



C&T Billing Training: Bill Entries and Invoice Breakdown

12 OCTOBER 2022

Overview of Topics

- Review Prior Training
- Billing Tab and How to Make a Billing Entry
- How to Read an Invoice

Review Time!

1. What is the Invoice Number of Robert (Bob) Demars' most recent invoice?
2. What is David Hengami's outstanding balance as of today?
3. What amount of trust funds are available on matter no. 22-45549?
4. What is the date of Kara Kuiper's last payment and how much did they pay?

Review Answers

1. What is the Invoice Number of Robert (Bob) Demars' most recent invoice?
707421
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2. What is David Hengami's outstanding balance as of today?
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3. What amount of trust funds are available on matter no. 22-45549?
\$10,000.00
4. What is the date of Kara Kuiper's last payment and how much did they pay?
\$50,000, 9/30/2022

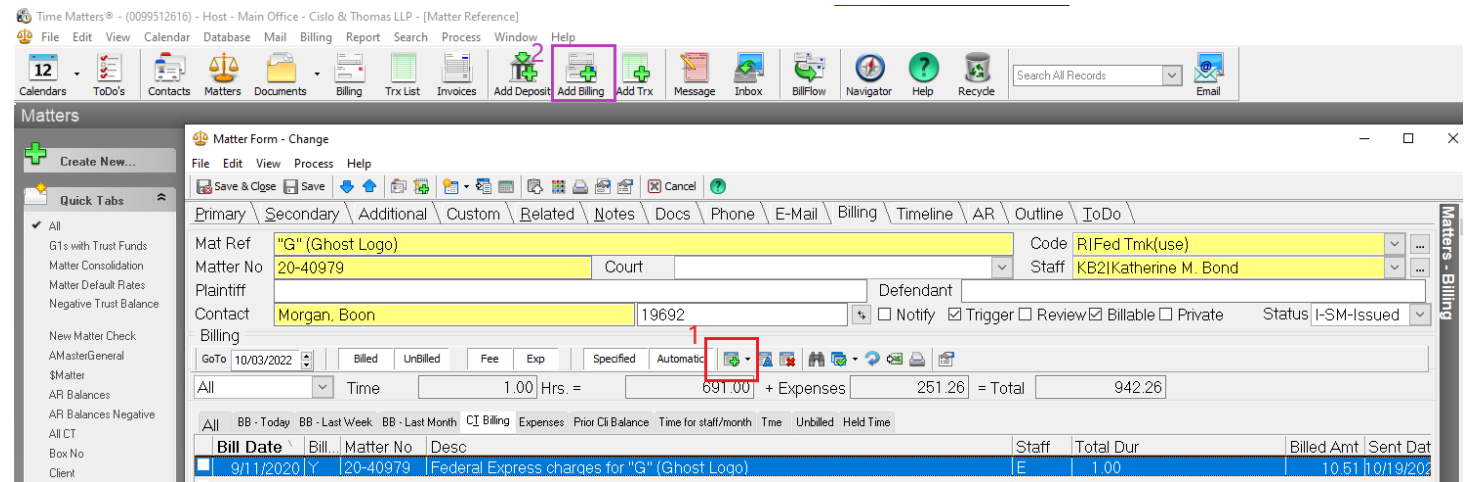
Billing Tab

- Displays both billed and unbilled related to the client/matter (1)
 - **IMPORTANT:** Other staff members' time entries will NOT necessarily appear for all users. Please contact Billing if you need a report for all billing entries related to a client/matter
- Summarizes the time and expenses currently being viewed (2)
- Can sort by whether the charges are billed or unbilled, or whether a charge is staff time entry or expense (3)

Billing									
GoTo	10/03/2022	Billed		UnBilled	Fee	Exp	Specified	Automatic	
All		Time	831.38	Hrs. =	293,600.85	+ Expenses	51,184.80	= Total	344,785.65
1	BB - Today	BB - Last Week	BB - Last Month	LL Billing	Expenses	Prior Cl Balance	Time for staff/month	Time	Unbilled Held Time
Bill Date	Bill...	Matter No	Desc	Staff	Total Dur	Billed Amt	Sent Date		
9/29/2022	N	22-45217	Finalize and send Letter to Client Enclosing Draft Settlement Agreement regarding...	SN	0.30	70.50			
9/27/2022	N	22-45217	Finalize and send Letter to Trechsel re Settlement (final offer) for Dr. Elliot McGuck...	SN	0.20	47.00			
9/26/2022	N	22-45217	Teleconference with opposing counsel and addressed possible counter-offer and c...	DAN	0.90	558.00			
9/26/2022	N	22-45217	Finalize and send Letter to Client Re Reduced Settlement Demand from Plaintiff f...	SN	0.30	70.50			
9/19/2022	N	22-45217	Finalize and send Letter to Trechsel in Response to Settlement Offer regarding Dr....	SN	0.20	47.00			
9/19/2022	N	22-45217	Communications with client and revised settlement proposal and communication wi...	DAN	0.40	248.00			
9/16/2022	N	22-45217	Finalize and send Letter to Client Re Proposed Letter to Opposing Counsel re Settl...	SN	0.40	94.00			
9/15/2022	N	21-44567	Review status with USPTO and draft Letter to Client regarding Status of GSEP Tra...	SN	0.40	94.00			
9/15/2022	N	21-44567	Review status of application at the USPRO and Draft letter to client re GESP	TAR	0.30	70.50			
9/09/2022	N	22-45217	Finalize and send Letter to Frank Trechsel Re Settlement for Dr. Elliot McGucken v...	SN	0.20	47.00			
9/09/2022	N	22-45217	Finalize and send Beazley Defense Guidelines executed September 9, 2022 re qar...	SN	0.20	47.00			
9/08/2022	N	22-45217	Finalize and send Letter to Client Re Proposed Letter to Opposing Counsel for Dr. ...	SN	0.30	70.50			
8/30/2022	Y	22-45217	Revise, finalize and send Letter to Trechsel Re Settlement for Dr. Elliot McGucken ...	SN	0.40	94.00	9/19/2022		
8/30/2022	Y	22-45217	Letter to Trechsel Re Settlement and work on underlying issues	DAN	0.20	124.00	9/19/2022		
8/30/2022	Y	21-43776	Letter to Client Confirming Response to Office Action Filed and work on underlying ...	DAN	0.20	124.00	9/19/2022		
8/29/2022	Y	19-38820	Letter to Client Confirming Power of Attorney and Sections 8 & 15 Filed and work o...	DAN	0.20	124.00	9/19/2022		
8/29/2022	Y	21-43776	Fully-Executed Response to Office Action as filed and work on underlying issues	DAN	0.20	124.00	9/19/2022		

Creating Billing Entries

- Time Matters supports many different methods for creating billing entries. The most straightforward is by clicking the “New Record” button [(1), Shortcut CTRL+Shift+B] from the Client or Matter Billing tab
- If you have added the “Add Billing” Icon to your top ribbon (2), you can open a new billing entry without needing to navigate to the billing tab



Creating Billing Entries

- 1) Toggles between a Time Entry and Expense Entry
 - For expenses, make sure the staff and code are changed to Expense
- 2) Make sure Duration/Quantity are set to a positive number
- 3) Can toggle between per hour or flat rate billing
 - Flat rate make the total billing equal to the rate amount, no matter the duration/quantity

The screenshot shows the 'Billing Item Form - Add' window. The 'Expense Entry Information' section is active. The 'Exp Code' is set to '1' (highlighted with a red box). The 'Staff' is 'Simon, Daniel' and the 'Code' is 'EXPExpense'. The 'Quantity' is '0.00' (highlighted with a purple box). The 'Rate Type' is 'Per Unit' (highlighted with a green box). The 'Bill Date' is '10/03/2022'. The 'Memo' field is empty (highlighted with a green box). The 'Overrides and Totals' section shows 'Markup/Disc' at 0.00%, 'Adjustment' at 0.00%, and 'No Charge Qty' at 0.00.

The screenshot shows the 'Billing Item Form - Add' window. The 'Billing Details' section is active. The 'Time Code' is set to '1' (highlighted with a red box). The 'Staff' is 'DANIDaniel M Ciso'. The 'Total Dur' is '0.00' (highlighted with a purple box). The 'Rate Type' is 'Per Hour' (highlighted with a green box). The 'Memo' field is empty (highlighted with a green box). The 'Overrides and Totals' section shows 'Markup/Disc' at 0.00%, 'Adjustment' at 0.00%, and 'No Charge Hours' at 0.00.

1



Cislo & Thomas LLP
12100 Wilshire Blvd, Suite 1700
Los Angeles, CA 90025

Tel (310) 979-9190 Fax (310) 394-4477
www.cislo.com
 Tax ID. No. 94-3304661

Rigel Products
 Attn: Shane Patrick Smith
 2401 S. Hill Street, #B
 Los Angeles, CA 90007

Date: 8/18/2022
 Invoice No.: 706460

Consolidated Summary

Matter		New Charges	Prev Bal	Payments	Bal Due
10-24354	General File for Shane Smith	\$0.00	\$171.36	\$0.00	\$171.36
16-31583	Combination Brush and Jag (France)	\$257.00	\$0.00	\$0.00	\$257.00
16-31597	Firearm Barrel Cleaning Patches (France)	\$774.70	\$0.00	\$-774.70	\$0.00
16-31595	Firearm Barrel Cleaning Patches (Germany)	\$1,251.44	\$0.00	\$-1,251.44	\$0.00
16-31594	Firearm Barrel Cleaning Patches (Italy)	\$1,412.41	\$118.00	\$-1,412.41	\$118.00
11-24590	Firearm Barrel Cleaning Patches (Russia)	\$326.50	\$118.00	\$-326.50	\$118.00
16-31596	Firearm Barrel Cleaning Patches (UK)	\$711.78	\$0.00	\$-711.78	\$0.00
Subtotals:		\$4,733.83	\$407.36	\$-4,476.83	
Current Outstanding Balance:					\$664.36

6

Thank you for giving Cislo & Thomas LLP the opportunity to serve your intellectual property needs. We are committed to serving you with the highest standard of excellence in all we do. If you feel there is any way we can improve the quality of our service we would love to hear from you.

Please make checks payable to: Cislo & Thomas LLP and reference your invoice number. For credit card payment, please contact our Billing Department at: (310) 979-9190 Ext. 242. There is a 2.8% charge for credit card payments.

For wiring payment in U.S. dollars, use routing no. 122000496, account no. 7501003680, Union Bank of California, 11661 San Vicente Blvd., Los Angeles, CA 90049 (310-571-4472).

To pay this invoice online, please go to: www.cislo.com/pay.

Payment due upon receipt. Any payments received after the invoice date will be reflected on the next bill.

If you have any questions or comments regarding this bill, please do not hesitate to contact our Billing Department at (310) 979-9190 Ext. 242 or billing@cislo.com.

Reading an Invoice (Summary Page)

- Header (1)
 - Pulls Address Block from Client Page by default
- Consolidated Summary
 - New Charges (2)
 - Usually from the previous month, but can be older if the charges have not already been billed
 - Previous Balance (3)
 - Payments (4)
 - Includes both client payments and applications of trust funds
 - Balance Due (5)
 - Bolded “Current Outstanding balance” shows the total amount open on their matters as of the bill’s creation
- Billing Message Footer (6)

Firearm Barrel Cleaning Patches (Italy)
16-31594

1	BALANCE DUE	\$118.00
	Previous Balance	\$118.00
	Total New Charges	\$1,412.41
	8/18/2022 Apply Funds to AR	\$-1,412.41
	Total Payments and Credits	\$-1,412.41

This Month's Legal Services for This Matter

2

Date	Description	Hours		
7/13/2022	Letter to foreign associate requesting payment of 2022 annuities and work on underlying issues	0.30		
7/13/2022	Preparation of letter to foreign associates instructing payment of annuity in Germany, France, UK, and Italy	0.50		
Total Time This Month		0.80		
Total Fees This Month		\$356.00		
Staff Summary				
Name	Position	Hours	Rate	Fees
Daniel M Cislo	Attorney	0.30	\$695.00	\$208.50
Laura Banuelos	IP Paralegal	0.50	\$295.00	\$147.50

This Month's Expenses for This Matter

3	Start Date	Description	Charges
	7/14/2022	Foreign associate fees for Firearm Barrel Cleaning Patches (Italy) for 14th annuity	\$1,056.41
		Total Expenses This Month	\$1,056.41

4	Previous Balance of Trust Account--Cislo & Thomas LLP	\$1,300.00
	8/18/2022 Deposit Trust to Trust Transfer	\$225.30

Reading an Invoice (Matter Detail Page)

- Following Summary Page, each matter with activity will have matter detail page(s)
- Balance Summary (1)
 - Shows previous balance, new charges, any new payments or trust applications, and the current balance due on the matter
- Legal Fees (2)
 - Lists work performed by C&T staff members
- Expenses (3)
 - Lists expenses for outside vendors, government fees, and other outside expenses incurred on the client's behalf
- Trust Summary (4)
 - Show balance and activity for the matter's trust account, if any