

Do you hate the 1st of the month because of billing?

I just loath the first day of every month because I hate billing, even when I don't do it. I still must review all time entries, update or correct, and make sure the work matches the calendar and emails/receipts. I hate it!!!! Even if we switched to flat fees, which does not appear to be possible based on our client responses, I will still hate billing day.

If I wanted to be an accountant, I would have had an aptitude for numbers but I didn't and don't. Anyone else hate billing as much as I do (even though it represents getting paid)?

Thanks for letting me vent. Can't wait for the 2nd.

Sounds like a lot of work "proof reading" before you actually get to bill.

Why do you find you need to "make sure the work matches the calendar and emails/receipts?" Does it often not match?

Just off the cuff, I'd want to look at what it is that is keeping you from just printing and mailing on the 1st. If you really find that you cannot trust the entries, and have to go back and doublecheck everything, then there is a problem with the input side of things. You should have a lot more confidence that the entries were put in right the first time and just have to make minor changes when time to bill.

Hard to say more based on your initial statement. But happy to help! :-)

Nancy Duhon, Georgia

I also use Clio and do the same process as Deborah although maybe slightly different. Clients A-M have bills that go out on the 1st of the month, Clients N-Z have bills that go out on the 15th of the month. I have found that it helps a steady cash flow, forces me to keep up on my accounting and I don't have an overwhelming day once a month of trying to get everyone's bills out.

Andrew Ayers, New York

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I use Clio for billing. I bill twice a month, on the 1st and 15th. It takes less than an hour and most of my clients receive their bills via email.

Deborah Hardin

I hate billing day. I know I shouldn't but I do.

I print pre-bills, that all three time keepers review. Printing takes 10 minutes, the review process can take each time keeper up to as much as an hour. Then we run final bills, that takes a bit longer because our admin assistant has to name each bill as it "prints" to PDF.

So, for my actual time in billing, I probably spend one to two hours. It's not the time, it's not really the process, I just don't like doing it. I'd rather be practicing law!

David Masters, Colorado

Ditto. I hate billing day. Almost as much as I hate doing the taxes (even though I have a bookkeeper and a CPA). I find myself doing more contingency fee litigation and I seem to prefer that payment arrangement.

David B. Newdorf, California

Thanks for sharing the Clio love, Andrew and Deborah! Glad to hear we've helped to at least take some of the pain out of your billing process. If there's anyone else in this thread who has questions about Clio's billing features, please feel free to ask me directly or watch this video outlining our billing functions: <http://vimeo.com/46252515>. Friendly reminder: we offer a completely free trial if you're looking for an easier way.

Derek Bolen (not an attorney)
Social Media and Communications Coordinator
Clio - Practice Management Simplified

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I'm with you. I hate billing....though it tends to take me several days so I'm definitely doing something wrong!

Shell--PLEASE share your methods with me. How in the world does it only take you an hour?

Thank you,

Letisha Luecking Orlet, Illinois

I am with Shell on this one – billing takes almost no time at all – usually less than an hour each month and that is only because clients want updated spreadsheets with running monthly totals and the like.

I use QuickBooks for time keeping and for billing (I did customize the look of the bill so it does not look like your usual QuickBooks standard invoice).

WDJiii

Walter D. James III, Texas

Not at all. Billing is my second favorite day of the month. Checks arriving is my first. Seriously, it sounds as if you need to improve the efficiency of your time entry/billing method. Billing takes me one hour, max.

Shell Bleiweiss, Illinois

We rotated our billing date to the 20th so our bills get there before everyone else who bills on the first. It has made the payments come more quickly from smaller clients. To the businesses who put the invoices into the computer and then pay them on the 25th day after they are entered, it doesn't matter when you bill them, you get your money 29 days later to avoid the service charge the computer adds but we often don't collect "as a courtesy to our good clients"

John Miles

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Well, I'm happy for you, Shell, but you have one practice with I don't know how many clients. My paralegal service supports over 50+ practices, many with multiple attorneys, that EACH have 100 to 500 clients and their respective trademark/copyright/dispute/licensing portfolios. The work must be billed per practice/attorney/client/trademark or dispute, etc./per matter in as much extreme detail as we can muster so they can bill our time.

Occasionally, the time gets recorded but the description of the work gets recorded later in the day or on the following day. It must be accurate. It cannot be guessed. I also am buck-stops-here for multiple paralegals on occasion. I will often reduce/adjust what I am billing the client based on what the work SHOULD have taken them to do, yet keep our own records intact for what they spent and will get paid for doing due to multiple learning curves. And in addition to the main PDF bill, we also provide Excel spreadsheets of the work so that our attorneys can easily copy and paste into their own invoices to bill our time. Even with my bookkeeper, she does not know the work performed so it's on me. I have a great timekeeping/billing system but it still takes time to bill. I love getting paid but hate billing day.

Lyza Sandgren (not a lawyer), Georgia

Me too, so I started billing on the 20th each month and somehow it isn't as bad, it doesn't feel so much like a deadline. Hasn't changed people's payments to me though.

Nanci Bockelie

That's a very interesting idea, John. I must ponder that. Thx.

Lyza Sandgren

Shell, what is your system that takes only one hour? Sounds pretty good to me.

John J. Genova, New York

Since I started the thread, I feel compelled to explain that I love my Harvest time tracking and billing software, which is robust in features, efficient, user-friendly and VERY cost effective. My intention was not to look for other systems but only to share the one part of owning a business that I just don't enjoy and to see if I was not alone. I appreciated all

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the offerings but was not looking for help with better practices or other software. I was having an angst-riddled day, as I do most every first day of the month, and thought I would commiserate with other accounting-haters.

I tried Clio, QuickBooks Online, and several others, but Harvest was way easier, more intuitive, feature-rich, and user-friendly, and CHEAPER. End of participation. Y'all can take this further in whatever direction you want to go. Thx.

Lyza Sandgren

The first day of the month is the most important day of the month. That is when my bills go out. Unless they go out I don't have a chance to get paid.

If you dread it, then you are doing something wrong. I keep all of mytime in a computer spreadsheet. At anytime during the year that I want tosee how I am doing, all I have to do is look at the billable hours and compare them month by month. That also keeps me on track to keep my nose to the grindstone. At the end of the year, when it is time to renew my malpractice coverage, all I have to do is to print out one tab on the spreadsheet and it is all done.

When I have money in escrow, the first day of the month is most important because that is when I can transfer money from the escrow account to the office account.

If it is a dreaded endeavor, then don't keep records or send out bills.

Frederick G. Irtz, II, Kentucky

"... then don't keep records or send out bills."

Wow, Frederick. Thanks for the kind words. I'll remember that in the future. Have a nice day.

Lyza Sandgren

John's point is excellent. Years ago I attended a conference where someone pointed out that many clients pay bills only once or if you are lucky twice a month. Usually the first of the month and possibly also the 15th.

If you issue your bill on the 1st of the month, then many clients will not receive or process it for a few days/a week. Then you have missed their payment window for the month and have to wait until the next one (either the 15th or the next 1st). If you mail your bills on the 15th or 20th you

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have a better chance of being fresh in their minds when they pay on the 1st.

My secretary does her pre bills on or about the 15th and my associate and I review in the next day or two as our schedule permits and then they are finalized, posted and emailed and mailed by the 20th. Yes, we send the bills both ways, the latter on blue paper and sent with a blue return envelope to maximize potential for payment.

Michelle J. Rozovics, Illinois

Lyza,

Sounds like a lot of work "proof reading" before you actually get to bill.

Why do you find you need to "make sure the work matches the calendar and emails/receipts?" Does it often not match?

Just off the cuff, I'd want to look at what it is that is keeping you from just printing and mailing on the 1st. If you really find that you cannot trust the entries, and have to go back and doublecheck everything, then there is a problem with the input side of things. You should have a lot more confidence that the entries were put in right the first time and just have to make minor changes when time to bill.

Hard to say more based on your initial statement. But happy to help!

Nancy Duhon

I don't mind billing. Billing is simple for me, and I can send (email) all my bills in a few minutes. For me, billing doesn't take place all in one day. I make sure all my time entries are accurate at the end of every day, so that I don't lose track of any time or have any entries that I have to question later on. Then, when billing day comes, I just click a few buttons using my invoice system, and my invoices are created and sent (emailed) out. Also, the nature of my business means that I have to keep up with my billing everyday -- e.g. for shorter freelance assignments, I send invoices out when the project is complete, which could be any day. For the longer freelance assignments and direct clients, I bill every two weeks. For one of my direct clients, I bill quarterly. Regardless of the frequency of invoicing, if I check my time entries for accuracy at the end of each day, I am ready to invoice whenever I want.

However, I think how difficult billing is can depend on the business. Lyza, in your situation, where you have to review time entries for many people, I can see why you hate billing day! Maybe you can have a few "billing

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managers" you trust to review the entries for X number of workers, so the work of time review is spread out?

Tracia Y. Lee, Texas

Well, as I said off list to Lyza and am now sharing with the rest of the world, I bill each client now twice a month, doing five letters of the alphabet daily. On the off week, I send Reminder Notices. At first it sounds like more work, but the reality is that it makes me look at each matter (currently, I have 140 open cases) and if nothing has occurred, nothing is billed. I tell all my clients when they hire me that billing takes place twice monthly. It is a way of communicating with the client as to what is happening and a way for me to monitor both my work and my assistants' work.

But the best part of it is that virtually every day of the month, I can go into my billing registry to see what I invoiced each day, to give me an idea of what my billing/cash flow "should" be. Most days, I am able to go through the five letters of work AND billing before lunch, using the afternoon to tackle the longer tasks which couldn't be completed in the morning. My schedule is thrown off a bit when I have mediations, court hearings, depositions, etc., but I know that I will usually be able to pick up the missed letters of the alphabet next week.

I include blue SASE envelopes with most of my mailed invoices. The Invoices that are emailed are accompanied with a reminder that we accept credit card payments via phone. And if anyone gets too far behind on payments, I'm getting out of cases earlier in the process.

Plus, cash "should" be flowing in almost daily, as someone ends up being invoiced almost daily. As our bud Martha might say, "It's a good thing."

I'm much happier with this system than trying to bill all on one day. I hate, hate, hate billing, but I love, love, love seeing funds come in the door, so I don't have so much of a delay in receiving payments!

Vicki Levy Eskin, Florida
