Getting started with payments in Clio Manage

Make it easy for your clients to pay you—and for you to get paid.

Clio Manage offers a fast, simple way to collect payments online by providing your clients multiple payment options, including credit, debit, and eCheck. Enabling payments takes only a minute—with instantaneous approval for most firms. Here’s how to get started.

**ACTIVATE ONLINE PAYMENTS**

To get set up, sign in to your Clio Manage account and select Online payments from the left-hand menu. Click Activate Today where you will be promoted to enter the following information:

- Business name, type, email address, phone number, and address
- Employer identification number (if applicable)
- Account and routing numbers for any bank accounts you want to connect to Clio Payments
- Personal information and social security numbers for any owners that have at least 25% ownership in the firm

**ADD CLICK-TO-PAY LINKS**

Give your clients the ability to pay instantaneously by sending a secure link to your firm’s payment portal. To access your firm’s click-to-pay link, select New charge from the Online payments tab, and then click Copy payment link. Paste this link in outgoing communications, add it to your website, and save it to your bookmarks to use as needed.

**SET UP FLEXIBLE PAYMENT PLANS**

Are clients struggling to pay their bills? Use payment plans to break large bills into manageable installments. To create a payment plan, select New Payment Plan from the Online payments tab, and then customize the terms for any given client.