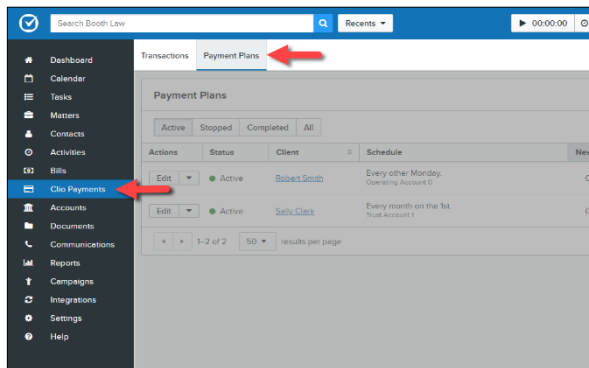


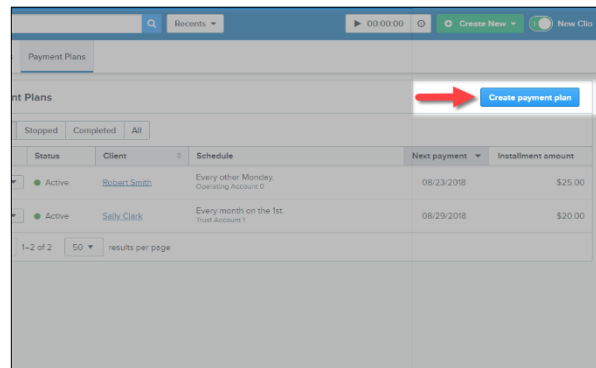
How do I set up a Payment Plan to pay trust funds?

Before you start: ensure that Clio Payments has been set up.



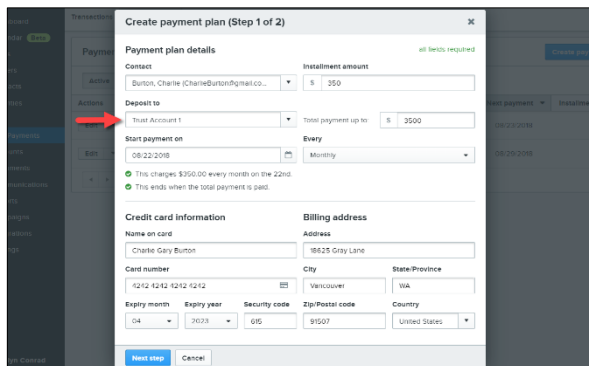
STEP 1

Go to the main **Bills** page and then click on the **Billable Clients** tab.



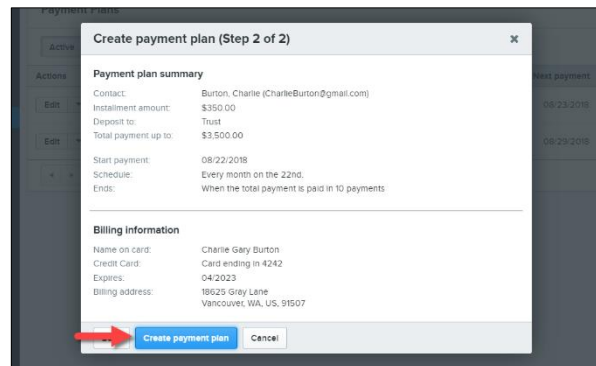
STEP 2

Click the **Create payment plan** button.



STEP 3

Record the **plan details**, select a **trust account**, enter the client **credit card** details, and click **Next step**.



STEP 4

Review the plan and billing details for correctness and click **Create payment plan**.



Need more detail? Watch the [Creating a Payment Plan](#) video.

