Clio QUICKSTART SESSIONS

Increasing Productivity and Staying on Schedule

Congratulations on finishing this Quick Start session!

Here's a quick summary of key highlights from the session, which covered setting up and syncing your calendars with Google or Microsoft Office, creating calendar events and using the Zoom integration, creating and assigning tasks and task lists, and managing workflows.



STAY ON TOP OF CALENDAR EVENTS

Clio's bi-directional syncs with Google, Microsoft, and Zoom make it easy to stay on schedule and track calendar events in platforms that are convenient for you, allowing you to stay on top of your meetings and firm events.



TRACK YOUR WORK WITH TASKS

Track what you need to do and check things off your to-do list with tasks, and use task lists to conveniently and quickly assign multiple actionable items for tasks that you work on most often. You can assign tasks and task lists to yourself, other firm users, or use Clio's secure co-counsel portal to assign tasks to outside counsel collaborating with you on a case.



MANAGE YOUR TO-DO LIST WITH WORKFLOWS

Clio Grow workflows and workflow templates are a convenient way for you to manage individual tasks and groups of actionable items, allowing you see what's been completed and what needs to be done. Customize workflow templates with tasks, emails, appointments, forms, and documents.

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ACCESS CLIO'S KNOWLEDGE BASE WHENEVER YOU NEED IT

Have questions or need help getting started? Visit our Help Center for in-depth articles and how-to videos.