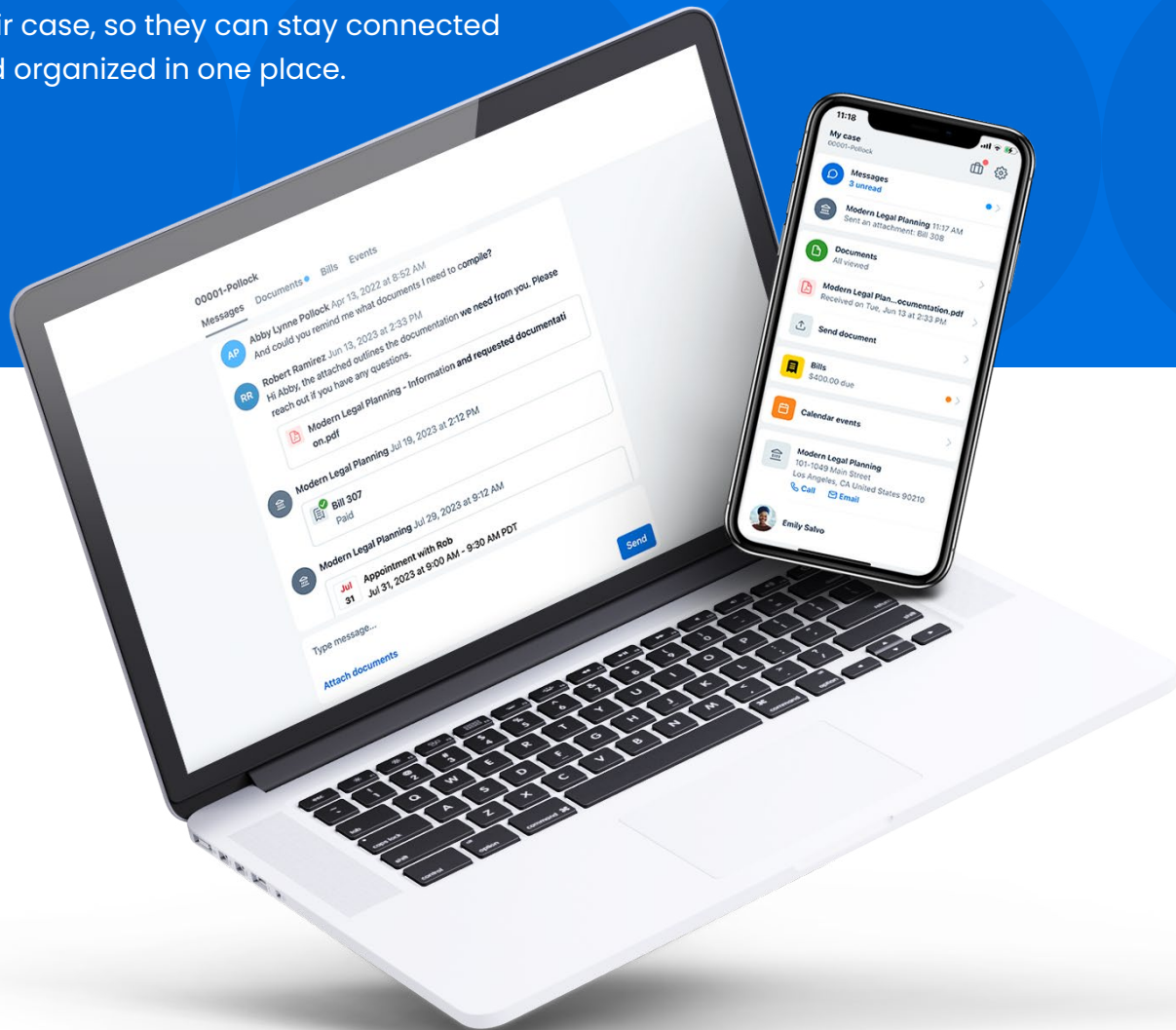




Get started with Clio for Clients —your secure client portal

Give clients access to every aspect of their case, so they can stay connected and organized in one place.



Clio for Clients is a secure online portal for you and your clients to communicate and share resources. You can [create a client portal](#) for a matter in Clio Manage, then [share messages](#), [documents](#), [bills](#), and [calendar events](#).

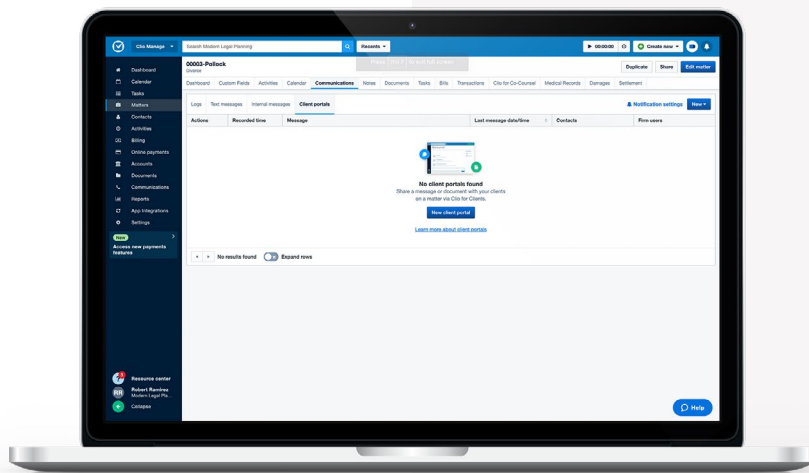
Clients can access Clio for Clients—and everything you share with them—from a web browser, or our popular mobile app that features a 4.9–star rating based on thousands of client reviews.

Clio for Clients is free for clients to use—and it’s included with your Clio Manage subscription.*

**Included in Essentials, Advanced, and Complete subscriptions.*

Create a client portal to get started

To get started, [create a new client portal](#) for a client matter. Once created, you can then [share messages](#), [documents](#), [bills](#), or [calendar events](#) through the portal. For each item shared, your client will receive an email notification with a link to access it via Clío for Clients.

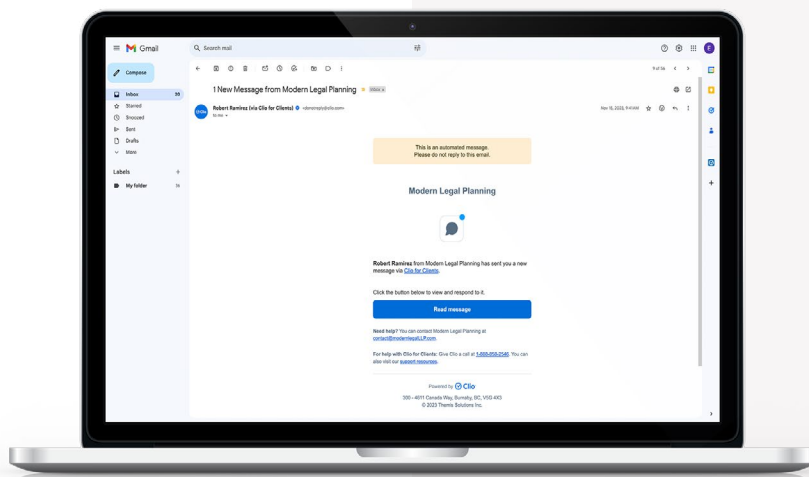


Clients can access Clío for Clients from any device

Once you've shared an item with them, they can log in at any time to reference information about their case, and they'll receive email notifications with a link whenever you share updates.

Clients can access Clío for Clients—on any device—in one of two ways:

1. Using a web browser to visit clients.clio.com
2. Downloading the Clío for Clients mobile app, available in the [App Store](#) and [Google Play store](#)



Secure, password-free login

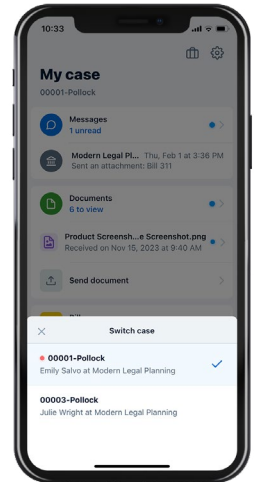
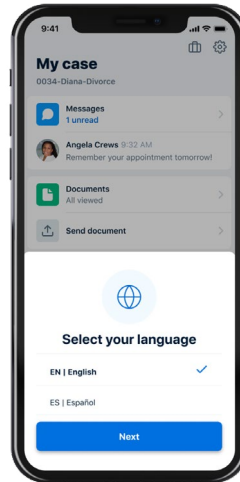
Your clients don't need to remember a password to securely access Clío for Clients. If using a web browser, they'll be asked to authenticate their account via an email sent to their inbox. For the mobile app, clients can protect their account using Face ID or fingerprint.



Tailored client experiences

When logging in for the first time, clients will be prompted to select either English or Spanish so that the portal and any notification emails will be displayed in their preferred language.

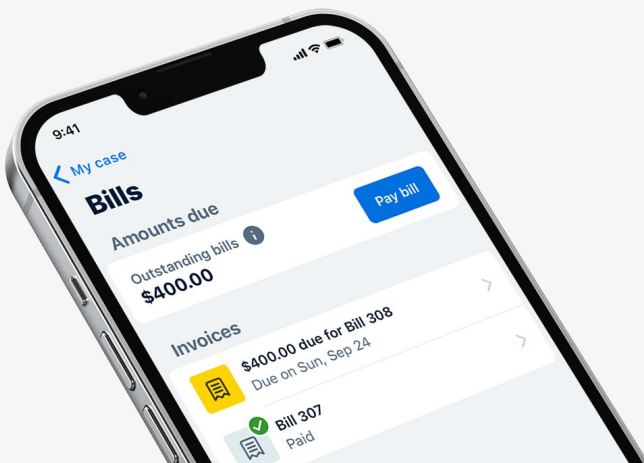
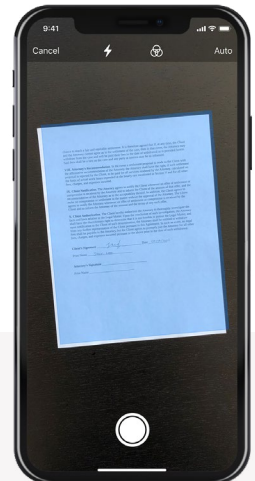
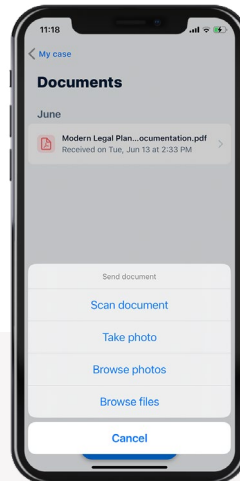
In Clio for Clients, clients can see information about your firm and any messages, documents, bills, or calendar events that you've shared with them. If a client has multiple matters, all communications and resources will be organized by matter, so that they can switch between cases.



Clients can easily share documents and pay their bills

Clio for Clients makes it easy for clients to submit documents to your firm. They can upload and share documents individually or in bulk, and the mobile app lets them scan multiple pages into a single PDF. Their shared documents are automatically saved to their matter in your Clio Manage account.

When you share invoices electronically with clients, they can submit payments by clicking a payment link in the email they receive or by logging into Clio for Clients, which will show a summary of all their invoices, both paid and unpaid. To pay their invoices electronically, make sure to first activate [Clio Payments](#) in your Clio Manage account.

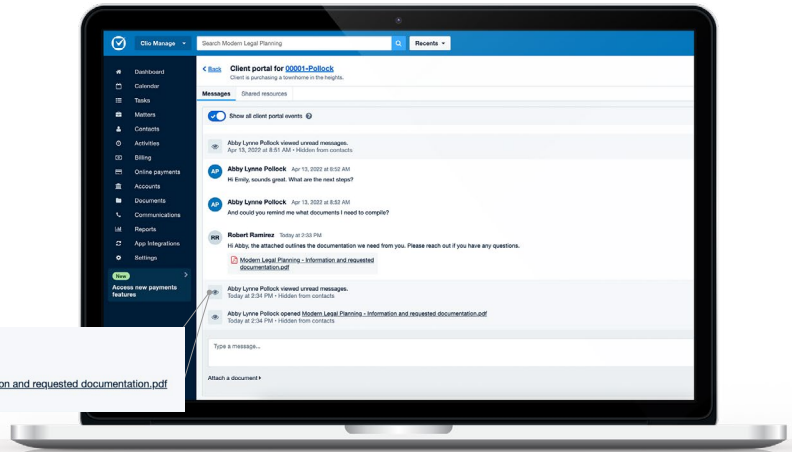


Deliver great client communications

You can add multiple firm members to your client portals in Clio Manage to create visibility and share communication responsibilities.

From the Communication tab in Clio Manage, you can see when clients have viewed messages and opened documents, so that you know if and when you need to follow up.

- Abby Lynne Pollock viewed unread messages. Today at 2:34 PM • Hidden from contacts
- Abby Lynne Pollock opened Modern Legal Planning - Information and requested documentation.pdf Today at 2:34 PM • Hidden from contacts



TIPS AND BEST PRACTICES

Before creating your first client portal:

Include the link to Clio for Clients (clients.clio.com) on your website for easy client access.

Once they log in, they'll only have access to the information you've shared with them.

Sign up for [Clio Payments](#) so your clients can pay from the portal.

Download the [Clio for Lawyers and Law Firms mobile app](#) to respond to client messages when on the go.

When creating a client portal:

When creating a new matter, [create a client portal](#) right away to ensure all documents, invoices, and calendar events get shared to the client portal.

[Add other firm members](#) to a client portal for collaboration.

[Create and share a documents folder](#) to your client portals to keep documents organized.

Encourage clients to use the mobile app's document scanner to ensure multi-page documents get combined into one PDF.

With each new client, introduce Clio for Clients by sharing a brief message. Below is a blurb you can copy and tailor for your firm:

Hi [client name],

To keep all information about your case organized and accessible to you at all times, we've created a secure online portal, which you can access using a service called Clio for Clients.

This portal will allow you to privately send and receive messages, review and share documents, keep track of important dates and events, and pay invoices via credit card, debit card, Apple Pay, or Google Pay.

When we share a new item with you, you'll receive an email notification with a link to access the portal. You can access the portal using your web browser or the Clio for Clients mobile app, which is available—at no cost—for both [Apple](#) and [Android](#) devices.

You can learn more about Clio for Clients, and see how it works at clio.com/clients.

If you have any questions, please don't hesitate to reach out [insert your firm's preferred contact method].

Sincerely

[Law Firm Name]

