

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.

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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.

Home	Q
Upcoming events	
Hearing	in 16 min
<u> </u>	1h • Today
Preliminary hearing	in 16 min
 O0041-Lake District court 	1h • Today
Pick up dry cleaning	2:30 PM
	1h ∙ Sep 8
Staff meeting	8:30 AM
	1h · Sep 9
Day of Trial	8:00 AM
00215-Chapman	1m ∙ Dec 2
California Superior Court Los Angeles	
Tasks due	See all
Pamit fila	
Home Calendar Matters More	Ð

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.

		Home	Q
Tas	sks due		See all
\bigcirc	Remit file.	t Open	High
\bigcirc	Review docum	ents	(ingri
	Sep 9	Open	
Red	cent Matters		See all
001 Divo	86-Adam ^{rce}		Edited 6 days ago
003 Divo	327-Dawson		Edited 13 days ago
003 Tax E	326-Harrelson Evasion		Edited 14 days ago
003	325-Wilkins		Edited 21 days ago
На	Calendar	Matters	••• More

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.



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.

No SIM	হ		9:08 AM			* 📭
		C	alenda	ar		Q
≓ FI	LTERS				LIS	т 8 <u>—</u>
	H 2017 AY					
SUN	MON	TUE	WED	THU	FRI	SAT
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8
JH	Daily R 9:00 AM	Review to 10:00 #	AM			
JH	Lunch 12:00 PM	1 to 1:00 P	M			
0) f	0—0 1 ⊞⊞]	Ē			
Hom	e Cal	lendar	Matters	More	Э	

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.

No SIM 1		* 📼
	Calendar	Q
🚔 Fil	TERS	CALENDAR
Friday, N	1ar 17, 2017	
JH	Daily Review 9:00 AM to 10:00 AM	
JH	Lunch 12:00 PM to 1:00 PM	
Monday,	Mar 20, 2017	
JH	Daily Review 9:00 AM to 10:00 AM	
JH	Lunch 12:00 PM to 1:00 PM	
Tuesday	, Mar 21, 2017	
JH	Lunch 2:00 AM to 3:00 AM	
JH	Daily Review 9:00 AM to 10:00 AM	
JH	Lunch 12:00 PM to 1:00 PM	
Home	e Calendar Matters	More

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.



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 selet to add time from multiple pages. When viewing Matters, select the three dots on the right to add quick items, such as Time.

	Matters	Q +
FILTERS	DATE N	100ified 🗸
00197-Rogers// Adoption	Adoption	
00296-Goertza Divorce	an/	•••
00295-Weschle Divorce / Separation	ein/	•••
00294-Beth/ Immigration		
Add Time Add	Event Add Task	Add Note
	Cancel	

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

Cancel	New Time Entry	Save
Date Tuesday, Sep	6, 2016	
Duration 1h 10m, 1:10, 7	70min	
Rate 350		
Description Add a descrip	otion for your time entry	
Matter Add a matter	for your time entry	
+ Choose	Optional Fields	
	Create Time Entry	I

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.

No SIM 🗢	9:48 AM	* 💷 +
Cancel	New Matter	Save
Add a client fo	or your matter	
Billable		YES
Billing Method		
hourly		
Billing Rate 325.00 (defau + Add a cu	lt rate) stom rate	
Name of Health	Care Provider	
Add a name c	of health care provider fo	or your matte.
Accident Date Add an accide	ent date for your matter	
(+) Choose (Optional Fields	
	Create Matter	

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.



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 mobily 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.

\leftarrow	Documents	Q
FILTERS		DESCRIPTION ↑
AAS-Onlyone.pn 00106-Payne	g	• • •
AAU-Inbox.png 00106-Payne		•••
AAU-InvitationEr	nail.png	000
AAU-InvitationEr	nail.png	000
AAU-InvitationSc 00106-Payne	creen.png	000
AAU-ManageUse 00106-Payne	ersAdd.png	
AAU-PRice.png 00106-Payne		• • •
AAU-Screencap.	png	0 0 0
Home Calend	ar Matters	More

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

\leftarrow		Share			
Immigration Agreement.pdf 00072-Smiles/Jason v Watson					
Detail	View	Menu			
1423 Lexington Ave New York City New Y	ork 10128	PER LAW			
07/02/2014					
484 Howe St. Vancouver BC v8h3v2 Canada					
RE: 00089-Smiles					
Dear Jason Smiles,	Dear Jason Smiles,				
As of 07/02/2014, I have agreed to represent you in connection with matter 00089-Smiles.					
At this time, I want to thank you for selecting my law firm to represent you in this matter. I also wish to set forth our agreement as to payment of my fees. My fees for legal services are \$50.00 /h uour, plus any expenses that may be incurred, such as filing fees, deposition charges, copying costs, postage, and related expenses. My office will bill you approximately monthly depending upon the amount of work that was done on your file during that period of time.					
At this point in the case, it is difficult to estimate the amount of time and expense that will be necessary to adequately represent you in this case. However, as we discussed, I estimate the fee will be approximately \$10,000.1 will also advise you before undertaking any procedures that will substantially increase the amount of fees. Please remember this is an estimate and may be subject to change.					
You have deposited \$1 your funds in my Lawy statement of fees, cost statement, my staff wil incurred. You are also the funds that we hold additional fees and exy the right to withdraw additional sums be dep cover additional fees a	0,775.00 with my firm for fees and cost: ters' Trust Account. I will provide you wi s and expenses. After my office mails you l apply the funds to the fees earned, cost promible for paying fees, costs, and ex . Should we exceed the retainer, we may enses. Payment must be made within 33 should these bills not be paid. Purther, we posited in our trust account should it app nd expenses.	s. My firm will hold th a monthly at the monthly s, and expenses penses in excess of bill you monthly for days. We reserve e may ask that sear necessary to			

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

