Clio Cloud Conference

CLIO DRAFT POWER HOUR

CREATING THE IDEAL WORKFLOW

1. You can decrease the time your team spends on phone intakes using ____________________, see this article.
2. Managing cases is made easy using ___________, ___________, and ___________, available in Clio Manage, see this article for setup instructions.
3. Important Microsoft Word formatting tools include ___________, ___________, ___________, and ___________.
4. It can be helpful to identify and highlight ____________________, ______________, and ______________ in your documents before beginning the template building process, see this article.
5. Mark the appropriate order these steps should be followed to ensure data flows from Clio Grow to Clio Manage:
    a. ____ Create your intake form in Clio Grow & assign custom fields to your questions, see this article.
    b. ____ Sync your custom fields into Clio Grow.
    c. ____ Create your matter and contact custom fields in Clio Manage.
6. Matter custom fields should be used for ________________________, and not ________________________, see this helpful document for more information.
7. The best way to ensure **contact** data flows from Clio Manage into Clio Draft is (mark all that apply):
    a. ____ Using matter custom fields.
    b. ____ Using contact custom fields.
    c. ____ Using the related contacts feature when creating matters.
8. When creating a new Role Card in your Clio Draft template, the card label should be the same as the _________________________________, see this document.
9. You can insert fields into your Clio Draft templates in three different ways (1) ________________, (2) ________________, and (3) ________________, see this article.
10. Clio Draft offers 2 types of conditions: ________________, which allow you to ask your drafter a question, and ________________, which are triggered by inserted fields.

Have more questions about Clio Draft?

Visit us in the Exhibit Hall at the Level Up station!