



Basics of Billing Webinar

Clio's Basics of Billing Webinar is designed to give a review of the basic functionality used to create Bills in Clio. In this session we discuss billing efficiently and effectively.

This Document will cover the basics of what is discussed in the Basics of Billing Webinar.

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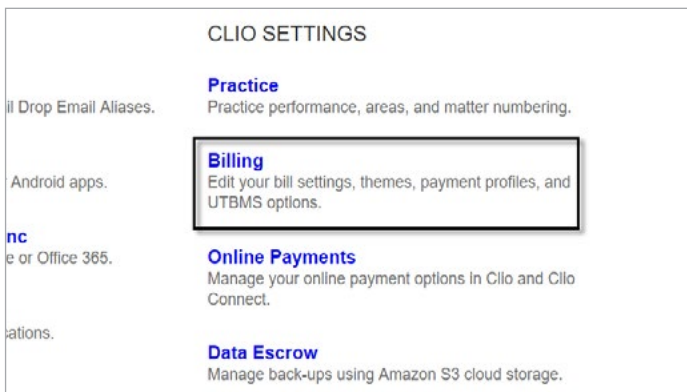
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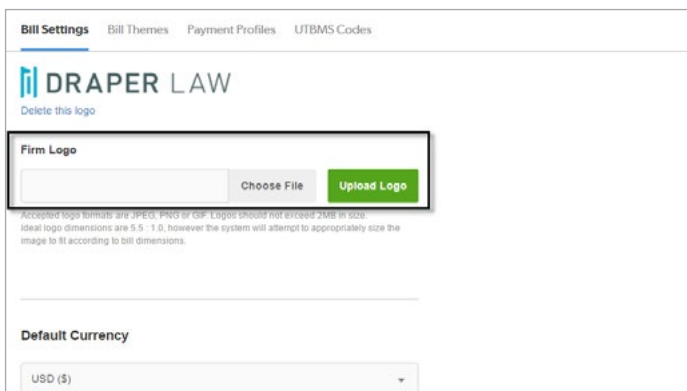
Bill Settings

Bill Settings are used to modify the background rules around bill creation and calculations. Set up Payment Profiles and Time Rounding from this page.

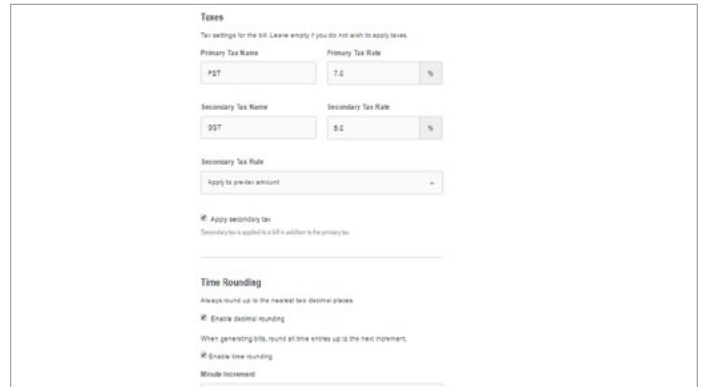
1. From the Settings page, select "Billing" under the "Clio Settings" column.



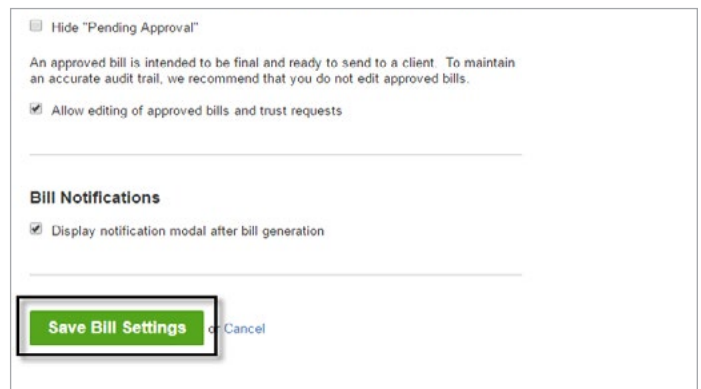
2. Select to upload a Firm Logo from your computer.



3. Select to have a Primary and Secondary Tax, and below that set-up Time Rounding on your account.



4. At the bottom of the page, click the Save button.

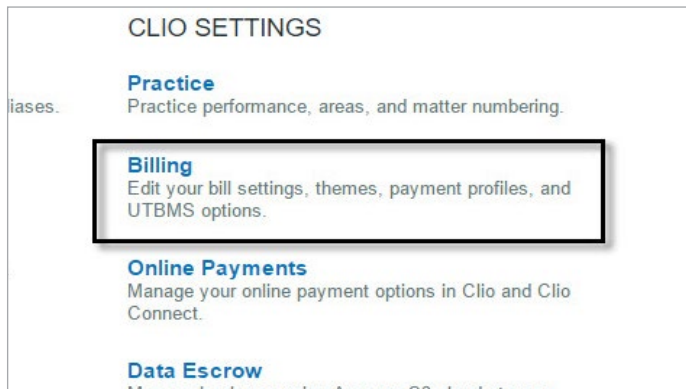


More details can be read in the [Billing Support Articles](#).

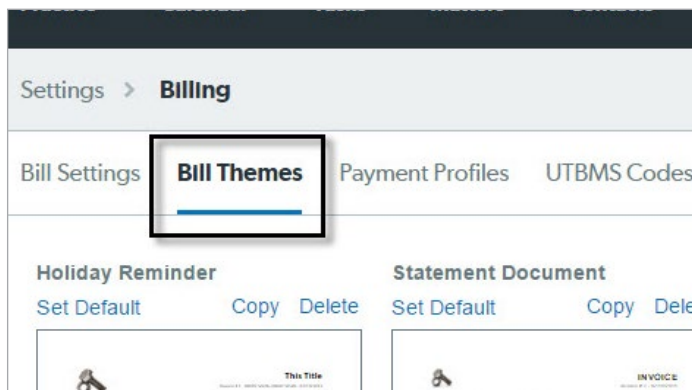
Bill Themes

Bill Themes allow you to customize your bills to better reflect your firm's unique brand.

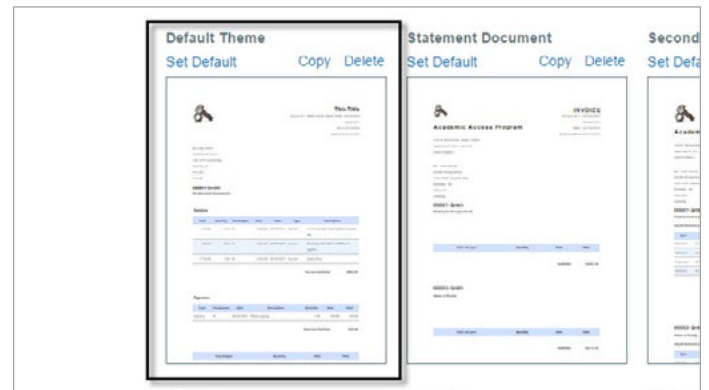
1. From Settings, select Billing on the right hand side.



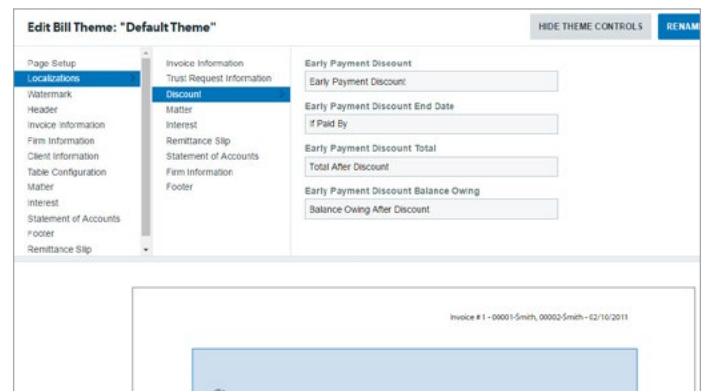
2. At the top of the Bill Settings page, select Bill Themes.



3. Select your desired Bill Theme.



4. In the Bill Themes options, select to change the phrasing of items on your bills, change how your firm's logo displays, and delve into separating and splitting entries.

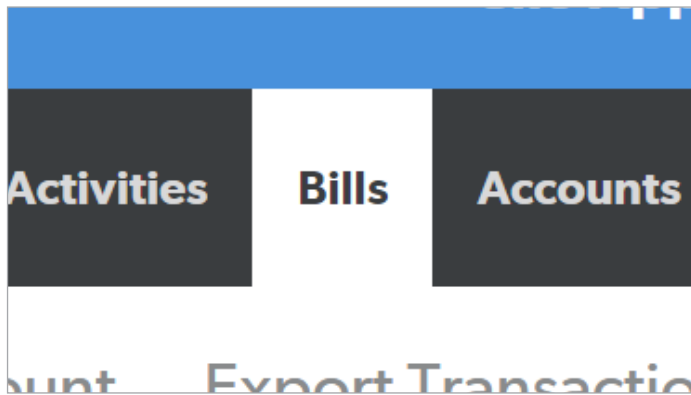


More details can be read in the [Billing Support Articles](#).

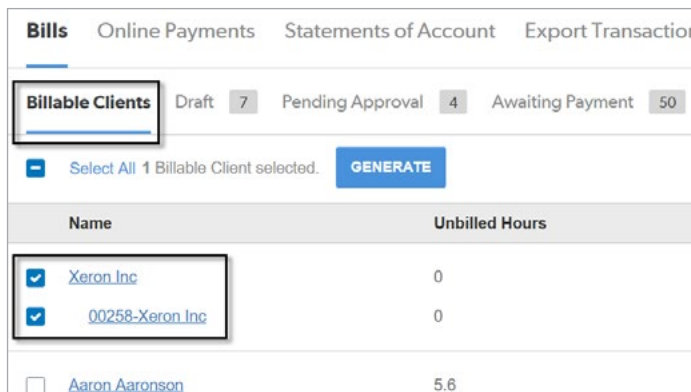
New Bill

Generating new Bills in Clio will grab unbilled Time and Expense Entries and place them on a client-facing invoice.

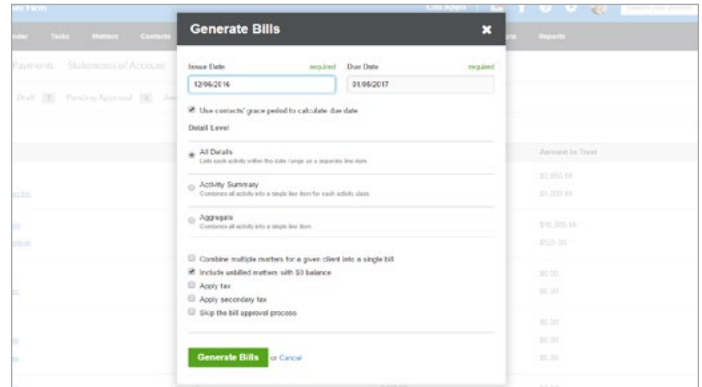
1. Select Bills at the top of Clio.



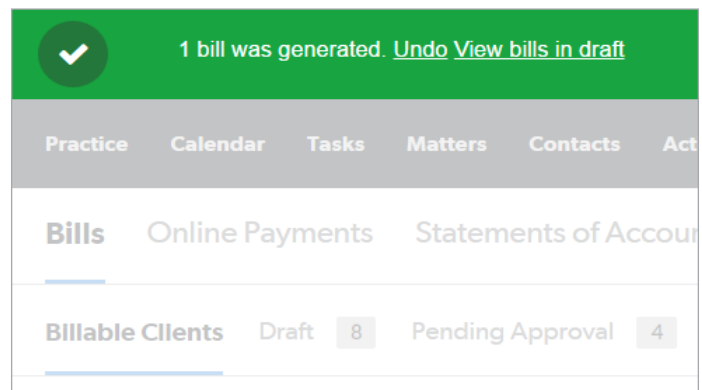
2. From Bills, select Billable Clients on the left hand side. Then, check off.



3. Input your Bill details, such as tax information, and select Generate Bills.



4. Click the underlined link "View bills in draft" to see the Draft section where the bill that was generated to.

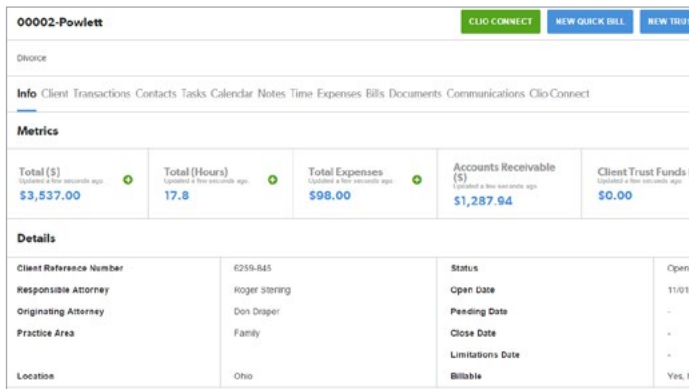


More details can be read in the [Billing Support Articles](#).

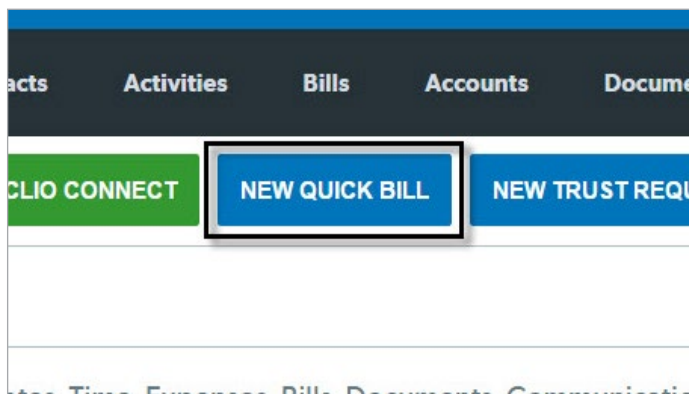
Quick Bill

Quick Bills grab unbilled Time and Expense entries for individual Matters or Clients and places them onto an invoice.

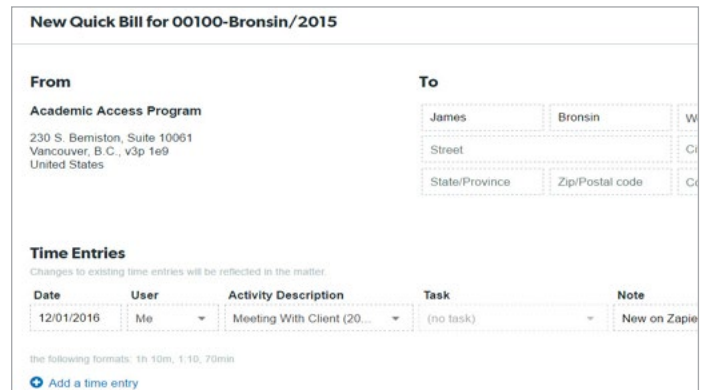
1. Open your client's Matter.



2. Select Quick Bill at the upper right.



3. Input your client's billing details.



4. Once you have finished entering the details, select Generate Bill at the lower left. Once it's ready, select View Bill.

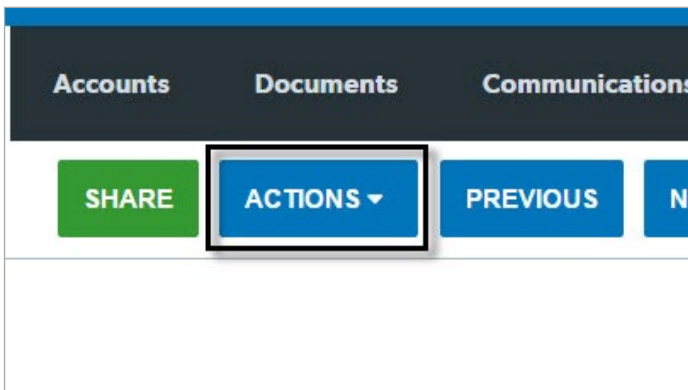


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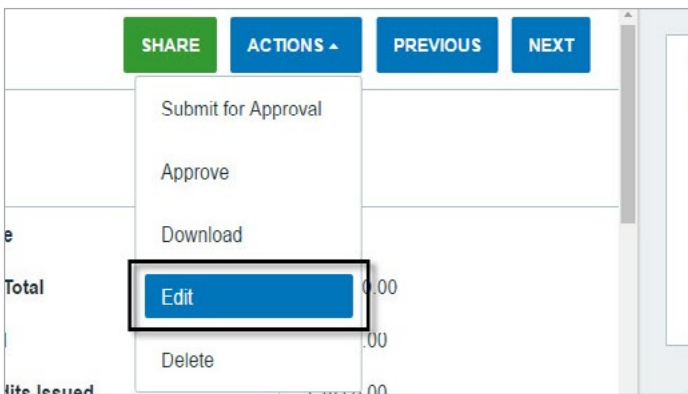
Edit Bill

Before Bills are in their final state, they can be modified to add additional entries, have entries removed, or change tax or discount details.

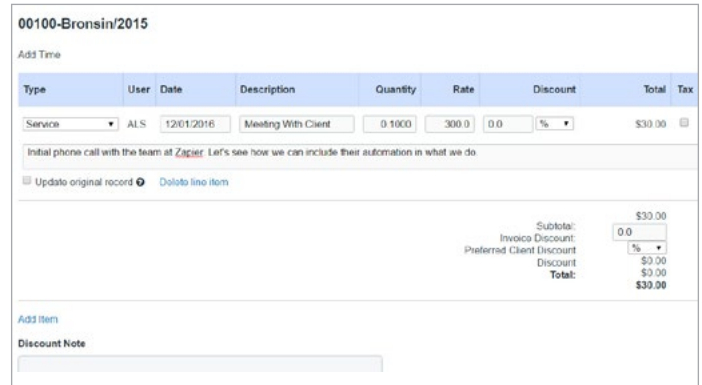
1. When viewing a Bill, select Actions at the upper right.



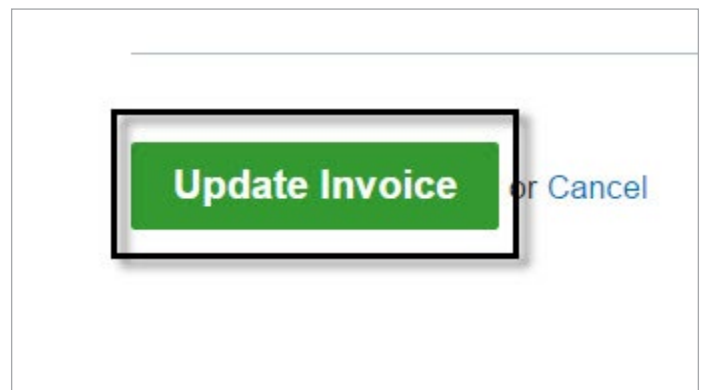
2. From the Actions drop-down, select Edit.



3. From the Edit screen, select to add new entries or modify existing billable entries.



4. When all modifications has been made, select Update Invoice.

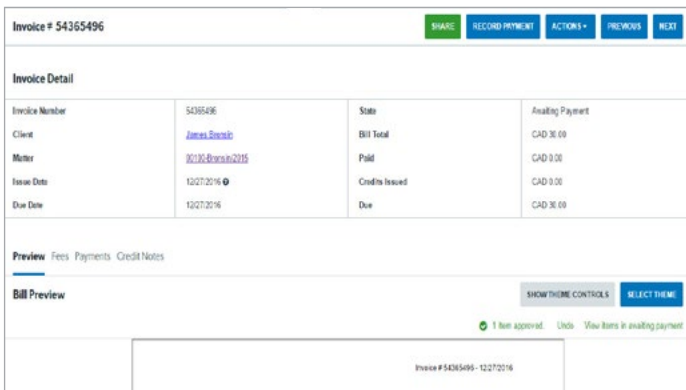


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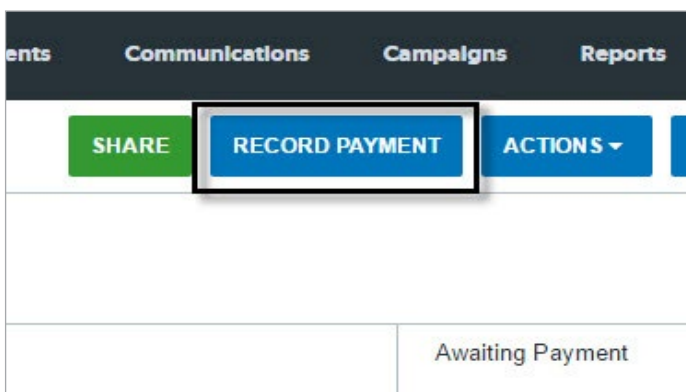
Write Offs, Discounts, Payments

When billing your clients, you can opt to include Write Offs, or Discounts to Bills to adjust their final amount. After these corrections, you can apply Payments.

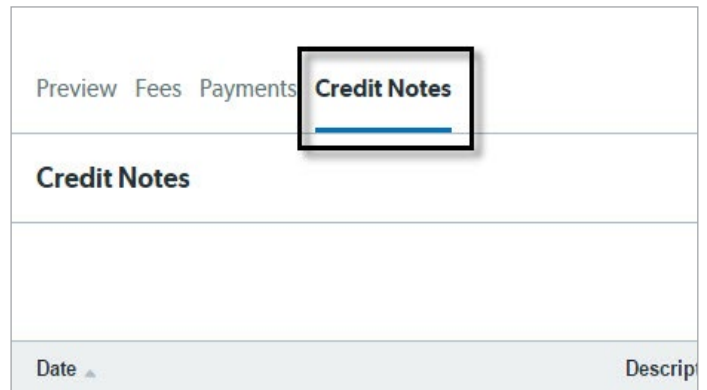
1. Open your client's Bill.



2. At the upper right, select Record Payment to apply a payment on the Bill.



3. At the middle left, select Credit Notes to apply a Write Off.



4. When editing a Bill, select to apply a Discount to the Bill, or to individual items.



More details can be read in the [Billing Support Articles](#).

Further Training:

Clio Product Pro

A guided learning Experience

After our Webinar, our users should feel more comfortable using our standard tools. For a more in-depth training experience, give Clio Product Pro a try!

Clio Product Pro Certification provides the opportunity to learn the ins and outs of Clio through a self-paced, guided learning experience. You'll start things off with an understanding of what it really means to work "in the cloud" and how to do so ethically and securely. Then, we'll explore all of our features and functions to ensure that you are absolutely comfortable managing your practice in Clio.

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