Clio QUICKSTART SESSIONS

Streamline Client Intake Forms and Automate Documents with Clio

Congratulations on finishing Streamline Client Intake Forms and Automate Documents with Clio!

Here's a quick summary of key highlights from the session, which covered creating and syncing custom fields from Clio Manage to Clio Grow, building customizable intake forms, creating document templates, and sending prepared documents to collect esignatures.

CAPTURE UNIQUE INFORMATION WITH CUSTOM FIELDS

Custom fields are a convenient way to store information that is unique and essential to your firm's needs. Create custom fields in Clio Manage and sync them to Clio Grow to capture additional information in intake forms and documents.

CUSTOMIZE YOUR INTAKE PROCESS

Gather client information by creating customizable intake forms in the Clio Grow form builder. Forms can capture unique information with custom fields, be public or private, and be completed online by prospective clients through a secure link embedded on your website or sent by email.

AUTOMATE DOCUMENT PREPARATION

Quickly and efficiently draft documents used across multiple matters with document templates and custom merge fields. When you create documents from templates in Clio Grow, it's easy to send prepared documents to clients and co-counsel to collect electronic signatures from Clio Manage.

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.

Note: Custom fields are not available on the EasyStart plan in North America.