

Getting Started with Clio Duo



Whether you're looking for information on cases, clients, documents, or tasks, here are examples of questions you can ask Clio Duo. Feel free to modify them based on your specific needs and explore other questions to see how Clio Duo can best serve your practice.

In the sample questions below, we will refer to an example matter, user, and client as 'John Doe'.

SAMPLE QUESTIONS TO ASK CLIO DUO

Access matter information

- Get me up to speed on the John Doe matter
- List open matters with user John Doe as the responsible attorney
- List matters opened last week
- How many open matters do we have?

Retrieve client information

- Show me recent email communications for John Doe
- Retrieve contact details for John Doe
- What's John Doe's number?
- Tell me about the last email communications for John Doe
- Do we have any upcoming deadlines this week for the John Doe matter?

Find documents fast

- Which files have been recently uploaded for John Doe's matter?
- Show me documents uploaded this past week

Expedite matters

- Bring me up to speed on John Doe's matter
- What was the latest note about the John Doe matter?
- Show me summary of notes from the John Doe's matter
- Provide a summary of court appearances for the coming week

Manage your to-do list

- What tasks do I have for today?
- Retrieve tasks associated with court hearings or depositions
- What deadlines are coming up for John Doe's case?
- List all tasks related to document review

Stay up to date on billing information

- Show me all of my billable activities the past week
- List all unpaid bills for the past month
- Show me any recent bills with outstanding balances
- Which clients have an outstanding balance with our firm?
- What is the status of the latest invoice sent to John Doe?

Get firm insights

- What are my billable hours for last month?
- Show me billed hours last month for John Doe
- Provide a productivity report for attorney John Doe for the last month
- Retrieve a breakdown of revenue for civil litigation (example practice area)

Ready to learn more?

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