Setting up your Clio Grow account for success

- ☐ Update password
- ☐ Invite users (admin only)
- ☐ Update law firm information
  - ☐ Upload logo
  - ☐ Create letterhead
- ☐ Connect to Clio Practice Management (optional)
  - ☐ Import Clio contacts (strongly recommended for Clio users)
  - ☐ Sync Custom Fields from Clio
- ☐ Sync Calendar
- ☐ Create Custom Fields
- ☐ Sync email
  - ☐ Update email signature
- ☐ Sync email-based calendar (optional)
- ☐ Update Contact settings
  - ☐ Update lead sources
  - ☐ Add Contact Types
  - ☐ Add Contact Tags
- ☐ Update Matter settings
  - ☐ Add Matter Types
  - ☐ Update Matter Statuses
  - ☐ Add Matter Locations
- ☐ Update Email Templates
- ☐ Create Workflow Templates
- ☐ Link integrations

Need more detail? Review our **How to Setup Your Account** video.