

Log

Interbill opens to the Log because users spend most of their time recording entries on this screen.

The Log is divided into three horizontal sections. The top section is the Log itself, which is used to record, Fee, Cost, Payment, Trust, Retainer and Late Payment Charge entries.

The middle section very small is the entry search and reporting bar.

The last section is the Log Listing. It is a list of all unbilled entries. You can edit these entries.

The Log:

There are six or fewer tabs on The Log panel depending upon whether or not you selected to use Trusts, Retainer or Late Payment Charges in Settings. Each tab has a color dot: Fee = Blue, Cost = Purple, Payment = Green, Trust = Yellow, Retainer = Orange and Late Charge = Red. Once you record an entry the color of the entry appears to the left of the entry in the Log List.

Sizing the Log:

You can make The Log section bigger or smaller by clicking on the black line under the Save and other buttons and dragging down or up. You can also use double drag down symbol to the left of the binoculars symbol in the Entry Search and Reporting Bar

Recording Entries:

All types of entries, Fee, Cost, Payment, Trust, Retainer and Late Charge require a date, a client and an amount (or hours in fees which then computes the amount).

Date: Each entry defaults to current date. To change that date you can enter the date you want or select the date from the drop down menu.

Client ID: Not many users know the client ID they want, but if you do you can enter it here.

Client Name: The easiest way to enter a client is to start entering the client's name and select it from those that appear. You can also click on the drop down menu and select the client that way.

Matter ID and Matter Name: If your office does not use matters, Matter ID and Matter Name will not display. You can only post fee and cost entries to matters. Payments, Trusts, Retainers and Late Payment Charges can only be posted to a client.

Hours: Only the Fee tab has hours, when you enter an hour increment it will compute times the Timekeepers hourly rate for the Client/Matter. You will see the Timekeepers hourly rate next to the Timekeepers name. You can use the little +10 button next to Hours to enter 10th of an hour (six minutes) increments. For Flat Fee Entries type a Zero in hours and the Flat Fee Amount in "Amount". To issue hour credit to a client put a minus sign in front of the hours. Be sure if it is a decimal like 20th of an hour that you enter minus then the decimal e.g. -0.20. It will also create a credit amount which will display e.g. (\$30.00).

Amount: When you enter the hours the fee amount as computed by the timekeeper hourly rate will display in this box. You can override the computation by typing a different amount in "Amount". Also if you use either an hourly rated code or a flat rate code the use of that code will change this amount to the hourly or flat rate of the code. For no charge entries type a Zero in the amount. In the Description

field, type a description of the service and “No Charge”. To issue a credit amount to a client put a minus in front of the amount. It will display as E.g. (\$30.00) if you are not also crediting hours, enter a zero in hours.

Code: If you use codes (they are optional) you can start to type the code you want to use then select it, or select it from the drop down menu. You can create your own codes in the Codes screen. There is no limitation to the length of description the codes can produce.

Timekeeper: The default timekeeper is the logged in timekeeper, but you can select other timekeepers. When you select a different timekeeper that different timekeeper will remain as the timekeeper to which you are recording data. Be careful.

Timekeeper Rate: The Timekeeper Rate is for your information only you cannot enter data in this field.

Description: The next empty box is for free form description and code expansion; there is no limitation to what or how much you can enter.

Buttons: Save, Spell Check, Duplicate Previous, Clear. Use the Save button to save the entry. Once you save an entry it will appear below in the Log list until it is billed. Use the Spell Check button to Spell check the entry. Use the Clear button to clear the entry from your screen without saving it. Use “Duplicate Previous” to duplicate data from the previous saved entry to the current non-saved entry. Do that by clicking the cursor in the field to which you want to duplicate data from the previous entry and then click the duplicate previous button. Example if you want to duplicate description from the previous entry click in the “Description” field and then click the “Duplicate Previous” button.

Making the Log Description area bigger/smaller: On the dark bar, pull up or down with the mouse, to make the Description area bigger or smaller.

Finding Entries in the Log List: To find entries by date, type of entry (fee, cost, payment etc.), Timekeeper, Client Matter, Hours, Amount or Description, click on the spy glass symbol and enter the data for which you are searching in the appropriate field.

Unbilled entries for this month and today are totaled on the Finding Entries bar.

Log List: The rest of the screen is a listing of all unbilled log entries that are available to be edited or deleted. Editing and deleting is done by clicking the entry in the log list which will make it appear in the Log screen for editing or deleting. Log entries can also be edited and deleted in the Prebill screen.

Fee, Cost, Payment, Trust, Retainer and Late Charge tab characteristics:

Fee: The fee tab has an hours field other than that it is like the other screen tabs. For a flat fee enter a zero (0.00) in hours and the amount you want to the amount field.

Cost: Just enter the amount of the cost and use a cost code and/or description.

Payment: If you use matters, you will not see them on the Payment screen tab because payments are entered to clients not to matter. Payments are automatically posted to according to the formula you chose in the Settings/ Statement Settings screen. The default used by about 90% of Interbill users is to have payments pay for the oldest unpaid costs first, then the oldest unpaid fees and lastly the oldest unpaid late payment charges. To manually allocate payments to Fees, Costs and Late Payment Charges enter the amount of the payment then click on the color wheel to the right of “Amount”. A popup screen will show that the payment is set for automatic; you can click on the menu drop down display

symbol. A second popup will allow you to manually allocate the payment. You can view the previous client statement from either of the popup screens.

The description "Payment received, thank you." is the default payment description, these default descriptions can be changed or deleted in the Settings/Default Descriptions screen. You can change these descriptions on the log entry and or add to it. e.g. "Payment received, thank you. Your check number 45632 dated November 3, 2015".

Trust: The Trust entry screen tab is similar to the Payments screen tab except that there is an additional box from which you can select Trust, Deposit, Disbursement or Pay statement. Most Interbill users do not manually allocate client trust money they allow Interbill to automatically pay the clients statement from the Client's Trust and/or Retainer funds. Users can modify how trust money is handled in the Client screen, Trust/Retainer tab. Most users choose the default which automatically pays for statement charges Costs, first then Fees. Users can also select to pay Fees only or Costs only from a Client Trust or Retainer account. Select "Disbursement" from the drop down menu to disburse money out of the Client's Trust or Retainer account to pay for non-statement charges.

You can select to manually pay money out of Trust and Retainer accounts in client by client in the Client screen, Trust/Retainer tab.

Retainer: Instructions for posting retainers are the same as trust and referred to above in Trust.

Late Payment Charges: If you use Late Payment Charges they are automatically computed by Interbill. The only time you would use this log screen tab is to credit (write off) previously charged late payment charges. To write off a late payment charge, enter the charge in "Amount" with a minus sign in front. It will display in parentheses e.g. (\$25.60). Occasionally a user likes to charge a late payment charge manually but this is unusual.

End 12-29-15