

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.

www.clio.com

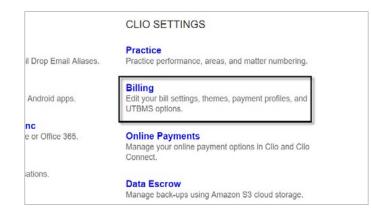
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Bill Settings

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.

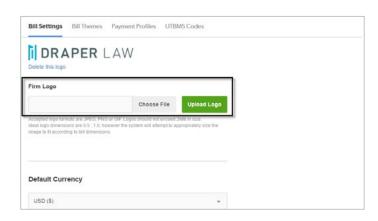


3. Select to have a Primary and Secondary Tax, and below that set-up Time Rounding on your account.

Tax settings for the bill. Leave	empty / you do not wish to appl	taves.
Primary Tax Name	Primary Tax Rate	
PST	7.4	
Secondary Tax Name	Becondary Tax Ra	
997	5.0	
Secondary Tax Rule		
Apply to pre-tax amount		
 Appy secondary tax Secondary tax is applied to a full is a 	dillor to be privacy tes	
Time Rounding		
Aways round up to the neare	al teo decimal places.	
R Enable desired rounding		
When generating bills, round	all time entries up to the next inc	emert.
R Enable time rounding		

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

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



	to be final and ready to send to a client. To maintain ecommend that you do not edit approved bills.	
 Allow editing of approve 	d bills and trust requests	
Bill Notifications Display notification mod	al after bill generation	
Save Bill Settings	o Cancel	

Bill Themes

Bill Settings

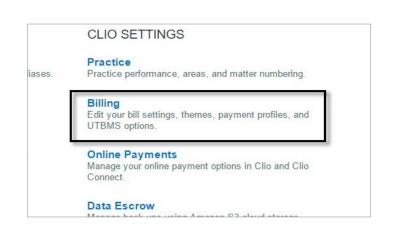
Set Default

*

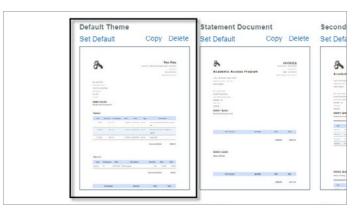
Holiday Reminder

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.



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.

Settings	>	Billing		

Payment Profiles

Set Default

8

Statement Document

UTBMS Codes

Copy Dele

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

Bill Themes

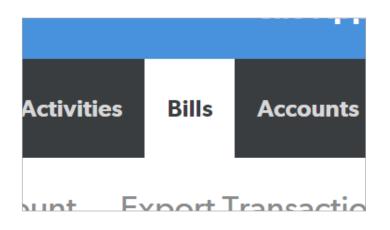
Copy Delete

This Title

Edit Bill Theme: "De	fault Theme"		HIDE THEME CONTROLS	RENAM
Page Setup Localizations 2 Watermark Header Invoice information Firm Information Client Information Table Configuration Matter	Invoice Information Trust Request Information Descurit Matter Interest Remittance Slip Statement of Accounts Furn Information Footer	Early Payment Discount Early Payment Discount If Paid By Early Payment Discount Total Total Afer Discount Early Payment Discount Balance Owing		
Interest Statement of Accounts Footer Remittance Stip		Balance Owing After Discount		
		Invoice #1-000	015mich, 000025mich - 62/16/2011	

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.



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

	Generate Bills 🗙 🗶	
ayments Statements of Account.	Issue Date required Daw Date required	
	12/06/2016 01/06/2017	
trat 12 Participational 12 Au	How contacts' grace period to calculate due date Dotait Level	
	Al Details Lob cash adhity within the calls range as a paperties line ison.	Amount In Trust
	Activity Summary Contracts of activity site a single line term for each activity class.	
	© Aggregite Continent all adult with a single line lane.	
	Consider multiple matters for a given client link a single bit Consider multiple matters with \$30 balance Apply reconfidery lass	
	Skip the bill approved process	
	Generate Bills or Carcal	

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

Bills	Online Payments Statement	s of Account Export Transaction
Billable	e Clients Draft 7 Pending App	proval 4 Awaiting Payment 50
n s	elect All 1 Billable Client selected.	IERATE
N	ame	Unbilled Hours
~ X	eron Inc	0
~	00258-Xeron Inc	0
	aron Aaronson	5.6

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

	1 bill was generated	l. <u>Undo View bills in draft</u>
	Calendar Tasks	Matters Contacts Act
Bills	Online Payments	Statements of Accour
Billable	Clients Draft 8	Pending Approval 4

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.

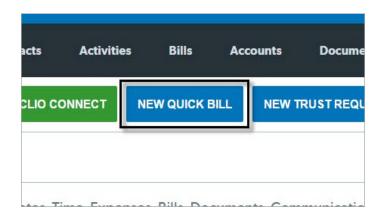
00002-Powlett			CLIO CONNECT	QUICK BILL NEW TRU
Divorce				
	ntacts Tasks Calendar Notes	Time Expenses Bills Document	ts Communications Clio Conn	nect .
Metrics				
Total (5) Updaed a few seconds ago \$3,537.00	Total (Hours) Updated a few accords age. 17.8	Total Expenses Updatel a fine records ego. \$98.00	Accounts Receivable (5) Updated a live seconds age \$1,287.94	Client Trust Funds Updeled a fee seconds app \$0.00
Details				
Client Reference Number	6259-845		Status	Oper
Responsible Attorney	Roger Stering	1	Open Date	11/0
Originating Attorney	Don Draper		Pending Date	
Practice Area	Family		Close Date	- 22
			Limitations Date	- 22
Location	Ohio		Billable	Yes

3.Input your client's billing details.

	Sill for 001	00-Bronsin/2015			
From			То		
Academic Acce	ess Program		James	Bronsin	W
230 S. Berniston, Vancouver, B.C.,			Street		Ci
United States			State/Province	Zip/Postal code	C
Time Entries Changes to existing		be reflected in the matter.			
	User	Activity Description	Task	Note	
Date					

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

2. Select Quick Bill att the upper right.



GENERA	TE BILL	

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.

Accounts	Documents	Communica	tions
SHARE		PREVIOUS	N

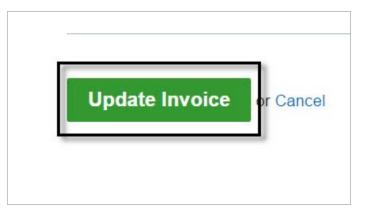
3. From the Edit screen, select to add new entries or modify existing billable entries.

Service ALS 12/01/2016 Meaking With Client 0.1000 300.0 0.0 % \$30.00 Initial phone call with the team at Zagar. Lef's see how we can include their automation in what we do	Туре		User	Date	Description	Quantity	Rate		Discount	Total	Ta
Update original record	Service	•	ALS	12/01/2016	Meeting With Client	0.1000	300.0	0.0	% *	\$30.00	. 6
Subotani 0.0 Invoice Discount 76. Preferred Client Discount 50.00	Update ori	ginal roce	ord O	Delete line item	1						
Invoice Discount Preferred Cater U.Scount Discount \$0.00										\$30.00	
Discount \$0.00								Invo			
\$30.00							Pre	ferred C	Discount	\$0.00 \$0.00	

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

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





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.

Invoice # 54365496		SHARE	RECORD PRYNERIT ACTIONS - PREVIOUS NEXT
Invoice Detail			
Invoice Number	54365496	State	Analting Payment
Client	James Bransin	Bill Total	CAD 30.00
Matter	90110-Brons in/2015	Pold	CAD 0.00
Issue Data	12/27/2016 @	Credits Issued	CAD 0.00
Due Date	12/27/2016	Due	CAD 30.00
Preview Fees Payments C Bill Preview	redit Notes		SHOWTHERE CONTROLS 4ELECTING
			• 1 item approved. Under Wew items in exaiting paym
			95-12/27/2016

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

Preview Fees Payments	Credit Notes
Credit Notes	
Date	Descri

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

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

SHARE	RECORD PAYMENT	ACTIONS -
	-	



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.

Sign up today at clio.com/clio-product-pro

