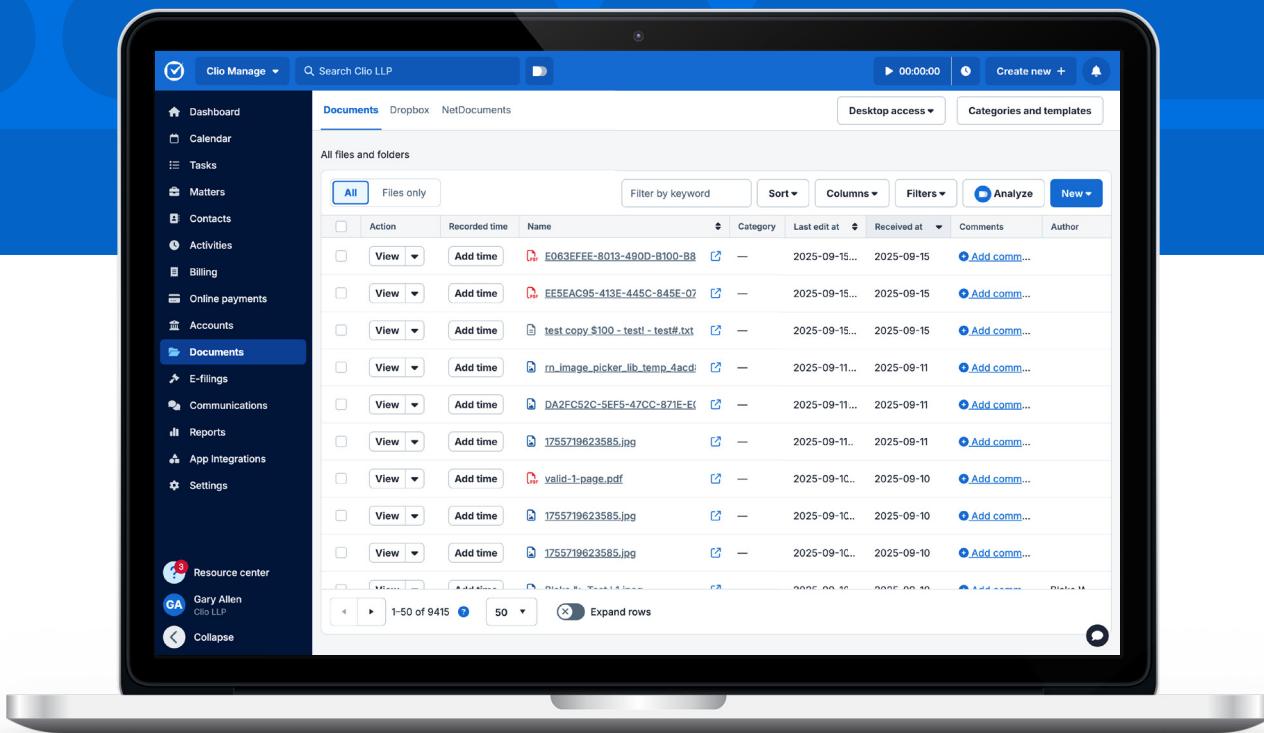




# Document Management Best Practices



Securely manage your case files from anywhere.

*Clio Manage offers secure, unlimited cloud storage on all plans.*



“

Clio allows for solid, structured file and document management with ease of access from any computer with internet access.

Chris Watkins  
Cheeley Law Group

Managing legal documents can slow your firm down. Here's how you can make working with your documents easier:

- **Your case files, all in one place.** Keep client data confidential with secure cloud storage while ensuring all your video, image, text, and audio files are backed up.
- **Access legal documents from anywhere.** Go paperless and eliminate the hassle of downloading, printing, and scanning documents.
- **Never misplace a document again.** Instantly search and find case files, whether you're in the office, courtroom, or on the go.



# Get Started

## Step 1

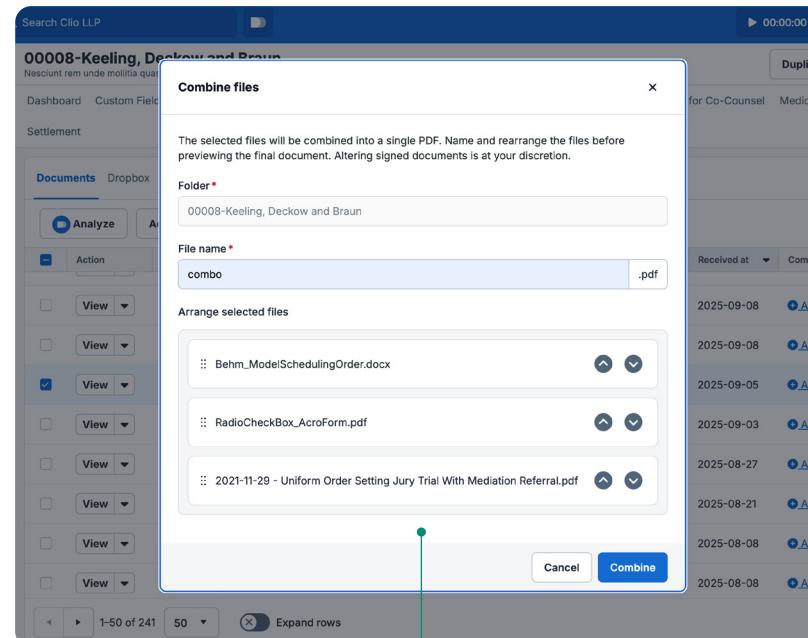
Head to the documents tab of the matter to start managing your files, [upload](#) a document, or organize them into [folders](#).

## Step 2

Prepare documents for [e-signature](#) by dragging the signature and date fields into your document. For Microsoft Word files, [convert](#) them to a PDF first.

## Step 3

Securely [share](#) documents with a colleague using an internal link, with clients through the secure [Clio for Clients](#) portal, with co-counsel through the [Clio for Co-Counsel](#) portal or by email.



### Pro Tip

[Combine](#) multiple files—including PDFs, DOCX, JPGs, PNGs—into a single PDF. Just select your documents, reorder the pages, make final edits, and then click save.



# Best Practices

## When organizing your documents:

**Establish a consistent naming convention.** This determines how effectively you'll be able to find your documents. You can include the client name, case number, date opened, or lawyer.

**Set up document folders.** Keep cases organized by creating document folders when opening a new matter or working within an existing one. You can also use [matter templates](#) to automatically generate folders.

**Use document categories.** Setting up document categories can help you sort your documents by [type](#). For example: briefs, contracts, and letters.

## When searching for your documents:

**Sort documents your way.** Adjust the columns in your documents table from the columns dropdown, and sort by any column using the arrows.

**Order documents by the received date.** Use the received date column to find recent documents. You can also edit the date.

**Find your documents faster with global search.** Type keywords or phrases into your [global search bar](#) and filter the results by document name or content.

## When working with your documents:

**Choose the latest version.** When viewing a document, select a version from the dropdown and save it as the latest to ensure everyone at the firm uses the most up-to-date file.

**Duplicate a document.** From your documents table, click the dropdown next to your document and select “make a copy” to create a document without starting from scratch.

**Share document folders with clients.** If you’re using Clio for Clients, share folders through the client portal to ensure everything between your firm and client stays organized, structured, and easily accessible.

# See how Ceiba Fôrte Law Firm keeps client documents organized.



With Clio, we have everything in one place. And that makes it easier for us to better serve our clients.

Inti Martínez-Alemá  
Ceiba Fôrte Law Firm

## Why Ceiba Fôrte Law Firm loves managing documents in Clio

- Clio provides clients with access to highly confidential and privacy-sensitive documents, enabling secure document sharing between the firm and its clients.
- With Clio, they can store the client's information, documents, notes, related contacts, and organizations all in one place, which makes it easier to serve their clients.
- It's straightforward and easy to stay organized. Unlike other software, if you enter a note, it's under notes. If you upload a document, it's under documents.

Want more tips? Here are some helpful resources:

**Join the community**

Connect with other legal professionals using Clio through our forum.

**Power up with Clio**

Join us in a monthly webinar diving into best practices.

**See what's new**

Join our quarterly webinar featuring our latest product updates.

**Have questions?**

Visit [Help Center](#) or contact customer support at 1-888-858-2546

