Clients Screen

Open, Changing, Inactivating and Deleting Clients

Open New Client: Bottom screen left, press **Open New Client**. Name is a short name which appears on drop downs in the log and other forms. Suggest Keep it short, Last Name, First name or Corp Name Example: Jones, Samuel; ABC Corporation. If you use ID, accept the system assigned ID or include your own. You can use a name for ID. When you open a new client, you can duplicate data from a pre-existing client and perhaps change it slightly like a matter name. Press **Duplicate Client Info** and select the client from which you want to duplicate client info.

Hourly Rates: Usually, you will have a default hourly rate, enter any changes to that default rate on a per user basis. You will be asked if you want to recompute any Fee entries twice and respond yes to both.

Optional: **Late Payment Charges; Telephone:** To use complete.

Email Addresses: Not optional if you are emailing statements.

Press **Statement Preview**: to see how the new statement will appear.

Additional Tabs: Select the Balances tab to enter client starting balances and to view past client statements. (you can also view past statements in Statements/Billed Statements Screen).

Other tabs have their own Help Page: Trust/Retainer, Statement Options (including Statement Messages) Duplicate (different client) Statements, Installment Billing, Recurring Charges, and Notes (unlimited for each client).

To change client info including Id: Top screen left, search and select client, change any information. To change the Id, you will have to enter a statement that you understand the impact.

To Inactivate a client: Top screen left, search and select client. Bottom screen right press **Inactivate This Client**.

To **reactivate a client**: Top screen left, select **Inactive Client** tab. In Inactive Clients (**client names ID in red**) Search and select client. Bottom screen left, **press Reactivate This Client.**

To (permanently) **Delete** a Client (use only if the client accidently opened and never billed), Top screen left, select **Inactive Client** tab. In Inactive Clients (**client names ID in red**) Search and select client. Bottom screen right, press Delete This Client (you will be asked to type a statement to verify you understand the impact of deleting a client.

End