SETTING UP A MONTHLY/PERIODIC BILL

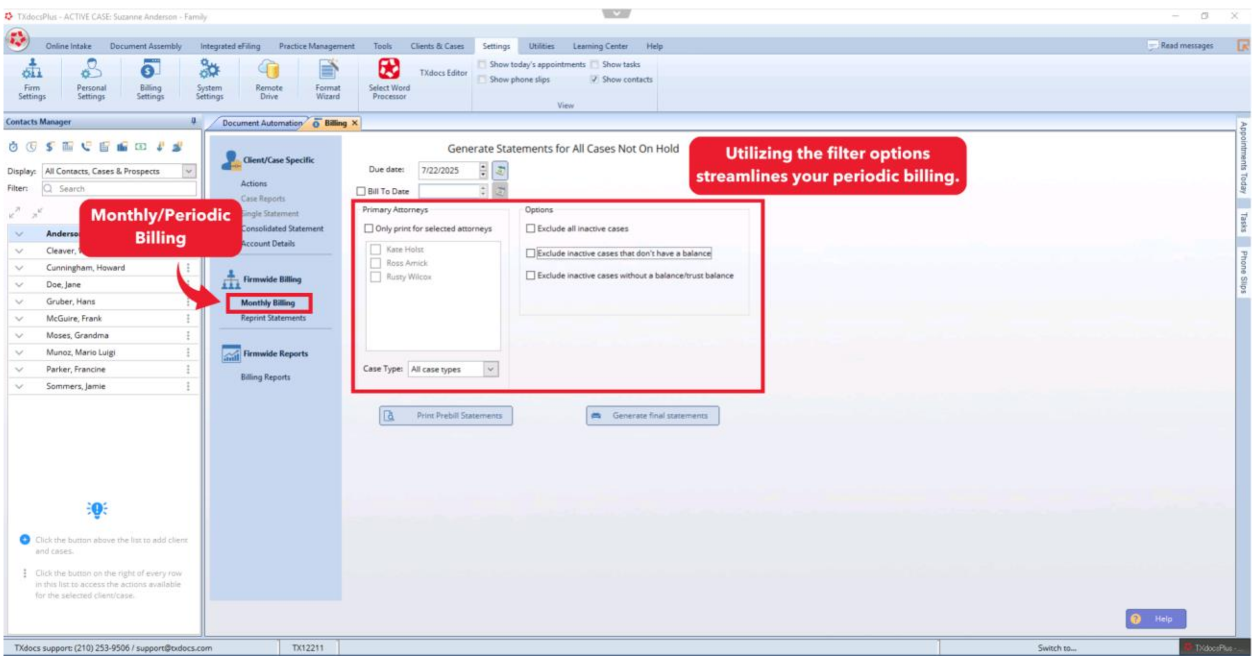
Learning about the filter options available when setting up a monthly/periodic bill will ensure that each bill is set up efficiently and precisely.

This document covers:

- A brief description of monthly/periodic billing
- TXdocs' filter options

MONTHLY/PERIODIC BILLING

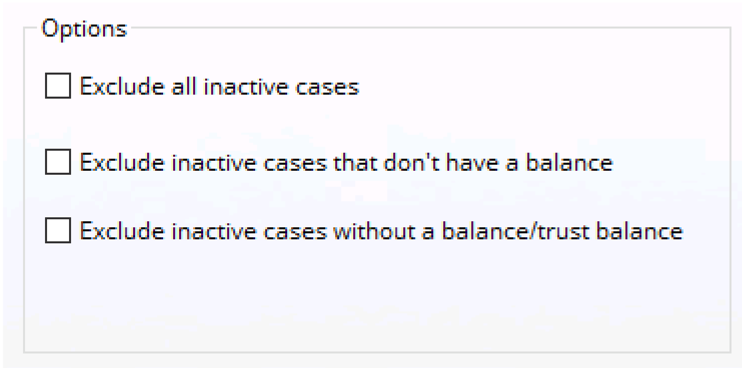
Though termed "Monthly Billing" in the Billing Manager's side menu, you are not limited to billing only once a month. You can use the function to prepare periodic bills whenever you'd like.



If the filter settings are used as is, without modification, the system will create a bill for every single case that you have, even those that do not show any billable activity. Depending on the number of clients and cases you have, that could result in considerably more information than you want.

FILTER OPTIONS

Utilize the filters to focus your billing on subsets of clients.

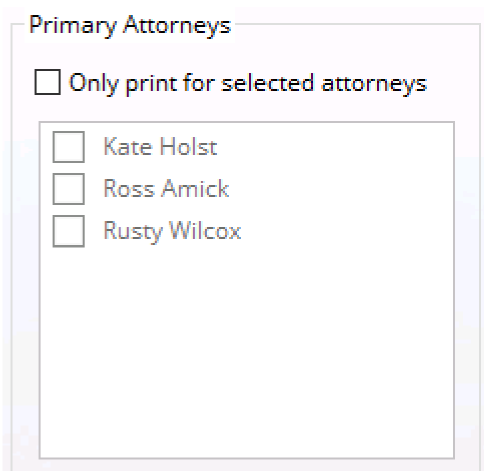


1. **Exclude all inactive cases**
   This option reduces the list by removing cases with no current billable activity.

2. **Exclude all inactive cases that don’t have a balance**
   This option removes cases with no current billable activity, but will include any with a balance still owed.

3. **Exclude all inactive cases without a balance/trust balance**
   This option also removes cases with no current billable activity, but will include any with a balance still owed and those that still have a balance in their trust.

4. **Filter by attorney**

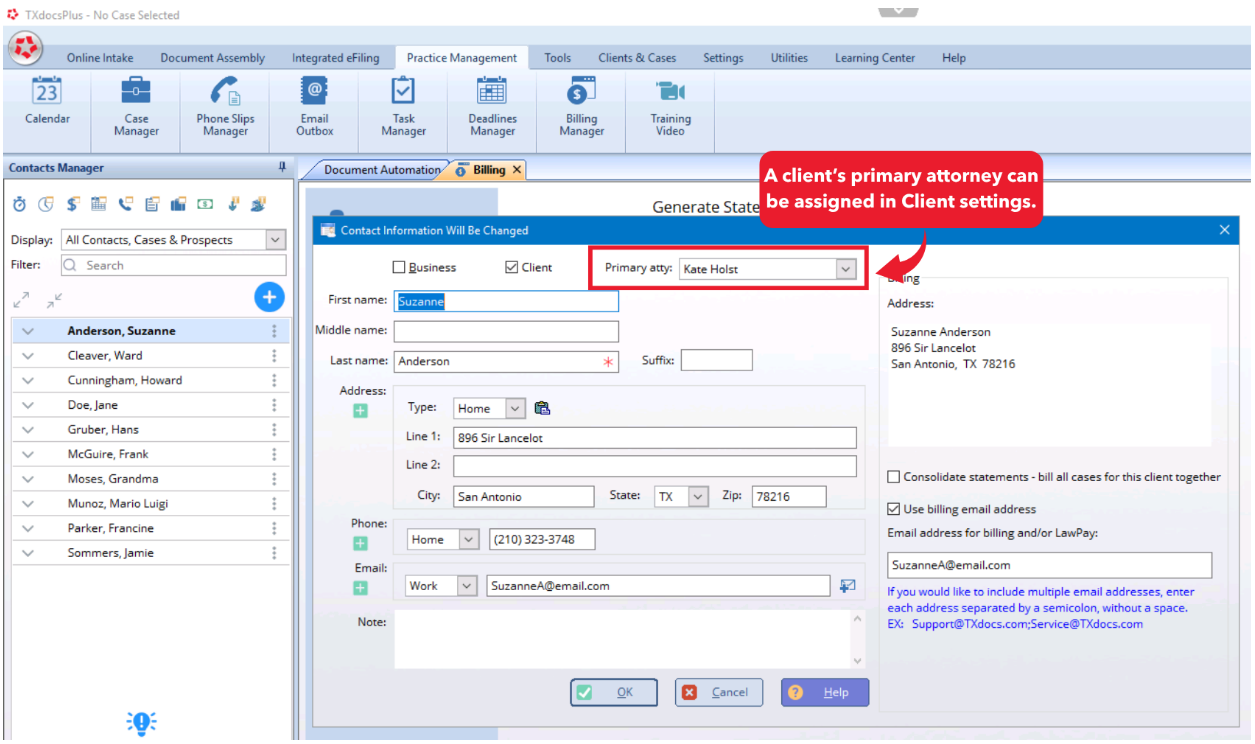
   

   If you have multiple attorneys at your firm, you can generate bills specifically for their clients.

   A primary attorney can be assigned to a client in Client settings.

   To access Client settings, right-click on a client’s name in the Contacts Manager, then, from the menu that displays, select “Edit – client’s name” (e.g., Edit – Susanne

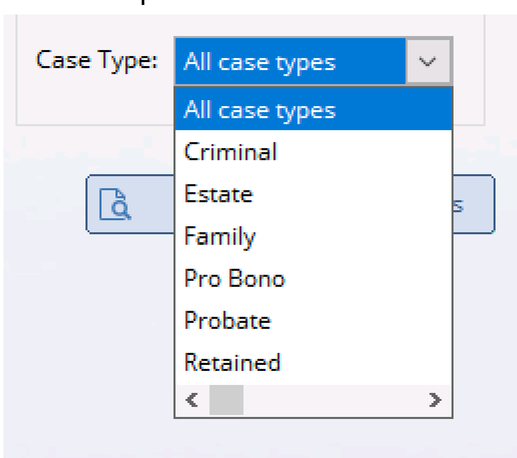
Anderson). A window displays the client's contact information.



Use the dropdown menu at the top of the window to assign an attorney to the client.

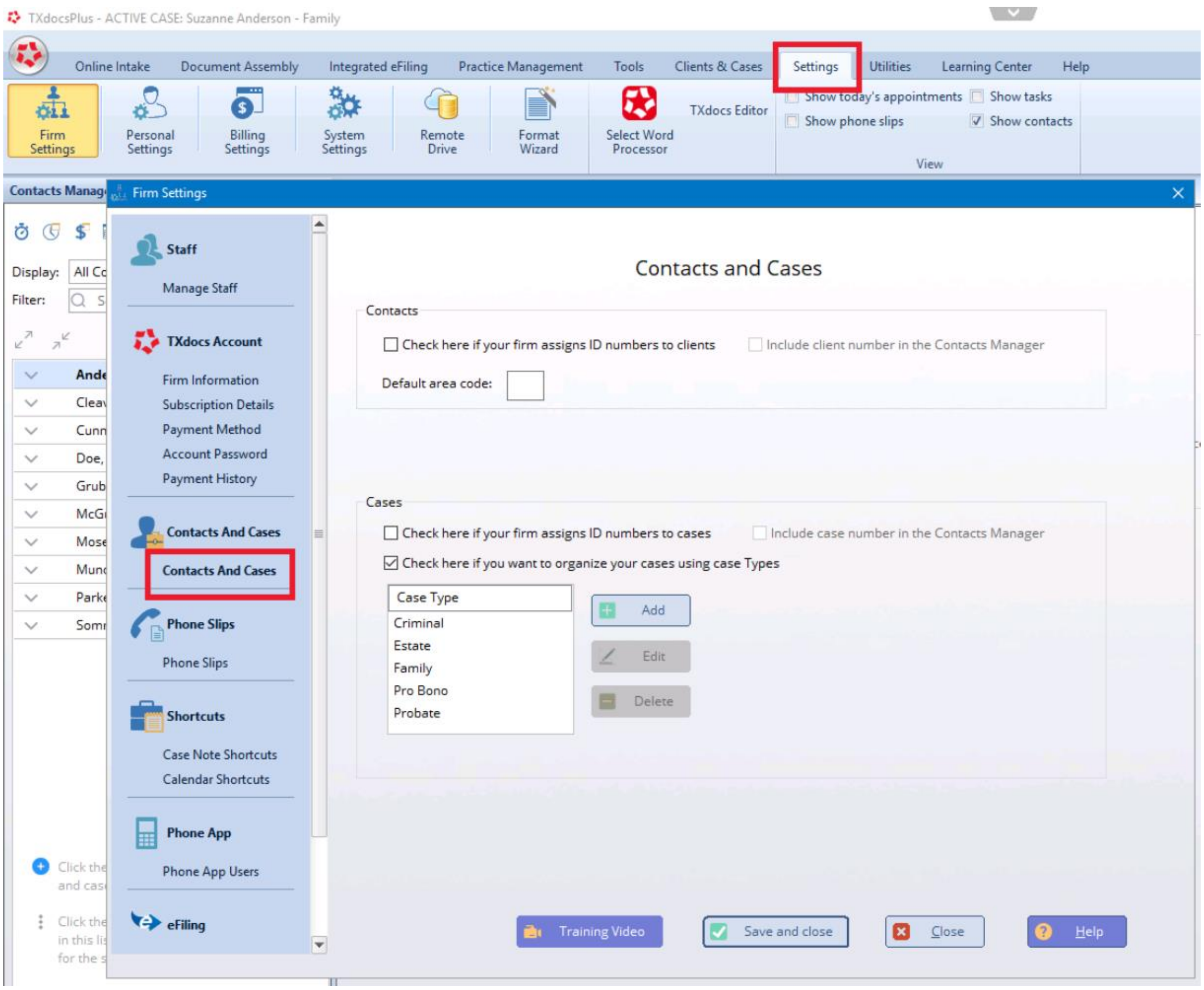
5. Filter by case type

Use this option to filter cases based on case types that you



First, you'll need to activate the option to organize your cases using case types in Firm Settings.

Click on the "Settings" tab in the TXdocs top menu, then select "Firm Settings." From there, choose "Contacts and Cases" from the left-side menu.



In the "Cases" section, click the box next to, "Check here if you want to organize your cases using case Types."

Select the "**Add**" button to enter a Type Name.

You can set up as many case types as you'd like. You might add practice areas – Family, Probate, Real Estate, etc. You could include a second office location or designate a type for Pro Bono work. The choice is yours.

PREVIEWING AND GENERATING THE BILLS

When you're ready, click "Print Prebill Statements" to preview the bill, or "Generate Final Statements" to create the bill.