Billing Groups (Creating)

You can bill by Billing Group. A Billing Group is typically a set of statements billed together—usually at one time—for a Billing Attorney or for a large client.

To set up a Billing Group, go to **Settings** → **Client Settings**. At the bottom left of the second column, you will see **Billing Groups**.

To add a Billing Group, press **ADD**. Enter the Group Name in the highlighted area after **Group Name:** and click **Save**.

Billing Groups (Assigning)

To add clients to a Billing Group, select the established Group Name and press **Edit Members**. Highlight and move clients from left to right to assign them to the Group.

When opening a new client, you can assign the client to a Billing Group in the **Client Screen**. Select the **Statement Options** tab, and on the right side you will see **Billing Groups**. Choose the correct group and save.

Billing Groups (Billing)

Go to the **Statement Screen**, select the **Statement Date**, then press **Billing Group**. Select the Billing Group you want to bill (one group at a time). Press **Select Ready to Bill**—this bills only statements within the group that have unbilled activity.

If you want to include **Balance Only** or **Trust/Retainer Balance Only** statements, click **Yes** when prompted.

If emailing all or some of the Billing Group statements, select **Email Statements** (yellow highlight). Finally, press **Bill Selected Clients**.

Billed Statements

In the **Statements Screen**, select the **Billed Statements** tab. You can search for any statement. Statements billed by Billing Group are batched and captioned by Group.

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