Clients: (screen):

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

The screen is divided into two sections. On the left side is the client list which can be arranged in Client Name or Client ID order by clicking on each column header. The right side displays Client information on clients selected on the left side. It can be used to view and edit pre-existing client information. The right side can also be used to Open A New Client.

To Open A New Client:

Click Open New Client (bottom left side): You will create a blank screen.

Name: (main screen top left) Enter the Client's name, last name first or entity name.

Bill type: Unless this client is other than Hourly, leave Bill Type as Hourly. If not, click the down arrow and select another Bill Type**.**

ID: Each client is assigned a client Id automatically the next available number. If you want to use a different ID identification scheme you can use anything including the client's name, just enter here. You can change a Client ID at any time and all billing data billed and unbilled will be moved to the new ID.

Late charge: (Optional) If you use Late Payment charge to charge a percent of the balance due annualized or a fixed amount, the default is created in Settings. You can change the percent including 0% for each client.

Contact Info.: Enter the Client's name and address exactly the way you want it to appear for mailing on the bill. If you will be emailing the billing statement, it is a good idea to at least fill out the Addressee.

Matter: Enter the Name of the matter: E.g. Estate Planning, Dissolution, Post Judgement Matters etc. In this data area, there is space to further describe the matter including case numbers, court numbers etc.

Matter Rates: Each user has a default billing rate in which will appear here. If you want to change that rate for this client, double click on the default rate and change it. You will be asked if you want to recalculate unbilled entries.

Phone Numbers: Name first, Number Second. You can enter as many as you want.

Email Addresses: Name First, Email next and click email statement for each email address to receive a copy of the statement.

Save: Be sure to save.

To Change Client Information:

Select the client: (left screen panel) client information will be displayed on the main right screen panel.

Change any information and **Save**

Inactivating a Client: (Inactivating merely marks a client as Inactive, you can reactivate at anytime.)

No billings are lost, no balance due or unbilled. everything stays the same, except that the client no longer appears in drop downs to reduce clutter.

Click Inactivate This Client (bottom screen right). A dialogue box will ask you if you are sure and you respond Yes.

Reactivating A Client:

Second data area from bottom says Active Clients with the number of Active clients click the down arrow and select Inactivated clients. The left side of the screen will populate with Inactivated clients (text in rust color).

Select the client you want to reopen.

Click the last button (left screen panel) Reactivate This Client.

Respond Yes to the dialogue box.

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

Balances: Used 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.

End