

# How to collect money with Clio Payments in 5 simple steps



1

## Go to the Bills section in Clio.

Select either one bill, or select multiple bills and share in bulk, and click [Share](#).



2

## Choose your delivery method.

In the [Share](#) item window, choose to share a bill via [email](#) or through the secure [Clio Connect](#) client portal.

- [Email](#): Your client will receive the bill as a PDF attachment with the option to pay their bill by credit card in the body of the email.
- [Clio Connect](#): Your client will receive an email notification to log in to Clio Connect, and pay their bill from within the portal.

If you want to request payment for multiple bills via one email, simply check [Accept payment up to the total of all invoices](#)



3

## Share bill(s).

Add an optional message, and click [Share Bill](#).



4

## Your payment records are updated.

Once a client submits their payment information, your payment records are updated automatically in Clio and reflected in Clio's [Transactions](#) and [Payment Plans](#)'s tables.

Both you and your client will be notified immediately once the transaction is processed, via an automated email.



5

## Get paid.

If the payment is successful, the funds will be deposited directly into your law firm's bank account (operating or trust)<sup>1</sup>.

Transactions are automatically recorded to Clio—simplifying reconciliations and eliminating manual data entry for you. That's it!

<sup>1</sup>Both the client and user will also be notified of unsuccessful payments via email.

[Set-Up Clio Payments Now](#)