Clio®

Overview Webinar

Clio's Overview Webinar is designed to give an inside look at the basic features of Clio to ensure a quick intake-to-invoice workflow can be followed.

This Document will cover the basics of what is discussed in the Overview Webinar.

www.clio.com

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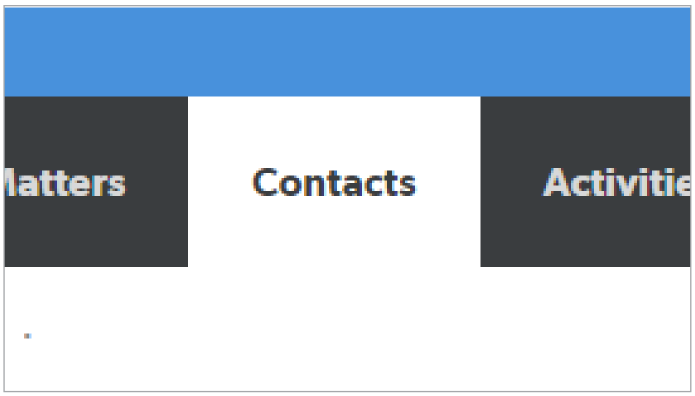
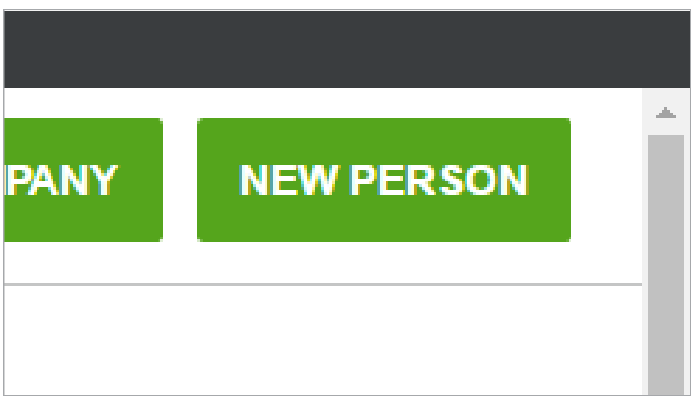
Contacts

Contacts track personal data for your clients such as address information, billing information, and communications.

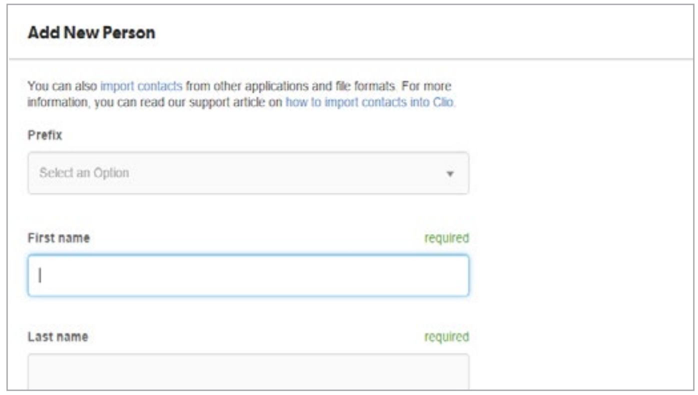
1. Click on the Contacts tab.



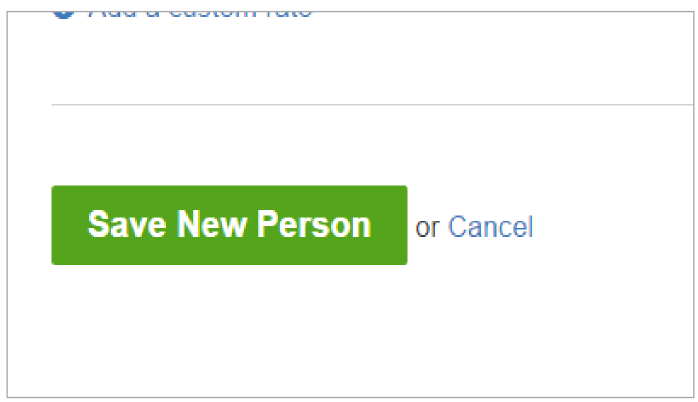
2. Click New Person on the right hand side.



3. Input the Contact details.



4. At the bottom of the page, click the Save button.

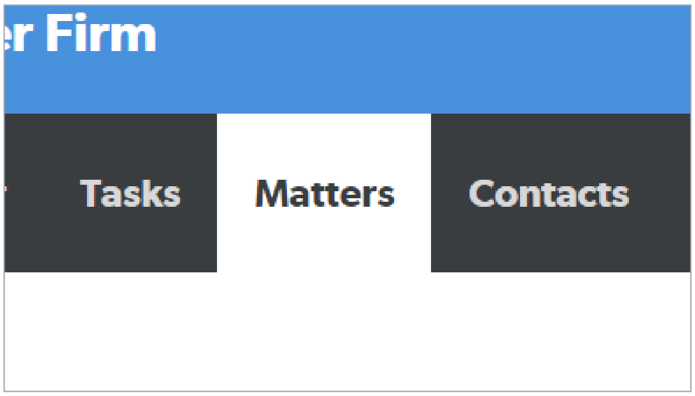


More details can be read in the [Clio Accounts Support Articles](#).

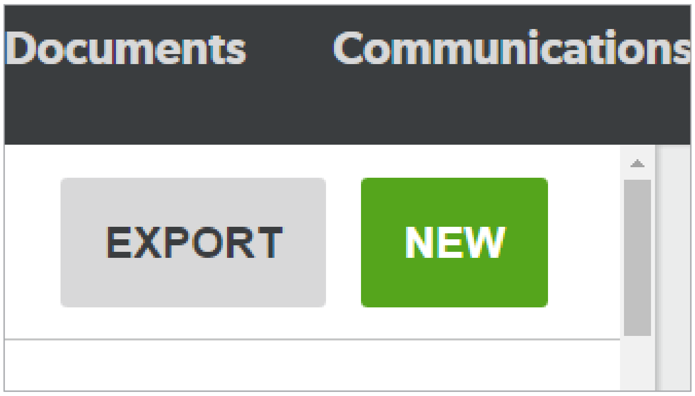
Matters

Matters hold your clients' billing information, communications, transactions and documents.

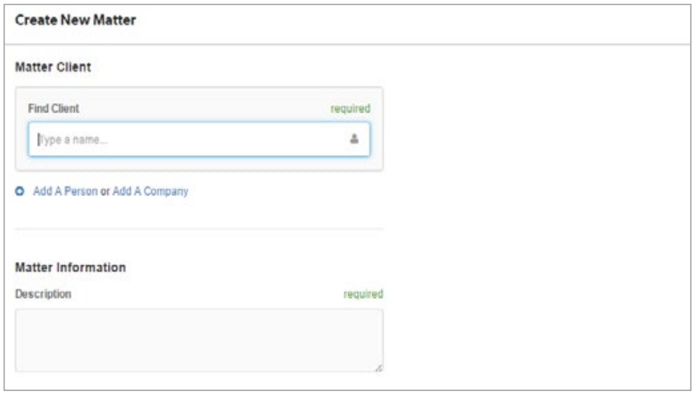
1. Click Matters at the top of the page.



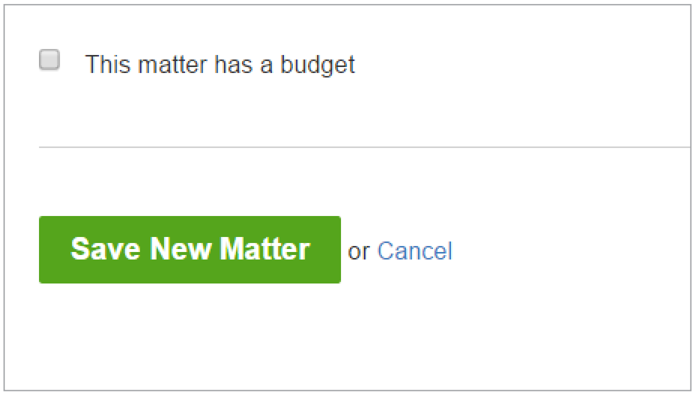
2. Click New at the upper right.



3. Input your Matter details.



4. Click Save New Matter at the bottom of the page.

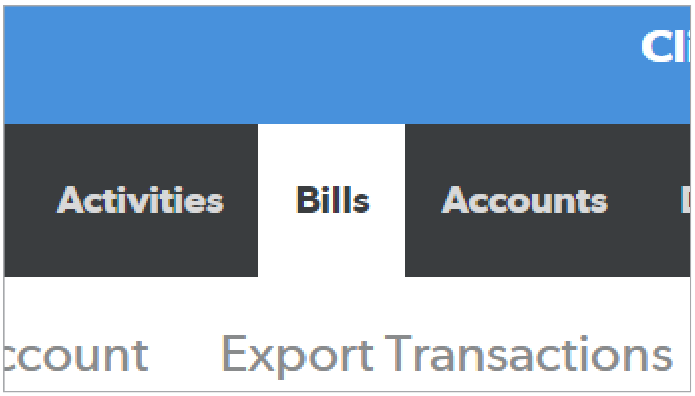


More details can be read in the Matters Support Articles.

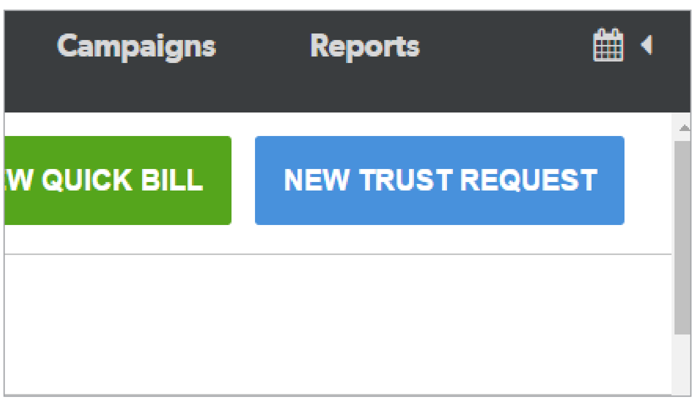
Retainers

Utilizing Trust Requests allows you to ask funds from your Clients and store the transactions under Matters or Contacts.

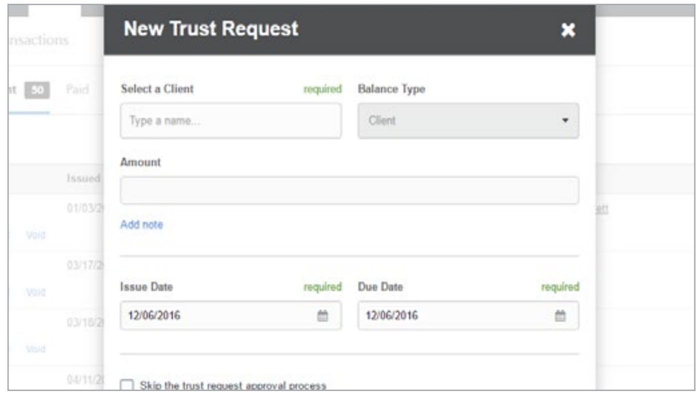
1. Select the Bills tab at the top of Clio.



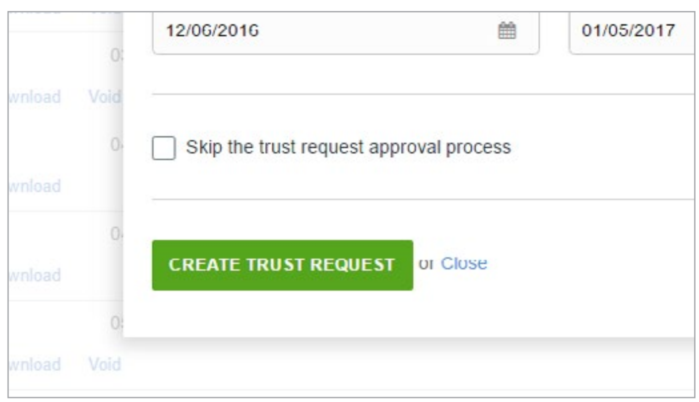
2. Select the Transactions tab within the Matter.



3. Input your Trust Request details.



4. Click Create Trust Request.

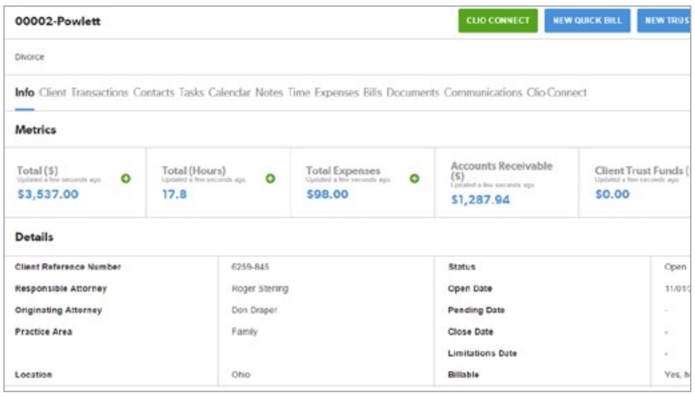


More details can be read in the [Trust Request Support Articles].

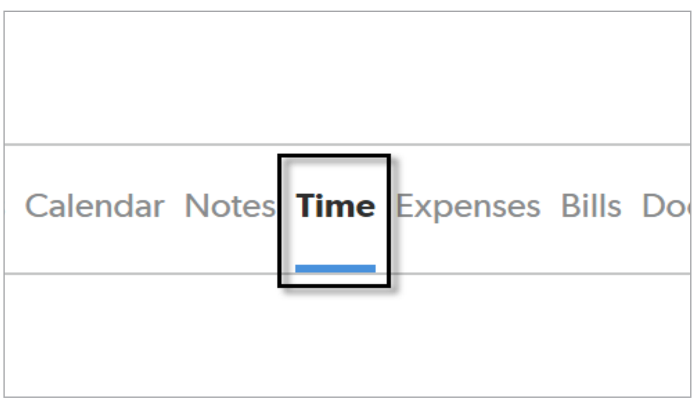
Time Entries

Time Entries track billable work done on Matters. Create Time Entries to charge your client for the work you perform.

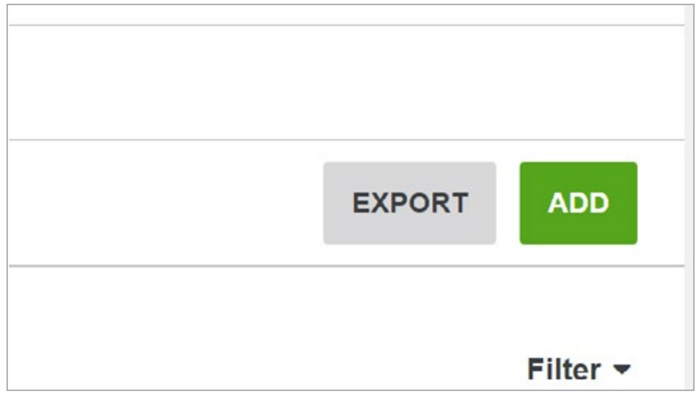
1. Open your client's Matter.



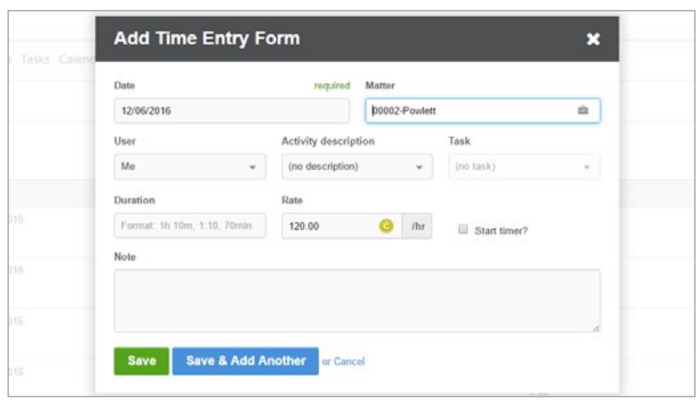
2. Select the Time Tab within the Matter.



3. Click Add on the right hand side.



4. Input your Time Entry details, and click Save at the bottom.

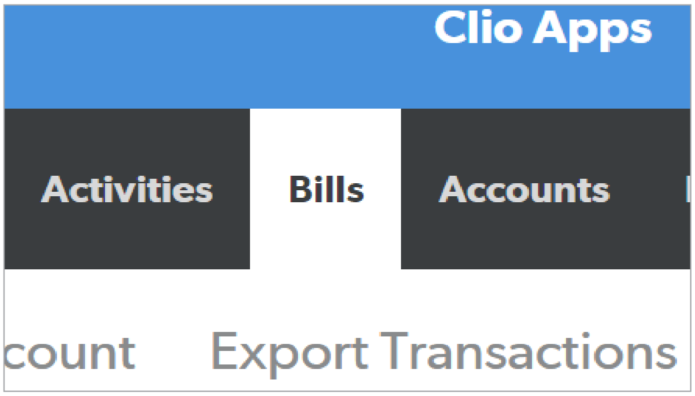


More details can be read in the Time and Expense Support Articles.

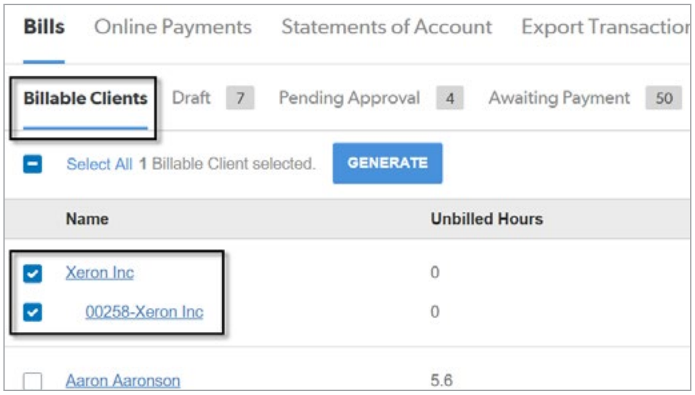
Billing

Bills can be paid by Direct Payment, which won't pull funds from an account, or they can be paid from a Trust or Operating Account.

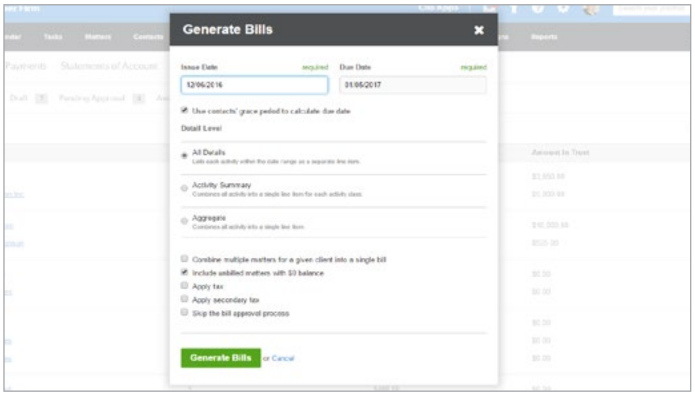
1. Select Bills at the top of Clio.



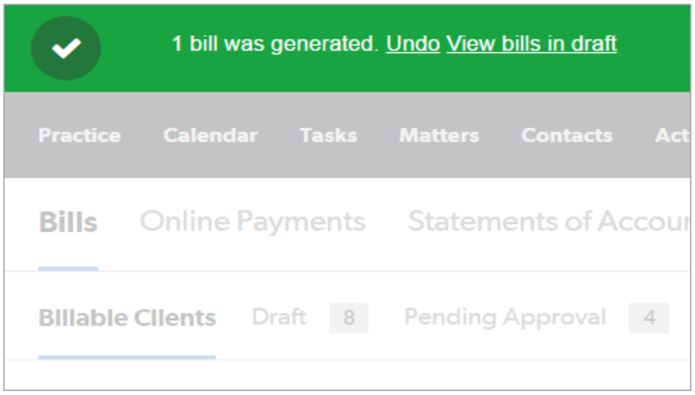
2. From Bills, select Billable Clients on the left hand side. Then, check off your Clients and Matters you are billing.



3. Input your Bill details, such as inclusion of tax, and select Generate Bills.



4. Click the underlined link "View bills in draft" to see the Draft section where the bill was generated to.

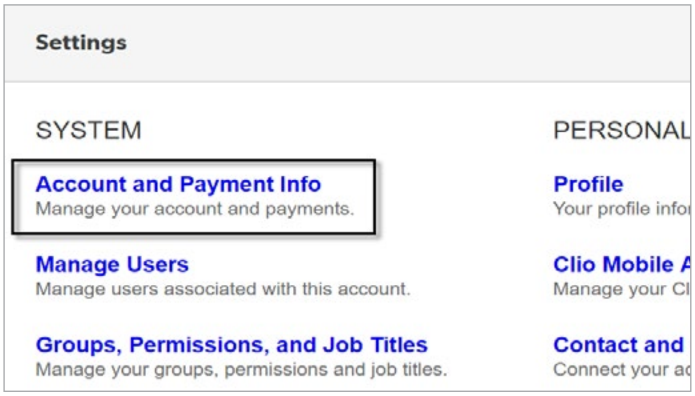


More details can be read in the [Billing Support Articles](#).

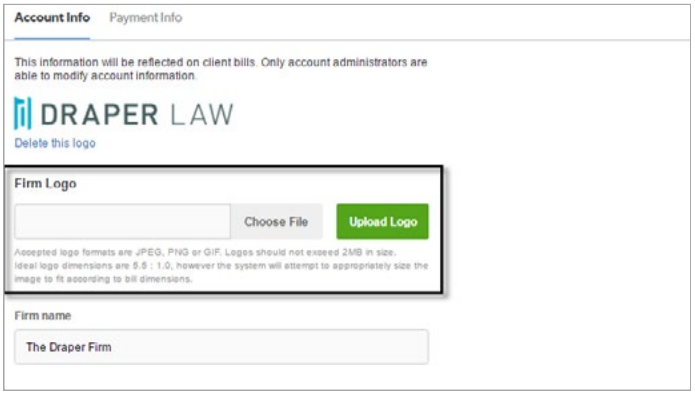
Firm logo and information

The Firm logo and additional information is populated on Bills to better represent your firm's unique identity and to display billing address information.

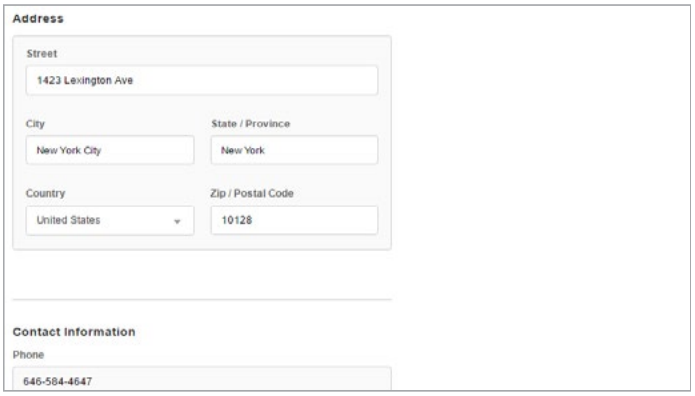
1. From Settings, select Account and Payment Info.



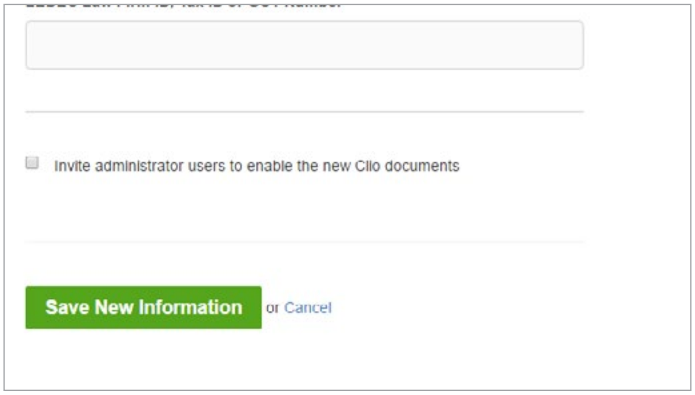
2. In the first section of Account Info, select your logo by clicking "Choose File", and then select "Upload Logo".



3. Scroll down further, and input your Firm information including a Firm Address and a Phone number.



4. When all information fields have been populated, select "Save New Information" at the bottom of the page.



More details can be read in the [Account Settings Support Articles].

Further Training:

Clio Product Pro

A guided learning Experience

After our Webinar, our users should feel more comfortable using our standard tools. For a more in-depth training experience, give Clio Product Pro a try!

Clio Product Pro Certification provides the opportunity to learn the ins and outs of Clio through a self-paced, guided learning experience. You'll start things off with an understanding of what it really means to work "in the cloud" and how to do so ethically and securely. Then, we'll explore all of our features and functions to ensure that you are absolutely comfortable managing your practice in Clio.

Sign up today at clio.com/clio-product-pro

Clio® Product Pro