

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: [] ☐ Notify ☐ T

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	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
6/17/2022	Invoice	6991	0.00	0.00	6/17/2022
6/17/2022	Invoice	6990	0.00	0.00	6/17/2022
6/17/2022	Invoice	6989	0.00	0.00	6/17/2022
6/17/2022	Invoice	6988	0.00	0.00	6/17/2022
6/17/2022	Invoice	6987	0.00	0.00	6/17/2022
6/17/2022	Invoice	6986	0.00	0.00	6/17/2022
6/17/2022	Invoice	6985	0.00	0.00	6/17/2022
6/17/2022	Invoice	6984	0.00	0.00	6/17/2022
6/17/2022	Invoice	6983	0.00	0.00	6/17/2022
6/17/2022	Invoice	6982	0.00	0.00	6/17/2022
6/17/2022	Invoice	6981	0.00	0.00	6/17/2022
6/17/2022	Invoice	6980	0.00	0.00	6/17/2022
6/17/2022	Invoice	6979	0.00	0.00	6/17/2022
6/17/2022	Invoice	6978	0.00	0.00	6/17/2022
6/17/2022	Invoice	6977	0.00	0.00	6/17/2022
6/17/2022	Invoice	6976	0.00	0.00	6/17/2022
6/17/2022	Invoice	6975	0.00	0.00	6/17/2022
6/17/2022	Invoice	6974	0.00	0.00	6/17/2022
6/17/2022	Invoice	6973	0.00	0.00	6/17/2022
6/17/2022	Invoice	6972	0.00	0.00	6/17/2022
6/17/2022	Invoice	6971	0.00	0.00	6/17/2022
6/17/2022	Invoice	6970	0.00	0.00	6/17/2022
6/17/2022	Invoice	6969	0.00	0.00	6/17/2022
6/17/2022	Invoice	6968	0.00	0.00	6/17/2022
6/17/2022	Invoice	6967	0.00	0.00	6/17/2022
6/17/2022	Invoice	6966	0.00	0.00	6/17/2022
6/17/2022	Invoice	6965	0.00	0.00	6/17/2022
6/17/2022	Invoice	6964	0.00	0.00	6/17/2022
6/17/2022	Invoice	6963	0.00	0.00	6/17/2022
6/17/2022	Invoice	6962	0.00	0.00	6/17/2022
6/17/2022	Invoice	6961	0.00	0.00	6/17/2022
6/17/2022	Invoice	6960	0.00	0.00	6/17/2022
6/17/2022	Invoice	6959	0.00	0.00	6/17/2022
6/17/2022	Invoice	6958	0.00	0.00	6/17/2022
6/17/2022	Invoice	6957	0.00	0.00	6/17/2022
6/17/2022	Invoice	6956	0.00	0.00	6/17/2022
6/17/2022	Invoice	6955	0.00	0.00	6/17/2022
6/17/2022	Invoice	6954	0.00	0.00	6/17/2022
6/17/2022	Invoice	6953	0.00	0.00	6/17/2022
6/17/2022	Invoice	6952	0.00	0.00	6/17/2022
6/17/2022	Invoice	6951	0.00	0.00	6/17/2022
6/17/2022	Invoice	6950	0.00	0.00	6/17/2022
6/17/2022	Invoice	6949	0.00	0.00	6/17/2022
6/17/2022	Invoice	6948	0.00	0.00	6/17/2022
6/17/2022	Invoice	6947	0.00	0.00	6/17/2022
6/17/2022	Invoice	6946	0.00	0.00	6/17/2022
6/17/2022	Invoice	6945	0.00	0.00	6/17/2022
6/17/2022	Invoice	6944	0.00	0.00	6/17/2022
6/17/2022	Invoice	6943	0.00	0.00	6/17/2022
6/17/2022	Invoice	6942	0.00	0.00	6/17/2022
6/17/2022	Invoice	6941	0.00	0.00	6/17/2022
6/17/2022	Invoice	6940	0.00	0.00	6/17/2022
6/17/2022	Invoice	6939	0.00	0.00	6/17/2022
6/17/2022	Invoice	6938	0.00	0.00	6/17/2022
6/17/2022	Invoice	6937	0.00	0.00	6/17/2022
6/17/2022	Invoice	6936	0.00	0.00	6/17/2022
6/17/2022	Invoice	6935	0.00	0.00	6/17/2022
6/17/2022	Invoice	6934	0.00	0.00	6/17/2022
6/17/2022	Invoice	6933	0.00	0.00	6/17/2022
6/17/2022	Invoice	6932	0.00	0.00	6/17/2022
6/17/2022	Invoice	6931	0.00	0.00	6/17/2022
6/17/2022	Invoice	6930	0.00	0.00	6/17/2022
6/17/2022	Invoice	6929	0.00	0.00	6/17/2022
6/17/2022	Invoice	6928	0.00	0.00	6/17/2022
6/17/2022	Invoice	6927	0.00	0.00	6/17/2022
6/17/2022	Invoice	6926	0.00	0.00	6/17/2022
6/17/2022	Invoice	6925	0.00	0.00	6/17/2022
6/17/2022	Invoice	6924	0.00	0.00	6/17/2022
6/17/2022	Invoice	6923	0.00	0.00	6/17/2022
6/17/2022	Invoice	6922	0.00	0.00	6/17/2022
6/17/2022	Invoice	6921	0.00	0.00	6/17/2022
6/17/2022	Invoice	6920	0.00	0.00	6/17/2022
6/17/2022	Invoice	6919	0.00	0.00	6/17/2022
6/17/2022	Invoice	6918	0.00	0.00	6/17/2022
6/17/2022	Invoice	6917	0.00	0.00	6/17/2022
6/17/2022	Invoice	6916	0.00	0.00	6/17/2022
6/17/2022	Invoice	6915	0.00	0.00	6/17/2022
6/17/2022	Invoice	6914	0.00	0.00	6/17/2022
6/17/2022	Invoice	6913	0.00	0.00	6/17/2022
6/17/2022	Invoice	6912	0.00	0.00	6/17/2022
6/17/2022	Invoice	6911	0.00	0.00	6/17/2022
6/17/2022	Invoice	6910	0.00	0.00	6/17/2022
6/17/2022	Invoice	6909	0.00	0.00	6/17/2022
6/17/2022	Invoice	6908	0.00	0.00	6/17/2022
6/17/2022	Invoice	6907	0.00	0.00	6/17/2022
6/17/2022	Invoice	6906	0.00	0.00	6/17/2022
6/17/2022	Invoice	6905	0.00	0.00	6/17/2022
6/17/2022	Invoice	6904	0.00	0.00	6/17/2022
6/17/2022	Invoice	6903	0.00	0.00	6/17/2022
6/17/2022	Invoice	6902	0.00	0.00	6/17/2022
6/17/2022	Invoice	6901	0.00	0.00	6/17/2022
6/17/2022	Invoice	6900	0.00	0.00	6/17/2022
6/17/2022	Invoice	6899	0.00	0.00	6/17/2022
6/17/2022	Invoice	6898	0.00	0.00	6/17/2022
6/17/2022	Invoice	6897	0.00	0.00	6/17/2022
6/17/2022	Invoice	6896	0.00	0.00	6/17/2022
6/17/2022	Invoice	6895	0.00	0.00	6/17/2022
6/17/2022	Invoice	6894	0.00	0.00	6/17/2022
6/17/2022	Invoice	6893	0.00	0.00	6/17/2022
6/17/2022	Invoice	6892	0.00	0.00	6/17/2022
6/17/2022	Invoice	6891	0.00	0.00	6/17/2022
6/17/2022	Invoice	6890	0.00	0.00	6/17/2022
6/17/2022	Invoice	6889	0.00	0.00	6/17/2022
6/17/2022	Invoice	6888	0.00	0.00	6/17/2022
6/17/2022	Invoice	6887	0.00	0.00	6/17/2022
6/17/2022	Invoice	6886	0.00	0.00	6/17/2022
6/17/2022	Invoice	6885	0.00	0.00	6/17/2022
6/17/2022	Invoice	6884	0.00	0.00	6/17/2022
6/17/2022	Invoice	6883	0.00	0.00	6/17/2022
6/17/2022	Invoice	6882	0.00	0.00	6/17/2022
6/17/2022	Invoice	6881	0.00	0.00	6/17/2022
6/17/2022	Invoice	6880	0.00	0.00	6/17/2022
6/17/2022	Invoice	6879	0.00	0.00	6/17/2022
6/17/2022	Invoice	6878	0.00	0.00	6/17/2022
6/17/2022	Invoice	6877	0.00	0.00	6/17/2022
6/17/2022	Invoice	6876	0.00	0.00	6/17/2022
6/17/2022	Invoice	6875	0.00	0.00	6/17/2022
6/17/2022	Invoice	6874	0.00	0.00	6/17/2022
6/17/2022	Invoice	6873	0.00	0.00	6/17/2022
6/17/2022	Invoice	6872	0.00	0.00	6/17/2022
6/17/2022	Invoice	6871	0.00	0.00	6/17/2022
6/17/2022	Invoice	6870	0.00	0.00	6/17/2022
6/17/2022	Invoice	6869	0.00	0.00	6/17/2022
6/17/2022	Invoice	6868	0.00	0.00	6/17/2022
6/17/2022	Invoice	6867	0.00	0.00	6/17/2022
6/17/2022	Invoice	6866	0.00	0.00	6/17/2022
6/17/2022	Invoice	6865	0.00	0.00	6/17/2022
6/17/2022	Invoice	6864	0.00	0.00	6/17/2022
6/17/2022	Invoice	6863	0.00	0.00	6/17/2022
6/17/2022	Invoice	6862	0.00	0.00	6/17/2022
6/17/2022	Invoice	6861	0.00	0.00	6/17/2022
6/17/2022	Invoice	6860	0.00	0.00	6/17/2022
6/17/2022	Invoice	6859	0.00	0.00	6/17/2022
6/17/2022	Invoice	6858	0.00	0.00	6/17/2022
6/17/2022	Invoice	6857	0.00	0.00	6/17/2022
6/17/2022	Invoice	6856	0.00	0.00	6/17/2022
6/17/2022	Invoice	6855	0.00	0.00	6/17/2022
6/17/2022	Invoice	6854	0.00	0.00	6/17/2022
6/17/2022	Invoice	6853	0.00	0.00	6/17/2022
6/17/2022	Invoice	6852	0.00	0.00	6/17/2022
6/17/2022	Invoice	6851	0.00	0.00	6/17/2022
6/17/2022	Invoice	6850	0.00	0.00	6/17/2022
6/17/2022	Invoice	6849	0.00	0.00	6/17/2022
6/17/2022	Invoice	6848	0.00	0.00	6/17/2022
6/17/2022	Invoice	6847	0.00	0.00	6/17/2022
6/17/2022	Invoice	6846	0.00	0.00	6/17/2022
6/17/2022	Invoice	6845	0.00	0.00	6/17/2022
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6/17/2022	Invoice	6843	0.00	0.00	6/17/2022
6/17/2022	Invoice	6842	0.00	0.00	6/17/2022
6/17/2022	Invoice	6841	0.00	0.00	6/17/2022
6/17/2022	Invoice	6840	0.00	0.00	6/17/2022
6/17/2022	Invoice	6839	0.00	0.00	6/17/2022
6/17/2022	Invoice	6838	0.00	0.00	6/17/2022
6/17/2022	Invoice	6837	0.00	0.00	6/17/2022
6/17/2022	Invoice	6836	0.00	0.00	6/17/2022
6/17/2022	Invoice	6835	0.00	0.00	6/17/2022
6/17/2022	Invoice	6834	0.00	0.00	6/17/2022
6/17/2022	Invoice	6833	0.00	0.00	6/17/2022
6/17/2022	Invoice	6832	0.00	0.00	6/17/2022
6/17/2022	Invoice	6831	0.00	0.00	6/17/2022
6/17/2022	Invoice	6830	0.00	0.00	6/17/2022
6/17/2022	Invoice	6829	0.00	0.00	6/17/2022
6/17/2022	Invoice	6828	0.00	0.00	6/17/2022
6/17/2022	Invoice	6827	0.00	0.00	6/17/2022
6/17/2022	Invoice	6826	0.00	0.00	6/17/2022
6/17/2022	Invoice	6825			

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'



Mat Ref	Matter	Staff	Contact	Fund1 Balance	Code	Sta
Advanced Sports	22-45...	Daniel M Cislo	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 Cislo	Sarich, Tony	1,568.00	General Mast	P...
Autry Museum of ...	20-42...	Daniel M Cislo	Benso, Gaspare	160.00	General Mast	P...
BAC Audio LLC ...	21-43...	Katherine B. Sal...	Tsuruta, Masahiro	500.00	General Mast	P...

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.



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.

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 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