How to Batch Invoice

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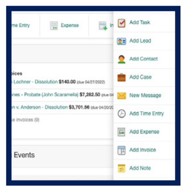
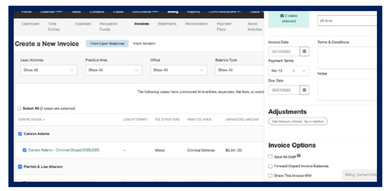
This is just a quick instructional guide on billing a client. When it's the end of the month we send out bills to all clients who are on an hourly fee agreement and deduct the cost of the invoice from their trust balance. Follow the steps below to see how to keep that process ticking along! You can also watch this guide here: *joneslawcolorado.com/dashboard*

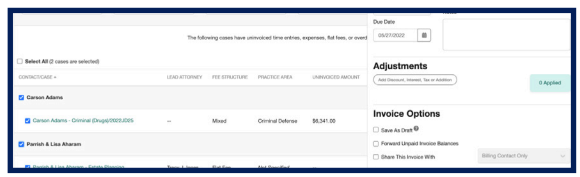
Steps to Follow

- Click add item and add invoice. Now scroll through this list and select all the cases to bill.

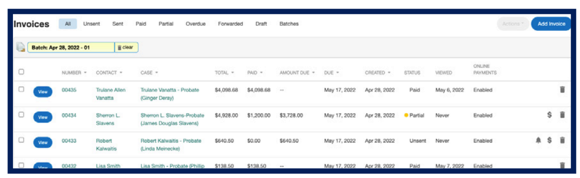




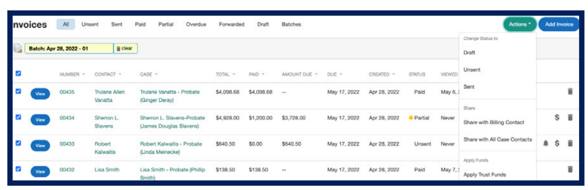
- Using the tab on the right chose what you want to apply to each (online payments, trust, etc)



- Once you click create invoices you'll be taken to the batch you created & be able to edit/send them.



- Download as a pdf and print all for Tracy to review and then update the changes individually!



- That's that! Good job!

Concluding Thoughts

Make sure to generate invoices for only those accounts that need them. At the end of the month we don't need to bill flat fee cases (criminal/estate planning). If you do it will cause confusion (just trust me on this). Also, make sure that the payments into the invoice are into the operating account - an invoice should NEVER be paid into the trust account.