New Ways to Record Payments in Clio

What are we releasing?

We are making it easier to accept client payments within Clio by making the way you apply payments to an invoice clear, easier to do, and possible in fewer clicks.

What is new to payments in Clio?

We've streamlined the process and improved the experience of handling, applying, and requesting payment for legal services in Clio.
This update lets you easily understand payment information and makes handling payments in Clio simpler and more straightforward. You can now:

- Take bulk actions, such as applying a payment to multiple invoices.

- Apply amounts from Trust and Operating accounts to invoices with fewer clicks and more confidence.

- Alternate between different methods of payment with ease; from direct deposit to credit card payments.

- Quickly identify client funds available and outstanding amounts to be paid.

Does this impact my ability to accept credit cards and online payments in Clio?

This keeps payment options such as paying via Clio Payments top-of-mind for firms looking to improve their billing process and streamline their return of payment. Online payments are intuitively integrated into Clio billing and payments processes, making it easy to see why lawyers using Clio Payments get paid 11 days faster than those using traditional means of payment.

What is different from the current payment process in Clio?

This update will reduce the number of steps needed to apply a payment to an invoice, improving accuracy and peace-of-mind when billing clients, and letting you deal with client funds quickly and confidently.

- Design improvements have focused on accessing more information, with less effort.

- Space is optimized to ensure less scrolling and easier consumption of information in the main Transactions view.

- Required information is accessible at the click of the button. All within this page, you're able to see payment details, amounts held in trust, status of current bills, and more.

What if I am on a Starter, Loyalty, or Legacy pricing plan?

If you are on a Starter, Loyalty, or Legacy plan, you do not have the ability to accept integrated credit card payments. You can, however, access this feature by contacting our upgrades team, or upgrading your plan right from Clio. Learn more about Clio Payments.

What if I want to apply a single payment to multiple bills at once? [Bulk payments]

Simply click the "Record Payment" button. You will be prompted to enter a Client and will then receive a list of all invoices with an outstanding balance which you can pay in bulk.

Will this payment be reflected in my accounting integration?

Yes. All payments recorded in Clio will sync over to QuickBooks Online or Xero in same manner as they currently do.

How can I view existing funds available when deciding what payments to apply to a bill?

Once you click the "Record Payment" button and type in a Client name, a list of all available funds the client has to be applied will appear. Funds are broken down by bank account, and also by Client and Matter.

What if I don't currently have access to Clio Payments?

Everyone will have access to the new streamlined payments process, but you may not have access to Clio Payments online credit card processing. As Clio Payments is not currently available for customers outside of the United States, you will be unable to record credit card payments via Clio Payments at this time. If you are in North America and on a Starter, Legacy, or Loyalty plan, please contact our Sales team to upgrade and access this feature.

What if I currently use PayPal or LawPay2.0 to accept credit cards?

You will still be able to record payments using PayPal or LawPay2.0 through Clio Connect, as is currently possible.

What are the benefits of using Clio Payments over other methods of payment?

- Get paid faster. Lawyers who use Clio Payments report receiving payments 11 days faster than lawyers who request payment via check or cash.

- Simplify your payment process. No manual work is necessary and no data entry is required; client funds and payment history are recorded with ease.

- Security and peace of mind. Clio Payments is powered by LawPay, the legal industry's most trusted credit card processor.

- Save money. Clio Payments credit card processing rates are industry-low.[1]

Is this available to all Clio users?

Yes, this updated view will be available to all Clio users, with default Clio Billing permissions.

Where can I learn more about this update?

- Clio **Support site**
- New Clio Experience **landing page**

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1. 1.95% + 20¢ per transaction on all major credit cards, and 2.95% + 20¢ on Amex and specialty cards.