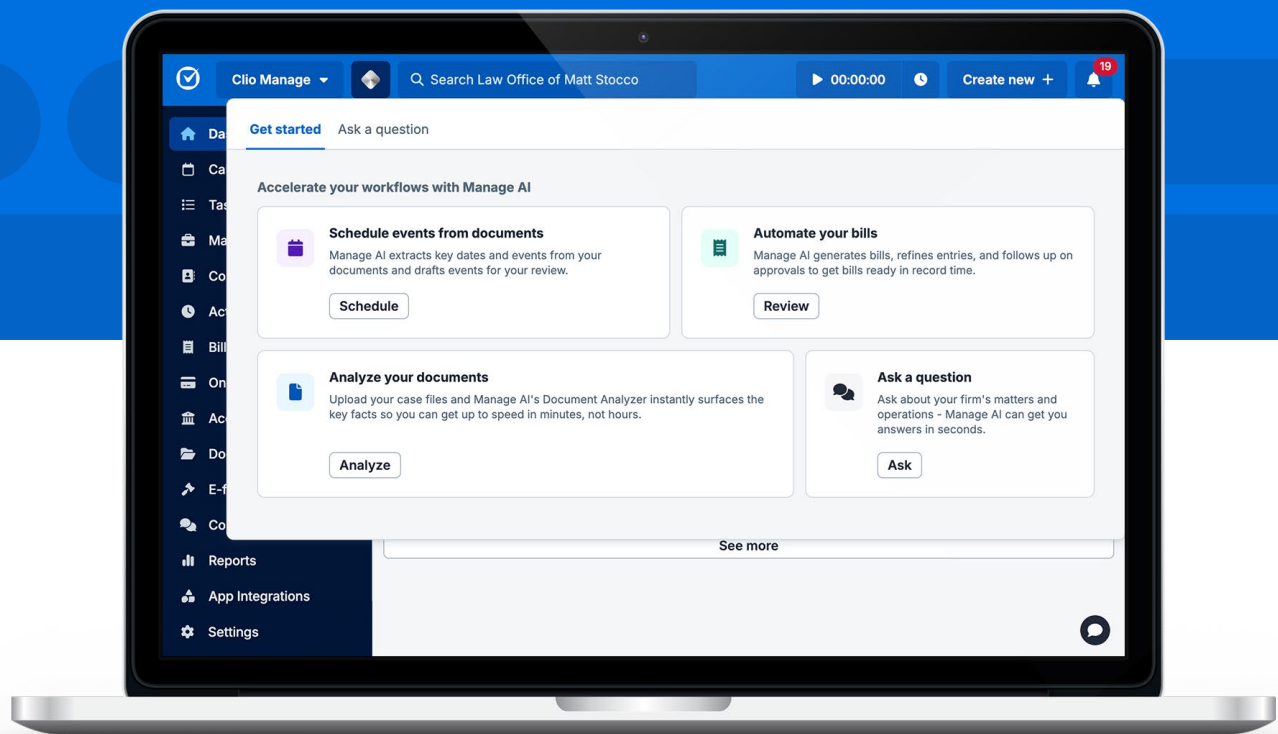


Manage AI Getting Started Guide



Manage AI removes the manual work in your day by transforming court documents into calendar events, matter activity into client updates, and time and expense entries into draft invoices.

The result is fewer missed deadlines and hours returned each week to focus on the important work that only you can do.

Manage AI is available as an add-on to Essentials, Advanced, or Expand plans.



Manage AI has turned hours of manual work into minutes of review. It's so powerful and intuitive that it has become not just a time saver, but a sanity saver.

Amy Pankratz, Birkholz Law

Getting Started

How to use AI to schedule important court dates from documents

Step 1

Manage AI can automatically find key court dates from documents. To get started, click the **gem icon** in the top toolbar. You can also get started by:

- Uploading documents to a matter
- Creating a new event from the Calendar tab and selecting **extract from document**
- From the **documents** tab, click **AI actions**, then **extract events**.



Step 2

On the upload screen, enter your matter and document information and click **extract events**.

Step 3

Manage AI identifies all relevant dates and shows where each one appears in the document. From here, you can:

- Use the pencil icon to edit events before scheduling
- Select the calendar icon to add other users to the invitations
- Use the clock icon to manage event reminders for every user.

Step 4

Click create events and watch them appear on your calendar.

Pro Tip



Mechelle Woznicki, Founder and Attorney of Woznicki Law, doesn't worry when dates change.

When negotiating with opposing counsel or the court, she simply handwrites agreed-upon changes. After uploading the document, Manage AI recognizes the handwritten dates and schedules them automatically.



Getting Started

How to send proactive client updates

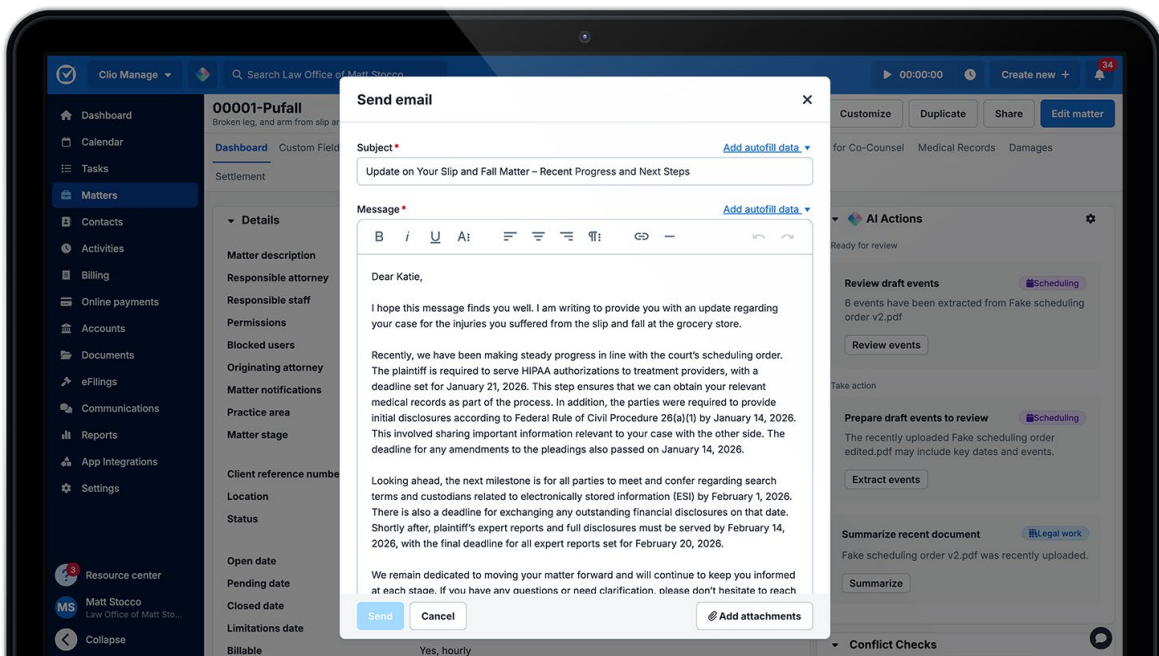
Step 1

Manage AI proactively knows when you should send a client update, and writes it for you.

To know if a new update has been written for you, navigate to your matter. Under the AI Actions card, you'll see when a new communication is ready for review.

Step 2

Review the message and click **send**.



Pro Tip

Keep an eye on the AI Actions card in a matter. Notifications about new client communications will also appear there.



Getting Started

How to automate every billing cycle

Step 1

To automate your bill generation, go to the **billing** tab and select **automated billing**. Here you can:

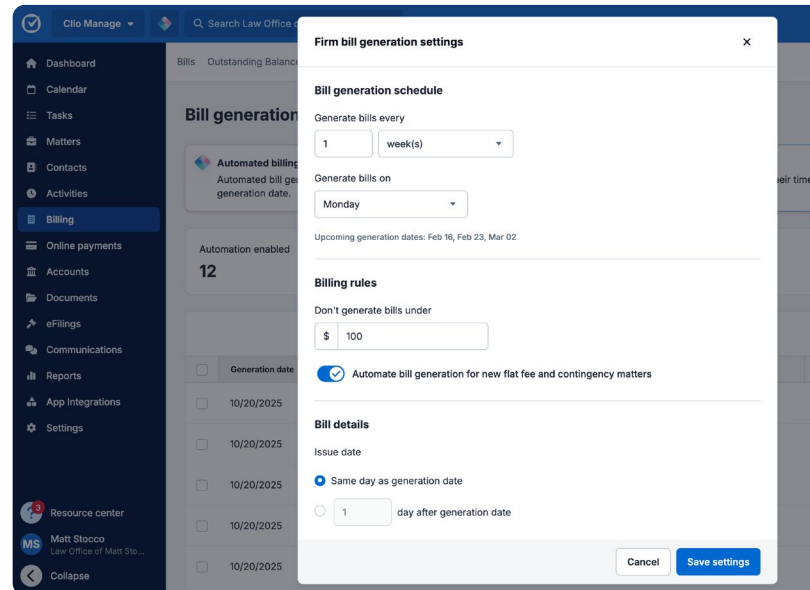
- Set billing frequency: weekly, biweekly, or monthly
- Specify a minimum bill amount
- Choose bill types: hourly, flat-fee, or contingency
- Assign bill approvers
- Set issue and payment due dates
- Apply a bill theme

Step 2

You'll be notified when new draft bills have been generated. Head into the **bills** tab to review.

Step 3

Review your bills, then submit for final approval or send them to clients.



Pro Tip

Matters with auto-generation turned on appear under the **automated billing** tab. Use the toggle to turn it off for any matter.



Want more tips? Here are some helpful resources:

Manage AI Welcome Kit

Get the latest resources and updates about what is new in Manage AI.

Join the community

Connect with other legal professionals using Clio through our forum.

Power up with Clio

Join us in a monthly webinar diving into best practices.

See what's new

Join our quarterly webinar featuring our latest product updates.

Have questions?

Visit the [Help Center](#) or contact customer support at 1-888-858-2546.

