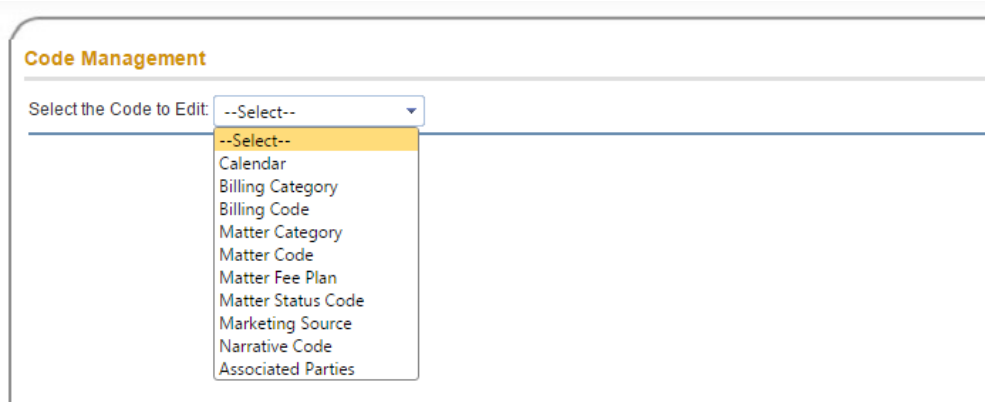
CODE MANAGEMENT

GO TO MAIN MENU SYSTEMS--> # 3: Maintain billing & other codes



Each code page contains a check column. Uncheck the categories and codes that you will never use. For example: All checked categories appear in a list of matter types when installing a new client-matter.

1. Calendar codes are defined by type of expected task. They are color coded to help you easily identify the task.
    a. Appointment, Task Management, Court appearance, Trial, and Office Meetings
2. Billing Category Seldom needs editing. Primary categories are:
    a. Time billing, Flat rate billing (task based), Expenses: (1) in-house, and (2) Vendor, Outside counsel and expert witnesses. Automated billing includes the following parameters:
        i. 1/10th hour, 1/4th hour, and Real time, and use the hour rate established for each timekeeper in the Rate Code table.
3. Billing Codes. Edit, add, delete and uncheck what you don't need – but want to leave in table in case you need it later.
4. Case / Matter Categories: The system comes complete with all 34 Case / Matter categories defined by the ABA. If you never process **Immigration**, uncheck that.
5. About 240 Case / matter codes are attached to the Case/Matter categories. Keep what you need, uncheck others. IF you unchecked a Case/Matter Category, case codes attached to that category do not appear in this list.
6. Fee plans usually do not need editing, but are available if you want to add, edit or delete.
7. Status Codes seldom need editing, but are available if you want to add, edit or delete
8. Marketing Source. Insert all advertising, cost start-date and expire-date. The system will generate a report on revenue created by each. One selection is Referrals. This also may be edited as to what type of referral, and you may insert any number of sources.
9. Narrative Codes: The code defines the job at hand, and you may edit, add, delete as you wish. Do not delete "Email". This narrative code automatically opens the email section where you write the email, select recipients, and add attachments. When finished, it automatically bills the file *(unless you make it non-billable)*.
10. Associated Parties: Add, edit, and delete Categories.