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Beautiful Bills

Contents

Clio's Beautiful Bills Webinar is designed to give an inside look at the operations of the Billing functionality and how to customize it to your firm's preferences.

This Document will cover the basics of what is discussed in the Beautiful Bills Webinar.

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Create Bill Themes

How:
Accessing Settings
Adding
Naming
Viewing the Bill Theme

Create Bill Themes

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Bill Themes is accessed by first going to Settings

Then selecting Billing

Billing
Edit your bill settings

Followed by Bill Themes

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Select New Theme on the right

NEW THEME

Add the name, and select Create New Theme

Name

Create New Theme or Cancel

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Display Options

Value:

Custom Theme

Change Firm Info

Change Display

Display Options

Select Clio Connect & Sharing in Settings

Edit Bill Theme: ...

- Page Setup
- Localizations
- Watermark
- Header
- Invoice Information
- Firm Information
- Client Information
- Table Configuration
- Matter
- Interest
- Statement of Accounts
- Footer
- Remittance Slip

Customize your bill theme.

Choose the section you would like to edit from the menu on the left.

Select an option to open a menu

- Page Setup
  - Margins
  - Typography
  - Format
- Localizations
- Watermark

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Working with the Bill Theme's Display Options

Edit Bill Theme: ...

Page Setup
Localizations
Watermark
Header
Invoice Information
Firm Information
Client Information
Table Configuration
Matter
Interest
Statement of Accounts
Footer
Remittance Slip

- **Page Setup**
  Modify Page Margins, Typography (Font Colour) and Format (Envelope Friendly)
- **Localizations**
  Change the phrasing of sections on your Bill
- **Watermark**
  Add or remove Draft and Void Watermark
- **Header**
  Add or remove the Invoice Number from the top of the Bill
- **Invoice Information**
  Modify the Title, Number, Subject, Issue Date, Due Date and Purchase Order
- **Firm Information**
  Display or hide the Firm Name, Logo, Address, and Alignment
- **Client Information**
  Add your Client's Phone Number, modify Spacing, change Typography, and change the Alignment of the address
- **Table Configuration**
  Change the Title, Heading, Row Borders, Odd and Even rows on your invoice
- **Matter**
  Change how the information displays after it is pulled from the billed Matter. This includes the Matter Number, Line Items, Attorney Information, Time, Expense, and Product information, as well as Clio Payments Information
- **Interest**
  Change how overdue Interest Charges are displayed
- **Statement of Accounts**
  Select to display Overdue Invoices, Trust and Operating Accounts, the alignment of the Columns, and the Summary Note
- **Footer**
  Modify the final statement at the bottom of the Bill
- **Remittance Slip**
  Display Check information, where Bank Information and Routing Numbers, and Swift information

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Client Info.

Modify:
Contact Info.
Firm Info.
Table Info.

Client Info.

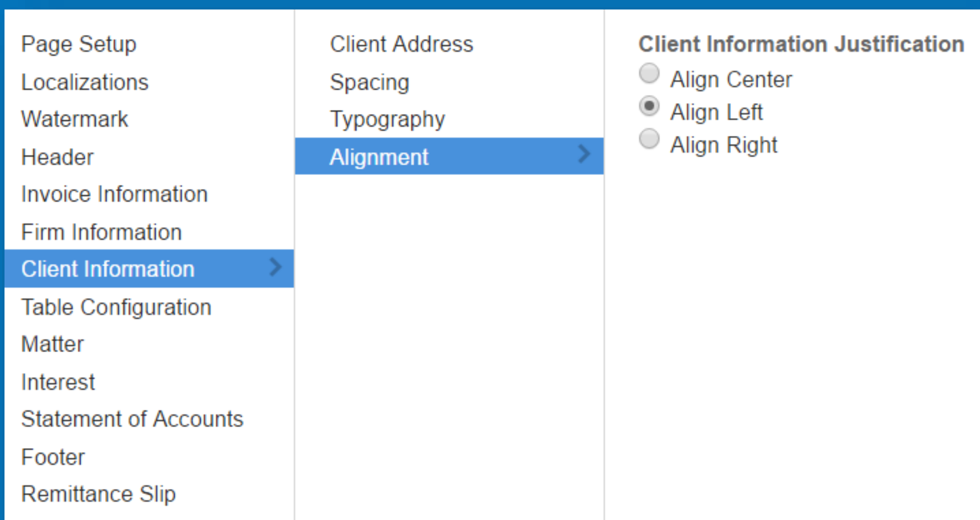
Client information can be customized in the 'Client Information' section

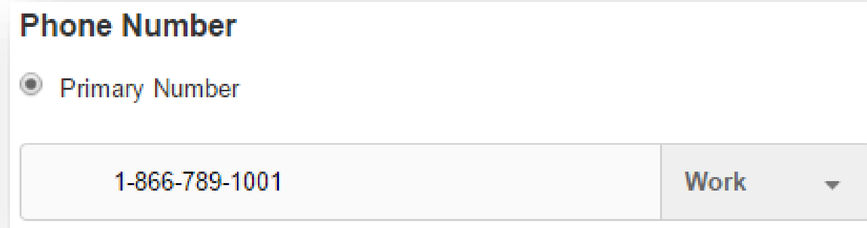
- Page Setup
- Localizations
- Watermark
- Header
- Invoice Information
- Firm Information
- Client Information
- Table Configuration
- Matter
- Interest
- Statement of Accounts
- Footer

Select an option to open a menu

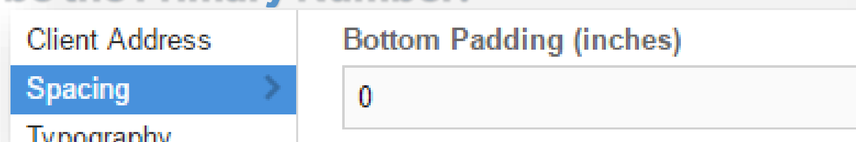
Page Setup	Client Address	Include Client Phone Number
Localizations	Spacing	
Watermark	Typography	
Header	Alignment	
Invoice Information		
Firm Information		
Client Information		
Table Configuration		

Working with Client Information

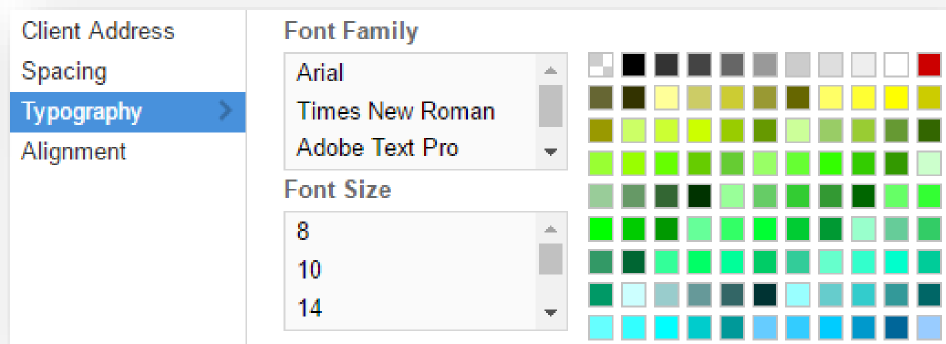




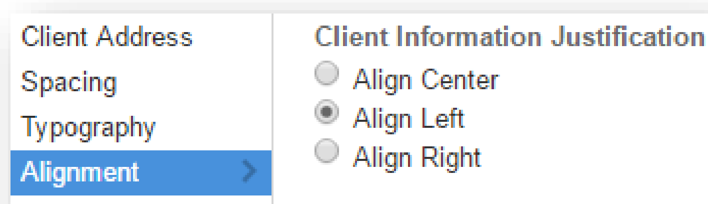
Client Address: Select to display your Client's Primary Phone Number. When creating or editing a Contact, more than one Phone Number can be assigned. The Phone Number displayed is selected to be the Primary Number.



Under Spacing select how much Padding should be added below the Client details and the rest of the invoice.



Beneath Typography select Font Family, Size, and Colour



With Alignment select on which portion of the page your Client Information should display

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Billing Info.

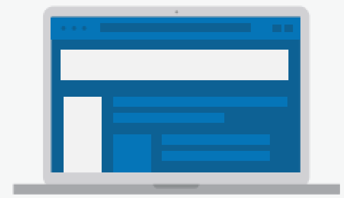
Can modify:

How Time, Expenses, and Products display

Billable Matter Information

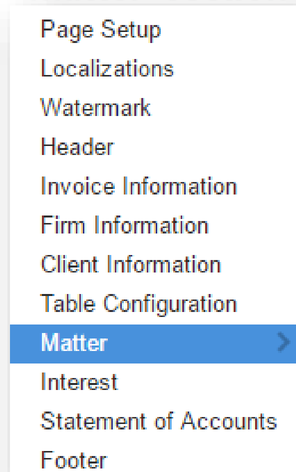
Attorney Information

Trust Information

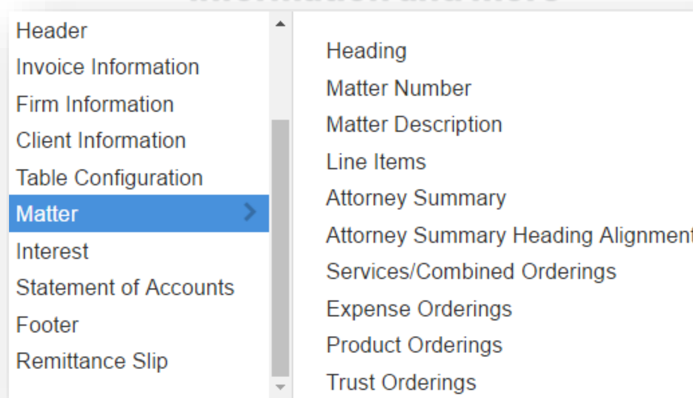


Billing Info.

Much of the Billing Information can be customized in the 'Matter' section



Within the Matter options you have the ability to change how Time, Expenses and Products are listed, Attorney information and more



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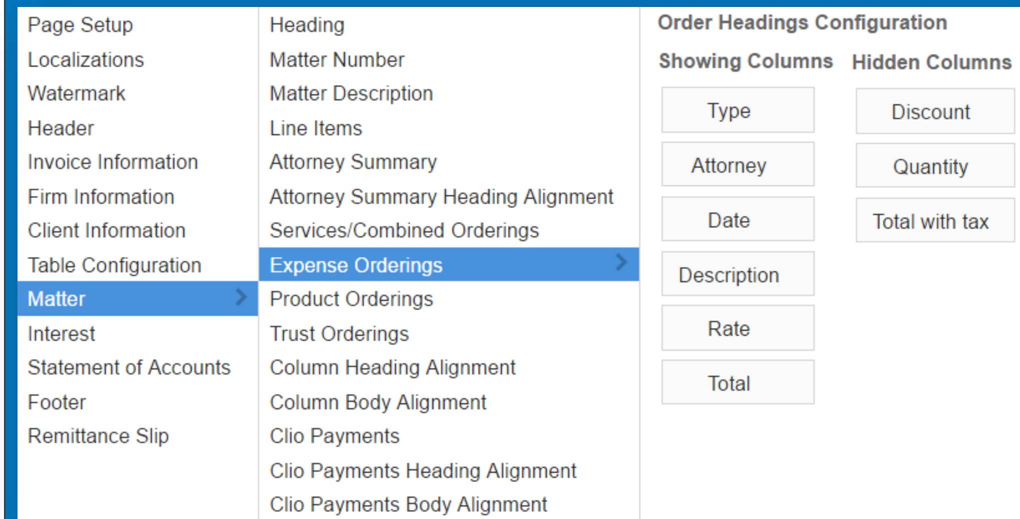
Working with Billing Information



- **Heading**
  Select to display the Matter Number, Description, VAT, and Client Reference Number. Choose Heading Alignment
- **Matter Number**
  Choose Font Family, Font Size, and Colour
- **Matter Description**
  Choose Font Family, Font Size, and Colour of the Matter Description
- **Line Items**
  Select to separate the Time Expenses and Products, select to show Subtotals, Attorney Name or Initials, and include Descriptions
- **Attorney Summary**
  Show the Attorney Summary, and show the position of the Attorney in the firm, and choose the Alignment
- **Services/Expense/Product Orderings**
  Select which Columns should display on the Bill such as Date, Rate, Quantity and Total
- **Trust Orderings**
  Select to display Date, Notes, and Total
- **Alignment**
  Change the Alignment to be justified Left, Center, or Right
- **Clio Payments**
  Opt to show Clio Payments
- **Clio Payments Alignment**
  Change the Alignment to be justified Left, Center, or Right for the Amount, Date, Note, Reference, and Status

Accounts

Provides:
Simplified view of Accounts
Detailed view of Accounts

Accounts

Within Statement of Accounts, select to display the Client Account

Page Setup
Localizations
Watermark
Header
Invoice Information
Firm Information
Client Information
Table Configuration
Matter
Interest
Statement of Accounts

Title
Summary of Accounts
Detail of Accounts
Client Account
Client Account Summary Heading Alignment
Client Account Details Heading Alignment
Column Heading Alignment
Column Body Alignment
Summary Note

Show Client Account Information
- Hidden
- Account Summary
- Account Details
- Include Operating Account History
- Omit Operating Balance Information
- Only show Trust amounts for matters on the bill
- Include matter-to-matter transfer transactions

Hidden, Account Summary, Account Details pertain to the Account Information and how it displays your Client's currently held balance in Trust

Show Client Account Information
- Hidden
- Account Summary
- Account Details
- Include Operating Account History
- Omit Operating Balance Information
- Only show Trust amounts for matters on the bill
- Include matter-to-matter transfer transactions

Select "Include Operating Account history" to show the Operating and Trust Accounts

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Overdue Bills

Displays:

Outstanding Revenue Bills

Overdue Revenue Bills

Overdue Bills

Under Detailed Statement of Accounts, select Show Detailed Statement

- Localizations
- Watermark
- Header
- Invoice Information
- Firm Information
- Client Information
- Table Configuration
- Matter
- Interest
- Statement of Accounts

- Title
- Summary of Accounts
- Detail of Accounts
- Client Account
- Client Account Summary Heading Alignment
- Client Account Details Heading Alignment
- Column Heading Alignment
- Column Body Alignment
- Summary Note

- [x] Show Detailed Statement
- [ ] Include Trust Account in balance calculations
- [ ] Include all clients' Matters

Once selected, your Client's current and outstanding Bills will display in the Detailed Statement of Account section at the bottom

Detailed Statement of Account

Other Invoices

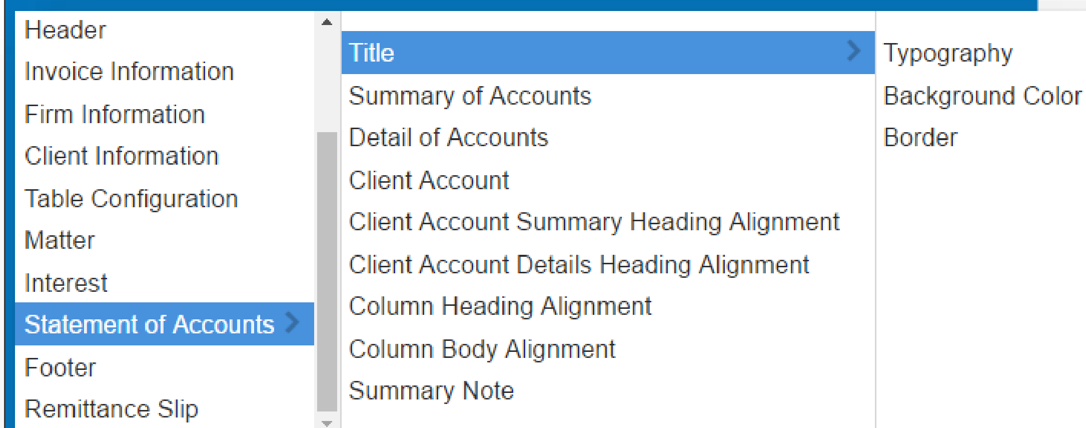
Invoice Number	Due On	Amount Due	Payments Received	Balance Due
9640	09/10/2016	$1,865.60	$0.00	$1,865.60

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
9644	09/14/2016	$1,050.00	$0.00	$1,050.00

Outstanding Balance	$2,915.60
Amount in Trust	$1,000.00
Total Amount Outstanding	$1,915.60

Working with Statement of Accounts



- **Title**
  Change the Typography, Background Colour, and Border
- **Summary of Accounts**
  Hide or show the Summary Statement, and select the detail level of the Summary Statement to include Balance information, Payments and Amounts in Trust
- **Detail of Accounts**
  Select to show the Detailed Statement that will display Overdue and Current invoices, show the Trust Account balance and opt to show all Matters
- **Client Account**
  Select to hide, show the Summary, or Details of the Transactions that have been made in your Client's Account. Opt to include Operating Account History, and Transfer Information
- **Client Account Summary Heading Alignment**
  Change the Alignment to be justified Left, Center, or Right for the Client Account Summary
- **Client Account Details Heading Alignment**
  Change the Alignment to be justified Left, Center, or Right for the Client Account Details Summary
- **Column Heading Alignment**
  Change the Column Heading Alignment for the Amount Due, Balance Due, Due On, Invoice Number, and Payments Received
- **Column Body Alignment**
  Change the alignment of the information that appears under the column headers
- **Summary Note**
  Opt to include a Summary Note, and customize the text that appears

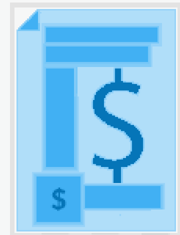
Applying Themes

<u>Displays</u>:

Custom Text

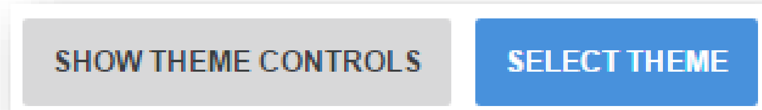
Can be Client Specific

Hide or Display Information

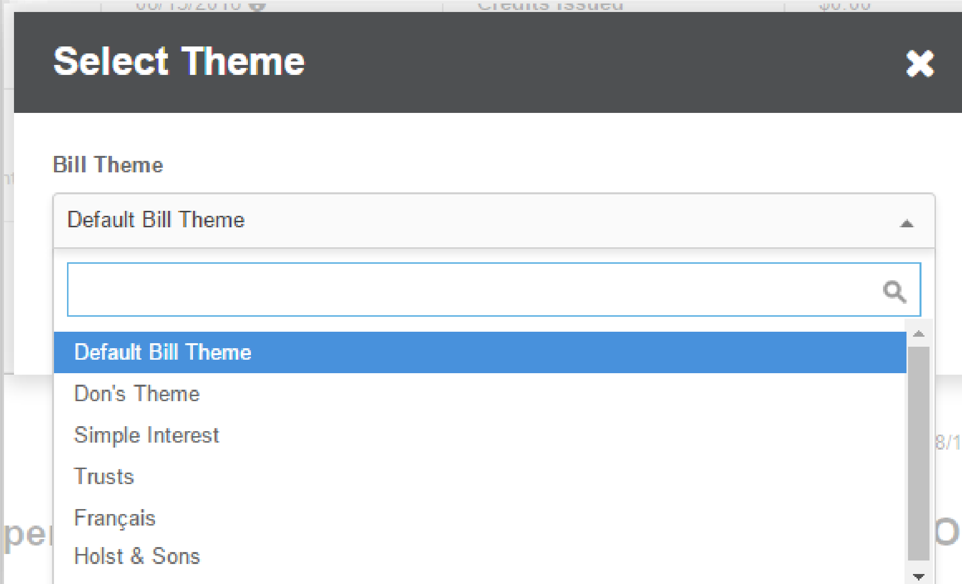


Applying Themes

When viewing your Client's Bill, click Select Theme



Toggle between different Themes to display your custom selected information



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Clio Product Pro

A guided learning experience.

www.goclio.com/clio-product-pro/sign-up-for-cpp

Further Training

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.