

FIRM CENTRAL

TIME & BILLING USER GUIDE

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Time & Billing User Guide

Within Thomson Reuters Firm Central, the Time & Billing section allows users to track time to matters, create and review pre-billing, and finalize and send invoices. In addition, payments received can be entered and tracked, and accounts can be added and managed—all in one place.

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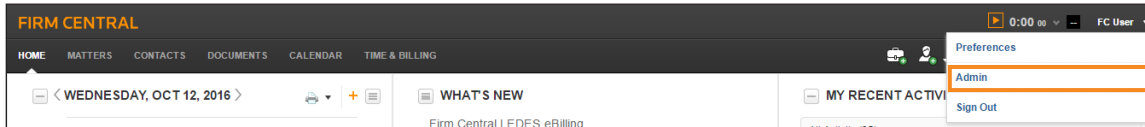
Administration and User Preferences Setup

Time & Billing can be customized to fit your firm’s needs - setting items such as activity and matter codes as well as intervals for tracking billable time. In addition, preferences can be set to match how your firm does business, which will apply across all newly created matters and clients. Individual users can also edit personal preferences for interval tracking.

ADMIN TIME & BILLING PREFERENCES

To access Admin capabilities, click the drop-down menu in the upper right corner under your username and click **Admin**.

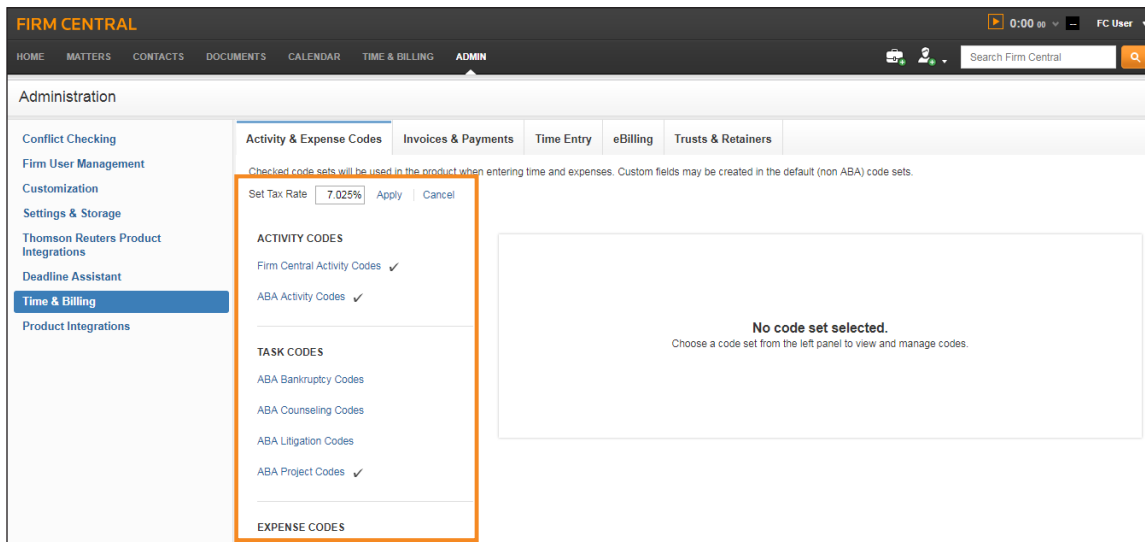
Note: Only users who have Admin permissions will be able to access this section.



When you switch to Admin capabilities, the Admin tab within Firm Central automatically appears. Click **Time & Billing** on the left to change and establish relevant defaults for your firm. There are four preference tabs within Time & Billing: **Activity & Expenses Codes**, **Payments & Invoices**, **Time Entry**, **eBilling**, and **Trusts & Retainers**.

Activity & Expense Codes

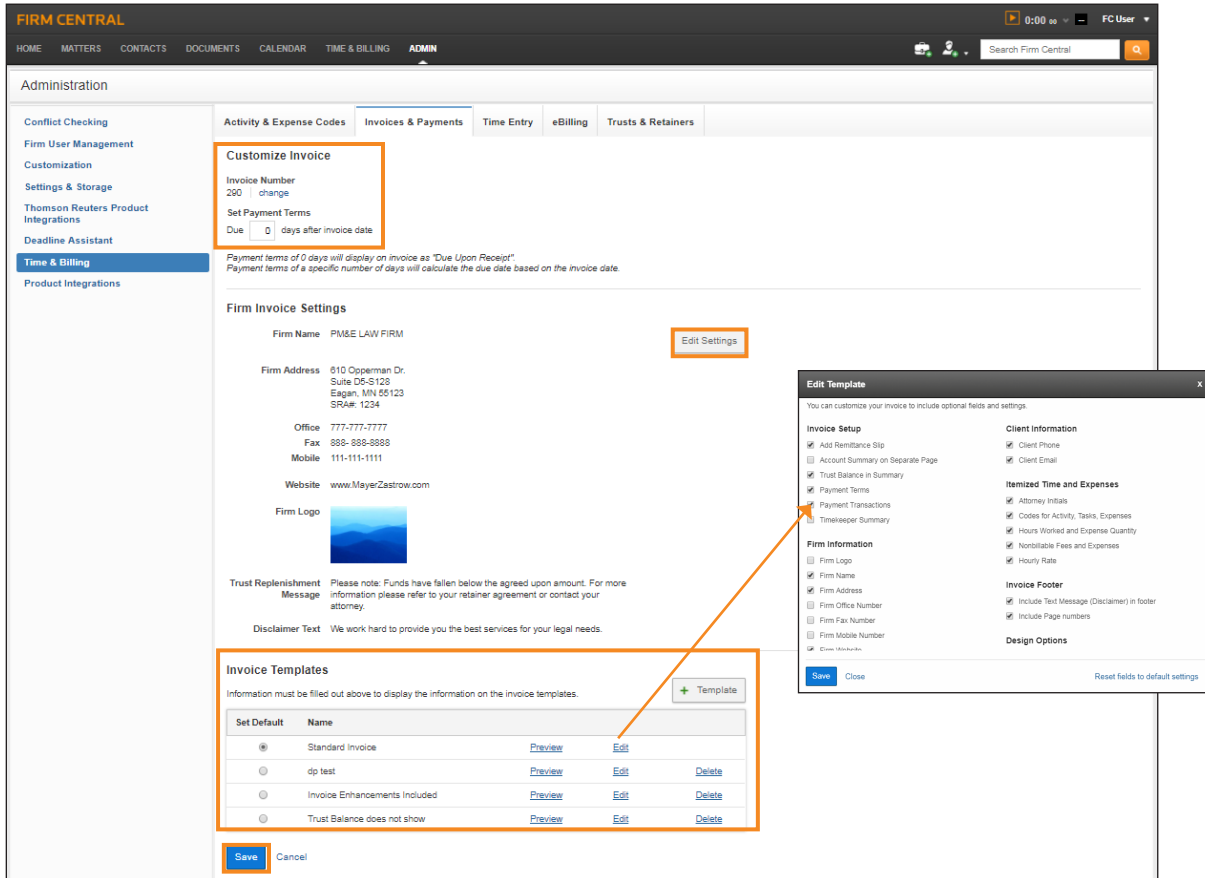
- Enter a value into the **Set Tax Rate** field and click **Apply** to change the tax rate for your firm.
- Click on an **Activity Code**, **Task Code**, or **Expense Code** to view it in the window on the right. You can select which codes to include in the set, as well as make the set available when entering your time or expenses. Firm Central offers its own set of codes, as well as ABA codes that are compliant with LEDES form 1998B. You can also create your own customized activity codes as well as add, remove, rename, and set default cost and expense codes.



Invoices & Payments

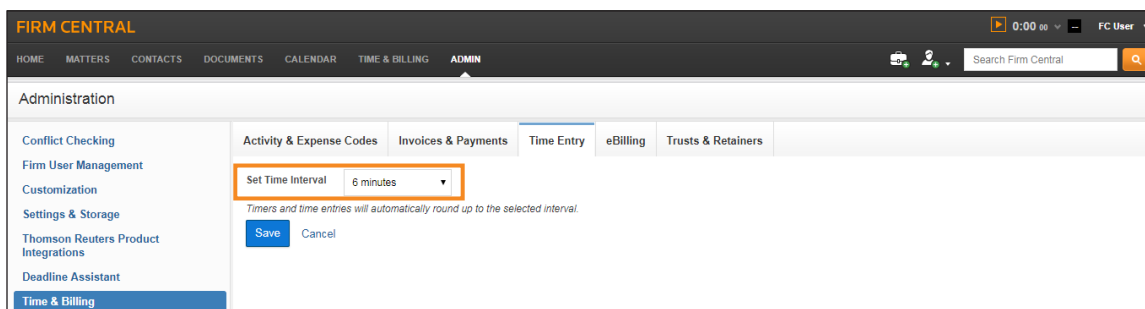
- Click **Change** to enter your starting invoice number.
- Toggle the due date for invoices by changing the payment terms. Enter a number in the **Set Payment Terms** field. If you want invoices to be “due upon receipt,” enter 0 in the **Due** field; invoices will be labeled OVERDUE immediately after the client receives their receipt. Click **Save** at the bottom of the tab to apply the change.

- To change invoice settings, click **Edit Settings** under the Invoice Settings section. You can change the *Firm Address, Contact Numbers, Website, Firm Logo, and Disclaimer Text*. Click **Save** at the bottom of the tab to apply the changes.
 - To change the firm name, under the Admin tab, click **Settings & Storage** on the left and make changes under *Set Firm Display Name*.
 - For matters that have a trust, you can customize the *Trust Replenishment Message*. This message will appear on invoices when the client’s trust has fallen below the specified amount.
- Preview, edit, and create new invoice templates in the Invoice Templates section. Use the radio buttons to select the default invoice template for your firm.



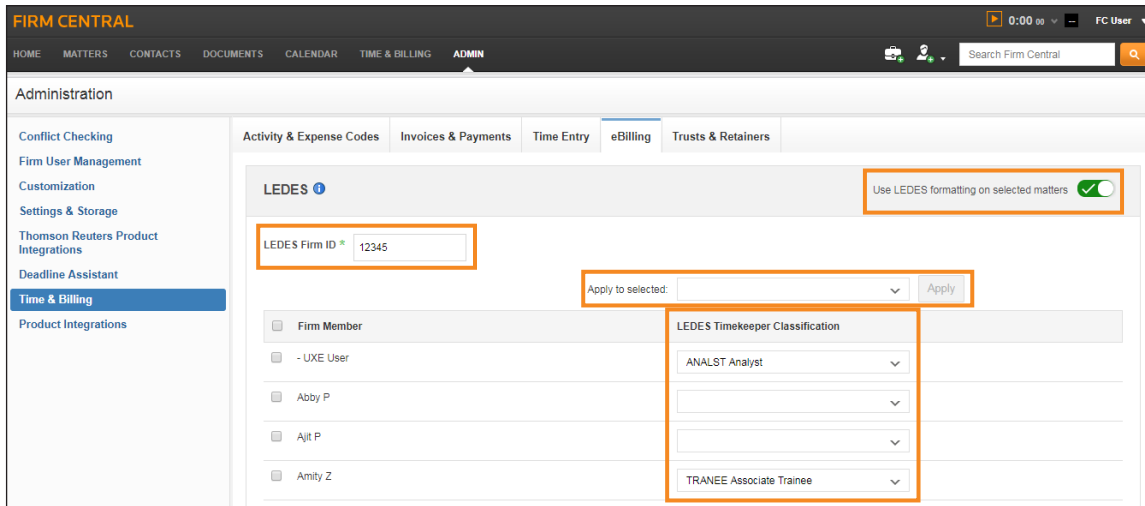
Time Entry

- Use the drop-down menu to set the preferred interval for tracking time at your firm. Any time that is entered will automatically round up to the selected interval. Click **Save** to confirm your selection.
- Users without Admin permissions will need to set their Time & Expense options by clicking **Preferences** under their username and clicking **Time & Expenses** on the left.



eBilling

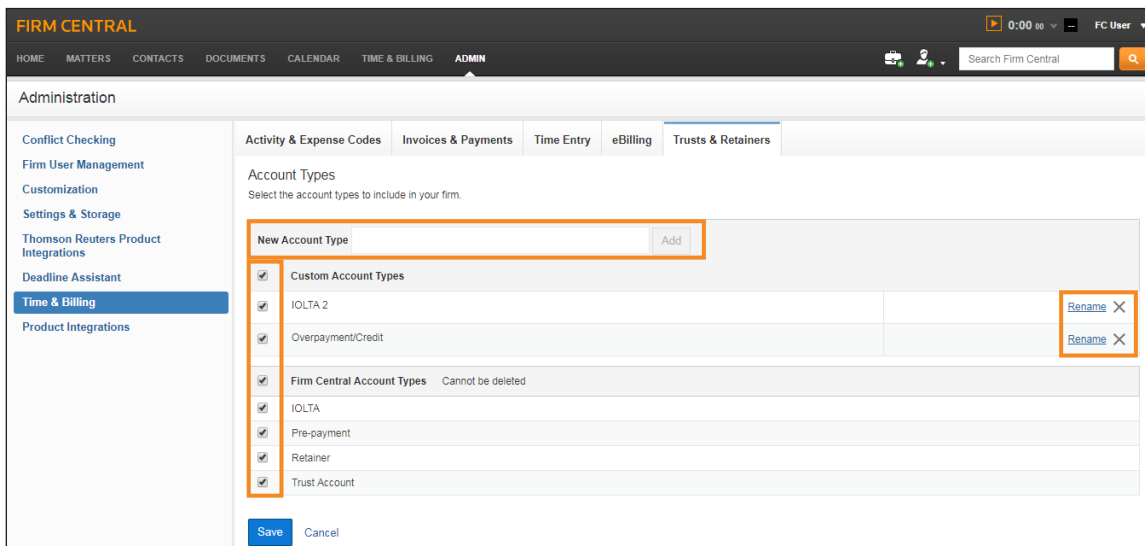
- If some matters require your firm to use LEDES format, toggle the *Use LEDES formatting on selected matters* switch to the green check mark. Enter your given firm ID in the *LEDES Firm ID* field.
- Assign Firm Members a LEDES timekeeper classification by using the drop-down menus next to their names. Click **Save** at the bottom of the tab to apply the classifications. To change multiple users at once, select the check box next to each name, select their classification from the *Apply to selected:* drop-down menu, and click **Apply**.



Trusts & Retainers

Use this tab to add new account types and select which account types are available for your organization to add to matters.

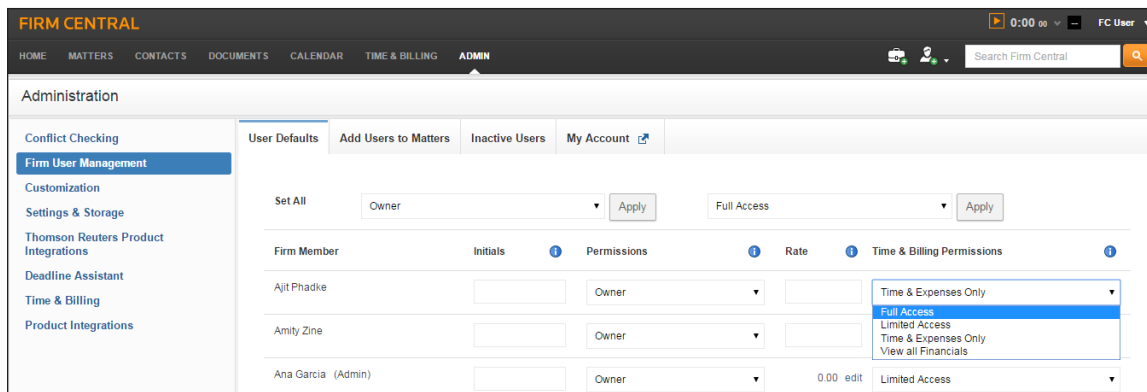
- To add a new account type, enter its name in the *New Account Type* field and click **Add**. All Custom Account Types appear in the list below this field.
 - Click **Rename** to change the name of the account. Click the **Delete** icon to remove it.
- The default Firm Central account types appear in a list at the bottom of the page.
- Select the check boxes preceding account types to make that account available for users in your organization to add to matters. Click **Save** when you are finished.



TIME & BILLING PERMISSIONS FOR FIRM USERS

You can set default Time & Billing permissions for each firm user as an Admin. Click on **Firm User Management** on the left. Here, each firm member's Initials, Permissions, Default Billing Rate, and Time & Billing Permissions can be set. For Time & Billing Permissions, there are four levels:

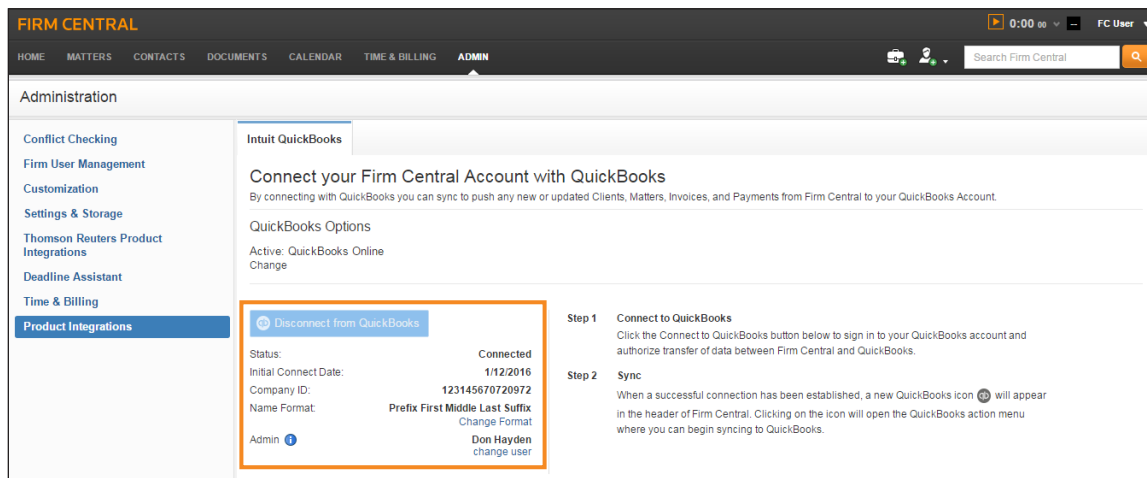
- **Full Access**, which allows the user to perform all actions related to Time & Billing.
- **Limited Access**, which allows the user to add time and expenses on behalf of another user and view and create pre-bills. The user can also update their own user rates as well as the rates of other users.
- **Time & Expenses Only**, which allows the user to enter time and expenses only. They do not have access to pre-bills, invoices, trust accounts, or any other action related to Time & Billing.
- **View All Financials**, which allows the user to access all of the Time & Billing tabs as well as pre-bills, invoices, and trust accounts and statements. However, the user will not be allowed to generate invoices or perform any transactions.



PRODUCT INTEGRATION

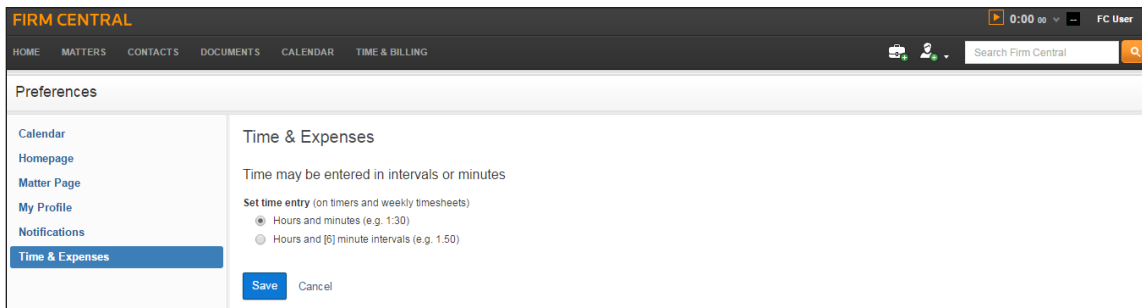
As an Admin, you can sync your QuickBooks account to Firm Central in order to push any new or updated Clients, Matters, Invoices, and Payments from Firm Central to your QuickBooks account. On the right, click **Product Integrations** to connect your QuickBooks account. If there is an account that is already connected, you will see the connection settings.

- Click **Connect to QuickBooks** to add an account or **Disconnect from QuickBooks** to disconnect the current synced account. You can only have one QuickBooks account connected to your firm at a time.
- Click **Change Format** under the Name Format to change the name display format.
- Click **change user** under Admin to become the Admin with the ability to sync to the QuickBooks account. Only one Admin has the ability to sync.



USER PREFERENCES

As a user, you can change the time interval you use for your individual timers and on weekly time sheets. Click **Preferences** under your username, and then click **Time & Expenses** on the left. Select your preferred interval using the radio buttons, and click **Save** to confirm.



Matters Setup: Time & Billing

When creating new matters or viewing existing matters, you can set or change Time & Billing defaults that apply to the individual matter.

CREATING A NEW MATTER: TIME & BILLING SETUP

When you are creating a new matter, the Billing Information section on the New Matter form displays settings related to Time & Billing.

- From the **Billing Type** drop-down, select *Hourly*, *Flat Fee*, or *Contingency* for the billing type.
 - *Hourly* is used for hourly billing, and the rates will depend on each user. These rates can be modified in the Matter Team section of the New Matter form.
 - *Flat Fee* is used to bill the client a single flat fee. Include a **Fee Description**. Select the **Mark Ready to Bill** check box if you are ready to create an invoice immediately after creating the matter. You can also choose to **Include time entries on invoice** and **Charge expenses in addition to flat fee** as you create the matter.
 - *Contingency* is used for matters that have a contingent arrangement with the client. When creating the matter, you only need to indicate *Contingency* as the billing type and if you want to **Include time entries on invoice** and **Charge expenses in addition to firm fee**. Additional steps will follow once you receive a settlement.
- Select an **Invoice Template** from the drop-down menu. The default template will automatically be populated.
- If this matter needs a trust or retainer account, click the **Add Trust & Retainer Account** button. Select the **Account Type**, and include the **Account Name**, **Date Opened**, and the **Initial Balance**. The initial balance can be edited up until the first transaction is posted.
 - Optionally, enter a **Minimum Balance Amount** for this account. Select the **Include Account Replenishment Message on Invoice** check box to include that message for this matter's invoices. When the minimum balance is reached, the message will appear on subsequent invoices.
 - Optionally, select to **Include account balance on invoice**.
 - Select the **Auto deduct payments** check box to automatically use the balance of an account as payment when you run invoices for this matter. Only one account can be used to auto deduct payments, and you must select it from the drop-down. If you do not select this option, you will need to manually add payments to invoices, and select an account as the payment type.

Note: You can add up to five accounts for each matter. Each account must be of a different type, however (you cannot add two trust accounts to one matter, for example).

- If this matter requires you to use LEDES, select the *Use LEDES formatting* check box under eBilling. Relevant ABA codes will appear for selection in time and expense entries, pre-bills, and invoices for this matter.

FIRM CENTRAL 0:00 00 FC User

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ADMIN

Search Firm Central

Billing Information

Billing Contact

Use if billing contact is different from Matter client.

Billing Type Hourly

Lead Attorney
 --Select--

Invoice Template
 Standard Invoice

Trust & Retainer Accounts
May add accounts after the matter is created.

Account Type * Trust Account

Account Name * Anderson Trust

Date Opened * 10/19/2017

Initial Balance, \$ * 0.00 Balance Description Opening Balance

Minimum Balance Amount, \$ Include account replenishment message on invoice

Include account balance on invoice

[Delete Account](#)

[Add Trust & Retainer Account](#)

Auto-deduct payments Anderson Trust

eBilling
 Use LEDES formatting

Court Information

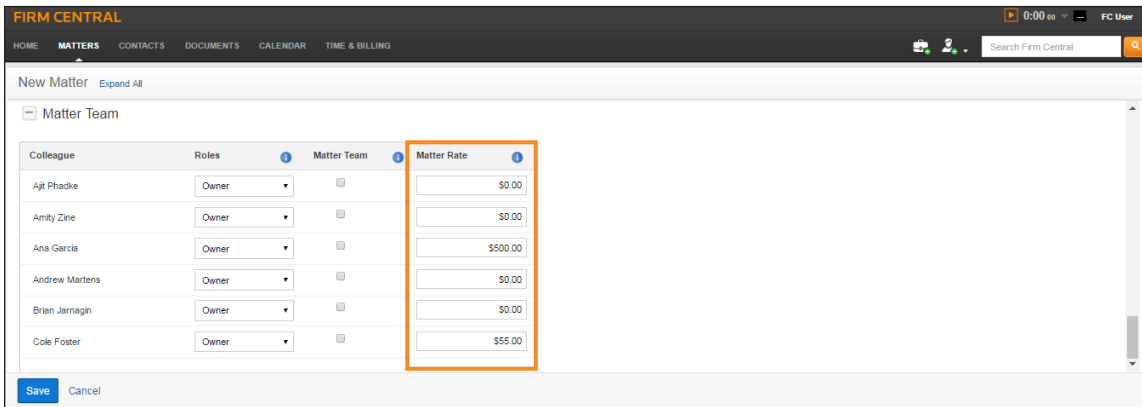
Custom Fields

Matter Team

Save Cancel

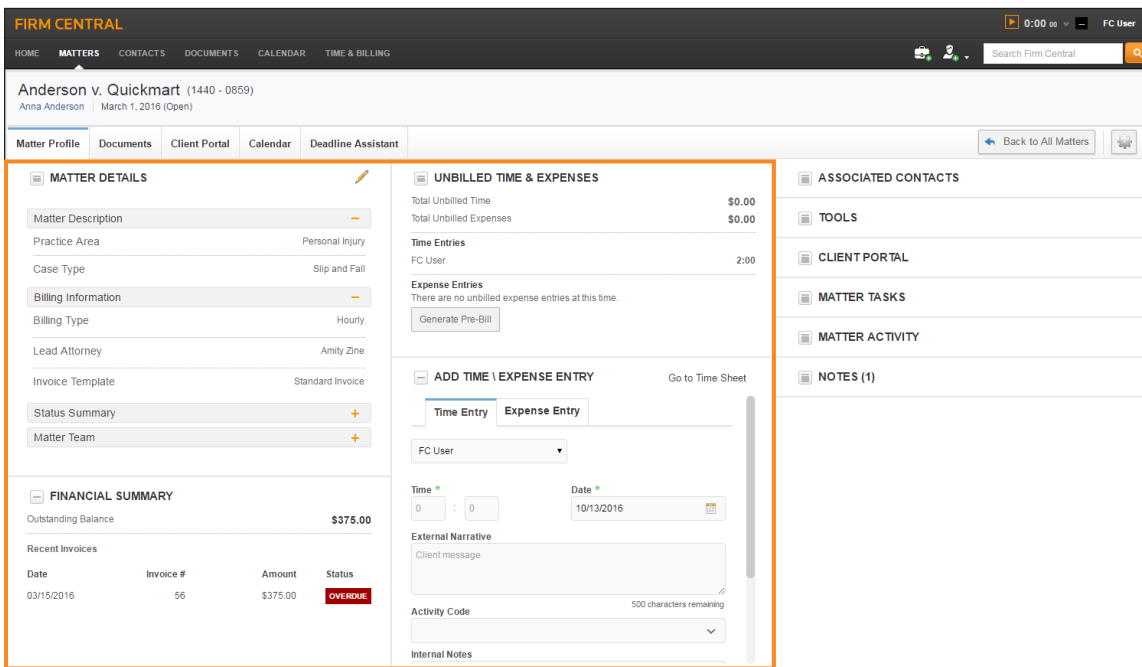
In the Matter Team section, adjust the rates of users for this specific matter by altering the *Matter Rate* field as necessary. The default rate for the user will apply unless it is changed here.

Once you have completed the New Matter form, click **Save** to create the matter.



VIEWING AND EDITING A MATTER: THE MATTER PROFILE PAGE

Once your matter is created, the Matter Profile page displays. This page is comprised of many widgets which contain relevant information for your matter, such as notes, tasks, and matter activity. There are several widgets that help you with expenses using Time & Billing.



Matter Details Widget

In this widget, you can view and edit the billing information, including billing type and all accounts associated with this matter. To edit this and other information related to the matter, click the **Pencil** icon. The Edit Matter form will appear. This is identical to the New Matter form, and you can edit information involving the billing type, invoice template, account settings such as establishing a minimum balance and adding an account replenishment message, and LEDES formatting.

Financial Summary Widget

This widget displays any outstanding balances on this matter as well as the last three invoices and their status. Click the **Invoice Number** to preview the invoice. If the matter uses trust or retainer accounts, the current balances will be also displayed along with their minimum balances. This widget will appear only if you have the appropriate permissions for the matter.

Unbilled Time & Expenses Widget

This widget displays the total unbilled time or expenses for the matter that has not been pulled into a pre-bill, as well as recent unbilled time or expense entries. Click the **Generate Pre-Bill** button to begin generating a pre-bill for this matter. This widget will appear only if you have the appropriate permissions for the matter.

Add Time/Expense Entry Widget

Instead of going into the Time & Billing tab on Firm Central, you can add time and expense entries on the Matter Profile page using this widget.

To add a time entry, choose the user from the drop-down menu (you can enter time for others, if you have proper permissions), and add the *Time, Date, External Narrative, Activity Code, Note*, and *Rate* as needed, and click **Submit Time**.

To add an expense entry, choose a user from the drop-down menu (you can enter expenses for others, if you have proper permissions), and add the *Date, External Narrative, Expense Code, Cost*, and *Note* as needed, and click **Submit Expense**.

To edit any time or expense entries, navigate to the Time Entry or Expense Entry tab in Time & Billing.

Using Time & Billing

When using Time & Billing, there are a number of functions you can perform, from entering time to finalizing invoices and tracking payments. To begin, click the **Time & Billing** tab on the banner menu.

THE TIME ENTRY TAB

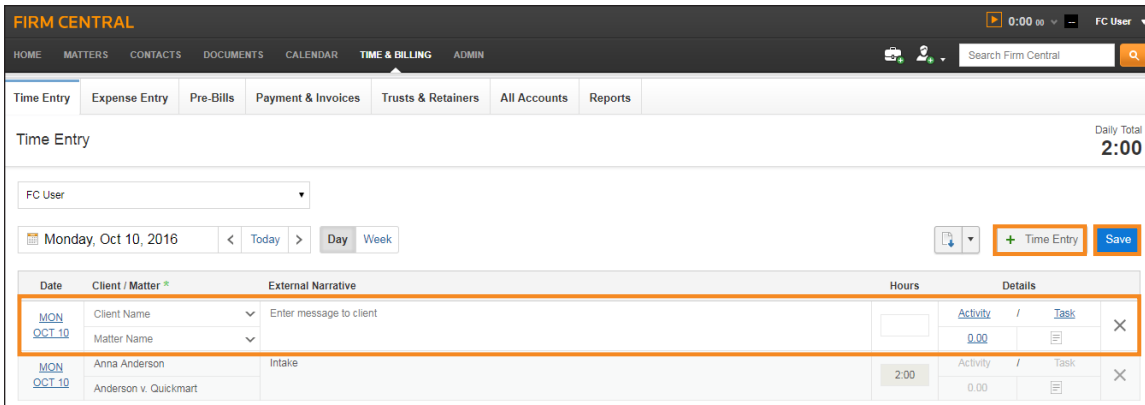
View, add, or edit time entries for any client or matter in the Time Entry tab. Entries can be viewed by **Day** or by **Week**. The table is sorted by the most recently created or edited time entries. Access weeks or days other than the current one by using the **arrows** next to the date, or click the **Calendar** icon to display a calendar to navigate. Click the **Today** button to navigate back to the current day or week. In the weekly view, click a date in the column to view the daily time entries for that day. The *Weekly Total* or *Daily Total* for the selected week or day appears in the upper right corner.

Click the **Delivery** button to export a range of time entries to a .csv file. In the Export form, enter a *File Name* and specify the *Transaction* dates (limited to 365 days), and click **Export**.

Add a Time Entry

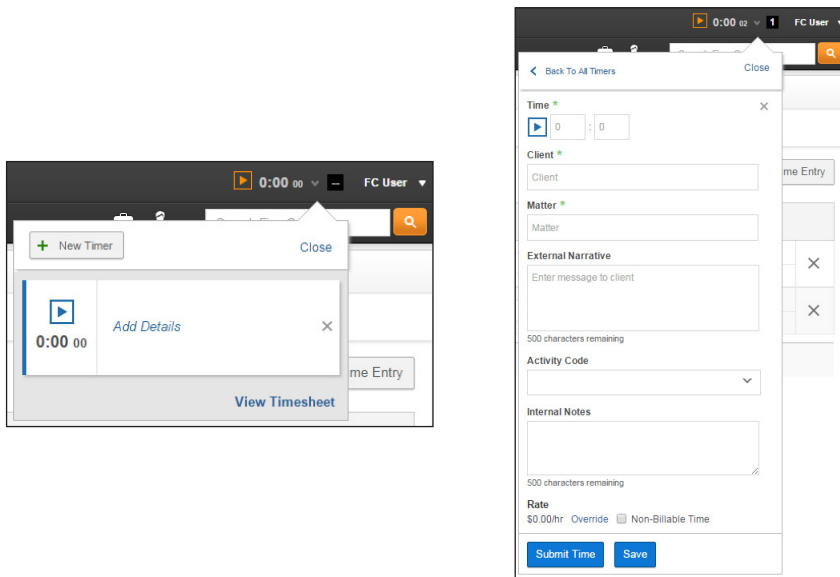
To add a time entry in the Time Entry tab, complete the following:

1. Ensure the user you are entering time for is selected in the drop-down menu at the top left. Click the **+ New Entry** button to add a new time entry for the displayed week or day. When you do so, a blank row will appear at the top of the Time Entry table.
2. Enter the *Client* and *Matter* for which you are entering time, and enter the appropriate intervals in the appropriate days. Click the **Rate** in the Details section to change the user's rate for this entry if necessary. This will not change the user's default rate.
3. Either fill in the *External Narrative* field, or provide an *Activity* or *Task* code for the entry. If the matter requires LEDES format, there will be LEDES activity codes in the drop-down.
4. Click **Save** when you are finished.



You can also add a time entry in real time using the timer function in Firm Central. To begin a new time entry, complete the following:

1. Click the timer at the top right of the window next to your username, and click **+ New Timer** in the drop-down.
2. Click the blue **Play** button to begin timing, and the **Pause** button to stop. The timer will save automatically. When you are available, click the **Add Details** button to make the time entry.
3. The information fields that appear are identical to the Time Entry table details on the Time Entry tab. Complete the form, and click **Submit Time**. The entry will appear in the Time Entry tab.



Alternatively, you can add a time entry using the Time/Expense Entry widget on a matter profile page. The information fields that appear are identical to the Time Entry table details on the Time Entry tab. Complete the form, and click **Submit Time**. The entry will appear in the Time Entry tab.

Editing a Time Entry

To edit a time entry, locate the desired row you need to edit in the Time Entry tab, and click the field for the date you need to change. You can change the time using either increment-based or chronological format. You can also change the *External Narrative*, *Activity Code*, or rate as necessary. Click **Save** when you are finished. That entry will move to the top of the table in both the Weekly and Daily view. You can only edit time entries that have not been pulled into a pre-bill or invoice.

THE EXPENSE ENTRY TAB

View, add, or edit expense entries for any client or matter in the Expense Entry tab. Entries are organized by week. Access weeks other than the current week by using the **arrows** next to the date, or click the **Calendar** icon to display a calendar to navigate.

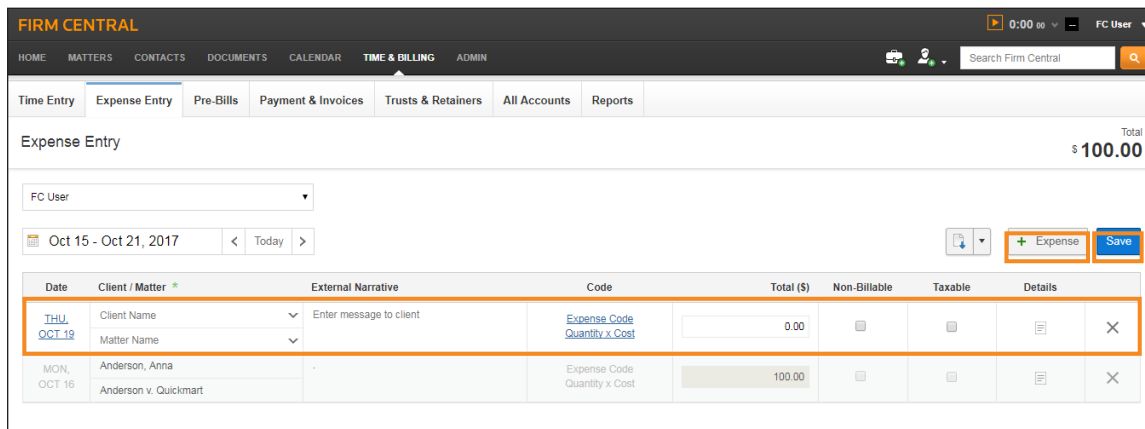
Click the **Delivery** button to export a range of expense entries to a .csv file. In the Export form, enter a **File Name** and specify the **Transaction** dates (limited to 365 days), and click **Export**.

Add an Expense Entry

To add an expense entry in the Expense Entry tab, complete the following:

1. Ensure the user you are entering the expense for is selected in the drop-down menu in the top left. Click the **+ Expense** button to add a new expense entry for the displayed week. When you do so, a blank row will appear at the top of the Expense Entry table.
2. Enter the **Client** and **Matter** for which you are entering the expense.
3. Fill in the **External Narrative** field or provide an **Expense Code** for the entry. If the matter requires LEDES format, there will be LEDES expense codes in the drop-down.
 - If you fill in the **External Narrative** field, enter the expense in the **Total (\$)** field. If you use an **Expense Code**, the **Total (\$)** field will be populated automatically.
4. Select the **Taxable** check box, if necessary, and click **Save** when you are finished.

Alternatively, you can add an expense entry using the Time/Expense Entry widget on a matter profile page.



Editing an Expense Entry

To edit a expense entry, locate the desired row you need to edit, and click the field for the rate you need to change. You can also change the **External Narrative** or **Expense Code** as necessary. Click **Save** when you are finished. That entry will move to the top of the table. You can only edit expense entries that have not been pulled into a pre-bill or invoice.

THE PRE-BILLS TAB

Once you are ready to begin building invoices for your clients, you must first generate pre-bills in the Pre-Bills tab. The top section of the tab shows all pre-bill groups you have created and are represented with boxes showing the title and total unbilled time. The Pre-Bills section shows all pre-bills that are ready to be generated into invoices.

Pooling your time and expense entries into pre-bill groups makes your entries more organized and easier to track, and the process of creating invoices smoother.

Generate Pre-Bills

Select Pre-Bill Group Include matters with no new activity Select Matters Manage Pre-Bill Groups

All Matters (179) UNBILLED TIME \$30,747.50 Oldest Item: 02/29/2016	A-B Clients (60) UNBILLED TIME \$6,600.00 Oldest Item: 04/22/2016	Attorney Freem... (7) UNBILLED TIME \$240.00 Oldest Item: 09/21/2016	Thompson Ente... (3) UNBILLED TIME \$16,892.50 Oldest Item: 02/29/2016
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Enter Date Range: 10/31/2016 Generate Pre-Bills

Pre-Bills

Start	End	Lead	Client	Matter	Matter #	Billing Type	Total	Status
09/30/2016			Larry's Custom Motorcycle Building Shop and V-Twin Repair Servic...	Custom Motorcycle Frame that Cracked due to Defective metal and ...	1085	Hourly	3,330.07	Pre-Bill
09/30/2016		KEFT	Cynthia Brady	Brady Howell Litigation	0165	Hourly	2,415.00	Pre-Bill
			Bobby Brady	Last Will and Testament	1083	Flat Fee	1,210.00	Pre-Bill
07/26/2016	09/30/2016	DH	ABC Company	slip fall	2016-...	Hourly	1,000.00	Pre-Bill
	09/30/2016		Elon Musk	Biohazard Defense PR	0938	Hourly	500.00	Pre-Bill
03/01/2016	03/11/2016	KEFT	Thompson Enterprises	Real Estate Development	0794	Hourly	20.00	Pre-Bill
	08/31/2016	KEFT	Cynthia Brady	Brady Howell Litigation	0165	Hourly	0.00	Pre-Bill
	05/31/2016		Tom & June Abbott	Abbott Heating Incorporation	0784	Hourly	0.00	Pre-Bill
	06/30/2016		Elon Musk	Trust Account Setup for Child 1	0952	Hourly	0.00	Pre-Bill

Showing 1 to 9 of 9 entries Show 20 entries

Create and Manage Pre-Bill Groups

In the Select Pre-Bill Group section, all of your pre-bill groups are displayed in boxes. Clicking on **Manage Pre-Bill Groups** will bring you to the Manage Pre-Bill Groups page, where you can create or edit pre-bill groups.

To create a new pre-bill group, click the **+ New Pre-Bill Group** button on the left side.

- Enter the **Group Name**, and select the radio button for the **Group Type**. These group types allow you to classify your pre-bill group by client, matter, lead attorney, or practice area. Click **Apply**.

Manage Pre-Bill Groups

+ New Pre-Bill Group

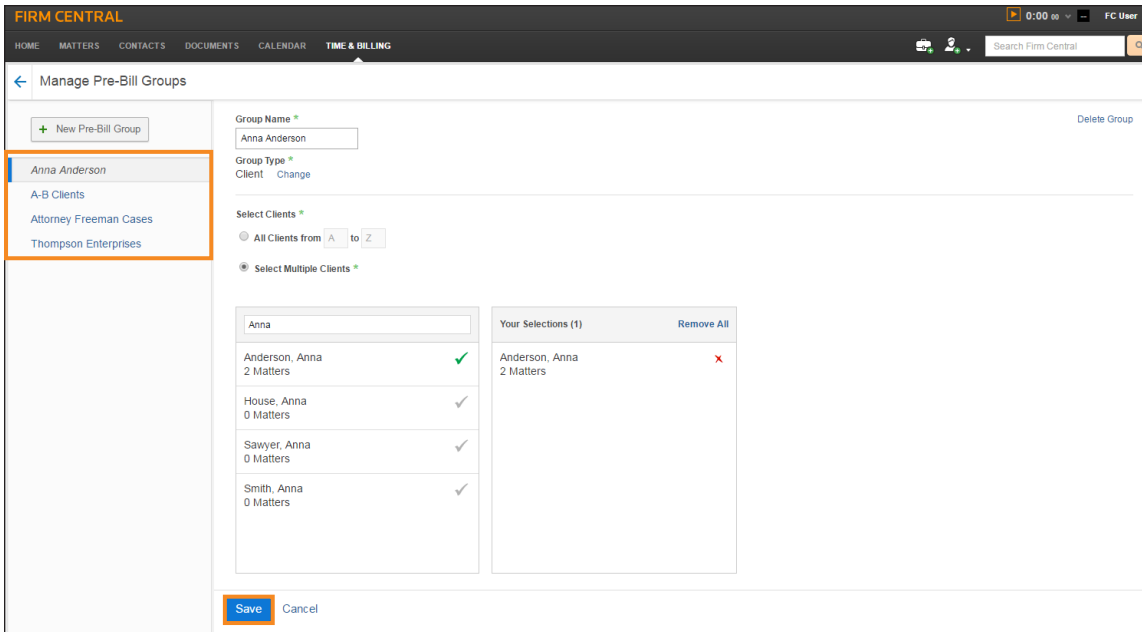
- Anna Anderson
- A-B Clients
- Attorney Freeman Cases
- Thompson Enterprises

Group Name *
Anna Anderson

Group Type *
 Client
 Matter
 Lead Attorney
 Practice Area

Apply

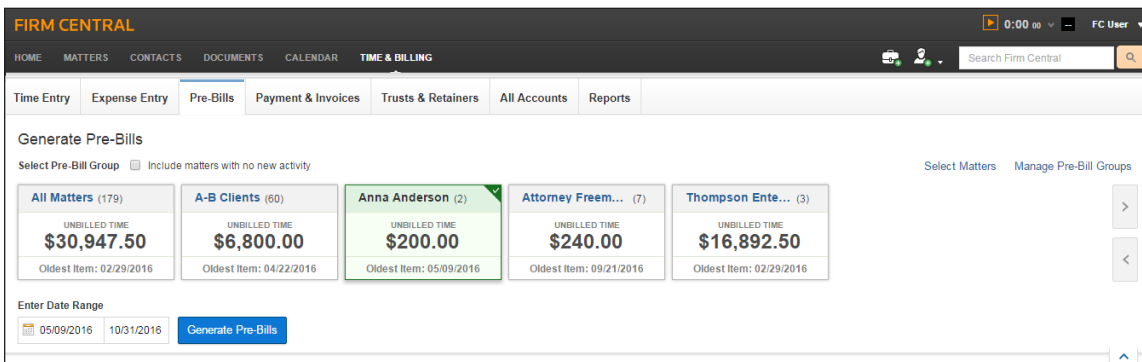
- Based on the **Group Type** you chose, relevant menus will appear to help you select the appropriate client, matter, attorney, or practice area for which you are generating the pre-bill group. Click **Save**. The pre-bill group will appear on the left side as well as on the Pre-Bills tab with its own box.



To edit a pre-bill group, click the **Group Name** on the left side. Make the appropriate changes to the *Name*, *Group Type*, or additional information, and then click **Save**. Click **Delete Group** to delete the pre-bill group.

Create a Pre-Bill

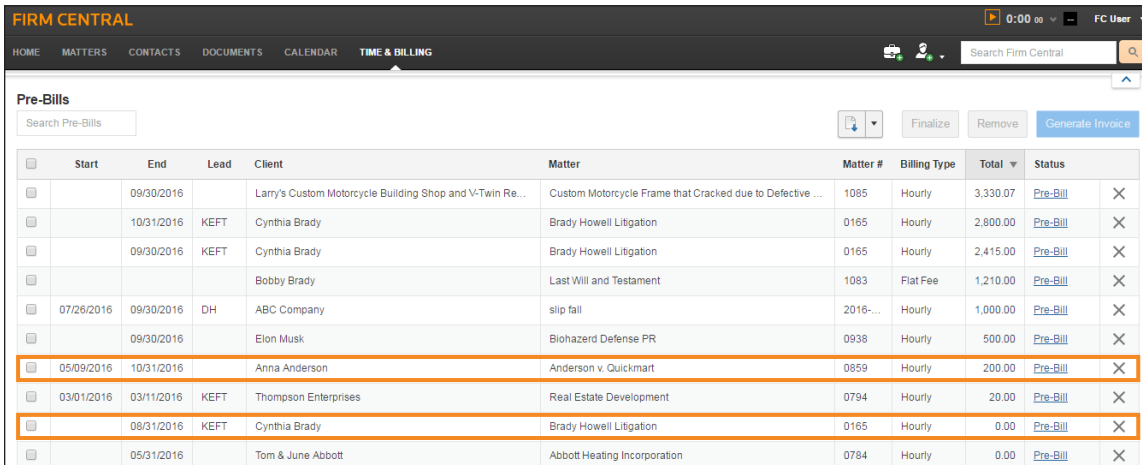
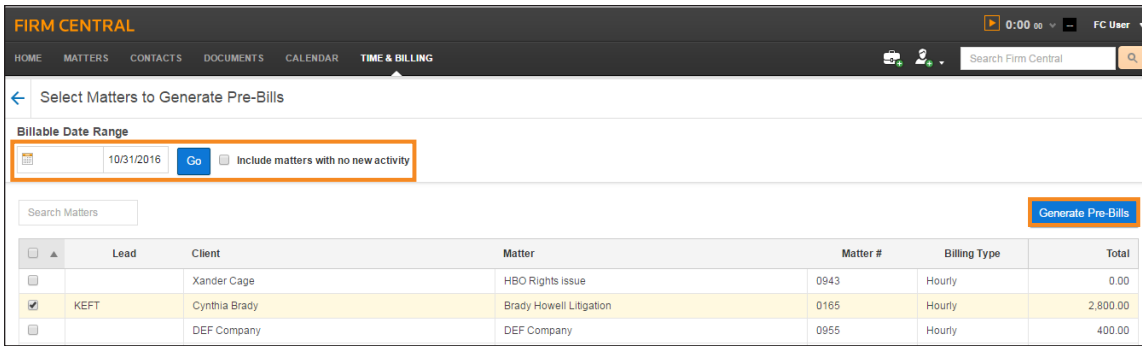
Once you have created a pre-bill group, you are ready to generate pre-bills. Click the box for the pre-bill group or groups you want to make a pre-bill for. You can also select the check box to *Include matters with no new activity* to show matters with no additional time or expense entries since the last pre-bill was run. Select a date range, and click **Generate Pre-Bills**.



The amount of the pre-bill will be deducted from pre-bill group box, and the pre-bill is queued in the Pre-Bills section of the tab.

Additionally, you can create a pre-bill by matter by clicking the **Select Matters** link. This will bring you to a list of matters with outstanding time and expenses on the Select Matters to Generate Pre-Bills page.

- Enter a date range, if you wish. You can also select the check box to *Include matters with no new activity* to show matters with no additional time or expense entries since the last pre-bill was run.
- Select the check boxes for the matters you want to generate this pre-bill for, and click **Generate Pre-Bills**. The pre-bill is queued in the Pre-Bills section of the Pre-Bills tab.

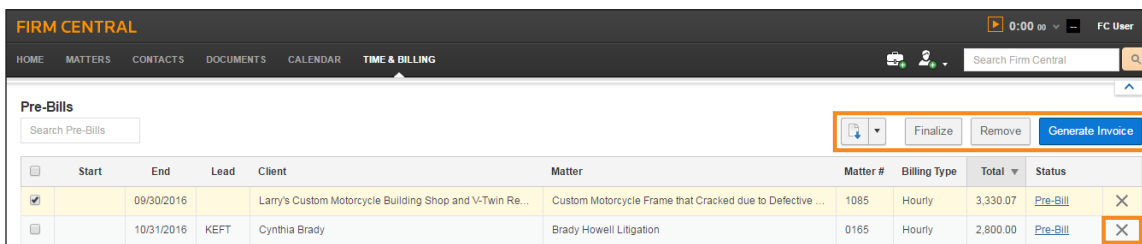


It is also possible to create a pre-bill for a matter on the Matter Profile page using the Unbilled Time & Expenses widget. Click **Generate Pre-Bill** on the widget to begin the process.

Review Pre-Bills

The Pre-Bills section of the Pre-Bills tab shows all pre-bills that have been created but have not yet been generated into invoices.

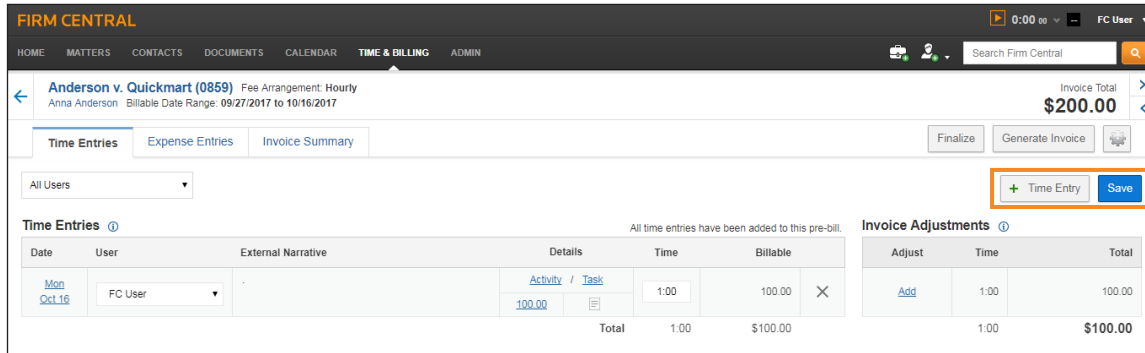
- To print or download a list of pre-bills or the pre-bills themselves, select the check boxes for the pre-bills you want to deliver and click the **Delivery** button. Fill in all applicable information, and the selections will be downloaded or printed as a PDF.
- To prepare a pre-bill for invoice generation, select the check boxes for those pre-bills and click **Finalize**. The status will change to Finalized and will remain in the Pre-Bills list until you are ready to generate an invoice.
- To delete a single pre-bill, click the **Remove** icon in the status column of the pre-bill you want to delete. Click **Delete** in the warning message to confirm your choice. To delete multiple pre-bills, select the check boxes for the pre-bills you want to delete, and click **Remove**. Click **Delete** in the warning message to confirm your choice. You should delete all pre-bills you do not intend to finalize or generate an invoice from.



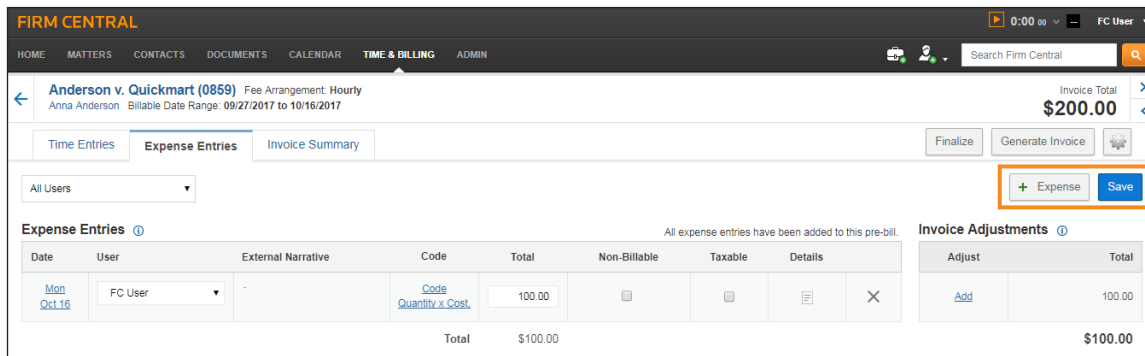
Click the **Status** link to view more information related to the pre-bill on the Pre-Bill Preview page. From this page, you can **Finalize** the pre-bill, **Generate Invoice**, **Remove**, or **Write Off** this pre-bill. If you remove or write off the pre-bill, all time and expense entries will remain editable and available on Firm Central until an invoice is made containing those entries.

There are three tabs on the Pre-Bill Preview page where you can edit aspects of the pre-bill.

- Review, add, and edit time entries as well as make invoice adjustments on the **Time Entries** tab. Be sure to click **Save** if you make any changes.
 - The Invoice Adjustments section allows you to add *Discounts* and *Write Offs* for each time entry while keeping them accurate. Click **+ Time Entry** to add an adjustment or Time Entry.



- Review, add, and edit expense entries as well as add adjustments and discounts on the **Expense Entries** tab. Be sure to click **Save** if you make any changes.
 - The Invoice Adjustments section allows you to add *Discounts* and *Write Offs* for each expense entry while keeping them accurate. Click **+ Expense** to add an adjustment or Expense Entry



- An invoice summary appears on the **Invoice Summary** tab. The previous balance, payments received, and the total outstanding balance is available to view at the top and bottom of the page. Any account balances will also be displayed if an Admin selected to display them for your organization.
 - Click the **View Pre-Bill** link to see a printable preview of the pre-bill.
 - Click the **Gear** button and then select **Write Off** to scrap the pre-bill as a write off for the client.
 - To add a discount to the total pre-bill, click the **Add** button in the Discount row. To add a finance charge to the total pre-bill, click the **Add** button in the Finance Charge row.
 - In the *Invoice Message* field, you can add a message for the client that will appear only on this invoice.

Invoice Summary

Invoice Total: **\$200.00**

Buttons: Finalize, Generate Invoice, Save

Invoice Message

Enter a message to the client

1000 characters remaining

Previous Balance	575.00
Payments Received	0.00
Outstanding Balance	575.00

Description	Adjustments	Charges and Fees
Hourly Fees		0.00
Expenses		200.00
Discount <i>Discount is applied to Fees</i>		
Expense Tax @ 7.125%		0.00
Finance Charges		--
Invoice Total		200.00
Outstanding Balance		575.00
Invoice Total		200.00
Total Due		\$775.00

Generate an Invoice

Once you have reviewed the pre-bill and it is ready for your client, make the pre-bills into invoices.

- In the Pre-Bills section of the Pre-Bills tab, select the check box for the pre-bills or finalized pre-bills you want to make an invoice for, and click **Generate Invoice**. You can also click this button on a Pre-Bill Preview page to generate an invoice for that pre-bill.
- These invoices will move to the Payment & Invoices tab, where you can track their status and payments. A copy of the invoice will save in the Time & Billing invoice folder under Matter Documents.

Note: Any outstanding balances from previous invoices will automatically appear on any new invoices you create. The invoice total will not account for the outstanding balance, however.

Generate Pre-Bills

Select Pre-Bill Group: Include matters with no new activity

Select Matters Manage Pre-Bill Groups

All Matters (179) UNBILLED TIME \$27,947.50 Oldest Item: 02/29/2016	A-B Clients (60) UNBILLED TIME \$3,800.00 Oldest Item: 04/22/2016	Anna Anderson (2) UNBILLED TIME \$0.00 Oldest Item:	Attorney Freem... (7) UNBILLED TIME \$240.00 Oldest Item: 09/21/2016	Thompson Ente... (3) UNBILLED TIME \$16,892.50 Oldest Item: 02/29/2016
--	--	--	---	---

Enter Date Range: 10/31/2016 **Generate Pre-Bills**

Pre-Bills

Buttons: Finalize, Remove, Generate Invoice

	Start	End	Lead	Client	Matter	Matter #	Billing Type	Total	Status
<input type="checkbox"/>		09/30/2016		Larry's Custom Motorcycle Building Shop and V-Twin Repair Servic...	Custom Motorcycle Frame that Cracked due to Defective metal and ...	1085	Hourly	3,330.07	Pre-Bill
<input type="checkbox"/>		10/31/2016	KEFT	Cynthia Brady	Brady Howell Litigation	0165	Hourly	2,800.00	Pre-Bill
<input type="checkbox"/>		09/30/2016	KEFT	Cynthia Brady	Brady Howell Litigation	0165	Hourly	2,415.00	Pre-Bill
<input type="checkbox"/>				Bobby Brady	Last Will and Testament	1083	Fiat Fee	1,210.00	Pre-Bill
<input type="checkbox"/>	07/26/2016	09/30/2016	DH	ABC Company	slip fall	2016-...	Hourly	1,000.00	Pre-Bill
<input type="checkbox"/>		09/30/2016		Elon Musk	Biohazard Defense PR	0938	Hourly	500.00	Finalized
<input checked="" type="checkbox"/>	05/09/2016	10/31/2016		Anna Anderson	Anderson v. Quickmart	0859	Hourly	200.00	Pre-Bill
<input type="checkbox"/>	03/01/2016	03/11/2016	KEFT	Thompson Enterprises	Real Estate Development	0794	Hourly	20.00	Pre-Bill
<input type="checkbox"/>		08/31/2016	KEFT	Cynthia Brady	Brady Howell Litigation	0165	Hourly	0.00	Pre-Bill
<input type="checkbox"/>		05/31/2016		Tom & June Abbott	Abbott Heating Incorporation	0784	Hourly	0.00	Pre-Bill
<input type="checkbox"/>		06/30/2016		Elon Musk	Trust Account Setup for Child 1	0952	Hourly	0.00	Pre-Bill

Showing 1 to 11 of 11 entries | 1 | Show 20 entries

Generate an Invoice For a Flat Fee Matter

For matters that have flat fees as the *Billing Type*, the process for creating an invoice is a little different. You cannot pool these matters into a pre-bill group. Instead, complete the following:

- On the Matter Profile page, click the **Pencil** icon on the Matter Details widget. This will take you to the Edit Matter form.
- In the Billing Information section, select the *Mark Ready to Bill* check box if you have not already done so. Click **Save**.
- Navigate back to the Matter Profile page. In the Unbilled Time & Expenses widget, the **Generate Pre-Bill** button is now active. Click on it, and you will be taken to the Pre-Bill Preview page. From here, you can add and edit time and expense entries and adjustments, **Finalize**, and **Generate Invoice** as you would on any other Pre-Bill Preview page.

The screenshot shows the 'Billing Information' form in Firm Central. The 'Billing Type' dropdown is set to 'Flat Fee'. The 'Fee Description' field contains 'Flat fee.' and the 'Amount \$' field contains '500.00'. The 'Mark Ready to Bill' checkbox is checked, while 'Include time entries on invoice' and 'Charge expenses in addition to flat fee' are unchecked. Below this, there are sections for 'Lead Attorney' (a dropdown menu), 'Invoice Template' (set to 'Standard Invoice'), 'Trust & Retainer Accounts' (with an 'Add Trust & Retainer Account' button), 'Auto-deduct payments' (a dropdown menu), and 'eBilling' (with a 'Use LEDES formatting' checkbox).

Generate an Invoice For a Contingency Matter

For matters that have contingencies as the *Billing Type*, you must complete a few steps after the settlement comes in before you can create an invoice.

- On the Matter Profile page, click the **Pencil** icon on the Matter Details widget. This will take you to the Edit Matter form.
- In the Billing Information section, enter the *Firm Percentage, %* and the *Settlement Amount, \$* into the appropriate fields. Select the *Mark Ready to Bill* check box.
- Since your firm has control of the settlement at this time, you must also create a trust account for these funds. Click the *Add Trust & Retainer Account* box, select *Trust Account* as the *Account Type*, add an *Account Name*, and the settlement amount in the *Initial Balance* field. Select the *Auto deduct payments* check box.
- Click **Save**. You can now generate the pre-bill, edit it as appropriate, and generate the invoice for this matter.

Note: Invoices made for a contingency matter cannot be voided. You must complete a *Write Off* transaction instead to void the invoice.

Billing Information

Billing Contact

Use if billing contact is different from Matter client.

Billing Type: Contingency

Firm Percentage, %: 33

Settlement Amount, \$: 15,000.00

Mark Ready to Bill

Include time entries on invoice

Charge expenses in addition to firm fee

Expenses deducted BEFORE firm fees

Expenses deducted AFTER firm fees

Lead Attorney: ---Select---

Invoice Template: Standard Invoice

Trust & Retainer Accounts

May add accounts after the matter is created.

Account Type: Trust Account

Account Name: Anderson v. Quickmart - Trust Account

Date Opened: 10/20/2017

Initial Balance, \$: 15,000.00

Balance Description: Opening Balance

Minimum Balance Amount, \$

Include account replenishment message on invoice

Include account balance on invoice

Delete Account

Add Trust & Retainer Account

Auto-deduct payments: Anderson v. Quickmart - Trust Account

eBilling

Use LEDES formatting

THE PAYMENT & INVOICES TAB

The Payment & Invoices tab allows you to make payments on and view all firm invoices.

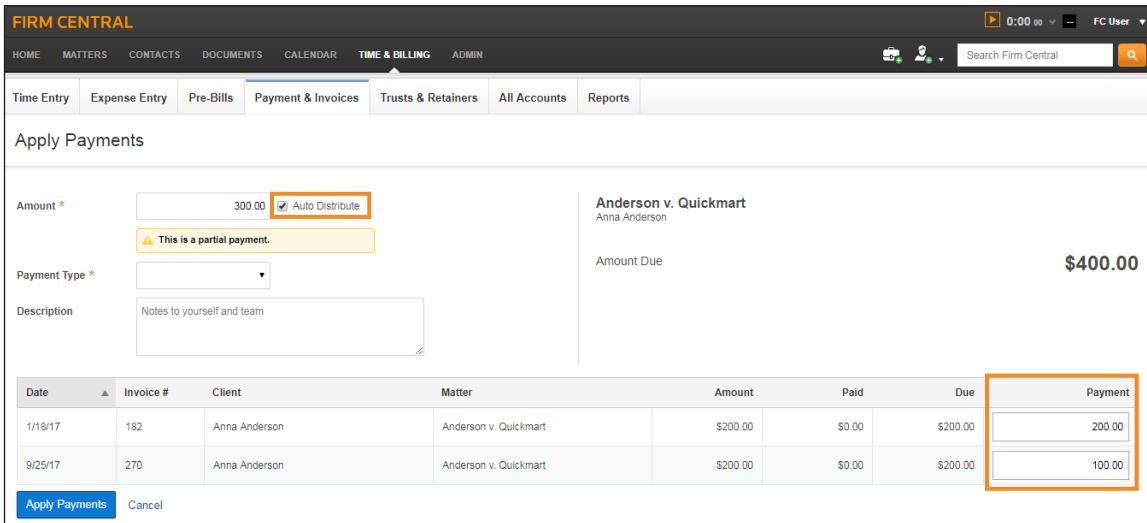
Apply a Payment to an Invoice

When you receive a payment for an invoice, enter it quickly using the Apply Payment section on the Payments & Invoices tab.

1. Enter the **Invoice Number**. Once you do this, it will appear on the right side of the page with the amount due, as well as a trust account balance if there is a trust account for the matter.
2. Fill in the **Amount** and **Payment Type**, and add an optional internal **Description**.
 - If the invoice includes a matter with an account and you did not select the **Auto deduct payments** check box for the matter, you can use one of the accounts as the **Payment Type**.
3. Click **Apply Payment**. If it is a partial payment, the status will change to *Partial*. If the balance is paid in full, it will disappear from the Invoices section, unless you have selected **Include Paid in Full Invoices**.

Additionally, you can apply payments to invoices in the Invoices section. This is helpful for clients who have multiple matters or multiple invoices.

1. Select the check boxes for the invoices you need to record payments for, and click **Apply Payment**.
2. The Apply Payments page will appear. Enter an **Amount**, **Payment Type**, and optional internal **Description**.
 - If the invoice includes a matter with a trust account and you did not select the **Auto deduct payments** check box for the matter, you can use the **Trust Account** as the **Payment Type**.
3. Underneath, the invoices you have selected appear in table format. Selecting the **Auto Distribute** check box will first apply the payment to the invoices that are due sooner and will continue applying as funds allow. Or, you can manually add amounts in the **Payment** section of the table.
4. Click **Apply Payments**. If there was a partial payment, the status of that invoice will change to *Partial*. If the balance is paid in full for an invoice, that invoice will disappear from the Invoices section, unless you have selected **Include Paid in Full Invoices**.

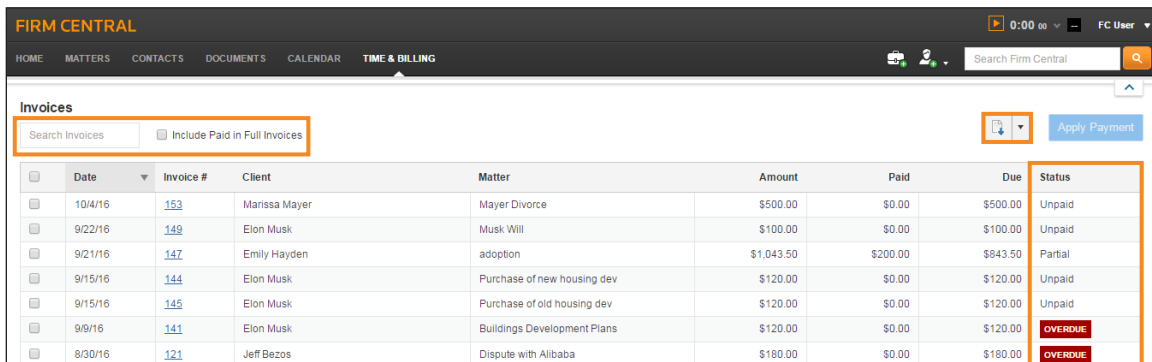


It is also possible to make a payment on the Invoice Preview page. Click the + Payment button to begin the process.

Review Invoices

The Invoices section of the Payments & Invoices tab displays all invoices with an outstanding balance.


- Use the *Search Invoices* field to easily locate invoices.
- Select the *Include Paid in Full Invoices* check box to view all invoices for the firm.
- Click the **Delivery** button to download or print a list of invoices or the invoices themselves. Select the check boxes for the invoices you want to deliver, and click the button. The file will be downloaded or printed in PDF format.
- The Status column of the Invoices table shows if the invoice is *Unpaid*, *Partial*, *Paid in Full*, or *OVERDUE*. The *OVERDUE* status of the invoice depends on the payment terms set by an Admin.

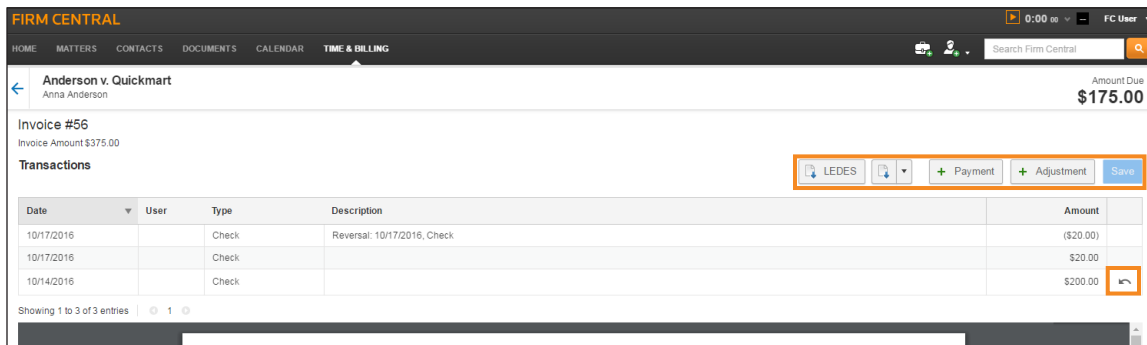


Click an **Invoice Number** to preview the invoice. The Invoice Preview page displays a list of Transactions as well as a PDF preview of the invoice.

Note: Any outstanding balances from previous invoices will automatically appear on any new invoices you create.

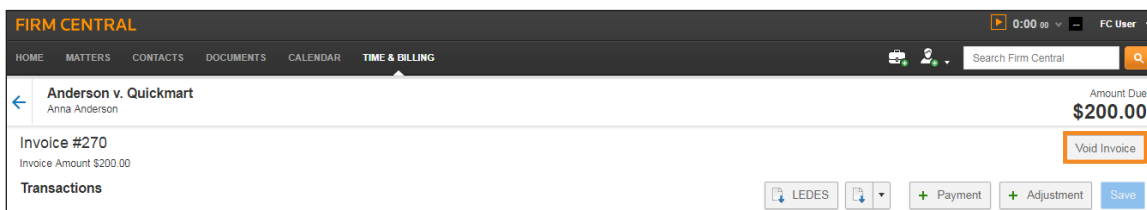
- Click the **LEDES** button to download the invoice in LEDES format. You have the option to save a copy of the LEDES file to the matter folder in Time & Billing.
- Click the **Delivery** button to print or download the invoice.
- Click the + **Payment** to add a payment to the invoice. Be sure to click **Save** after you add it. If the payment is not made in full the preview invoice **will not** update to the new balance.

- Click the **+ Adjustment** button to add a credit or write off to the invoice. Be sure to click **Save** after you add it. These adjustments **will not** appear in the preview invoice.
 - Time & Billing does not allow you to delete an invoice. If there is a problem, you can either void the invoice or write it off. To write off the invoice, click the **+ Adjustment** button and select *Write Off* from the drop-down. It is a good idea to print or download the invoice before writing it off in case you need to add the time entries in the invoice back into Firm Central, as you cannot view the invoice after you write it off.
- The  button in the Transaction table indicates the ability to reverse a payment transaction. Click the icon to reverse the transaction. A new row will appear with a default description. You cannot change the type or the amount for the transaction. Click **Save** to finalize the payment reversal. This adjustment **will not** appear in the preview invoice.



- If you have not made any transactions on an invoice, you can void it using the **Void Invoice** button. If you have completed transactions on an invoice, you will need to reverse them before you can void the invoice. Once you click **Void Invoice**, the Void Invoice window will appear. Add an *Invoice Description* and click **Save**. Once you do this, the invoice will revert back to a pre-bill with all entries and adjustments still present on the pre-bill.

Note: Invoices made for a contingency matter cannot be voided. You must complete a *Write Off* transaction instead to void the invoice.



THE TRUST & RETAINERS TAB

The Trust & Retainers tab allows you to create, view, and record deposits and disbursements for accounts for your firm. In regards to Time & Billing functions, all processes are the same for matters and clients with accounts; you can add time and expense entries, run pre-bills and invoices in the ways described in this guide. Instead of taking payments as invoices come due, you have the option of drawing from an account for the client’s invoices.

Create an Account

Click the **+ Account** button to create a trust account.

- Enter the *Client, Matter, Account Type, Account Name,* and *Date Opened.*
- Add the *Initial Balance* and an optional description. This initial balance can be edited up until the first transaction is posted.

- If you wish, you can add a **Minimum Balance Amount** for the account.
 - If you enter a minimum balance, you can select the **Include Account Replenishment Message on Invoice** check box to add this message to invoices for this account when the minimum balance is reached.
- Select the **Auto deduct payments** check box to automatically deduct the balance of the account as payment when you run invoices for this matter. Only one account can be used to auto deduct payments, and you must select it from the drop-down. Otherwise, you will need to manually make payments on invoices and select the account as the **Payment Type**.
- Optionally, select to **Include account balance on invoice**.
- Click **Create**.

Note: You can add up to five accounts for each matter. Each account must be of a different type, however (you cannot add two trust accounts to one matter, for example).

You can also create an account for a matter as you are creating it in the Billing Information section of a New Matter form. Or, you can add one through editing the Matter Details on the Matter Profile page.

Review Accounts

The Trusts & Retainers tab displays all open accounts for your firm in table format. The number next to the **Filter by:** drop-down indicates how many accounts are displayed.

- Use the **Search Accounts** field to quickly locate an account.
- Use the **Filter by:** drop-down to display or hide account types.
- Select the **Include Closed Accounts** check box to show all accounts for your firm.
- Click the **Delivery** icon to print, download, or export a list of accounts and their transactions. Select the check boxes for the trust accounts you want to deliver, and click the button. The file will be downloaded, printed, or exported in PDF format.
- If an account has met the established minimum balance, an icon will appear in the table along with the minimum balance.

FIRM CENTRAL 0:00 00 FC User

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ADMIN

Time Entry Expense Entry Pre-Bills Payment & Invoices **Trusts & Retainers** All Accounts Reports

Trusts & Retainers Balance
\$193,253.54

Search Accounts Filter by: All Account types (53) Include Closed Accounts + Account

Account Name	Client	Matter	Matter ID	Account Type	Balance
Trust 3	1 Call Does It All Inc.	Thomas Purchase	1224	Trust Account	50.00 Minimum 100.00
Slip and Fall Trust	1 Call Does It All Inc.	Slip and Fall	1072	Trust Account	430.00
Micah Freije General Matter	A. Micah Freije	General (hourly) with Trust	0957	Trust Account	4,757.86
Auto Trust Account Trust	A. Micah Freije	Auto Trust Account	1070	Trust Account	1,200.00
Flat Fee for A. Micah Freije	A. Micah Freije	Flat Fee Work	0961	Trust Account	500.00
Syd Contingency Trust	A. Sydney Freije	Syd Contingency	1213	Trust Account	1,009.10

Click an **Account Name** to view and add transactions for the account.

- To add a deposit, disbursement, or adjustment, click the **+ Transaction** button. A new row will appear in the Transaction table. Add all relevant information, and click **Save**. The balance will update automatically.
 - If a matter has multiple accounts, it is possible to transfer money between them using the **+ Transaction** button. In the **Type** drop-down, the other accounts will be available to select.

Note: Reversals of payments from other accounts will automatically be reversed in both account balances and will appear in the Transactions table.

- Click the **Delivery** button to print or download the list of transactions.
- To close the account, click the **Gear** icon, and then click **Close Account**. The balance must be disbursed in order to close the account. The account will disappear from the Trust & Retainers tab, and the transactions will be archived in the matter folder.
- To change the account name or add or change the minimum balance on the account, click the **Gear** icon, and then click **Edit Account**.
- Use the **Search Transactions** field to quickly find transactions for the account.

FIRM CENTRAL 0:00 00 FC User

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

QUICKMART ACQUISITION TRUST Trust Balance
\$4,500.00
Minimum \$500.00

Date Opened: Oct. 17, 2016 Open
Quickmart Acquisition (1440 - 1095) Anna Anderson

Search Transactions + Transaction Save

Date	User	Type	Invoice #	Description	Debits	Credits	Balance
10/17/2016		Type	Invoice #	Enter a description			4,500.00
10/17/2016		Disbursement			500.00		4,500.00
10/17/2016		Deposit		Opening Balance		5,000.00	5,000.00
					\$500.00	\$5,000.00	\$4,500.00

Showing 1 to 3 of 3 entries | 1

THE ALL ACCOUNTS TAB

The All Accounts tab shows all open accounts for your firm. This includes matters with and without trust accounts. While the Payment & Invoices and Trust Accounts tabs allow you to add payments and transactions for invoices, the All Accounts tab contains statements for these accounts, and allows you to easily track payments, adjustments, reversals, and balances on all invoices and trust accounts.

- Use the *Search All Accounts* field to quickly find an account.
- Select the *Include open matters with zero balances* check box to view all accounts for your firm.
- Click the **Delivery** button to print or download account statements. Select the check box for each account you want to deliver before clicking the icon. The files will be downloaded or printed as PDFs.
- The *Trust Balance* column will be populated for matters that have a trust account. Clicking the **Balance** will take you to the same Transactions page that appears in the Trust Accounts tab.

Client	Matter	Matter Balance	Trust Balance
A. Micah Freije	Auto Trust Account	0.00	3,380.00
ABC Group	workers comp	0.00	10,000.00
Ann Smith	Smith Auto Accident	3,118.75	1,500.00
Anna Anderson	Quickmart Acquisition	0.00	4,500.00
Anna Anderson	Anderson v. Quickmart	175.00	
Bill Campbell	Apple Stock Vest	10,150.00	
Cynthia Brady	Non Billable Matter	0.00	500.00
Cynthia Brady	Brady Howell Litigation	2,768.00	9,740.00

View a Matter Balance

Click a **Matter Balance** to view all transactions and invoices created for that matter.

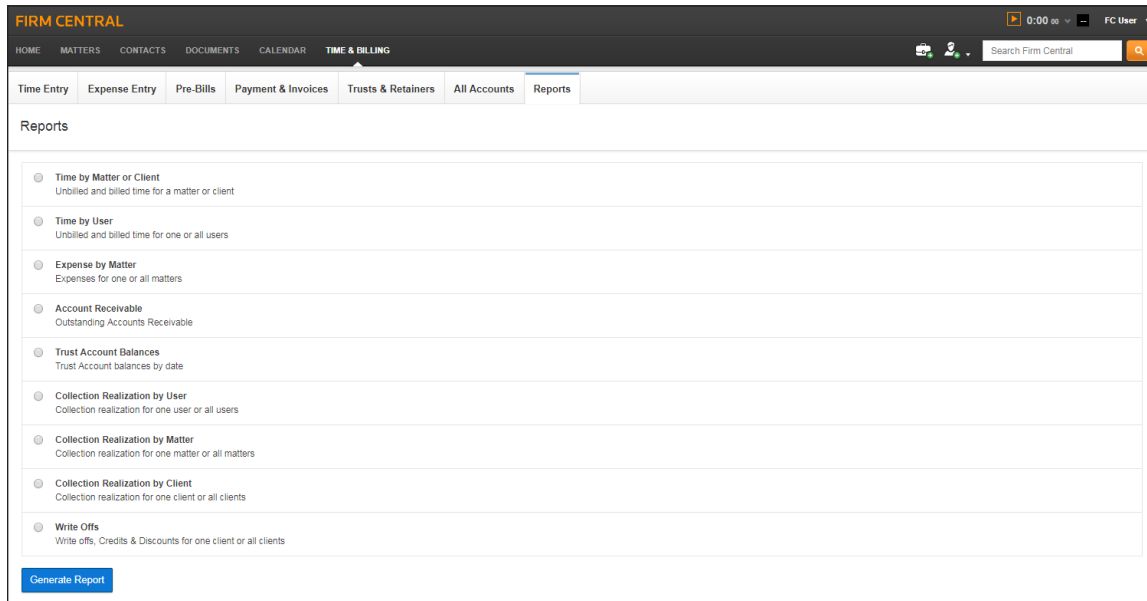
- Select a date range to narrow the transactions.
- Click the **Delivery** button to print or download an account statement for this matter.
- Click an **Invoice Number** to view that invoice on the Invoice Preview Page in the Payment & Invoices tab.

Date	User	Type	Invoice	Description	Charges	Credits	Balance
10/12/2016	KEFT	Trust Account	125	Reversal: 10/12/2016, KEFT, Trust Account, Corrected payment from trust account		(250.00)	2,768.00
10/12/2016	KEFT	Trust Account	125	Corrected payment from trust account		250.00	2,518.00
10/12/2016	KEFT	Trust Account	125	Reversal: 10/12/2016, KEFT, Trust Account, Manual payment from trust account		(400.00)	2,768.00
10/12/2016	KEFT	Trust Account	125	Manual payment from trust account		400.00	2,368.00
08/30/2016		Invoice	125	Invoice	420.00		2,768.00
08/11/2016		Invoice	116	Invoice			2,348.00
07/25/2016	KEFT	Payment	105	Full payment		600.00	2,348.00
06/23/2016		Invoice	105	Invoice	600.00		2,948.00
06/13/2016	KEFT	Trust Account	77	Correct Payment amount #77		260.00	2,348.00
06/13/2016	KEFT	Trust Account	77	Reversal: 6/12/2016, KEFT, Trust Account, payment of invoice #77		(206.00)	2,608.00
06/13/2016	KEFT	Trust Account	77	payment of invoice #77		206.00	2,402.00
05/23/2016	KEFT	Credit	77			20.00	2,608.00
04/26/2016	KEFT	Write Off	77	Write off 10% of invoice #77		292.00	2,628.00
04/26/2016		Invoice	77	Invoice	2,920.00		2,920.00
02/25/2016	KEFT	Trust Account	34			821.42	0.00
02/23/2016		Invoice	34	Invoice	821.42		821.42
02/12/2016	KEFT	Trust Account	14			799.92	0.00
01/08/2016		Invoice	14	Invoice	799.92		799.92

THE REPORTS TAB

The Reports tab allows you to download several different reports that pertain to the firm's financial state. These reports help you gain an overall idea of the efficiency and outlook in various aspects, such as receiving payments, time and expenses with matters and clients, and discounts.

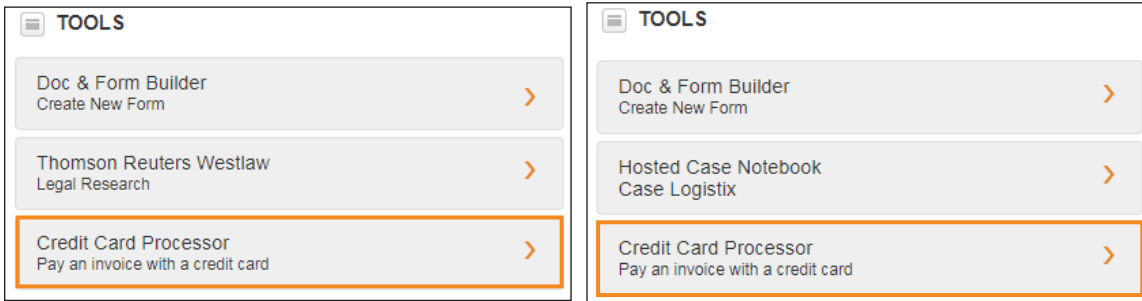
Click the radio button next to the report you want to view, and click **Generate Report**. After providing specific information for that report, click **Export**. All reports will download as a .csv file, where they can be edited and saved as you wish.



- The **Time by Matter or Client** report records the billed and unbilled time for a specific matter or client.
- The **Time by User** report records the billed and unbilled time for one user or all users in your firm.
- The **Expense by Matter** report records the expense entries for one matter or all matters.
- The **Account Receivable** report records all outstanding amounts owed in a specific date range.
- The **Trust Account Balances** report records the balances of all open trust accounts for a specific date.
- The **Collection Realization by User** report records the collection realization, or the percentage of the balance that has been collected, for one user or all users in a specific date range.
- The **Collection Realization by Matter** report records the collection realization, or the percentage of the balance that has been collected, for one matter or all matters in a specific date range.
- The **Collection Realization by Client** report records the collection realization, or the percentage of the balance that has been collected, for one client or all clients in a specific date range.
- The **Write Offs** report records the write offs, credits, and discounts for one client or all clients in a specific date range.

Credit Card Processor

Firm Central has partnered with ClientPay to bring credit and debit card processing for you and your organization at no additional cost. Access ClientPay by clicking the **Credit Card Processor** button in the Tools widget on the Home page or a Matter Profile page.



ClientPay’s website will open in a new tab. From here, you can sign up or log in to ClientPay to begin.



Currently, Firm Central and ClientPay **are not synced**. If you process a payment for an invoice or complete a transaction in ClientPay, you will need to manually add a payment or transaction in Firm Central on the Payments & Invoices tab, described above.

If you run into technical issues or need support using ClientPay, email info@clientpay.com or call 855-299-0476.

LOOKING FOR MORE INFORMATION?

For assistance using Firm Central, call 1-888-287-8537

For free reference materials, visit <http://legalsolutions.thomsonreuters.com/law-products/solutions/firm-central/support>

