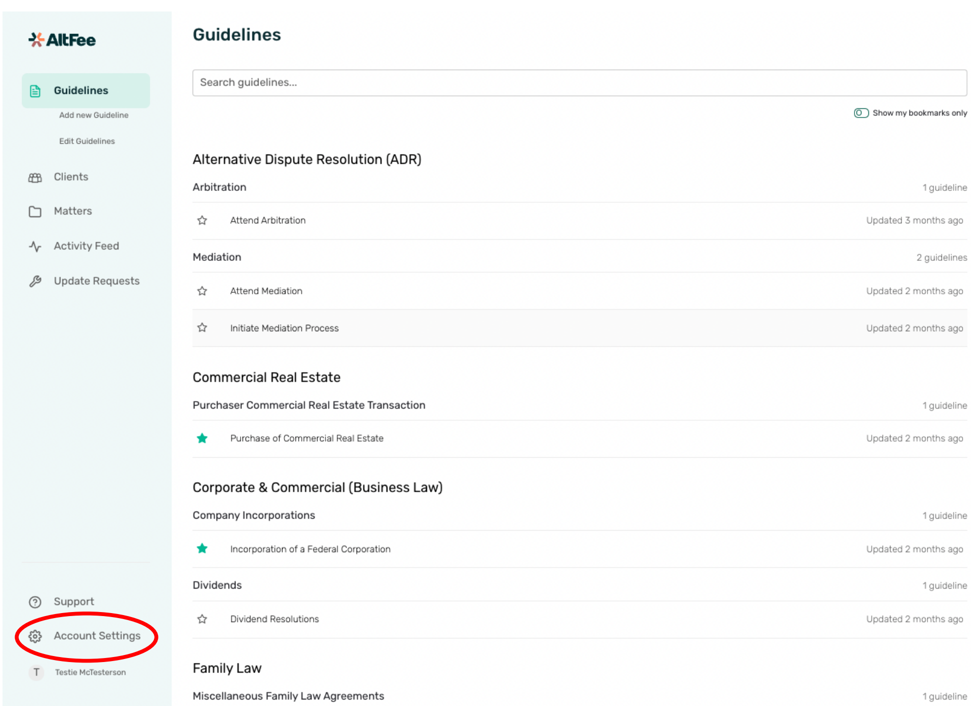
How to Integrate your AltFee and Clio Accounts.

Automatically have all of your contacts in Clio sync with your AltFee account, ensuring contact consistency when you are scoping and pricing matters in AltFee or managing your practice in Clio Manage. Contact detail changes in Clio will automatically update in AltFee, saving you time and giving you peace of mind!

Steps

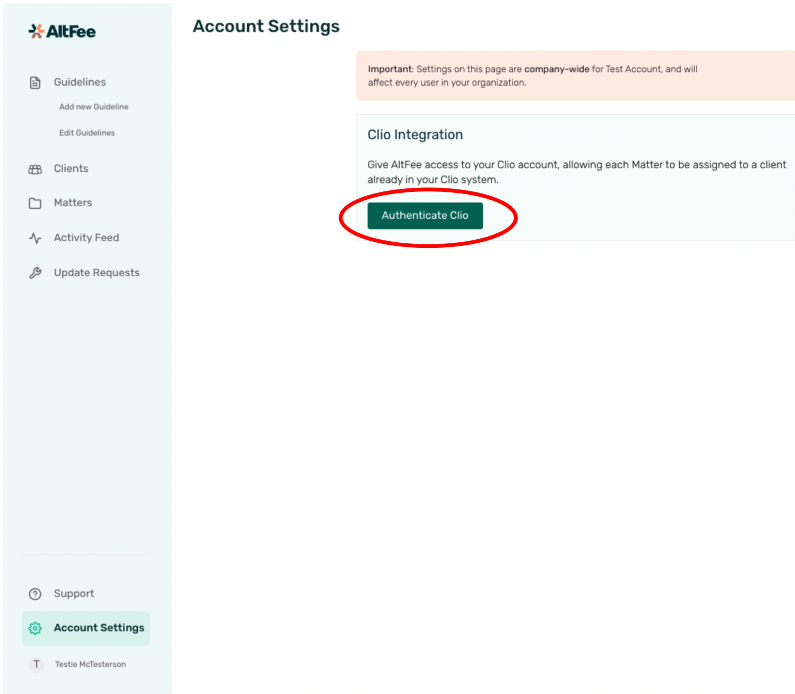
01

While logged into your AltFee app, click "**Account Settings**" in the left navigation section.



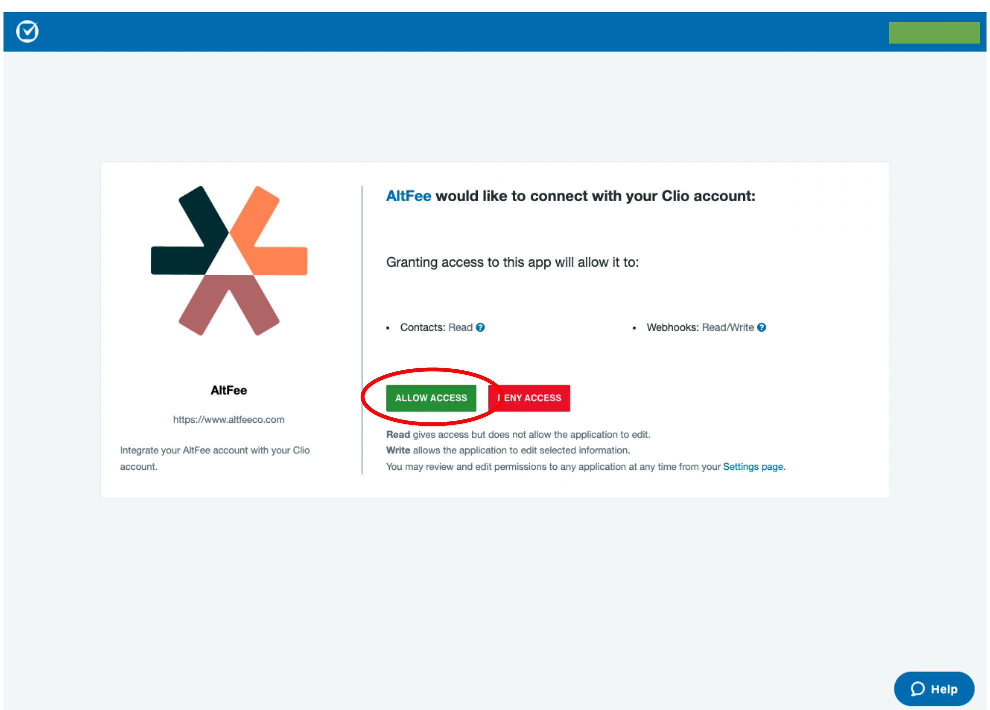
02

Click the **"Authenticate Clio"** button.



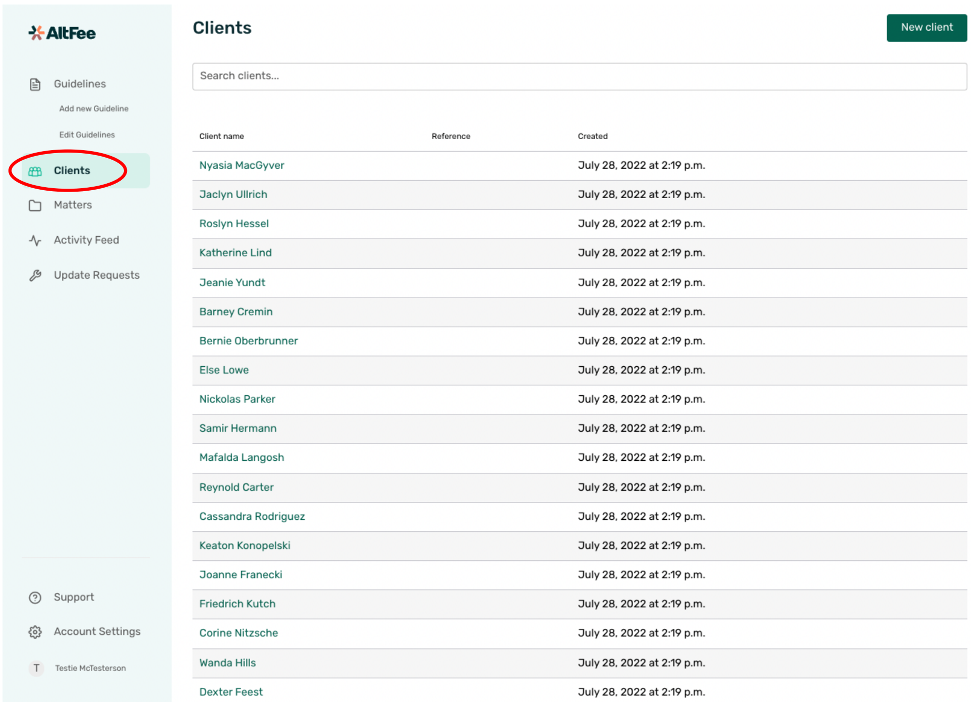
03

Log into your Clio account, and then Click **"Allow Access"** in order for AltFee to connect with your Clio Account.



04

Upon allowing access, AltFee's app will automatically import all of your existing Clio contacts into AltFee, so the next time you scope and price out a matter for a client you will be able to select that client from your contact list. See the **"Clients"** section in the left navigation.



05

You will also be able to review all matters that have been scoped and priced for any particular client, by clicking on a specific client's name under the **"Clients"** section.