



C&T Billing Overview for Legal Staff

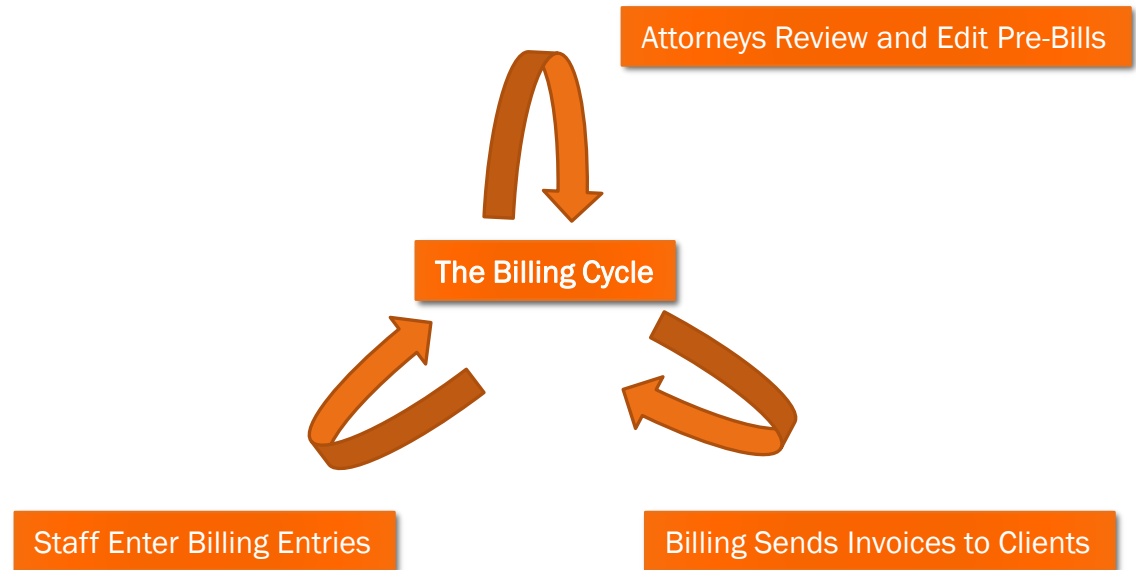
24 AUGUST 2022

Overview of Topics

- C&T Billing Cycle
- Bill Creation and Overview
- Accounts Receivable (AR, aka Client Balance)
- Trust Funds
- Matter Billing Settings: Common Mistakes
- Vendor and Associate Invoices
- Matter Archive Checklist
- One Page Cheat Sheet

C&T Billing Cycle

- Bill Once a Month
- Staff billing entries due in TM by EoD the 5th of the month
- Attorney edits to pre-bills due by EoD the 15th of each month
- If these dates fall on a weekend or holiday, date is pushed back to the next business day



Bill Creation

- Time Matters handles all billing at the Matter level
- For most clients, their non-G1 matters will consolidate to their G1 matter
 - Single bill is generated from the G1 including billing for all matters consolidated to it
 - G1s should not be consolidated to other matters
 - Only G1s should have the “Email Copy of Bill” box checked in the Billing Settings
- Each Bill includes unbilled time entries from the prior month or earlier
 - IE: A bill from July includes time from June or earlier
- Copies of the bill are stored in the AR tab of the G1
 - To view, right click and select “Reprint Invoice”

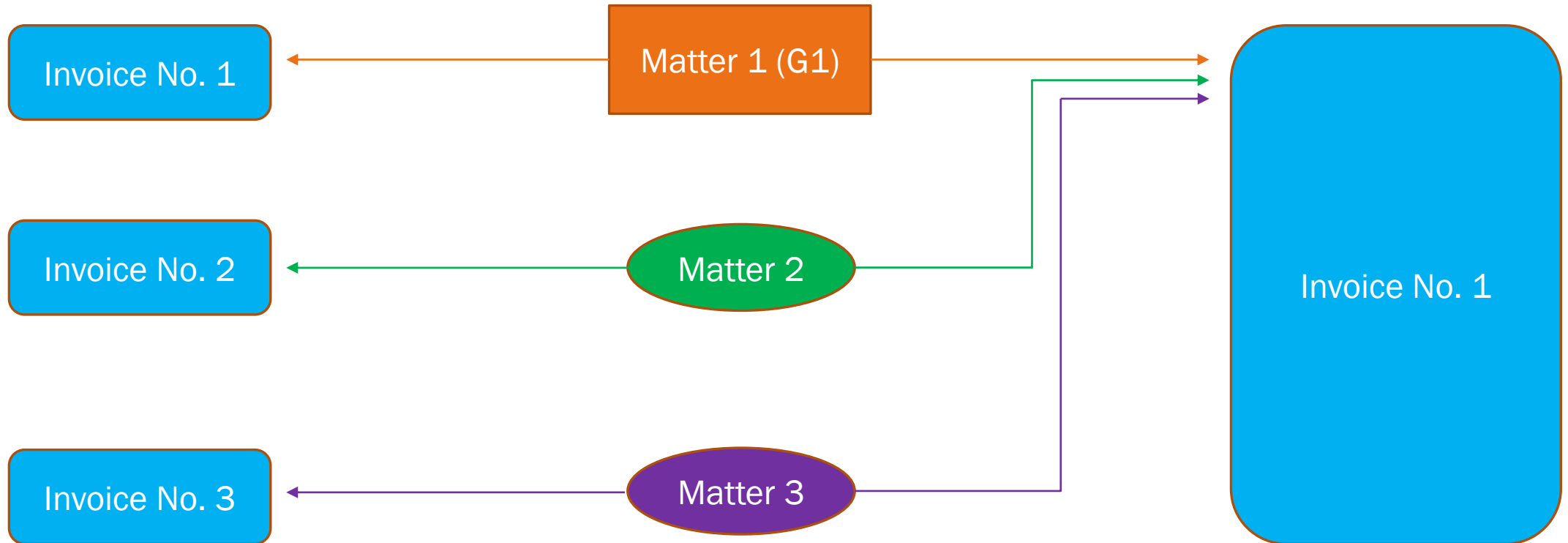
All	Invoices	Payments	AR Transactions	Funds	
Date \	Type	Number	Amount	Balance	Billed
7/18/2022	Invoice	701669	148.50	148.50	7/18/2022
7/18/2022	Invoice	701668	7,415.23	7,415.23	7/18/2022
7/18/2022	Invoice	701667	139.00	139.00	7/18/2022
7/18/2022	Invoice	701666	0.00	0.00	7/18/2022
7/18/2022	Invoice	701665	0.00	0.00	7/18/2022
7/18/2022	Invoice	701664	0.00	0.00	7/18/2022
7/18/2022	Invoice	701663	0.00	0.00	7/18/2022
7/18/2022	Invoice	701662	399.50	399.50	7/18/2022
6/17/2022	Invoice		Add	00	198.00 6/17/2022
6/17/2022	Invoice		Change	00	0.00 6/17/2022
6/17/2022	Invoice		Delete	00	0.00 6/17/2022
6/17/2022	Invoice			00	0.00 6/17/2022
6/17/2022	Invoice		Reprint Bill	00	693.00 6/17/2022
6/17/2022	Invoice		Email Bill	00	0.00 6/17/2022
5/12/2022	Invoice		Tag Record	00	0.00 5/12/2022
5/12/2022	Invoice		Properties	00	0.00 5/12/2022

Invoice Consolidation

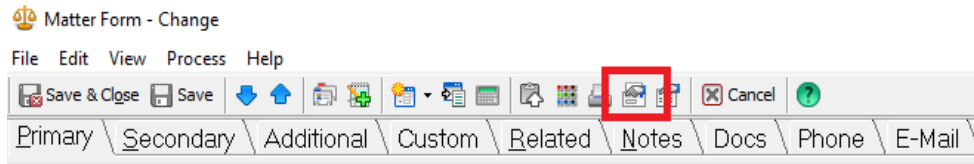
What Time Matters Sees

Consolidated Matters

What Client Sees

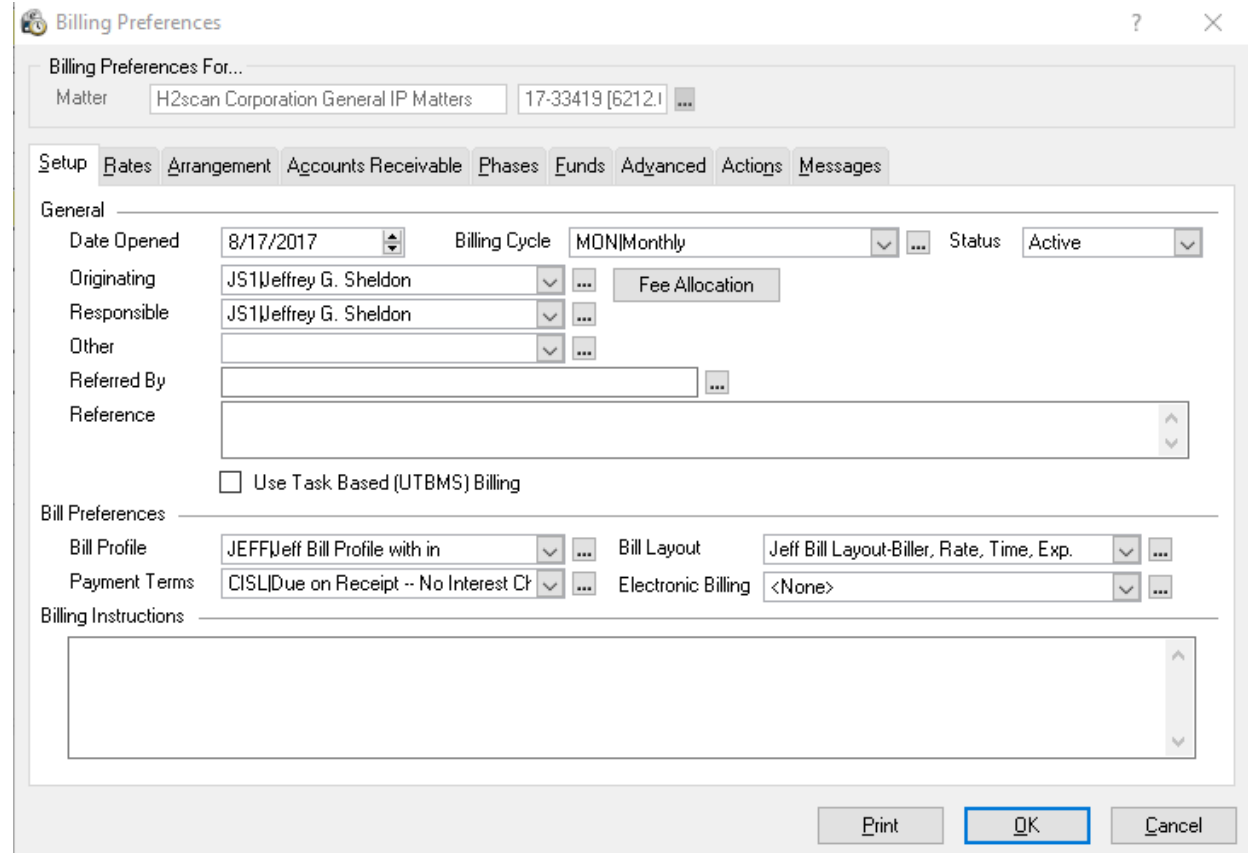


Matter Billing Preferences: Common Mistakes



- Setup Tab

- Originating and Responsible fields should match staff UNLESS attorney does not review bills, in which case use DAN
 - David and Andrew do not review bills
 - Fee Allocation Numbers do not matter (pops up when changing Originating/Responsible staff)
- All matters for a client should have the same responsible staff



Matter Billing Preferences: Common Mistakes

- Accounts Receivable Tab
 - Email address field determines where invoices sent NOT the client or matter email fields
 - Must be updated when emails change
 - Only the G1 should have “Email Copy of Bill” checked
 - Note: Some existing G1s are set to not email bills; please check with Billing before changing

The screenshot shows the 'Billing Preferences' dialog box with the 'Accounts Receivable' tab selected. The 'Billing Preferences For...' section shows 'Matter' as 'H2scan Corporation General IP Matters' and '17-33419 [6212.1]'. The 'Early Payment Discount' section has 'Discount %' at 0.00, 'Days Due' at 0, and 'Applies To' set to 'Fees, Expenses and Interest'. The 'Payments' section has 'Allocation Order' set to 'Expenses, Fees, Interest', 'Order' set to 'Oldest', 'Pay First' set to 'Invoice', and 'Create Second Copy' unchecked. The 'Bills' section has 'Bill To' and 'Ship To' both set to 'Contact Area 2', 'Email Copy of Bill' checked, 'Email Address' set to 'accounting@h2scan.com; MFerguson@h2scan.com', and 'Subject' set to 'Invoice from {FIRM}'. The 'General Ledger' section has 'GL Account' set to '=G752795A56E9C71'. The 'Invoice' section has 'Use Global Invoice Number' selected, 'Use the following Invoice Number' set to 0, and 'Invoice Number Format' set to '(Use Program Level)'. The 'Print', 'OK', and 'Cancel' buttons are at the bottom right.

Billing Preferences

Billing Preferences For...
Matter: H2scan Corporation General IP Matters 17-33419 [6212.1]

Setup Rates Arrangement **Accounts Receivable** Phases Funds Advanced Actions Messages

Early Payment Discount
Discount %: 0.00 Days Due: 0 Applies To: Fees, Expenses and Interest

Payments
Allocation Order: Expenses, Fees, Interest Order: Oldest Pay First: Invoice Create Second Copy: ☐

Bills
Bill To: Contact Area 2 Ship To: Contact Area 2 Email Copy of Bill: ☒ Email Address: accounting@h2scan.com; MFerguson@h2scan.com Subject: Invoice from {FIRM}


General Ledger
GL Account: =G752795A56E9C71

Invoice
☒ Use Global Invoice Number ☐ Use the following Invoice Number: 0 Invoice Number Format: (Use Program Level)

Print OK Cancel

Matter Billing Preferences: Common Mistakes

- Advanced Tab
 - Matters other than G1s should be set to consolidate


Billing Preferences
?
✕

Billing Preferences For...

Matter

...

Setup
 Rates
 Arrangement
 Accounts Receivable
 Phases
 Funds
 Advanced
 Actions
 Messages

Consolidation

☐ Consolidate billing with another Matter

Matter Ref

...

Budget

Amount

 Hours

Split Charges

Split with Matter	Fees %	Expense %
<div> <div>Add</div> <div>Change</div> <div>Delete</div> </div>		
Total		0.00
		0.00

Print

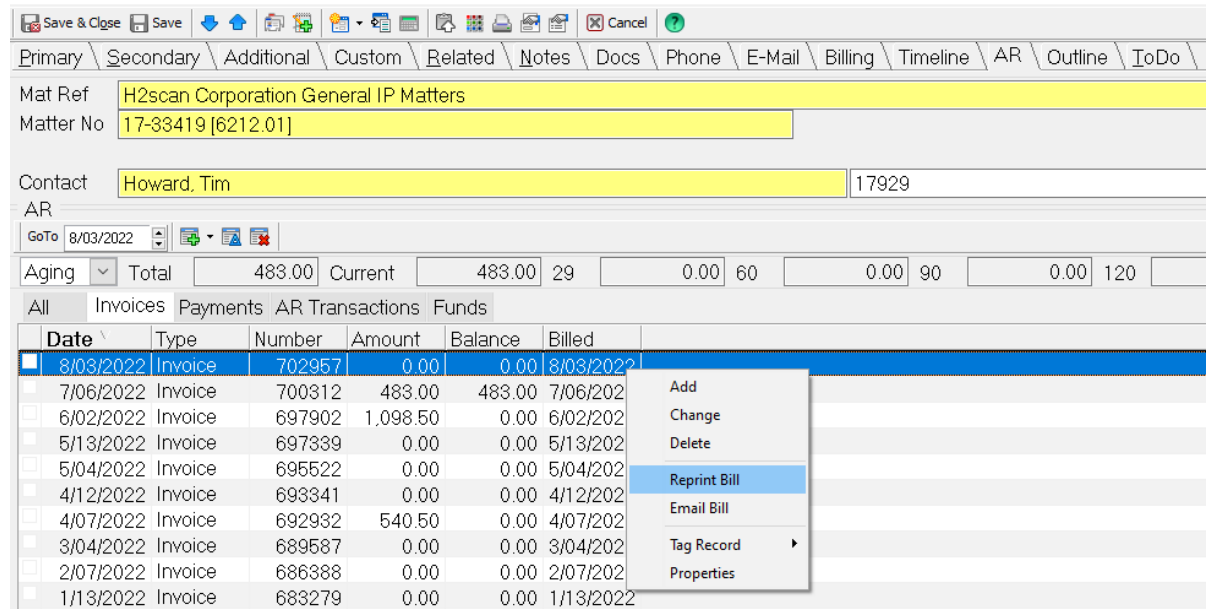
OK

Cancel

Viewing Past Invoices

From the Client G1

1. Open the AR tab on the G1 Matter
2. Click the “Invoice Filter
3. Right-Click the Invoice of the desired date and select “Reprint Bill”

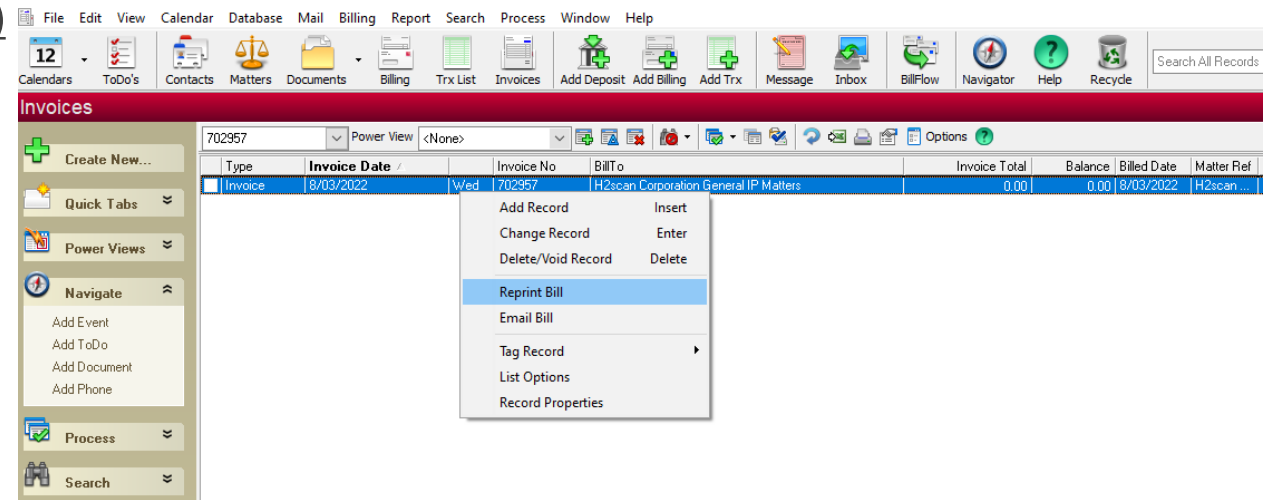


Mat Ref	H2scan Corporation General IP Matters				
Matter No	17-33419 [6212.01]				
Contact	Howard, Tim				17929
AR	GoTo 8/03/2022				
Aging	Total	483.00	Current	483.00	29
				0.00	60
				0.00	90
				0.00	120
All	Invoices	Payments	AR Transactions	Funds	
Date	Type	Number	Amount	Balance	Billed
8/03/2022	Invoice	702957	0.00	0.00	8/03/2022
7/06/2022	Invoice	700312	483.00	483.00	7/06/2022
6/02/2022	Invoice	697902	1,098.50	0.00	6/02/2022
5/13/2022	Invoice	697339	0.00	0.00	5/13/2022
5/04/2022	Invoice	695522	0.00	0.00	5/04/2022
4/12/2022	Invoice	693341	0.00	0.00	4/12/2022
4/07/2022	Invoice	692932	540.50	0.00	4/07/2022
3/04/2022	Invoice	689587	0.00	0.00	3/04/2022
2/07/2022	Invoice	686388	0.00	0.00	2/07/2022
1/13/2022	Invoice	683279	0.00	0.00	1/13/2022

Viewing Past Invoices

From the Invoices List (Requires Invoice Number)

1. In the billing dropdown menu along the top of Time Matters, select “Invoice List” (shortcut: Alt+F12)
2. Type the Invoice Number into the search bar and search for the invoice number
3. Right Click the invoice and select “Reprint Bill”



Accounts Receivable (AR)

- AR tab has everything about client balance:
 - Invoices
 - Payments
 - Trust Applications
 - Credits
- Information about the client/matter balance is summarized by how long the balance has gone unpaid
 - Invoices aged 60 days or older are overdue
 - TM does not always correctly assess the date in generating these aged balance numbers

Primary \ Secondary \ Additional \ ToDo \ Matter \ Related \ Notes \ Docs \ E-Mail \ Billing \ AR \ Timeline \ Outline \ Mail \ Phone \

Full Name David T. Hengami ConNo

Last Hengami First David T.

Sal Mail

Mat Ref

AR

GoTo 8/02/2022

Aging

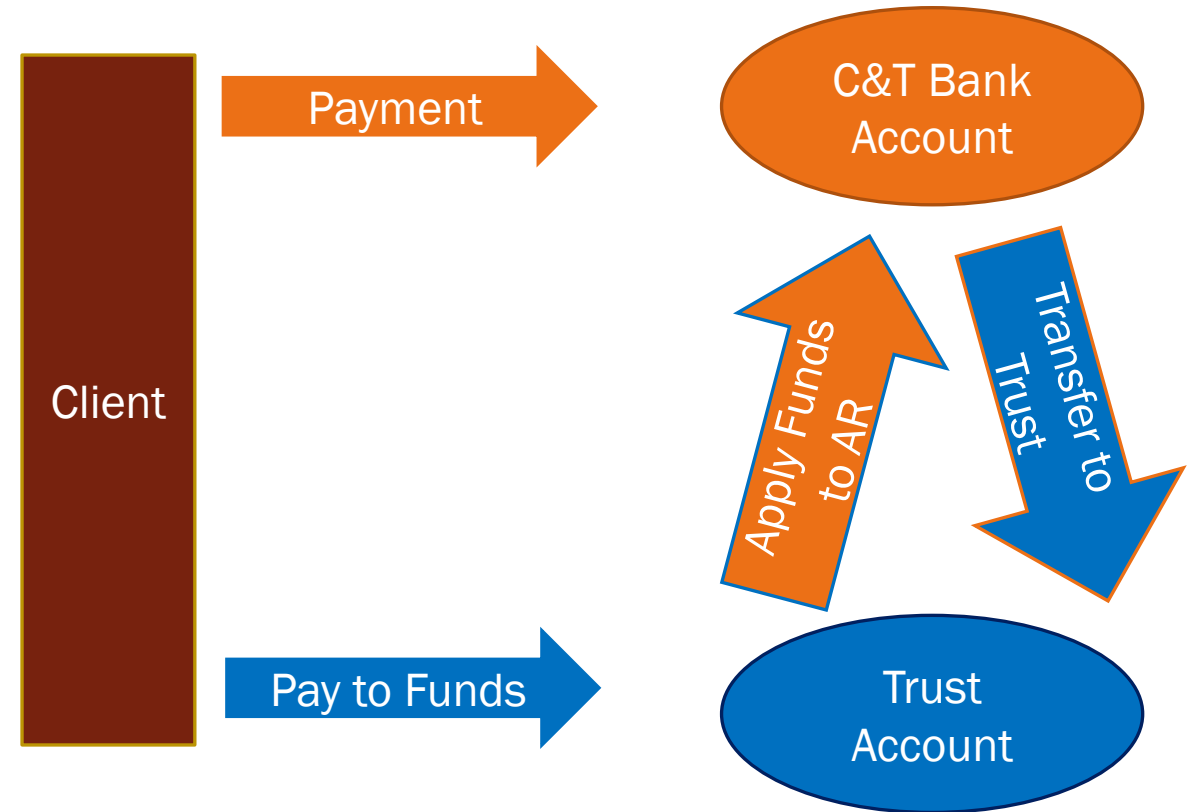
Total 13,096.35 Current 8,102.23 29 891.00 60 2,469.87 90 1,633.25 120 0.00

All Invoices Payments AR Transactions Funds

Date	Type	Number	Amount	Balance	Billed
7/18/2022	Invoice	701669	148.50	148.50	7/18/2022
7/18/2022	Invoice	701668	7,415.23	7,415.23	7/18/2022
7/18/2022	Invoice	701667	139.00	139.00	7/18/2022
7/18/2022	Invoice	701666	0.00	0.00	7/18/2022
7/18/2022	Invoice	701665	0.00	0.00	7/18/2022
7/18/2022	Invoice	701664	0.00	0.00	7/18/2022
7/18/2022	Invoice	701663	0.00	0.00	7/18/2022
7/18/2022	Invoice	701662	399.50	399.50	7/18/2022
7/11/2022	Payment	Credit Card	-495.25	0.00	7/18/2022
7/11/2022	Payment	Credit Card	-1,582.00	0.00	7/18/2022
7/11/2022	Payment	Credit Card	-1,122.75	0.00	7/18/2022
6/17/2022	Invoice	699627	198.00	198.00	6/17/2022
6/17/2022	Invoice	699626	0.00	0.00	6/17/2022
6/17/2022	Invoice	699625	0.00	0.00	6/17/2022
6/17/2022	Invoice	699624	0.00	0.00	6/17/2022
6/17/2022	Invoice	699623	693.00	693.00	6/17/2022

Trust Funds

- Funds required in advance before beginning work
 - Not necessarily an estimate of cost
- Required by law to be kept in a separate bank account on client's behalf until used to fund legal work
- Trust Funds are automatically applied towards new balances billed to their matter
- Trust Funds only exist at the matter level; do not automatically apply to client's other matters



View a Matter's Trust Funds

From the Matter Page

1. Open the AR Tab on the Matter Page
2. Click the drop-down arrow next to the “Aging” Box and select “Trust”; the new number displayed is the amount of trust funds on the matter

Primary \ Secondary \ Additional \ Custom \ Related \ Notes \ Docs \ Phone \ E-Mail \ Billing \ Timeline \ AR \ Outline \ ToDo

Mat Ref Heat-not-Burn Device II (National Phase) (EU)

Matter No 22-45707 Country EU

Plaintiff

Contact Chong, Alex 20045

AR

GoTo 8/03/2022

Funds TRUS 10,000.00

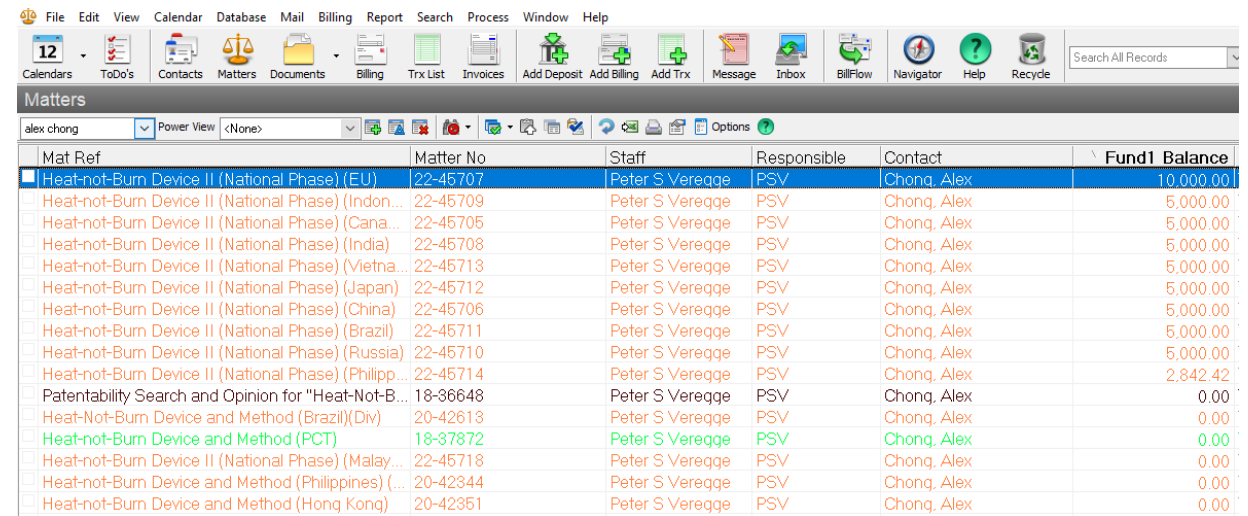
All Aging Choices Payments AR Transactions Funds

Date	Type	Number	Amount	Balance	Billed
8/03/2022	Fund to ...		10,000.00	0.00	

View a Matter's Trust Funds

From the Matter List

1. Edit your Matter List to display the “Fund1 Balance” Field
2. Type the client's name into the search bar to bring up their matters
3. Click on the top of the “Fund1Balance” column to sort from highest to lowest balance; this will bring all the matters with fund balances to the top



The screenshot shows a software interface with a menu bar (File, Edit, View, Calendar, Database, Mail, Billing, Report, Search, Process, Window, Help) and a toolbar with various icons. Below the toolbar is a 'Matters' section with a search bar containing 'alex chong' and a 'Power View' dropdown. The main area displays a table of matters, sorted by 'Fund1 Balance' in descending order. The table has columns for Mat Ref, Matter No, Staff, Responsible, Contact, and Fund1 Balance.

Mat Ref	Matter No	Staff	Responsible	Contact	Fund1 Balance
Heat-not-Burn Device II (National Phase) (EU)	22-45707	Peter S Veregge	PSV	Chong, Alex	10,000.00
Heat-not-Burn Device II (National Phase) (Indon...	22-45709	Peter S Veregge	PSV	Chong, Alex	5,000.00
Heat-not-Burn Device II (National Phase) (Cana...	22-45705	Peter S Veregge	PSV	Chong, Alex	5,000.00
Heat-not-Burn Device II (National Phase) (India)	22-45708	Peter S Veregge	PSV	Chong, Alex	5,000.00
Heat-not-Burn Device II (National Phase) (Vietna...	22-45713	Peter S Veregge	PSV	Chong, Alex	5,000.00
Heat-not-Burn Device II (National Phase) (Japan)	22-45712	Peter S Veregge	PSV	Chong, Alex	5,000.00
Heat-not-Burn Device II (National Phase) (China)	22-45706	Peter S Veregge	PSV	Chong, Alex	5,000.00
Heat-not-Burn Device II (National Phase) (Brazil)	22-45711	Peter S Veregge	PSV	Chong, Alex	5,000.00
Heat-not-Burn Device II (National Phase) (Russia)	22-45710	Peter S Veregge	PSV	Chong, Alex	5,000.00
Heat-not-Burn Device II (National Phase) (Philipp...	22-45714	Peter S Veregge	PSV	Chong, Alex	2,842.42
Patentability Search and Opinion for "Heat-Not-B...	18-36648	Peter S Veregge	PSV	Chong, Alex	0.00
Heat-Not-Burn Device and Method (Brazil)(Div)	20-42613	Peter S Veregge	PSV	Chong, Alex	0.00
Heat-not-Burn Device and Method (PCT)	18-37872	Peter S Veregge	PSV	Chong, Alex	0.00
Heat-not-Burn Device II (National Phase) (Malay...	22-45718	Peter S Veregge	PSV	Chong, Alex	0.00
Heat-not-Burn Device and Method (Philippines) (...)	20-42344	Peter S Veregge	PSV	Chong, Alex	0.00
Heat-not-Burn Device and Method (Hong Kong)	20-42351	Peter S Veregge	PSV	Chong, Alex	0.00

Vendor and Associate Invoices

- Forward to invoice@cislo.com for payment
- Billing will log expenses to clients
 - Exception: Legal staff requesting checks for state trademark applications
- Wondering if an invoice has been paid?
Check the InvoicePaid box
 - Updated for invoices paid from July 2021 onwards

The screenshot shows a 'Document Form - Change' window with a menu bar (File, Edit, View, Process, Help) and a toolbar. The form is divided into several sections:

- Primary** tab is selected. It contains fields for Date (7/28/2022), Time (8:22am-8:23am), Code (INVOInvoices), Desc (Federal Express Invoice No. 7-834-14215), Staff (DANI Daniel M Cislo), Regarding (C & T Bills, Invoices Not Chargeable to Client), File Name (&13-27459\Federal Express Invoice No. 7-834-14215.PDF), and Reminders (Follow, Sent, Notify, Hide, Trigger, Review, Billable, Private, Status).
- 2** section: ☐ FU Complete?
- 3** section: InvoicePaid ☒ (checked), Docket? ☐ (unchecked), FU Date, and Comments.
- 4** section: Memo, Generate, Existing, New File, Clipboard, Merge, Scan, HotDocs.
- File Information** section: Date (7/29/2022), Time (8:23AM), Size (567.972), GoTo, and New Version.

Matter Checklist

New Matter Billing Setup Checklist

- ☐ Responsible attorney matches the matter staff (unless Sandelands or Naglestad, in which case use DAN)
- ☐ “Email Copy of Bill” is checked if the matter is a G1; otherwise not checked
- ☐ If a G2, consolidated to the client’s G1

Matter Archiving Checklist

If any of the following are true, do not archive the matter and reach out to Billing:

- ☐ Matter has balance
- ☐ Matter has unused trust funds
- ☐ Matter has unbilled fees or expenses

C&T Billing Cheat Sheet for Legal Staff: AR Pages

1. Find Invoice from G1 Matter

1. Open the AR tab on the G1 Matter
2. Click the "Invoice" Filter
3. Right Click the recently dated invoice and select "Reprint Bill"

2. View Client's Current Outstanding

1. Open the AR tab on the Client page
2. The total balance is in the box to the right of "Total"; the boxes further right break that balance down by age

3. View Trust Funds on a Matter

1. Open AR Tab on the Matter page
2. Click the drop-down arrow next to the "Aging" Box and Select "Trust"; the number displayed is the amount of trust funds on the matter

4. Check If Client Has Paid Towards Balance

1. Open the AR Tab on the Client page
2. Click the "Payments" Tab; the list will now display all payments the client has made

Example Client Page

Primary \ Secondary \ Additional \ ToDo \ Matter \ Related \ Notes \ Docs \ E-Mail \ Billing \ AR \ Timeline \ Outline \ Mail \ Phone \

Full Name: David T. Hengami ConNo: []

Last: Hengami First: David

Sal: [] Main: []

Mat Ref: []

AR: []

GoTo: 8/02/2022 [] [] [] []

2

Aging: Total 13,096.35 Current 8,102.23 29 891.00 60 2,469.87 90 1,633.25 120 0.00

All Invoices Payments AR Transactions Funds

Date	Type	Number	Amount	Balance	Billed
7/18/2022	Invoice	701669	148.50	148.50	7/18/2022
7/18/2022	Invoice	701668	7,415.23	7,415.23	7/18/2022
7/18/2022	Invoice	701667	139.00	139.00	7/18/2022
7/18/2022	Invoice	701666	0.00	0.00	7/18/2022
7/18/2022	Invoice	701665	0.00	0.00	7/18/2022
7/18/2022	Invoice	701664	0.00	0.00	7/18/2022
7/18/2022	Invoice	701663	0.00	0.00	7/18/2022
7/18/2022	Invoice	701662	0.00	0.00	7/18/2022
7/18/2022	Invoice	701661	0.00	0.00	7/18/2022
7/18/2022	Invoice	701660	0.00	0.00	7/18/2022
7/18/2022	Invoice	701659	0.00	0.00	7/18/2022
7/18/2022	Invoice	701658	0.00	0.00	7/18/2022
7/18/2022	Invoice	701657	0.00	0.00	7/18/2022
7/18/2022	Invoice	701656	0.00	0.00	7/18/2022
7/18/2022	Invoice	701655	0.00	0.00	7/18/2022
7/18/2022	Invoice	701654	0.00	0.00	7/18/2022
7/18/2022	Invoice	701653	0.00	0.00	7/18/2022
7/18/2022	Invoice	701652	0.00	0.00	7/18/2022
7/18/2022	Invoice	701651	0.00	0.00	7/18/2022
7/18/2022	Invoice	701650	0.00	0.00	7/18/2022
7/18/2022	Invoice	701649	0.00	0.00	7/18/2022
7/18/2022	Invoice	701648	0.00	0.00	7/18/2022
7/18/2022	Invoice	701647	0.00	0.00	7/18/2022
7/18/2022	Invoice	701646	0.00	0.00	7/18/2022
7/18/2022	Invoice	701645	0.00	0.00	7/18/2022
7/18/2022	Invoice	701644	0.00	0.00	7/18/2022
7/18/2022	Invoice	701643	0.00	0.00	7/18/2022
7/18/2022	Invoice	701642	0.00	0.00	7/18/2022
7/18/2022	Invoice	701641	0.00	0.00	7/18/2022
7/18/2022	Invoice	701640	0.00	0.00	7/18/2022
7/18/2022	Invoice	701639	0.00	0.00	7/18/2022
7/18/2022	Invoice	701638	0.00	0.00	7/18/2022
7/18/2022	Invoice	701637	0.00	0.00	7/18/2022
7/18/2022	Invoice	701636	0.00	0.00	7/18/2022
7/18/2022	Invoice	701635	0.00	0.00	7/18/2022
7/18/2022	Invoice	701634	0.00	0.00	7/18/2022
7/18/2022	Invoice	701633	0.00	0.00	7/18/2022
7/18/2022	Invoice	701632	0.00	0.00	7/18/2022
7/18/2022	Invoice	701631	0.00	0.00	7/18/2022
7/18/2022	Invoice	701630	0.00	0.00	7/18/2022
7/18/2022	Invoice	701629	0.00	0.00	7/18/2022
7/18/2022	Invoice	701628	0.00	0.00	7/18/2022
7/18/2022	Invoice	701627	0.00	0.00	7/18/2022
7/18/2022	Invoice	701626	0.00	0.00	7/18/2022
7/18/2022	Invoice	701625	0.00	0.00	7/18/2022
7/18/2022	Invoice	701624	0.00	0.00	7/18/2022
7/18/2022	Invoice	701623	0.00	0.00	7/18/2022
7/18/2022	Invoice	701622	0.00	0.00	7/18/2022
7/18/2022	Invoice	701621	0.00	0.00	7/18/2022
7/18/2022	Invoice	701620	0.00	0.00	7/18/2022
7/18/2022	Invoice	701619	0.00	0.00	7/18/2022
7/18/2022	Invoice	701618	0.00	0.00	7/18/2022
7/18/2022	Invoice	701617	0.00	0.00	7/18/2022
7/18/2022	Invoice	701616	0.00	0.00	7/18/2022
7/18/2022	Invoice	701615	0.00	0.00	7/18/2022
7/18/2022	Invoice	701614	0.00	0.00	7/18/2022
7/18/2022	Invoice	701613	0.00	0.00	7/18/2022
7/18/2022	Invoice	701612	0.00	0.00	7/18/2022
7/18/2022	Invoice	701611	0.00	0.00	7/18/2022
7/18/2022	Invoice	701610	0.00	0.00	7/18/2022
7/18/2022	Invoice	701609	0.00	0.00	7/18/2022
7/18/2022	Invoice	701608	0.00	0.00	7/18/2022
7/18/2022	Invoice	701607	0.00	0.00	7/18/2022
7/18/2022	Invoice	701606	0.00	0.00	7/18/2022
7/18/2022	Invoice	701605	0.00	0.00	7/18/2022
7/18/2022	Invoice	701604	0.00	0.00	7/18/2022
7/18/2022	Invoice	701603	0.00	0.00	7/18/2022
7/18/2022	Invoice	701602	0.00	0.00	7/18/2022
7/18/2022	Invoice	701601	0.00	0.00	7/18/2022
7/18/2022	Invoice	701600	0.00	0.00	7/18/2022
7/18/2022	Invoice	701599	0.00	0.00	7/18/2022
7/18/2022	Invoice	701598	0.00	0.00	7/18/2022
7/18/2022	Invoice	701597	0.00	0.00	7/18/2022
7/18/2022	Invoice	701596	0.00	0.00	7/18/2022
7/18/2022	Invoice	701595	0.00	0.00	7/18/2022
7/18/2022	Invoice	701594	0.00	0.00	7/18/2022
7/18/2022	Invoice	701593	0.00	0.00	7/18/2022
7/18/2022	Invoice	701592	0.00	0.00	7/18/2022
7/18/2022	Invoice	701591	0.00	0.00	7/18/2022
7/18/2022	Invoice	701590	0.00	0.00	7/18/2022
7/18/2022	Invoice	701589	0.00	0.00	7/18/2022
7/18/2022	Invoice	701588	0.00	0.00	7/18/2022
7/18/2022	Invoice	701587	0.00	0.00	7/18/2022
7/18/2022	Invoice	701586	0.00	0.00	7/18/2022
7/18/2022	Invoice	701585	0.00	0.00	7/18/2022
7/18/2022	Invoice	701584	0.00	0.00	7/18/2022
7/18/2022	Invoice	701583	0.00	0.00	7/18/2022
7/18/2022	Invoice	701582	0.00	0.00	7/18/2022
7/18/2022	Invoice	701581	0.00	0.00	7/18/2022
7/18/2022	Invoice	701580	0.00	0.00	7/18/2022
7/18/2022	Invoice	701579	0.00	0.00	7/18/2022
7/18/2022	Invoice	701578	0.00	0.00	7/18/2022
7/18/2022	Invoice	701577	0.00	0.00	7/18/2022
7/18/2022	Invoice	701576	0.00	0.00	7/18/2022
7/18/2022	Invoice	701575	0.00	0.00	7/18/2022
7/18/2022	Invoice	701574	0.00	0.00	7/18/2022
7/18/2022	Invoice	701573	0.00	0.00	7/18/2022
7/18/2022	Invoice	701572	0.00	0.00	7/18/2022
7/18/2022	Invoice	701571	0.00	0.00	7/18/2022
7/18/2022	Invoice	701570	0.00	0.00	7/18/2022
7/18/2022	Invoice	701569	0.00	0.00	7/18/2022
7/18/2022	Invoice	701568	0.00	0.00	7/18/2022
7/18/2022	Invoice	701567	0.00	0.00	7/18/2022
7/18/2022	Invoice	701566	0.00	0.00	7/18/2022
7/18/2022	Invoice	701565	0.00	0.00	7/18/2022
7/18/2022	Invoice	701564	0.00	0.00	7/18/2022
7/18/2022	Invoice	701563	0.00	0.00	7/18/2022
7/18/2022	Invoice	701562	0.00	0.00	7/18/2022
7/18/2022	Invoice	701561	0.00	0.00	7/18/2022
7/18/2022	Invoice	701560	0.00	0.00	7/18/2022
7/18/2022	Invoice	701559	0.00	0.00	7/18/2022
7/18/2022	Invoice	701558	0.00	0.00	7/18/2022
7/18/2022	Invoice	701557	0.00	0.00	7/18/2022
7/18/2022	Invoice	701556	0.00	0.00	7/18/2022
7/18/2022	Invoice	701555	0.00	0.00	7/18/2022
7/18/2022	Invoice	701554	0.00	0.00	7/18/2022
7/18/2022	Invoice	701553	0.00	0.00	7/18/2022
7/18/2022	Invoice	701552	0.00	0.00	7/18/2022
7/18/2022	Invoice	701551	0.00	0.00	7/18/2022
7/18/2022	Invoice	701550	0.00	0.00	7/18/2022
7/18/2022	Invoice	701549	0.00	0.00	7/18/2022
7/18/2022	Invoice	701548	0.00	0.00	7/18/2022
7/18/2022	Invoice	701547	0.00	0.00	7/18/2022
7/18/2022	Invoice	701546	0.00	0.00	7/18/2022
7/18/2022	Invoice	701545	0.00	0.00	7/18/2022
7/18/2022	Invoice	701544	0.00	0.00	7/18/2022
7/18/2022	Invoice	701543	0.00	0.00	7/18/2022
7/18/2022	Invoice	701542	0.00	0.00	7/18/2022
7/18/2022	Invoice	701541	0.00	0.00	7/18/2022
7/18/2022	Invoice	701540	0.00	0.00	7/18/2022
7/18/2022	Invoice	701539	0.00	0.00	7/18/2022
7/18/2022	Invoice	701538	0.00	0.00	7/18/2022
7/18/2022	Invoice	701537	0.00	0.00	7/18/2022
7/18/2022	Invoice	701536	0.00	0.00	7/18/2022
7/18/2022	Invoice	701535	0.00	0.00	7/18/2022
7/18/2022	Invoice	701534	0.00	0.00	7/18/2022
7/18/2022	Invoice	701533	0.00	0.00	7/18/2022
7/18/2022	Invoice	701532	0.00	0.00	7/18/2022
7/18/2022	Invoice	701531	0.00	0.00	7/18/2022
7/18/2022	Invoice	701530	0.00	0.00	7/18/2022
7/18/2022	Invoice	701529	0.00	0.00	7/18/2022
7/18/2022	Invoice	701528	0.00	0.00	7/18/2022
7/18/2022	Invoice	701527	0.00	0.00	7/18/2022
7/18/2022	Invoice	701526	0.00	0.00	7/18/2022
7/18/2022	Invoice	701525	0.00	0.00	7/18/2022
7/18/2022	Invoice	701524	0.00	0.00	7/18/2022
7/18/2022	Invoice	701523	0.00	0.00	7/18/2022
7/18/2022	Invoice	701522	0.00	0.00	7/18/2022
7/18/2022	Invoice	701521	0.00	0.00	7/18/2022
7/18/2022	Invoice	701520	0.00	0.00	7/18/2022
7/18/2022	Invoice	701519	0.00	0.00	7/18/2022
7/18/2022	Invoice	701518	0.00	0.00	7/18/2022
7/18/2022	Invoice	701517	0.00	0.00	7/18/2022
7/18/2022	Invoice	701516	0.00	0.00	7/18/2022
7/18/2022	Invoice	701515	0.00	0.00	7/18/2022
7/18/2022	Invoice	701514	0.00	0.00	7/18/2022
7/18/2022	Invoice	701513	0.00	0.00	7/18/2022
7/18/2022	Invoice	701512	0.00	0.00	7/18/2022
7/18/2022	Invoice	701511	0.00	0.00	7/18/2022
7/18/2022	Invoice	701510	0.00	0.00	7/18/2022
7/18/2022	Invoice	701509	0.00	0.00	7/18/2022
7/18/2022	Invoice	701508	0.00	0.00	7/18/2022
7/18/2022	Invoice	701507	0.00	0.00	7/18/2022
7/18/2022	Invoice	701506	0.00	0.00	7/18/2022
7/18/2022	Invoice	701505	0.00	0.00	7/18/2022
7/18/2022	Invoice	701504	0.00	0.00	7/18/2022
7/18/2022	Invoice	701503	0.00	0.00	7/18/2022
7/18/2022	Invoice	701502	0.00	0.00	7/18/2022
7/18/2022	Invoice	701501	0.00	0.00	7/18/2022
7/18/2022	Invoice	701500	0.00	0.00	7/18/2022
7/18/2022	Invoice	701499	0.00	0.00	7/18/2022
7/18/2022	Invoice	701498	0		

C&T Billing Cheat Sheet for Legal Staff: Contact and Matter Lists

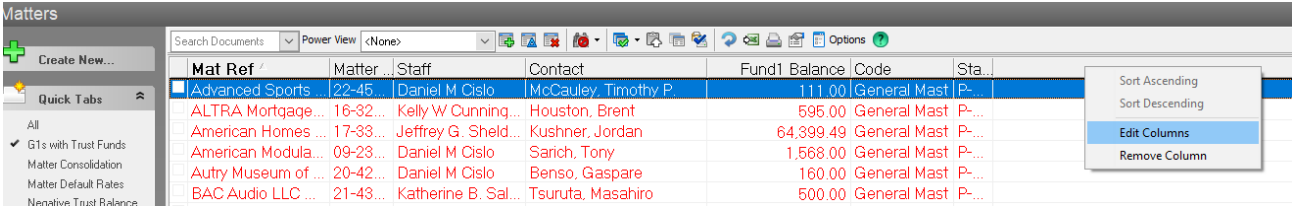
Display Billing Information on Contact and Matter Lists

1. Right click anywhere on the header ribbon on the list and select 'Edit Columns'

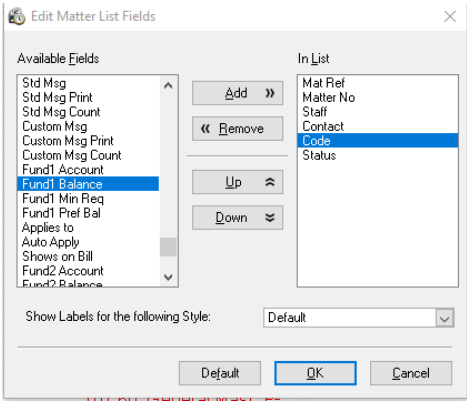
2. Scroll down the "Available Fields" list until the find the desired field(s) and use the Add button to move them over to the "In List" section. You can use the Up or Down buttons to adjust what order to display your field in. Press Ok when finished.

3. Some fields to consider adding:

- a. Balance—Shows the total amount owed
- b. Over 121 Days—Shows the amount owed that was billed 121 or more days ago
- c. Trust1 Balance—Shows current trust balance (only available on the Matters List)



Mat Ref	Matter	Staff	Contact	Fund1 Balance	Code	Sta
Advanced Sports	22-45	Daniel M Ciso	McCauley, Timothy P.	111.00	General Mast	P...
ALTRA Mortgage	16-32	Kelly W Cunning	Houston, Brent	595.00	General Mast	P...
American Homes	17-33	Jeffrey G. Sheld	Kushner, Jordan	64,399.49	General Mast	P...
American Modula	09-23	Daniel M Ciso	Sarich, Tony	1,568.00	General Mast	P...
Autry Museum of	20-42	Daniel M Ciso	Benso, Gaspare	160.00	General Mast	P...
BAC Audio LLC	21-43	Katherine B. Sal	Tsuruta, Masahiro	500.00	General Mast	P...



Available Fields

- Std Msg
- Std Msg Print
- Std Msg Count
- Custom Msg
- Custom Msg Print
- Custom Msg Count
- Fund1 Account
- Fund1 Balance
- Fund1 Min Req
- Fund1 Pref Bal
- Applies to
- Auto Apply
- Shows on Bill
- Fund2 Account
- Fund2 Balance

In List

- Mat Ref
- Matter No
- Staff
- Contact
- Code
- Status

Show Labels for the following Style: Default

Buttons: Add, Remove, Up, Down, Default, OK, Cancel

Mat Ref	Matter No	Contact	Staff	Fund1 Balance	Balance
Heat-not-Burn Device II (National Phase) (EU)	22-45707	Chong, Alex	Peter S Veregge	10,000.00	0.00
Heat-not-Burn Device II (National Phase) (Indonesia)	22-45709	Chong, Alex	Peter S Veregge	5,000.00	0.00
Heat-not-Burn Device II (National Phase) (Canada)	22-45705	Chong, Alex	Peter S Veregge	5,000.00	0.00
Heat-not-Burn Device II (National Phase) (India)	22-45708	Chong, Alex	Peter S Veregge	5,000.00	0.00
Heat-not-Burn Device II (National Phase) (Vietnam)	22-45713	Chong, Alex	Peter S Veregge	5,000.00	0.00
Heat-not-Burn Device II (National Phase) (Japan)	22-45712	Chong, Alex	Peter S Veregge	5,000.00	0.00
Heat-not-Burn Device II (National Phase) (China)	22-45706	Chong, Alex	Peter S Veregge	5,000.00	0.00
Heat-not-Burn Device II (National Phase) (Brazil)	22-45711	Chong, Alex	Peter S Veregge	5,000.00	0.00
Heat-not-Burn Device II (National Phase) (Russia)	22-45710	Chong, Alex	Peter S Veregge	5,000.00	0.00
Heat-not-Burn Device II (National Phase) (Philippines)	22-45714	Chong, Alex	Peter S Veregge	2,842.42	0.00
Patentability Search and Opinion for "Heat-Not-Burn Device"	18-36648	Chong, Alex	Peter S Veregge	0.00	0.00
Heat-Not-Burn Device and Method (Brazil)(Div)	20-42613	Chong, Alex	Peter S Veregge	0.00	0.00

View Trust Balances for All of Client's Matter

1. Edit your Matter List to display the "Trust1 Balance" Field (see the instructions to the left)
2. Type the client's name into the search bar to bring up their matters
3. Click on the top of the "Fund1Balance" column to sort from highest to lowest balance; this will bring all the matters with fund balances to the top

Questions?
