



# Efficiencies in Clio's iPhone App Webinar

The Efficiencies in Clio's iPhone App Webinar is designed to give a review of tips you can use today on your mobile device with Clio. A few tips, a few tricks; all good instructions.

This Document will cover the basics of what is discussed in the Efficiencies in Clio's iPhone App Webinar.

[www.clio.com](http://www.clio.com)

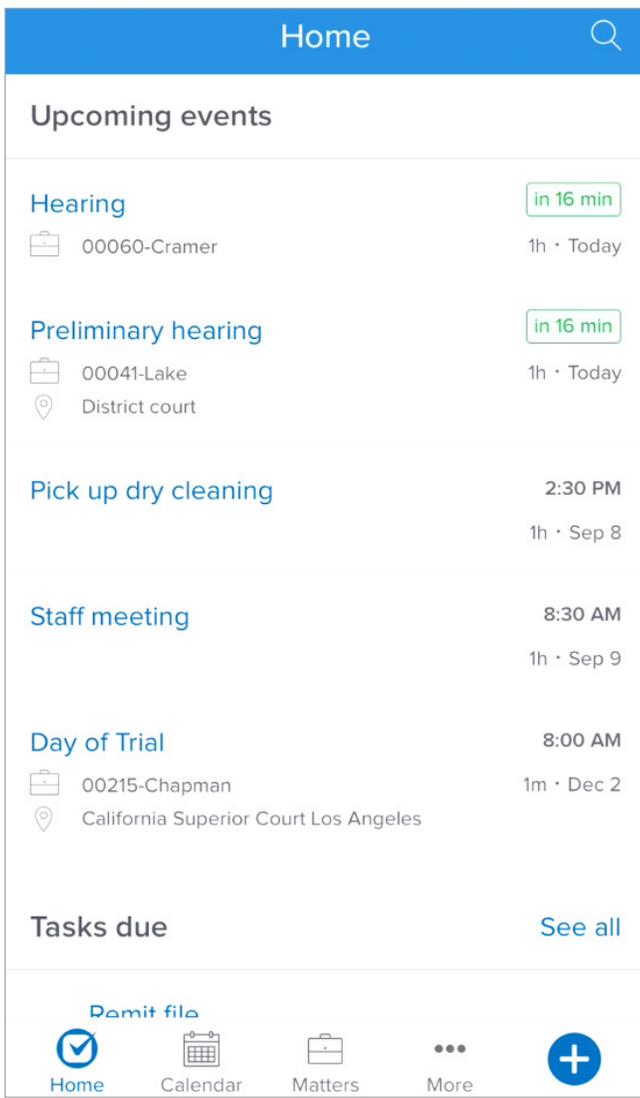
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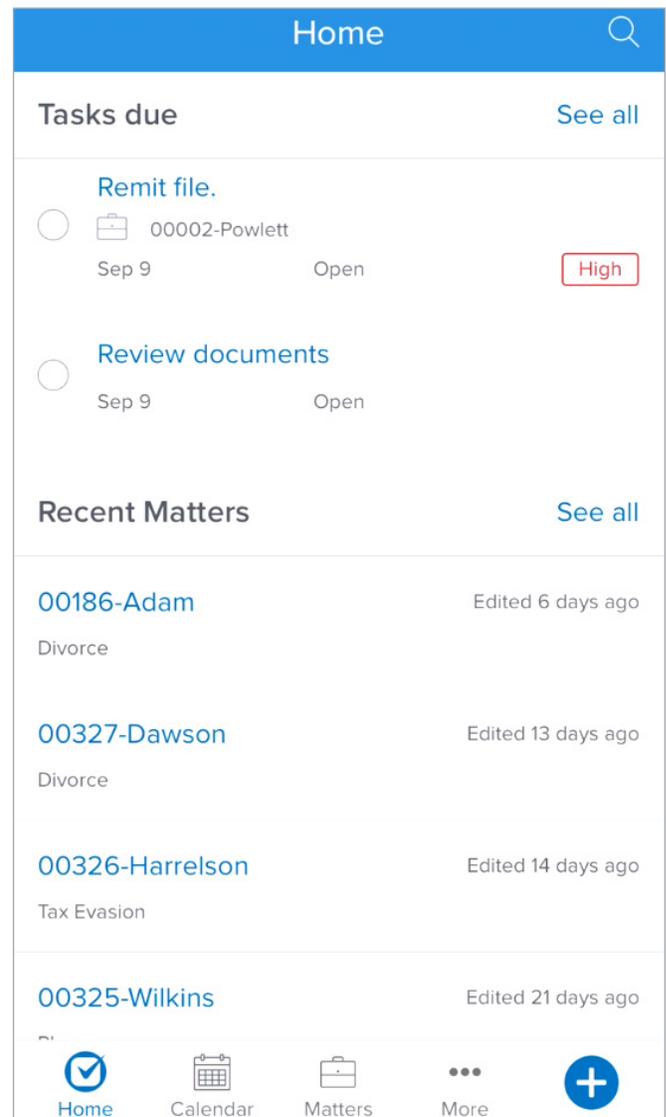
## Home Screen

From the Home Screen of the Clio iPhone app, you can select from the available quick options to review your most important items quickly.

1. When opening the iPhone app, you will be directed to the home screen. Here you will see Upcoming Calendar events and Tasks. At the upper right, there is also a search option.



2. Scrolling down the Home Screen you will see recently accessed Matters. Both the listed Tasks and Matters give you the option to select "See all". At the bottom of the home screen are the list of options to quickly access Calendars, Matters, or More.

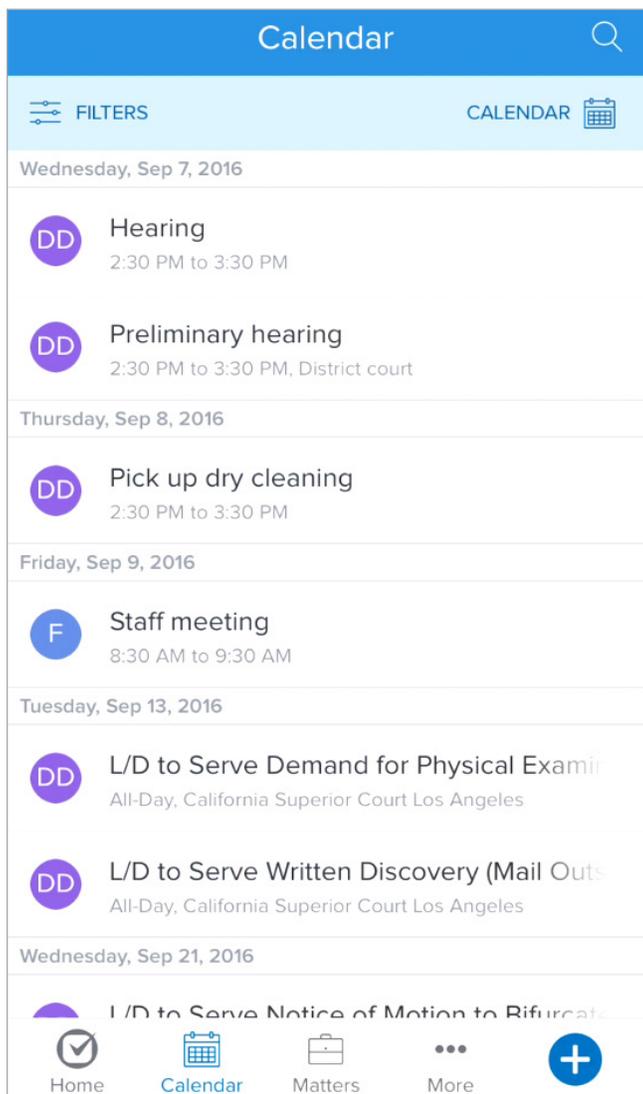


More details can be read in the [iOS App Support Articles](#).

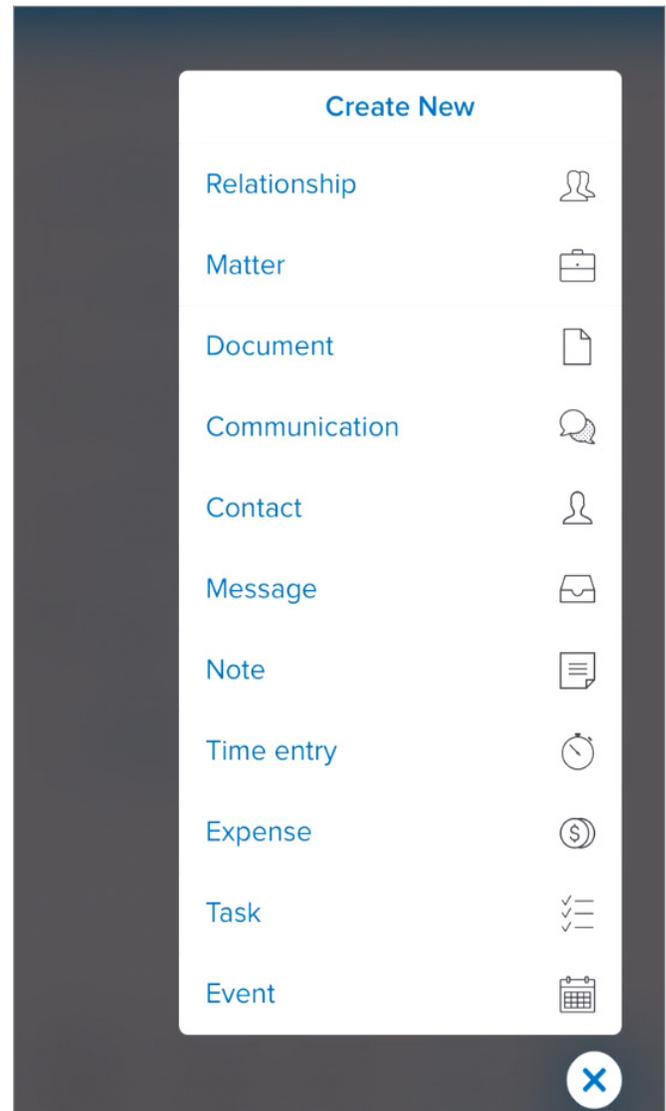
## Global Create

From any page in the Clio app, you can select the blue plus symbol at the bottom right to create new items across your account.

1. Select the blue plus symbol at the bottom right.



2. Select to create a new item in your Clio account from any page that you access this option. From a new Document, to a new Task, the available options will save you time.

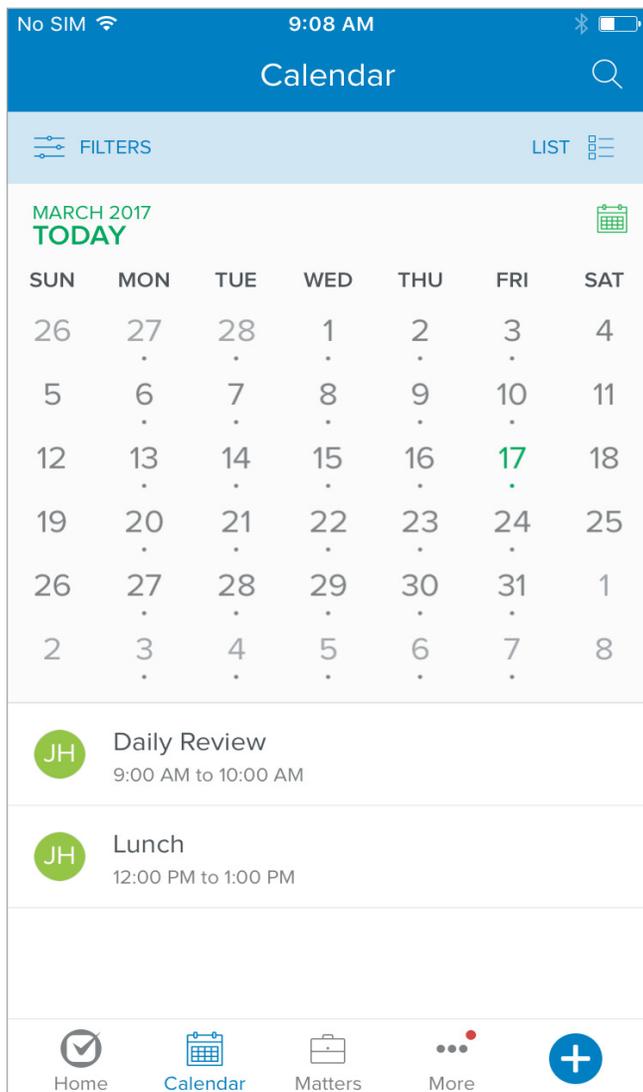


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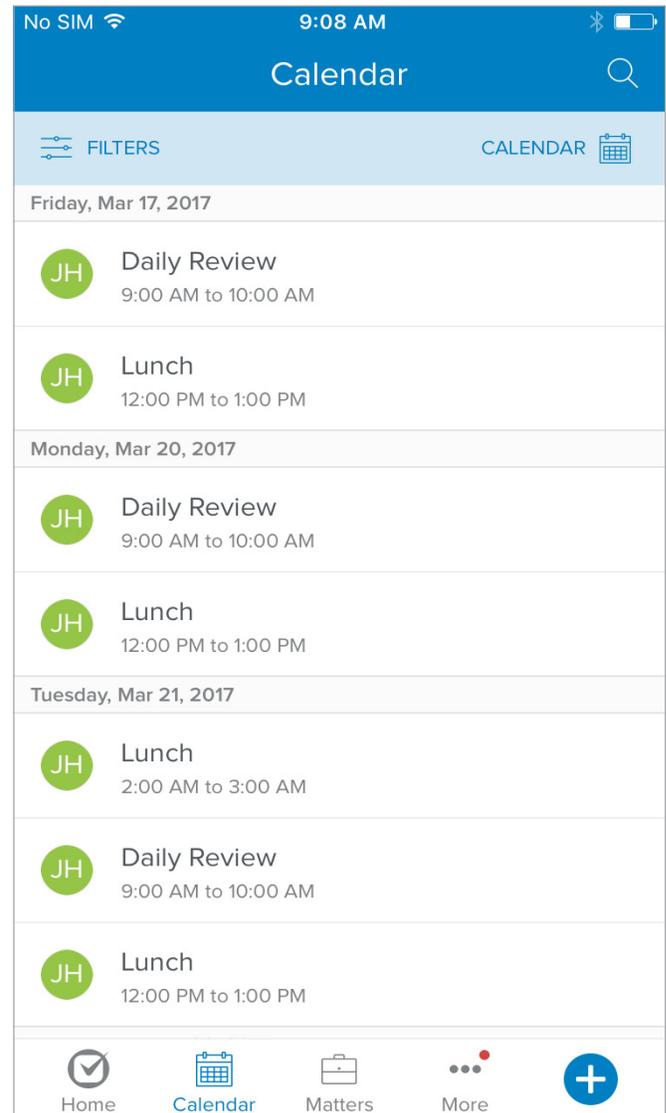
## Customizations

There are custom selections you can make in the Clio app that it will remember. One of the pages you can customize is the Calendar page.

1. When opening the Calendar page, you will see it as you last visited it. To change the view, select List at the upper right.



2. Your page will now display all events in a list. The next time you open your app and visit the Calendar page, you will see your events listed the same way as when you left.

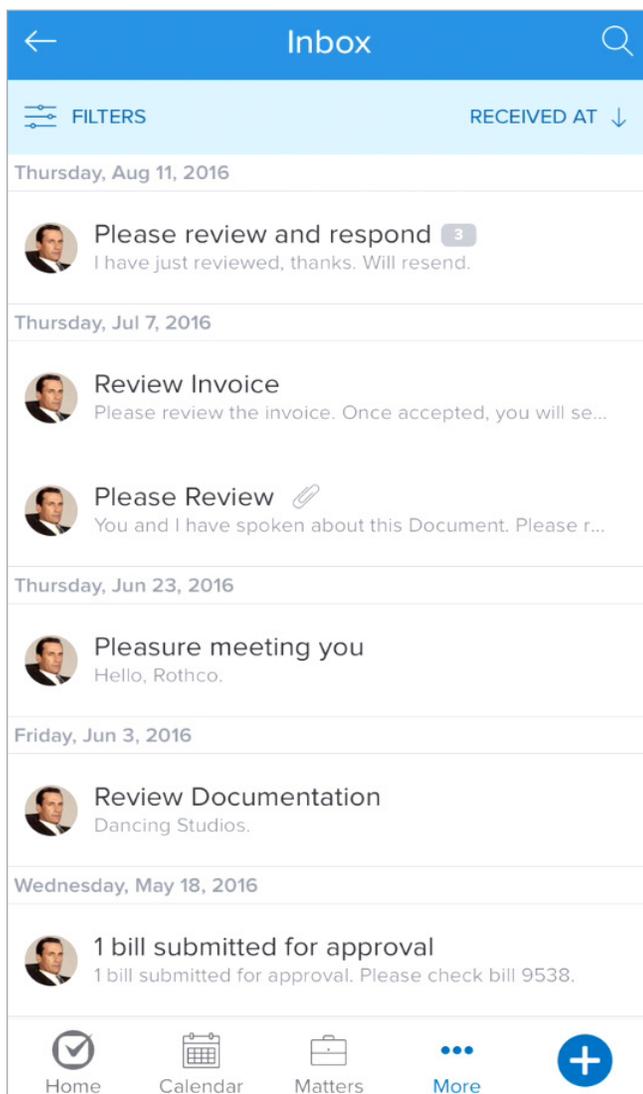


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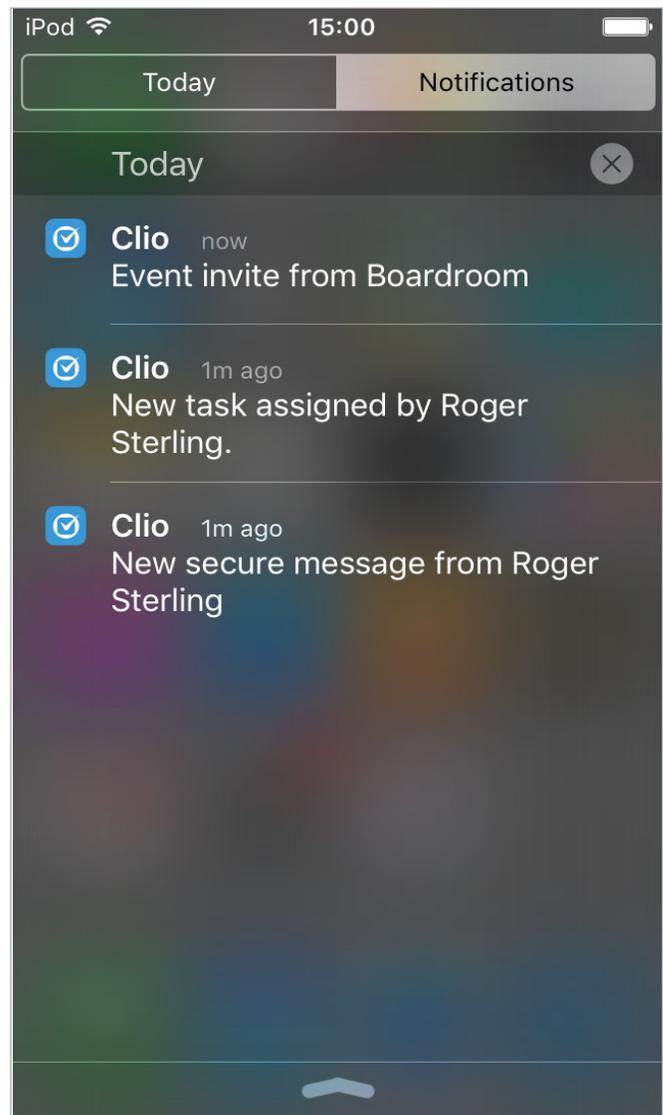
## Notifications

Notifications can ping your mobile device to let you know of Event invites, new Tasks, and new Secure Messages.

1. Assign a member of your firm a new Task, invite them as an attendee to a Calendar event, or send a new Secure Message.



2. The recipient will then receive notifications on their iPhone from the Clio iOS app for each new item.



More details can be read in the [iOS App Support Articles](#).

## Time management

Tracking billable items in the iOS app is efficient, and easy. Track new items while on the go, or utilize your phone in the office.

1. In the Clio iPhone app you can select to add time from multiple pages. When viewing Matters, select the three dots on the right to add quick items, such as Time.



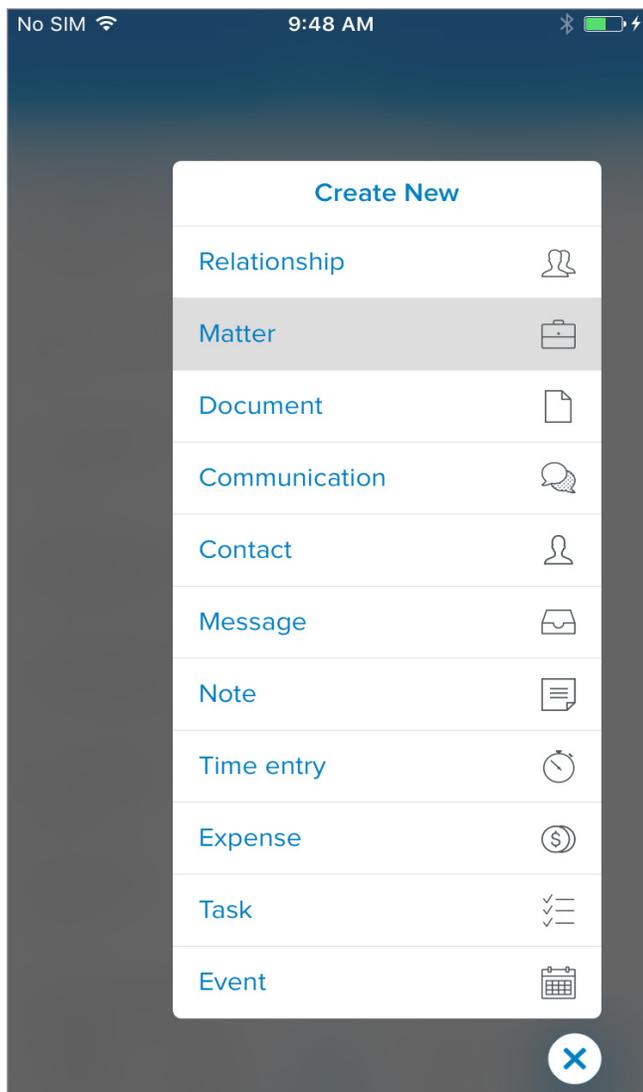
2. Input the details of your Time Entry and when finished, select Create Time Entry. This item will now be ready for billing.

More details can be read in the [iOS App Support Articles](#).

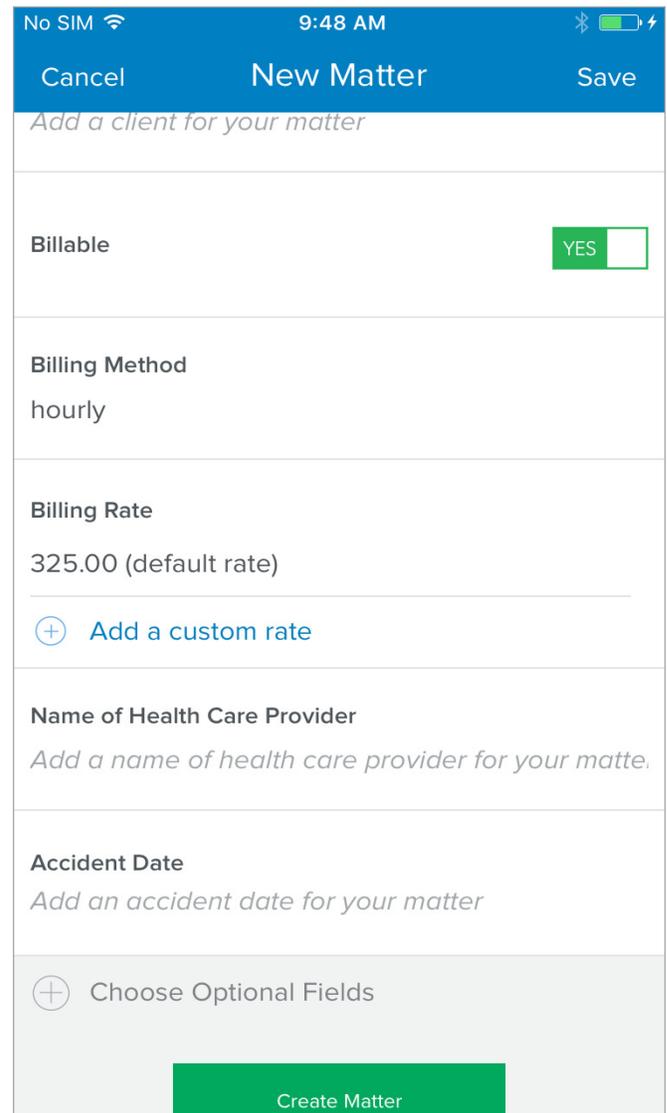
## Matter Management

Track new matters wherever you are by utilizing the iPhone App's Global Create function.

1. Select the blue plus button at the bottom right, and from the create options, select Matter.



2. Input the appropriate details to be tracked with your new Matter, and then select Create Matter at the bottom of the screen, or Save at the upper right.

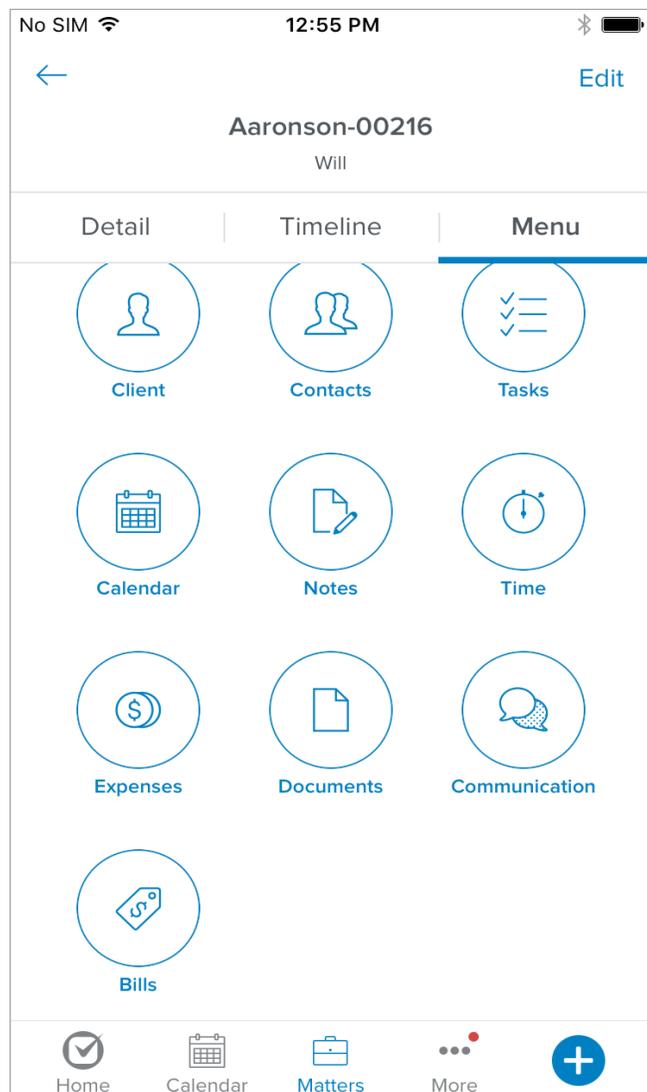


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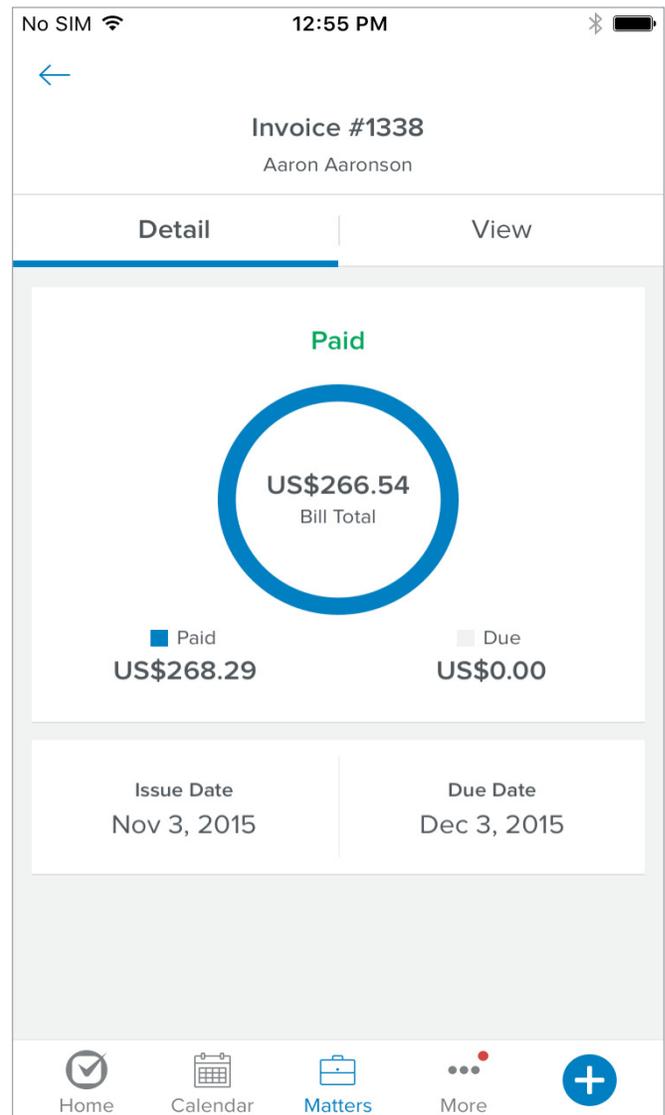
## Viewing Bills

If your client asks about their current owing balance, a payment made towards a bill, or you simply wish to see where an account stands, check the Bills from the iOS app.

1. When viewing the Menu under a Matter, select Bills at the lower left of the page.



2. Select Detail to see a simplified perspective of the important points; payments and amounts outstanding. Select View to see a preview of the Bill.

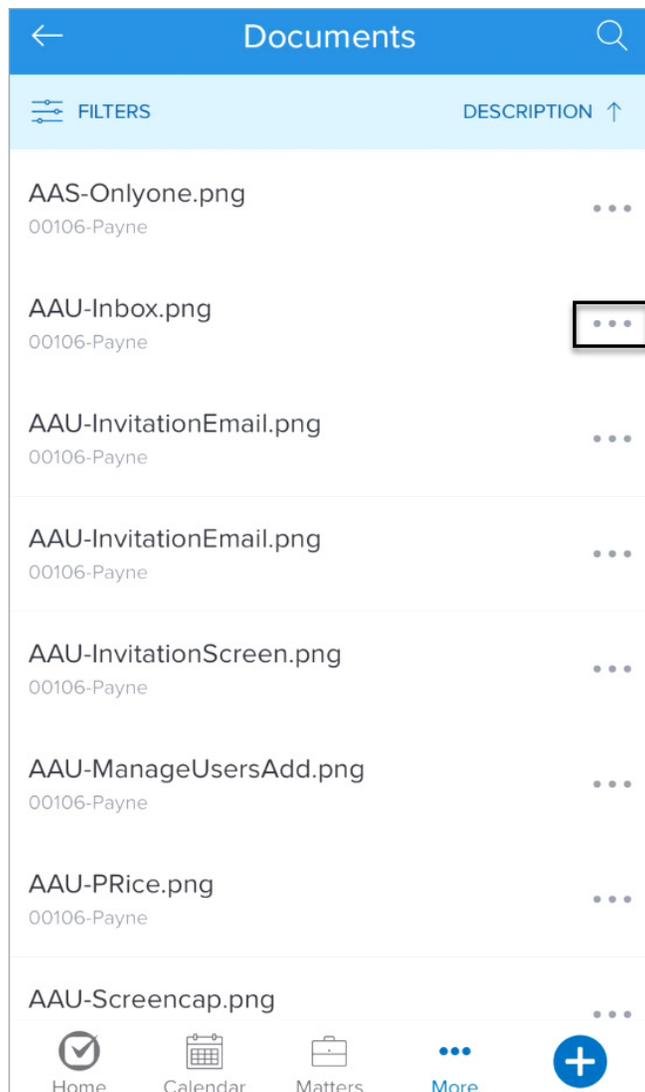


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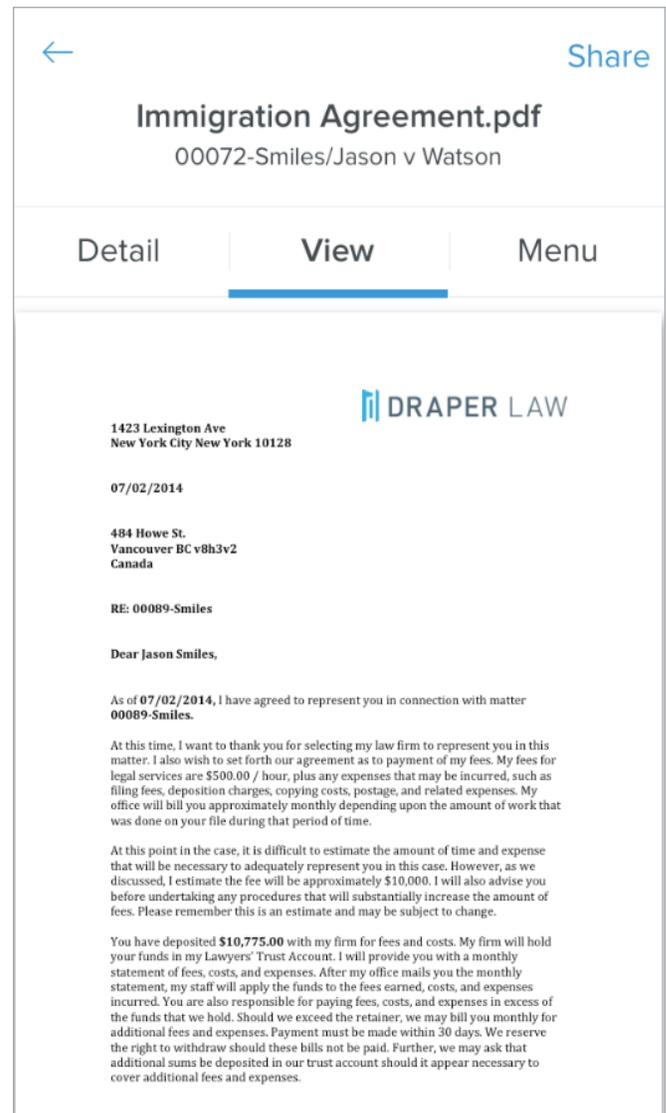
## Viewing Documents

See all of your account's Documents in a list view, or review the details of a Document by selecting an individual. This allows you to work mobility as if you were still in the office.

1. From Documents, review your list of files. Select the three dots on the right of a Document to view the details.



2. Select View at the top middle of the page. Here you will be able to read over your Document.



More details can be read in the [iOS App Support Articles](#).

Further Training:

# Clio Product Pro

## A guided learning Experience

After our Webinar, our users should feel more comfortable using our standard tools. For a more in-depth training experience, give Clio Product Pro a try!

Clio Product Pro Certification provides the opportunity to learn the ins and outs of Clio through a self-paced, guided learning experience. You'll start things off with an understanding of what it really means to work "in the cloud" and how to do so ethically and securely. Then, we'll explore all of our features and functions to ensure that you are absolutely comfortable managing your practice in Clio.

Sign up today at [clio.com/clio-product-pro](https://clio.com/clio-product-pro)

