Clio QUICKSTART SESSIONS

Start Using Clio Manage Today

Congratulations on finishing your first quick start session!

This session covered how to set up Clio Manage and important areas for your business, including creating custom fields, adding and managing contacts and matters, and recording billable time for your work. Here's a summary of the key highlights:

USE CUSTOM FIELDS TO CAPTURE ADDITIONAL DATA

Custom fields and field sets in Clio are helpful for capturing additional information that you can add to contacts and matters. You can also use custom fields in document templates. Join our next session, "Fast Track to a Paperless Practice with Clio Manage," to learn more.

MANAGE CLIENTS AND CASES

Manage your clients and matters by searching and filtering contacts and matters, designating how time is billed on a matter, modifying the matter numbering scheme to organize your matter listing, and changing permissions on matters to only grant access to certain people or groups.

EASILY RECORD BILLABLE TIME

Clio makes it easy to record billable time by offering a flexible rate system and the option to add time in multiple areas depending on what works best for your workflow. You can also add billable time with the Timer, which continues to run until you click pause—all while you navigate throughout Clio!

ACCESS CLIO'S KNOWLEDGE BASE WHENEVER YOU NEED IT

Have questions or need help getting started?
Visit our Help Center for in-depth articles and how-to videos.

Note: Custom fields are not available in the EasyStart plan in North America.