



Get Started

Bill and Get Paid

New Bill

Client

Amount

Due Date

Description

[Generate Invoice](#)

The screenshot displays the Clio web interface. At the top, there is a navigation bar with the Clio logo, a search bar, and a user profile icon. Below the navigation bar is a sidebar with icons for home, calendar, list, and document. The main content area is titled "Invoice #23" and is divided into two columns. The left column contains "Details" and "Options" sections, each with several lines of placeholder text. The right column contains "Payments" and "Credit Notes" sections, also with placeholder text. At the bottom of the right column, the text "Clio LLP Attorneys at Law" is visible. The interface is clean and professional, with a blue and white color scheme.



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



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.

support@clio.com

1-888-858-2546

