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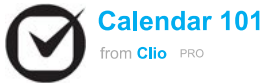
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# Calendar 101 Video

Clio Training Team  
November 24, 2014 14:27

This Video Covers:

- Add Events
- Share your Calendars with other members of your firm
- Setting your default view
- Creating a New Calendar



04:20



HD

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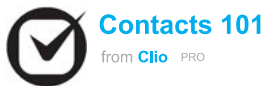
[Clio Support](#) > [General](#) > [Contacts](#)

# Contacts 101 Video

Clio Training Team  
November 24, 2014 14:24

This Video Covers:

- Viewing/Sorting Contacts
- Review of sub-tabs within a Contact card
- Creating a new Contact
- Modifying and Deleting Contacts
- Relationship between Companies and Employees



05:23



HD

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# What are Calendar Feeds and how do I use them?

Clio Training Team  
November 03, 2014 12:35

## Feeds vs. Sync

A feed is a push of your Clio calendar on a regular basis to a third-party calendaring application like Apple iCal or Yahoo. If you make changes in your Clio calendar you will see this in your calendaring application. However, you cannot make changes in Apple iCal, for example, and have them reflected back to Clio.

A sync can be set up to be bi-directional so if you make changes in one application it shows up in the other. The only applications that Clio currently syncs to are [Google](#) and [Outlook](#).



## What does iCal mean anyway?

iCal stands for iCalendar and is a computer file format. [Click here](#) for more information.

## How do I know what to choose in the Calendar Feed page?

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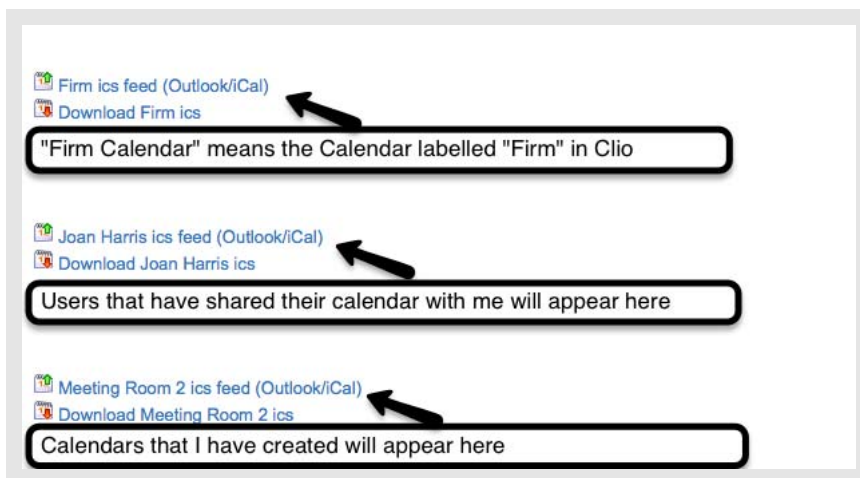
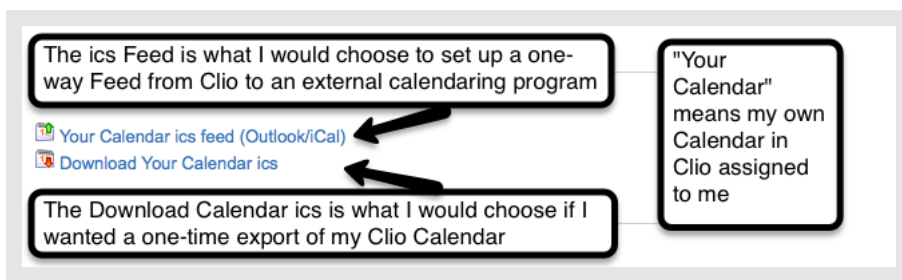
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There is a lot of information in this page, so let's break it down:



The "All Visible Calendar" option refers to any and all Calendars that you have access to/have been shared and you are able to Feed them.

### How do I set up the Calendar Feed?

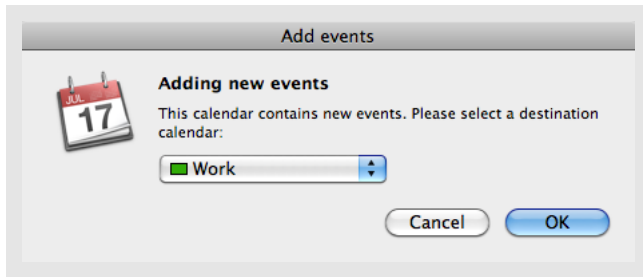
To set up the calendar feed, follow the instructions [here](#).

### What do I do if I want to use the download Calendar ics or I'm leaving Clio?

The download calendar ics will allow you to take a copy of your calendar away. This is not a feed but a one time dump. To get your calendar download:

1. Go to <https://app.qoclio.com/calendars/feeds>

2. Click on the download option for the calendar you want to download.
3. Click on the ics file. You may be provided with a pop up from your computer's calendaring program, like Apple iCal:



If not, save the ics file to your computer in a location you can find it.

4. If you are using iCal you will choose the work/home calendar and click on OK. Once you do so, your calendar appointments will be added to iCal.

Here are links to provide instructions on importing your Clio calendar to an external calendaring program:

[iCal](#)

[Outlook](#)

[GMail](#)

If your calendaring application is not noted above, do a search in your program's help resources for "How do I import my calendar".

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Clio Support > General > Google Sync

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# Syncing your Google and Clio Calendar with Clio Sync for Google

Clio Training Team  
October 31, 2014 14:29

You can sync your Clio Calendar with your Google (Gmail or Google Apps) account following our simple steps! This is a bi-directional sync, meaning if you make changes in one end it will be reflected in the other (ie: creating new appointments or deleting appointments).



Click [here](#) for instructions on increasing the size of the video or [view it on Vimeo](#).

1. Click on your name at the top of the page and click on "Settings". Next, click on "Google Sync":

<p><b>SYSTEM</b></p> <p><b>Manage Users</b> Manage users associated with this account.</p> <p><b>Custom Fields</b> Create individual custom fields or custom field sets.</p>	<p><b>PERSONAL</b></p> <p><b>Google Sync</b> Connect your account to Google Sync.</p> <p><b>Apps</b> Authorize 3rd party apps like Xero and Netdocs.</p>	<p><b>CLIO SETTINGS</b></p> <p><b>Practice</b> Practice performance, areas, and matter numbering.</p> <p><b>Bill Settings</b> Edit your bill settings.</p>
--	--	--

2. If you are already connected to Google, skip to step 3.

If not, check the items you want to connect Clio to and then "Authorize Google Access":

**Google Sync**

---

**Allow Clio to access the following Google products**

Google Calendars

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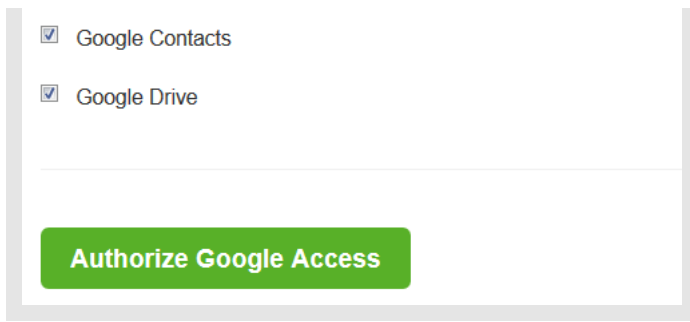
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3. Next, choose the link button next to the calendar name to set up the sync:

Syncable Clio Calendars				
Clio Calendar	Google Calendar	Linked to Google?	Last Synced On	
Don Draper		Not Linked	-	

4. You will now choose if you would like to link to a new Google Calendar or an Existing Google Calendar. Click [here](#) for further instructions on this choice:

**Linking your Clio Don Draper Calendar with Google**

**Link to a new Google Calendar**  
New Calendar Name:

For the best results we recommend you let Clio create a new Google Calendar for you. This will ensure you will have no duplicates created and if there is an issue you can remove the created Google Calendar.

**Link to an existing Google Calendar**  
Google Calendar:

You may choose an existing Google Calendar. This is useful if you have events in your Google Calendar that you would like to add to your Clio Calendar.

Note: if you have the same events in both Clio and your Google Calendar there is a chance duplicates will be created.

or

5. Your Clio Calendar will now be shown as linked to the Google Calendar (it is not yet synced). Please be aware that the initial sync between Google and Clio may take up to 24 hours (although it typically takes 1-2 hours).

Syncable Clio Calendars				
Clio Calendar	Google Calendar	Linked to Google?	Last Synced On	
Don Draper	Don Draper	Linked	-	

For information on how to sync your Firm Calendar click [here](#).

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Clio Support > General > Communications

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# Communications 101 Video

Clio Training Team  
November 24, 2014 14:31

This Video Covers:

- Managing E-Mails and Phone Calls
- Secure Messages
- Archiving Emails



03:37



HD

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# How do I send an email to Clio?

Clio Training Team  
November 03, 2014 09:23

Please note, if you wish to email communications using an email address other than the one you log into Clio with please click [here](#).

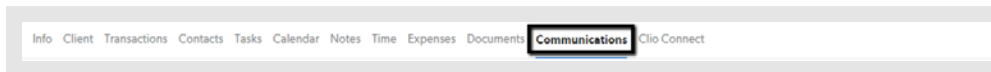
## Emailing Communications

You can send emails to Clio and link them to matters and people. This provides you with an archive and all firm users can quickly see relevant file emails.

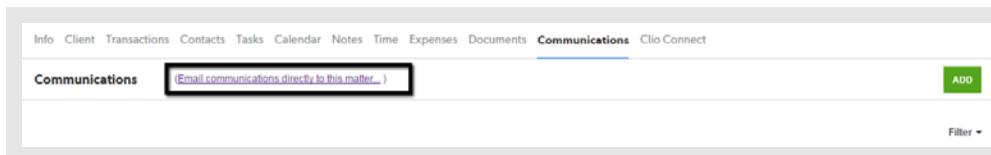
There are two ways to send emails to Clio, and it is based on personal preference.

### Via the Matter Maildrop

1. Go to the matter that you wish to link an email to and click on the "Communications" tab:



2. Click on the link "Email Communications Directly to this Matter":



3. From there you will see a pop-up box with your special email address. Use the clipboard icon to copy the email address:



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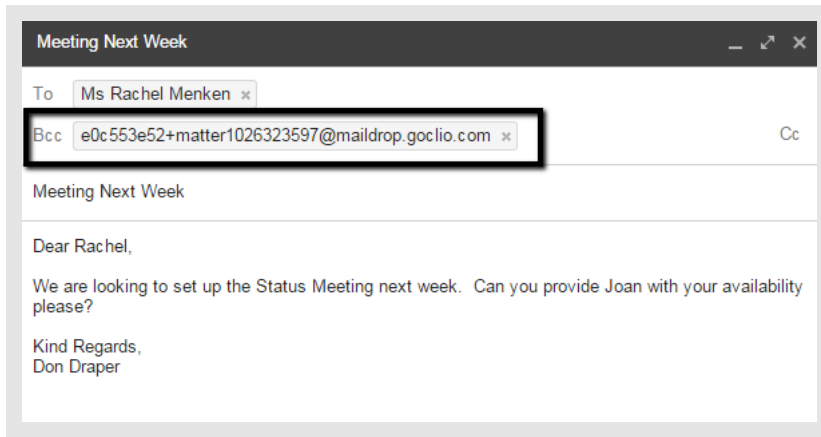
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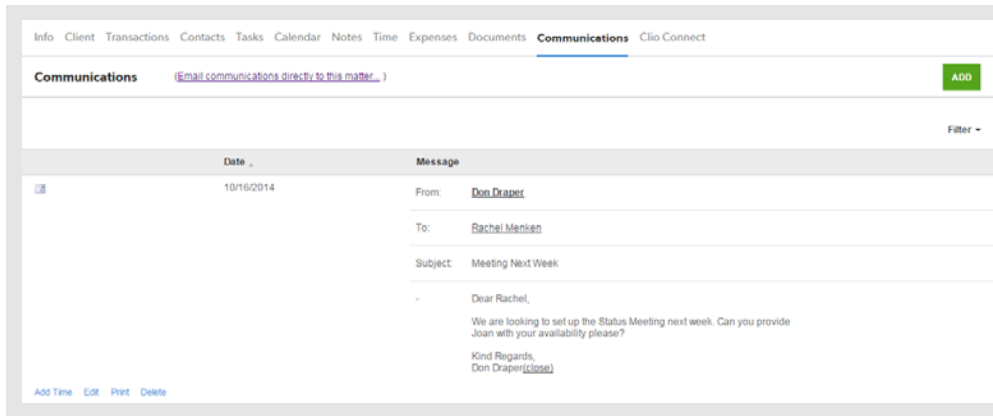
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Calls coming in outside of these hours will be handled on a best efforts basis.

4. Go to your email and copy the special email into your To: Bcc: or Cc: field and send:



Now when you go back to the Communications tab, you will see the email. If you have forwarded an email to the maildrop Clio will identify the correct To: and From: fields (*as long as the contacts are entered in Clio*). You will then be able to see the emails associated with the Contacts under the Communications tab of that Contact.

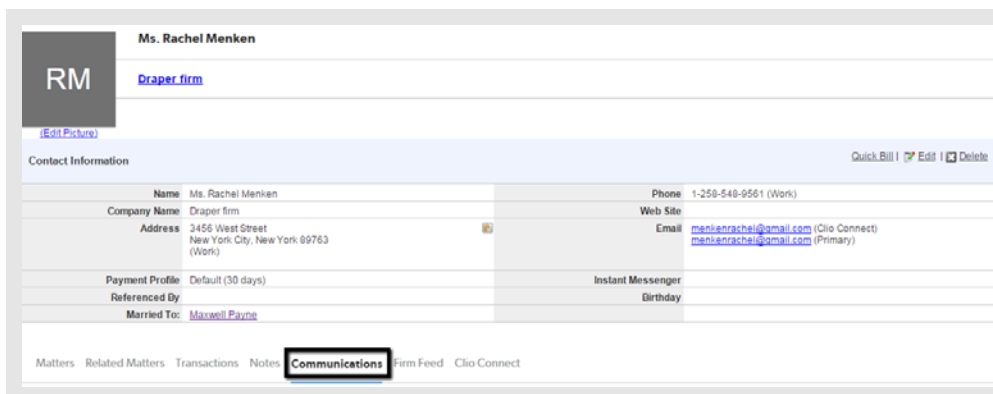


## What if I just want to send all the emails to the same place/use one email address?

### Via the Global Inbox

The Global Inbox is a complete list of all communications (phone calls, emails and secure messages) in the firm and is located here: <https://app.goclio.com/communications> for North American clients or <https://app.goclio.eu/communications> for European clients. We've seen above how each matter has its own special email address, but you are able instead to send everything to one email address - the Global Inbox.

1. The first step is to get the Global Inbox address. To do so, go to any contact in Clio (not a Matter) and click on "Communications":



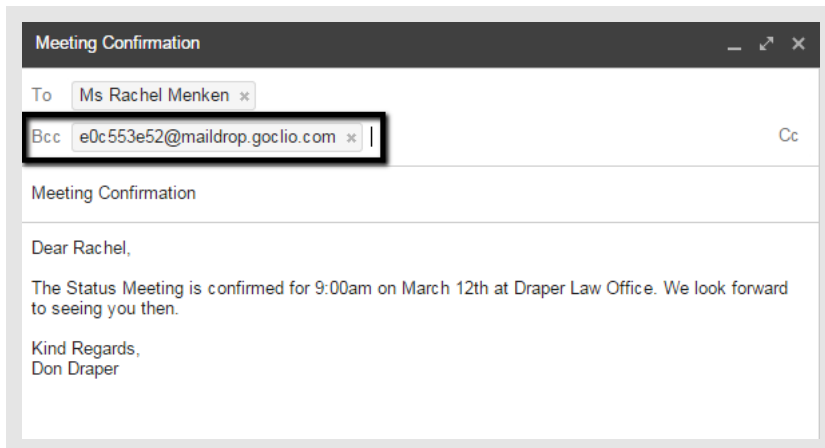
- Click on the link "Email Communications directly to your account":



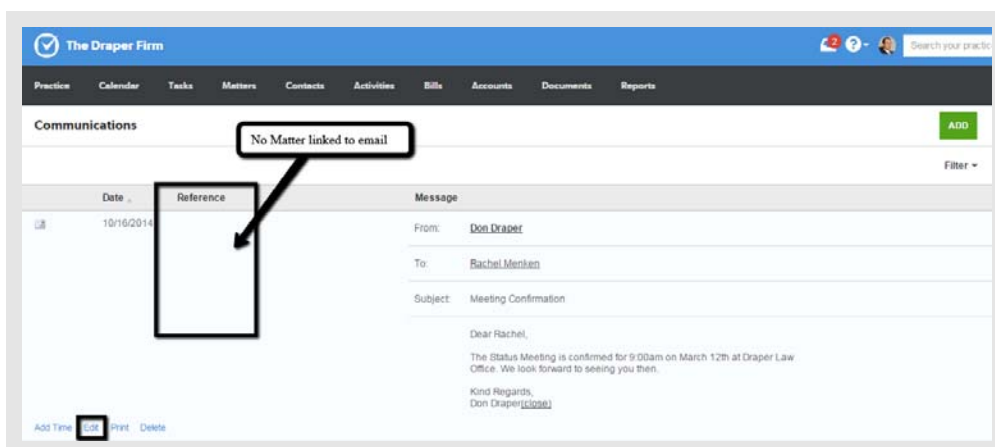
- You will now see the firm's global maildrop address. Click on the copy to clipboard icon:



- Go to your email and paste in the address into the To:, CC:, or BCC: field and send email:



- Now, go to <https://app.goclio.com/communications> for North American clients or <https://app.goclio.eu/communications> for European clients (delivery should take only a minute or two) and see the email there. You will note that there is no matter associated with the email. That is because we sent it directly to the Global Inbox. To associate a matter with this email, click on the "Edit" quick link, choose the appropriate matter and save:



**Edit Email Communication**
✕

**Type**

**Matter**

**Date**

**From**

**To**

**Subject** required

**Body** required

or

You will now see the email is linked to the correct matter:

Communications <span style="float: right; color: green;">ADD</span>		
Date	Reference	Message
10/16/2014	00006-Menken-Real Estate	<p><b>From:</b> Don Draper</p> <p><b>To:</b> Rachel Menken</p> <p><b>Subject:</b> Meeting Confirmation</p> <p>Dear Rachel,</p> <p>The Status Meeting is confirmed for 9:00am on March 12th at Draper Law &lt;<a href="#">(moo)</a>&gt;</p>

## FAQ

**What happens to documents attached to an email?** They are now found in the documents tab of that matter. There is a 25MB per email limit.

**Do I have to go to the Communications tab each time to get the "special" email address?** No, you can click on the vCard option while you are looking at the address and save it for future use.

**If the maildrop address was revealed accidentally to others, could they forward emails to Clio?** No, Clio is designed to only recognize your own user login email and will prevent others from using the email maildrop address to link files and information to Matters.

**I do use different email addresses other than the Clio email login. How can I ensure those emails get forwarded to Clio without being blocked?** You can set up Email Aliases for the different email addresses that you want to forward emails to Clio from. Each Clio user would need to set up their own email aliases. Click [here](#) to learn more.

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# The New Clio Documents

Clio Training Team  
December 09, 2014 16:28

Clio is proud to start rolling out the long awaited refresh to our native document management system; Clio Docs.

With the new Clio Documents you can:

- Organize your documents using folders
- Download multiple documents at once
- Share documents using temporary links
- Upload folders using Google Chrome

List Documents						
Clio						
All Files > Robin Woods						
Description	Matter	Category	Last Edit	Author	#	
<input type="checkbox"/> Contact Notes			10/14/2014	Roger Sterling		<a href="#">View details</a> <a href="#">Share</a> <a href="#">Edit</a> <a href="#">Download</a> <a href="#">Rename</a> <a href="#">Move</a> <a href="#">Trash</a>
<input type="checkbox"/> 00165-Woods-Custody	00165-Woods-Custody		10/14/2014	Don Draper		<a href="#">View details</a> <a href="#">Share</a> <a href="#">Edit</a> <a href="#">Download</a>
<input type="checkbox"/> 00164-Woods-Divorce	00164-Woods-Divorce		10/14/2014	Don Draper		<a href="#">View details</a> <a href="#">Share</a> <a href="#">Edit</a> <a href="#">Download</a>

While the new Clio Docs will be released gradually over the next month, if you want access to the new Clio documents sooner you can request an invitation in [Settings > Account and Payment Info](#). Please note that the new Clio Docs is only available if you are using Clio Next, as well.

All of our Support documentation has been updated to reflect the changes to Clio Docs, but if you are still using the older version of Clio Docs, please feel free to contact our Support team to request our archived resources on that version.

All of our articles on Documents can be found [here](#). Additionally, we hosted a special webinar to preview the new Clio Docs, which you can view a recording of at your leisure [here](#).



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25:07



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Was this article helpful?   2 out of 2 found this helpful



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# Matters 101 Video

Clio Training Team  
November 24, 2014 14:32

This Video Covers:

- Viewing Matters
- Sorting/Searching Matters
- Overview of tabs and information within a Matter
- Creating a Matter



08:46



HD

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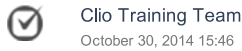
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# How do I create and assign Tasks?



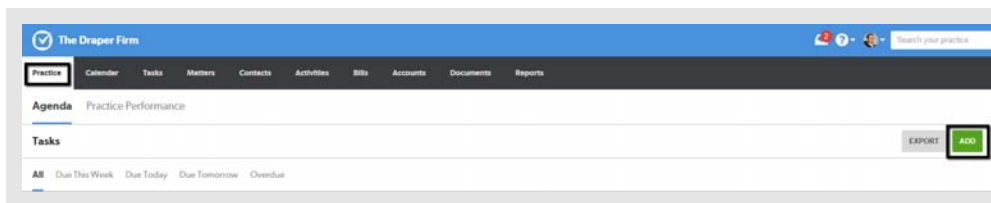
For steps on creating and assigning Task Lists and Templates, see the following articles:

[Creating and Managing Task List Templates](#)
[Assigning Task Lists](#)
[Understanding Task Dependencies](#)
[Updated Tasks Webinar Recording](#)

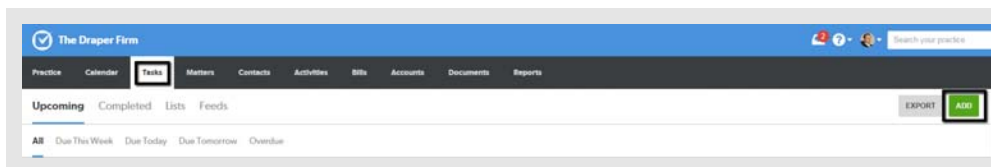
There are several places within Clio where you can add an individual Task by clicking the "Add" button:

- From the Practice screen
- From the Tasks tab
- From the Tasks sub-tab of any Matter

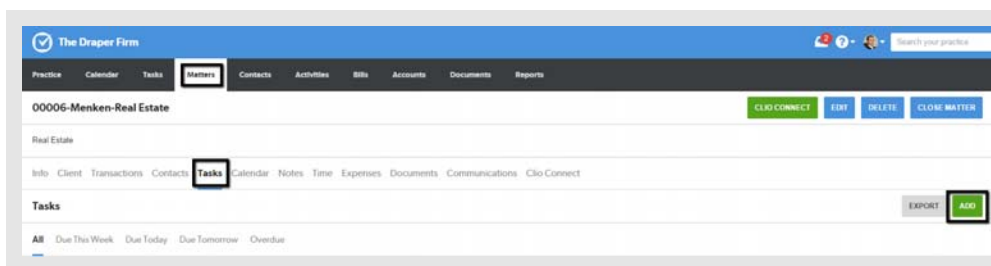
## The Practice Screen



## Tasks Tab



## Tasks Sub-tab within a Matter



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## Add Task Form

- Task Name:** Specify what the Task is called or what is entailed (Mandatory field)
- Description:** A large area to write more complete details of the Task (Optional field)
- Assignee:** This is the user that the Task will be assigned to.  
Clicking on "Firm User" and selecting "Contacts" will allow you to assign the Task to a Contact through Clio Connect.
- Permissions (Lock Icon):** Tasks can be "Public" which are shared firm wide, or "Private" - which are only viewable by Assignee and Account Admins.
- Priority:** You can indicate whether the Task is a High, Medium, or Low Priority.
- Matter:** Start typing the matter number or client name and then choose the appropriate Matter from the dropdown.
- Add a Reminder:** Add an Email or Popup [Task Reminder](#) if desired.
- Due at/Due in:** Select a date due by clicking in this field.  
If you specify a Matter that has Tasks already assigned, the "Due in" option will become available. Clicking the "Due in" option will allow you to set a due date in relation to other Tasks.  
For more information, see [Understanding Task Dependencies](#)
- Save Buttons:** When you have updated all fields, click the "Save Task" button to save and close the window or click "Save & Add Another" to create a new Task for the currently specified Matter.

**Add Task** [Close]

Task Name required Due at  Due in  8

Complete conflict check 1 09/12/2014

Description 2

To be completed before meeting with client.

Assignee 3 required 4 Priority 5

Firm User Don Draper Normal

Matter 6

00006-Menken-Real Estate

[Add A Reminder](#) 7

[Save Task](#) [Save & Add Another](#) or [Cancel](#) 9

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# How do I edit or delete a Task?

Clio Training Team  
October 30, 2014 15:47

To edit a Task, you will see the "Edit" link found underneath the Task:

The screenshot shows the Clio Tasks interface. At the top, there are navigation tabs: Practice, Calendar, **Tasks**, Matters, Contacts, Activities, Bills, Accounts, Documents, and Reports. Below these are sub-tabs: Upcoming, Completed, Lists, and Feeds. There are 'EXPORT' and 'ADD' buttons. A filter dropdown is set to 'All'. Below the filter are options: 'Due This Week', 'Due Today', 'Due Tomorrow', and 'Overdue'. A 'Select All' checkbox is present. The main table has columns: Date, Task, Reference, and Description. One task is listed under the 'Overdue' section: Date: 10/02/2014, Task: Have conversation with client Assigned to Me by Peggy Olson, Reference: 00156-Simpson-MVA, Description: Get updates. Underneath this task, the 'Edit' link is highlighted with a red box.

Then make your changes and 'Save Task'.

To delete a Task, you can either delete an individual task or use the NEW Bulk Actions\* feature to delete Tasks in bulk.

1. For an individual task, choose the "Delete" option underneath the Task:

This screenshot is identical to the previous one, but the 'Delete' link underneath the task is highlighted with a red box.

2. For multiple tasks to be deleted: Select the specific Tasks via the checkboxes or choose ALL, then select the 'Delete' Action, and click 'Apply'.

**\*Please note that only Administrators will have permissions to delete bulk entries across the various areas of Clio. Non-Administrators will not have a view for the Bulk Delete option.**

This is a partial screenshot showing the top part of the Clio Tasks interface, including the navigation tabs and the filter dropdown.

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Date	Task	Reference	Description
<b>Overdue</b>			
<input checked="" type="checkbox"/>	10/02/2014 Have conversation with client Assigned to Me by <a href="#">Peggy Olson</a>	<a href="#">00156-Simpson-MVA</a>	Get updates
	<a href="#">Edit</a> <a href="#">Add Time</a> <a href="#">Mark as Complete</a> <a href="#">Print</a> <a href="#">Delete</a>		
<input checked="" type="checkbox"/>	10/06/2014 Prepare for court date	<a href="#">00076-Watson-Watson v. Small</a>	
	<a href="#">Edit</a> <a href="#">Add Time</a> <a href="#">Mark as Complete</a> <a href="#">Print</a> <a href="#">Delete</a>		
<b>Upcoming</b>			
<input checked="" type="checkbox"/>	11/05/2016 7.5 years	<a href="#">00122-Shortreed-Shortreed v. Philippe</a>	
	<a href="#">Edit</a> <a href="#">Add Time</a> <a href="#">Mark as Complete</a> <a href="#">Print</a> <a href="#">Delete</a>		

**Warning - deleting a task is a permanent action.**

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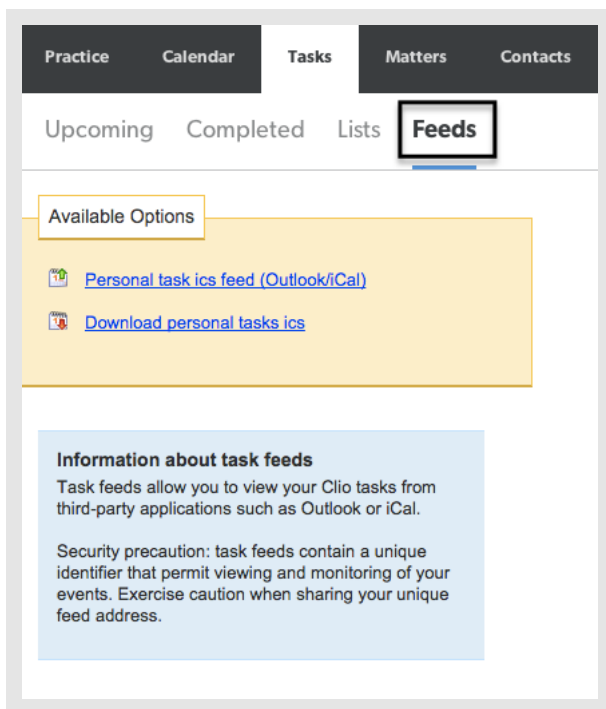
Clio Support > General > Tasks

# How do I set up a Task Feed?

Clio Training Team  
October 28, 2014 13:13

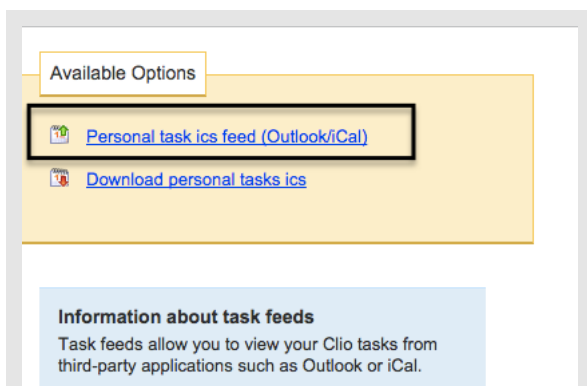
A Task feed is a one-way push of your Tasks to an external calendaring application like Google or Apple iCal. If you are an Outlook user you can bi-directionally sync your tasks to Outlook. For more information on Clio Sync for Outlook, click [here](#).

To set up the Task Feed, go to "Tasks" and then "Feeds". Here you will see the task feed link:



## iCal Users

If you use iCal (or Outlook and want to do feed) then simply click on the link with the green arrow:



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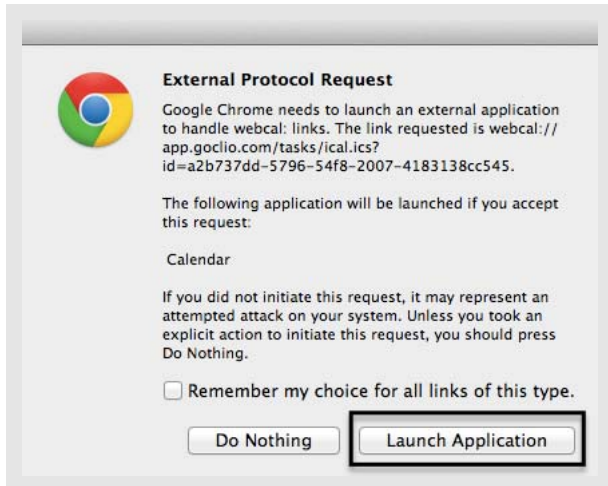
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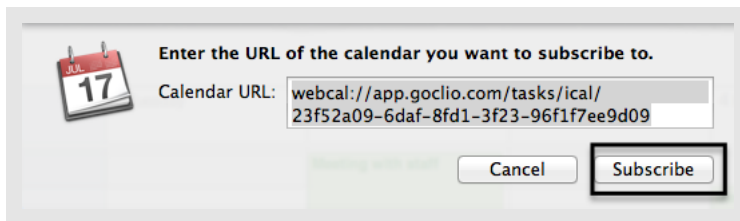
Calls coming in outside of these hours are handled on a best efforts basis.

Security precaution: task feeds contain a unique identifier that permit viewing and monitoring of your events. Exercise caution when sharing your unique feed address.

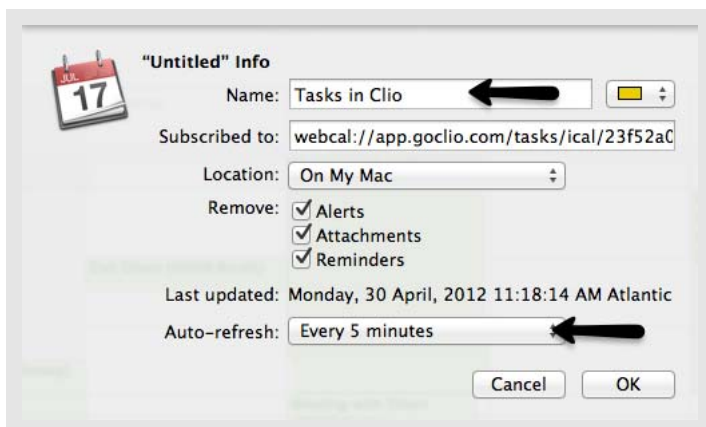
When you click on the link you will see a pop up that looks like this - depending on your browser:



Once you click on "Launch Application" you will see a confirmation window from iCal. Click on Subscribe:



Name your feed in iCal:



Now you will see the Task Feed:

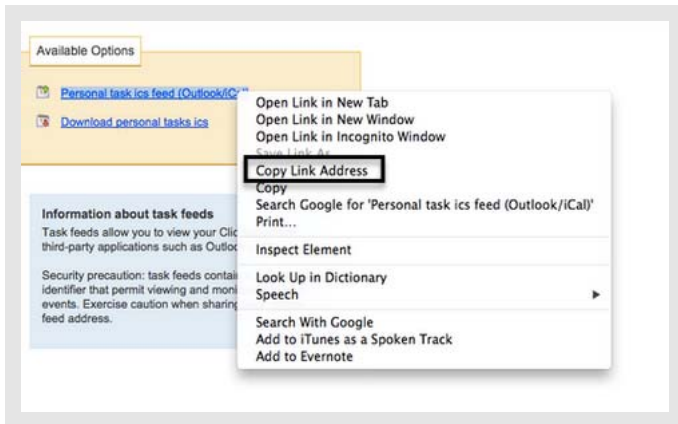




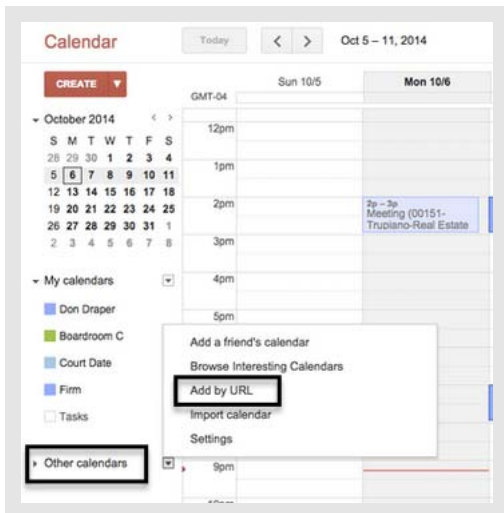


### Google Users

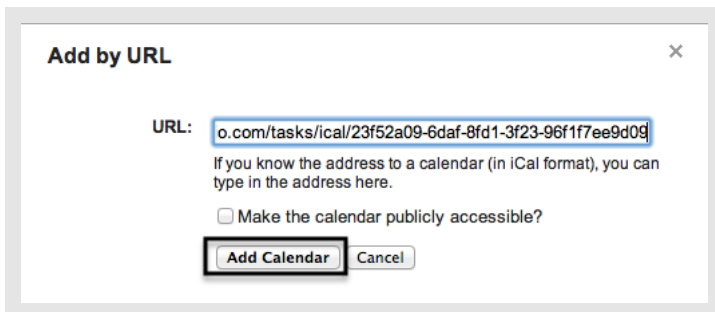
Right click on the link with the green arrow and copy the link address:



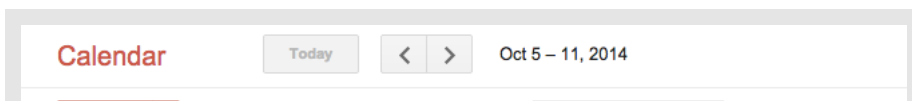
Next, go to Google and in your calendar under "Other Calendars" click on the dropdown arrow next to "Add" and choose "Add by URL".

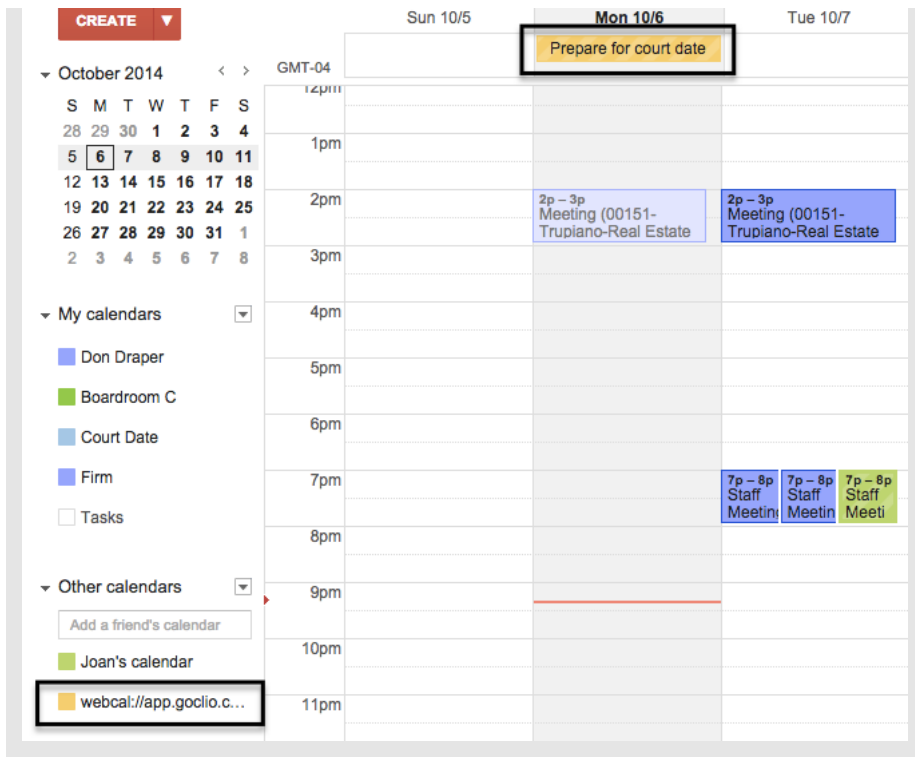


Now, paste in that link address you copied from Clio and click on "Add Calendar":



It can take some time for the initial feed to be set up, but when it is you will see the Task feed noted in Google:





Once you have the Task Feed set up in Google you can rename the Feed so that you can easily identify it in your list using the Google Settings.

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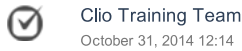
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# How do I create a Time Entry?

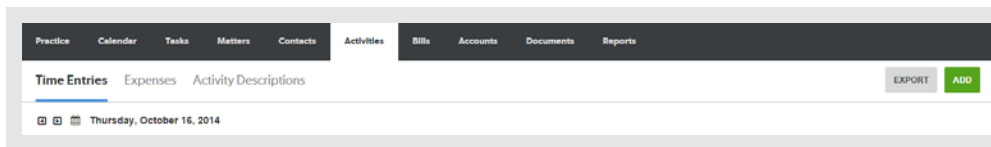


Clio Training Team  
October 31, 2014 12:14

Before you create a Time Entry, you may want to review the resources for setting your User Default Rate, Client rates, Matter rates and Activity Descriptions [here](#).

## From Activities Tab

Go to the Activities tab and the first sub-tab is "Time Entries". These are time entries across all of your matters. To add a new one, click on "Add":



1. Date: Change the date, if applicable.
2. Matter: Enter in the Matter by starting to type the name or number. Then choose the matter from the drop down menu.
3. User: Determine the user. Click "me" to enter time for yourself, or choose another user's name if you wish to enter time on their behalf.
4. Description: Choose the Activity Description or choose the "No Description" at the very top if you do not wish to use one.
5. If you have selected a UTBMS Code under the Activity Description, you can select a Task Code for it as well.
6. Duration: Enter in the duration
7. Rate: If you have chosen the Activity Description the associated rate will pop up automatically. If you want to change the rate, enter it here
8. Note: Enter in any notes about your activities you wish to show on the bill
9. Then, click "Save Time Entry".

**Time Entry Form** [X]

Date **1**: 10/16/2014

Matter **2**: Type a matter number...

User **3**: Me

Activity description **4**: (no description)

Task **5**: (no task)

Duration **6**: Format: 1h 10m, 1:10, 70min

Rate **7**: 295.00 [D] /hr [Start timer?]

Note **8**: [Text area]

**Save Time Entry** or [Cancel](#)

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- [Getting Started: Setting up your User Client and Matter Rates](#)
- [Using Timers in Clio](#)
- [Creating and Sharing Activity Descriptions](#)
- [How do I create a bill?](#)

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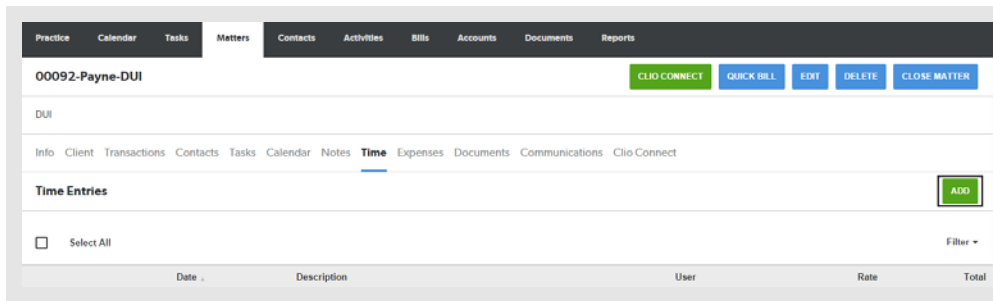
0100 hrs GMT).

Calls coming in outside of these hours

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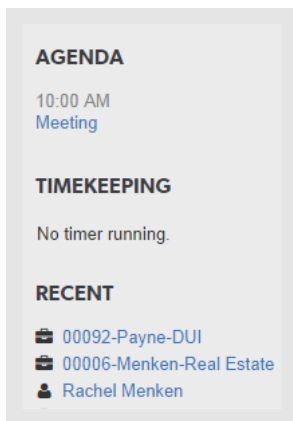
## From Matters Tab

You can also enter in time entries on a matter card. To do so, go to the matter in Clio and click on the "Time" tab. From there you follow the same instructions as above.

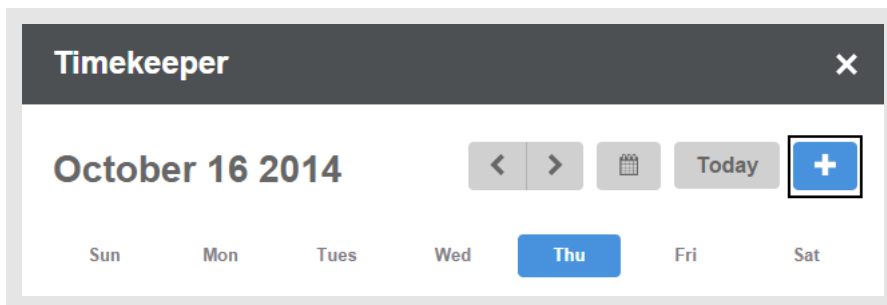


## Using the Timekeeper

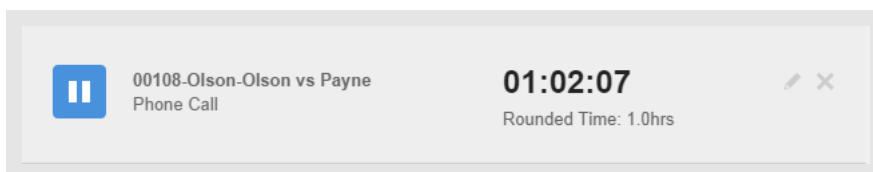
The "quick-start" timer is easily accessed via the Timekeeping area in your right hand toolbar as seen below:



To create a new time entry, simply click the "+" symbol (highlighted below) to automatically start a running timer:



Once the timer is running, you can click on the edit icon (highlighted below) to edit the details of the entry, including setting the matter association, date, description and billable rate.



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## Using Timers in Clio

Clio Training Team  
November 03, 2014 15:05

You can find timers in many different places in Clio, all in an effort to help you capture your time effectively.

\*\*Please note that you cannot use a timer on behalf of another user. Also, if a time entry has been billed then it is frozen and you cannot use the timer unless the bill is deleted \*\*

### From the Activities Screen

Go to "Activities" and then "Time Entries". You will see on the left side the timers you can activate:

Time Entries							EXPORTE	ADD
Tuesday, October 21, 2014								
<input type="checkbox"/>	Select All						Filter	
	Date	Matter	Description	User	Rate	Total		
<input type="checkbox"/>	10/21/2014	<a href="#">00173-Smith-Property Sale</a>	Phone Call	<a href="#">Pete Campbell</a>	\$310.00	\$186.00		
				0.60				
							Start Timer	Edit Delete
<input type="checkbox"/>	10/17/2014	<a href="#">00169-Payne-Property Sale</a>	Admin - Document Filing	<a href="#">Pete Campbell</a>	\$0.00	\$0.00		
				2.40				
							Start Timer	Edit Delete
<input type="checkbox"/>	-	<a href="#">00169-Payne-Property Sale</a>	Contingency Fee	<a href="#">Pete Campbell</a>	\$5,000.00	\$5,000.00		
				1.00				
							Edit	Delete

### From a new Time Entry

When you create a Time Entry you can click on the box "Start Timer?". This will automatically start a timer:

**Time Entry Form**
✕

Date

Matter

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**User**  
 Me

**Activity description**  
 Phone Call (275.00/hr)

**Duration**  
 Format: 1h 10m, 1:10, 70min

**Rate**  
 275.00 /hr

Start timer?

**Note**

**Save Time Entry** or Cancel

- For more information on creating a time entry, click [here](#).

**From within a Matter**

Go to a Matter and then click on the "Time" sub-tab. Here you will see time entries related to that specific matter as well as timers that you can activate:

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

**Time Entries** ADD

Select All Filter ▾

	Date	Description	User	Rate	Total
<input type="checkbox"/>	10/21/2014	Personal Injury	Pete Campbell	\$300.00	\$600.00
			2.00		
<input type="checkbox"/>	10/21/2014	Communications	Pete Campbell	\$300.00	\$450.00
			1.50		

**From the Right-Hand Tool Bar**

As you enter in time entries through the day, you will see that in the right-hand toolbar those time entries appear under "Timekeeping". You can activate the timers from here:

October 2014

SU	MO	TU	WE	TH	FR	SA
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

**AGENDA**

10:00 AM Meeting

**TIMEKEEPING**

No timer running. ←

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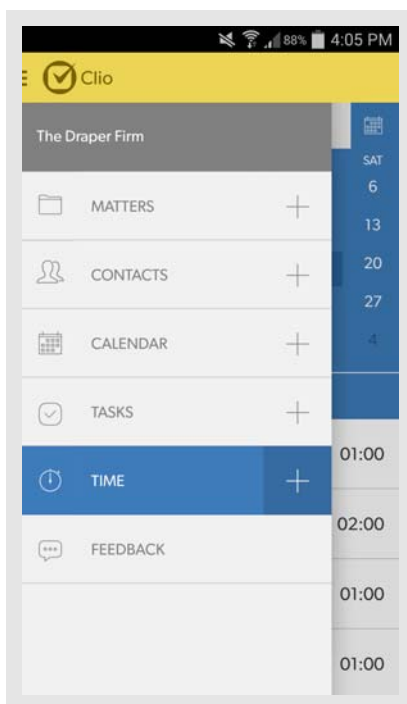



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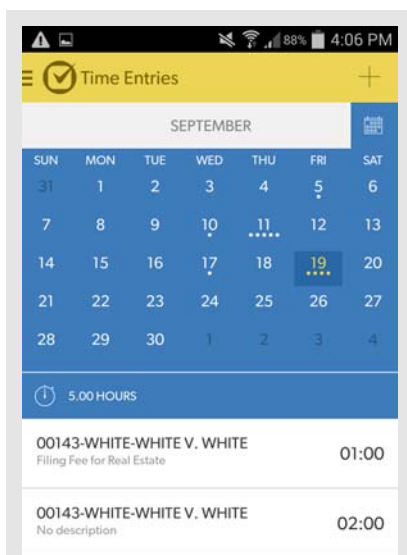

# Android App: Timekeeping

Clio Training Team  
October 30, 2014 18:11

To access your Clio Time Entries, either tap on the menu icon at the top of your screen (three horizontal bars) or swipe from left to right to access the menu:



You will see a list of your Time Entries for the current day in calendar view:



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We're available Monday to Friday (from 0000 hrs to 1700 hrs PT (0800 0100 hrs GMT)).

Calls coming in outside of these hours will be handled on a best efforts basis.

00143-WHITE-WHITE V. WHITE No description	01:00
00143-WHITE-WHITE V. WHITE No description	01:00

From here you can tap on the calendar for the day you want to view entries for. You will notice dots at the bottom of each date. This is a visual indicator of how many time entries have been recorded on that given day. The maximum number of dots is five:

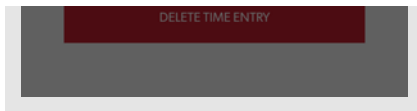
### Editing a Time Entry

To edit a Time Entry, tap to open the entry on your screen and make your changes. You can show additional fields by selecting the “Choose Optional Fields” link at the bottom of your screen:

When you have finished making your changes, tap the save icon at the top of your screen.

### Deleting a Time Entry

While in the Edit screen you can delete a Time Entry by tapping on the “Delete Time Entry” button at the bottom of the screen:



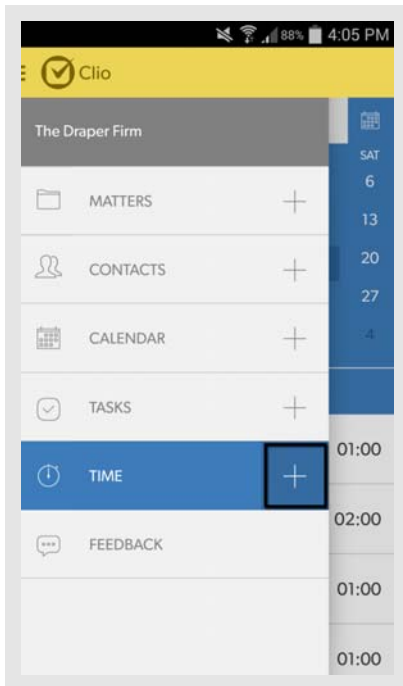
Please note that a Deletion is a permanent action. You may be able to recover the Task via the Recover Bin in the desktop application.

### Creating a Time Entry

It is quick and easy to add a Time Entry in Clio's Android App and you can do so three different ways:

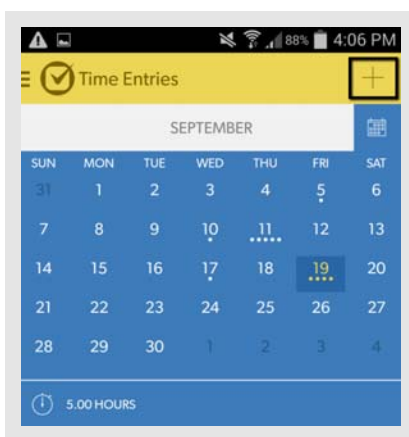
#### Menu Quick Add

When you are viewing the Menu, tap on the "+" icon to the right:



#### Time Entries Screen

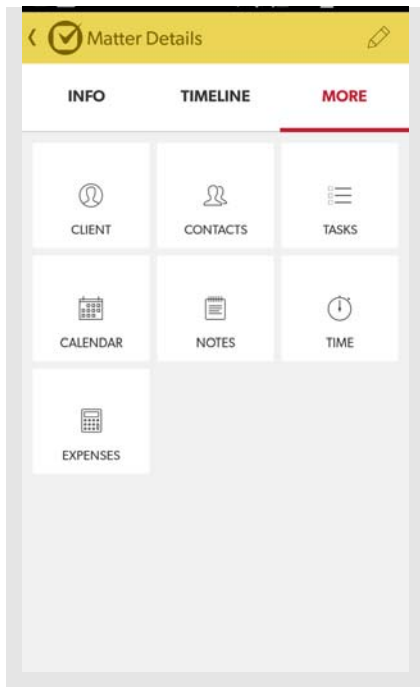
When viewing the Time Entries area of the Android App, tap on the "+" icon at the top of the screen:



#### Within a Matter

When you have a Matter open on your screen, tap on the "More" link at the top. Here you can select the Time option. Then choose the "+" icon at the top of the screen. When you create a Time Entry using this method, the Matter is filled in for you.





*If have any questions, comments, or concerns about Clio don't hesitate to contact us via our [feedback form](#), by email at [support@goclio.com](mailto:support@goclio.com) or by phone at 1-888-858-CLIO(2546).*

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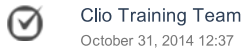
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### Comments

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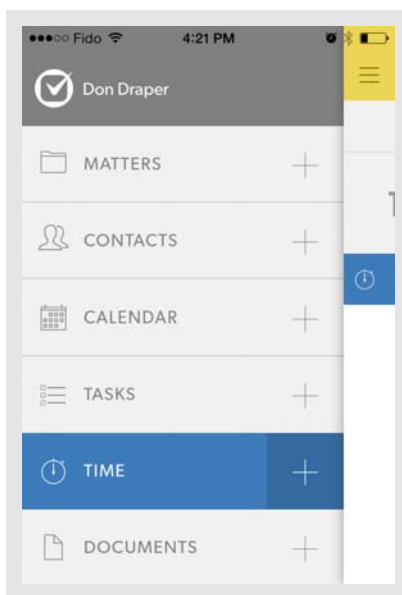

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# iPhone App: Timekeeping

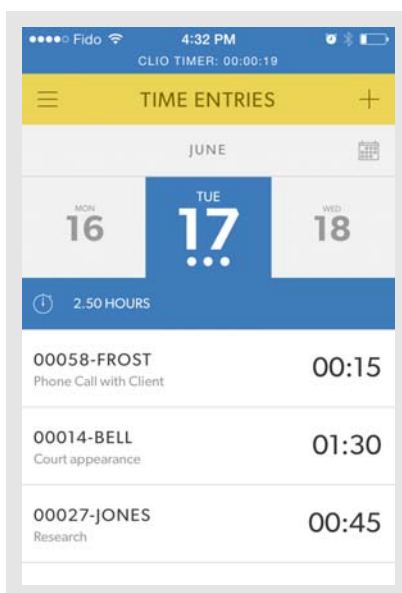


Clio Training Team  
October 31, 2014 12:37

To access your Clio Time Entries, either tap on the menu icon at the top of your screen (three horizontal bars) or swipe from left to right to access the menu:



You will see a list of your Time Entries for the given day:



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Clio provides customers with unlimited free technical support. Feel free to contact us by:

Creating a [support ticket](#)

Sending an email to [support@goclio.com](mailto:support@goclio.com)

Calling us:

**North America / Global HQ:**

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1 604 210 2944

**EMEA HQ:**

Ireland:

+353.2.1601.9279

UK Freephone:

+44.800.433.2546

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Tweeting: [@goclio](#)

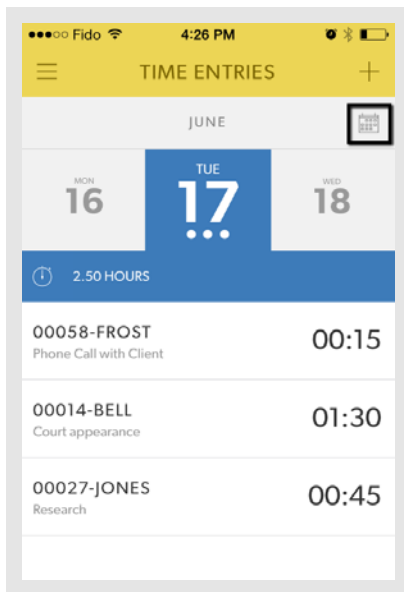
**Support Hours:**

We're available Monday to Friday (from 0000 hrs to 1700 hrs PT (0800 1000 hrs GMT)).

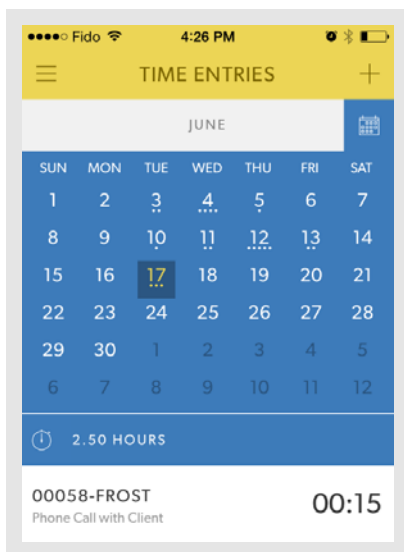
Calls coming in outside of these hours will be handled on a best efforts basis.

## Viewing Time Entries in Month View

You are able to see a calendar view of a month and then choose the date you want to view the Time Entries for. To do so, click on the Calendar icon when you are viewing your Time Entries:



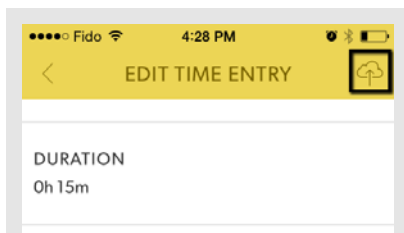
From here you can tap on the day you want to view the entries for. You will notice circles at the bottom of each date. This is a visual indicator of how many time entries have been recorded on that given day. The maximum number of circles is five:



To exit the month view, click on the calendar icon once more.

## Editing a Time Entry

To edit a Time Entry, tap to open the entry on your screen and make your changes. You can show additional fields by selecting the "Choose Optional Fields" link at the bottom of your screen:



RATE  
250

DESCRIPTION  
Phone Call with Client

+ CHOOSE OPTIONAL FIELDS

When you have finished making your changes, tap the save icon at the top of your screen.

## Deleting a Time Entry

While in the Edit screen you can delete a Time Entry by tapping on the “Delete Time Entry” button at the bottom of the screen:

EDIT TIME ENTRY

DURATION  
0h 15m

RA  
25

DE  
Phone Call with Client

+ CHOOSE OPTIONAL FIELDS

DELETE TIME ENTRY

Are you sure you want to delete this Time Entry?

Cancel Yes

Please note that a Deletion is a permanent action. You may be able to recover the Task via the Recover Bin in the desktop application.

## Creating a Time Entry

It is quick and easy to add a Time Entry in Clio's iOS App and you can do so three different ways:

### Menu Quick Add

When you are viewing the Menu, tap on the “+” icon to the right:

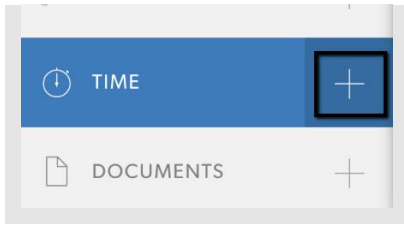
Don Draper

MATTERS +

CONTACTS +

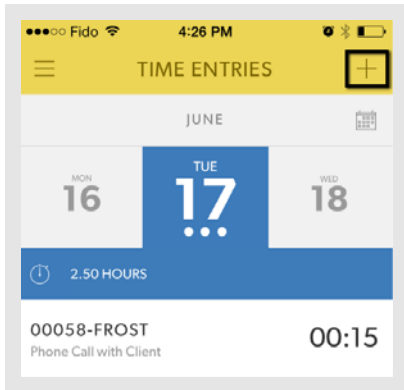
CALENDAR +

TASKS +



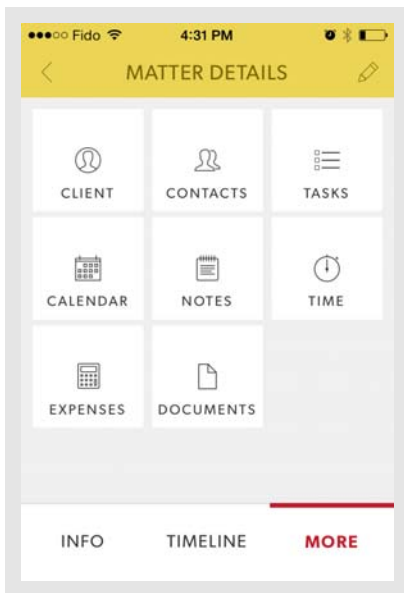
**Menu->Time Entry**

When viewing the Time Entry area of the iOS App, tap on the “+” icon at the top of the screen:



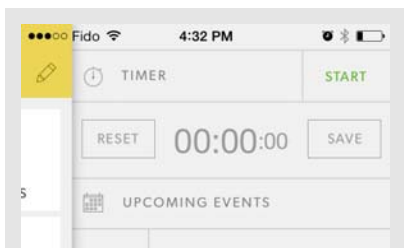
**Within a Matter**

When you have a Matter open on your screen, tap on the “More” link at the bottom. Here you can select the Time option. Then choose the “+” icon at the top of the screen. When you create a Time Entry using this method, the Matter is filled in for you.

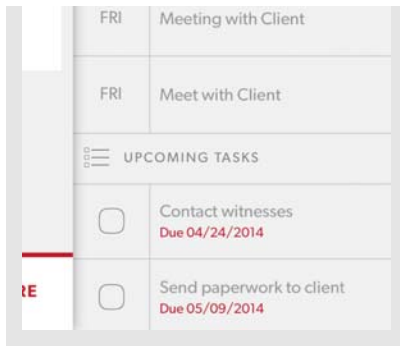


**Using the Timer**

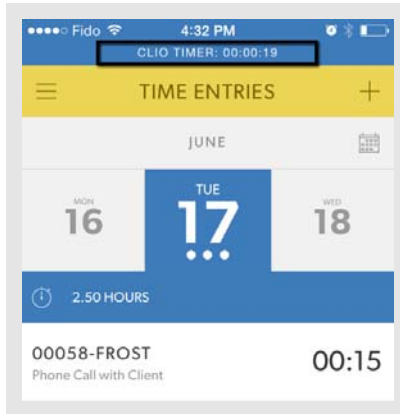
When you access the Dashboard by swiping right to left on your screen, you will see the timer option at the top:



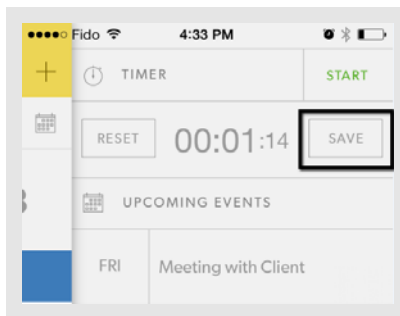




To start the timer, simply click on “Start”. As your timer is running and you move through the Clio App, you will see the time that has been recorded thus far at the top of your screen:



To stop the timer, simply click on “Stop” in the Dashboard. Once you do so, you will see the time that was captured. To turn this into a Time Entry, click on “Save”:



To reset the timer to start a new one, click on “Reset”. This will reset the timer back to 00:00.

### Using UTBMS Codes

You can add UTBMS codes when adding or editing Time entry. For complete instructions, see the [UTBMS Support article](#).

*If have any questions, comments, or concerns about Clio don't hesitate to contact us via our [feedback form](#), by email at [support@goclio.com](mailto:support@goclio.com) or by phone at 1-888-858-CLIO(2546).*

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