Master your billing

Accurate billing and financial tracking with TXdocs

Welcome! The webinar will start at 12:00 o’clock.

Presented by: Dries Driessen
Chief Operating Officer, TXdocs

Welcome

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- Questions? Please submit them using the questions box
- 1 hour of CLE ethics credit – proof of your attendance will be submitted to the bar. Provided that you've given us your bar number.
- Webinar will be recorded - you will receive an email with a link to the recording.
- A short survey will pop up after the webinar ends.

Questions

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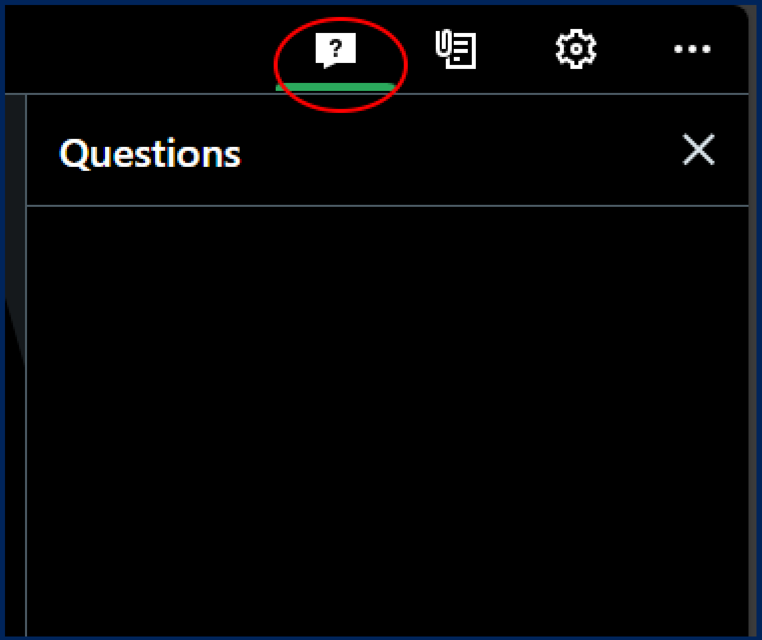

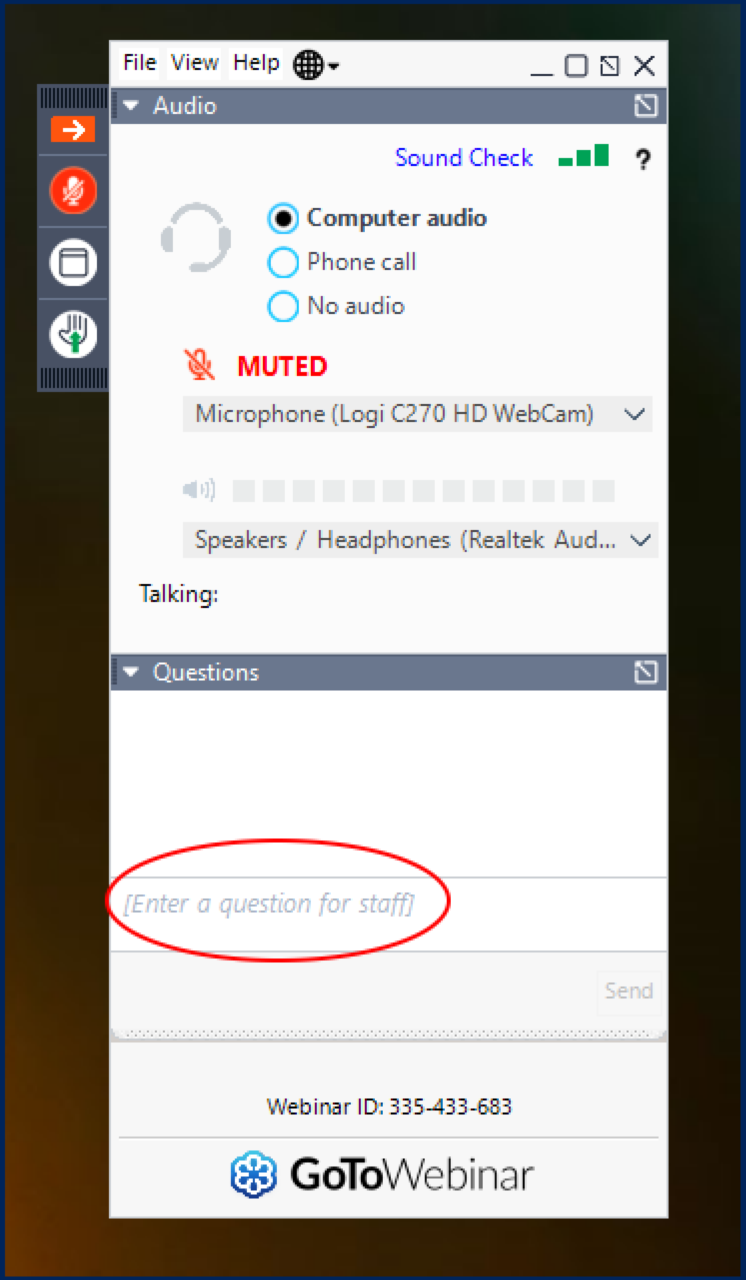

Agenda

- Time slips & expense slips
- Creating statements
  - Manual
  - Periodic
- Configuring statements
- Billing reports
  - Tracking payments and income
  - Tracking unpaid bills
  - Tracking hours per timekeeper and/or per type of case
  - Case Status
- Q&A

Time slips

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- Description
  - First line always on the statement. Displaying the full text can be turned off.
  - Available shortcuts for common text
- Hourly rate
  - Set per staff person in settings and in Rate Schedules
- Duration
  - hours:minutes or decimal hours
- Ok – option to create another

Timers

- Use timers to track your time
- Settings to control billing interval and round-up
- Pause and resume timers
- Add to the description during the day
- Minimize timers to get them out of the way

Expense slips

- Incurred expenses, to be reimbursed by your client
- Expense types to minimize typing
- Shortcuts available in Billing Settings

Creating statements

- Select the case
- Verify time & expenses on screen or on paper using the prebill
- Print the statement
- Finalize the statement
- Reprint statements
- Undo statements

Payments & Trust

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- Add manual payment
  - Payments aren’t posted until the next bill
  - The ‘NET’ column of the case status shows the current balance
- Payments from trust
  - See trust webinar: https://vimeo.com/952111053

Monthly/Periodic billing

- Creates bills for all of your cases, unless you filter out the ones you don't need.
- Inactivity filter
- Attorney filter
- Case type filter
- Date filter (Bill To Date)
  - Allows filtering out newer items such as time slips and expense slips

Configuring statements

- Billing settings
  - Control what is printed for each billing item
  - Control the look of the billing items
  - Customize the header of the bills
- Email settings
  - Enable in Billing Settings
  - Enable for each client

Case Types

- Configure in Firm Settings, Contacts & Cases
- Use case types to divide your cases across departments, locations, practice areas, etc
- Can be used in periodic billing to filter cases to bill.
- Used in billing reports as a filter and to summarize totals

Billing reports

- Aged Accounts Receivable
  - Treat unbilled payments as billed
- Hours
- Income
  - Payments + Payments from Trust
- Unbilled cases
- Case Status
  - Export to Excel

Free training

- Schedule free training for you and your staff: Go to the Learning Center menu in TXdocs
- For additional questions, assistance with configuration of TXdocsPlus, etc

Free trial of TXdocsPlus through July 31

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- Experience the ease of billing with TXdocsPlus, free through July 31st.
- Enjoy features like the Case Manager, Calendar, Task Manager and more.
- At the end of the free trial, your subscription will automatically revert to your previous version of TXdocs unless you communicate a desire to stick with the added efficiency of TXdocsPlus.

Q & A

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Helping Texas Attorneys Practice Smarter

- Questions? Please submit them using the questions box of the GoToWebinar side panel.
- TXdocs submits attorney attendance to the Bar.
- GoToWebinar sends an email to prove your attendance.
- You will receive another email with a link to this webinar’s recording.
- A short survey will appear at the end of the webinar.
- Thank you for attending. And as always, let us know how we can serve you better!