

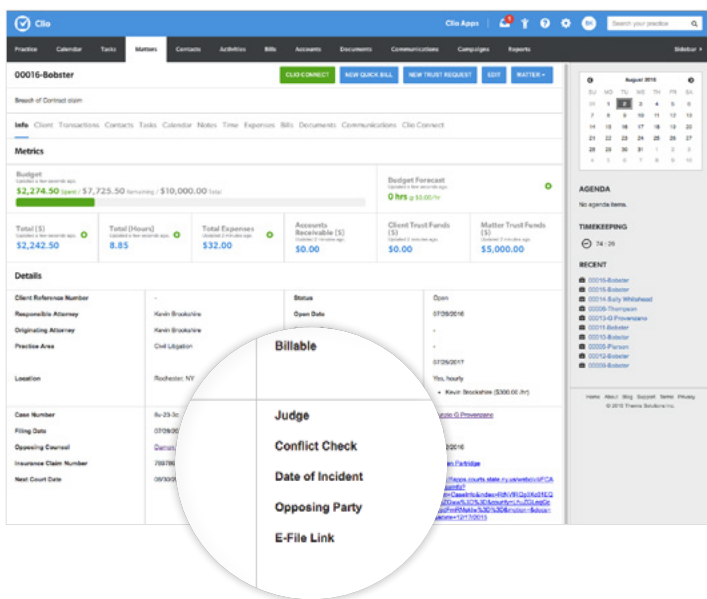
Customizing Clio:

A Guide for Civil Litigators



Custom Fields

From upcoming court dates to incident history, have all necessary information you need in one place. Simply build your Custom Field sets, apply to your Matters or Contacts, and never miss an important detail again.



Simplify accessing information in Clio with default Custom Fields for all Matters and Contacts. Create Custom Fields by clicking Clio Settings Panel > System > Custom Fields, and use our guide below as a template.

For more tips and information see our [support article on creating Contact & Matter Custom Fields & Sets](#).

Matter Field Name	Field Type
Case Number	Text (One-Line)
Opposing Counsel	Contact Select
Opposing Party	Contact Select
Judge	Contact Select
Court	Contact Select
Circuit	Picklist
Filing Date	Date
Date of Incident	Date

Matter Field Name	Field Type
Next Court Date	Date
Insurance Claim Number	Text (One Line)
Conflict Check	Checkbox
Contingency	Checkbox
Retainer	Money
Referral Source	Contact Select
Special Notes	Text (Multi-Line)

Please note Custom Fields are available to our Legacy, Boutique, and Elite customers. To upgrade today, call 1-888-858-2546—or upgrade instantly in-app. For more tips and information see our [Support site](#).