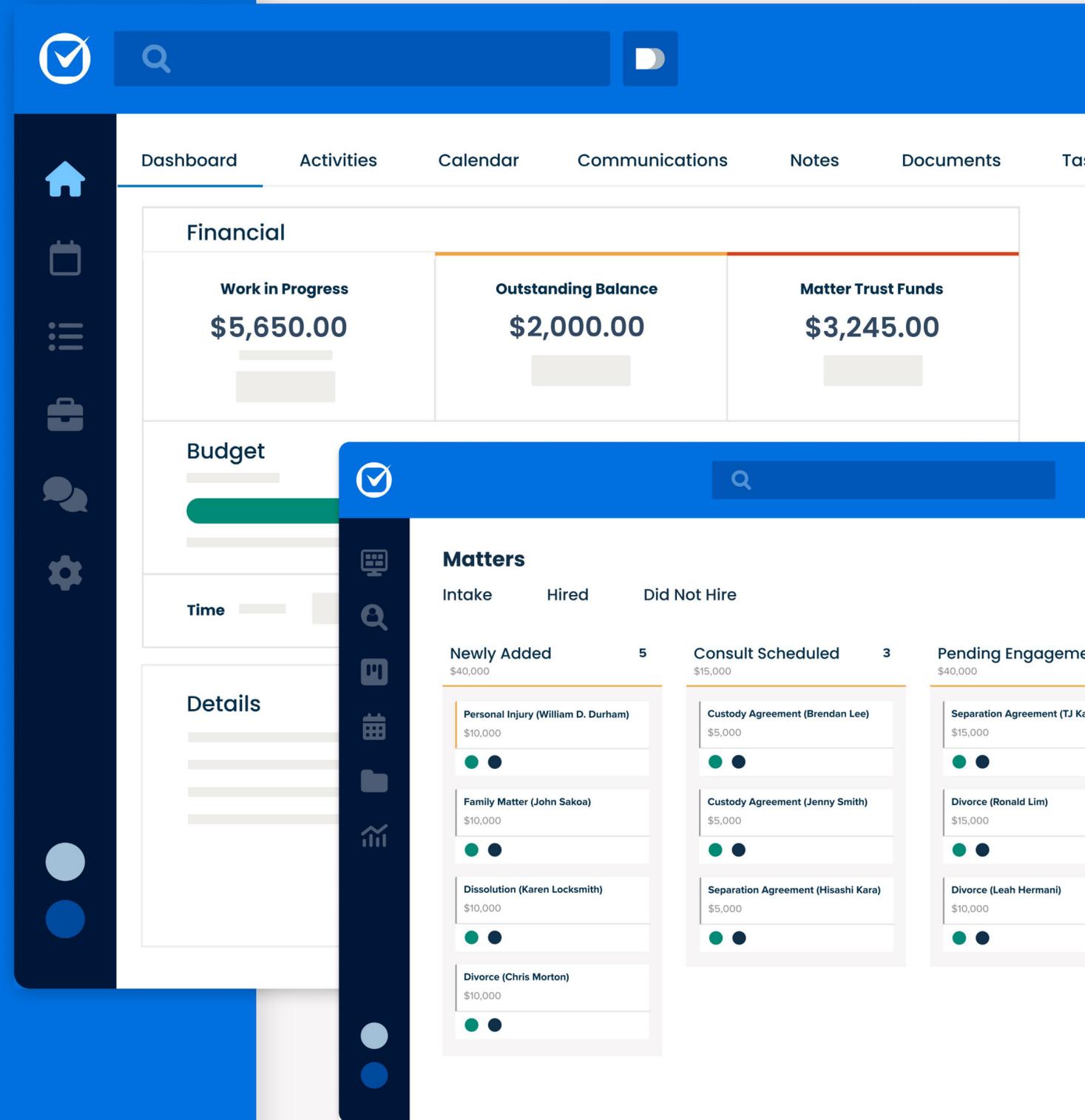




Get Started

# Clio Expand Matters





## Congratulations on finishing your training session!

This session covered how to set up Clio Grow and 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.

Your next steps are to practice these action items in your Clio account prior to your next session.

### In Clio Grow

Begin your [account set up](#) by completing your Profile

Use the [Quick Intake](#) to create a new Contact and [Matter using fictional data](#)

[Connect your Email](#) in Clio Grow

[Create Contact and Matter Types](#) in your Settings

### In Clio Manage

Download the [Clio Mobile App](#)

Set up your [Email Personalization](#)

Complete your [Clio Payments](#) set up

Create a Contact or Matter [Custom Field](#) to appear on your Contact or Matter intake page

Add a [Time Entry](#) by using the Timekeeper, or from the Create New button

[Upload a Document](#) into Clio



Take some time before your next training session to complete the tasks on the previous page, and use the links embedded to help you through each task if needed. As always, if you have any questions, please reach out to our Support team.

[support@clio.com](mailto:support@clio.com)

1-888-858-2546

