



Click to File

1 message

Aaron Pelley

Wed, Nov 29, 2017 at 7:35 AM

To: [Redacted]

Cc: Anne van Leynseele [Redacted]

If you are not using "Click to File" to document all your communications, every single day, we have two alternatives. One is you can use the Click to File with Mac Outlook email. Outlook is part of your Microsoft suite and should be loaded on your computer. The second is that you can use the tool that is integrated in Clio. If you choose this latter alternative, contact Clio for instructions. The customer support there is great.

I get that doing this with every communication is a pain and a bit of a time suck. However, I just want to clarify that tracking communications in Clio is not optional. We need to have records of all communications with Clients and it needs to be in Clio. Thanks.