

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.”

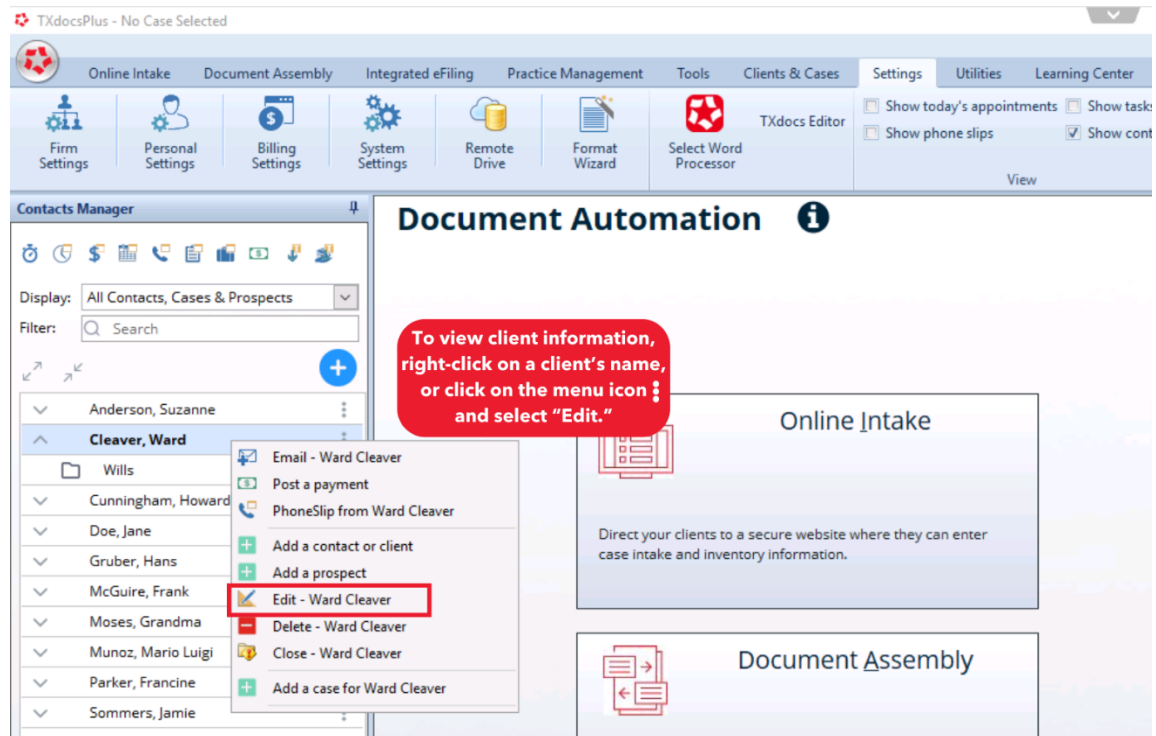
The screenshot shows the 'Billing Settings' window. On the left sidebar, under the 'Billing' section, 'Statement Email' is selected and highlighted with a red box. In the main content area, the 'Enable emailing statements' checkbox is checked and highlighted with a red box. A red arrow points from a red callout box containing the text 'Click the checkbox to enable the Emailing Statements option.' to the checkbox. Below this, there are two text input fields: 'Statement Email Body' with the placeholder text 'Your statement is attached' and 'Trust Deposit Request Email Body' with the placeholder text 'A trust deposit request is attached.' At the bottom of the window, there are three buttons: 'Save and close' (with a green checkmark icon), 'Close' (with a red X icon), and 'Help' (with a yellow question mark icon).

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

The screenshot shows the 'Contact Information Will Be Changed' window. It contains fields for client information and a 'Billing' section. The client information fields include: First name: Suzanne, Middle name: (empty), Last name: Anderson, Suffix: (empty), Address: Type: Home, Line 1: 896 Sir Lancelot, Line 2: (empty), City: San Antonio, State: TX, Zip: 78216, Phone: Type: Home, (210) 000-0000, Email: Type: Work, SuzanneA@mailinator.com. A red callout box points to the 'Email' field with the text: 'Click the checkbox, and confirm or add the email address for clients who have approved email billing.' The 'Billing' section includes a checkbox for 'Consolidate statements - bill all cases for this client together' and a checkbox for 'Use billing email address' (checked). Below this is a text field for 'Email address for billing and/or LawPay:' containing 'SuzanneA@mailinator.com'. A red box highlights the 'Use billing email address' checkbox and the email address field. At the bottom are buttons for OK, Cancel, and Help.

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 screenshot displays the TXdocsPlus software interface for an active case, "Suzanne Anderson - Family". The top navigation bar includes tabs for Online Intake, Document Assembly, Integrated eFiling, Practice Management, Tools, Clients & Cases, Settings, Utilities, and Learning. Below this, a row of icons represents various functions: Calendar, Case Manager, Phone Slips Manager, Email Outbox, Task Manager, Deadlines Manager, Billing Manager (highlighted with a red box), and Training Video.

The main area is divided into two sections. On the left is the "Contacts Manager" pane, which shows a list of contacts under the "Anderson, Suzanne" family. The "Billing manager" option is highlighted with a red box in the context menu. On the right is the "Document Automation" section, which contains a red callout box with the text: "To send a bill by email, go to the Billing Manager, which is accessible from either the client's case menu, or from the Practice Management menu." Below this, there are sections for "Online Intake", "Document Assembly", and "Integrated eFiling".

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.)

The screenshot shows the 'Statement Preview' window. At the top, there are buttons for 'Zoom In', 'Zoom Out', and 'Layout', along with a search bar. A checkbox is checked in the top left corner. The main content area displays the following information:

R.B. Amick
960 Coronado Blvd
Universal City, TX 78148

Statement Date: JUL 14, 2025

Suzanne Anderson
896 Sir Lancelot
San Antonio, TX 78216

Due Date:	JUL 24, 2025			
Payment required:	-57.50			
Cur:	30:	60:	90+:	
-57.50	0.00	0.00	0.00	

At the bottom, there is a 'Page 1 / 1' indicator and a red arrow pointing to the 'Email Statement to SuzanneA@email.com' checkbox. A red callout box says: 'Click the checkbox to send the statement to the billing email address associated with the client.' Below this, there is a red text box that says: 'Clicking the 'Finish' button will finalize these statement.' The 'Output Options' section includes a checkbox for 'Email Statement to SuzanneA@email.com' (checked), a link 'Change client's email address', and a checkbox for 'Print Statement' (checked). There are also buttons for 'Finish' and 'Cancel'.

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