

Fast Track to a Paperless Practice With Clio Manage

Congratulations on finishing your second Quick Start session!

This session covered creating and using document templates, uploading and sharing document files, the benefits of Clio Drive, saving emails to a matter, and preparing and sending documents for collecting e-signatures. Here's a summary of the key highlights:



AUTOMATE YOUR DOCUMENT PROCESS

Document templates and merge fields make it easy to quickly and efficiently draft documents used across multiple matters. When you create documents from templates or [upload document files and folders](#), it's easy to send them to clients and co-counsel to collect [electronic signatures](#).



COLLABORATE ON DOCUMENTS ACROSS THE FIRM

Create, edit, and access documents right from your desktop using [Clio Drive](#). When you [add or edit documents in Clio Drive](#), the changes are mirrored in the Clio Manage desktop app. This makes it convenient for you and your firm members to collaborate on shared work.



FILE EMAILS TO MATTERS QUICKLY AND EASILY

Clio gives you three convenient ways to send emails to your matter—Maildrop, Clio's Outlook Add-in, and Clio for Gmail. Forward emails automatically to a matter using the matter's [Maildrop address](#) or file emails quickly and efficiently using Clio's plug-in integrations for [Outlook](#) and [Gmail](#).



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.