✓ **Clio** QUICKSTART SESSIONS

Start Using Clio Grow Today

Congratulations on finishing "Start Using Clio Grow Today!"

This session covered setting up and customizing Clio Grow, adding new contacts and matters on-the-go, gathering client information with online intake forms, electronically sending documents to clients for their e-signature, and converting matters to Clio Manage when you're ready to start generating and sharing bills.

CUSTOMIZE YOUR SETTINGS AND GET STARTED

Send client emails from your own email address, set up your email signature, customize how you see your contacts and matters, and import your existing contacts into Clio Grow from your Settings. You can even customize the matter Pipeline and use Quick Intake to add a new contact and matter in a single step.

WORK EFFICIENTLY BETWEEN GROW AND MANAGE

Connect your Grow and Manage accounts to work efficiently and visibly between both systems. Create custom fields in Manage and sync them to Grow to capture additional client and case information. When clients use Clio Scheduler to book appointments with you, the appointments also appear in your Clio Manage calendar. And then when it's time to convert your contacts and matters to Clio Manage, it's easy to do so.

EASILY INTAKE CLIENTS AND TRACK CASE PROGRESS

Clio Grow makes it easy to collect new client information with online intake forms and send case-specific document templates to clients for their e-signature. Add custom fields to your forms and documents to capture essential information specific to the client or case and use workflows to keep track of what's done and what needs to be completed.

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.