

## Billing - Preparing and Finalizing Bills

### Overview

This document details how to print and finalize bills within CMPOnline. This is an essential process that allows for ensuring accuracy before moving any bills from the Unbilled section to the Billed section.

### Viewing Unbilled Items

To start, we'll look at the currently unbilled items within a case file. To do this, we'll navigate to Case File > Financial > Billing > Unbilled.

Before continuing, we can edit any current bills or add bills using this screen now.

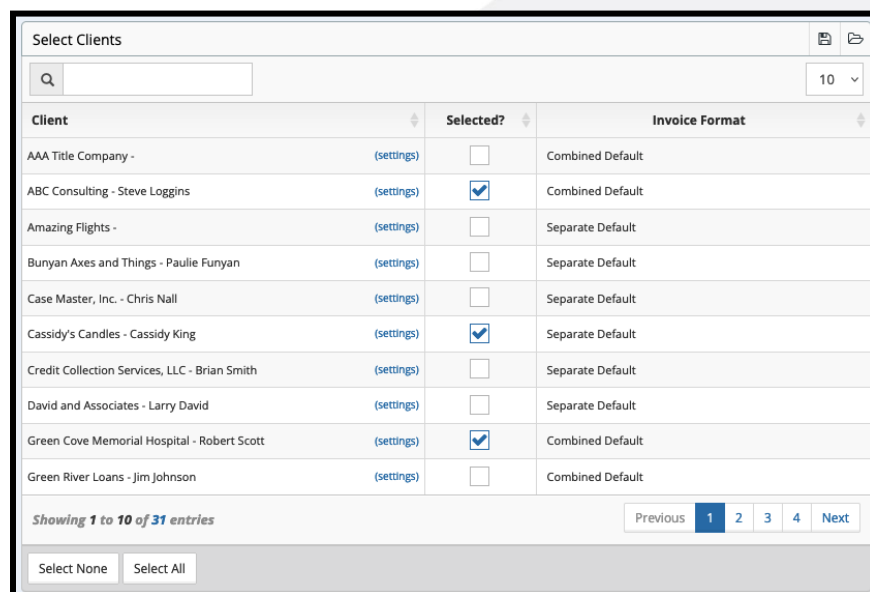
### Selecting Bills

To begin printing the bills we viewed in the Viewing Unbilled Items section, we'll navigate to Accounting > Billing > Print Bills.

From here, we'll select the criteria by which we want to run the bills. **Note that if we do not select any criteria, the application will prepare bills for all clients and all service codes.**

To select criteria though, we have several options.

First, we can select specific clients whose bills we wish to print by selecting their checkboxes like so.



Client	Selected?	Invoice Format
AAA Title Company - (settings)	<input type="checkbox"/>	Combined Default
ABC Consulting - Steve Loggins (settings)	<input checked="" type="checkbox"/>	Combined Default
Amazing Flights - (settings)	<input type="checkbox"/>	Separate Default
Bunyan Axes and Things - Paulie Furryan (settings)	<input type="checkbox"/>	Separate Default
Case Master, Inc. - Chris Nall (settings)	<input type="checkbox"/>	Separate Default
Cassidy's Candles - Cassidy King (settings)	<input checked="" type="checkbox"/>	Separate Default
Credit Collection Services, LLC - Brian Smith (settings)	<input type="checkbox"/>	Separate Default
David and Associates - Larry David (settings)	<input type="checkbox"/>	Separate Default
Green Cove Memorial Hospital - Robert Scott (settings)	<input checked="" type="checkbox"/>	Combined Default
Green River Loans - Jim Johnson (settings)	<input type="checkbox"/>	Combined Default

Showing 1 to 10 of 31 entries

Previous 1 2 3 4 Next

Select None Select All

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We can then further select specific Types to bill using the right side grid similarly.

Select Types to Bill

Q 10 ▾

Type	Code	Description	Selected?
AF	CT	Attorney Fees - Contingency	<input checked="" type="checkbox"/>
AF	FE	Attorney Fees - Firm Expenses Retained	<input type="checkbox"/>
AF	HR	Attorney Fees - Hourly	<input checked="" type="checkbox"/>
AF	MS	Attorney Fees - Misc	<input type="checkbox"/>
AF	NC	Attorney Fees - Non Contingent	<input type="checkbox"/>
AF	OC	Attorney Fees - Outside Counsel Fees	<input type="checkbox"/>
CF	CL	Client Funds - From Client	<input type="checkbox"/>
CF	MS	Client Funds - Miscellaneous	<input checked="" type="checkbox"/>
CF	RC	Client Funds - Refund Costs Firm Pd	<input type="checkbox"/>
CF	RF	Client Funds - Refund	<input type="checkbox"/>

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Select None Select All

If you wish to then filter these bills further, we can select More Options above to filter by Case File Default User, Resp. Attorney, Account Executive, and/or Bill Through Date.

Lastly, seen in the screenshot below, we can enter a file number to print all bills currently on a file. We can do this by entering the file number here.

NOTE: Enter a File Number to bill, or select clients and / or service types to bill. If you do not select any criteria, the application will prepare bills for all clients and service types.

File Number: 20230001 Invoice Date: 06/17/2023 More Options (billing hold listing) Print Bills

Select Clients

Q 10 ▾

Client	Selected?	Invoice Format
AAA Title Company - <a href="#">(settings)</a>	<input type="checkbox"/>	Combined Default
ABC Consulting - Steve Loggins <a href="#">(settings)</a>	<input type="checkbox"/>	Combined Default
Amazing Flights - <a href="#">(settings)</a>	<input type="checkbox"/>	Separate Default
Burman Axes and Things - Paulee Furryan <a href="#">(settings)</a>	<input type="checkbox"/>	Separate Default
Case Master, Inc. - Chris Nall <a href="#">(settings)</a>	<input type="checkbox"/>	Separate Default
Cassidy's Candles - Cassidy King <a href="#">(settings)</a>	<input type="checkbox"/>	Separate Default
Credit Collection Services, LLC - Brian Smith <a href="#">(settings)</a>	<input type="checkbox"/>	Separate Default
David and Associates - Larry David <a href="#">(settings)</a>	<input type="checkbox"/>	Separate Default
Green Cove Memorial Hospital - Robert Scott <a href="#">(settings)</a>	<input type="checkbox"/>	Combined Default
Green River Loans - Jim Johnson <a href="#">(settings)</a>	<input type="checkbox"/>	Combined Default

Showing 1 to 10 of 31 entries

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Select None Select All

Select Types to Bill

Q 10 ▾

Type	Code	Description	Selected?
AF	CT	Attorney Fees - Contingency	<input type="checkbox"/>
AF	FE	Attorney Fees - Firm Expenses Retained	<input type="checkbox"/>
AF	HR	Attorney Fees - Hourly	<input checked="" type="checkbox"/>
AF	MS	Attorney Fees - Misc	<input type="checkbox"/>
AF	NC	Attorney Fees - Non Contingent	<input type="checkbox"/>
AF	OC	Attorney Fees - Outside Counsel Fees	<input type="checkbox"/>
CF	CL	Client Funds - From Client	<input type="checkbox"/>
CF	MS	Client Funds - Miscellaneous	<input type="checkbox"/>
CF	RC	Client Funds - Refund Costs Firm Pd	<input type="checkbox"/>
CF	RF	Client Funds - Refund	<input type="checkbox"/>

Showing 1 to 10 of 54 entries

Previous **1** 2 3 4 5 6 Next

Select None Select All

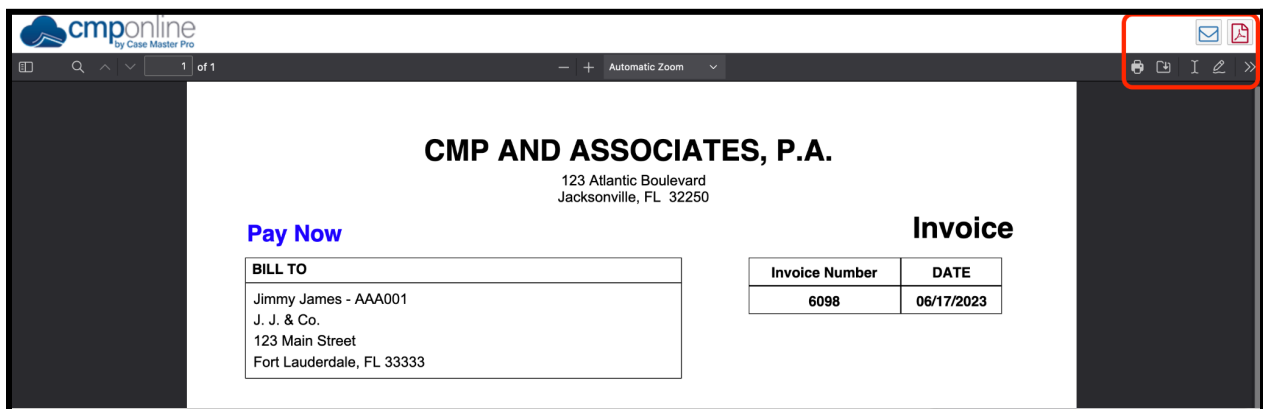
## Billing - Preparing and Finalizing Bills

### Printing Bills

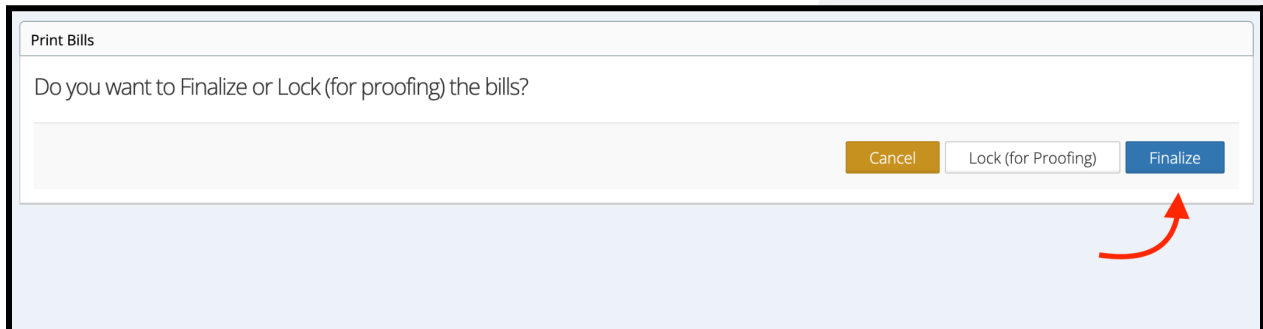
Once you have your criteria selected, click on the Print Bills button in the upper right of the Accounting > Billing > Print Bills screen.

Once printed, a new window will appear. In this window you can review the bills for accuracy.

Also on this screen, we can physically print the bills, save them to our computer, email them through CMPOnline, and/or save them to imaging as a PDF.



Once bills have been reviewed for accuracy and saved if needed, we can close out of this window and move back to our main CMPOnline window.



If any bills printed needed to be edited, we can click Cancel and then edit and repeat this process. If all bills were accurate, we can click Finalize as seen above.

## **Billing - Preparing and Finalizing Bills**

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Once finalized, bills will be moved from the Unbilled section to the Billed section of the application and then will be ready to be paid.

### **Questions?**

**support@casemasterpro.com**  
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