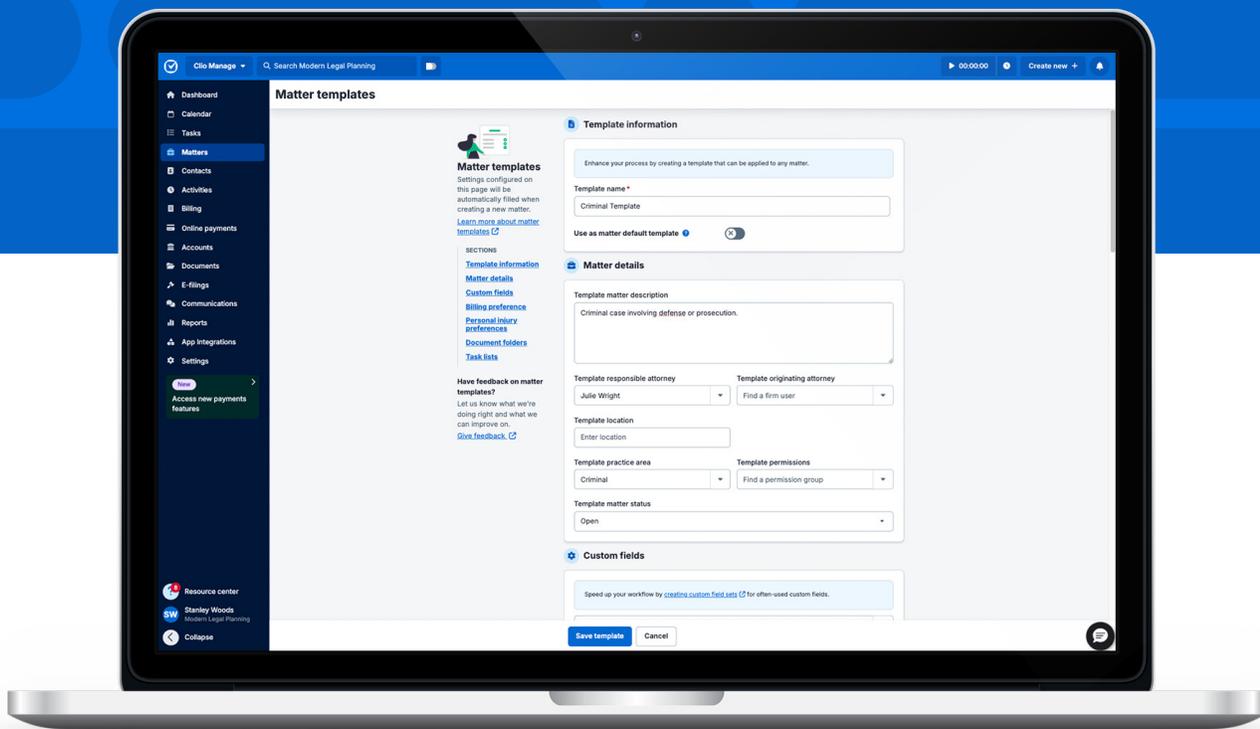# Matter Templates Best Practices Guide

Matter templates help you create new matters faster by allowing you to tailor templates by practice area or case type. These templates include preset details—such as matter information, document folders, task lists, and billing settings—that are automatically applied when a new matter is created, making setup easier and more consistent.

Matter templates in Clio Manage are included on the Essentials, Advanced, and Complete plans.

Here's how matter templates help your firm stay organized and efficient:

- **Standardize your setup process.** Every matter starts with the right details, task lists, and document folders—no matter who creates it.

- **Save time on repetitive data entry.** Enter key information once and apply it to every new matter, reducing manual effort.

- **Reduce setup errors.** Pre-populated fields help capture important information accurately across all matters.
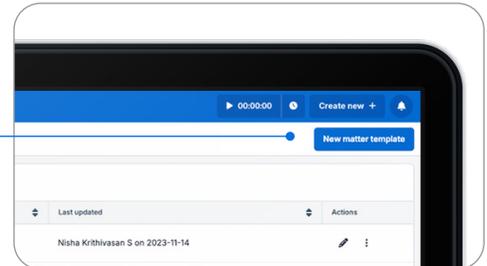
Get Started

Step 1

From the matters tab, select <u>matter templates</u> at the top right corner. From here, you can create a new template.

Step 2

Name your template and then complete the sections with the information you would like to pre-populate when creating a matter such as matter details, billing preferences, document folders, and task lists.

To set your template as the default for all new matters, turn on the **use as matter default template** toggle, then save your template.

Pro Tip

If you use Clio Grow, you can also <u>apply a matter template</u> when converting a matter to Clio Manage. This helps you quickly and consistently populate information into the corresponding fields.

Best Practices

Before creating matter templates

Set up your [practice areas](#), [custom fields](#), [task lists](#), and [document folders](#) in Clio Manage to ensure you have all the necessary details to include in your templates ready.

When creating matter templates

Use clear, descriptive names such as "Family Law – Default" or "Real Estate Purchase" so your team can quickly identify and apply the appropriate template.

After creating matter templates

Review your templates regularly to make sure they stay aligned with your firm's current workflows, billing methods, and practice area needs.

See how this Real Estate attorney uses matter templates to prevent mistakes.

> The firm is fully automated. I wouldn't consider software that doesn't have automated templates—there is no way to know how much time would be lost if we had to enter data for every form.

Julie Anderson
Chief Executive Attorney & Managing Partner,
Anderson & Associates

Why Julie loves using matter templates

- **Saves time.** Matter templates save her team valuable time every time they open a case, allowing them to offer a highly competitive fee structure to their clients as the firm is fully automated.

- **Prevent errors.** Matter templates help reduce the errors that come with repetitive data entry. Human error can significantly disrupt operations and affect productivity and profitability. However, many of these mistakes are avoidable with the right processes, procedures, and systems in place.

- **Ensures consistency.** Matter templates ensure that all practice groups generate consistent, high-quality documents that have been reviewed and approved by the legal management team.

Want more tips? Here are some helpful resources:

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 Help Center or contact customer support at 1-888-858-2546