

Getting started in Clio: Your first 30 days



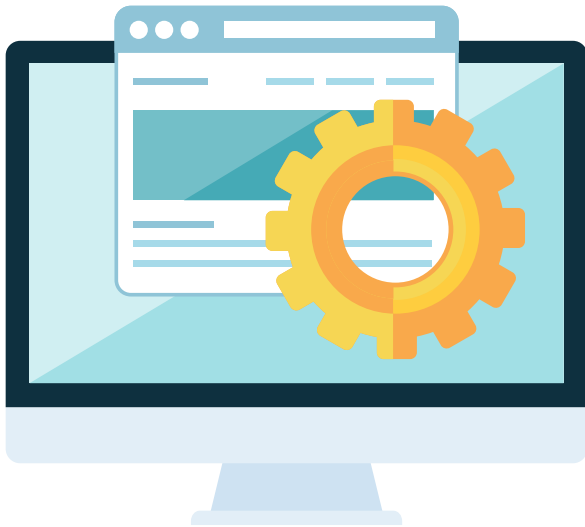
Getting started in Clio: Your first 30 days

Making the decision to invest in your business and purchase law practice management software is a pretty big deal. Actually acting on your decision and following through on the purchase means that you're now on your way to building a more profitable business. And because you have chosen Clio, you're also going to get more out of your practice.

With a little planning, you can build a solid foundation to grow your practice. Here, we give you a bit of guidance in setting up some basic Clio functions.

We'll explore three easy steps to getting you set-up in Clio and ready to roll:

- 1 Defining your law firm**
- 2 Defining your practice**
- 3 Invoices and payments**



Set up bank accounts

Menu bar/Accounts/Bank accounts

You'll need to set up two bank accounts in Clio: an operating bank account and an IOLTA/trust bank account.

- Account Name: ABC Law Firm Operating Account or ABC Trust Account
- Opening balance:
 - For the operating account opening balance, enter your YTD fee and expense income collected.
 - For the trust account opening balance, enter zero balance. Once you've brought over clients and matters into Clio, you can add the individual amounts you are holding in trust to the appropriate client and matter.
- Select Operating account as the default.

Tip

Your Clio operating bank account is a snapshot of your law firm's income and your trust account is the total of your client trust funds. The balance in your Clio operating bank account should match your accounting system's YTD income accounts, which represent fees and client paid expenses. At the end of each fiscal year, you can reset your Clio operating bank balance so that it's always a reflection of your YTD income accounts. Your Clio trust account balance should match your actual trust account bank register at all times.

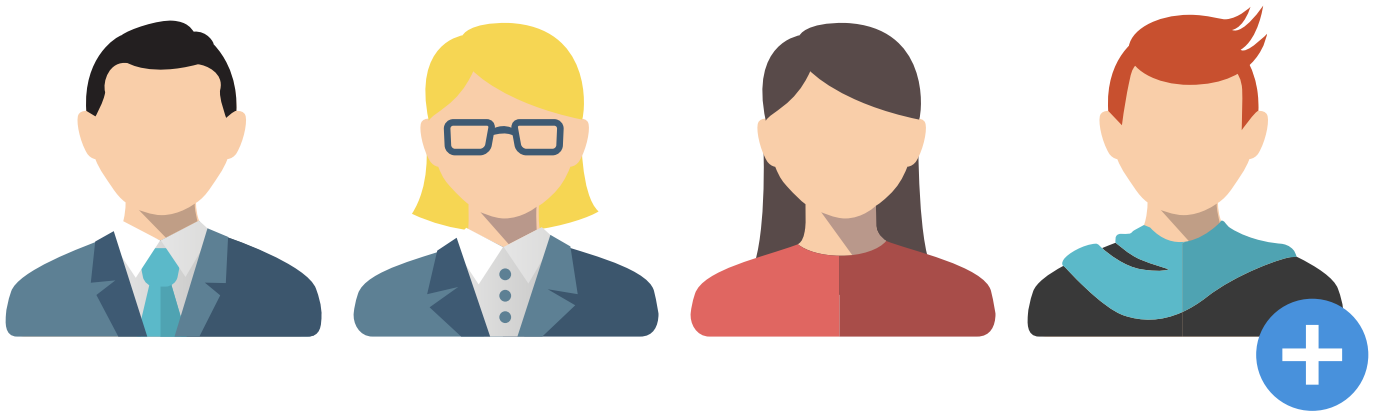
1 Defining your law firm

Clio lets you define your brand in a professional and polished manner, and helps you set up the basics that define your firm—from your accounts to your users, from your billing rates to your firm name:

Add firm information

Settings/Account and payment info

This information will show on your invoices and in Clio Connect, so the more complete your information, the more professional (and better) you'll look to your clients.



Add users

Settings/Manage users

This is where you add users and define their level of access to your system. **Read Permissions within Clio for more information.**

- Permission levels:
 - Administrator (you can have multiple administrators)
 - Accounts (can view bank account information)
 - Reports (can print reports)
 - Billing (can see and create invoices)
- Type:
 - Attorney
 - Non-attorney
- Firm groups:
 - In its simplest application, you can group users by practice areas

The first person to sign up for the account is by default the owner, a lawyer subscriber type, and an administrator—and can control the firm calendar. Only administrators can add, edit, or disable users. However, they can't reset passwords (we didn't want all that power to go to their heads).

Setting up users also determines your monthly Clio fees. When you add users for the first time, they'll receive an email confirmation to set up their individual account with User ID (email address) and password.

After new users accept your invitation, as administrator, you can then set billing rates and set their ability to view other users' billing rates.

Tip

User Initials in user settings are printed on invoices as an alternative to printing out their full names.

Billing rates

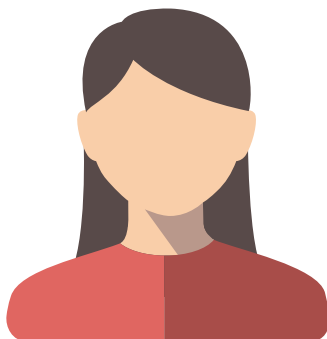
Clio has four levels of billing rates that follow a priority. Get to know them and take some time to understand how they work. Activity rates are nice if you want to do task-based rates for emails, phone calls, or research.



i *User (D) billing rates are the default and lowest level*

User-defined rate set when adding new users

Billing Rate		Billing Rate Visibility
300.00	\$/Hr	All
This user will see all rates when creating time entries.		



ii *Activity Description rates (A) will override User rates*

Activity rates: 3 options

Add Activity Description ✕

Name required
<input type="text" value="Email Follow-up with Client"/>
Billing Method
<input type="text" value="Custom Rate"/>
Rate
<input type="text" value="\$175.00"/> /hr
Groups
<input type="text" value="Everyone"/>
Visible to Co-counsel?
<input type="checkbox"/> Yes
<input type="button" value="Save"/> or <input type="button" value="Cancel"/>



- iii *Client (C) level rates will override Activity*

Client billing rate when setting up new contact

Billing Rates **Contact/Client Billing Rates**
(Default: \$300.00/hr)

Don Draper ▾ Rate: 200 /hr ✕

+ Add a custom rate



- iv *Matter (M) level rates are the highest priority*

Matter billing rate set when creating the new matter

Matter Billing

One or more billable matters can be used to create an invoice for a client.

This matter is billable

Hourly (Default: \$225.00/hr) + Add a custom rate

Don Draper ▾ Rate: 175 /hr ✕

Users

- Don Draper
- Joan Harris

Groups

- Everyone
- Criminal Group
- Employment Group
- Family Law
- Firm Partners
- Joan Harris

not automatically be reflected in the



2 Defining your practice

Clio has a lot of flexibility with predefined lists, custom fields, and matter and contacts setup. Understanding these areas will help you get a head start:

Setting up practice areas

Settings/Practice/Practice areas

Clio comes with a list of predefined practice areas to make things easier for you, but you may find that not all of them are applicable to your practice. (Every new matter requires that you fill in a practice area.) Keep only the practice areas relevant to your practice to make sure that you minimize the possible errors.

Activity descriptions

Menu Bar/Activities/Activity descriptions

In Clio, activity descriptions are used in many areas and are designed to save time and ensure consistency. They can also be used for shortcuts, so learning how to use activity descriptions will help you save even more time. Activity descriptions are firm-wide settings and are used in these areas:

- Time entries
- Setting up flat-fee matters

There are three types of rates used when defining activity descriptions: User Rates, Flat Fee Rates, and Custom Rates.

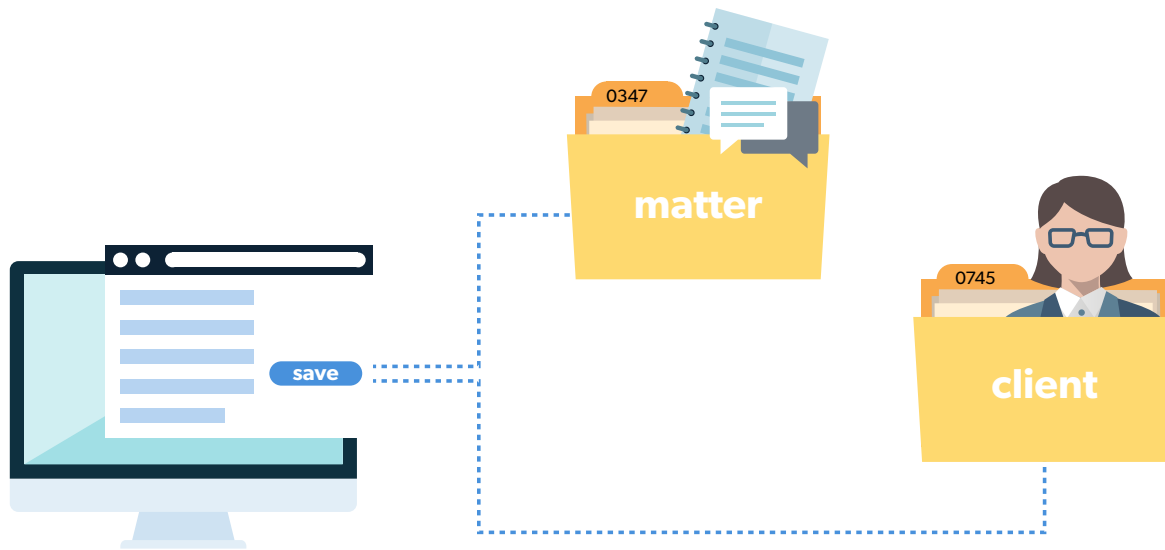
Tip

Activity rates are firm-wide and apply to all users. User rates change based on the user's default rate.

Entering time entries using Activity Descriptions

Flat Fee Activities Rates

Task-based Activity Rates



Matter numbering

Settings/Practice/Matter numbering

- Clio allows for great flexibility when setting up how your matters will be numbered and named; it's a simple and convenient way for you to identify your matters.
- Fret not, whatever numbering or naming convention you define from day one can be changed later.

Tip

If you are integrating with a document source like Box, keep in mind that Clio and Box are working together to create Client and Matter level folders for storing client/matter documents. If you change the matter numbering system, you may inadvertently create a new client/matter folder with the new naming convention in place.

Custom fields

Settings/Custom fields/Matter level/Client level

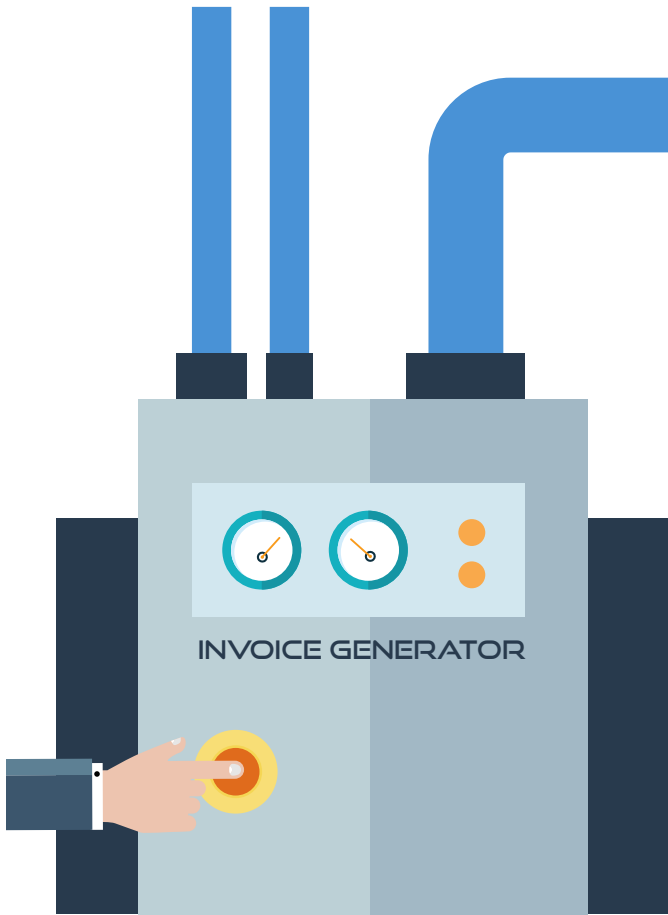
Since you want to set up your system from day one to capture all the data relevant to your business, clients, and matters, it's important to understand how Clio's custom fields are used. Think of your client intake form (you should have one of these) and what fields you are capturing when filling out this form. Now think of adding your intake data as custom fields in Clio.

There are two levels of custom fields:

- Client Level: Data important to capture at the client level
- Matter Level: Data specific to each matter

Tip

Don't set up people via custom fields. This should be done through the contacts matter tab by adding relationships. For example, add an expert witness as a contact on the matter with a relationship called "Expert Witness."



Invoice settings

Settings/Billing/Bill themes

To get started, focus on developing an invoice that's easy to read and that includes payments and trust account information—pretty simple stuff. The default invoice template that comes with Clio is a great place to start. As you learn more about Clio, you can customize your invoice with some nifty modifications.

Select firm information to include:

Firm information/Address

Page Setup	Title	<input checked="" type="checkbox"/> Include Firm Address
Localizations	Logo	<input checked="" type="checkbox"/> Include Firm Phone Number
Watermark	Address	<input type="checkbox"/> Include Firm Fax Number
Header		<input checked="" type="checkbox"/> Include Firm Email
Invoice Information		<input checked="" type="checkbox"/> Include Firm Website
Firm Information		
Client Information		
Table Configuration		
Matter		
Interest		
Statement of Accounts		
Footer		
Remittance Slip		

Separate fees from expenses:

Matter/Lines items/Split time, expenses, products

Page Setup	Heading	<input checked="" type="checkbox"/> Split Time, Expenses and Products
Localizations	Matter Number	<input checked="" type="checkbox"/> Show Individual Matter Payments
Watermark	Matter Description	<input checked="" type="checkbox"/> Show Service (Hours) Totals
Header	Line Items	Attorney Display (if showing)
Invoice Information	Attorney Summary	<input type="radio"/> Attorney Initials
Firm Information	Services/Combined Orderings	<input type="radio"/> Attorney Name
Client Information	Expense Orderings	<input checked="" type="checkbox"/> Include activity descriptions in line item descriptions
Table Configuration	Product Orderings	<input type="checkbox"/> Show Descriptions on new line
Matter		<input type="checkbox"/> Show Line Item Discount Subtotal
Interest		<input checked="" type="checkbox"/> Show Subtotals
Statement of Accounts		
Footer		
Remittance Slip		

Include trust account transactions:

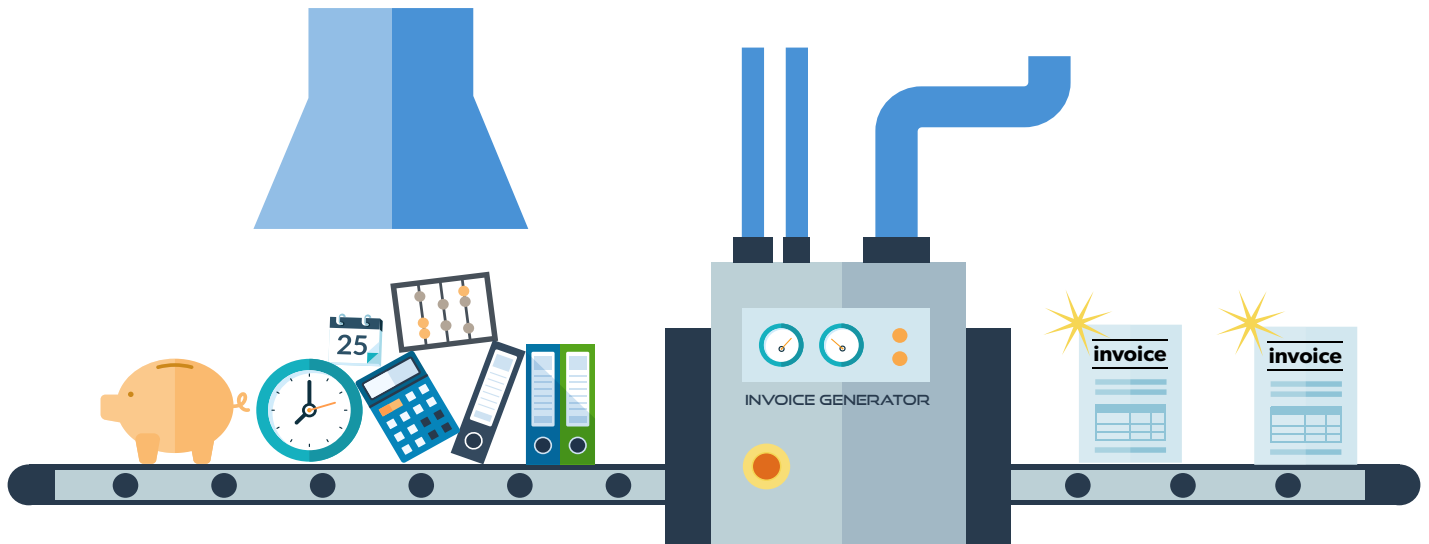
Statement of accounts/Summary of accounts

Page Setup	Summary of Accounts	Show Summary Statement
Localizations	Detail of Accounts	<input type="radio"/> Hidden
Watermark	Client Account	<input type="radio"/> Above Line Items
Header		<input checked="" type="radio"/> Below Line Items
Invoice Information		Summary Detail Level
Firm Information		<input type="radio"/> Outstanding Balance + New Charges = Total
Client Information		<input type="radio"/> (Outstanding Balance + New Charges)
Table Configuration		<input type="radio"/> - (Payments) = Amount Outstanding
Matter		<input checked="" type="radio"/> (Outstanding Balance + New Charges)
Interest		<input type="radio"/> - (Amount in Trust + Payments) = Amount Outstanding
Statement of Accounts		
Footer		
Remittance Slip		

3 Invoicing and payments

Here's a common question: "I just installed Clio. How do I generate an invoice?"

Well, it's easy!



Create invoices

Menu Bar/Bills/New bills

The New Bills screen will list all the matters that have unbilled time entries and expenses; these matters are ready to have an invoice created. Choose the matter to bill (you can pick more than one) and click Generate Bills.

To the right is an example of what you'll see for each matter you selected to bill. For your first few bills, keep it simple and use the default **Detail Level = All Details**.

The next screen will be a list of your new bills. From here you can preview each bill by clicking on the ID number. Taking this route also gives you an opportunity to change the bill before printing and sending a final copy.

Issue Date required

Use contacts' grace period to calculate due date

Detail Level

- All Details
Lists each activity within the date range as a separate line item.
- Activity Summary
Combines all activity into a single line item for each activity class.
- Aggregate
Combines all activity into a single line item.

Combine multiple matters for a given client into a single bill

Include unbilled matters with \$0 balance

Apply tax

Apply secondary tax

Skip the bill approval process

Bills

Billable Clients **Draft** 5 **Pending Approval** 0 **Awaiting Payment** 47 **Paid** 99+ **All**

Select All Filter ▾

ID	Due In	Issued On	Client	Matter(s)	Balance
<input type="checkbox"/> 817 <small>New</small>	30 days	07/28/2014	Stephanie Harvey	00008-Harvey	\$200.00
View Edit Submit for Approval Approve Clio Connect Download Delete					

Here's your preview invoice screen. A few things to note:

- You can delete this invoice and start all over. No harm done.
- You can edit the bill: change date, change time entries, change descriptions, etc.
- Select "More" to change the invoice template being used or modify the client address or footer information for this bill.
- You can send the invoice to the client via Clio Connect or save it as a PDF to print and mail.

Invoice #817

Invoice Detail Clio Connect Download Edit Submit for Approval Approve Delete

Invoice Number: 817	State: Draft
Client: Stephanie Harvey	Bill Total: \$200.00
Matter: 0008-Harvey	Paid: \$0.00
Issue Date: 07/28/2014	Credits Issued: \$0.00
Due Date: 08/27/2014	Due: \$200.00

Preview Fees

More

Invoice # 817 - 07/28/2014

DRAPER LAW
 1432 Lexington Ave
 New York City, New York 10128
 United States
 Phone: 778-881-0881

BILL

Invoice # 817
 Date: 07/28/2014
 Due On: 08/27/2014

Now, your Clio invoice might look a little like this: something your client will find easy to read, understand, and pay (your whole reason for sending the invoice). There is a lot you can do with the invoice templates, but let's review the basics first.

DRAPER LAW **BILL**

1432 Lexington Ave
 New York City, New York 10128
 United States
 Phone: 778-881-0881

Invoice # 817
 Date: 07/28/2014
 Due On: 08/27/2014

Ms. Stephanie Harvey

0008-Harvey
 Divorce

Date	Description	Attorney	Rate	Time	Total
07/09/2014	Communications: Phone Call	DD	\$250.00	0.80	\$200.00
Quantity Subtotal			0.8		
Time Total			0.8		
				Subtotal	\$200.00
				Total	\$200.00

Statement of Account

Outstanding Balance	New Charges	Amount in Trust	Payments Received	Total Credit
(\$0.00	+ \$200.00)-(\$2,000.00	- \$0.00)= \$1,800.00

Please make all amounts payable to: The Draper Firm
Our office accepts Visa and MasterCard! Please call to arrange payments.
 Please pay within 30 days.

Receive payments

Menu Bar/Bills/Open bills

Now that you've set up Clio, it's time to get paid. There are two places where you can receive payments on invoices.

- At the Invoice view (pg 12) by selecting “Payments”
- Or at the Matter view by selecting “Transactions” and “Add”

Client **Transactions** Contacts Tasks Calendar Notes Time Expenses Documents Communications Clio Connect

Ledger Add

IOLTA Trust ▾

Select “Receive Bill Payment.”

This method lets you select which open invoice you are applying the payment to.

Record Transaction Transfer Funds **Receive Bill Payment**

Invoice Date required

Invoice #817 \$200.00 07/28/2014

Invoice #917 \$200.00

Payment for invoice #817

Matter	Source	Destination	Due	Payment
00008-Harvey:	IOLTA Trust: \$0.00...	Draper Firm Operat...	200.00	200.00
				Subtotal 200.00
				Total Payment 200.00
				Balance Due 0.00

Receive Payment or Cancel



Tip

No matter how much of a hurry you're in, add a description to this payment so that if you need to remember anything about how it was paid, you have the information at your fingertips. For example, list whether it was paid by credit card, check (list check number), or cash.

One of Clio's most useful features: You can write off amounts very easily. In the example below, the client paid \$175 and you opted to write off the other \$25. The client will see this on the paid invoice and you can add a note as to why you wrote it off.

Matter	Source	Destination	Due	Payment
00008-Harvey:	Direct Payment (C... ▼	Draper Firm Operat... ▼	200.00	175
			Subtotal	200.00
			Total Payment	175.00
			Credit Note	25.00
			Balance Due	0.00

Write off the remaining \$25.00

Note: *Source vs. Destination when receiving payments: the destination is always your Operating account. The Source may be your IOLTA (trust) account if you're using funds on deposit to pay this invoice. But most of the time, it will be the source called "Direct Payment (Cash)".*

Source	Destination
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;">Direct Payment (C... ▲</div> <div style="background-color: #0070c0; color: white; padding: 2px;">Direct Payment (Cash)</div> <div style="padding: 2px;">Draper Law Trust Account: \$2,000.00 (Client Balance)</div> <div style="padding: 2px;">Draper Firm Operating Account: \$0.00 (Client Balance)</div> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;">Draper Firm Operat... ▼</div> </div>

Verify payments and bank account

One of Clio's strengths is the depth and simplicity of its reporting functions. The Bank Activity Report is a great report to run weekly to verify your payments entered in Clio; you can compare this to your bank or accounting system's payment/deposit detail and see if they match. (They should.)

Bank Account Activity Report (07/28/2014)						
Date: 07/28/2014						
Draper Firm Operating Account						
Date	Source/Recipient	Client	Matter	Funds Out	Funds In	Balance
07/28/2014	Transferred from: IOLTA Trust for invoice #807 (Payment for invoice #807)	Maxwell Payne	00095-Payne		600.00	600.00
07/28/2014	Payment from cash for invoice #817 (Payment for invoice #817)	Stephanie Harvey	00008-Harvey		200.00	800.00
Closing Balance:				\$0.00	\$800.00	\$800.00

Now, you've got a good foundation for using Clio to manage your firm and practice law. There's always more to learn and Clio will always keep you informed about new features being added. Keep an eye out for these and be sure to implement these new features into your workflow as they'll make your practice—and your life—easier.

After you've mastered the basics, explore these other useful features and really put the turbo boosters on your firm:

- Clio Connect
- Clio document templates
- Tasks
- Calendaring

Produced in collaboration with

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