



# 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

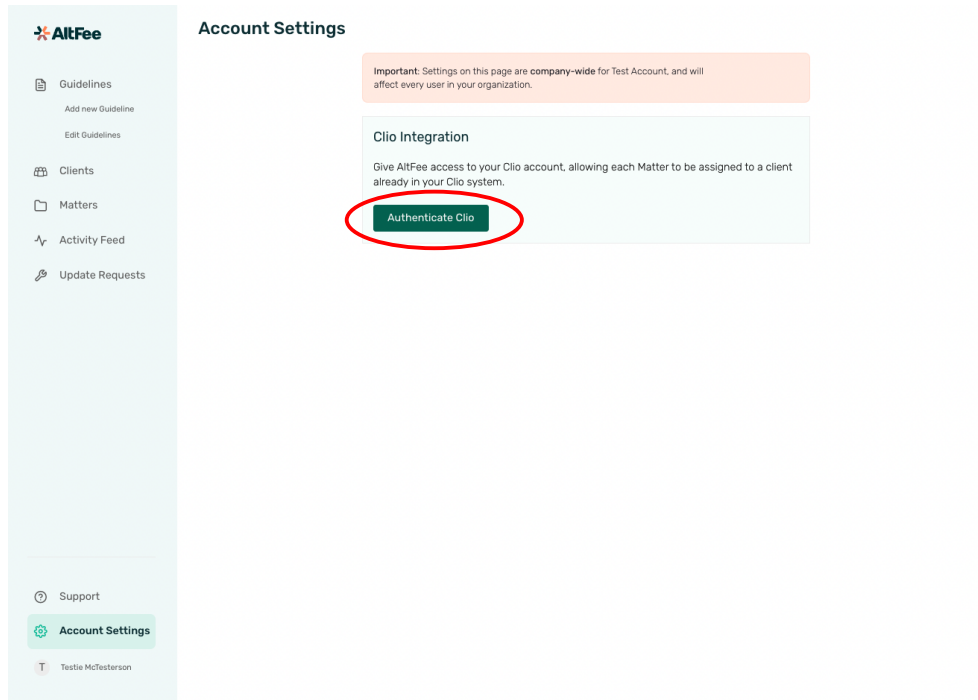
### 01

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

The screenshot displays the AltFee app's user interface. On the left is a light blue navigation sidebar with the AltFee logo at the top. Below the logo are several menu items: 'Guidelines' (with sub-options 'Add new Guideline' and 'Edit Guidelines'), 'Clients', 'Matters', 'Activity Feed', and 'Update Requests'. At the bottom of the sidebar are 'Support' and 'Account Settings', which is circled in red. The main content area on the right is titled 'Guidelines' and features a search bar. It lists various legal categories and their associated guidelines, including 'Alternative Dispute Resolution (ADR)' with sub-items 'Arbitration' and 'Mediation', 'Commercial Real Estate' with 'Purchaser Commercial Real Estate Transaction', 'Corporate &amp; Commercial (Business Law)' with 'Company Incorporations' and 'Dividends', and 'Family Law' with 'Miscellaneous Family Law Agreements'. Each item shows the number of guidelines and the last update time.

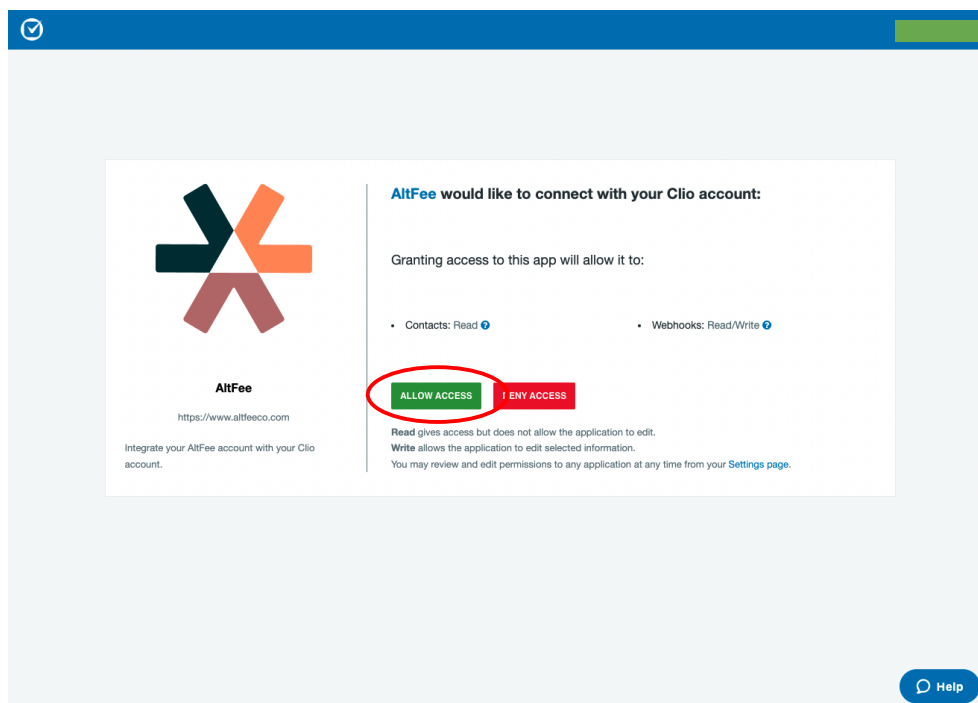
## 02

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



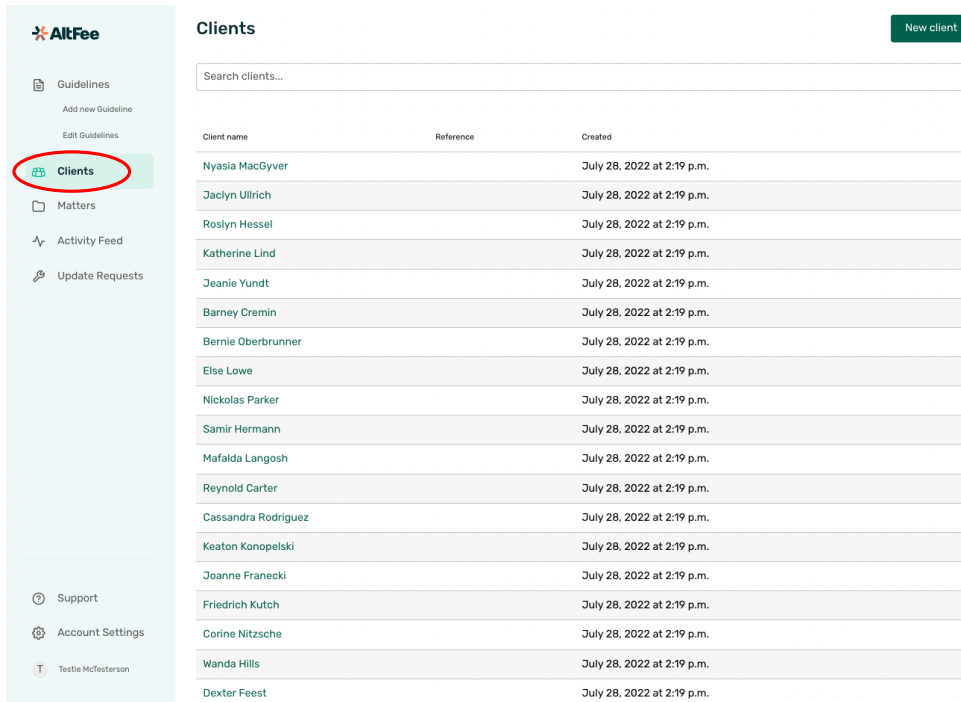
## 03

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.

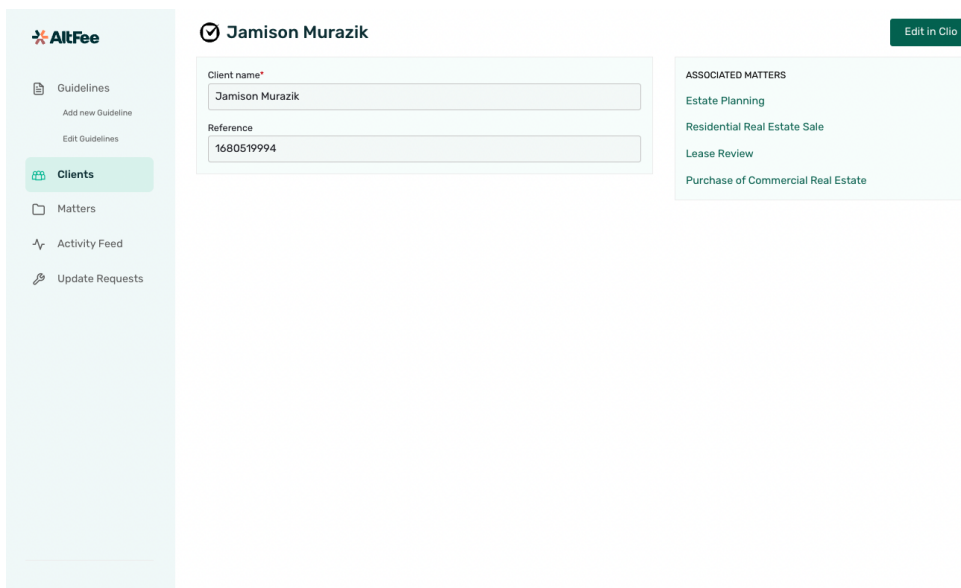


The screenshot shows the AltFee application interface. On the left is a sidebar with navigation options: Guidelines, Clients (highlighted with a red circle), Matters, Activity Feed, and Update Requests. Below these are Support, Account Settings, and a user profile for Testie McTesterson. The main area is titled 'Clients' and features a 'New client' button and a search bar. Below the search bar is a table listing imported clients.

Client name	Reference	Created
Nyasia MacGyver		July 28, 2022 at 2:19 p.m.
Jaclyn Ullrich		July 28, 2022 at 2:19 p.m.
Roslyn Hessel		July 28, 2022 at 2:19 p.m.
Katherine Lind		July 28, 2022 at 2:19 p.m.
Jeanie Yundt		July 28, 2022 at 2:19 p.m.
Barney Cremin		July 28, 2022 at 2:19 p.m.
Bernie Oberbrunner		July 28, 2022 at 2:19 p.m.
Eise Lowe		July 28, 2022 at 2:19 p.m.
Nickolas Parker		July 28, 2022 at 2:19 p.m.
Samir Hermann		July 28, 2022 at 2:19 p.m.
Mafalda Langosh		July 28, 2022 at 2:19 p.m.
Reynold Carter		July 28, 2022 at 2:19 p.m.
Cassandra Rodriguez		July 28, 2022 at 2:19 p.m.
Keaton Konopelski		July 28, 2022 at 2:19 p.m.
Joanne Franecki		July 28, 2022 at 2:19 p.m.
Friedrich Kutch		July 28, 2022 at 2:19 p.m.
Corine Nitzsche		July 28, 2022 at 2:19 p.m.
Wanda Hills		July 28, 2022 at 2:19 p.m.
Dexter Feest		July 28, 2022 at 2:19 p.m.

## 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.



The screenshot shows the AltFee application interface with the 'Clients' section selected in the sidebar. The main area displays the details for a client named 'Jamison Murazik'. There is a 'Client name\*' field with the value 'Jamison Murazik' and a 'Reference' field with the value '1680519994'. To the right, under the heading 'ASSOCIATED MATTERS', there is a list of matters: Estate Planning, Residential Real Estate Sale, Lease Review, and Purchase of Commercial Real Estate. An 'Edit in Clio' button is visible in the top right corner.