

## Bill Design Bliss

Prepared by

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### Course Information

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|------------------|---------------------|
| Prerequisite     | None                |
| Field of Study   | Law Firm Management |
| CPE Credit Hours | 1                   |

### Author Biography

Kathy has worked with Juris for over 20 years providing guidance, business consulting, training, and accounting consulting to law firms across the United States and Puerto Rico. Kathy is a Senior Consultant with LexisNexis and worked with Juris when it was still an independent company prior to acquisition by LexisNexis in 2007. She has specialized knowledge in Billing, Electronic Billing, Law Firm Accounting and is an expert in Juris/Juris Suite software. She has become a trusted advisor to and assisted hundreds of law firms across the country in developing the best business workflows and unique solutions for her clients.

### Course Description

One of the most important tasks for today's law firms is timely delivery of a client bill and prompt payment. The trend today for law firm clients is the desire and need for transparency in billing. Clients are demanding that a firm's bills be clear, concise, and easy to read or understand. Research has shown that clients pay their bills more promptly and with fewer challenges and questions when the Bill Designs are simple, personalized and easy to read. With stellar Bill Designs it becomes clear to the client as to what work was done and its value to them or their company.

This course will cover Best Practices in how to use the Bill Designer in Juris to create the perfect Bill Design for the firm's clients, whether they have an Hourly, Flat Fee, or Retainer Billing Agreement.

### Learning Objectives

Upon successful completion of *Bill Design Bliss*, the user should be able to:

- Make use of the Layout, Section and Field Properties to change margins, prebill selection options, prevent "widow" lines, print headers, group details and add totals/sub-totals, consistently align fields, choose the verbiage for No Charge entries, and more.
- Use the "Lasso" technique to select multiple fields for alignment, sizing, and font selection.
- Add Sub-sections such as A/R Open Items, Expense Code Recap, Fee Recap, Itemized Payments, Task Code Recap or Trust Ledger History information to the design.
- Take advantage of Client and Matter Billing Fields which allow data input on the fly while in prebill editing.
- Format fields and sections on the design.
- Create Summary Bills using the "Summary Text" field.



- Determine which pre-calculated fields to use for Totals on the design.