

Clients:

The Clients Screen is used to open new clients, change information about existing clients and close clients.

For detailed instructions on Opening New Clients please refer to the next instruction "Opening New Clients". For detailed instructions on Closing Clients refer to "Closing Clients".

The screen is divided into two sections. On the left is the client list. On the right is either client information for existing clients or a blank screen for setting up new clients.

There are seven additional tabs or sub-screens for Clients. These are used as follows:

Balances: To enter balance forwards from your previous billing methods and to view Billed Statements.

Trust/Retainer: To enter Client Trust and Retainer Instructions.

Statement Options: To select Statement Address, if office uses more than one; to select Statement Due Date; to select Electronic Billing; and to enter a Statement message.

Duplicate Statement: To create duplicate statements for additional client who are sharing the payment of the statement.

Installment Billing: To enter an installment bill amount and to enter a Statement Message for the Installment amount.

Recurring Charges: To enter recurring statement charges or credits.

Notes: To enter notes on a client. No limit to how long or how many notes.

To Open a New Client: Check the next instruction "Open New Clients".

To Change Information about Pre-existing Clients: Search for or click on the client's name in the left section of the screen, the client's information will appear on the main right section of the screen. Use standard word processing cursor moves to backspace through or highlight and delete information to be replaced. Enter and save the new information. To change hourly rates, click on the rate and type over with the new rate. You will be asked if you want to recalculate unbilled entries for the client/matter. Change User (timekeeper) Names in the Setting Screen.