Add Time</a> <a href="#">Preview</a>
<input checked="" type="checkbox"/>	<a href="#">Court Document.pdf</a>	<a href="#">00126-Watson/Watson v. Watson/2014</a>		9/18/2014	10/20/2014	<a href="#">Rachel Menken</a>	<a href="#">284</a>	<a href="#">View details</a> <a href="#">Add Time</a> <a href="#">Preview</a>

## Uploading a File or Folder

Folder Upload: Navigate to the folder that you would like to upload the folder to (including all files contained in the folder) then click on the "new" button and select "Folder Upload."

## List Documents

**All Files**

☐ [Select All](#)

NEW ^

DOWNLOAD

VIEW DETAILS >

File upload

Folder upload

Switch to file view

Description	Matter	Category	Received Date	Last Edit	Author	#
<input type="checkbox"/> <a href="#">Court Documents</a> <span>Shared</span> <a href="#">View details</a> <a href="#">Download</a>	<a href="#">00126-Watson/Watson v. Watson</a>			1/13/2015	<a href="#">Roger Sterling</a>	
<input type="checkbox"/> <a href="#">Forms</a> <span>Shared</span> <a href="#">View details</a> <a href="#">Download</a>	<a href="#">00151-Watson/Custody</a>			11/6/2014	<a href="#">Roger Sterling</a>	

In the "Browse for Folder" pop-up window, select the folder that you want to upload then click "OK". The folder and all content files will then begin to upload. The time required for the upload will depend on the number and size of the files that you are trying to upload. **Please note: Folder upload is only available with Google Chrome.**

**File Upload:** To upload an individual or multiple files, navigate to the folder that you would like to upload the file(s) to then click on the "New" button and select "File upload." Locate the file(s) you would like to upload and click "Open." You can select multiple files by holding the CTRL key while selecting them. Note that you are limited to uploading individual files of no more than 1 gigabyte.

## Working with Secure Messages in Clio Connect

Clio allows a law firm to send Secure Messages (or "Communications") to clients protecting valuable and confidential information. **Why are Clio Connect communications better than email?** Clio's communications are more secure than conventional email:

1. Secure Messages require a password to read
2. Secure Messages are protected using 256 SSL encryption
3. Secure Messages don't leave Clio's secure servers

Additionally, Secure Messages allow us to all communications in one place.

## Reading your unread messages

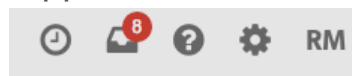
You can read a Secure Message at any time in Clio Connect by clicking on the **Communications** tab. To view the full message click on the message link.

DashboardCalendarTasksMattersActivitiesDocumentsBillsCommunications

InboxADD

Received At	Reference	From	To	Subject		Message
03/12/2015 02:25 PM	00004-Menken/Real Estate/2013	Don Draper	Me	Review agreement	(3 Messages)	Archiving this message.
<a href="#">Print</a> <a href="#">View message</a>						
01/13/2015 01:43 PM UNREAD	00181-Miller/Immigration/2015	Me	Roger Sterling	Court Date	(2 Messages)	Will call on Monday.
<a href="#">Print</a> <a href="#">View message</a>						

The message inbox can also be accessed by clicking on the Inbox icon from within the header. All unread messages will appear in a red circle.



## Replying to a message

You can reply to a Secure Message by:

1. Clicking the "Reply" button (on the message detail screen)
2. Type a message in the "Add Message Communication" window
3. Optionally attach a document
4. Click "Send Reply"

Dashboard	Calendar	Tasks	Matters	Activities	Documents	Bills	Communications
Court Date							
Message Detail							
Matter		00181-Miller/Immigration/2015					
Parties		<a href="#">Me</a> , Roger Sterling					
Messages							REPLY
Received At	From		Message				
01/13/2015 01:43 PM	Me		Will call on Monday.				
01/13/2015 01:36 PM	Roger Sterling		Client has concerns about date. Please call me.				

## Add Message Communication



From

Rachel Menken

Reply

required

+ Attach a document

**Send Reply** or Cancel

## Sending a new message

To send a new Secure Message using Clio Connect:

1. Click on the Communications tab
2. Click the "Add" button
3. Optionally assign a Matter reference
4. Specify the recipient, the subject and the body
5. Optionally attach a document
6. Click "Send Message"

The screenshot shows the Clio Connect interface with the 'Communications' tab selected. An 'Inbox' table lists several messages. A modal window titled 'Add Message Communication' is open, showing the following fields:

- Matter:** 00151-Watson/Custody/2014: Custody
- From:** Rachel Menken
- To:** Don Draper x (marked as required)
- Subject:** Request for Information (marked as required)
- Body:** Hi Don  
I wanted to check in to see if there was any new information on this Matter. Rachel (marked as required)

Below the body field, there is a '+ Attach a document' link and a 'Send Message or Cancel' button. An arrow points to the 'ADD' button in the top right corner of the Communications tab.



## Printing your messages

To print a secure message click on the "Print" quick link for that message.

Inbox						ADD
Received At	Reference	From	To	Subject	Message	
03/16/2015 03:49 PM UNREAD	<a href="#">00151-Watson/Custody/2014</a>	Me	Don Draper	Request for Information ( <a href="#">1 Message</a> )	Hi Don ( <a href="#">more</a> )	
Add Time <b>Print</b> View message						

## Working with Calendars

Clio allows law firms to invite people outside of their firms to events using Clio Connect.

### Viewing your calendar entries

You can view your calendar entries at any time in Clio Connect by clicking on the **Calendar** tab.

Dashboard	Calendar	Tasks	Matters	Activities	Documents	Bills	Communications																																																																								
Calendar Entries																																																																															
<div>◀ ▶ Today 29 Mar 2015 – 4 Apr 2015 Agenda Day Week Month Year</div> <table><tr><th></th><th>Sun, March 29</th><th>Mon, March 30</th><th>Tue, March 31</th><th>Wed, April 1</th><th>Thu, April 2</th><th>Fri, April 3</th><th>Sat, April 4</th></tr><tr><td>⌚</td><td colspan="7">Reminder: Parties to Exchange Lists of Exhibits prior to</td></tr><tr><td>06:00 AM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>07:00 AM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>08:00 AM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>09:00 AM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>10:00 AM</td><td></td><td></td><td>10:00 - 12:00 Matter Review</td><td></td><td></td><td></td><td></td></tr><tr><td>11:00 AM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>12:00 PM</td><td></td><td></td><td></td><td></td><td></td><td>12:00 - 01:00 Final Pretrial Conference</td><td></td></tr></table>									Sun, March 29	Mon, March 30	Tue, March 31	Wed, April 1	Thu, April 2	Fri, April 3	Sat, April 4	⌚	Reminder: Parties to Exchange Lists of Exhibits prior to							06:00 AM								07:00 AM								08:00 AM								09:00 AM								10:00 AM			10:00 - 12:00 Matter Review					11:00 AM								12:00 PM						12:00 - 01:00 Final Pretrial Conference	
	Sun, March 29	Mon, March 30	Tue, March 31	Wed, April 1	Thu, April 2	Fri, April 3	Sat, April 4																																																																								
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10:00 AM			10:00 - 12:00 Matter Review																																																																												
11:00 AM																																																																															
12:00 PM						12:00 - 01:00 Final Pretrial Conference																																																																									

When in the Calendar tab you can switch between different calendar views (Agenda, Day, Week, Month or Year) by clicking on the tabs on the right hand side of the Calendar. You can skip between dates using the arrow buttons on the left hand side of the Calendar.

You can view the full details of a calendar entry by clicking on it.

View Calendar Entry

General Information

Repeats

Summary

required

Final Pretrial Conference

Calendar owner

Court Calendaring

When

04/03/2015

12:00 PM

to

04/03/2015

01:00 PM

☐ This event will last the whole day

Matter

00126-Watson/Watson v. Watson/2014

Location

Minnesota District Court 1ST Judicial Distric

Attendees

The Draper Firm

Don Draper Joan Harris Peggy Olson

Contacts

Rachel Menken

Description

Prior 0 Day(s). Adjustment: Do Nothing.  
TRIGGER 842.1  
Trigger Date Entered by User.

Close Window

## Working with Tasks

Clio allows law firms to assign tasks to people outside of their firm via Clio Connect.

## Viewing your Tasks

You can view your Tasks at any time in Clio Connect by clicking on the **Tasks** tab.

DashboardCalendarTasksMattersActivitiesDocumentsBillsCommunications

UpcomingCompletedEXPORT

AllDue This WeekDue TodayDue TomorrowOverdue

☐ Select All

Date ▾	Task	Priority	Reference
Today			
<input type="checkbox"/> 03/16/2015	<b>HIGH</b> Review Draft Agreement Assigned to <u>Rachel Menken</u> by Don Draper	High	<u>00151-Watson/Custody/2014</u>
<a href="#">Mark as Complete</a> <a href="#">Add Time</a>			
Upcoming			
<input type="checkbox"/> 03/26/2015	Prep Forms for Filing Assigned to <u>Rachel Menken</u> by Don Draper	Normal	<u>00151-Watson/Custody/2014</u>
<a href="#">Mark as Complete</a> <a href="#">Add Time</a>			

Clio will show you how many unfinished Tasks you have in the Tasks tab. If there is no number you're all caught up.

## Completing a Task

To complete a Task click on the "Mark as Complete" quick link below the task name. Once a Task is complete it will disappear from the Upcoming Tasks page.

UpcomingCompleted

AllDue This WeekDue TodayDue TomorrowOverdue

☐ Select All

Date ▾	Task	Priority	Reference
Today			
<input type="checkbox"/> 03/16/2015	<b>HIGH</b> Review Draft Agreement Assigned to <u>Rachel Menken</u> by Don Draper	High	<u>00151-Watson/Custody/2014</u>
<a href="#">Mark as Complete</a> <a href="#">Add Time</a>			
Upcoming			
<input type="checkbox"/> 03/26/2015	Prep Forms for Filing Assigned to <u>Rachel Menken</u> by Don Draper	Normal	<u>00151-Watson/Custody/2014</u>
<a href="#">Mark as Complete</a> <a href="#">Add Time</a>			

## Viewing Tasks you have completed

You can view a list of Tasks you've completed by clicking on the "Completed" sub-tab. On the Completed Tasks page you can click on "Mark as Incomplete" to put the Task back in Upcoming.

Upcoming **Completed**

All Due This Week Due Today Due Tomorrow Overdue

☐ [Select All](#)

Date ▾	Task	Priority	Reference
<input type="checkbox"/> 04/17/2014	Review Real Estate Paperwork Assigned to <a href="#">Rachel Menken</a> by Don Draper	Normal	<a href="#">00004-Menken/Real Estate/2013</a>
<a href="#">Mark as Incomplete</a>			
<input type="checkbox"/> 05/13/2014	Review paperwork Assigned to <a href="#">Rachel Menken</a> by Don Draper	Normal	<a href="#">00004-Menken/Real Estate/2013</a>
<a href="#">Mark as Incomplete</a>			