Document Automation Webinar

Clio's Document Automation Webinar is designed to give a review of the basic functionality used to create Documents from Templates in Clio. In this session we discuss how to work with Templates efficiently and effectively.

This Document will cover the basics of what is discussed in the Document Automation Webinar.

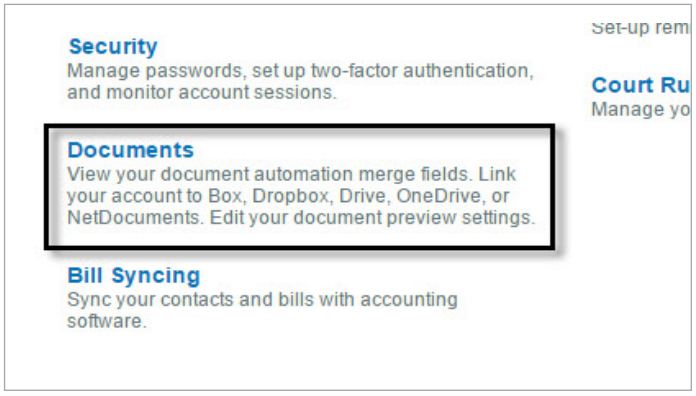
www.clio.com

Table of Contents

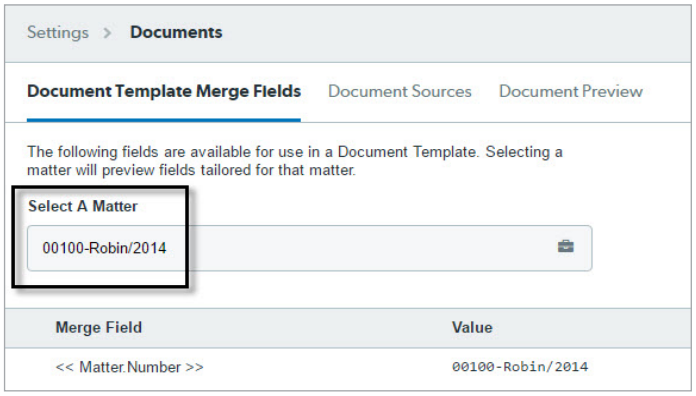
Merge Fields

Using Merge Fields you can pull Contact, Matter, Firm, Attorney, and Custom Field information into your automated Template documents.

1. From the Settings page, select "Documents" under the "System" column.



2. Choose your example Matter.



3. Review the displayed Merge Fields and the information they are connected with.

Merge Field	Value
<< Matter.Number >>	00100-Robin/2014
<< Matter.Description >>	Stolen Honey.
<< Matter.ClientReferenceNumber >>	011234123
<< Matter.ResponsibleAttorney >>	Steve Smith
<< Matter.ResponsibleAttorney.Name >>	Steve Smith

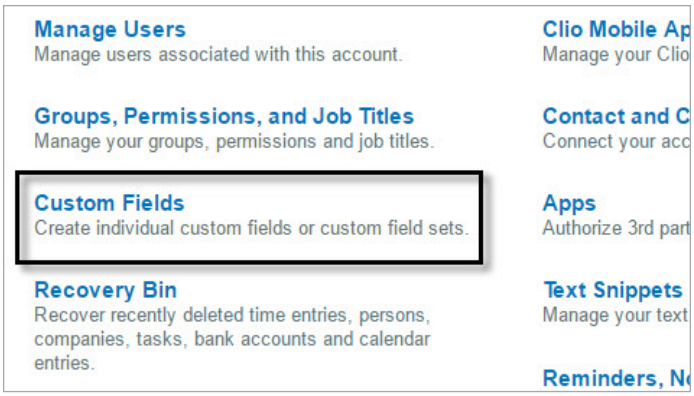
4. Once you find your desired Merge Field, click the clipboard icon to copy your information.

More details can be read in the Document Automation Support Articles.

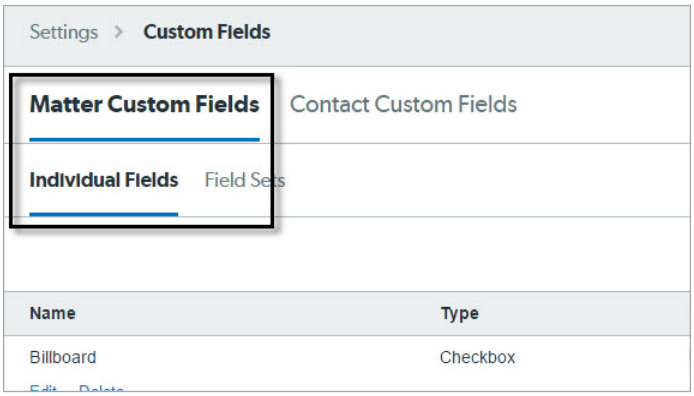
Custom Fields

Default Fields hold the basics such as Address information and Billing information. Custom Fields hold what you would like to track beyond the basics, such as a Lead Source or Date of Birth.

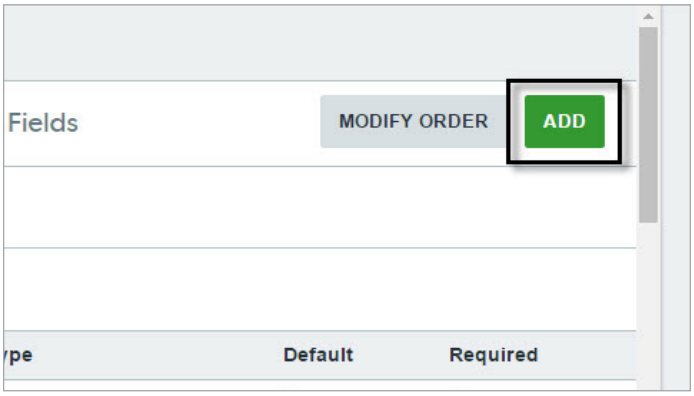
1. From Settings, select "Custom Fields" under System.



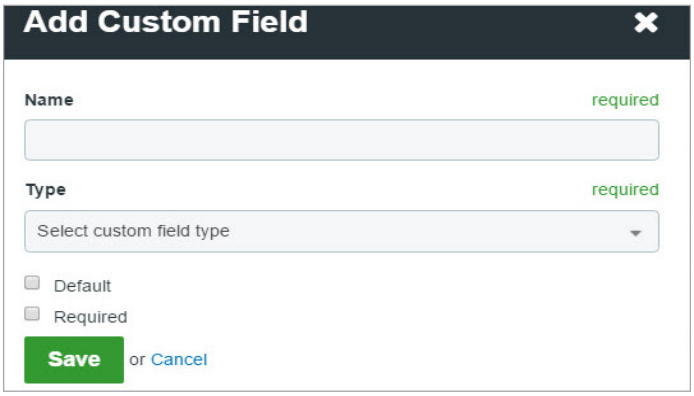
2. From Custom Fields, choose either "Matter Custom Fields", or "Contact Custom Fields".



3. Select "Add" at the upper right to create a new field.



4. Include a name for the Custom Field, and select a "Type". Once finished, select "Save".

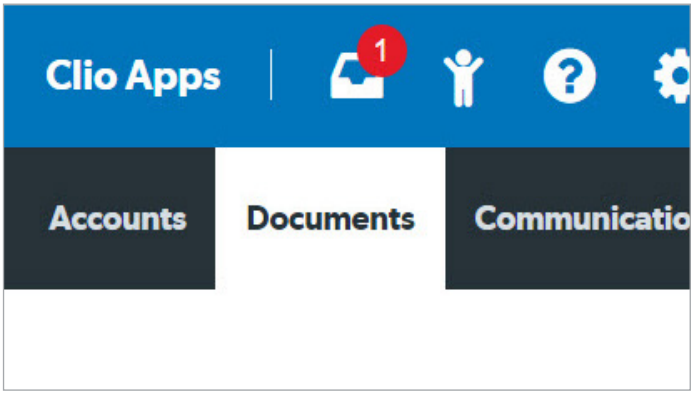


More details can be read in the Document Automation Support Articles.

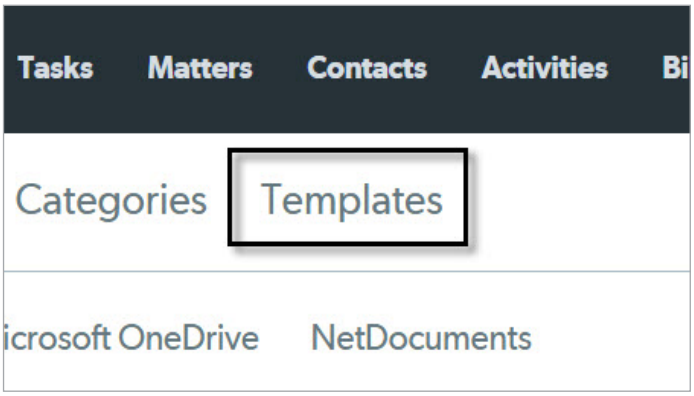
Templates

Any Documents your firm works with regularly such as Letters, Contracts, or Intake Forms, can be used as Templates in Clio.

1. Select "Documents" at the top of Clio.

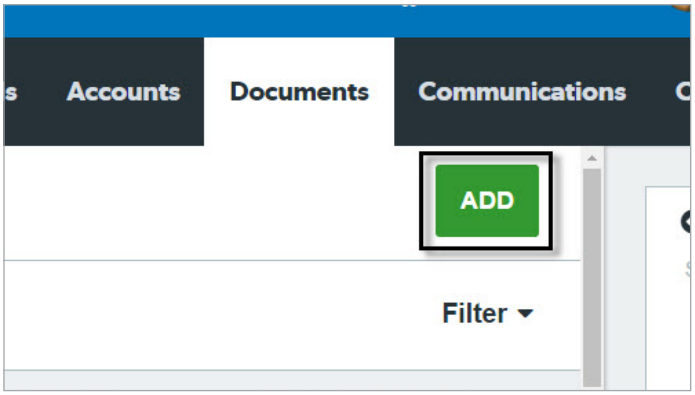


2. At the upper left of the page select "Templates".



3. Review your list of Templates. Select "Edit", to add a Category, or select "Delete" to remove the Template.

4. Click "Add" at the upper right of the page to include a new Template.

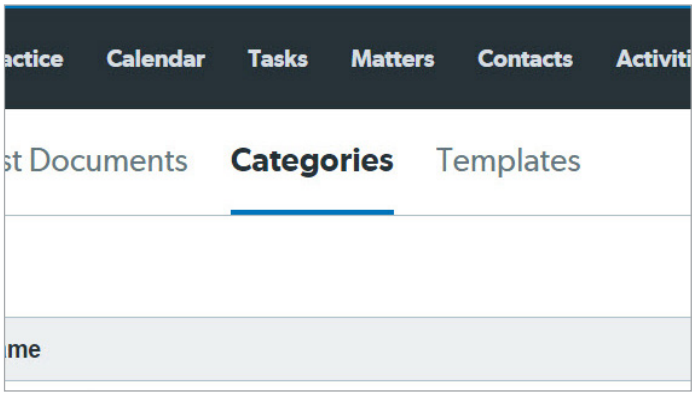


More details can be read in the Document Automation Support Articles.

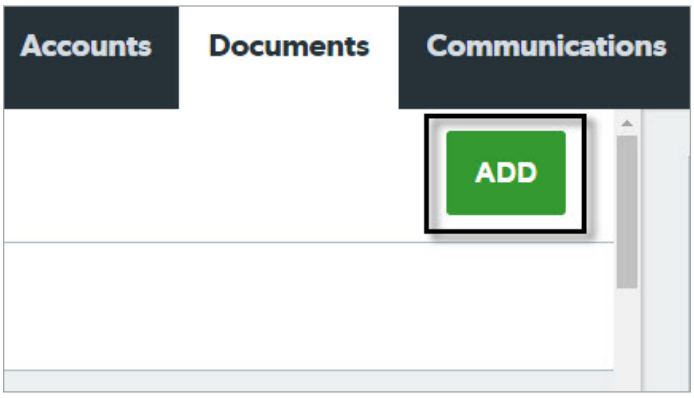
Categories

Categories can be applied to Documents to allow for better sorting, filtering, and categorizing.

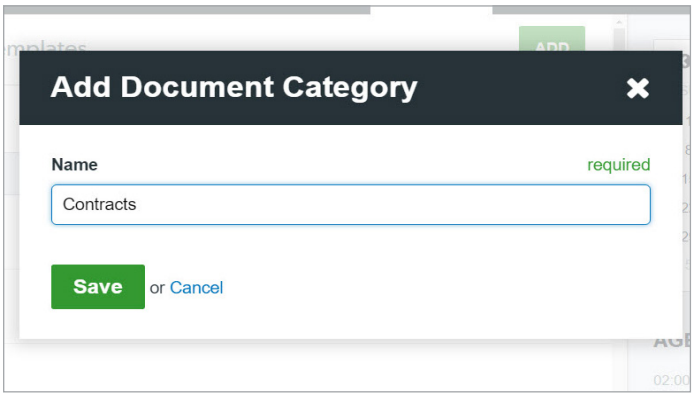
1. From Documents, select "Categories".



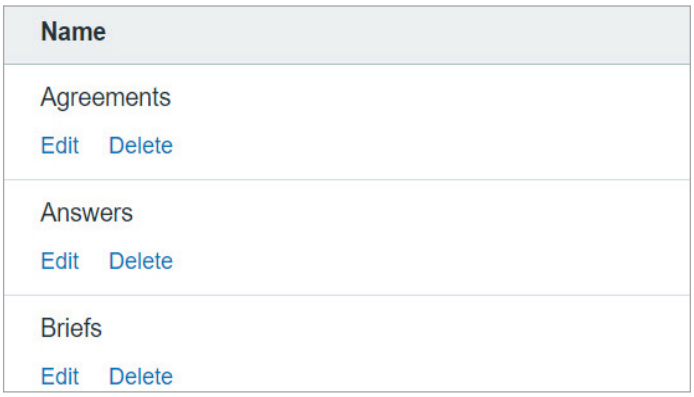
2. To create a new Category, select "Add" at the upper right.



3.Create a Category name, and select "Save".



4. Review your list of Categories, and select "Edit" or "Delete" on the ones you want to modify or remove.

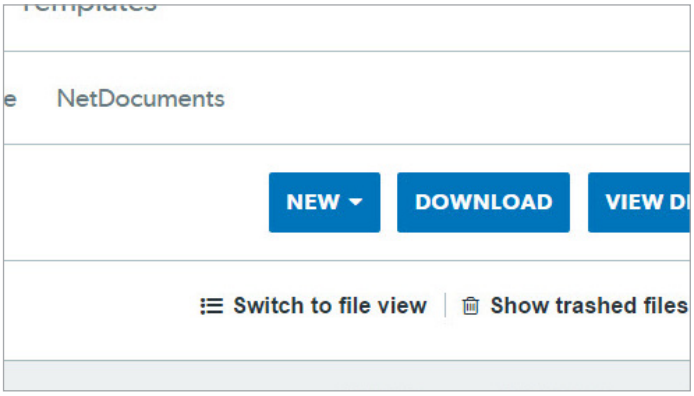


More details can be read in the Document Automation Support Articles.

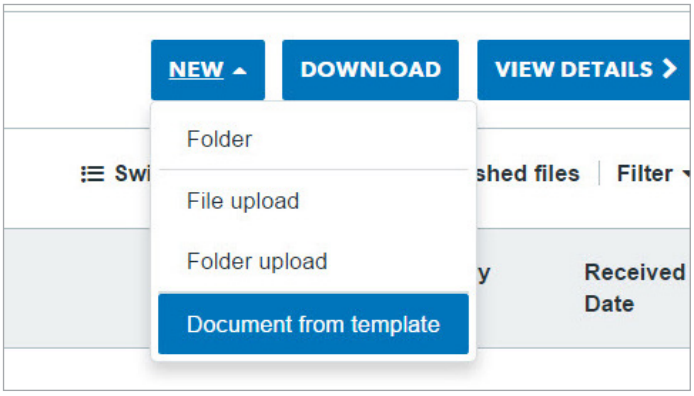
Generating Documents

Documents in Clio are found from the main Documents tab, under the Contacts Documents tab, or under the Matter's Documents tab.

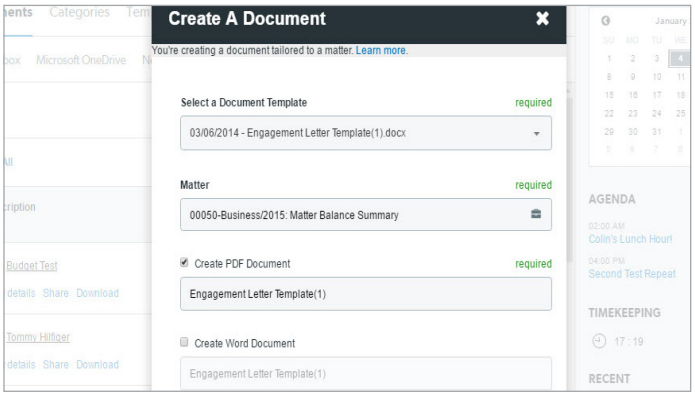
1. From Documents, select "New" on the right hand side.



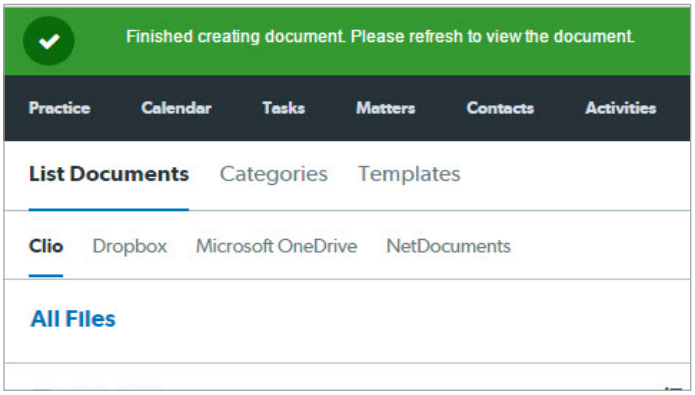
2. From the drop-down, select "Document from template".



3. From the Create a Document window, enter the appropriate information such as destination Matter, and file type. Select "Create" to generate the Document.



4. Once created, you will see the notification at the upper left of the screen. Refresh the page to see the Document.

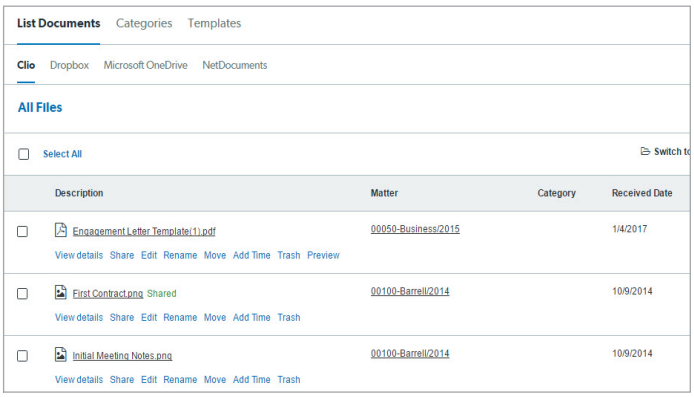


More details can be read in the Document Automation Support Articles.

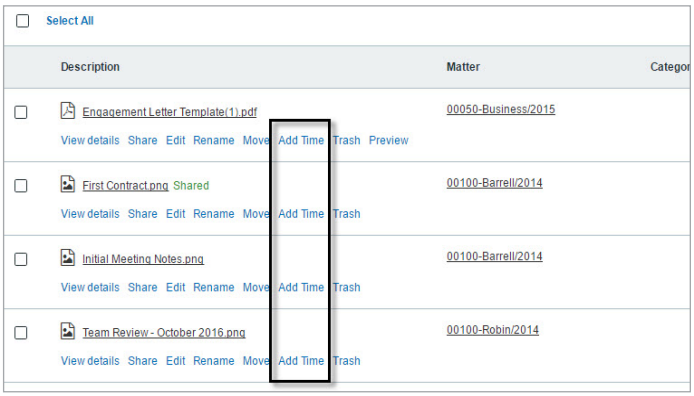
Adding Time

Time can be tracked on Documents that are uploaded and stored in Clio. These entries allow accurate tracking of work performed on your Contracts, Letters, or general Documents.

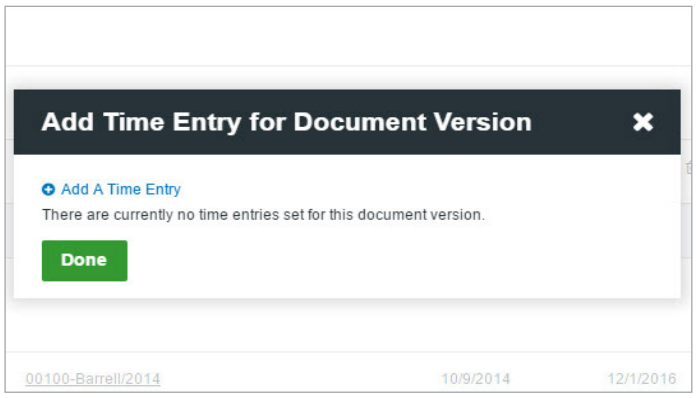
1. From Documents, review your list of files.



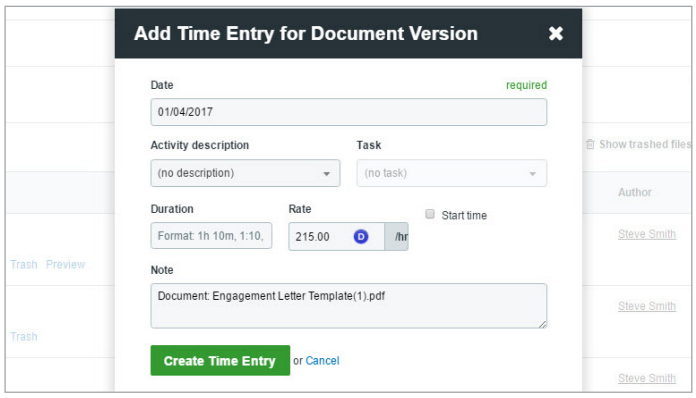
2. Select "Add Time" on a Document that you want to add entries to.



3. Click "Add A Time Entry". Once created, multiple Time Entries can be seen from this window.



4. Input your Time Entry details for your Document Version, and then click "Create Time Entry".



More details can be read in the [Document Automation 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