Prebill

From the Prebill screen you can edit, delete and add entries. When you finish you can preview the edited client statement.

Clients available to view in the prebill are listed on the left panel of the screen. The first button allows you to select the default which is all clients with unbilled data or in the drop down menu, Clients with any balance, Clients with pending redrafts (more on that when we get to Statements) or All Clients regardless of whether they have unbilled or balances or pending redrafts.

Select or input a statement date from “Statement Date” which near the bottom of the left Prebill screen section.

To edit in the Prebill screen:

1. Select from the drop down menu if you want to view other than clients with unbilled data.
2. You can search for the client you want to select to edit in the Prebill screen or you can search for it then select it.
3. If you want to view the actual Preview of the Statement select Preview Client Statement next to the last button on the left panel. The date for the Preview is set for the current date, if you prefer another date select it before you start editing the prebill.
4. To edit the data on the Prebill screen (main panel) just move the cursor over the entry which will be outlined in light blue. Click in the entry.
5. An edit screen will display. You can change any data. There are drop down menus from which you can choose different clients and/or matters, type of entry and timekeeper. The most common changes are hours, type (Fee, Cost etc.) and Client/Matter.
6. You can add a new Log entry by selecting the + New Log Entry in the upper left corner of the Client Prebill screen.
7. The “Move Up” and “Move Down” buttons allow you to move entries before or after entries with the same date. Entries are grouped by type: Fees, Costs, Payments, Trusts, Retainers and Late Payment Charges.
8. Like the Log you have to Save the changed (edited) entry. Select the cancel button if you change your mind about editing the entry.

Preview Client Statement:

After you finish editing the client’s Prebill, you will want to spellcheck and preview the client’s statement. Make sure the Statement Date is correct, and then select “Spellcheck Client Logs” (last button, left section). Make the spelling corrections and then select “Preview Client Statement”. You can print a “Preview”. The word “Preview” will be printed on the client’s preview statement.

End Prebill screen – 12/29/15