

Clio® New Ways to Track Communications in Clio

What are we releasing?

Clio is redesigning and updating our entire Communications feature. Based on user-feedback and with a focus on design that captures more information with ease, Clio has implemented new benefits for firms to track both internal communications, and build out a client's case with accurate communication records and time capture.

Capture and store communications, browse and filter through records with ease, and provide a more responsive client/lawyer relationship based on succinct information and attention to detail.

What function does Clio's Communications tool serve?

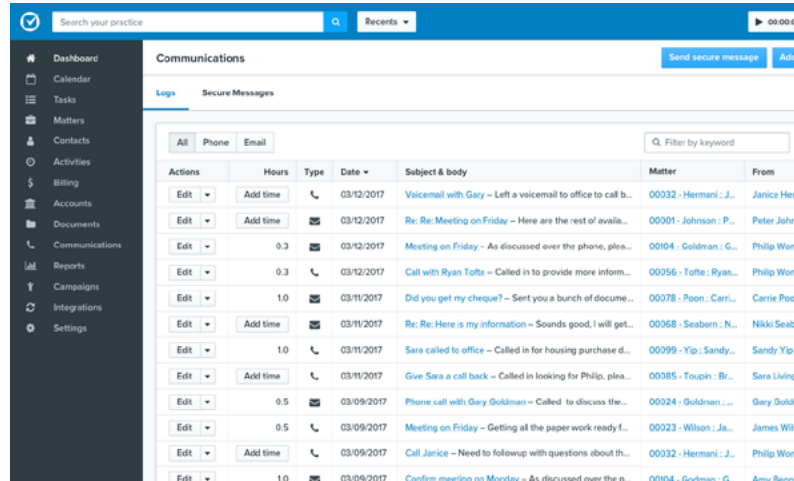
Communications in Clio is the hub of all your outgoing and incoming client and professional communications. Securely record emails and phone calls, and send/receive secure messages, while tracking every billable second affiliated with profitable tasks by Client or Matter.

What happened to the Conversations tab?

The Conversation tab has been replaced by the more intuitive, which allows you to search for specific forms of communication within the main page.

What key improvements have we made?

- Create phone and email logs from our new global navigation panel
- Send secure messages, via Clio Connect, from our new global navigation panel
- Track time in Clio from any screen while you create a phone log with client, and have this information immediately populate in your Activities log.
- The "To" and "From" fields within phone logs are interchangeable with just one click, for quick, accurate record creation.
- Access more insights with ease, as you can now view more records on communications and filter records to show phone, email logs, or a combined view of both.



Actions	Hours	Type	Date	Subject & body	Matter	From
Edit	Add time	📞	03/12/2017	Voicemail with Gary – Left a voicemail to office to call b...	00032 - Hermani : J...	Jarice Her...
Edit	Add time	✉️	03/12/2017	Re: Re: Meeting on Friday – Here are the rest of availa...	00001 - Johnson : P...	Peter Joh...
Edit	0.3	✉️	03/12/2017	Meeting on Friday – As discussed over the phone, plea...	00104 - Goldman : G...	Philip Wor...
Edit	0.3	📞	03/12/2017	Call with Ryan Toffe – Called in to provide more inform...	00056 - Toffe : Ryan...	Philip Wor...
Edit	1.0	✉️	03/11/2017	Did you get my cheque? – Sent you a bunch of docume...	00078 - Poon : Carr...	Carrie Poo...
Edit	Add time	✉️	03/11/2017	Re: Re: Here is my information – Sounds good, I will get...	00068 - Seaborn : N...	Nikki Seab...
Edit	1.0	📞	03/11/2017	Sara called to office – Called in for housing purchase d...	00099 - Yip : Sandy...	Sandy Yip
Edit	Add time	📞	03/11/2017	Give Sara a call back – Called in looking for Philip, plea...	00085 - Toupin : Br...	Sara Living...
Edit	0.5	✉️	03/09/2017	Phone call with Gary Goldman – Called to discuss the...	00024 - Goldman : ...	Gary Goldm...
Edit	0.5	📞	03/09/2017	Meeting on Friday – Getting all the paper work ready f...	00023 - Wilson : Ja...	James Wil...
Edit	Add time	📞	03/09/2017	Call Jarice – Need to followup with questions about th...	00032 - Hermani : J...	Philip Wor...
Edit	1.0	✉️	03/09/2017	Confirm meeting on Monday – As discussed over the p...	00104 - Goldman : G...	Amy Benn...

What's new with Secure Messages?

- Secure Messages are now easier to find and create. You can message a client directly from the Communications page.
- A new Secure Messages view lets you show messages sent directly to you, or to anyone at the firm. You can also filter these by Matter, read/unread, archived/unarchived, and more.

Is this available to all Clio users?

Yes, this update to Clio Communications is available to all users.



Where can I learn more about this update?

- [Clio Support website](#)
- [New Clio Experience landing page](#)