

# Retrievables & Clio

1

Clio user is ready to take legal action to collect an unpaid invoice

The screenshot shows the 'Outstanding Balances' section in Clio. It features a table with columns for Actions, Last sent, Id, Status, Due, Client, Matter(s), Issue date, and Balance. There are five rows of unpaid invoices, each with a 'Send' button and a 'Not sent yet' status. The invoices are for Utopia, Inc., Bowery, Inc., Broadway, LLC, Bowery, Inc., and Company, Inc.

Actions	Last sent	Id	Status	Due	Client	Matter(s)	Issue date	Balance
Send	Not sent yet	5	Unpaid	Due 228 days ago	Utopia, Inc.	00009.Utopia, Inc.	03/01/2023	\$7,504.00
Send	Not sent yet	4	Unpaid	Due 253 days ago	Bowery, Inc.	00004.Bowery, Inc.	20/12/2022	\$9,000.00
Send	Not sent yet	6	Unpaid	Due 338 days ago	Broadway, LLC	00007.Broadway, LLC	26/09/2022	\$14,250.00
Send	Not sent yet	7	Unpaid	Due 342 days ago	Bowery, Inc.	00004.Bowery, Inc.	22/09/2022	\$8,442.00
Send	Not sent yet	8	Unpaid	Due 700 days ago	Company, Inc.	00011.Company, Inc.	29/09/2021	\$38,750.00

2

Clio user connects their account to Retrievables

The screenshot shows the 'Third party application Retrievables would like to connect with your Clio account:' screen. It includes a green icon of a magnifying glass over a bar chart, the Retrievables logo, and a list of permissions: Billing, General, Payments, Users, Contacts, Matters, and Settings. There are 'ALLOW ACCESS' and 'DENY ACCESS' buttons. Below the buttons, there is a note: 'Read gives access but does not allow the application to edit. Write allows the application to edit selected information. You may review and edit permissions to any application at any time from your Settings page.'

3

Retrievables receives unpaid invoices

The screenshot shows the 'Accounts' page in Retrievables. It has a table with columns for Debtor name, Amount, Days past due, State, and Comment. There are two rows of unpaid invoices, one for Utopia, Inc. and one for Bowery, Inc. Both have a 'Pending' status and a 'Submit Invoice' button.

Debtor name	Amount	Days past due	State	Comment	Status
Utopia, Inc. Submitted	\$7,504	239	NY	The client refuses to pay for Terms and Conditions prepared by our firm.	Pending
Bowery, Inc. Submitted	\$9,000	253	CA	Legal services were rendered and accepted. Client has been unresponsive.	Pending

4

Retrievables connects Clio user to the most suitable collection law firm

The screenshot shows the 'Accounts' page in Retrievables. It has a table with columns for Debtor name, Amount, Days past due, State, and Comment. There are three rows of accounts. The first two rows (Company, Inc. and Bowery, Inc.) have a 'Connected' status and a 'Choose prior attorney' button. The third row (Broadway, LLC) has a 'Pending' status and a 'Submit Invoice' button.

Debtor name	Amount	Days past due	State	Comment	Status
Company, Inc. Accepted	\$38,750	700	NY	Legal services were rendered and accepted. Client has been unresponsive.	Connected
Bowery, Inc. Accepted	\$8,442	342	CA	The client refuses to pay for Terms and Conditions prepared by our firm.	Connected
Broadway, LLC. Submitted	\$14,250	338	CA	Legal services were rendered and accepted. Client has been unresponsive.	Pending