



Get Started

New Client Intake



Form Builder

Add fields

Single line text +

Yes/no checkbox +

Dropdown +

+ +

+ +

+ +

+ +

+ +

+ +

Create Online Intake Form

Edit

First name Last name

James

Email

James.Durham@email.com

Street Address

Edit

waverleylaw.cliogrow.com/intake



Contact Information

First name

James

Last name

Durham

Email

James.Durham@email.com

Company



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](#)



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.

support@clio.com

1-888-858-2546

