

Clio Connect is a secure portal where I'm able to share Documents, Calendar Events, Tasks, Bills, and Secure Messages. As we are both able to see the information shared, this is the quickest and safest way to ensure smooth communication.

Creating Your Clio Connect Account

The first time I share something with you, you'll receive an email from Clio. In this email there is a link to set up your Clio Connect account. It looks like this:

Click on the blue button and you will be taken to the screen to set up your Clio Connect account:

Click the link below to view the message using your Clio Connect credentials.
Creating an account is easy and only takes a few seconds!

[View message](#)

What's Clio Connect?

Clio Connect is a free and secure web-based client portal. Share and collaborate with individuals using Clio through an easy-to-use online interface.

Questions?

Clio's dedicated Support Team is here to help. Email to support@clio.com or call 1-888-858-CLIO, 0000 hrs to 1700 hrs PT Monday – Friday. You can also visit Clio Connect's Support Resources.



Don Draper has shared a message with you using Clio Connect. To access this message you must first set up your free account.

Jeremiah	Westworth
jerry.westworth@gmail.com	
.....	Strong
.....	Match
(GMT-08:00) Pacific Time (US & Canada) ▾	
By clicking Sign Up, you agree to our Terms of Service , Privacy Policy , and Refund Policy .	
SIGN UP	

Clio uses industry-standard 256-bit SSL security. [Learn more about our security.](#)

Fill out the fields that are on the screen and be sure to use the exact email address in the field that I used to share the item with you. You must also choose the CORRECT time zone that you are in. For most of you it will be Eastern Time.

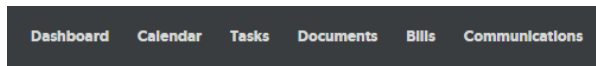
When all the fields are filled out, you can click on the green Sign Up link at the bottom of the page. This will bring you to the shared item.

The screenshot shows the Clio Connect interface. At the top, there is a navigation bar with tabs for Dashboard, Calendar, Tasks, Documents, Bills, and Communications. Below this is a green banner that says "Welcome to Clio!" and "Please respond once received." The main content area is titled "Message Detail" and shows the following information: Matter: -, Parties: Me, Don Draper. Below this is a "Messages" section with a "SIGN UP" button. At the bottom, there is a table of messages:

Received At	From	Message
02/22/2016 07:18 AM	Don Draper	Jerry, you and I will have a sit-down with the partners on Monday. Please [unread]

Inside the Clio Connect Account

You can navigate around by using the tabs at the top of the page. You will see the items that I've shared with you.



What you can do in Clio Connect

To learn about the various things you are able to do, see below:

- [Change your picture and contact information](#)
- [Document viewing, uploading new versions, uploading new documents and adding comments](#)
- [View and complete your Tasks](#)
- [View Calendar events](#)
- [View and pay bills online](#)
- [View and create Secure Messages](#)

Logging into Clio Connect

When you want to access your Clio Connect account, simply go to <https://app.goclio.com> and enter the same email you used to sign up. To sign out, simply click on your initials or picture at the upper right, and from the drop-down select Sign Out.

