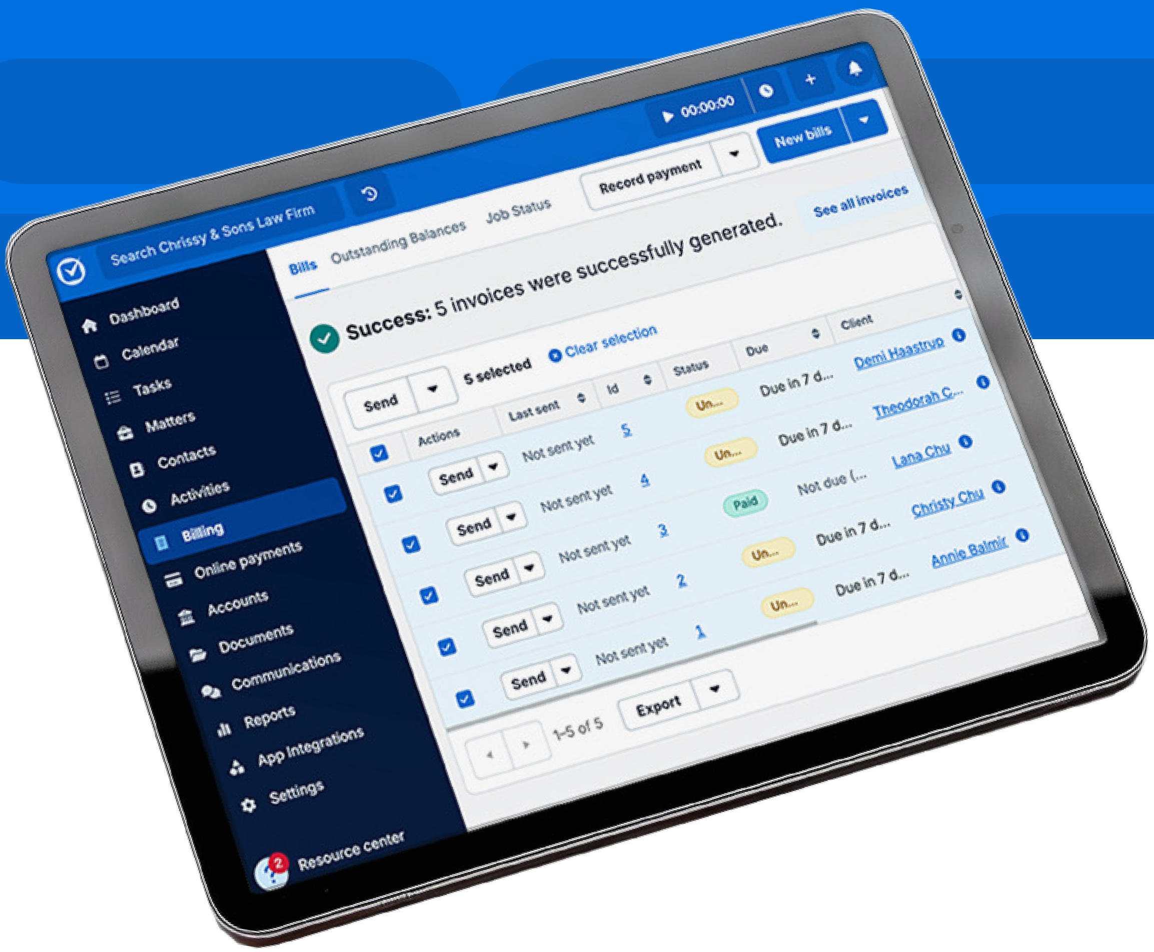
Bulk Billing
Best Practices Guide

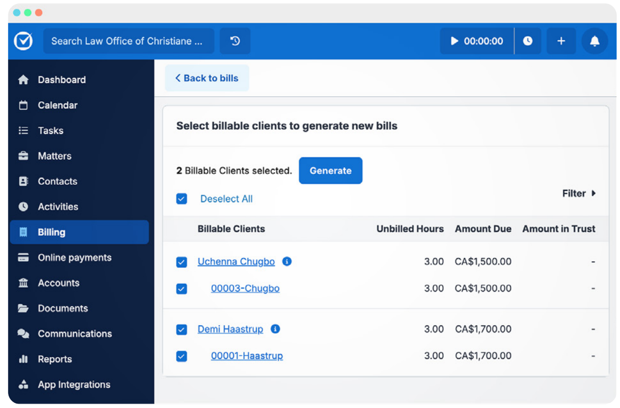


Bulk Billing

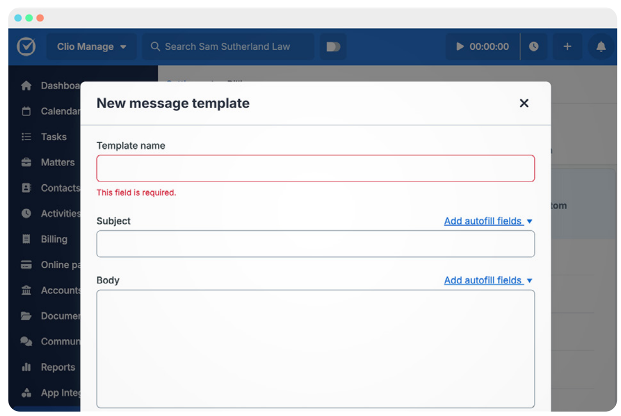
By using bulk billing in Clio Manage, you can quickly generate and send multiple invoices at once. This will save you time, make your billing process more efficient, and help prevent errors, ultimately leading to smoother cash flow management.

Bulk billing helps your firm:

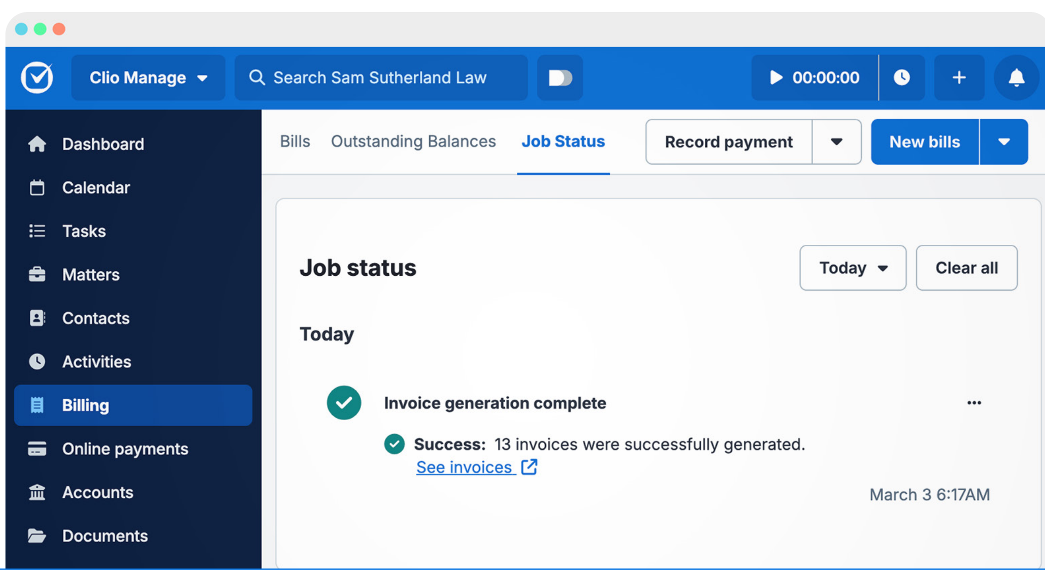
- **Bill more clients in less time.** Generate and send multiple invoices at once instead of individually creating invoices from the matter, so you can spend less time on admin work and more time on high-value tasks that help grow your firm.



- **Ensure consistency across all invoices.** Bulk billing ensures a polished, professional look by applying consistent formatting, detailed activity descriptions, and customizable bill message templates based on your preset preferences.



- **Catch errors before sending.** Use the job status tab to spot any issues early, leverage the approval process if it's required in your firm, and review invoices in draft mode or email previews to ensure accuracy before sending.



Getting Started

Step 1

Navigate to the **billing tab** in Clio Manage and select **new bills**. Then, choose all the bills you want to generate. You can use filters to refine your selection by date range, responsible attorney, or matter custom fields.

Step 2

Ensure your invoices are formatted correctly by selecting the appropriate [bill theme].

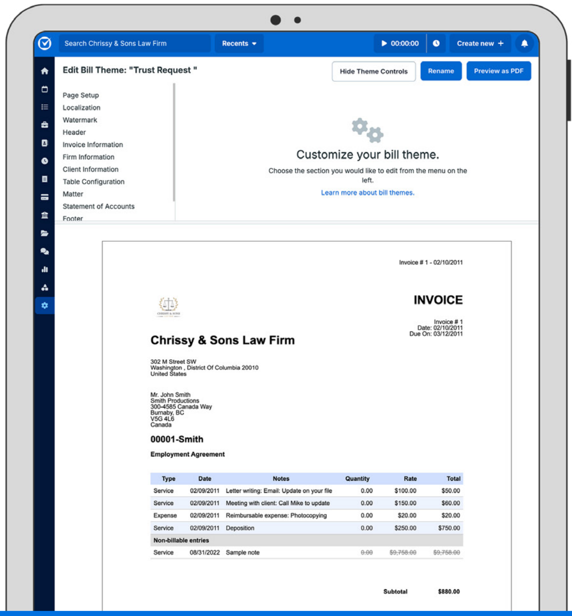
Step 3

After clicking **generate bill**, you'll be redirected to the **job status** page. Here you can monitor bulk billing actions, and if any errors occur, you can track and troubleshoot them based on the [descriptions].

Step 4

Once all invoices are generated, you can find them in the **bills tab** or under **drafts** if they still [require approval].

Instead of approving each bill individually, you can [approve and send multiple invoices in one step] by using the bulk bill actions. This saves time and ensures no bill is accidentally left as a draft.



Pro Tip

END-TO-END FINANCIAL MANAGEMENT WITH CLIO

When sharing a bill through Clio, the email address automatically populates and the send date is recorded in Clio. You can add a bill message and even send bills in bulk. Once your client has paid, their balance will automatically update to reflect the payment.

Best Practices

Deliver clear, personalized communication

- [ ] Customize your bill themes. Increase client trust by adding your firm's logo, fonts, and colors to your invoices. You can create separate themes based on your billing preferences or practice areas.
- [ ] Update your firm's email address. Stand out in your client's inbox by changing the default bill sender address notifications@clio.com to your firm's Microsoft or Google email.
- [ ] Personalize your bill messages. Pair every bill with a tailored message. Use autofill fields to add personal touches like your client's name along with specific information like the amount due.
- [ ] Automate reminders. Stay on top of payments by scheduling reminders to notify clients of upcoming or outstanding balances.

Sorting your invoices

- [ ] Filter invoices your way. To filter your invoices with more granularity, you can use custom fields to record information not automatically tracked in Clio, such as the client type (e.g. corporate clients), their preferred billing methods, or other case specifics.
- [ ] Collect consistent information every time. Group custom fields into sets tailored to specific practice areas or client types. This approach ensures you collect the information needed to create highly relevant invoices.

Sending invoices in bulk

- [ ] Refine billing batches with filters. When preparing invoices in bulk, use filters to select specific clients, matters, or date ranges, or even split bills. These filters allow you to further refine your selection, making it easier to send invoices to the right clients at the right time.
- [ ] Send a single invoice for multiple matters. For clients with multiple matters, you can consolidate unbilled time and expenses into one invoice. This not only simplifies your accounting but also increases transparency for your clients.

See how Patrick Neale & Associates uses bulk billing to save time.

> Clio's bulk billing feature saves me three hours a month.
>
> **Karen Klukiewicz**
> Chief Operating Officer, Patrick Neale & Associates

Karen's tips to help you with bulk billing

- The firm typically issues invoices on the 15th and the last day of the month, making adjustments to avoid billing on Fridays. This bi-monthly billing cycle improves cash flow, as many clients find paying bi-weekly invoices easier than monthly.
- The only time invoices are left out of a bulk run is due to specific circumstances, such as waiting for a matter to be completed or if the balance due is very small.
- The firm tailors the email message accompanying the invoice based on the client's specific situation. Depending on the client's preference, they may either attach the bill directly to the email or send it as a link as some clients are more accustomed to handling attachments.

Why Karen Klukiewicz loves using bulk billing:

- **It's fast.** Bills are generated in a few minutes, saving a lot of time.
- **It's flexible.** There are instances when it's necessary to delay billing certain clients. Bulk billing allows you to only issue invoices to the clients who are ready to receive them.
- **It's efficient.** With only a few clicks, the firm can send either a small number of bills or the entire batch. The faster invoices are sent out, the sooner they get paid.

Want more tips? Here are some helpful resources:

Join the community
Connect with other legal professionals using Clio through our forum.

Power up with Clio
Join us in a monthly webinar diving into best practices.

See what's new
Join our quarterly webinar featuring our latest product updates.

Have questions?
Visit the Help Center or contact customer support at 1-888-858-2546.

Clio