

Clio® The Improved Way to Share Bills in Clio

What are we releasing?

Billing can be a tedious administrative task for legal professionals—but it doesn't have to be. We've made every element of billing with Clio more efficient, so you can get your billing done in fewer clicks with greater ease.

You can now take bulk actions while maintaining personal communication with your clients with Clio's improved efficiencies when sharing invoices. You can now add payment instructions or a simple greeting to the email notification alerting a client that a single, or collection of, bills has been shared with them.

How efficient is this new and improved way of sharing bills with clients?

The total invoicing process for most firms¹ can now to be completed in a number of hours. For current Clio users, this new way of invoicing clients can speed up this task by an average of 4 clicks per bill sent².

How does this impact existing billing workflows in Clio?

Currently, invoices must be shared one-by-one with clients. The new ability to share multiple invoices at once means you'll experience a significant decrease in bill processing time, and hopefully, an increased return of payment time as a result.

How does this update improve return of payment in Clio?

Return of payment is always a concern for law firms, and this update allows for the timely sharing of bills once a case is closed or fee discussed, ensuring that payment of bills remains top of mind for your client. This also allows lawyers to reduce their end-of-month billing process by hours, if not days, and ensure that it coincides with payday for clients when possible.

How do I access this feature?

All users with billing permissions will be able to access Clio's new Bill Sharing feature. Bills can be shared in bulk by selecting multiple invoices in the table and clicking "Share".

Can I continue to export and finalize the sharing of my invoices with clients?

Yes. In addition to sharing invoices in bulk, you can also export invoices in bulk. You choose if you'd like to share via email, Clio Connect, or simply print them.

Is this available to all Clio users?

Yes, this will be made available to all Clio users.



Where can I learn more about this update?

- [Clio Support site](#)
- [New Clio Experience Landing Page](#)

1. Using a data point of an average end-of-month billing cycle processing 50 invoices.

2. Calculated by assessing the typical Clio billing workflow. Clicks saved include: selecting bill, setting message, adding user, and clicking "share".