

# Clio Academy Course Equivalents

## Learning Paths/Bundles

### CLIO MANAGE FOR ATTORNEYS

Previous Course Title	New Course Title
CM04 Clio Manage Matters	<ul style="list-style-type: none"><li>Optimize Matter Management in Clio Manage</li><li>Manage Matters on the Go with Clio's Mobile App</li><li>Master Matter Tracking with Statuses, Stages, and Dashboards in Clio Manage</li><li>Capture Essential Details with Custom Fields in Clio Grow and Clio Manage</li></ul>
CM05 Clio Manage Activities: Timekeeping and Expenses	<ul style="list-style-type: none"><li>Enhance Transparency with Time Tracking and Time Entries in Clio Manage</li><li>Maximize Efficiency with Time Tracking in Clio Manage</li><li>Track Spending with Expenses and Expense Categories in Clio Manage</li></ul>

Previous Course Title	New Course Title
CM07 Clio Manage Calendars	<p><b>Achieve Alignment with Calendar Permissions and Notifications in Clio Manage</b></p> <p><b>Organize your Schedule with Calendar Events and Event Types in Clio Manage</b></p> <p><b>Stay Connected with Calendar Tools in Clio Manage</b></p> <p><b>Streamline Scheduling with Calendar Integrations and Court Rules in Clio Manage</b></p>
CM08 Clio Manage Communications	<p><b>Boost Organization with Email Features in Clio Manage</b></p> <p><b>Connect from Anywhere Using Video Conferencing in Clio Manage</b></p> <p><b>Enhance Client Engagement with Text Messages and the Clio for Clients Portal in Clio Manage</b></p> <p><b>Maintain Clear Records with Email and Phone Logs in Clio Manage</b></p> <p><b>Strengthen Collaboration with Clio for Co-Counsel and Internal Messages in Clio Manage</b></p> <p><b>Tailor Client Communication with Bill Message Templates in Clio Manage</b></p>
CM09 Clio Manage Tasks	<p><b>Boost Productivity with Task Lists in Clio Manage</b></p> <p><b>Elevate Task Management with Tasks in Clio Manage</b></p>
CM10 Clio Manage Documents	<p><b>Accelerate your Workflow with Document Automation in Clio Manage</b></p> <p><b>Master File Management with Document Categories and Folders in Clio Manage</b></p> <p><b>Enhance Document Management with Clio Drive in Clio Manage</b></p> <p><b>Simplify Document Approval with eSignatures in Clio Grow and Clio Manage</b></p>



## CLIO MANAGE PRODUCT ESSENTIALS

Previous Course Title	New Course Title
CM01 Clio Manage Account Management and Setup	<b>Control Access with User Permissions and Groups in Clio Manage</b> <b>Strengthen Security with Encryption and Authentication</b>
CM02 Clio Manage Accounts	N/A
CM03 Clio Manage Contacts	<b>Maintain Accurate Contact Information in Clio Manage</b>
CM04 Clio Manage Matters	Optimize Matter Management in Clio Manage Manage Matters on the Go with Clio's Mobile App Master Matter Tracking with Statuses, Stages, and Dashboards in Clio Manage Capture Essential Details with Custom Fields in Clio Grow and Clio Manage
CM05 Clio Manage Activities: Timekeeping and Expenses	<b>Enhance Transparency with Time Tracking and Time Entries in Clio Manage</b> <b>Maximize Efficiency with Time Tracking in Clio Manage</b> <b>Track Spending with Expenses and Expense Categories in Clio Manage</b>



Previous Course Title	New Course Title
CM06 Clio Manage Billing	<ul style="list-style-type: none"><li>Accommodate Client Needs with Payment Plans in Clio Manage</li><li>Achieve Predictability with Contingency Fee and Flat Fee Matters in Clio Manage</li><li>Broaden Outreach with Related Contacts and Split Billing in Clio Manage</li><li>Configure Essential Billing Settings in Clio Manage</li><li>Customize Invoices with Bill Themes in Clio Manage</li><li>Enhance Transparency with Time Tracking and Time Entries in Clio Manage</li><li>Establish Payment Terms with Payment Profiles in Clio Manage</li><li>Evaluate Billing Requirements Before Initial Setup in Clio Manage</li><li>Facilitate Timely Payments with Bill Reminders in Clio Manage</li><li>Improve Bill Email Response with Personalized Bill Share Emails in Clio Manage</li><li>Improve Billing Accuracy with Bill Rates and UTBMS Codes in Clio Manage</li><li>Save Time with Bulk Billing in Clio Manage</li><li>Simplify Billing for Your Clients in Clio Manage</li><li>Streamline Payments with Clio Payments in Clio Manage</li><li>Tailor Client Communication with Bill Message Templates in Clio Manage</li><li>Track Spending with Expenses and Expense Categories in Clio Manage</li></ul>



Previous Course Title	New Course Title
<p>CM07 Clio Manage Calendars</p>	<p><b>Achieve Alignment with Calendar Permissions and Notifications in Clio Manage</b></p> <p><b>Organize your Schedule with Calendar Events and Event Types in Clio Manage</b></p> <p><b>Stay Connected with Calendar Tools in Clio Manage</b></p> <p><b>Streamline Scheduling with Calendar Integrations and Court Rules in Clio Manage</b></p>
<p>CM08 Clio Manage Communications</p>	<p><b>Boost Organization with Email Features in Clio Manage</b></p> <p><b>Connect from Anywhere Using Video Conferencing in Clio Manage</b></p> <p><b>Enhance Client Engagement with Text Messages and the Clio for Clients Portal in Clio Manage</b></p> <p><b>Maintain Clear Records with Email and Phone Logs in Clio Manage</b></p> <p><b>Strengthen Collaboration with Clio for Co-Counsel and Internal Messages in Clio Manage</b></p> <p><b>Tailor Client Communication with Bill Message Templates in Clio Manage</b></p>
<p>CM09 Clio Manage Tasks</p>	<p><b>Boost Productivity with Task Lists in Clio Manage</b></p> <p><b>Elevate Task Management with Tasks in Clio Manage</b></p>
<p>CM10 Clio Manage Documents</p>	<p><b>Accelerate your Workflow with Document Automation in Clio Manage</b></p> <p><b>Master File Management with Document Categories and Folders in Clio Manage</b></p> <p><b>Enhance Document Management with Clio Drive in Clio Manage</b></p> <p><b>Simplify Document Approval with eSignatures in Clio Grow and Clio Manage</b></p>



## CLIO MANAGE PRODUCT ESSENTIALS

<b>Previous Course Title</b>	<b>New Course Title</b>
CM11 Clio Manage Searching	N/A
CM12 Clio Manage Reports	<b>Analyze Productivity and Revenue with Dashboards in Clio Manage</b> <b>Gain Insight with Productivity Reports in Clio Manage</b>
CM13 Secure Communication and Collaboration Portals	<b>Enhance Client Engagement with Text Messages and the Clio for Clients Portal in Clio Manage</b> <b>Strengthen Collaboration with Clio for Co-Counsel and Internal Messages in Clio Manage</b>
CM14 Clio Manage Mobile App	<b>Manage Matters on the Go with Clio's Mobile App</b>
CM15 Clio Manage Introduction to Integrations	<b>Unify Your Workflow with Clio's App Integrations in Clio Manage</b>
Manage Product Essentials: Wrap-up	N/A



## CLIO MANAGE FOR PARALEGALS AND LEGAL ASSISTANTS

Previous Course Title	New Course Title
CM03 Clio Manage Contacts	<ul style="list-style-type: none"><li>Maintain Accurate Contact Information in Clio Manage</li><li>Capture Essential Details with Custom Fields in Clio Grow and Clio Manage</li><li>Establish Payment Terms with Payment Profiles in Clio Manage</li><li>Improve Billing Accuracy with Bill Rates and UTBMS Codes in Clio Manage</li></ul>
CM04 Clio Manage Matters	<ul style="list-style-type: none"><li>Optimize Matter Management in Clio Manage</li><li>Manage Matters on the Go with Clio's Mobile App</li><li>Master Matter Tracking with Statuses, Stages, and Dashboards in Clio Manage</li><li>Capture Essential Details with Custom Fields in Clio Grow and Clio Manage</li></ul>
CM05 Clio Manage Activities: Timekeeping and Expenses	<ul style="list-style-type: none"><li>Enhance Transparency with Time Tracking and Time Entries in Clio Manage</li><li>Maximize Efficiency with Time Tracking in Clio Manage</li><li>Track Spending with Expenses and Expense Categories in Clio Manage</li></ul>
CM07 Clio Manage Calendars	<ul style="list-style-type: none"><li>Achieve Alignment with Calendar Permissions and Notifications in Clio Manage</li><li>Organize your Schedule with Calendar Events and Event Types in Clio Manage</li><li>Stay Connected with Calendar Tools in Clio Manage</li><li>Streamline Scheduling with Calendar Integrations and Court Rules in Clio Manage</li></ul>



## CLIO MANAGE FOR PARALEGALS AND LEGAL ASSISTANTS

Previous Course Title	New Course Title
CM08 Clio Manage Communications	<p><b>Boost Organization with Email Features in Clio Manage</b></p> <p><b>Connect from Anywhere Using Video Conferencing in Clio Manage</b></p> <p><b>Enhance Client Engagement with Text Messages and the Clio for Clients Portal in Clio Manage</b></p> <p><b>Maintain Clear Records with Email and Phone Logs in Clio Manage</b></p> <p><b>Strengthen Collaboration with Clio for Co-Counsel and Internal Messages in Clio Manage</b></p> <p><b>Tailor Client Communication with Bill Message Templates in Clio Manage</b></p>
CM09 Clio Manage Tasks	<p><b>Boost Productivity with Task Lists in Clio Manage</b></p> <p><b>Elevate Task Management with Tasks in Clio Manage</b></p>
CM10 Clio Manage Documents	<p><b>Accelerate your Workflow with Document Automation in Clio Manage</b></p> <p><b>Master File Management with Document Categories and Folders in Clio Manage</b></p> <p><b>Enhance Document Management with Clio Drive in Clio Manage</b></p> <p><b>Simplify Document Approval with eSignatures in Clio Grow and Clio Manage</b></p>





## GETTING STARTED WITH CLIO GROW

Previous Course Title	New Course Title
CG01 Clio Grow General Overview	<ul style="list-style-type: none"><li>Drive Client Growth with Email Campaigns in Clio Grow</li><li>Expand your Business with Lead Tracking in Clio Grow</li><li>Elevate Intake Efficiency with Document Templates in Clio Grow</li><li>Keep Clients Informed with Communication Templates in Clio Grow</li><li>Monitor Matters with Matter Pipelines and Statuses in Clio Grow</li><li>Onboard Clients with Quick Intake in Clio Grow</li><li>Handle Documents Seamlessly in Clio Grow</li><li>Simplify Client Intake with Automated Workflows in Clio Grow</li><li>Simplify Document Approval with eSignatures in Clio Grow and Clio Manage</li><li>Streamline Intake with Tasks, Checklists, and Automated Workflows in Clio Grow</li></ul>
CG02 Clio Grow Account Setup	<ul style="list-style-type: none"><li>Capture Essential Details with Custom Fields in Clio Grow and Clio Manage</li><li>Enhance Contact Management in Clio Grow</li><li>Strengthen Security with Encryption and Authentication</li></ul>
CG03 Connecting Clio Grow to Clio Manage	N/A - Relevant information is provided within specific courses where applicable.



## GETTING STARTED WITH CLIO GROW

Previous Course Title	New Course Title
CG04 Clio Grow Lead Intake	<b>Expedite Intake with Text Notifications in Clio Grow</b> <b>Grow your Client Base with Google Local Services Ads</b> <b>Onboard Clients with Quick Intake in Clio Grow</b> <b>Simplify Client Intake with Automated Workflows in Clio Grow</b> <b>Streamline Intake with Tasks, Checklists, and Automated Workflows in Clio Grow</b>
CG05 Clio Grow Forms Creation	<b>Gather Essential Information with Intake Forms in Clio Grow</b>
CG06 Clio Grow Creating Document Templates for E-Signature	<b>Elevate Intake Efficiency with Document Templates in Clio Grow</b> <b>Handle Documents Seamlessly in Clio Grow</b> <b>Simplify Document Approval with eSignatures in Clio Grow and Clio Manage</b>
CG07 Clio Grow Creating Document Templates Using the Text Editor	<b>Elevate Intake Efficiency with Document Templates in Clio Grow</b> <b>Handle Documents Seamlessly in Clio Grow</b>
CG08 Clio Grow Matters & Matter Workflows	<b>Simplify Client Intake with Automated Workflows in Clio Grow</b> <b>Monitor Matters with Matter Pipelines and Statuses in Clio Grow</b> <b>Streamline Intake with Tasks, Checklists, and Automated Workflows in Clio Grow</b>
CG09 Clio Grow Reports	<b>Expand your Business with Lead Tracking in Clio Grow</b>



## GETTING STARTED IN CLIO MANAGE

Previous Course Title	New Course Title
CM01 Clio Manage Account Management and Setup	<b>Control Access with User Permissions and Groups in Clio Manage</b> <b>Strengthen Security with Encryption and Authentication</b>
CM03 Clio Manage Contacts	<b>Maintain Accurate Contact Information in Clio Manage</b>
CM04 Clio Manage Matters	<b>Optimize Matter Management in Clio Manage</b> <b>Manage Matters on the Go with Clio's Mobile App</b> <b>Master Matter Tracking with Statuses, Stages, and Dashboards in Clio Manage</b> <b>Capture Essential Details with Custom Fields in Clio Grow and Clio Manage</b>
CM05 Clio Manage Activities: Timekeeping and Expenses	<b>Enhance Transparency with Time Tracking and Time Entries in Clio Manage</b> <b>Maximize Efficiency with Time Tracking in Clio Manage</b> <b>Track Spending with Expenses and Expense Categories in Clio Manage</b>



Previous Course Title	New Course Title
<p>CM06 Clio Manage Billing</p>	<p>Accommodate Client Needs with Payment Plans in Clio Manage</p> <p>Achieve Predictability with Contingency Fee and Flat Fee Matters in Clio Manage</p> <p>Broaden Outreach with Related Contacts and Split Billing in Clio Manage</p> <p>Configure Essential Billing Settings in Clio Manage</p> <p>Customize Invoices with Bill Themes in Clio Manage</p> <p>Enhance Transparency with Time Tracking and Time Entries in Clio Manage</p> <p>Establish Payment Terms with Payment Profiles in Clio Manage</p> <p>Evaluate Billing Requirements Before Initial Setup in Clio Manage</p> <p>Facilitate Timely Payments with Bill Reminders in Clio Manage</p> <p>Improve Bill Email Response with Personalized Bill Share Emails in Clio Manage</p> <p>Improve Billing Accuracy with Bill Rates and UTBMS Codes in Clio Manage</p> <p>Save Time with Bulk Billing in Clio Manage</p> <p>Simplify Billing for Your Clients in Clio Manage</p> <p>Streamline Payments with Clio Payments in Clio Manage</p> <p>Tailor Client Communication with Bill Message Templates in Clio Manage</p> <p>Track Spending with Expenses and Expense Categories in Clio Manage</p>
<p>CM09 Clio Manage Tasks</p>	<p>Boost Productivity with Task Lists in Clio Manage</p> <p>Elevate Task Management with Tasks in Clio Manage</p>



# Individual Courses

## CLIO GROW

Previous Course Title	New Course Title
CG01 Clío Grow General Overview	<ul style="list-style-type: none"><li>Drive Client Growth with Email Campaigns in Clío Grow</li><li>Expand your Business with Lead Tracking in Clío Grow</li><li>Elevate Intake Efficiency with Document Templates in Clío Grow</li><li>Keep Clients Informed with Communication Templates in Clío Grow</li><li>Monitor Matters with Matter Pipelines and Statuses in Clío Grow</li><li>Onboard Clients with Quick Intake in Clío Grow</li><li>Handle Documents Seamlessly in Clío Grow</li><li>Simplify Client Intake with Automated Workflows in Clío Grow</li><li>Simplify Document Approval with eSignatures in Clío Grow and Clío Manage</li><li>Streamline Intake with Tasks, Checklists, and Automated Workflows in Clío Grow</li></ul>
CG02 Clío Grow Account Setup	<ul style="list-style-type: none"><li>Capture Essential Details with Custom Fields in Clío Grow and Clío Manage</li><li>Enhance Contact Management in Clío Grow</li><li>Strengthen Security with Encryption and Authentication</li></ul>
CG03 Connecting Clío Grow to Clío Manage	N/A - Relevant information is provided within specific courses where applicable.



## CLIO GROW

Previous Course Title	New Course Title
CG04 Clio Grow Lead Intake	<b>Expedite Intake with Text Notifications in Clio Grow</b> <b>Grow your Client Base with Google Local Services Ads</b> <b>Onboard Clients with Quick Intake in Clio Grow</b> <b>Simplify Client Intake with Automated Workflows in Clio Grow</b> <b>Streamline Intake with Tasks, Checklists, and Automated Workflows in Clio Grow</b>
CG05 Clio Grow Forms Creation	<b>Gather Essential Information with Intake Forms in Clio Grow</b>
CG06 Clio Grow Creating Document Templates for E-Signature	<b>Elevate Intake Efficiency with Document Templates in Clio Grow</b> <b>Handle Documents Seamlessly in Clio Grow</b> <b>Simplify Document Approval with eSignatures in Clio Grow and Clio Manage</b>
CG07 Clio Grow Creating Document Templates Using the Text Editor	<b>Elevate Intake Efficiency with Document Templates in Clio Grow</b> <b>Handle Documents Seamlessly in Clio Grow</b> <b>Simplify Document Approval with eSignatures in Clio Grow and Clio Manage</b>
CG08 Clio Grow Matters & Matter Workflows	<b>Simplify Client Intake with Automated Workflows in Clio Grow</b> <b>Monitor Matters with Matter Pipelines and Statuses in Clio Grow</b> <b>Streamline Intake with Tasks, Checklists, and Automated Workflows in Clio Grow</b>
CG09 Clio Grow Reports	<b>Expand your Business with Lead Tracking in Clio Grow</b>



## CLIO GROW

Previous Course Title	New Course Title
CG10 Clio Scheduler	<b>Simplify Appointment Scheduling and Payments with Clio Scheduler in Clio Grow</b>

## CLIO MANAGE

Previous Course Title	New Course Title
CM01 Clio Manage Account Management and Setup	<b>Control Access with User Permissions and Groups in Clio Manage</b> <b>Strengthen Security with Encryption and Authentication</b>
CM02 Clio Manage Accounts	N/A
CM03 Clio Manage Contacts	<b>Maintain Accurate Contact Information in Clio Manage</b> <b>Capture Essential Details with Custom Fields in Clio Grow and Clio Manage</b> <b>Establish Payment Terms with Payment Profiles in Clio Manage</b> <b>Improve Billing Accuracy with Bill Rates and UTBMS Codes in Clio Manage</b>
CM04 Clio Manage Matters	<b>Optimize Matter Management in Clio Manage</b> <b>Manage Matters on the Go with Clio's Mobile App</b> <b>Master Matter Tracking with Statuses, Stages, and Dashboards in Clio Manage</b> <b>Capture Essential Details with Custom Fields in Clio Grow and Clio Manage</b>



Previous Course Title	New Course Title
<p>CM05 Clio Manage Activities: Timekeeping and Expenses</p>	<p><b>Enhance Transparency with Time Tracking and Time Entries in Clio Manage</b></p> <p><b>Maximize Efficiency with Time Tracking in Clio Manage</b></p> <p><b>Track Spending with Expenses and Expense Categories in Clio Manage</b></p>
<p>CM06 Clio Manage Billing</p>	<p><b>Accommodate Client Needs with Payment Plans in Clio Manage</b></p> <p><b>Achieve Predictability with Contingency Fee and Flat Fee Matters in Clio Manage</b></p> <p><b>Broaden Outreach with Related Contacts and Split Billing in Clio Manage</b></p> <p><b>Configure Essential Billing Settings in Clio Manage</b></p> <p><b>Customize Invoices with Bill Themes in Clio Manage</b></p> <p><b>Enhance Transparency with Time Tracking and Time Entries in Clio Manage</b></p> <p><b>Establish Payment Terms with Payment Profiles in Clio Manage</b></p> <p><b>Evaluate Billing Requirements Before Initial Setup in Clio Manage</b></p> <p><b>Facilitate Timely Payments with Bill Reminders in Clio Manage</b></p> <p><b>Improve Bill Email Response with Personalized Bill Share Emails in Clio Manage</b></p> <p><b>Improve Billing Accuracy with Bill Rates and UTBMS Codes in Clio Manage</b></p> <p><b>Save Time with Bulk Billing in Clio Manage</b></p> <p><b>Simplify Billing for Your Clients in Clio Manage</b></p> <p><b>Streamline Payments with Clio Payments in Clio Manage</b></p> <p><b>Tailor Client Communication with Bill Message Templates in Clio Manage</b></p> <p><b>Track Spending with Expenses and Expense Categories in Clio Manage</b></p>





## CLIO MANAGE

Previous Course Title	New Course Title
CM07 Clio Manage Calendars	<p><b>Achieve Alignment with Calendar Permissions and Notifications in Clio Manage</b></p> <p><b>Organize your Schedule with Calendar Events and Event Types in Clio Manage</b></p> <p><b>Stay Connected with Calendar Tools in Clio Manage</b></p> <p><b>Streamline Scheduling with Calendar Integrations and Court Rules in Clio Manage</b></p>
CM08 Clio Manage Communications	<p><b>Boost Organization with Email Features in Clio Manage</b></p> <p><b>Connect from Anywhere Using Video Conferencing in Clio Manage</b></p> <p><b>Enhance Client Engagement with Text Messages and the Clio for Clients Portal in Clio Manage</b></p> <p><b>Maintain Clear Records with Email and Phone Logs in Clio Manage</b></p> <p><b>Strengthen Collaboration with Clio for Co-Counsel and Internal Messages in Clio Manage</b></p> <p><b>Tailor Client Communication with Bill Message Templates in Clio Manage</b></p>
CM09 Clio Manage Tasks	<p><b>Boost Productivity with Task Lists in Clio Manage</b></p> <p><b>Elevate Task Management with Tasks in Clio Manage</b></p>
CM10 Clio Manage Documents	<p><b>Accelerate your Workflow with Document Automation in Clio Manage</b></p> <p><b>Master File Management with Document Categories and Folders in Clio Manage</b></p> <p><b>Enhance Document Management with Clio Drive in Clio Manage</b></p> <p><b>Simplify Document Approval with eSignatures in Clio Grow and Clio Manage</b></p>



## CLIO MANAGE

<b>Previous Course Title</b>	<b>New Course Title</b>
CM11 Clio Manage Searching	N/A
CM12 Clio Manage Reports	<b>Analyze Productivity and Revenue with Dashboards in Clio Manage</b> <b>Gain Insight with Productivity Reports in Clio Manage</b>
CM13 Secure Communication and Collaboration Portals	<b>Enhance Client Engagement with Text Messages and the Clio for Clients Portal in Clio Manage</b> <b>Strengthen Collaboration with Clio for Co-Counsel and Internal Messages in Clio Manage</b>
CM14 Clio Manage Mobile App	<b>Manage Matters on the Go with Clio's Mobile App</b>
CM15 Clio Manage Introduction to Integrations	<b>Unify Your Workflow with Clio's App Integrations in Clio Manage</b>
CM16 UK & EU Quick Start Onboarding #1 - What You Need to Know to Start Using Clio Today	N/A
CM17 UK & EU Quick Start Onboarding #2 - Fast Track to a Paperless Practice	N/A
CM18 UK & EU Quick Start Onboarding #3 - Billing in the Cloud & Getting Paid	N/A
CM19 UK & EU Quick Start Onboarding #4 - Collaboration and Client Experience in the Cloud	N/A



## CLIO MANAGE

<b>Previous Course Title</b>	<b>New Course Title</b>
CM20 Clio Payments	<b>Streamline Payments with Clio Payments in Clio Manage</b>
CM21 Clio Payments	<b>Streamline Payments with Clio Payments in Clio Manage</b>
CM22 Clio Manage Dashboards	<b>Analyze Productivity and Revenue with Dashboards in Clio Manage</b> <b>Master Matter Tracking with Statuses, Stages, and Dashboards in Clio Manage</b>
CM30 Clio Manage Court Rules	<b>Streamline Scheduling with Calendar Integrations and Court Rules in Clio Manage</b>

