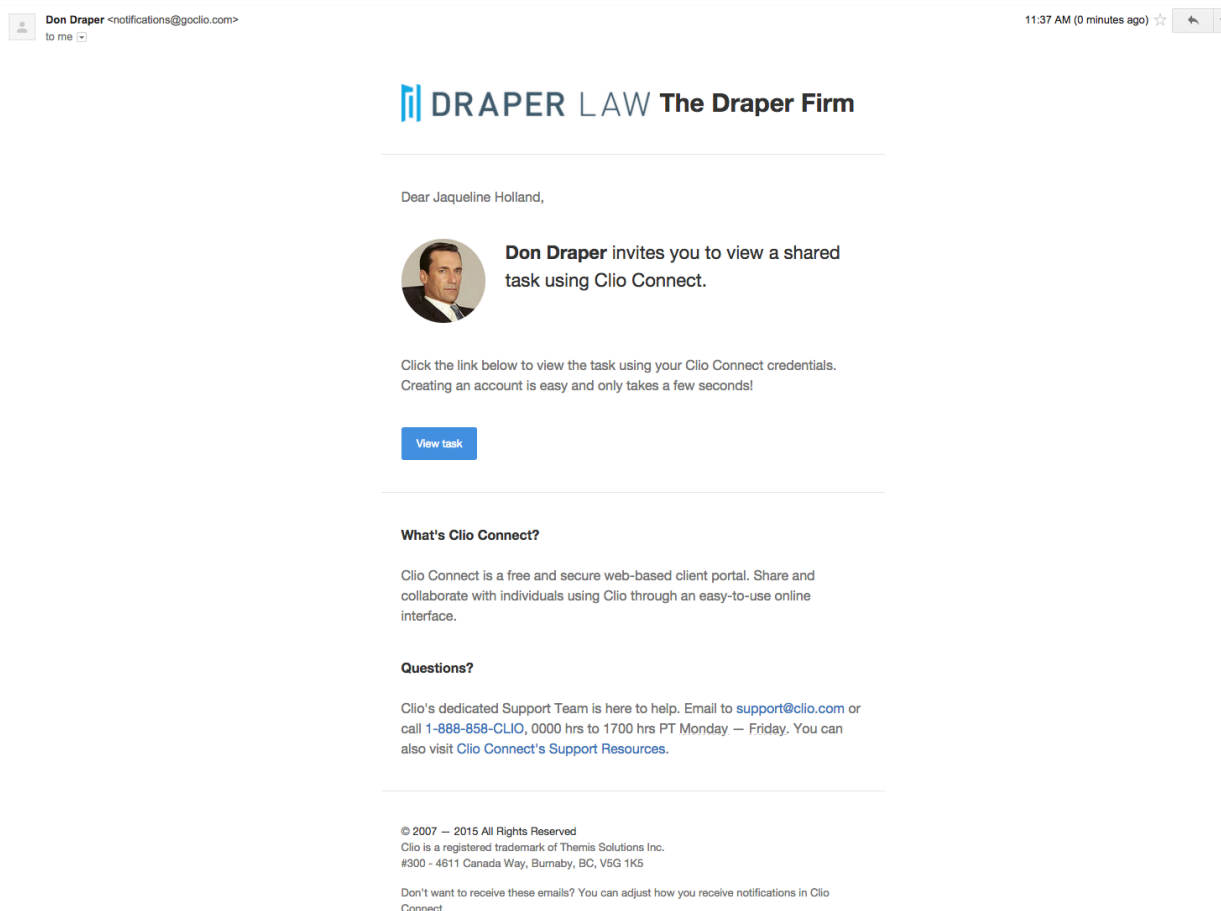# Clio 101

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:

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.

Jane	Holland

janeholland@gmail.com

| •••••••••• | 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.

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.

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

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

List Documents

All Files > **Court Documents** Shared					NEW ▾	**DOWNLOAD**	VIEW DETAILS ❯

☐ Select All						☰ Switch to file view	
Description	**Matter**	**Category**	**Received Date**	**Last Edit**	**Author**	**#**
☐ 📄 Case Notes.pdf Shared View details Add Time Preview	00126-Watson/Watson v. Watson/2014		9/18/2014	10/28/2014	Rachel Menken	285
☐ 📄 Court Document.pdf View details Add Time Preview	00126-Watson/Watson v. Watson/2014		9/18/2014	10/20/2014	Rachel Menken	284

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** ▲						☰ Switch to file view	
Download							
Descrip	**Matter**	**Category**	**Received Date**	**Last Edit**	**Author**	**#**
☑ 📂 Court Documents Shared View details Download	00126-Watson/Watson v. Watson			1/13/2015	Roger Sterling	
☑ 📂 Forms Shared View details Download	00151-Watson/Custody			11/6/2014	Roger Sterling	
☐ 🖼 Agreement.png Shared View details Add Time	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 Shared   [NEW ▼] [DOWNLOAD] [VIEW DETAILS ❯]

☐ Select All   ☰ Switch to file view

	Description	Matter	Category	Received Date	Last Edit	Author	#
☐	Case Notes.pdf Shared View details Add Time Preview	00126-Watson/Watson v. Watson/2014		9/18/2014	10/28/2014	Rachel Menken	285
☐	Court Document.pdf View details Add Time Preview	00126-Watson/Watson v. Watson/2014		9/18/2014	10/20/2014	Rachel Menken	284

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 Shared   [NEW ▼] [DOWNLOAD] [VIEW DETAILS ❯]

☑ Select All   [ACTIONS ▲]   ☰ Switch to file view
              [Download]

	Description	Matter	Category	Received Date	Last Edit	Author	#
☑	Case Notes.pdf Shared View details Add Time Preview	00126-Watson/Watson v. Watson/2014		9/18/2014	10/28/2014	Rachel Menken	285
☑	Court Document.pdf View details Add Time Preview	00126-Watson/Watson v. Watson/2014		9/18/2014	10/20/2014	Rachel Menken	284

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

NEW ▲   DOWNLOAD   VIEW DETAILS ❯

File upload

Folder upload

☐ Select All

≣ Switch to file view

	Description	Matter	Category	Received Date	Last Edit	Author	#
☐	📂 Court Documents Shared View details Download	00126-Watson/Watson v. Watson			1/13/2015	Roger Sterling	
☐	📂 Forms Shared View details Download	00151-Watson/Custody			11/6/2014	Roger Sterling	

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.

Dashboard	Calendar	Tasks	Matters	Activities	Documents	Bills	Communications

Inbox   ADD

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.
Print View message						
01/13/2015 01:43 PM UNREAD	00181-Miller/Immigration/2015	Me	Roger Sterling	Court Date (2 Messages)		Will call on Monday.
Print View message						

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.
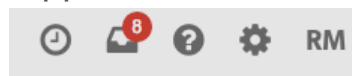
Replying to a message

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	Me, 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"

Printing your messages

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

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.

Your next five calendar entries will also appear on the **Dashboard** tab of Clio.

Viewing a calendar entry's details

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

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.

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.

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.