

## SETTING UP A MONTHLY/PERIODIC BILL

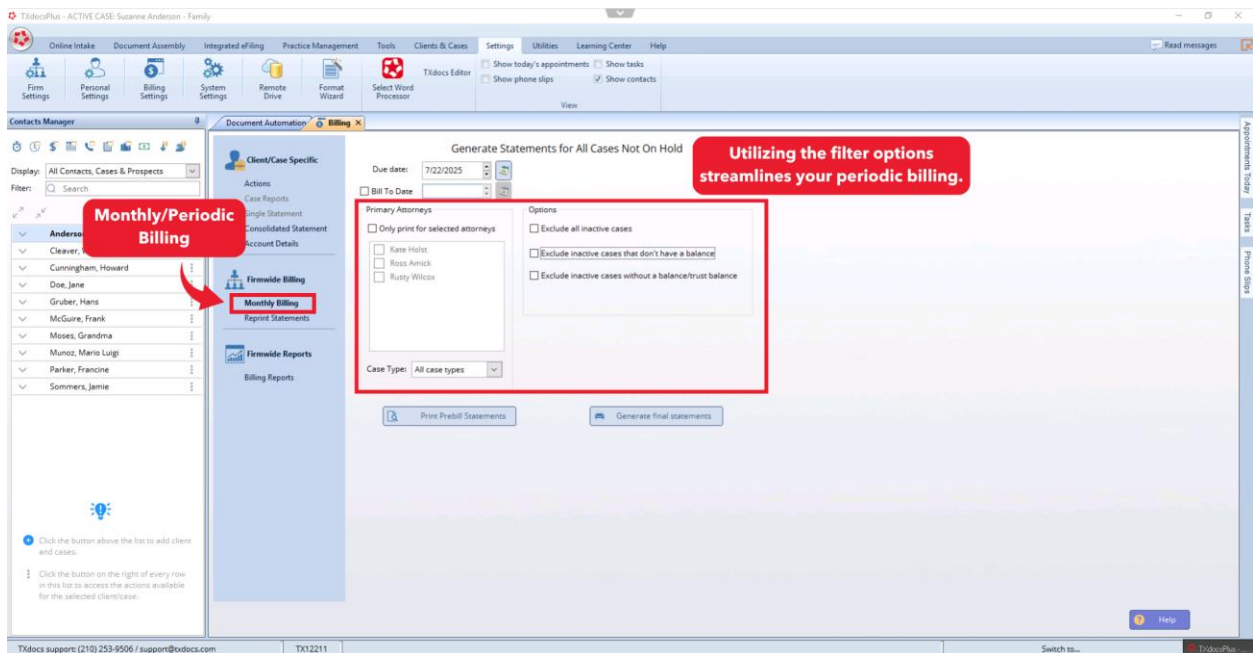
Learning about the filter options available when setting up a monthly/periodic bill will ensure that each bill is set up efficiently and precisely.

This document covers:

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

## MONTHLY/PERIODIC BILLING

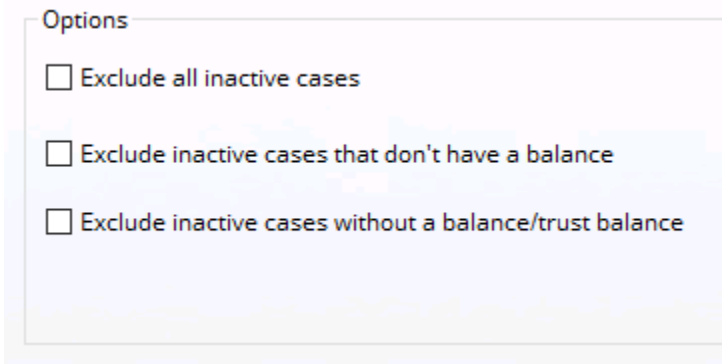
Though termed “Monthly Billing” in the Billing Manager’s side menu, you are not limited to billing only once a month. You can use the function to prepare periodic bills whenever you’d like.



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.



Options

- ☐ Exclude all inactive cases
- ☐ Exclude inactive cases that don't have a balance
- ☐ Exclude inactive cases without a balance/trust balance

**1. Exclude all inactive cases**

This option reduces the list by removing cases with no current billable activity.

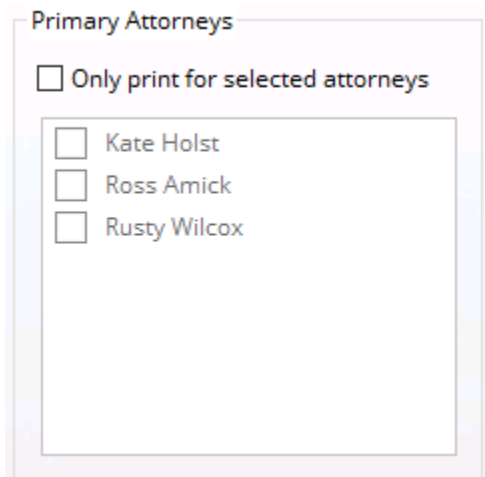
**2. Exclude all inactive cases that don't have a balance**

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**



Primary Attorneys

☐ Only print for selected attorneys

- ☐ Kate Holst
- ☐ Ross Amick
- ☐ Rusty Wilcox

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.

TXdocsPlus - No Case Selected

Online Intake | Document Assembly | Integrated eFiling | Practice Management | Tools | Clients & Cases | Settings | Utilities | Learning Center | Help

Calendar | Case Manager | Phone Slips Manager | Email Outbox | Task Manager | Deadlines Manager | Billing Manager | Training Video

Contacts Manager

Display: All Contacts, Cases & Prospects  
Filter: Search

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

Generate State

Contact Information Will Be Changed

☐ Business ☒ Client Primary atty: Kate Holst

First name: Suzanne  
Middle name:  
Last name: Anderson Suffix:  
Address:  
Type: Home  
Line 1: 896 Sir Lancelot  
Line 2:  
City: San Antonio State: TX Zip: 78216  
Phone: Home (210) 323-3748  
Email: Work SuzanneA@email.com  
Note:

Address:  
Suzanne Anderson  
896 Sir Lancelot  
San Antonio, TX 78216

☐ Consolidate statements - bill all cases for this client together  
☒ Use billing email address  
Email address for billing and/or LawPay:  
SuzanneA@email.com

If you would like to include multiple email addresses, enter each address separated by a semicolon, without a space.  
Ex: Support@TXdocs.com;Service@TXdocs.com

OK Cancel Help

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

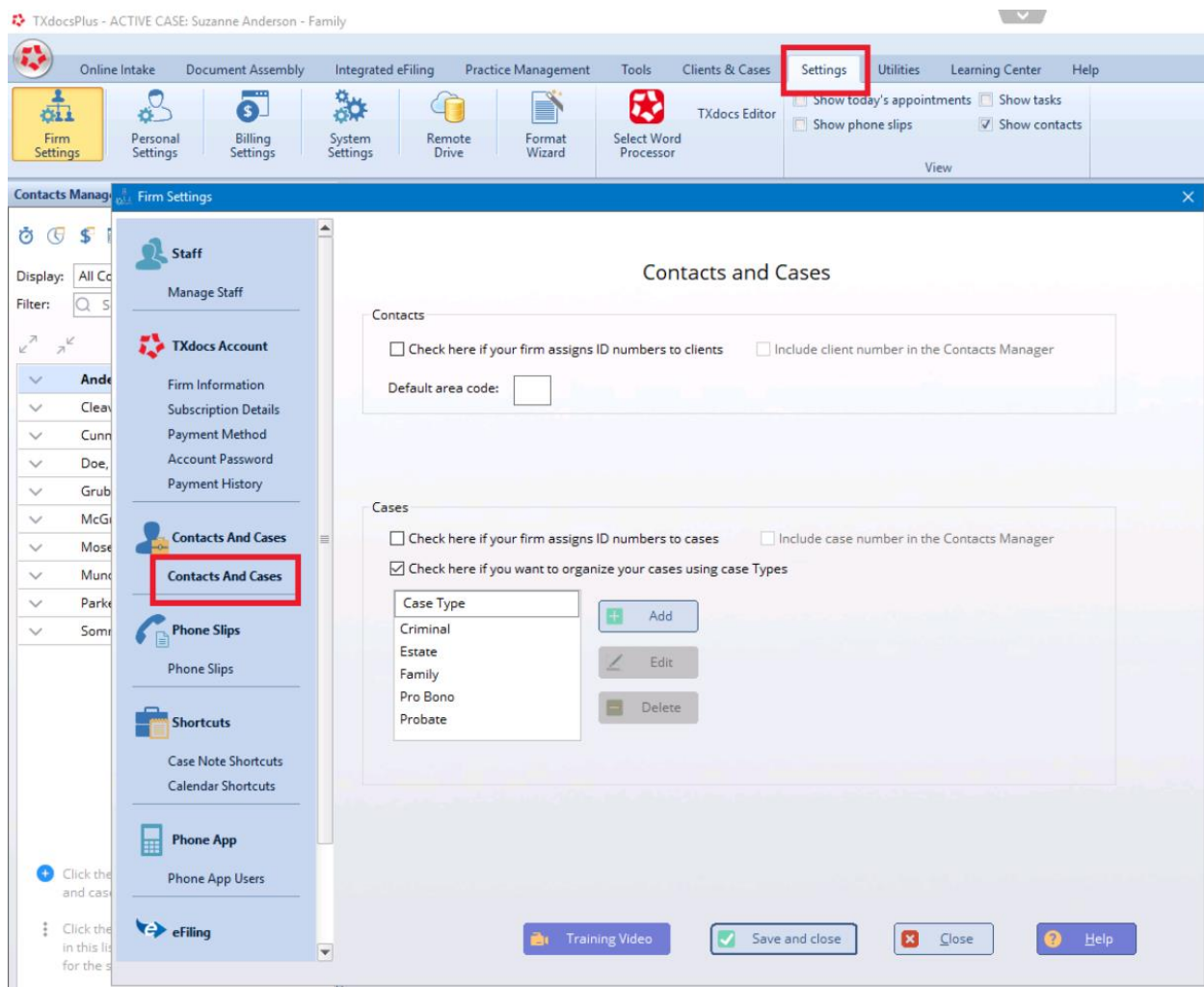
Case Type: All case types

All case types  
Criminal  
Estate  
Family  
Pro Bono  
Probate  
Retained

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.