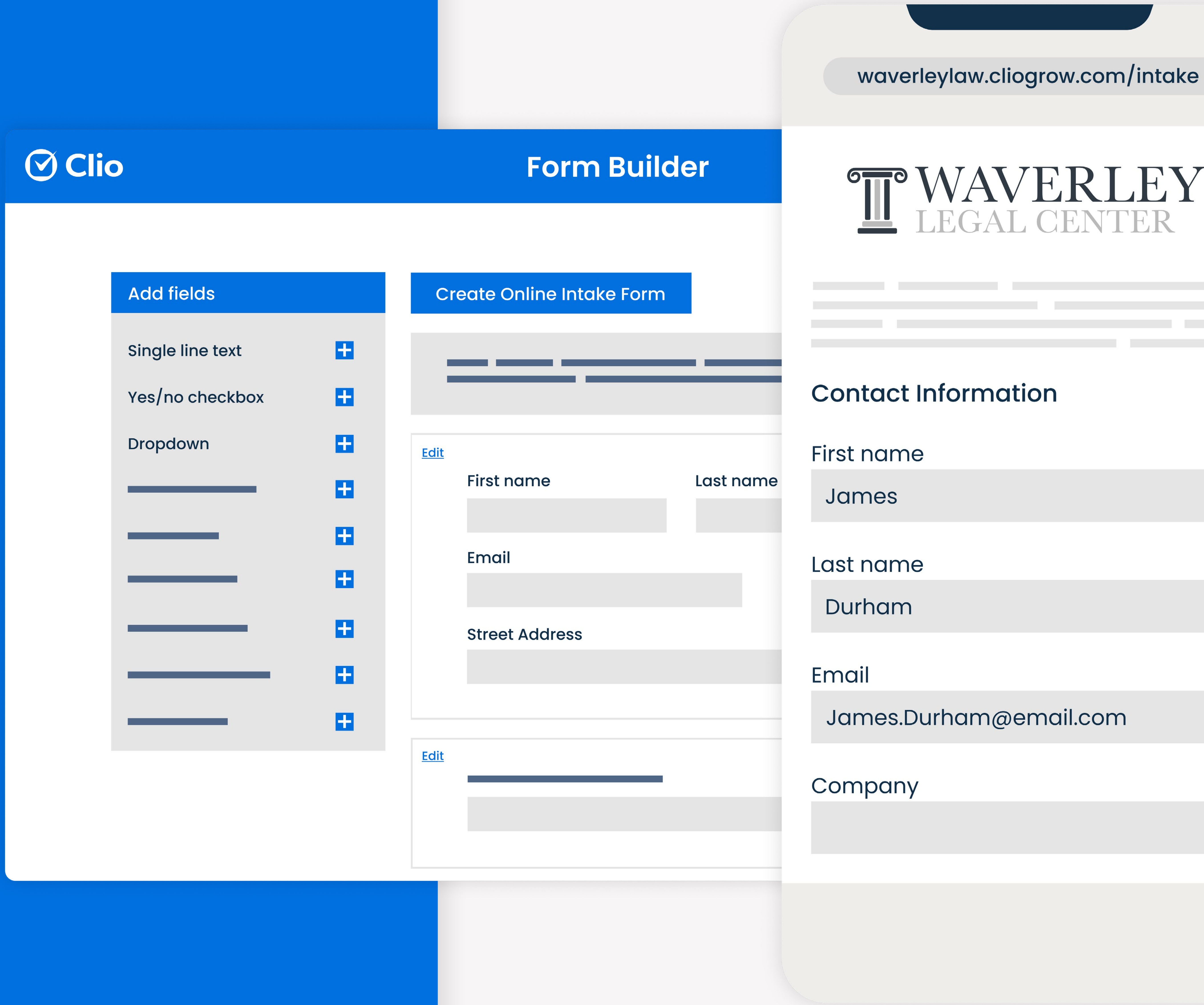
Clio

Get Started

New Client Intake



Congratulations on finishing your training session!

This session covered setting up your Clio Grow account, how to create an intake checklist, preparing and sending intake forms and documents for e-signature, and how to use Clio Scheduler.

Your next steps are to practice these action items in your Clio account prior to your next session.

- [ ] Customize your pipeline by adjusting or adding a new Matter Status
- [ ] Create a few action items on a new Intake Checklist and apply it to your fictional Matter
- [ ] Create your first Intake Form question by adding it to the General Intake Form
- [ ] Create an Appointment Type

support@clio.com

1-888-858-2546

Take some time before your next training session to complete the tasks on the previous page, and use the links embedded to help you through each task if needed. As always, if you have any questions, please reach out to our Support team.