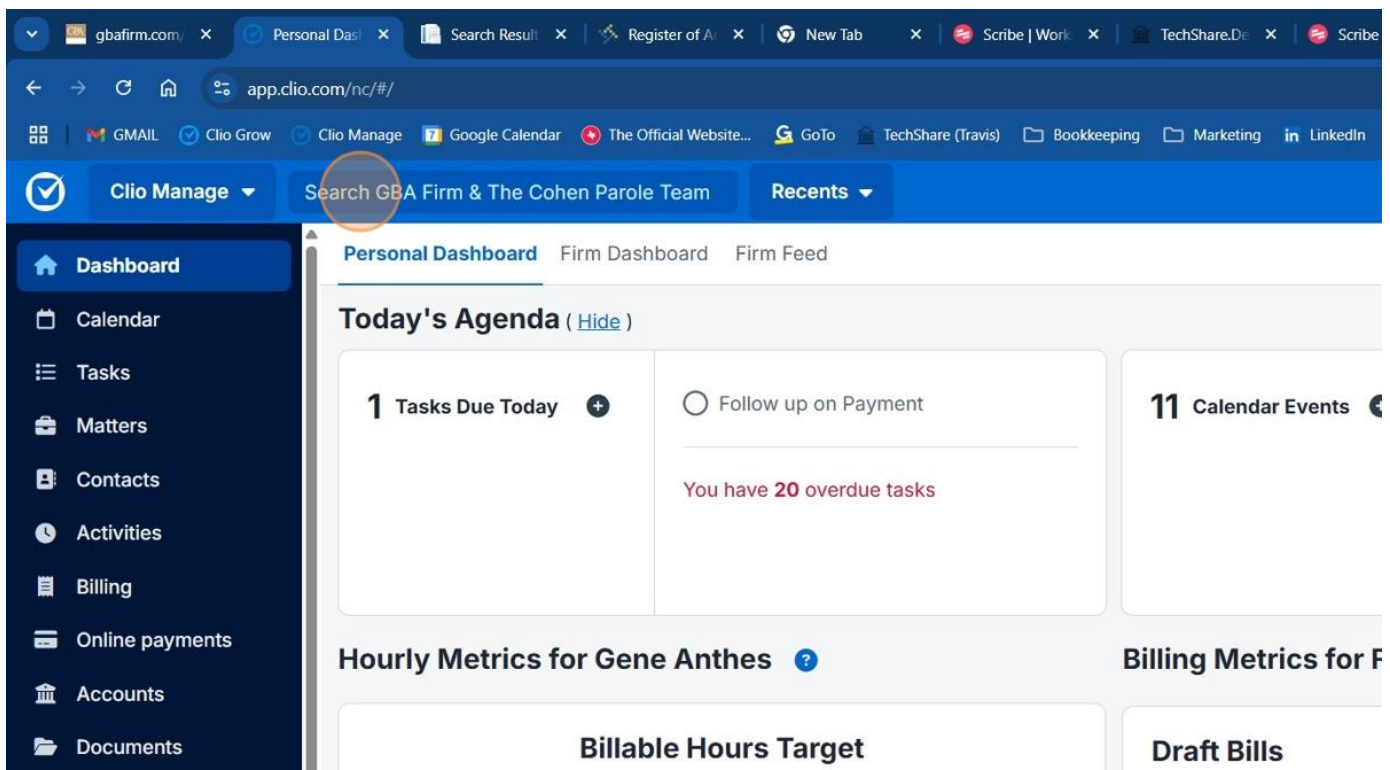


Clio - Adding A New Calendar Entry to Client's Case

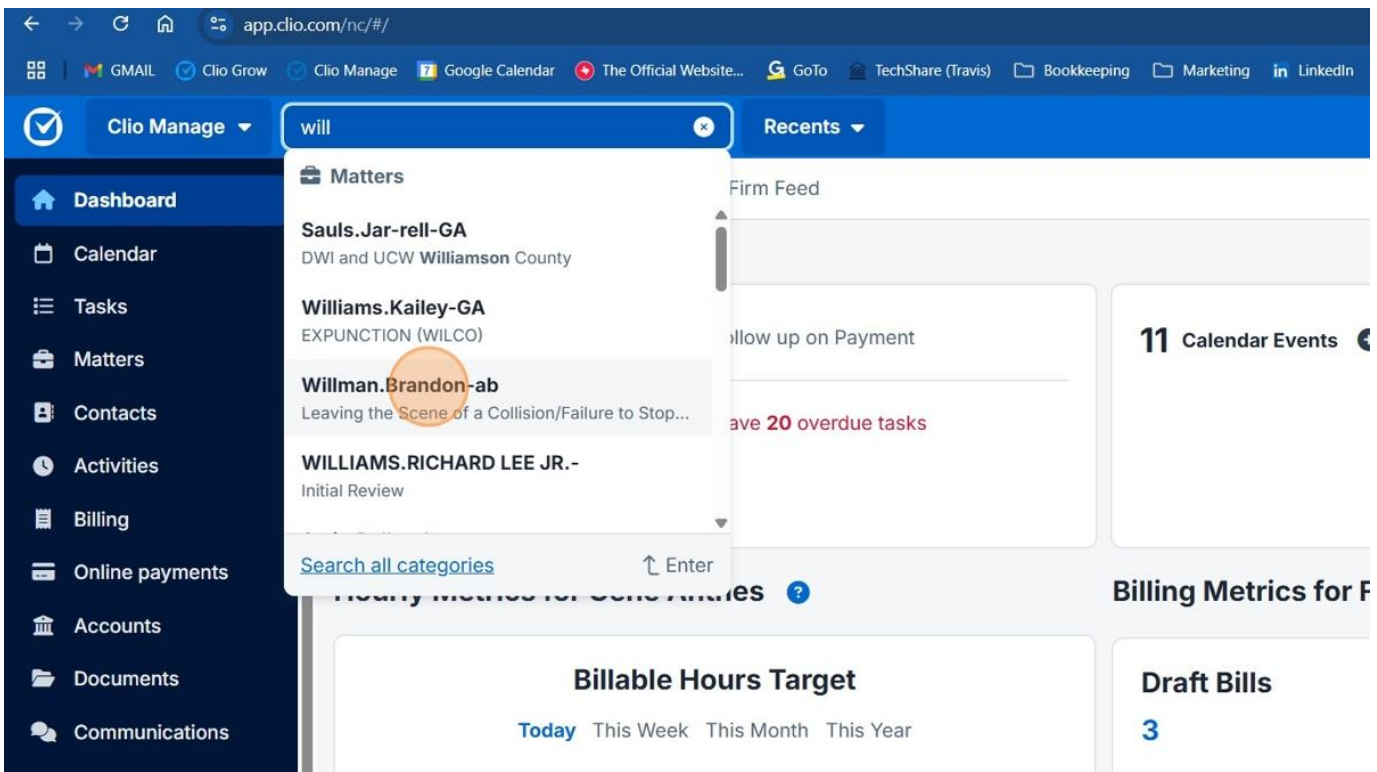
1. Navigate to Clio Manage



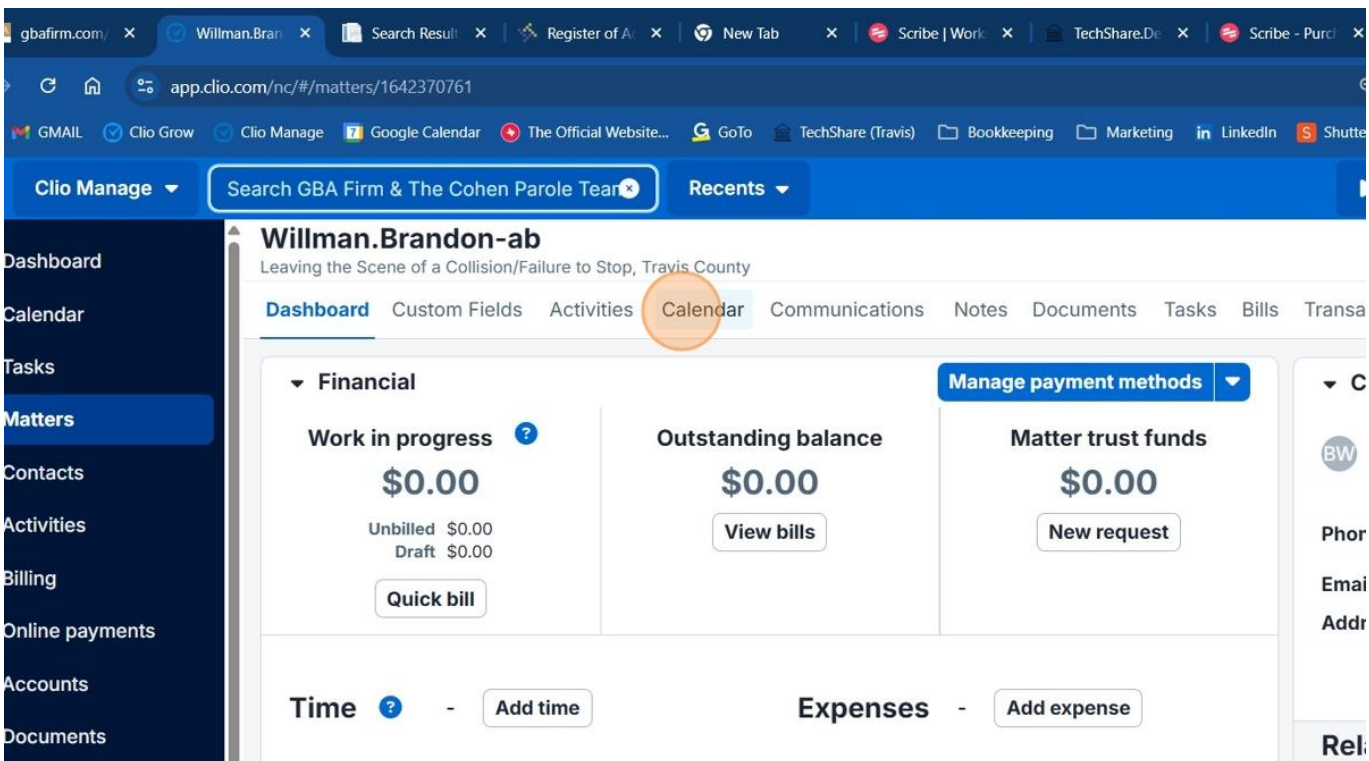
2. Search for the Client's Case



3. Click the correct case and client (note one client may have more than one case--make sure the correct case is picked)



4. Select Calendar



5. Click "New Event"

The screenshot shows a web browser window with multiple tabs. The active tab is a calendar interface. At the top, there are navigation buttons: 'Duplicate', 'Share', and 'Edit matter'. Below these are tabs for 'Fields', 'Activities', 'Calendar', 'Communications', 'Notes', 'Documents', 'Tasks', 'Bills', 'Transactions', and 'Clio for Co-Counsel'. The main area displays a calendar grid with two events. The first event is titled 'FST' and is scheduled for 9:30 AM. The second event is titled '147 Brandon Willman UDS' and is scheduled for 7:00 AM. A 'New event' button is circled in orange in the top right corner of the calendar view.

6. List the Court Number First (if outside of Travis, but that county in parenthesis next to the court number). Then list the type of setting (e.g. Pretrial Conference, Unindicted, etc)

The screenshot shows the 'New event' form. The 'Event details' section includes a 'Title' field with the text '147th - Unindicted'. Below the title are 'Start time' and 'End time' fields, both with a calendar icon. The 'Start time' field is circled in orange. There are also checkboxes for 'All Day' and 'Repeat'. The 'Location' field is empty. The 'Video Conferencing' section has a checkbox for 'Make this a Zoom meeting'. The 'Matter' field is set to 'Willman.Brandon-ab'. The 'Invite attendees' section has a search bar with the text 'Find firm users or contact' and 'Type in name'. Below this is a 'Suggested attendees' section with a user card for 'Brandon Willman' with email 'bwillman24@gmail.com'.

7. Select the setting date for the court setting.

Title * 147th - Unindicted

Find firm users or contact Type in name

Start time * 07/2025 10:30 AM

End time * 03/07/... 11:00 AM

Suggested attendees
Brandon Willman
bwillman24@gmail.com

March 2025

Su	Mo	Tu	We	Th	Fr	Sa
23	24	25	26	27	28	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today

Save event Save and create another Cancel

8. Pick the time (90% of the time, it's always a 9:00 a.m. setting).



new event

Event details

Title * 147th - Unindicted

Find firm users or contacts to Type in name

Start time * '31/2025 10:30 AM

End time * 03/31/... 11:00 AM

All Day Repeat

Location

Video Conferencing
 Make this a Zoom meeting

Matter Willman.Brandon-ab

Invite attendees

Suggested attendees
Brandon Willman
bwillman24@gmail.com

9. Chose the correct time from the drop down menu. You can also type the time in. Please make sure you pick the correct time otherwise the docket for that day will print incorrectly.

New event

Event details

Title *
147th - Unindicted

Start time *
03/31/... 10:30 AM

End time *
03/31/... 11:00 AM

All Day Repeat

Location

Video Conferencing
 Make this a Zoom meeting

Matter
Willman.Brandon-ab

Reminders

Invite attendees

Find firm users or contacts to invite
Type in name

Suggested attendees
Brandon Willman
bwillman24@gmail.com

10. Pick the end time (95% of the time it's just one hour later).



Event details

Title *
147th - Unindicted

Start time *
03/31/... 9:00 AM

End time *
03/31/... 9:30 AM

All Day Repeat

Location

Video Conferencing
 Make this a Zoom meeting

Matter
Willman.Brandon-ab

Invite attendees

Find firm users or contacts to invite
Type in name

Suggested attendees
Brandon Willman
bwillman24@gmail.com

11. Type the location (court number and county)

Event details

Title *
147th - Unindicted

Start time * 03/31/... 9:00 AM
End time * 03/31/... 10:00 AM

All Day Repeat

Location

Video Conferencing
 Make this a Zoom meeting

Matter
Willman.Brandon-ab

Reminders

Invite attendees
Find firm users or contact
Type in name

Suggested attendees
Brandon Willman
bwillman24@gmail.com

Save event **Save and create another** **Cancel**

12. Make sure to save the calendar entry to the correct attorney.

+ Add new reminder

Contacts who are notified by text will receive a text reminder 1 day(s) before this event. [Change setting](#)

Save to this calendar *
Gene Anthes
Gene Anthes
Firm
Alan Bennett
Sheliah Cromeans

Description

Save event **Save and create another** **Cancel**

**13. For court settings always click "add this event to the Firm calendar."
If not, it will not print on the docket.**

Reminders

[+ Add new reminder](#)

i Contacts who are notified by text will receive a text reminder **1 day(s)** before this event. [Change setting](#)

Save to this calendar *

Alan Bennett

Add this event to the Firm calendar as well as the selected calendar

Event type ?

Select an event type

Description

[Save event](#) [Save and create another](#) [Cancel](#)

14. Always select event type.

[+ Add new reminder](#)

i Contacts who are notified by text will receive a text reminder **1 day(s)** before this event. [Change setting](#)

Save to this calendar *

Alan Bennett

Add this event to the Firm calendar as well as the selected calendar

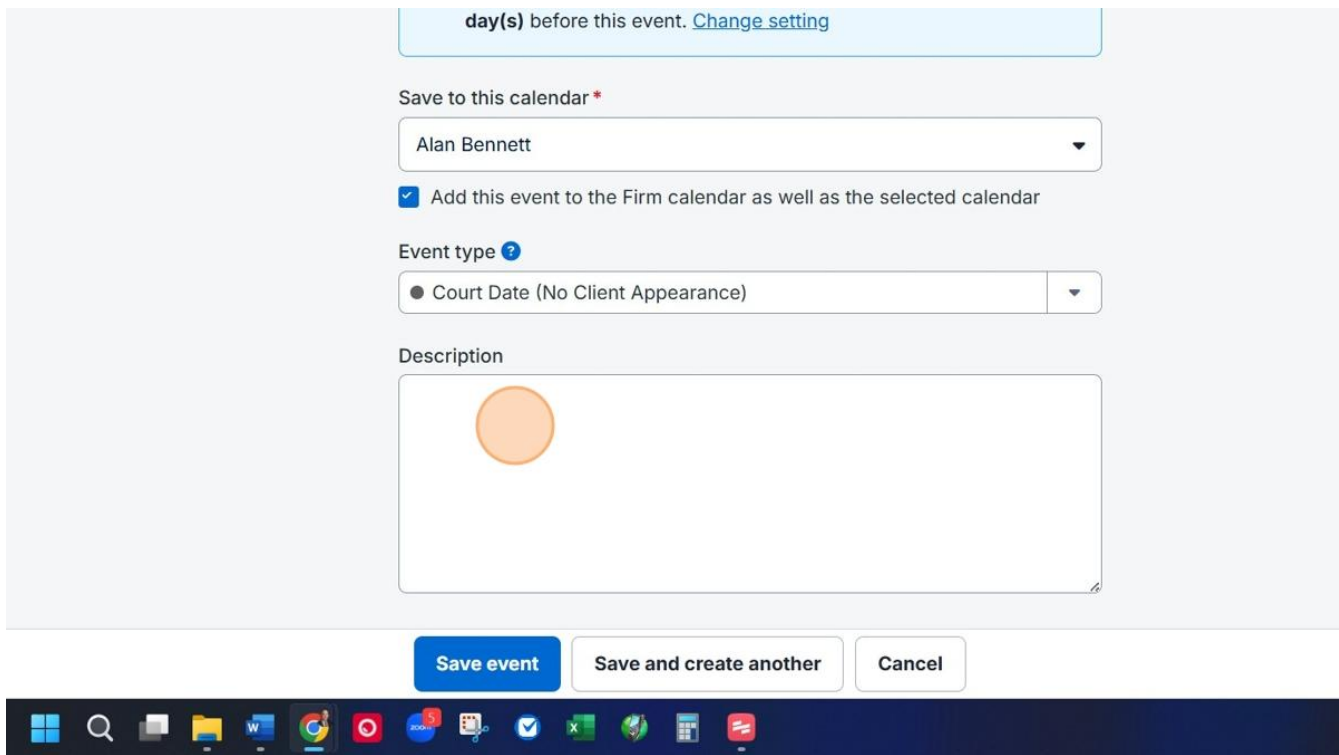
Event type ?

Select an event type

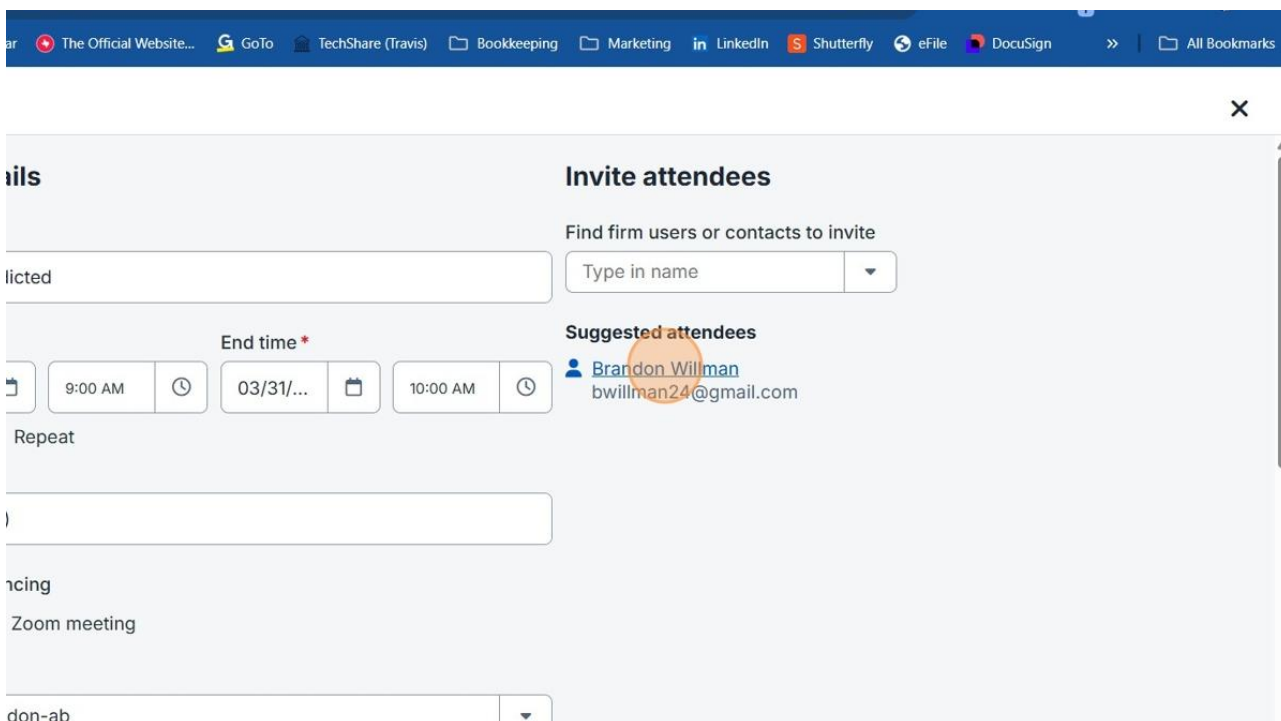
- Court Date (Client Appearance Required)
- Court Date (No Client Appearance)
- Deadline
- Meeting
- Parale Hearing/Presentation

Windows taskbar icons: Start, Search, File Explorer, Word, Chrome, Edge, Outlook, Teams, OneDrive, PowerPoint, Excel, Access, OneNote, Mail, Calendar, Photos, Music, Store, Settings, Task View, Power, Windows Defender, Windows Security, Windows Update, Windows Defender Security Center, Windows Defender Firewall, Windows Defender SmartScreen, Windows Defender Antivirus, Windows Defender App Guard, Windows Defender Credential Guard, Windows Defender Device Guard, Windows Defender Network Protection, Windows Defender SmartScreen, Windows Defender Security Center, Windows Defender Firewall, Windows Defender SmartScreen, Windows Defender Antivirus, Windows Defender App Guard, Windows Defender Credential Guard, Windows Defender Device Guard, Windows Defender Network Protection.

15. In the description box it helps to add a note about the setting. You can also use this to send notice of the setting to the client. 4



16. If you have added a note in the description box and want the client to get notice of the setting, make sure you click on the client's name as a suggested attendee.



17. When you click "save event" it will add the event to the attorney's calendar and if you've selected the client's name a message will be sent to the client with an update.

day(s) before this event. [Change setting](#)

Save to this calendar *

Alan Bennett

Add this event to the Firm calendar as well as the selected calendar

Event type ?

Court Date (No Client Appearance)

Description

Brandon,
Your case has been set for the date listed above. You do not need to be present on that day. I will report back to you shortly thereafter. Please let me know if you have any questions.
Alan Bennett
Alan@GBAFirm.com
512-476-2494

Save event Save and create another Cancel

18. If there have been previous calendar entries you can also use a prior entry and update the date to the new setting. Select the previous entry to edit that date. Make sure everything is updated before saving event.

Actions	Start	End	Title and description	Calendar	Event type
Edit	01/07/2025 9:00 AM	9:30 AM	DL Hearing	• Gene Anthes	-
Edit	03/11/2025 9:00 AM	9:30 AM	JP2 - DL Hearing	• Gene Anthes	• Court Date (Client Appearance Required)

1-2 of 2 Export

19. Once you've updated the event, click save event and Clio will give you the option to "send update" or "don't send update." If you've selected the client's email an attendee, sending an update will send the client another email with the new date. Editing a calendar update this way allows you to do so without having to retype everything.

