SETTING UP BILLING BY EMAIL IN TXDOCS

You can email billing statements to clients who prefer electronic delivery. Once a client is set up to receive billing by email, TXdocs will send the processed statement(s) directly to them.

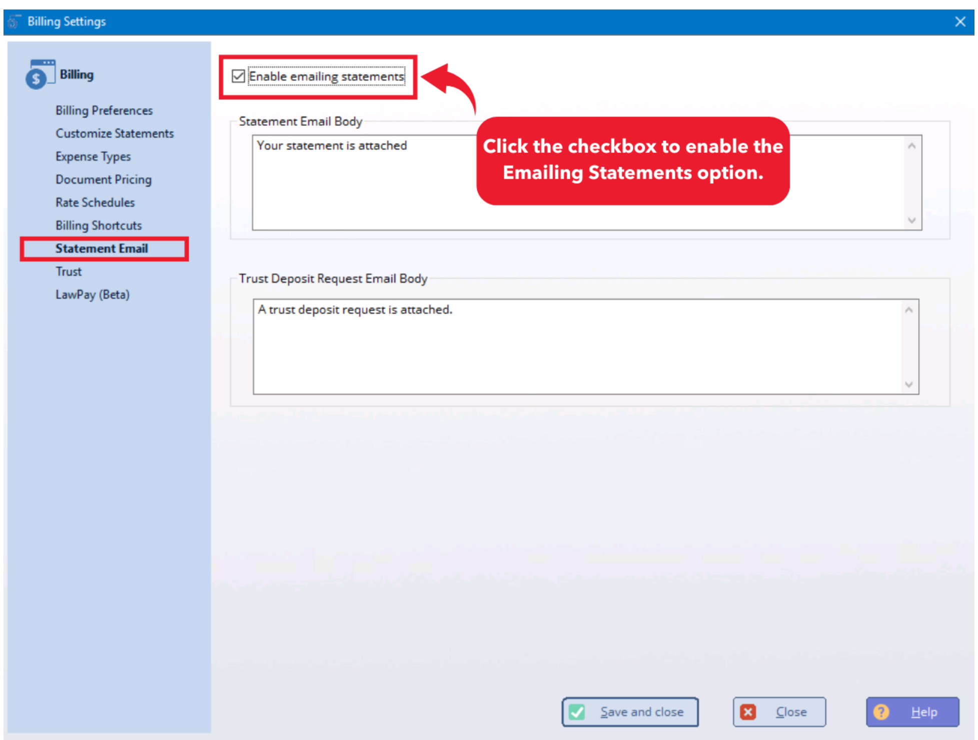
This document covers how to:

- Enable the “Email Statements” option in TXdocs
- Set up clients to receive billing statements by email
- Designate a bill to be sent via email

ENABLE EMAIL STATEMENTS

To enable the Email Statements option, click on **Settings** in the top menu bar, then select **Billing Settings**. From the Billing Settings window, select **Statement Email** from the menu at left.

Click to check the box for “Enable Email Statements.”

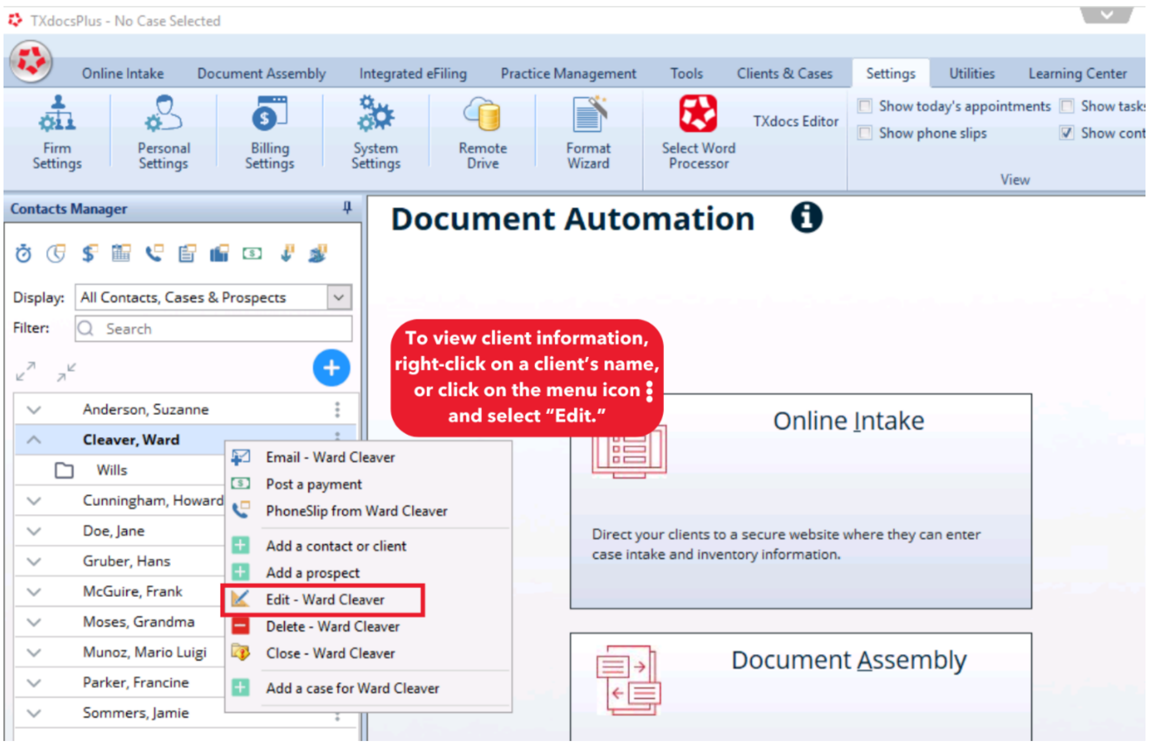


Also, from this settings window, you have the option to customize the **Statement Email Body**. Your clients will see your custom message, and the statement will be attached.

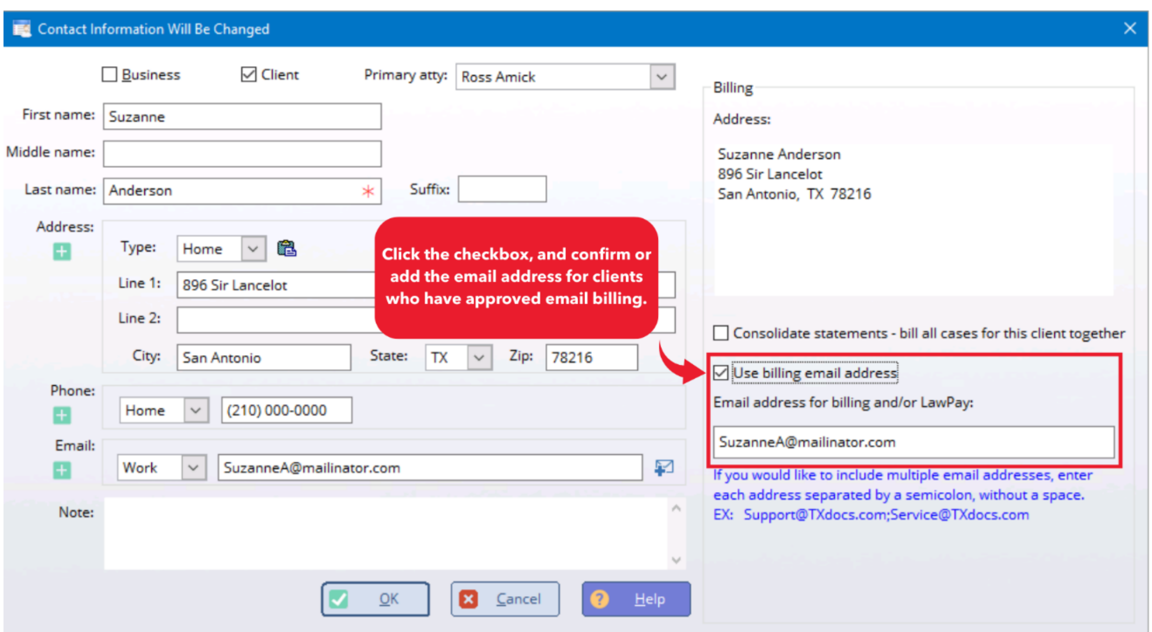
SETTING UP CLIENTS TO RECEIVE BILLS BY EMAIL

Enabling Email Statements adds a billing email option to the client information settings.

Viewing/Editing Client Information



Contact Information Window

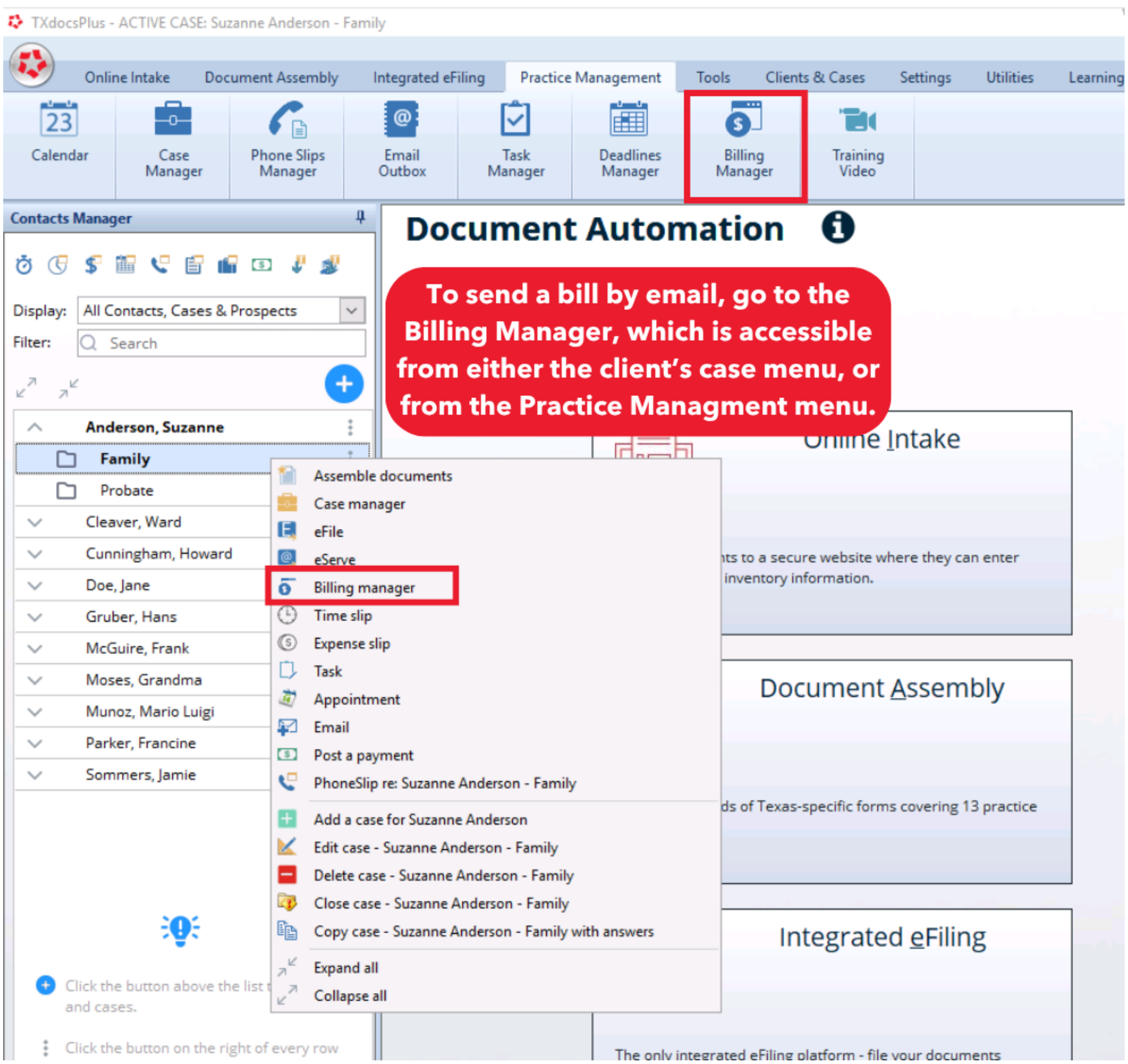


By default, the **Use billing email address** checkbox is unchecked for all clients, allowing you to enable it only for clients who have agreed to receive bills by email.

- When checked, the email address field activates and automatically fills in with the client's email address, if one is already saved in their contact information.
- If no email address is on file – or if your client would prefer to receive bills at a different address – you can enter or update the email address in the field.
- Click OK to save your changes and close the contact information window.

DESIGNATING A BILL TO BE SENT BY EMAIL

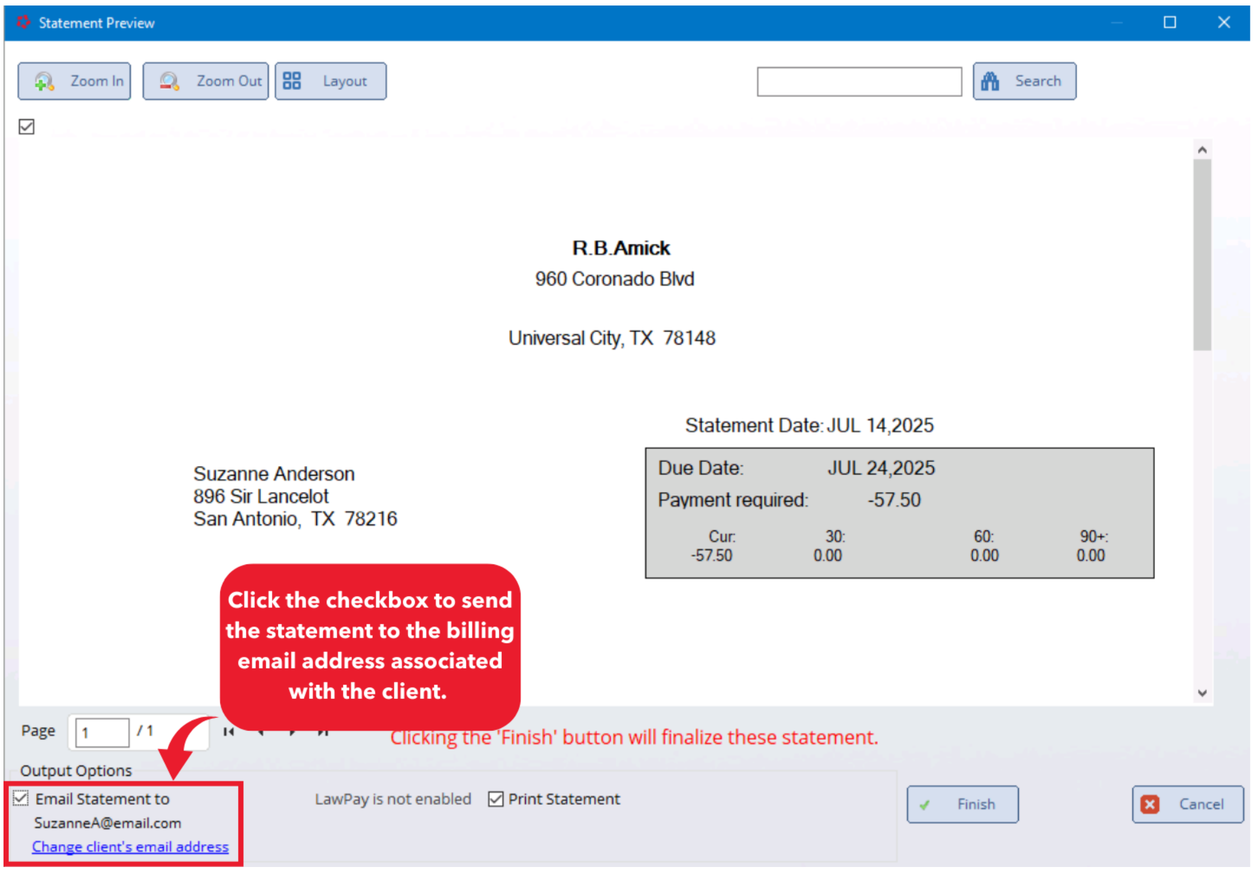
When you're ready to send a bill by email, go to the Billing Manager.



The “Email statement” checkbox appears on the Statement Preview window.

- When preparing a single or consolidated statement for a specific case, this window appears after you click the “**Print Statement**” button.
- When generating firmwide monthly or periodic billing statements, the window appears after you click the “**Generate final statements**” button.

(The Statement Preview below is for single/consolidated statements.)



Click the checkbox to have the statement(s) sent by email.