

# Setting up your Clio account for success

- Bookmark Clio in your browser
- Update your profile information
  - Default billing rate
  - Name and initials
  - Time zone
- Update your security settings
  - Update your password if you received a temporary password
  - Set up two-factor authentication with your smartphone (suggested)
  - Increase your firm's password strength requirements (suggested)
- Update firm information
  - Upload your firm's logo
  - Ensure firm name, address, and contact information are correct
- Add additional users as needed
- Billing settings
  - Default currency
  - Tax rates
  - Time rounding
- Set up payment profiles
- Bill Themes (optional)
  - Show firm information and logo
  - Split time and expense entries into separate tables
  - Display client trust account
- Create an operating account
- Create custom fields (optional)
- Share calendar
- Set up calendar sync (optional)
- Set up Clio Payments (optional)



Need more detail? Watch the [How to Setup Your Account](#) video.

