

Billing – Functionality and Workflows of Email/Export Bills in Juris

Prepared by

Kathy Baker-Elder, Sr. Consultant

Course Information

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

In the past, most legal bills were printed on the firm’s nice letterhead stationary and mailed to the client. Today, more and more clients are requiring law firms to submit bills either electronically, or to provide them with a PDF version of their bill via email. In a service-related business such as the practice of law, being able to meet client demands is a critical part of a successful attorney-client relationship. Law firms can shorten the “work to cash” cycle of their business by accommodating these client requests, as it results in more timely payment for fees. The Email/Export Bills function in the Juris software is an under-utilized tool that a firm can use to more efficiently meet these client demands.

This course will demonstrate how to use the Juris Email/Export Bills function to create and email PDF versions of client bills and increase the firm’s agility in responding to their client needs.

Learning Objectives

Upon successful completion of *Billing – Exporting/Emailing Bills – How to and Workflows*, the user should be able to:

- Designate the Matters in Juris as recipients of an Emailed or Exported copy of their bill.
- “Mass export” client bills for further processing.
- Email bills directly from Juris.
- Save time by learning and implementing a workflow that would eliminate the need for scanning bills to create a PDF version.
- Learn how to use a 3rd party PDF Writer software to create PDF versions of bills.