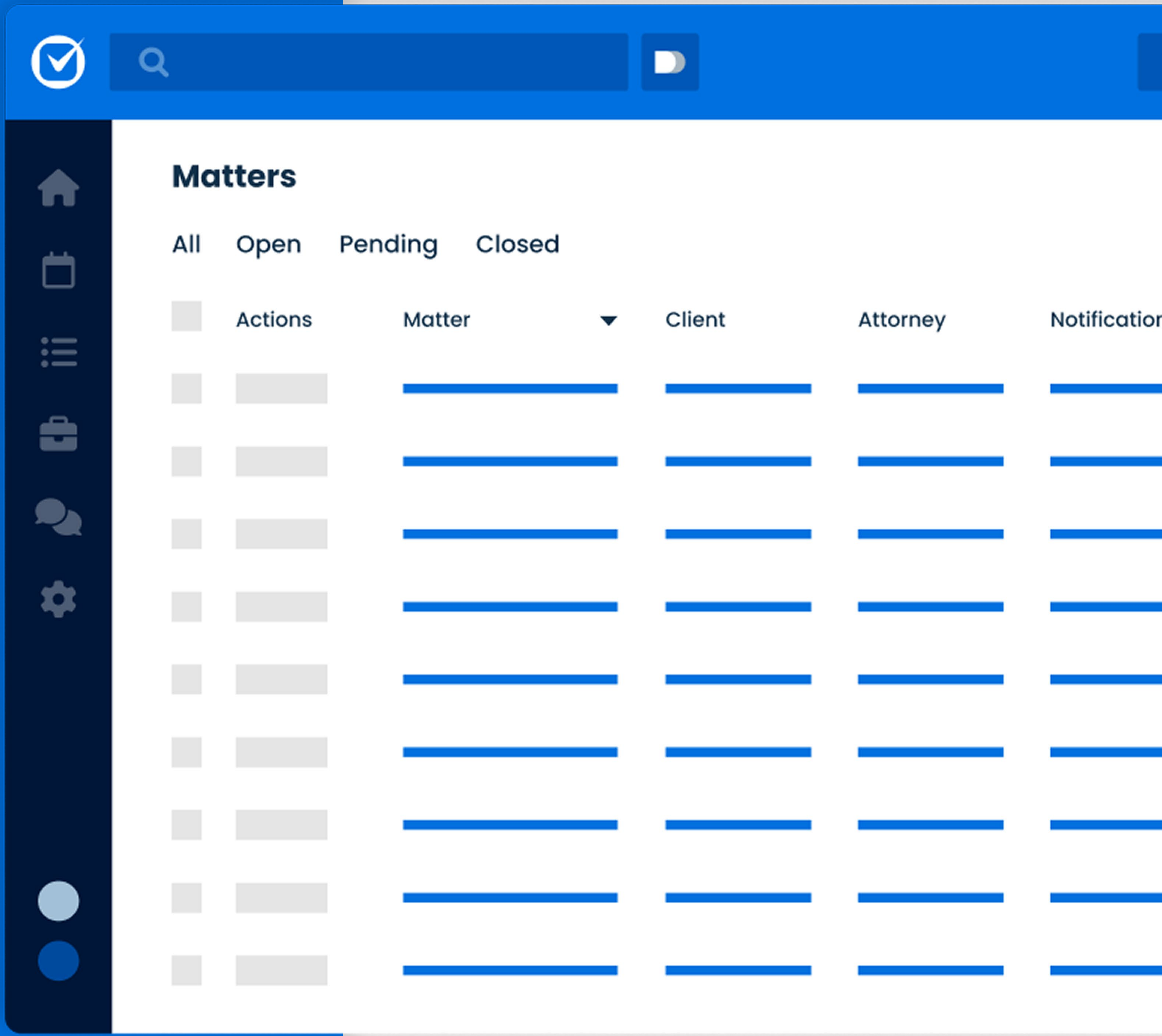
Clio

Get Started

Clio Matters



Congratulations on finishing your first training 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.

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

- [ ] Download the Clio Mobile App
- [ ] Complete your Clio Payments set up
- [ ] Set up your Email Personalization
- [ ] Create a Contact and a Matter using real or fictional data
- [ ] 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

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