Billing Groups:

Billing Groups are usually used in multi-attorney firms so one attorney can bill just their clients without individually selecting those clients for each billing. Billing Groups are also used to bill a group of clients each week, bill a large client with multiple matters or to bill a group more than once a month.

Setting up and Administering - Billing Groups:

*Go to Settings then to Client Settings. Second column bottom you will see Billing Groups.
*To add a billing group, press the ADD button. Enter Group Name after Name: Second line.
*You will see that you can move clients into a billing group on this screen.
Add Clients or Remove clients from a Billing Group and Save.
(If more convenient, you can also move and remove clients from a Billing Group on the Clients Screen Tab Statement Options under the billing options drop down.)

*Deleting Billing Groups. In Settings, Client Setting you can Delete a billing group. Select Billing Group, Remove all clients and Press the Delete button.

Billing - Billing Groups:

Go to the statement screen (default Create Statements Tab). Select Statement Date. Press Select Billing Group. Select the billing group you want to bill (one at a time) then select Select Ready To Bill (bills only statements within the billing group with unbilled activity and [if you select] unpaid previous balances) or Bill All Statements. If emailing all or some of the Billing Group statements, click Email Statements (yellow highlight). Click Bill Selected Clients.

After Billing:

Whether you are billing clients, in groups or not, the after billing process is the same.   Once Client Statements are produced by email or PDF, the Statements are available for rebilling, redrafting, viewing and printing in the Billed Clients Tab. You can search for any statement going back to the year 2000 in this screen.

End - 7/13/21