

Edit Billing Categories & Billing Codes

Code Management

Select the Code to Edit:

[+ Add new record](#)

Active	Sort Order	Code	Description		
<input checked="" type="checkbox"/>	A	T	Time		
<input type="checkbox"/>	B	F	Flat/Rate [Task based]		
<input checked="" type="checkbox"/>	C	E	Expense		
<input checked="" type="checkbox"/>	D	O	Outside Counsel or Experts		
<input checked="" type="checkbox"/>	<input type="text" value="E"/>	<input type="text" value="L"/>	<input type="text" value="Previous Balance"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	M	X	Delinquency [Interest on past due]		
<input checked="" type="checkbox"/>	M	P	Payment		
<input checked="" type="checkbox"/>	M	R	Retainer		

[+ Add new record](#) Refresh

TO EDIT CLICK PENCIL - SAVE WITH CHECK MARK. USE RED MARK TO IGNORE CHANGES USE 'X' TO DELETE AN ITEM

The following setup routines should to be completed before you begin using the system.

1. Enter User Information: (Page 7)

Be sure and Insert user Initials for "short name".

The short name is used to identify the user in billing, calendar & tasks, reports, etc.

2. Enter Hourly rates for all timekeepers (pages 8 & 9)

Up to 20 hourly rates may be inserted for each timekeeper and labeled with a code and description. For example: rate code "09" assigns an hourly rate of zero per hour and is used for contingency matters. Useful in tracking hours of all timekeepers on any matter without charging time. You may assign hourly rates for Family Law, Business Law, etc.



An hourly rate codes is assigned to a matter when the matter is entered. Each persons hourly rate established for that Rate Code is used.

3. General Billing descriptions and codes are already installed.

See pages ___ & ___ in this manual on how to add and edit.

4. There are four billing categories:

T - Time Billing

F - Flat rate (task based billing)

E - Expenses: Internally generated and external (vendors)

O - Experts and outside counsel (1099 entries)

Expense Examples:

Enter filing fees specific to each court and name the court. This insures consistency, and prevents numeric errors.

Sprint County Clerk of Court - Filing Fee \$350.00