New Ways to Manage Transactions in Clio

What are we releasing?

Clio has improved the look and feel of our Transactions page—making it easier to manage client transactions between Matters and Accounts. This update makes it easier to manage transactions between different states of payments and between different accounts, including the handling of funds in Trust and Operating accounts.

What is new to Transactions in Clio?

We're introducing a more user-friendly layout to make it easier and faster to navigate. The new and improved look of the Transactions page matches the overall improvements you'll see throughout Clio's latest evolution.

It's now easier to find what you need, understand the information presented, and complete your Transaction tasks.

What if I'm familiar with the current Transaction process in Clio?

If you're already familiar with Transactions in Clio, this update will provide an even better experience for you by giving you:

- Access to more information, with less effort. Space is optimized to ensure less scrolling and easier consumption of information in the main Transactions view.
- More visibility into how you handle Transactions in Clio with powerful, sortable, new data tables.
- Easy access to the details you care about by customizing how information is displayed.

Will this change interrupt Transactions I have in progress?

This update will not disrupt existing workflows in Clio, but will simply allow for Transactions to take place with additional ease. You'll now be able to customize both the Transactions page view and the columns of information displayed.

Is this available to all Clio users?

Yes, this updated view will be available to all Clio users.

How can I access this feature?

This feature is available from the Accounts tab in Clio.

Where can I learn more about this update?

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