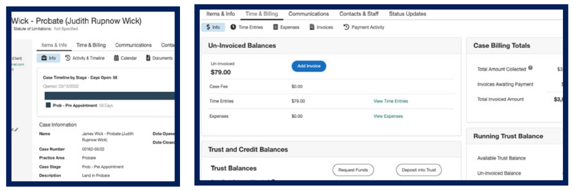
Taking Trust Payments

JONES LAW OFFICE, LLC

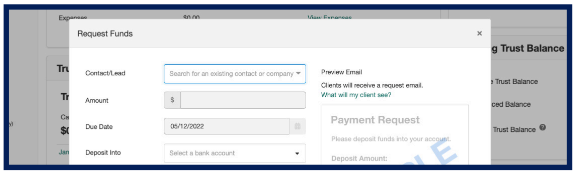
This is just a quick instructional guide on sending a request for a trust payment. When we have an hourly case we bill to a retainer which the client will have to replenish throughout the case. When we take a trust payment it goes into an account we ethically can't touch and so should only be done so at the correct times. 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

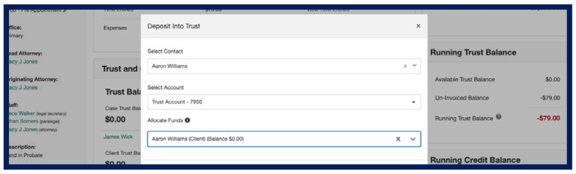
- Navigate to a client profile and click time & billing. You'll then scroll to "Trust and Credit Balances"



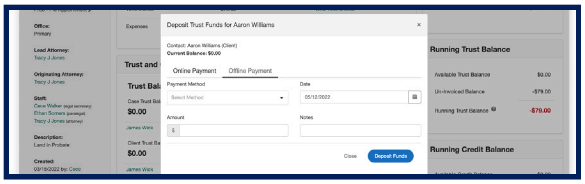
- Click request funds and then enter the correct client name and the amount to request.



- OR click deposit into trust for a payment in person, select the client, case, and how much to charge.



- Note: If there is a check they pay with or cash use the offline payment method & make a short note!



- That's that! Good job!

Concluding Thoughts

Trust payments are so important to get right and so easy to mess up! The major issue I've had around the office is normally taking payments that should be operating payments as trust payments so a quick rule of thumb to work out when a payment is a trust payment: have we done the work to earn this money yet? If the answer is no, it should be a trust payment!