

What is Clio's Secure Payment Link?

Clio customers can now send a secure payment link to their clients that will allow them to pay off an invoice or make a deposit into trust, from anywhere, at any time. A secure payment link sends clients to a firm-branded payments page—that Clio customers can opt to host on their website—where clients can make a secure credit card payment via Clio Payments.

Why would I use Clio's Secure Payment Link instead of sharing an invoice?

It's all about speed. Quickly copying a link to send to your clients is extremely frictionless and does not rely on an invoice or trust request being made. It allows you to email, text, or pull up the secure link in-office with ease.

How would I use a secure payments link at my law firm?

Many law firms use secure payment links to take an initial retainer deposit, since it allows them to collect money without the need to generate a trust request in Clio. Additionally, firms commonly put these links on their website embedded in a "pay now" section.

Can I collect deposits into both trust and operating accounts using Clio's Secure Payment Links?

Yes! You can generate a secure payment link for any Clio bank account—trust or operating—connected to a LawPay account.

Who has access to this feature?

The secure payment link is a feature of Clio Payments, which is included in all Boutique and Elite pricing plans for US and Canadian customers. Note that you must also have Clio Payments enabled to access this feature.

What payment methods are supported with secure payment links? Are there fees associated?

The ability to create and share secure payment links to your firm's branded payments page is an extension of Clio Payments. All accepted payment methods and transaction fees are the same. Learn more about them—and how Clio will waive your monthly LawPay subscription fee—at our learning page.

Are payments collected from Clio's secure payment link automatically applied to my clients' invoices?

No. Before a secure link payment can be applied to invoices in Clio, it has to be "linked" via the payments Transactions table in Clio.

Who is notified when a payment is completed via Clio's secure payment link?

As soon as a payment is submitted via the secure payment link, the transaction will appear in the "Clio Payments" section of the application with an "Authorized" status. Once the payment completes (typically in 24 to 48 hours), both your firm and your client will be notified. At this time, you will be prompted to link the payment to a client matter in Clio via the payments Transaction table.

How can I link a secure link payment to a client matter in Clio?

Navigate to the Clio Payments Transactions table, find the transaction, and click "Link". When prompted, select the appropriate client or matter.

What happens when I link a secure link payment to a client or matter?

Clio will automatically apply the linked payment to a selected client or matter. If a matter is not selected, the funds will be associated at the client-level.

What happens if I uncheck the "Apply payment to invoices" box when linking the payment?

The secure link payment will be deposited into the account associated with the shared link. Any selected matter and client details will remain attached to the transaction. You can then apply the linked payment to an invoice in Clio by selecting "Record Payment" from the "Create New" dropdown menu.

What if a payment exceeds the client's outstanding balance?

An overpayment will be deposited into the destination account associated with the secure payment link. Any selected matter and client details will remain attached to the transaction.

Learn more about [overpayments](#).