Clio Cloud Conference

Intake Mastery: Using Clio's Forms to Control the Flow

Set Up Dynamic Information Flow and Document Automation

1. **Build Automated Workflows in Grow Using Workflow Templates**

   Resource: Clio Grow Workflows & Workflow Templates

2. **Build Your List of Custom Fields**
   Starting with the documents you need to prepare in Clio Manage and set-up as Document Automation Templates, start making a list of the Custom Fields you'll need to fill in the variables in the document (ie. Case Number, County, Court Name, etc.)

3. **Create Your Custom Fields in Clio Manage**

   Resource: Custom Fields: Creating Contact & Matter Custom Fields & Sets
   Video: How to Create and Manage Custom Fields

   It is important to pay attention to the Custom Field types that work with Grow Intake Forms. The following Custom Fields in Clio Grow cannot be linked to any Clio Grow Form Builder question type:

   - Dropdown Custom Fields
   - Contact Select Custom Fields
   - Email Custom Fields
   - Integer Custom Fields
   - Money Custom Fields
   - Website Custom Fields

4. **Sync Custom Fields to Clio Grow**

   Resource: How Do I Sync Clio Manage Custom Fields in Clio Grow

5. **Build Your Intake Form and Link Custom Fields to the Form Questions**

   Resource: Form Template Builder Guide
   Resource: How to Connect Form Questions to Custom Fields in Clio Grow

6. **Create and Use Your Manage Document Automation Templates**

   Resource: Document Automation: Creating a Template
   Resource: Uploading a Template and Generating a Document from Template
   Video: Document Automation Workflow

Have more questions about utilizing technology to design efficient processes?

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