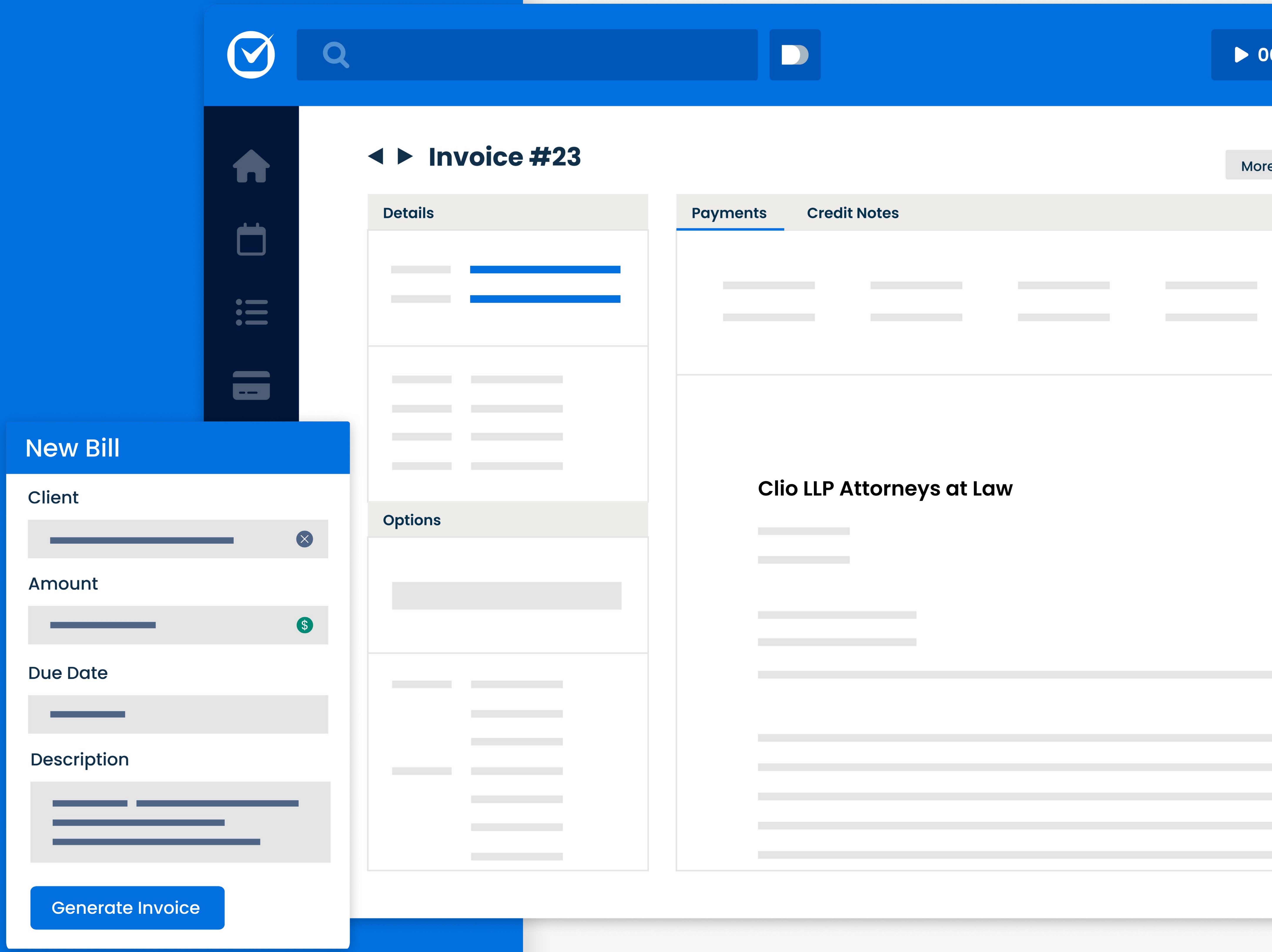
Clio

Get Started

Bill and Get Paid



Congratulations on finishing your Billing and Payments training session!

This session covered how to set up your accounts in your Clio Manage account, including recording a trust transaction, approving and sending a bill, and how to get paid using multiple payment methods.

Your next steps are to practice these action items in your Clio account prior to your next session.

- [ ] Create your Operating and Trust Account
- [ ] Create a Payment Profile
- [ ] Generate your Bill Themes
- [ ] Complete your Clio Payments set up

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Take some time before your next training session to complete the tasks on the previous page, and use the links embedded to help you through each task if needed. As always, if you have any questions, please reach out to our Support team.