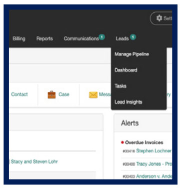
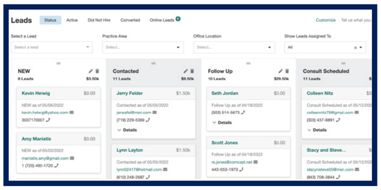
How to Invoice a Lead

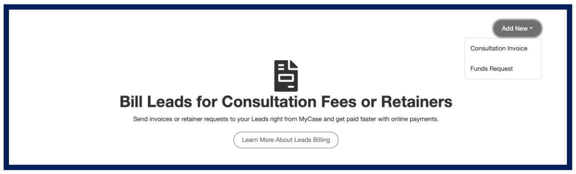
This is just a quick instructional guide on billing a lead. Leads often need to be billed for consultations before a case starts or even want to pay a retainer before we've sent them a retainer agreement. Follow the steps below to see how to keep that process ticking along! You can also watch this guide here: *joneslawcolorado.com/dashboard*

Steps to Follow

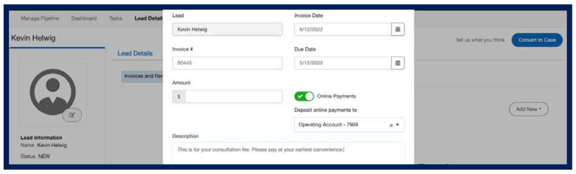
- Click leads and then click the lead to bill. The last tab along the top is billing, click it!

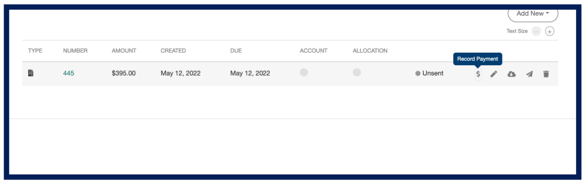
- Click add new, and then chose either a consultation invoice or a funds request.



- Make sure to write a good description and send the request to the right client.



- You can either send it then and there or accept payment in person and enter the card details yourself.



- That's that! Good job!

Concluding Thoughts

When sending out these consult invoices or retainer payments keep in mind the client will need to sign a fee agreement when they come onboard. Don't let this paper over that step!!