

THE RATE SCHEDULE FEATURE IN TXDOCS

TXdocs' Rate Schedule feature provides a way to set up different billing rates for different types of clients.

This document covers:

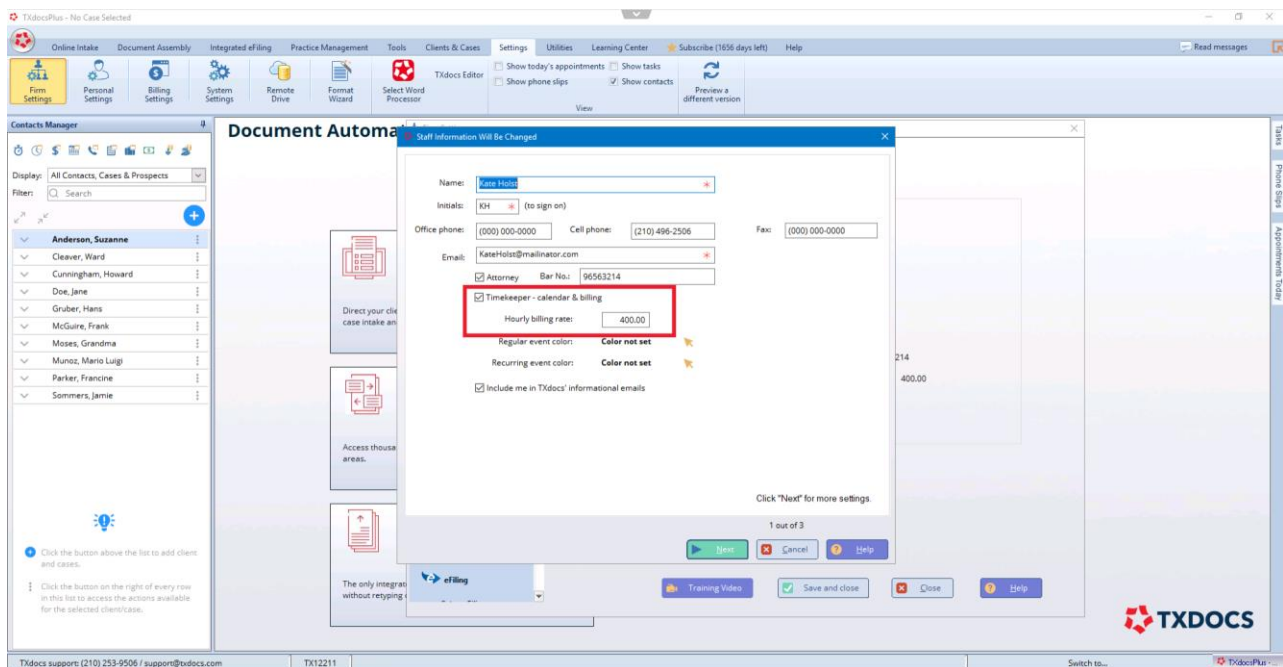
- How to set your base billing rate in TXdocs (*necessary before creating rate schedules*)
- How to create rate schedules
- How to select the billing rate for a case

SETTING YOUR HOURLY BILLING RATE

To set the base billing rate for yourself or another staff member, click on **Firm Settings**, found in the **Settings** tab. A window opens with the **Manage Staff** option highlighted.

Click on a staff member's name, then click **Edit**.

On the **Staff Information** window that opens, there is a field to enter an hourly rate. (See [image below](#)) There is also a check box used for designating a staff member as a Timekeeper. This box should be checked for any individual whose time is tracked and billed to clients.

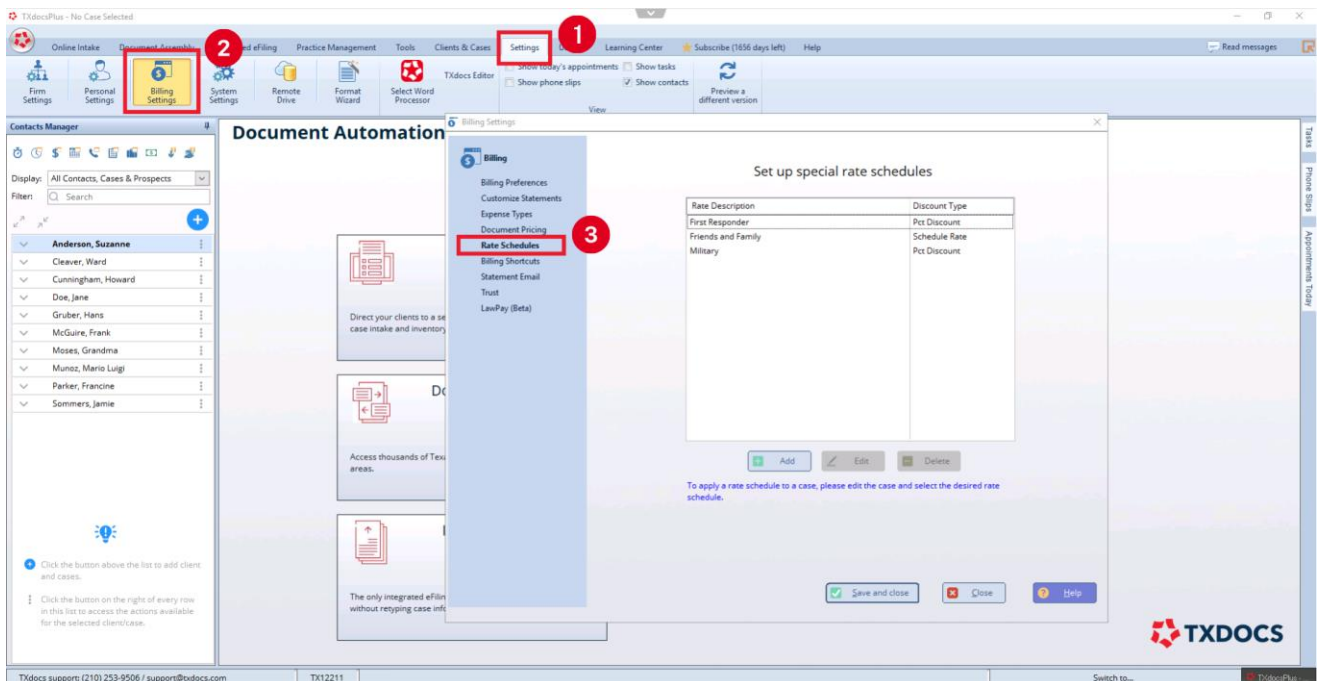


CREATING RATE SCHEDULES

Create Rate Schedules for unique billing situations or to allow for discounts. For example, you might choose to bill a client at your previous year's rate, or you may want to offer a reduced rate for military personnel, first responders, friends and family, etc.

To set up a Rate Schedule:

1. Click on the **Settings** tab in the top menu
2. Choose **Billing Settings**
3. Then select **Rate Schedule**



Click **Add** to set up a special rate schedule or click **Edit** to modify an existing one. A window opens with fields to:

- Provide a one-line description of the new Rate
- Select a type for the new rate – alternative rate, or a discount percentage.
- Adjust the amount/percentage for the Schedule Rate

(See image on the following page)

Record Will Be Added

Rate Description:

Rate schedule type

☒ Use alternative rate
 ☐ Discount percentage

Staff Member	Base Rate	Schedule Rate
Ben Oberon	200.00	200.00
Kate Holst	400.00	400.00
Ross Amick	425.00	425.00
Rusty Wilcox	325.00	325.00

Select Staff Member, then press Enter or double click to edit the Schedule Rate.

The base rate for each staff member is set in the staff properties, which can be found in the Firm Settings menu.

✓ Save

✗ Cancel

🔗 Help

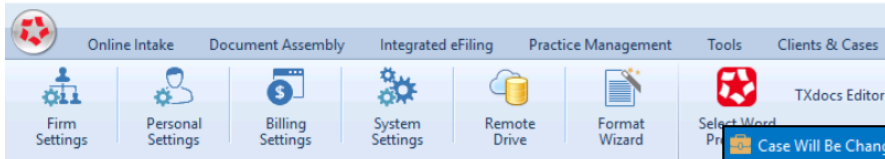
Once the new Schedule Rate is complete, click **Save** to close the window and return to the **Billing Settings**, then click **Save and close** to exit Billing Settings.

SELECTING THE BILLING RATE FOR A CASE

To select the rate used when billing for client cases:

- Click on a client listed in the Contacts Manager to expand the client's list of cases
- Right-click on a case, or click on the menu icon (three stacked dots) to open the case menu
- From the menu, select Edit **Case**
- Then choose a rate from the Rate Schedule menu.

(See image on the following page.)



Contacts Manager

Display: All Contacts, Cases & Prospects

Filter: Search

- Anderson, Suzanne
- Cleaver, Ward
- Cunningham, Howard**
 - Real Estate**
 - Trusts
- Doe, Jane
- Gruber, Hans
- McGuire, Frank
- Moses, Grandma
- Munoz, Mario Luigi
- Parker, Francine
- Sommers, Jamie

Document Automation

- Assemble documents
- Case manager
- eFile
- eServe
- Billing manager
- Time slip
- Expense slip

Case Manager

Client/Case Notes

People

Related Contacts

Related Attorneys

PhoneSlip re: Howard Cunningham - Real Estate

[Add a case for Howard Cunningham](#)
[Edit case - Howard Cunningham - Real Estate](#)
[Delete case - Howard Cunningham - Real Estate](#)
[Close case - Howard Cunningham - Real Estate](#)
[Copy case - Howard Cunningham - Real Estate with answers](#)
[Expand all](#)
[Collapse all](#)

Click the button above the list to add client and cases.

Click the button on the right of every row in this list to access the actions available for the selected client/case.

Edit Case

Case Will Be Changed

Client: Howard Cunningham

Description: Real Estate

Case type: (Not specified)

Billing

☐ Hold (do not generate statements in monthly billing)
☐ Pro bono case
☐ Automatically apply funds in trust to balance due on a statement

Trust minimum balance: 0.00

Trust replenishment level: 0.00

Rate Schedule: Base Rates

Base Rates

First Responder

Friends and Family

Military

Help