#### 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
- Right Click the recently dated invoice and select "Reprint Bill"

## 2. View Client's Current Outstanding

- 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

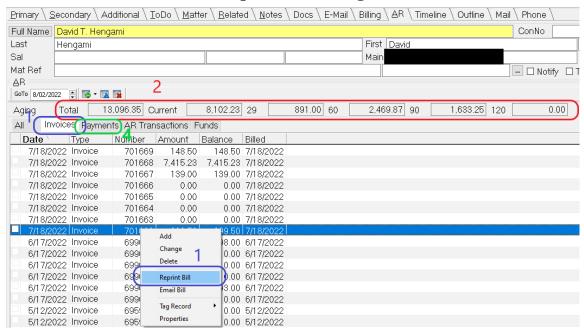
- Open AR Tab on the Matter page
- 2. Click the drop-down arrow next to the "Aging" Box and Select "Trust"; the number displayed is the amount of trust funds on the matter

## 4. Check If Client Has Paid Towards Balance

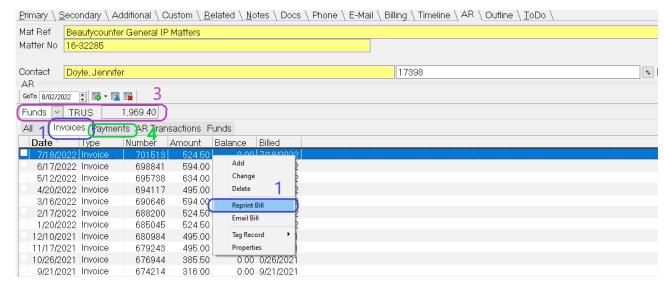
- Open the AR Tab on the Client page
- 2. Click the "Payments"

  Tab; the list will now display all payments the client has made

#### Example Client Page



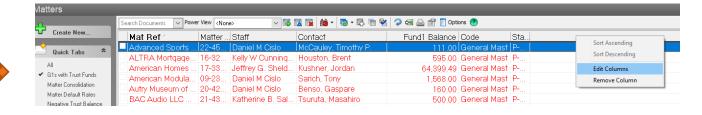
#### Example Matter Page

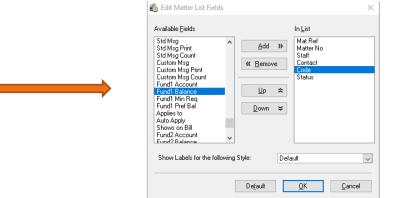


#### C&T Billing Cheat Sheet for Legal Staff: Contact and Matter Lists

# Display Billing Information on Contact and Matter Lists

- 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.
- Some fields to consider adding:
  - Balance—Shows the total amount owed
  - o. 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)





#### View Trust Balances for All of Client's Matter

- L. 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

| 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    |