

This quickstart guide is a great place to begin your journey in Clio! If you're interested in a more comprehensive setup guide or are setting up an account with multiple users, you may want to take a look at [this guide](#).

[Adding Your Logo](#)

[Creating a Contact](#)

[Creating a Matter](#)

[Adding Time](#)

[Generating a Bill](#)


Adding Your Logo

Once you log into your Clio account for the first time, adding your logo can be just what you need to feel like the account is yours and to signify to any other users which account they are logging into.

Settings > **Account and Payment Info**

Account Info Payment Info

This information will be reflected on client bills. Only account administrators are able to modify account information.

 [Delete this logo](#)

Firm Logo

Accepted logo formats are JPEG, PNG or GIF. Logos should not exceed 2MB in size. Ideal logo dimensions are 5.5 : 1.0, however the system will attempt to appropriately size the image to fit according to bill dimensions.

Firm name

Address

Street

City State / Province

Country Zip / Postal Code

Additionally, [adding your firm logo](#) means that any bills you generate will pull that logo into the bill, representing your brand and firm identity to your clients.

Creating a Contact

Now that you've added your firm's logo, it's time to [create your first Contact](#). This can be a new client that just walked in the door or a client that you are looking to work on first.

Edit Person

You can also [import contacts](#) from other applications and file formats. For more information, you can read our support article on [how to import contacts into Clio](#).


Prefix

Reset ▾

First name

Last name

Company



[+](#) Add a company

Title

Custom Fields

Birthday [Remove](#)


Creating a Matter

Once you've added the Contact to your Clio account, the next step is to [add the matter](#) for that person or company.

Create New Matter

Matter Client

Find Client required

Brenda Hunt 


[Add A Person or Add A Company](#)

Matter Information


Description required

Open Date	Close Date	Pending Date
06/18/2015	mm/dd/yyyy	mm/dd/yyyy

Status required

Open 

Practice Area

Choose a practice area 

[Add A Practice Area](#)


Client Reference Number

Responsible Attorney

Select an attorney 

If it is a flat rate matter, the responsible attorney receives the flat fee by default.

Originating Attorney

Select an attorney 

Matters are where most Clio customers live and breathe their day-to-day and where you can log time, expenses, upload documents, and generate bills for that specific matter.

Adding Time

Once your matter is created, you can immediately [start logging time](#).

Add Time Entry Form
✕

Date

Matter

User

Activity description

Duration

Rate

Start timer?

Note

Save
Save & Add Another
or Cancel

Generating a Bill

Once you've added any time or expense entries you needed, you can immediately [generate a bill](#) for your client and send it to them to [receive payment](#).

PREVIOUS NEXT

Invoice #1274

Invoice Detail •• Click, Context, Receive Payment, Download, Edit, Void

Invoice Number 1274	Status Awaiting Payment
Client Brenda Hunt	Bill Total \$1,545.00
Matter 00001-Hunt/Divorce	Paid \$0.00
Issue Date 06/12/2015	Credits Issued \$0.00
Due Date 07/12/2015	Due \$1,545.00

Preview Fees Payments Credit Notes

MORE

Invoice # 1274 - 00001-Hunt/Divorce - 06/12/2015

DRAPER LAW

1423 Livingston Ave
New York City, New York 10128
Phone: 406-564-6447
Fax: 616 Number

Invoice

Invoice # 1274
Date: 06/12/2015
Due On: 07/12/2015

Brenda Hunt
719 Delta Road
Queens, NY 11371

Statement of Account

Outstanding Balance	New Charges	Amount in Trust	Payments Received	Total Credit
(\$0.00	+ \$1,545.00)-[\$0,000.00	+ \$0.00]-= \$3,495.00

Please make all amounts payable to: The Draper Firm

00001-Hunt/Divorce
Divorce

Client Reference Number:

Date	Attorney	Type	Description	Time	Rate	Total
06/01/2015	Don Draper	Service	Matter - Research	3.00	\$300.00	\$1,225.00
06/09/2015	Don Draper	Service	Meeting - Office	0.60	\$300.00	\$210.00
06/11/2015	Roger Sterling	Service	Client Communications - Phone	0.40	\$150.00	\$60.00
06/12/2015	Roger Sterling	Service	Admin - Document Filing	1.00	\$50.00	\$50.00

Quantity Submitted 5.5