Opening a New Client

1. **On the CLIENTS screen:** Click "Open New Client" bottom left of the screen just above the close button.

2. **Name:** At the Top of the main part of the screen, enter the Client's name as you would like it to appear in client listings and drop down menus. We suggest Client's last name first (Adams, Waverly F.). For Businesses, use the business name as it is (Chevron Inc.).

3. **Opened:** This date is the date the file was opened. The date defaults to the current date but you can use any date**.** You will receive a warning when you try to save a future date but you can use a future date.

4. **Bill Day:** You can select any day and If you use Select Ready-to-Bill Clients in the statement screen those with unbilled and or unpaid charges with a past or current bill date will be selected.

5. **Bill Type:** From the dropdown menu, select:

    a. **Hourly** – An Hourly client is a client who is paying by the hour using either your default hourly rate or a special rate for this client's matter.

    b. **Contingency:** A Contingency client is a client for whom your fee is being paid out of the proceeds of any settlement you are able to secure for the client. Costs advanced are normally billed each month. When you select Contingency, a popup screen will offer to make all Timekeeper Hourly Rates Zero. Click Yes or No. Non-Chargeable clients will be separately itemized and sub-totaled on your Accounts Receivable Report.

    c. **Bad Debt:** Bad Debt clients are clients whose statements you no longer expect to collect. We suggest when you send statements to collections you change the Bill Type to Bad Debt. Bad Debt clients will be separately itemized and sub-totaled on your Accounts Receivable Report.

    d. **Deferred Payment:** Deferred payment Clients are clients from whom payment of your legal fee is dependent upon some financial event like the sale of property. Deferred Payment clients will be separately itemized and sub-totaled on your Accounts Receivable Report.

    e. **Non-Chargeable**: Non-Chargeable clients (sometimes called ProBono clients) are clients from whom you do not expect to collect a fee. You might charge and collect costs advanced, but not fees. When you select Non-Chargeable, a popup screen will offer to make all Timekeeper Hourly Rates Zero. Click Yes or No. Non-Chargeable clients will be separately itemized and sub-totaled on your Accounts Receivable Report.

    f. **Flat Fee**: A Flat Fee client is a client for whom you have quoted a flat fee to do all work on the file. The Flat Fee does not usually include costs advanced which are billed separately on each client statement. When you select Flat Fee, a popup screen will offer to make all Timekeeper Hourly Rates Zero. Click Yes or No. (For other Flat Fee instructions - See How to Setup a Flat Fee).

6. **Frequency:** From the drop down menu, select Monthly (default), Quarterly, At a Dollar Amount, On Request.

    a. **Monthly:** Selecting Monthly, with the Bill Day, will create a statement on the appropriate month/day (or after), when you click Ready-To-Bill Clients in the Statements screen.

    b. **Quarterly:** Selecting Quarterly with Bill Day will create a statement on the appropriate quarter /day (or after), when you click Ready -To- Bill Clients in the Statements screen.

    c. **At A Dollar Amount:** When selected, a new entry field will appear to the right of the Frequency field. Put the amount you would like the bill to reach before it is selected to be billed. A common amount is $300. When you click Ready –To Bill Clients in the Statement screen, the statement will be billed when balance due the dollar amount.

    d. **On Request:** Selecting On Request statements will create a statement only when you select the statement in the Statement screen.

7. **ID:** The Client ID is normally a number. When you use a number like 1000, the system will automatically default to numbers in order. So the next number would be 1001. You can use the Clients name. In that case, no ID will be suggested for the next Client.

8. **Late Charge:** The default late charge is set in "Settings"**,** but you can change it for any client. Normally a law office does decide as a policy on whether to charge a Flat Late Charge Fee like $25 or a percent either computed annual (the norm) or monthly. Usually the percent is standard for all clients, but applied only to certain clients.

9. **Contact Info:** Enter the Clients addressee name and address lines the way you would like them to appear on the client's billing statement from your office.

    a. **Addressee:** Enter the client statement addressee line: e.g. Mr. Madison F. Waverly, Vice President.

    b. **Address 1:** Enter the first client statement address line: e.g. CompuDynamics Inc.

    c. **Address 2:** Enter the second client statement address line: e.g. Frontier Building.

    d. **Address 3:** Enter the third client statement address line: e.g. 1400 Seminole Blvd.

    e. **Address 4:** Enter the four client statement address line: e.g. Dallas, Texas 77201

(**Note:** Not many addresses are five lines with Addressee , use only the number of lines you need and enter the city state and zip on the last address line you use lines 2, 3 or 4.)

10. **Phone Numbers:** Click add button on right to add and highlight entry and click delete button to delete.
    <name> is first: You can enter Madison F. Waverly right over <*name*>.
    <phone number> is next: You can enter 214.674.9876.

11. **Email Addresses**:

a. Click add for popup to enter.
b. Enter Contact Name, e.g. Madison F. Waverly over <*name*>.
c. Enter email address e.g. MWaverly@ChevTex.com over <*email address*>
d. Check if you want to Email statements to this contact.

12. **Matters:** Most offices have only one matter per client. This instruction is for one matter per client. (There is a separate instruction How To Use Multiple matters).

    a. **Matter Name:** When you open a new client the words "Default Matter" are entered into the Matter name. You should delete that and change this to a Matter Name that makes sense, like "Dissolution", "Contract Negotiations", "Corporate", "Vs. Jones", "Adv. Jones" etc.
    b. **Matter ID:** Will default to 0001, you can change that numbering system if you want.
    c. **Practice Area:** (optional) You can establish Practice Areas in **Settings / Client Settings** or you can click on the +button and create a new practice area while you are in the **Clients** screen.
    d. **Description:** (optional) If you would like to add an additional Matter Description, enter it here. It can also be a Court Docket Number, Insurance Company Identification Number, or more particulars about the matter.

(The tabs Balances, Trust/Retainer, Statement Options, Dup. Statement, Installment Billing, Recurring Charges and Notes are dealt with in separate sections.)

End Opening a New Client 12/7/15