



## What are payment plans in Clio?

Payment plans simplify and automate online credit card billing from within Clio to help firms collect on their receivables, reduce overhead, and deliver a better client experience. Payment plans allow firms to schedule recurring client payments to pay down existing balances, or to top up trust accounts so that there's always money on hand to work a matter.

## Why do law firms need payment plans?

Payment plans allow firms to collect steady revenue from clients who are unable to make upfront payments for legal services. They also give firms the option to ensure clients have sufficient funds in trust so invoices can be collected on when needed.

## What value do payment plans bring to law firms?

With an increasing adoption of online credit card payments and 'subscription-like' fee models, payment plans in Clio help firms meet standards that clients now expect from modern law firms. Payment plans provide flexible payment options that allow clients to pay on terms that work for them, helping firms to deliver better client service. Further, the 'set and forget' mindset of payment plans supports firms to collect more—faster—with zero overhead.

## How do payment plans benefit different Clio users?

As a lawyer, you will benefit from increased revenue via new collection opportunities, higher revenues, and reduced non-billable time. As a bookkeeper, you can quickly and easily keep track of your firm's finances, and benefit from automating manual data entry.

## How do payment plans improve workflow efficiency?

Payment plans reduce time spent on non-billable work while also reducing the risk of errors. Firms no longer need to set calendar reminders to manually charge a client when each payment is due, and since all transactions are conducted automatically, there's no need to manually record payments, change the status an invoice, or update trust balances—it's all done for you.

## How do payment plans work?

On each scheduled payment date, the client will automatically be charged the lesser of the recurring

payment amount or the outstanding balance. When dealing with multiple invoices, payments are applied like bulk payments, in FIFO (first in first out) sequence. Payment plans end when the balance remaining after a payment is \$0 or a specified total amount is reached.

## Will both the firm and its clients be notified when a payment plan payment is processed?

Yes. Both the firm and its clients are notified via email when a card is charged, just like with Clio Payments. In addition to the amount charged, the email describes how much is remaining on the plan. Firms and their clients will also be notified when the plan has been completed.

## What happens when new invoices are added while a payment plan is active?

New invoices add to a client's outstanding balance—the plan will continue until this balance is \$0.

## Will payment plans automatically generate invoices?

No. Payment plans don't create invoices. Payments will be recorded on outstanding invoices (if deposited to operating) or will go right to the client trust (if deposited in trust).

## Who has access to payment plans?

All customers on Boutique and Elite plans that have Clio Payments enabled and are using the new Clio experience will have access to payment plans.

## Can all firm users use payment plans?

Only those with Billing permissions can access payment plans.

## Can clients set their own payment plans?

No. At this time, payment plans must be set up by the firm on behalf of their clients.

[Learn more about payment plans](#)