# Collaborating with Clio Connect

Clio's Collaborating with Clio Connect Webinar is designed to show both the Attorney perspective of Clio, and the client perspective through the secure client portal, Clio Connect.

This Document will cover the basics of what is discussed in the Collaborating with Clio Connect.

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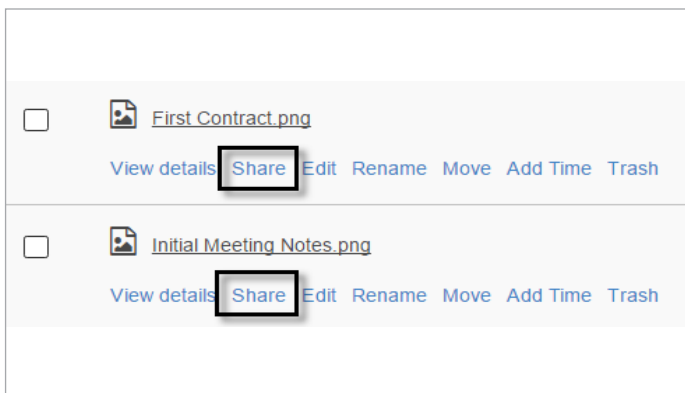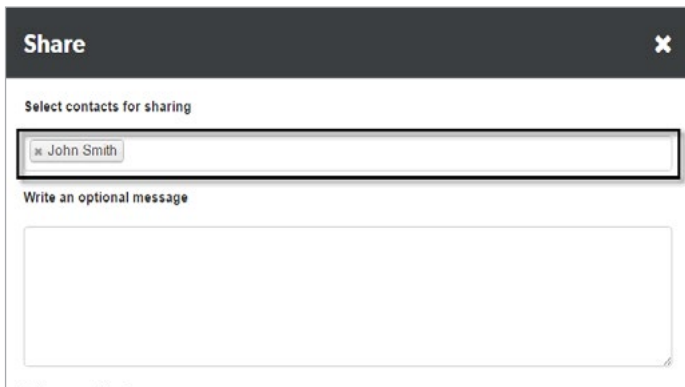
# Clio Connect

Clio Connect is a secure client portal used to share Calendar items, Tasks, Documents, and is used to facilitate Bill Payments with Credit Cards.
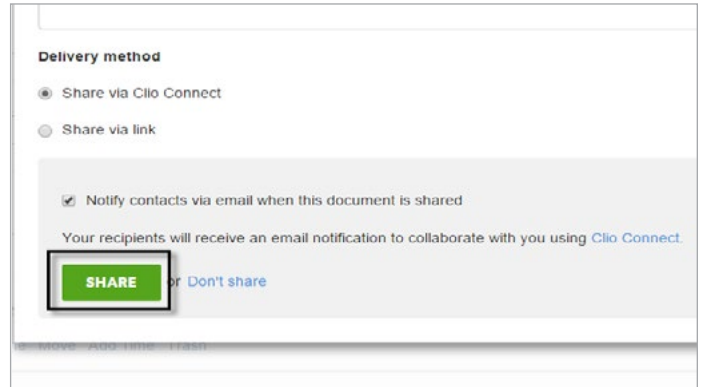
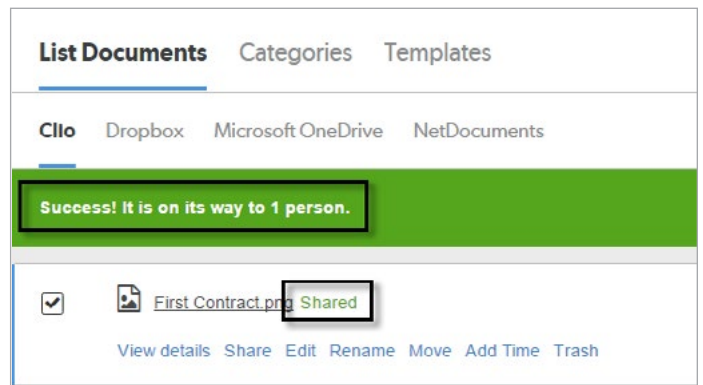1. To share an item through Clio Connect, first select the "Share" link under the item in Clio.



2. Select a Contact to share the item with.



3. Select "Share".
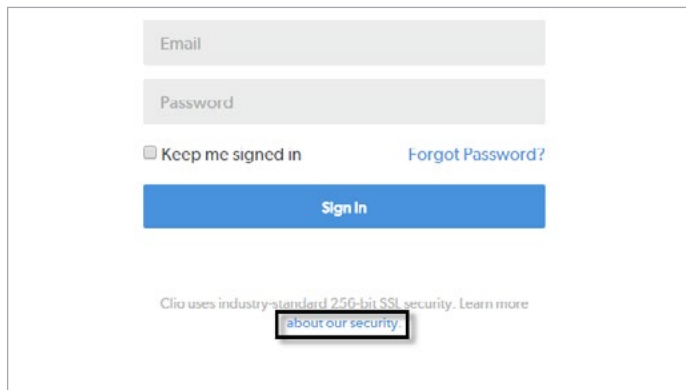


4. You will see confirmation that the item is shared.



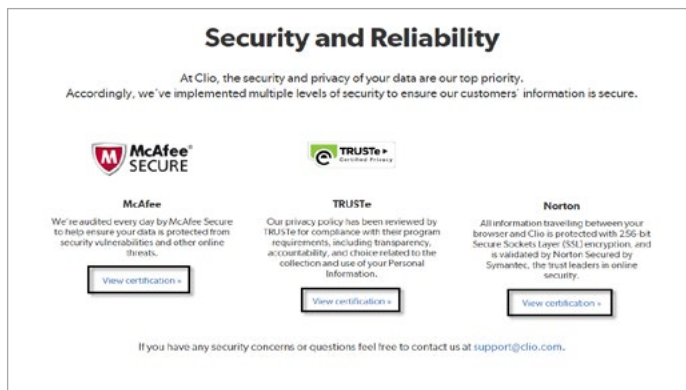More details can be read in the Clio Connect Support Articles.

# Security

Your Clio account, and client data, are protected by several layers of security.

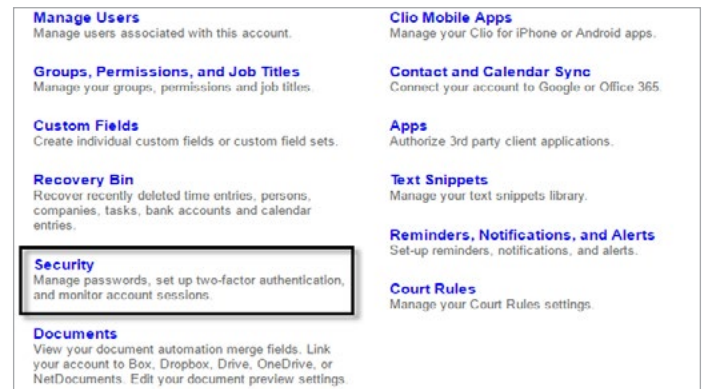1. Before you log-into Clio you can review Clio's security badges. Select "about our secuirty".



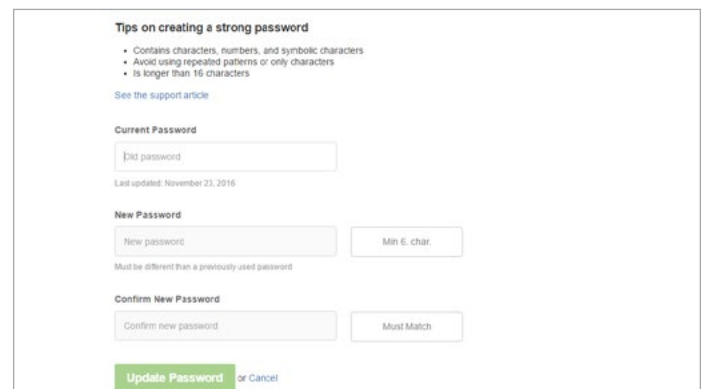2. To learn more, click View Certification.



Strong passwords can be an extra layer of security in your Clio account.

1. From Settings, under System click Security.



2. From this page, update your password or create a strong password.
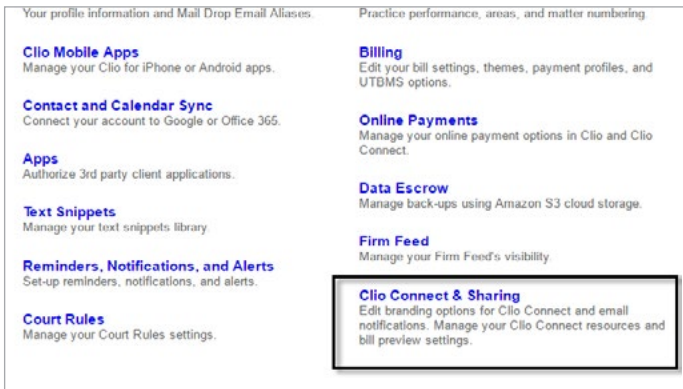


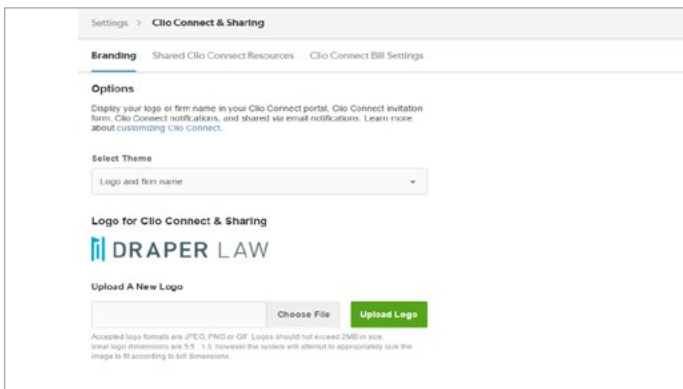More details can be read in the Clio Connect Support Articles.

# Branding

**Personalize your shared communications to effectively present your unique firm.**

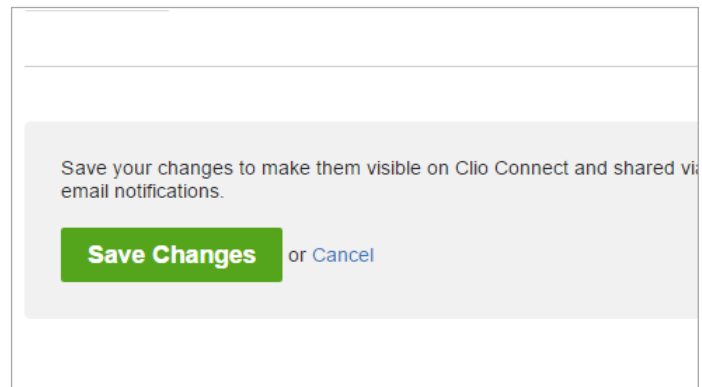1. From Settings, select Clio Connect & Sharing.



2. Select if the email template should include the Logo or Logo and firm name. If you haven't uploaded a logo, click Choose File to loacte an image on your computer



3. Preview the changes you have made by selecting the type of shared item, and then click Preview.
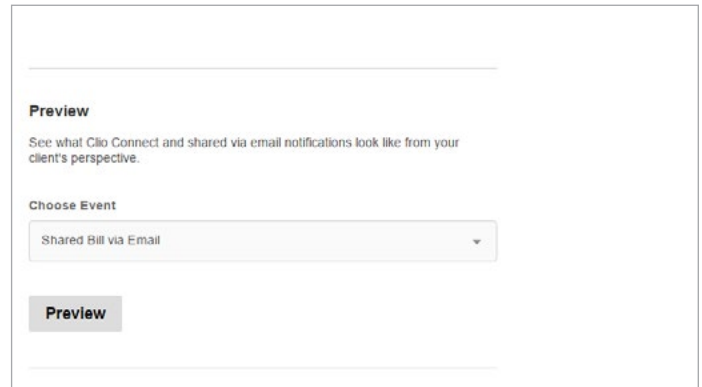


4. After any changes, click Save Changes.



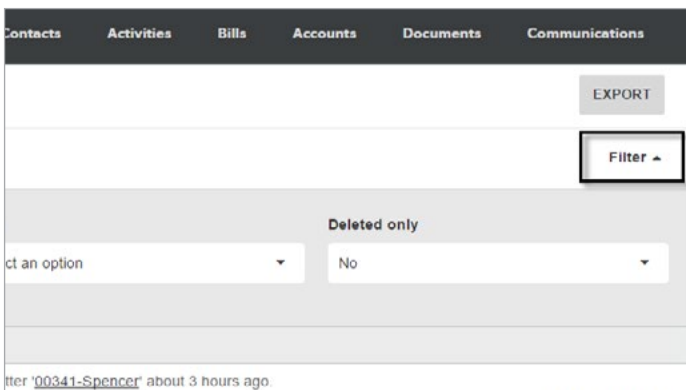More details can be read in the Clio Connect Support Articles.

# Clients and Co-Counsel

There are differences between co-counsel users and Clio connect users. Co-counsel users have had a Matter shared with them and can track billable time. Clients are limited to accessing shared items, and sharing items back to the firm. You can review the actions taken in the account by visiting the Firm Feed.
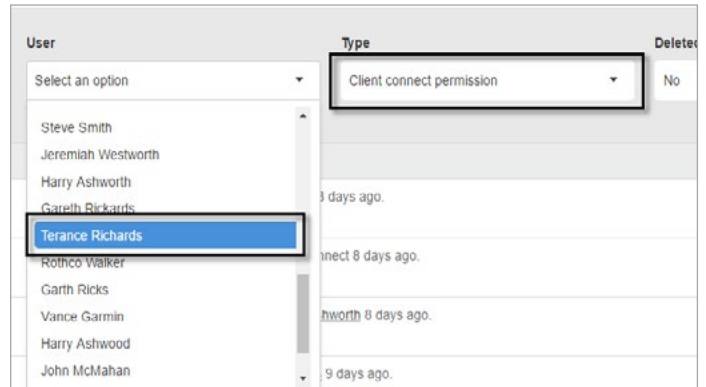
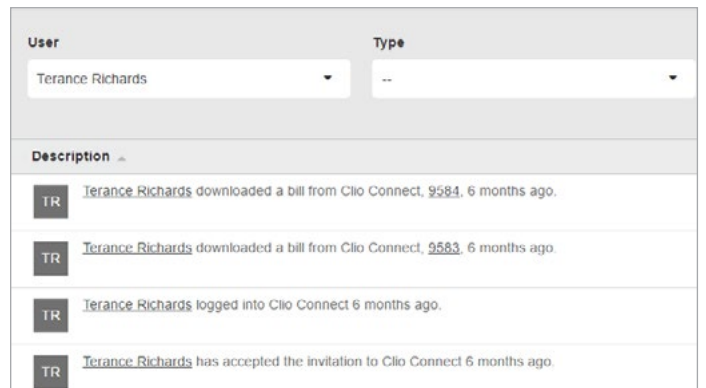1. From the Practice tab page, click Firm Feed.
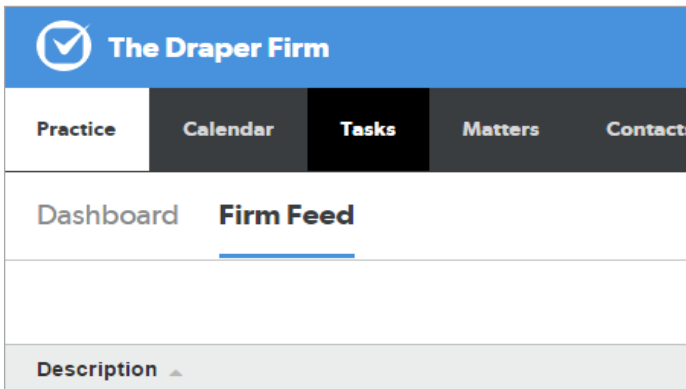


2. Select Filter on the right hand side.



3. Under User select the name of the Clio Connect user. Or, under Type, select Client connect permission.



4. Review the actions the Clio Connect user has taken in the account.
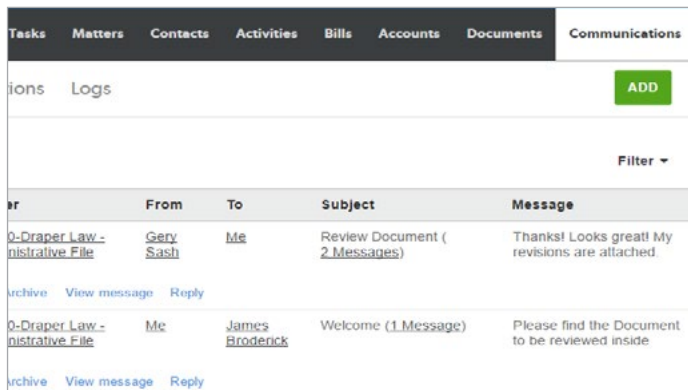


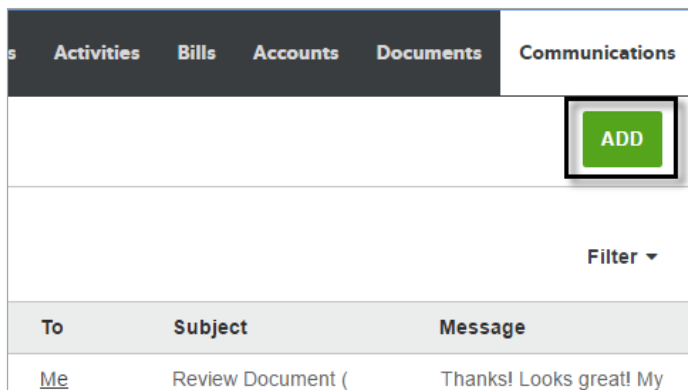More details can be read in the Clio Connect Support Articles.

# Secure Messaging

Secure Messaging inside the security of Clio's infrastructure is not only efficient, but also an important feature to take advantage of.
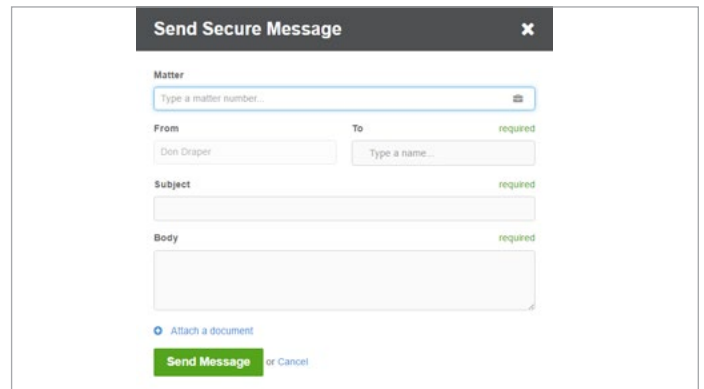
1. Select Communications at the upper right.

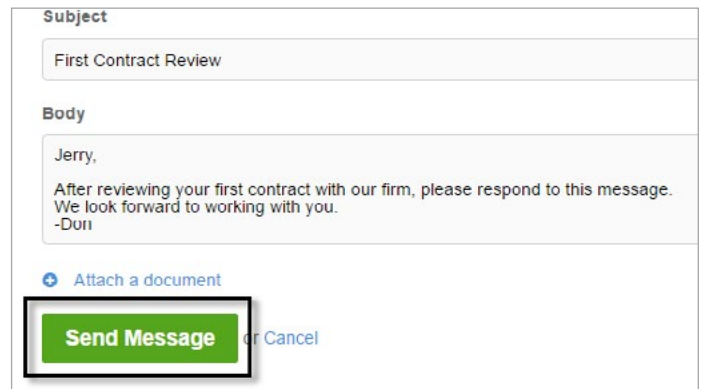

2. Click Add on the right hand side.



3. List a Mater if this communication is in connection with your client's case. Fill in the required fields which includes the recipient, the Subject, and the Body. Optionally, include an attached Document.



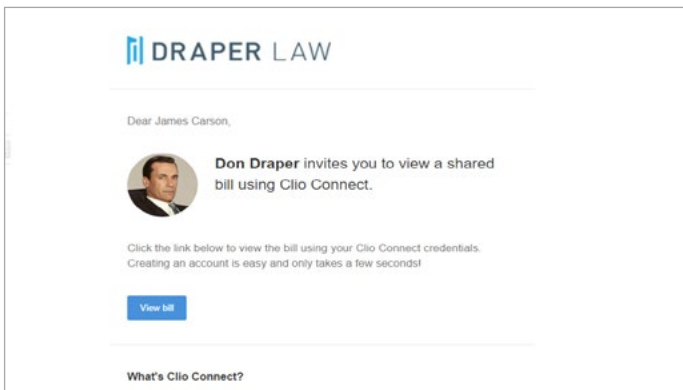3. After logging the details, click Send Message.



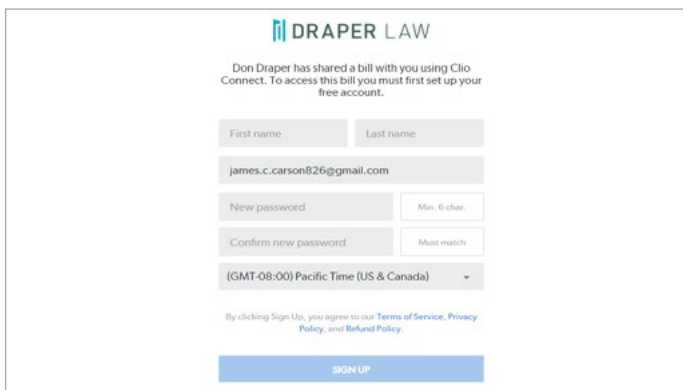More details can be read in the Clio Connect Support Articles.

# Clio Connect Perspective

When sharing an item from Clio with your Client, they will receive access to Clio Connect. While a Clio account, it will display differently from a full account.

1. Open the email, and select View Bill.



3. Once you detailed your information, select Sign Up.
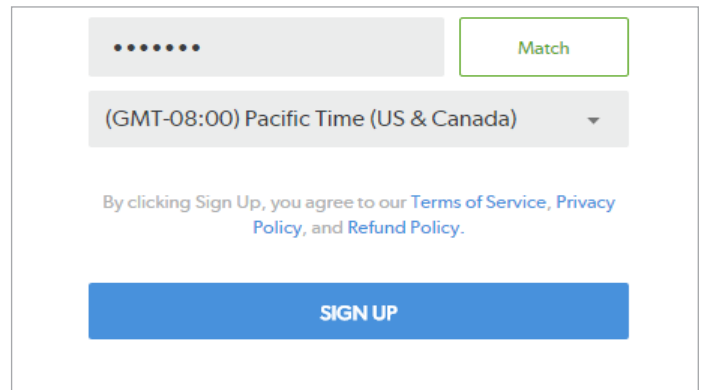


4. Once logged in, the shared information will display prominently on the page for your client to view.

2. Input your desired log-in credentials. First name and last, email, and password.
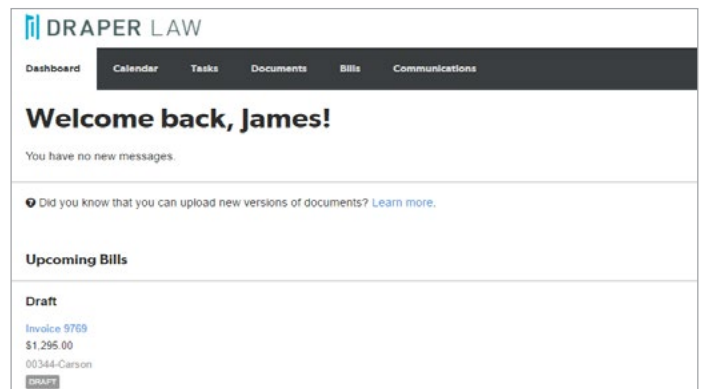




More details can be read in the Clio Connect Support Articles.

Further Training:

# Clio Product Pro

## A guided learning Experience

After our Webinar, our users should feel more comfortable using our standard tools. For a more in-depth training experience, give Clio Product Pro a try!

Clio Product Pro Certification provides the opportunity to learn the ins and outs of Clio through a self-paced, guided learning experience. You'll start things off with an understanding of what it really means to work "in the cloud" and how to do so ethically and securely. Then, we'll explore all of our features and functions to ensure that you are absolutely comfortable managing your practice in Clio.

Sign up today at clio.com/clio-product-pro

**Clio**®
Product Pro