

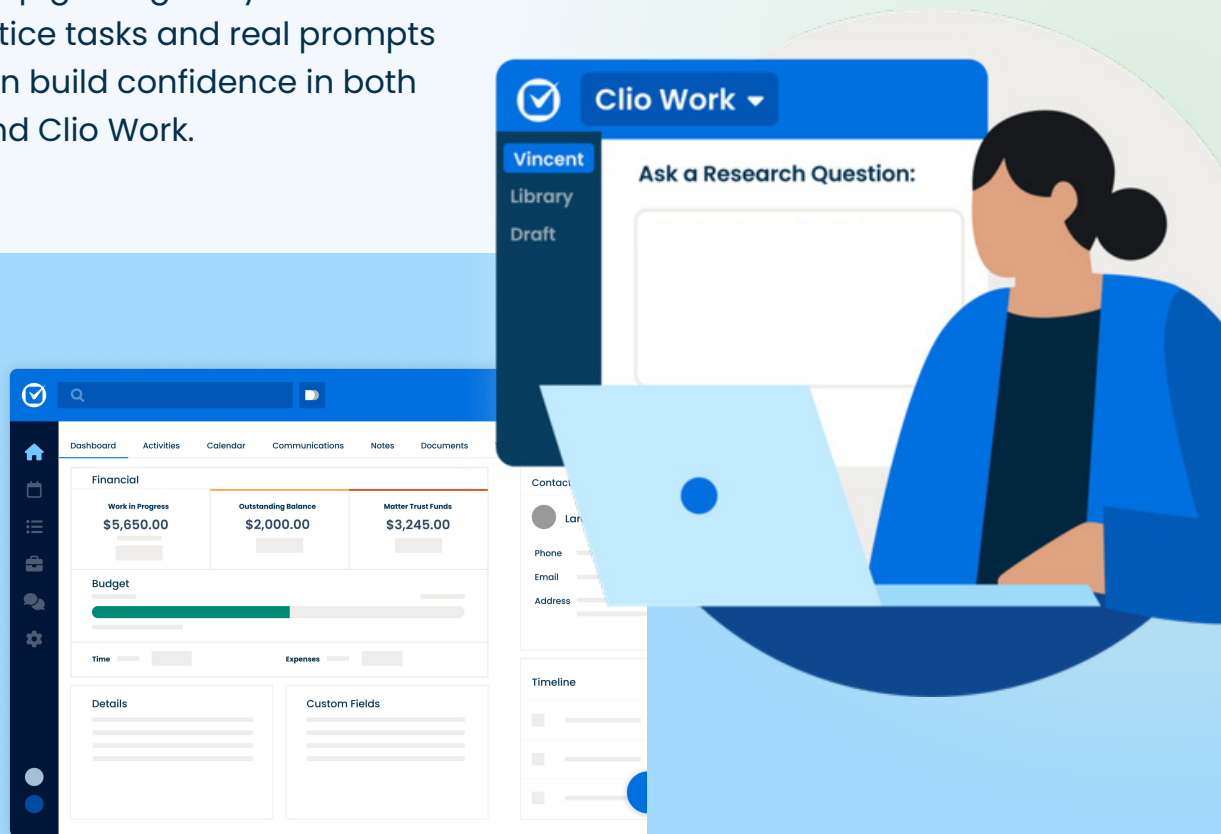


One platform for the work and business of law

PLAYBOOK

Your Post-Training Companion

This step-by-step guide gives you hands-on practice tasks and real prompts to try so you can build confidence in both Clio Manage and Clio Work.



Clio Manage keeps your firm running — manage cases, track time, bill clients, and organize documents in one place. **Clio Work** connects your matters with the world's largest global law library to deliver cited research, analysis, and case strategy you can trust. Together, they're built for how lawyers actually work.

Congratulations!

You've completed Get Started: Matters & Work. Your next step is to practice these action items in your account before your next session.

What You'll Practice



Download the Clio mobile apps

[Clio Mobile App](#) & [Vincent by Clio Mobile App](#)

1

Create a Contact and Matter

Create a contact and matter using fictional data

2

Add a Time Entry

Track a time entry or expense that will be applied to a bill

3

Upload and Organize Documents

Upload or drag and drop a document to a matter

4

Ask a Research Question

Find legal precedent with plain-language answers

5

Analyze a Document

Upload and analyze documents from your matter

6

Use Vincent Tables

Perform structured document review

7

Draft with Legal Pad

Save memos and drafts to your matter



GETTING STARTED

Clio Manage Login

Navigate to account.clio.com to login, enter your email and password.

← → ↻ <https://account.clio.com/>

Clio Manage

Sign in to Clio Manage

Email

Next: Password

Clio Work Access

Navigate to your matter, then click the Clio Work tab to open the matter-specific Vincent page.

Clio Manage | Search Espace & Aiguille | 00:00:00 | Create new +

00006-Swanson-Comprehensive Custody & Dissolution Order

Comprehensive Custody & Dissolution Order

Dashboard **Clio Work** Custom Fields Activities Calendar Communications Notes Documents eFiling Tasks Bills Transactions

Clio for Co-Counsel Medical Records Damages Settlement

Financial

Work in progress **\$0.00**
Unbilled \$0.00
Draft \$0.00
Quick bill

Outstanding balance **\$0.00**
View bills

Matter trust funds **\$0.00**
New request

Time - **Add time** | Expenses - **Add expense**

AI Actions

Ready for review

Review draft events **Scheduling**
9 events have been extracted from Comprehensive Custody & Dissolution Order.pdf
Review events

Take action

Custody Pretrial Strategy **Research**
Identify governing custody standards, temporary orders, parenting plans, and discovery tools applicable at the pretrial stage to position Ron Swanson for

Details

Matter description Comprehensive Custody & Dissolution Order

Conflict Checks
Link conflict check **Run conflict check**



TASK 1

Create a Contact and Matter

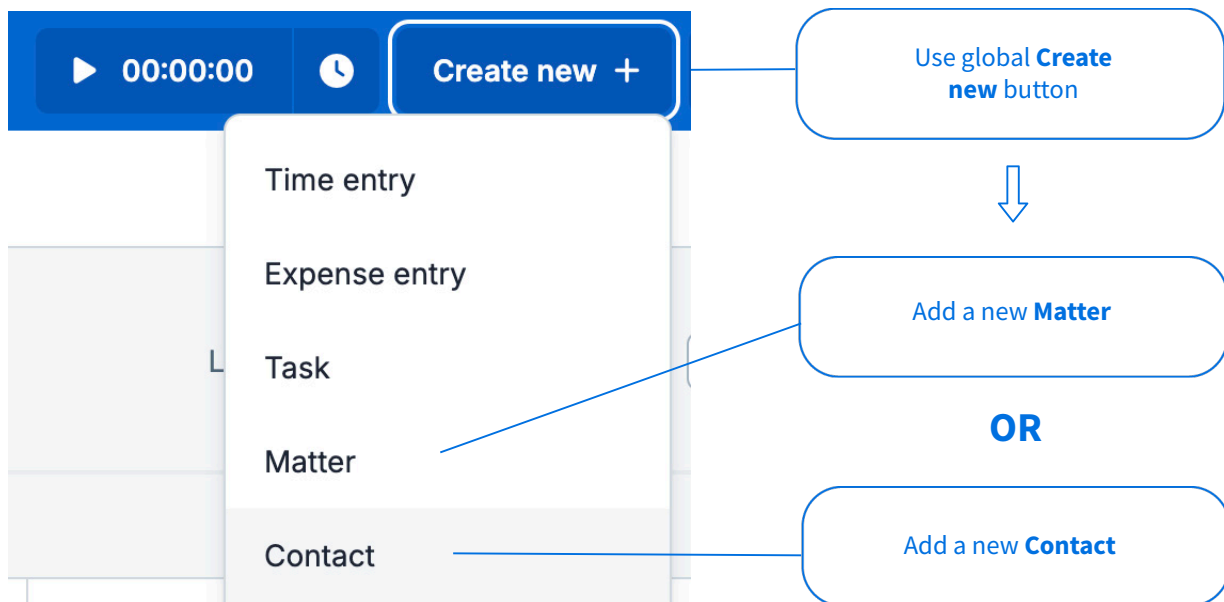
Your contacts and matters are the foundation of everything in Clio Manage. Practice creating both from scratch so your client and case records are ready to go.



Watch

[Create a Contact](#)

[Create a Matter](#)



Try it out

*When adding a new contact, go straight to matter creation by selecting '**Save and create new matter**'*



TASK 2

Add a Time Entry

Logging time and expenses accurately keeps your billing on track from day one. Practice adding a time entry using the Timekeeper and recording an expense against your Matter.



Review

How to Add a Time Entry in Clio Manage

New time entry



Duration ?

1h 12m, 1:12...

▶ 00:00:00

Matter

Find a matter by matter name or client

Select the matter from the dropdown

Activity category

Find a category

UTBMS task code

Find a UTBMS code

Description

Date *

04/24/2026

Firm user *

Legal Assistant

Add a brief description

Rate * ?

250.00

/ hr

Custom rate

Non-billable ?

Show this entry on the bill

Save entry

Save and create another

Save and duplicate

Cancel

Set up activity categories

Navigate to global **Activities** page to find **Manage categories**. Here you can select **New category** to create activity categories that make adding time and expenses quick and easy.



TASK 3

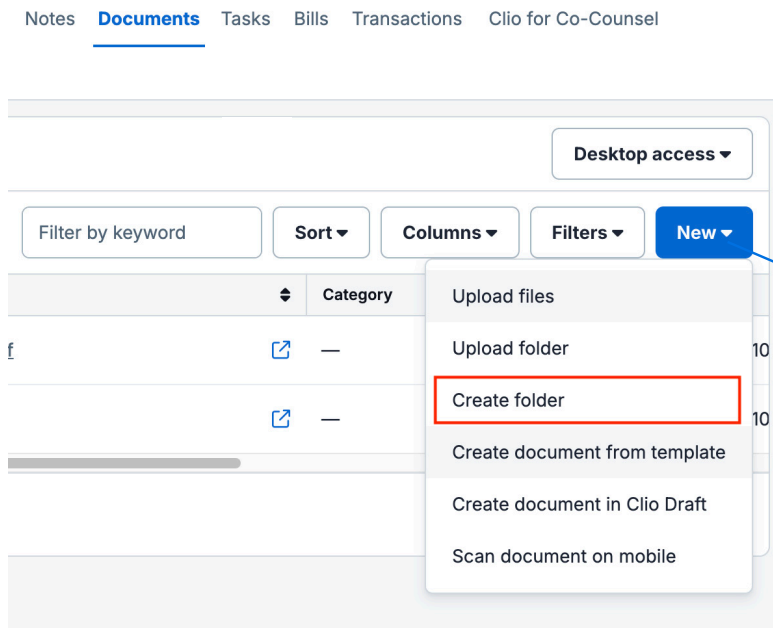
Upload a Document

Organized documents in Clio Manage unlock faster analysis in Clio Work. Practice uploading a file and creating a folder structure within your Matter.



Watch

[Upload a Document](#)



Select to upload a **file** or **folder** and create **New folders**

Supported document types

- PDF and Word documents
- Excel and spreadsheets
- JPEG or PNG files
- Audio, video and more

What Manage can do

- Unlimited storage
- Upload max 5GB per file
- Convert to PDF
- Edit right from Clio



TASK 4

Ask a Research Question

Find legal precedent that answers your questions. Vincent delivers a plain-language memo response grounded in cited authorities.



Watch

[Get Started with Vincent](#)

[Ask a Research Question](#)

The screenshot shows a search interface. At the top, there is a text input field containing the question: "What are the legal standards for proving discrimination in employment law cases in New York?". Below the input field, there is a dropdown menu showing "United States (New York)" with a blue arrow button to its right. Below the input field, there is an "Examples" section with four example questions, each in a light gray box with a magnifying glass icon:

- What are the legal requirements for obtaining a restraining order or injunction in cases of harassment or domestic violence?
- How does the criminal justice system handle juvenile offenders, and what are the key differences from adult criminal cases?
- What is the trade secret law regarding former employees allegedly stealing customer lists?
- What are the legal standards for proving discrimination in employment law cases?

Three callout boxes with blue borders and rounded corners point to specific elements:

- The first callout points to the main question input field and contains the text: "Type your question in plain language".
- The second callout points to the "United States (New York)" dropdown menu and contains the text: "Set the jurisdiction to match your state or federal court".
- The third callout points to the "Examples" section and contains the text: "Click on any example question to auto-fill and get started quickly".

Try these prompts


- "What are the legal requirements for obtaining a restraining order in [your state]?"
- "What is the standard for summary judgment under [your jurisdiction] rules?"
- "What are the grounds for modifying a child custody order?"

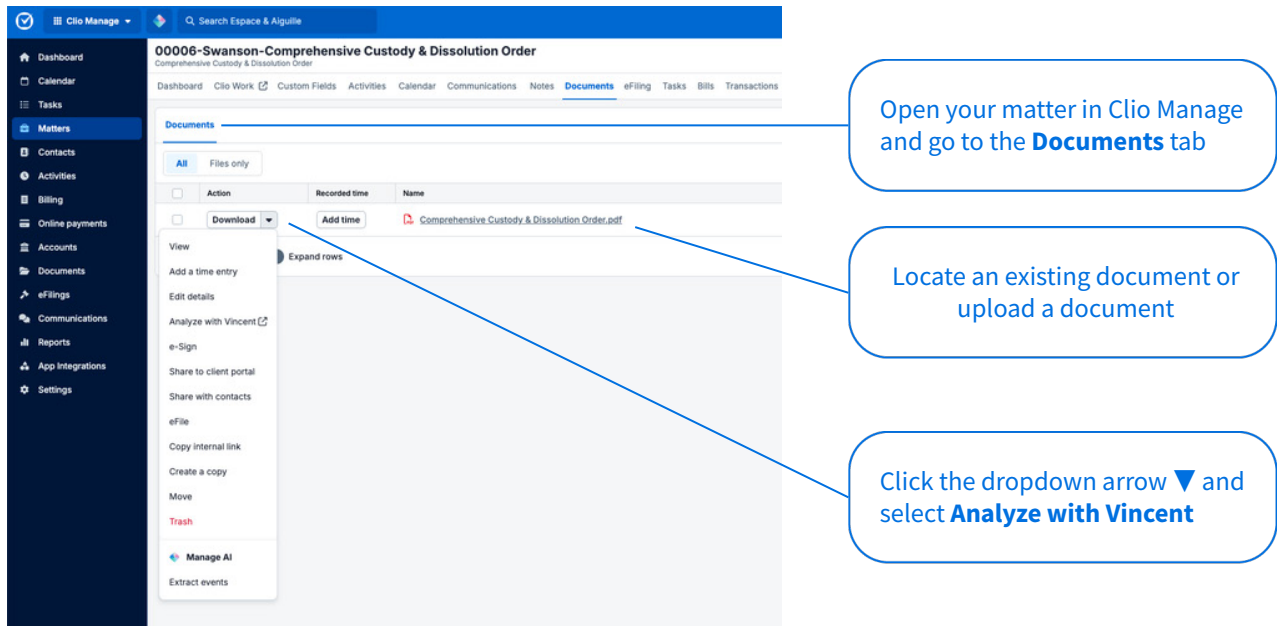


TASK 5

Analyze a Document

Upload a document to your matter in Clio Manage, then right-click the document to access the analysis option from the context menu.

 **Watch** [Analyze Legal Documents](#)



Open your matter in Clio Manage and go to the **Documents** tab

Locate an existing document or upload a document

Click the dropdown arrow ▼ and select **Analyze with Vincent**

Supported document types

- PDF contracts and agreements
- Court filings and complaints
- Discovery documents
- Custody or dissolution orders

What Vincent can do

- Extract key facts and dates
- Identify relevant legal issues
- Summarize document contents
- Flag important clauses or terms



TASK 6

Use Vincent Tables

Perform structured document review with Vincent Tables. Choose from pre-built templates or give Vincent a clear prompt describing the analysis you need, and let it build a table for you.



Watch

Compare Documents and Use Vincent Tables

Start from scratch



Start with an empty table

Build a table manually



Let Vincent build a table for you

Upload documents and let Vincent detect the structure

Build a custom table or let Vincent detect the document structure

Use a template

Select a table structure that matches your task

Vincent Templates

User Templates



Search Templates



Commercial Lease Agreement Review

Comprehensive analysis of US commercial leases covering key terms, obligations, financial provisions, and statutory compliance. Includes detailed review of tenant/landlord rights, property use restrictions, and termination conditions. (20 columns)



Contract Due Diligence

Systematic review of commercial contracts examining enforceability, key obligations, and risk factors. Includes analysis of financial terms, change controls, and compliance requirements. (20 columns)



Credit Agreement Review

In-depth analysis of US credit facilities examining loan structure, financial terms, security arrangements, and borrower obligations. Includes review of covenants, events of default, and lender remedies. (23 columns)



Document Snapshot

General description of each document (1 column)



Master Services Agreement Review

Comprehensive analysis of US master services agreements covering service scope, performance standards, financial terms, and risk allocation. Includes review of IP rights, data protection, and liability frameworks. (22 columns)



NDA Review

Detailed review of US non-disclosure agreements examining confidentiality scope, obligations, exclusions, and enforcement. Includes analysis of permitted uses, term duration, and breach remedies. (22 columns)

Use a pre-built template that matches your document type


Each template shows the analysis description and column count



TASK 7

Draft with Legal Pad

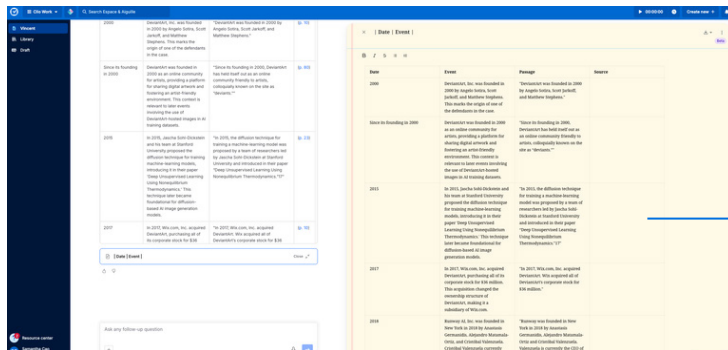
Prompt Vincent with a clear drafting request or run a document analysis, then use Legal Pad to edit the results, save to your matter, or download as a Word file.

 **Watch** Draft with Legal Pad



Find and click the **Legal Pad** (edit) icon to begin drafting

Use **Save to matter** to add the document directly to your matter



Draft in real time next to your research results

When to use Legal Pad

- Refining a research memo
- Polishing a first draft of a letter
- Customizing a strategy document
- Reviewing extracted data before filing

Legal Pad can...

- Edit Vincent's output before saving
- Format text with bold, italic, lists
- Download as a Word document
- Save directly to your matter



Your path to success

Explore pathways to master [Clio Manage](#) and [Clio Work](#) to streamline your legal practice.



IMMEDIATE SOLUTIONS

Get real-time answers 24/7 with our AI support agent or search our Help Center for step-by-step instructions on specific features.

[CHAT WITH OUR AI SUPPORT AGENT](#)

[SEARCH HELP CENTER](#)



APPLIED MASTERY

Move from features to workflows with visual walkthroughs and guided paths designed to accelerate your daily practice.

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[BROWSE WORK VIDEOS](#)



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Join our live, interactive sessions to learn core workflows and optimize your practice alongside a community of peers.

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