# THOMSON REUTERS FIRM CENTRAL

# TIME & BILLING QUICK-START GUIDE

FEBRUARY 2016

the answer company™

THOMSON REUTERS®

## Notes

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## HELP AND SUPPORT

For assistance, call Customer Service at **1-888-287-8537**,
or call Customer Technical Support at **1-888-287-8537**.

## Notes

**Within Thomson Reuters Firm Central™ Practice Management, the Time & Billing section allows users to track time to Matters and cases, create and review Pre-Billing, and finalize and send invoices. In addition, payments received can be entered and tracked, and trust accounts can be added and managed – all in one place.**

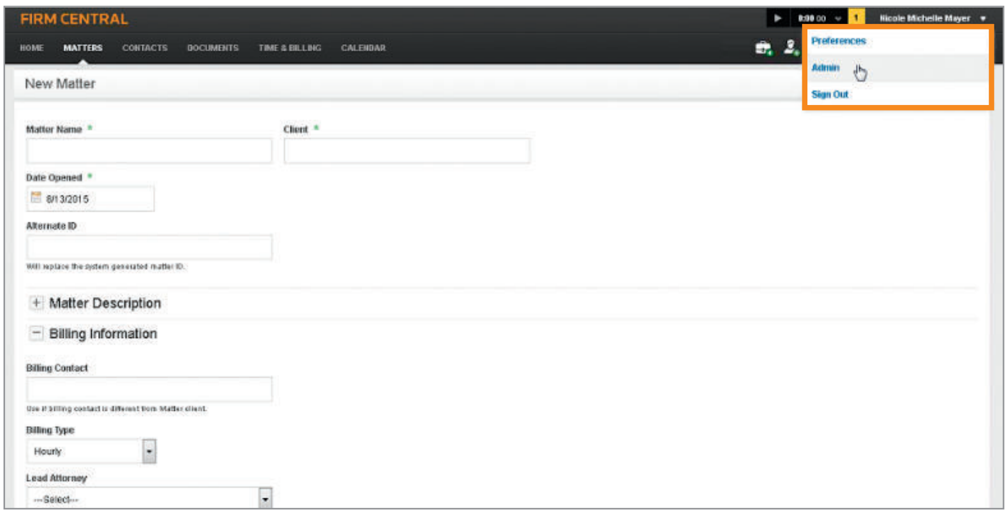
# 1 ADMINISTRATION AND USER PREFERENCES SETUP

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.

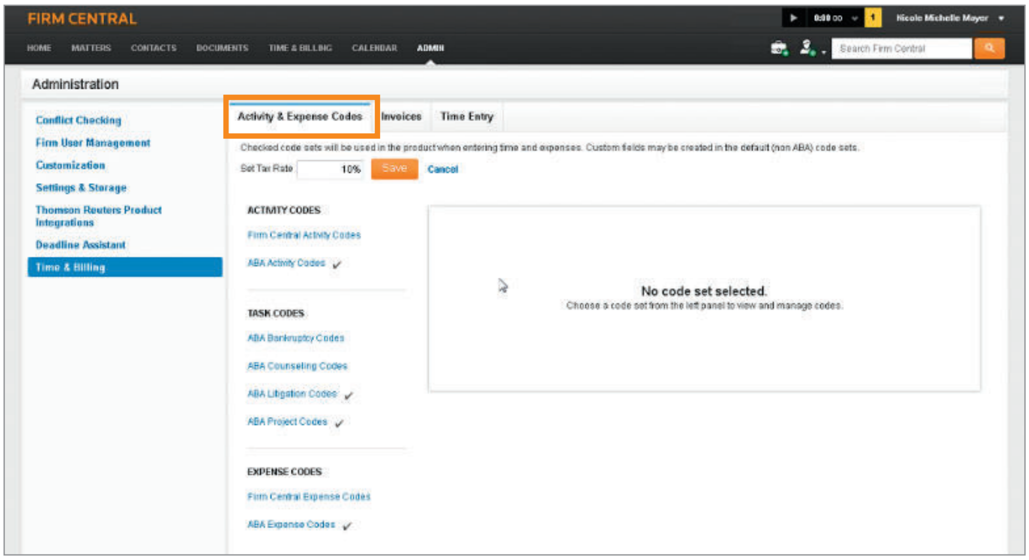
## Admin Preferences

To access the Admin setup, click the drop-down menu in the upper-right-hand corner under your username and select Admin.

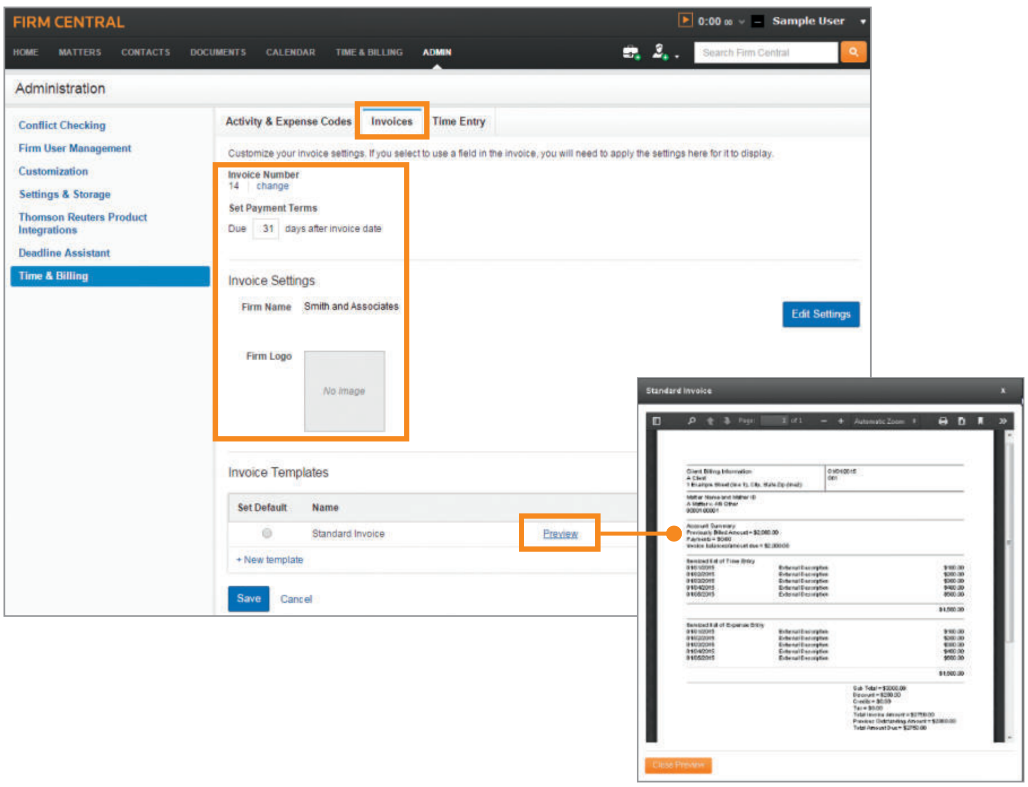
**NOTE:** Only users who have Admin access level will be able to access this section.



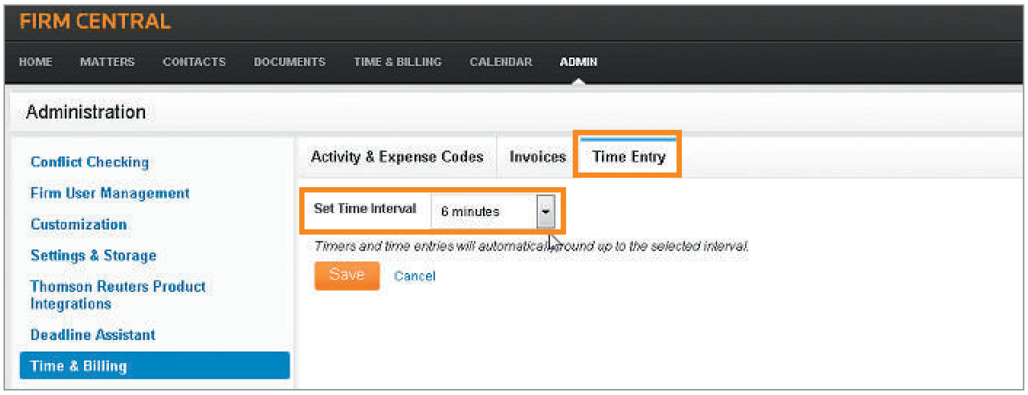
Within the Admin section, select **Time & Billing**. Here, defaults can be set for your firm. Under the Activity & Expense Codes tab, options include setting default Tax Rates and setting default Activity Codes, Task Codes and Expense Codes. Selected codes can be viewed and managed in the right panel.




Under the Invoices tab, information to be included on invoices can be set, including the invoice number and your firm's name, address and logo. The user can also enter the payment terms to be applied to each new invoice. New templates can be created and saved for use during the invoicing process. You can preview an invoice template by selecting **Preview**.

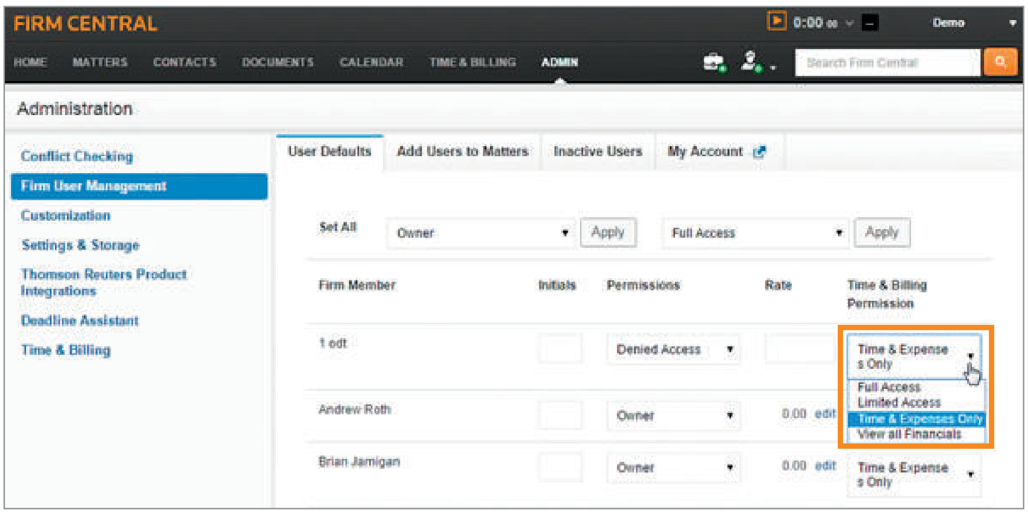


Under the Time Entry tab, your firm's preferred interval for tracking time can be set. Any time entered in Time & Billing will automatically round up to the selected interval. Click **Save** to confirm your selection.




A default permission for each firm user can also be set under the Admin tab. Within the Admin section, select **Firm User Management**. Here, each firm member's Initials, Permissions, Default Billing Rate and Time & Billing Permissions can be set. There are four permission levels (users default to Time & Expenses Only):

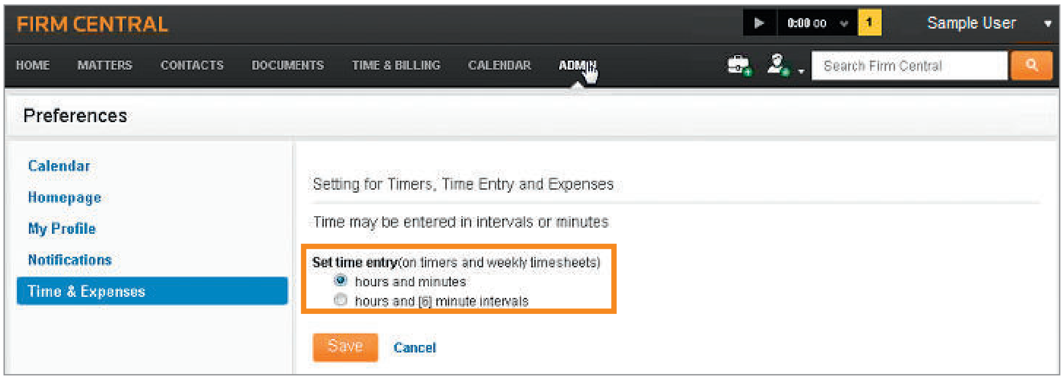
- **Full Access** – This allows the user to perform all actions related to Time & Billing.
- **Limited Access** – This allows the user to add time and expenses on behalf of another user and to be able to view Pre-Bills.
- **Time & Expenses Only** – This will limit the user's view only to where the user can enter time. Under this permission level, there is no access to Pre-Bills, Invoices, Trust Accounts, etc.
- **View All Financials** – This will allow the user to access all 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 to perform any transactions.



## User Preferences

To access the User setup, click the drop-down menu in the upper-right-hand corner under your username and select Preferences.

In the Time & Expenses tab, select your preferred method of time entry for timers and on weekly time sheets – actual time or billing-interval time. Choose the applicable radio button and click Save to confirm.

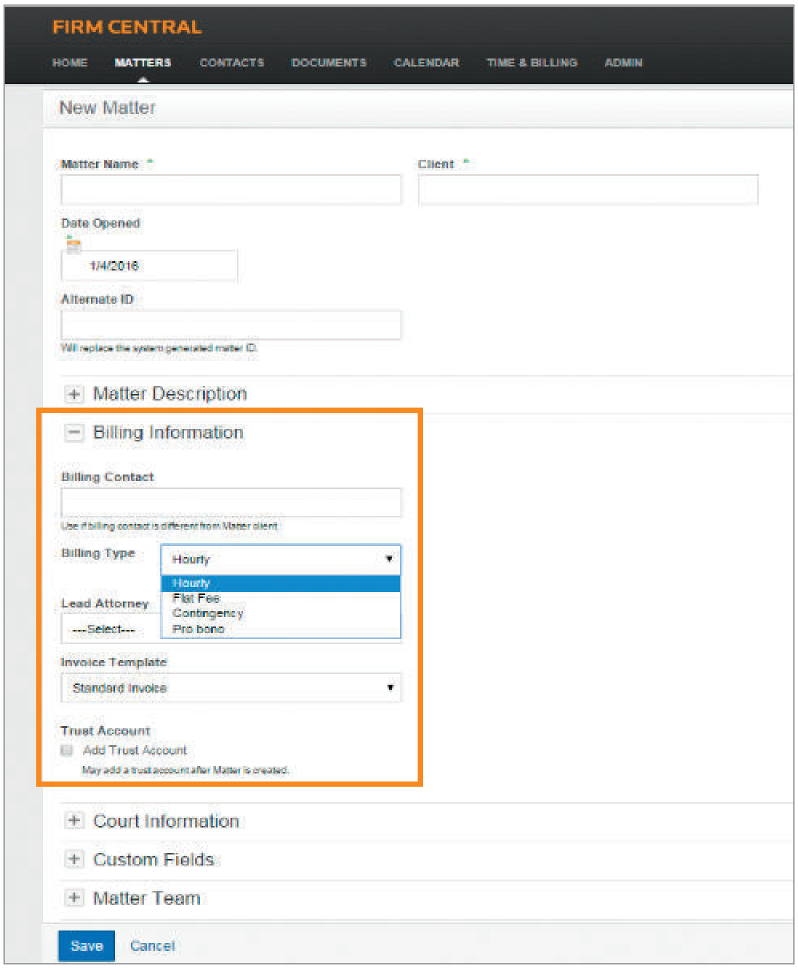


# 2 Matters Setup: Time & Billing

When creating new Matters or editing existing Matters, the user can set or change Time & Billing defaults that apply to the individual Matter.

## Creating a New Matter: Time & Billing Setup

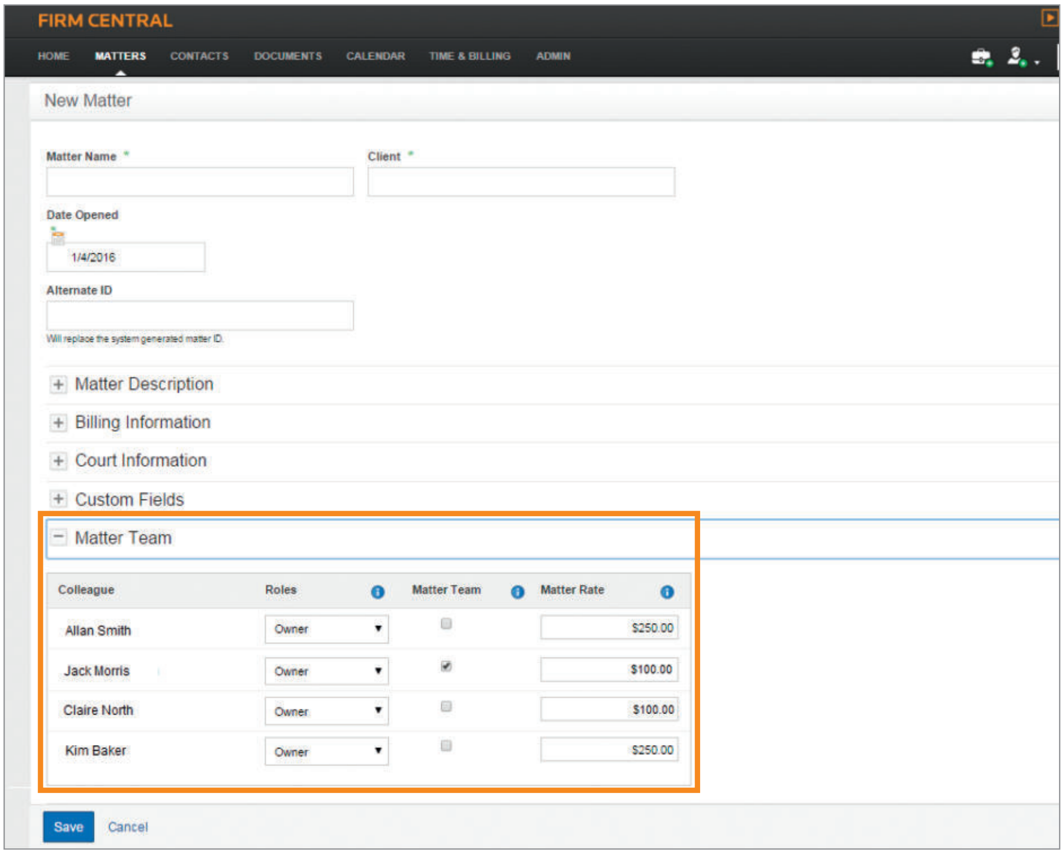
To create a new Matter, click the **Matters** label located in the banner menu, then select the **+ New Matter** button near the upper-left-hand corner. In the new window, the user will be able to enter information to create a new Matter. For Time & Billing setup, expand the Billing Information section by clicking the **+** icon next to Billing Information. From here, the user can select the billing type – Hourly, Flat Fee, Contingency or Pro Bono – that will apply to the Matter. The user can also select the Lead Attorney and Invoice Template to use, and may add a Trust Account (if applicable).



To manage those assigned to a Matter, expand the Matter Team section by clicking the **+** icon next to Matter Team. From here, the user can select team members and assign roles. In addition, a Matter-specific rate can be entered.

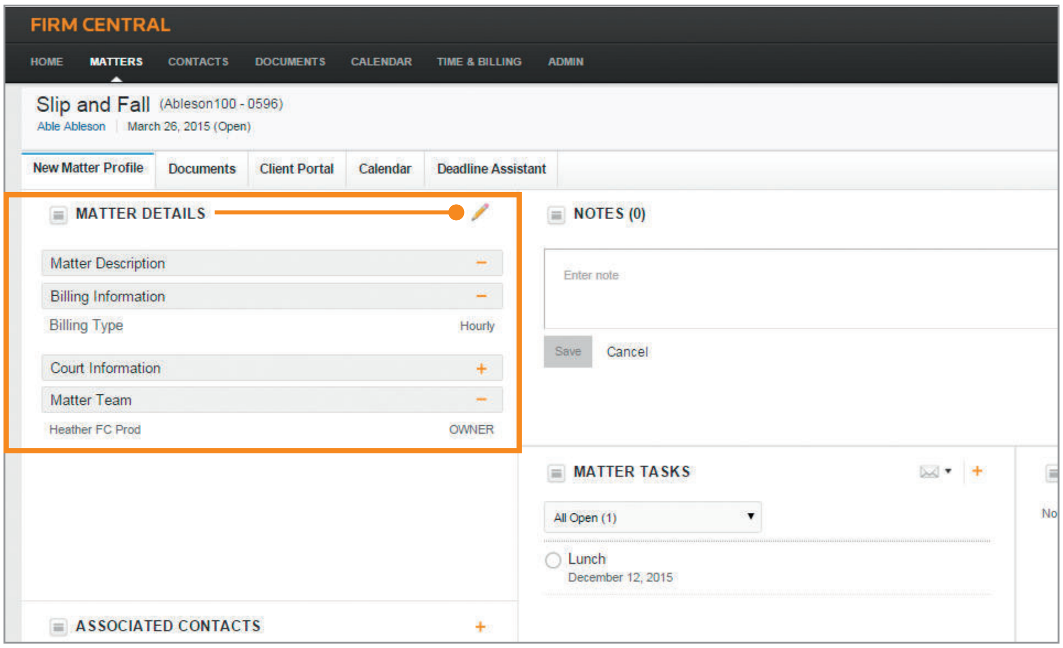
**NOTE:** The team member's default rate will apply unless changed on this screen.

When finished, click Save.



## Editing an Existing Matter: Time & Billing Changes

The user can view the Time & Billing settings for a particular Matter by selecting the desired Matter from the list present in the Matters section. Once selected, the Matter Profile will appear, displaying customizable widgets. In the MATTER DETAILS widget, the Billing Information and Matter Team information can be viewed by expanding each section. To edit the Matter Details, select the Pencil icon in the upper-right-hand corner of the widget. This will open the Edit Matter window, which will show the same expandable sections as the New Matter window available for editing, including Billing Information and Matter Team.



## Notes

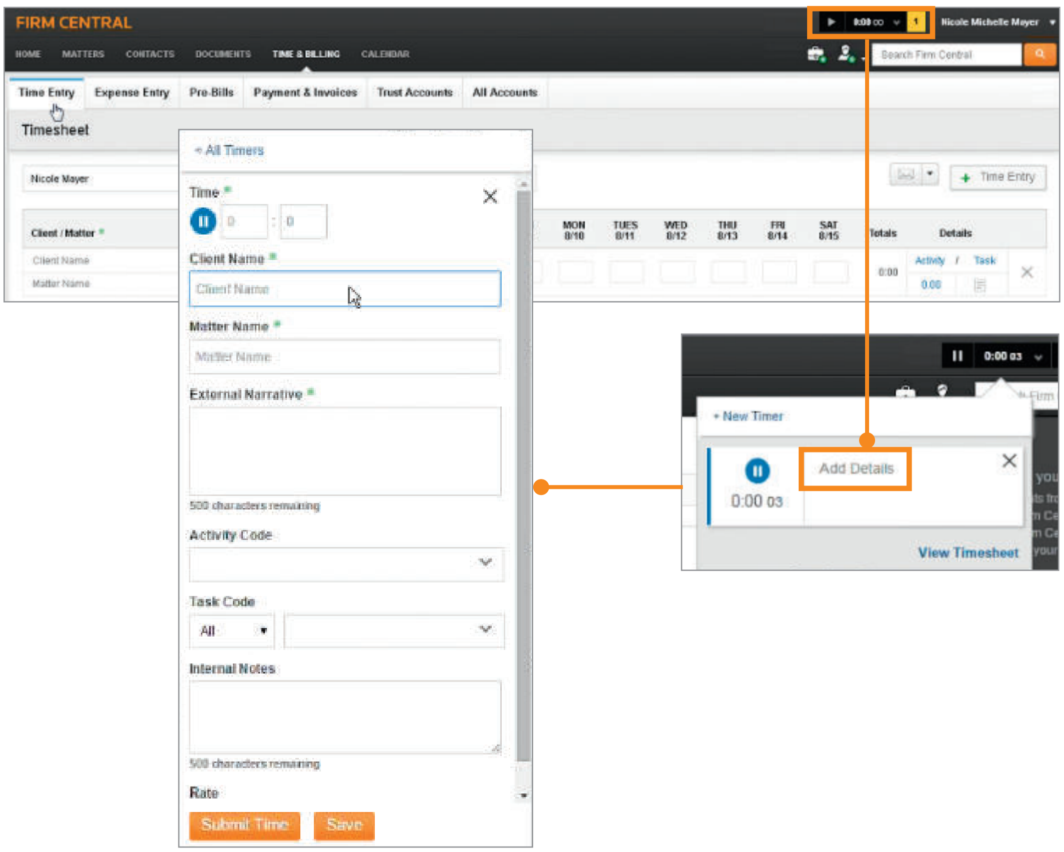
# 3 Using Time & Billing

When using Time & Billing, there are a number of functions the user can perform, from entering time to finalizing invoices and tracking payments. To begin, click the **Time & Billing** label located in the banner menu near the top right of the page.

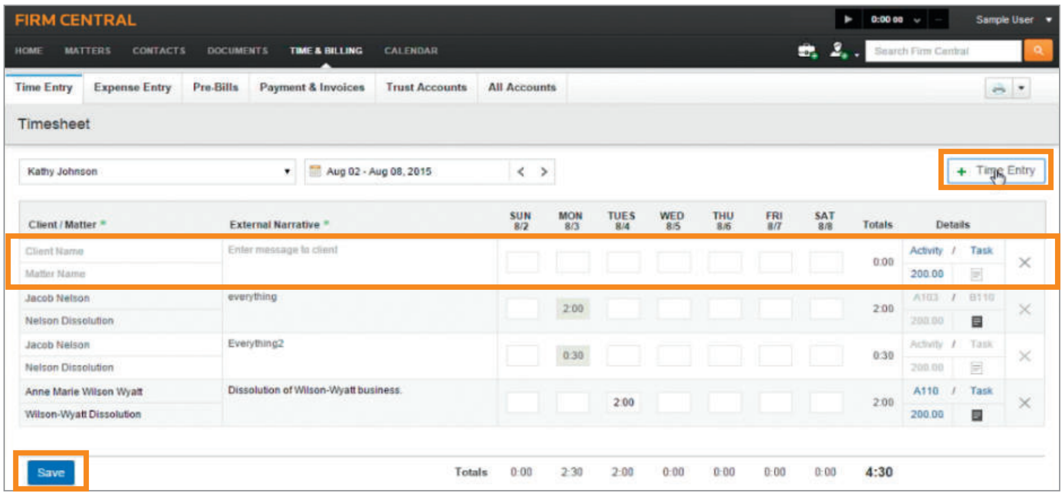

## Using the Timer Function – Recording Your Time

There are two ways to enter time in Time & Billing – using a Timer to track work in live time, or by manually entering time later. Time can be tracked under the Time Entry tab.

1. To track as you go, the Timer is located in the upper-right-hand corner. Click the **Play** button to start tracking time; when completed, click the **Pause** button. A pop-up will appear below the Timer with a section to enter information about the time spent. Click **Add Details** to enter a description. A new pop-up will appear, where detailed information can be added. When finished, click **Submit Time**.



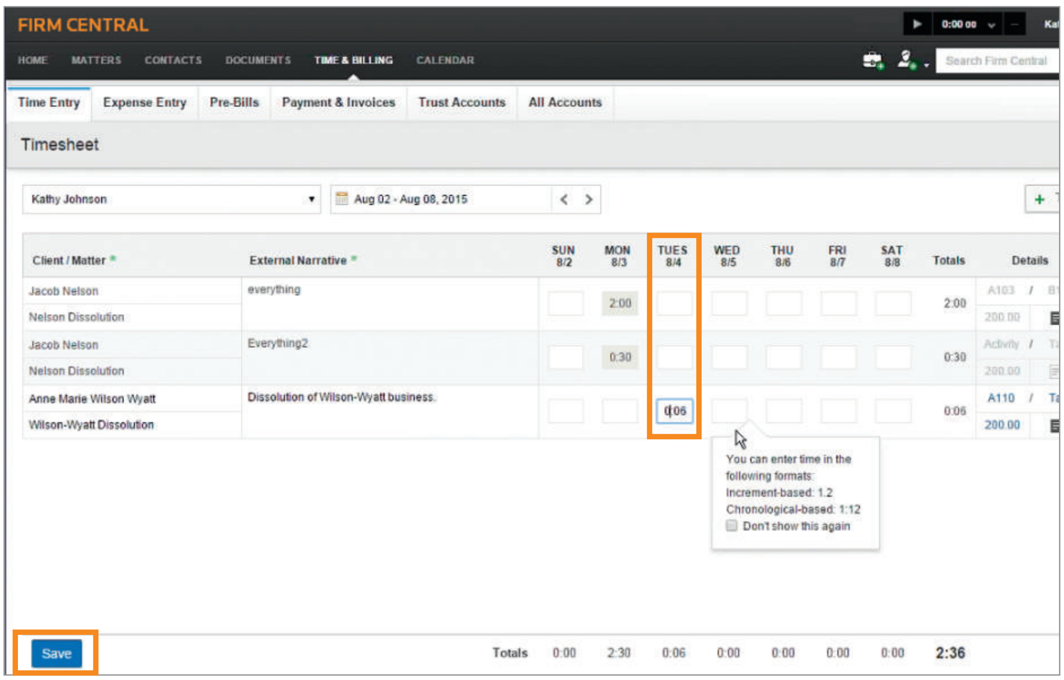
2. To add an entry at a later time, click the **+ Time Entry** button near the upper-right-hand corner of the Timesheet. A new row will appear where detailed information can be entered. When complete, click **Save** in the lower-left-hand corner. Under the Details section, the applicable billing rate will appear, or FLAT for a flat fee agreement or CONT for a contingency agreement.




## Reviewing and Editing Your Time Entries

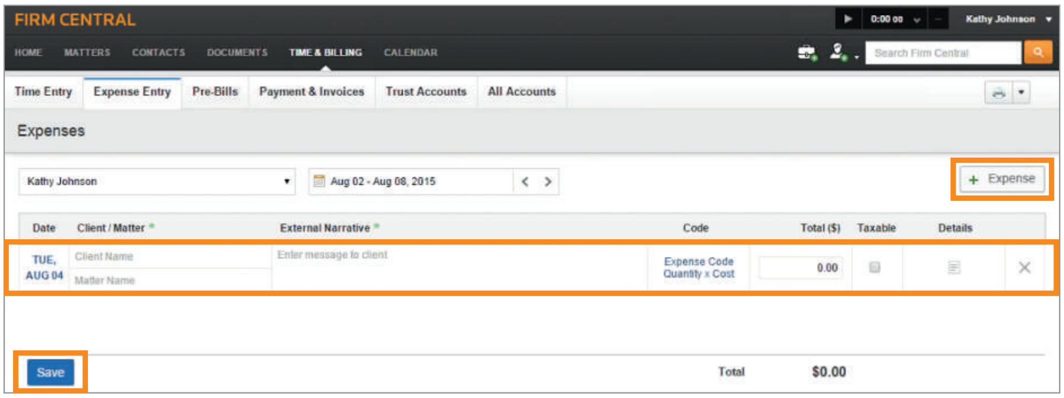
To review your time entries for the week, open the **Time Entry** tab. The Timesheet will display with all applicable entries.

To edit a time entry, locate the desired row. For the specific date, click on the desired time box. This will open it for editing, and time can be entered as either in increment-based or chronological format. When complete, click **Save** in the lower-left-hand corner.



## Entering Your Expenses

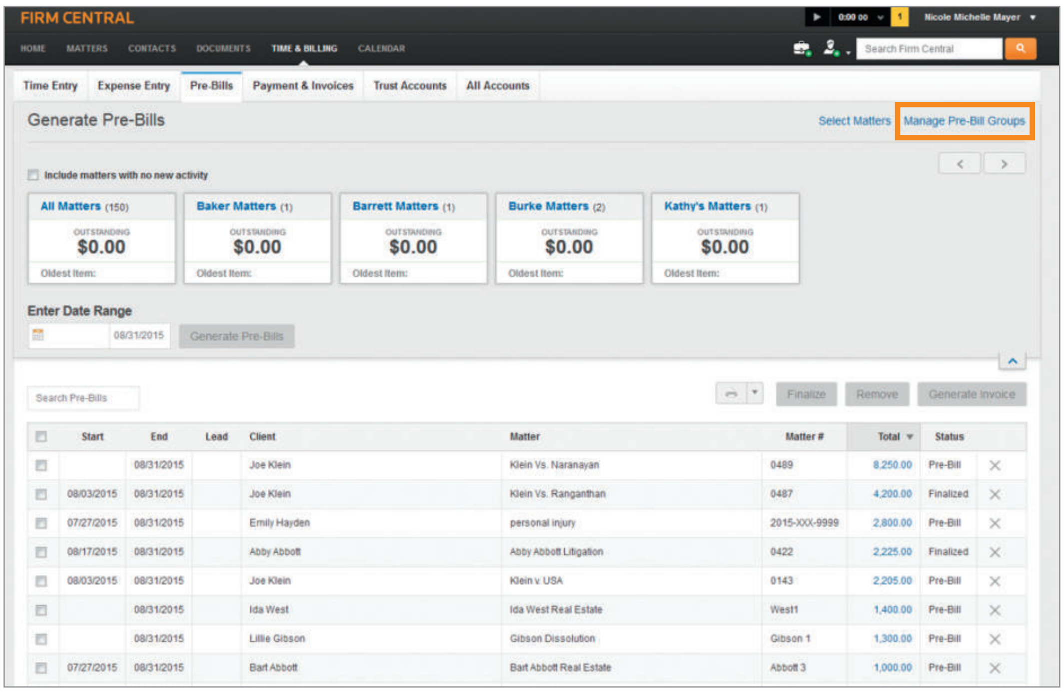
To enter an expense associated with a Matter, navigate to the Expense Entry tab. New expenses can be added by clicking the **+ Expense** button in the upper-right-hand corner. A new row will appear, and detailed information can be entered. When complete, click **Save** in the lower-left-hand corner. To edit an entry, click the appropriate information in the desired row to update. When finished, click **Save**.



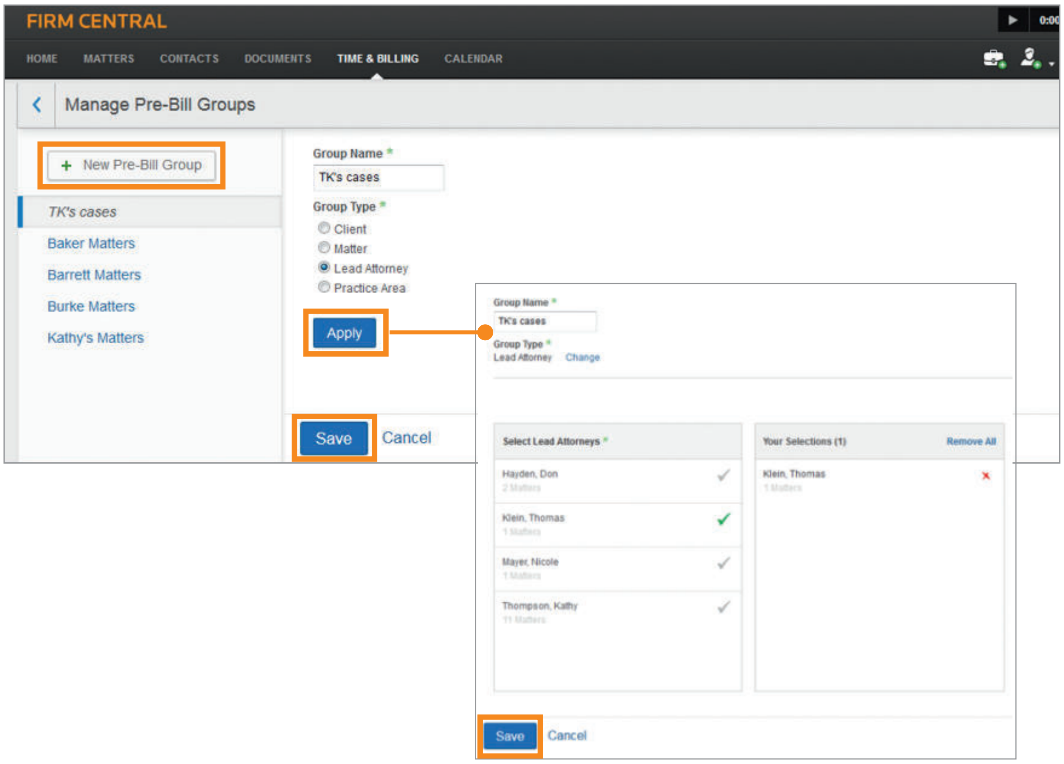

## Creating and Managing Pre-Bill Groups

In Time & Billing, separate Matters can be grouped together when creating and reviewing Pre-Bills. To begin, access the Pre-Bills tab.

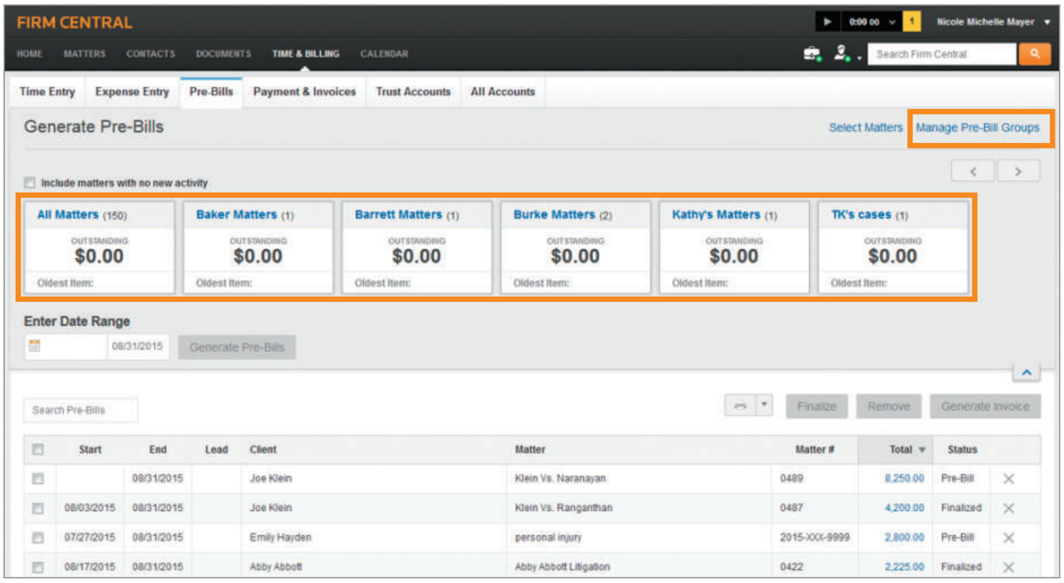
To create a Pre-Bill Group, click the **Manage Pre-Bill Groups** link near the upper-right-hand corner.



On the next screen, click **+ New Pre-Bill Group** near the upper-left-hand corner. Enter the Group Name and select the Group Type. Pre-Bills can be organized by Client, Matter, Lead Attorney or Practice Area. When complete, click **Apply**. Based on the selected group type, new information will display to allow customization of the Pre-Bill Group. When ready, click **Save** near the bottom left of the window to complete the process.



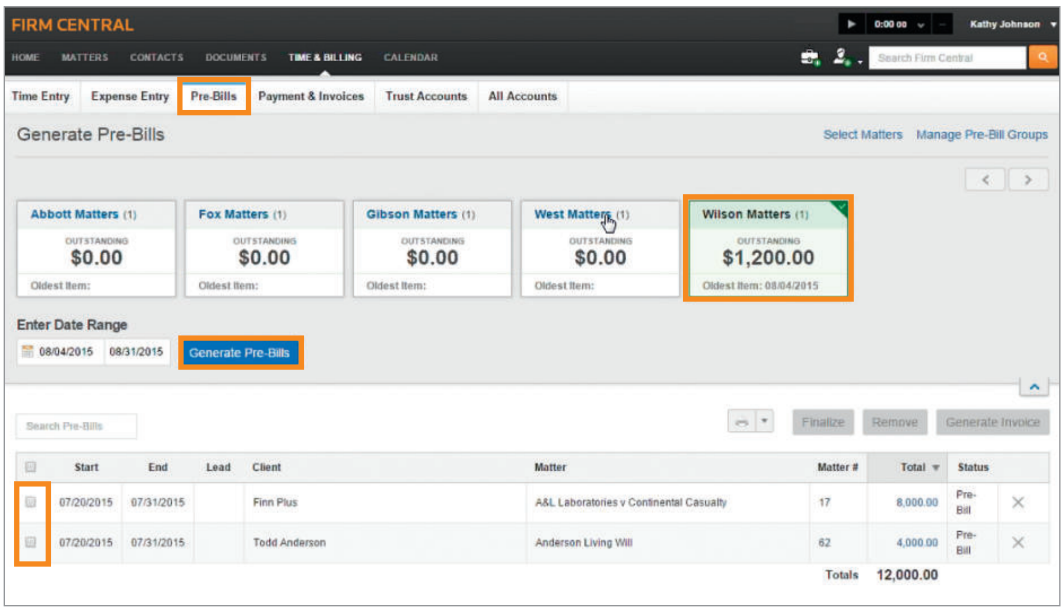
Once created, Pre-Bill Groups display across the top of the Pre-Bills tab. Pre-Bill Groups can be edited through the Manage Pre-Bill Groups link.



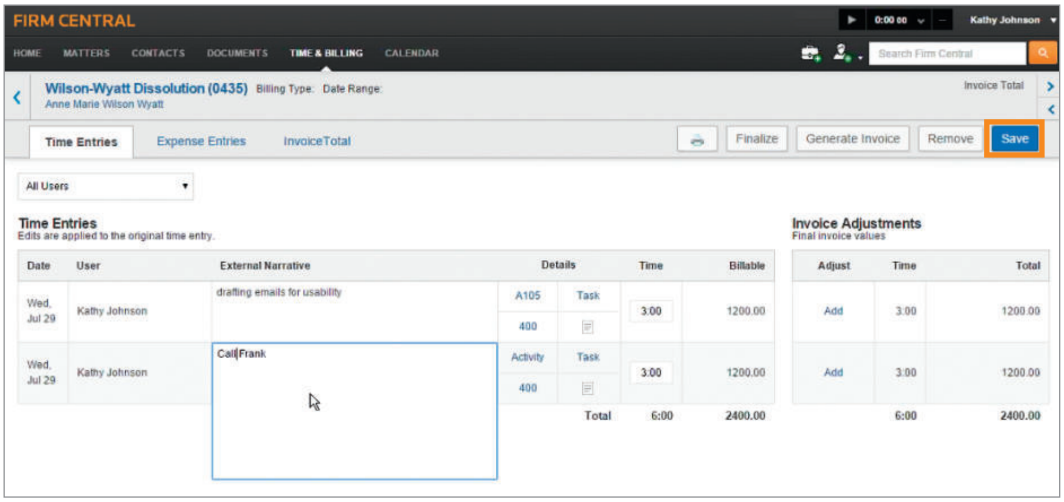
## Generating and Reviewing Your Pre-Bills

When the time comes to review your Pre-Bills, navigate to the Pre-Bills tab. Here, all the Matters for the firm will be displayed near the top of the page in separate boxes showing the current outstanding bill totals. Note that once a time entry is added to a Pre-Bill, it cannot be edited.

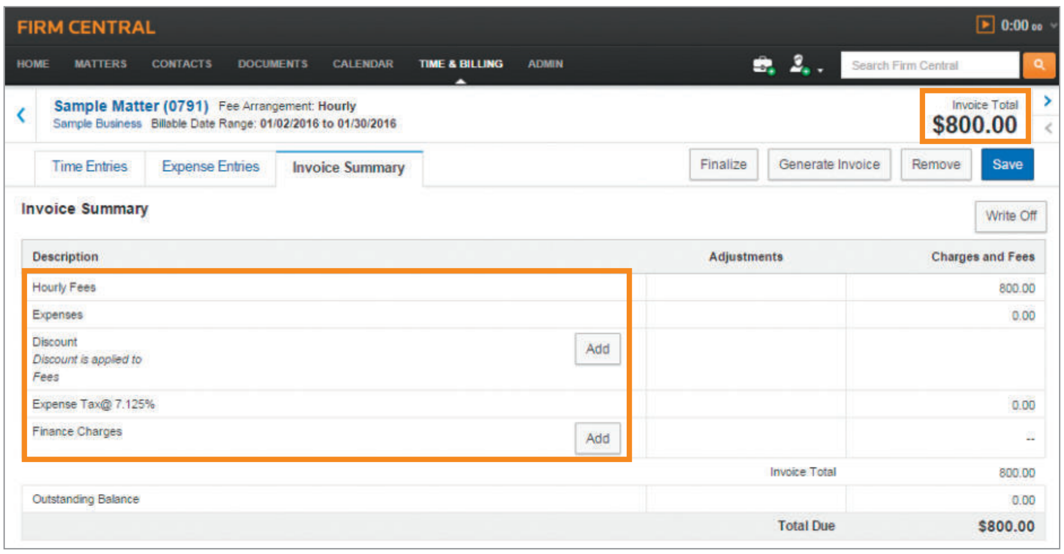
To create a Pre-Bill, select one of your predefined Pre-Bill Groups, which will shade green with a check mark to indicate selection (more than one can be selected at a time). You may also generate a Pre-Bill by selecting the box next to the client (as seen at the bottom of the screen). After verifying the desired date range, click Generate Pre-Bills.



Once created, the Pre-Bill will appear in the list on the bottom half of the window. To review a particular Pre-Bill, click the dollar amount in the Total column. This will display the entries for the Pre-Bill, which can then be edited. To update a section or item under Time Entries or Expense Entries, click on the desired box. The information will open and is editable. When complete, click **Save** in the upper-right-hand corner.

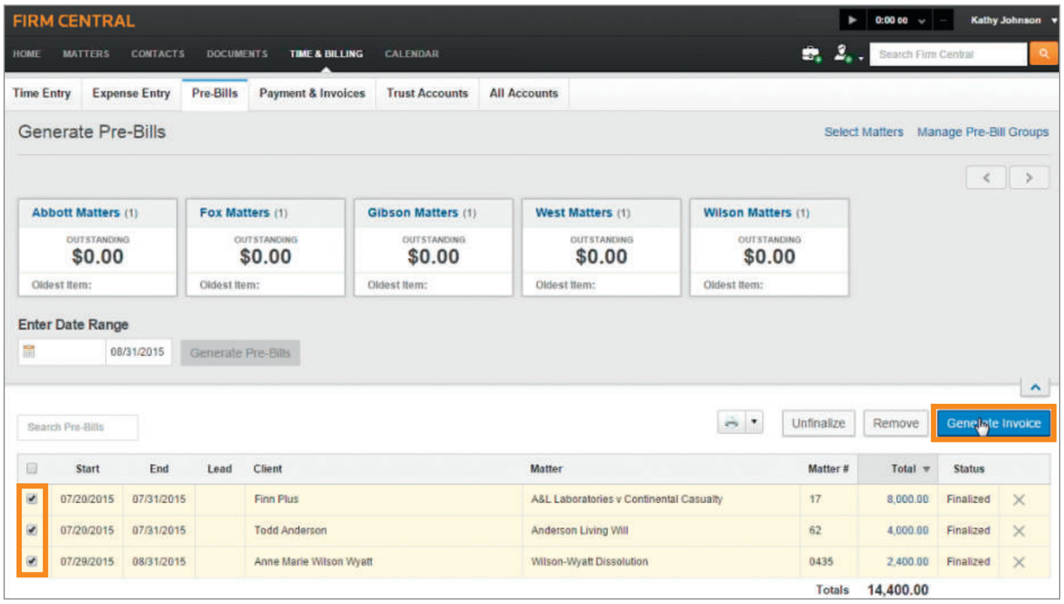



In addition, the Invoice Total can be reviewed and edited. Here, customer-specific adjustments can be made, including adding discounts and finance charges. To edit, click **Add** and enter your choice of a dollar amount discount or percentage-based discount. When ready, click **Save**. The total will now be updated according to the recorded discount or addition of finance charges, and will show any Outstanding Balance from previous invoicing.



## Finalizing and Generating Your Invoices

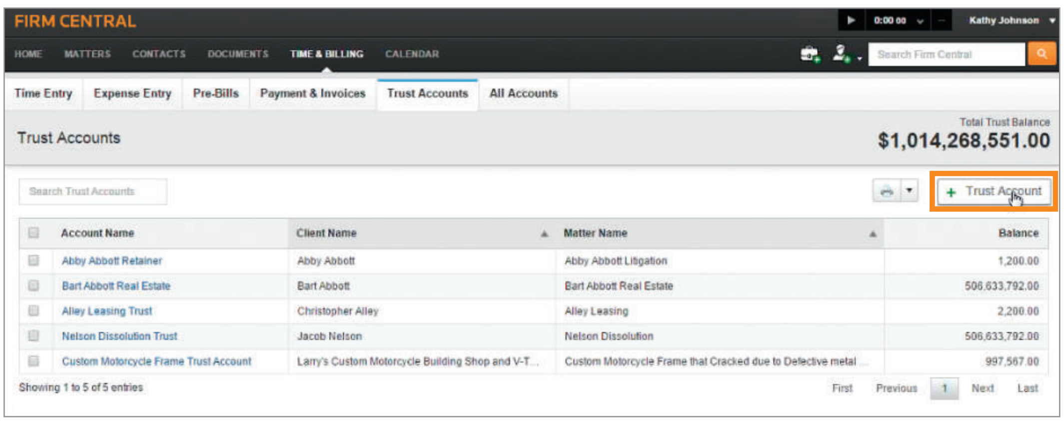
Once the Pre-Bill is reviewed and ready for the client, it is time to finalize it and create your invoices. From the Pre-Bill tab in Time & Billing, select the desired entry or entries from the list by checking the box in the left column. When in Pre-Bill status, you can save a copy for submission later by clicking **Finalize**. Otherwise, when ready, select the desired entry or entries from the list and click **Generate Invoice**. The invoice or invoices are now created and can be tracked under the Payment & Invoices tab.



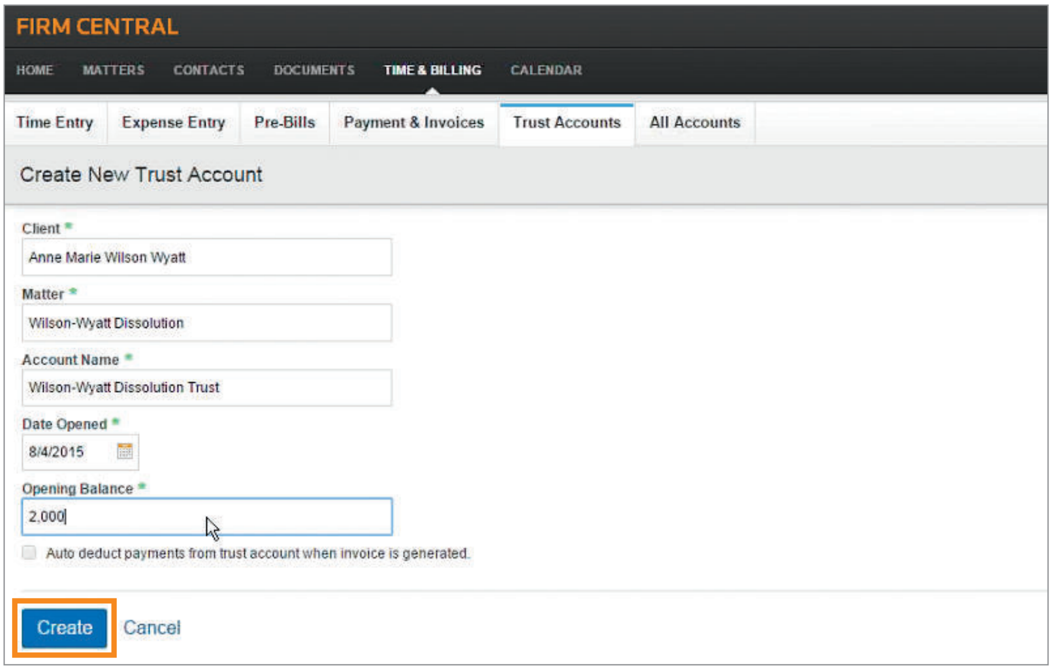

## Creating and Managing Trust Accounts

Time & Billing allows for the creation and tracking of client Trust Accounts. To access this feature, click the **Trust Accounts** tab.

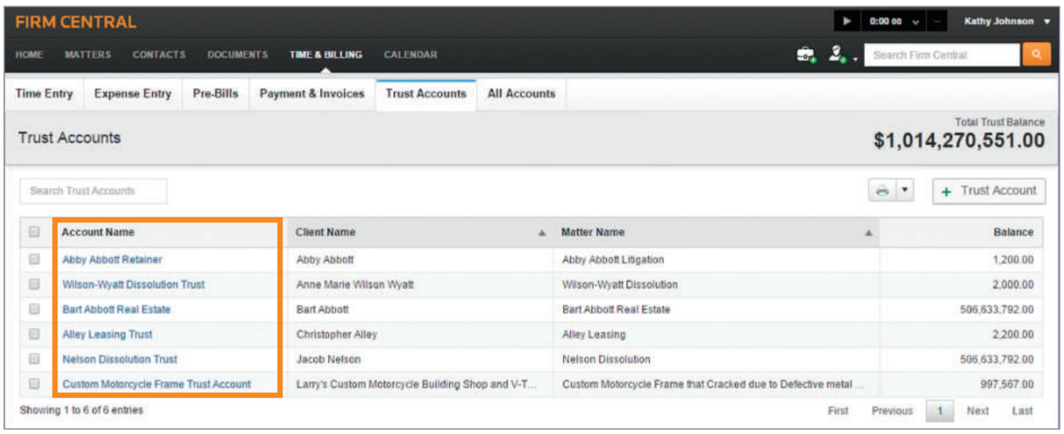
To create a Trust Account, click **+ Trust Account** near the upper-right-hand corner.



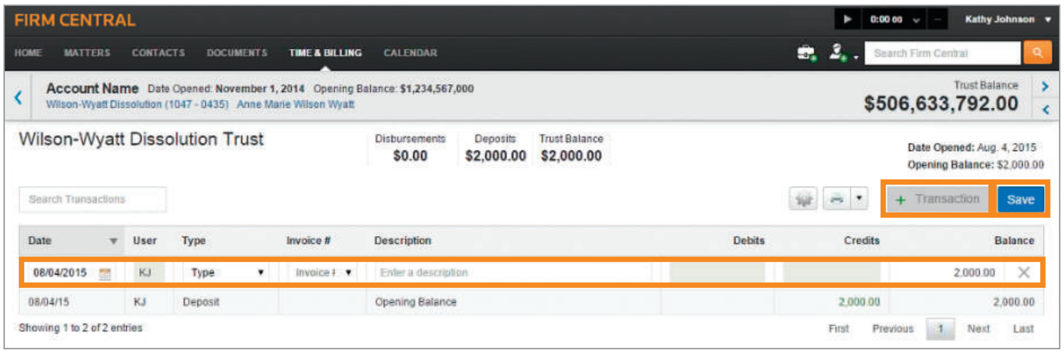
A new window will appear in the tab, and pertinent information can be entered for the new Trust Account. Once complete, click **Create** near the bottom of the form.




Once a Trust Account is created, any account activity can be recorded to that account. To manage a particular account, select the desired account from the list on the Trust Accounts tab.

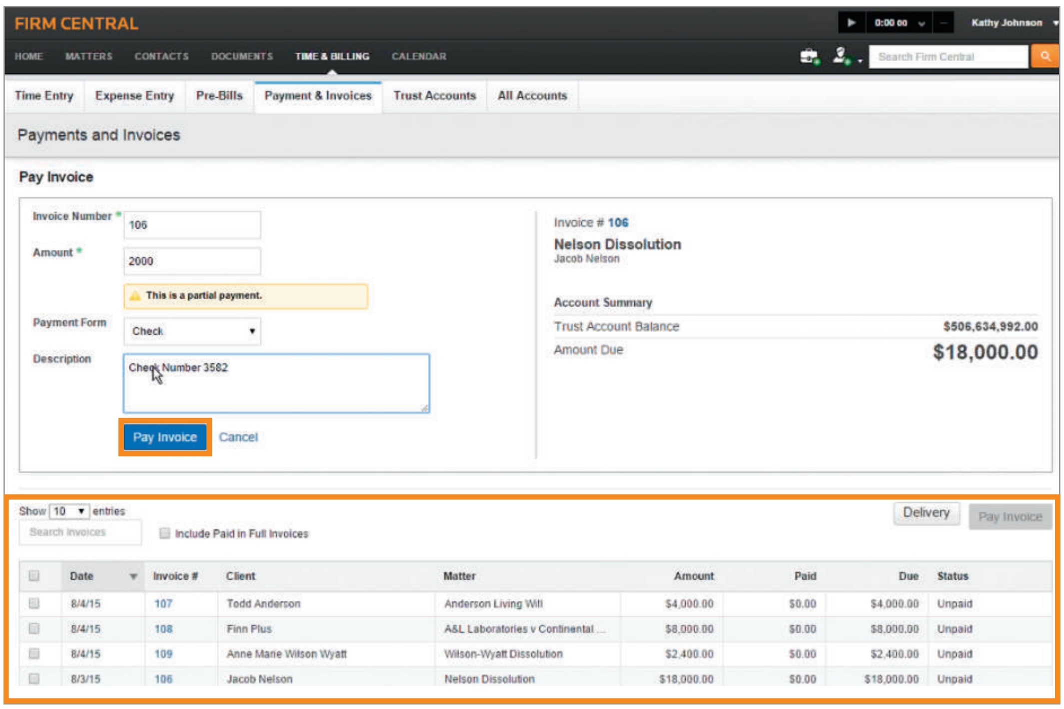


To record a deposit or disbursement into the Trust Account, click **+ Transaction** near the upper-right-hand corner. A new row will appear. Enter the requested info to create the new entry. When complete, click **Save** near the upper-right-hand corner. The new entry will now be applied to the Trust Account, and the balance will automatically update.



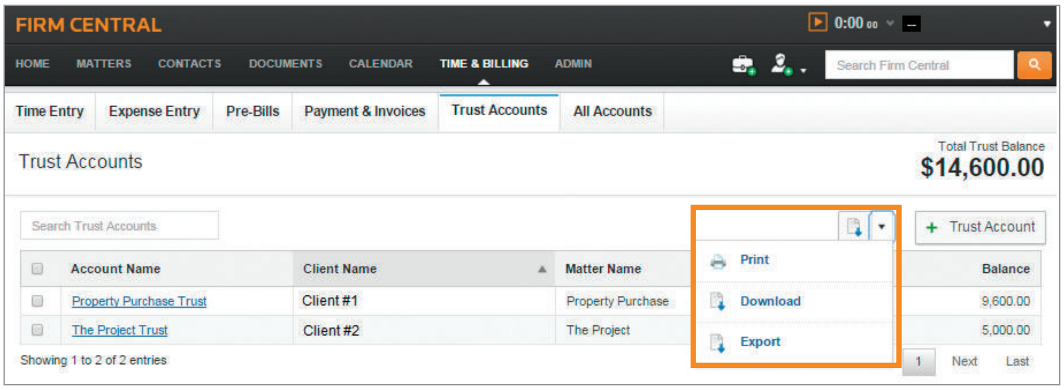

## Receiving and Entering Payments

Time & Billing allows for the tracking of invoices and payments received under the Payments & Invoices tab. When a payment is received for an invoice, it can be entered into the system in the Pay Invoice box. Enter the appropriate information, including the invoice number to which the payment applies, the amount, and the form of payment and description. When complete, click **Pay Invoice** to save. The payment will now be applied to the invoice. All invoices can be searched using the list below the Pay Invoice box.



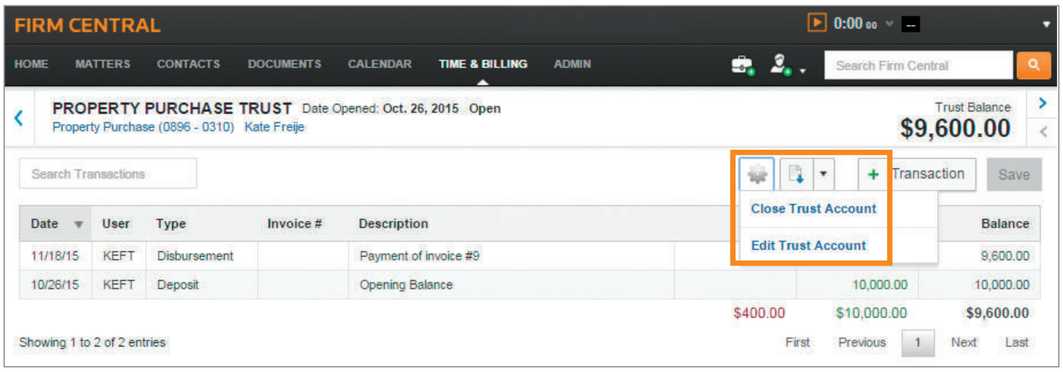
## Downloading Accounts Activity

To print, download or export information from the Trust Accounts or All Accounts section, select the drop-down menu just left of the + Trust Account button. If no accounts are checked, all accounts will be selected and printed, downloaded or exported by default. To perform the action on only desired accounts, click the check boxes next to the applicable account names along the left-hand side.




## Editing or Closing a Trust Account

To close a Trust Account, navigate into the desired Trust Account summary page. Click the Gear icon near the upper-right-hand corner, which will display drop-down options to edit or close the Trust Account.



Notes

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