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.**

Step 1

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

Step 2

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.

Step 3

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.

Clio Support 1-888-858-2546 | support@Clio.com | Clio Help Center