

# **Interbill Attorney Billing Software Handbook**

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**Backup:** Unlike most online systems, Interbill allows you to backup all your data, separated by billed and unbilled, all your client data, rates, emails, telephone, start date addresses to your computer whenever you want. You press one button. It will backup data from the last 22 years, Jan 1, 2000. It is lightning fast, takes about 1 minute per user per 20 years of data. We recommend backing up once a week, just backup over your last backup.

Should you ever want to move to a different system, this backup data is all you need. It is downloaded in universal database compatible format.

### **Welcome to Interbill's Online Attorney Billing Software.**

You can use Interbill's software from anywhere in the world with access to the Internet. You will need your username and password and soon an authorization via your cell phone if you are using a computer for the first time. You can use Macs, or PCs or any type of tablet. You can also use a phone but currently the phone screens currently need reformatting to be more user friendly. However, in a pinch?

Your data is constantly backed up both on a parallel online system but also offline. We can restore accidentally deleted entries and clients.

Everything in Interbill is undoable. You can undo and fix billings and change any entries before or after it is billed. You can go back years and change an entry, transfer an entry and even change billing rates.

The following is an explanation of the workings of each of the six major Interbill functions, **Log** (logging entries); **Clients** (creating, closing and changing client information); **Prebill** (editing logged entries); **Statements** (creating, emailing, editing, undoing statements); - **History Statements** and **Reminder Statements**; **Reports** and **Settings** (creating firm wide addresses and options).

#### **The Log:**

On the Log you can record Fee, Cost, Payment, Late Charge, and, optionally, Trust and Retainer entries. You can also create, edit and delete codes and review and edit saved unbilled Log entries. The Log also displays the number of hours/fees the user has recorded for the day and month.

The Log is divided horizontally into two parts, The Log entry screen followed by the Saved Unbilled Log Entries List. **Date:** The default is today's date. If another date, type in the date or select the date from the drop-down calendar. You

can hold the date by selecting **HD** above Hours.

**Client ID:** (optional) Most users do not know the client ID so they begin typing the client's last name in the name field

and select the client's name with the mouse or tab when it appears,

**Client Name:** Start typing the client name when you type enough to narrow to the client, tab to choose the client and move to the Hours field.

**Hours:** Hours are in 10ths and 100ths. There is a button to add a 10<sup>th</sup> of an hour with each click. A 10<sup>th</sup> is 6 minutes. .25 is 15 minutes, .50 is 30 minutes, .75 is 45 minutes. When you enter the hours increment it will automatically compute times your hourly rate. There are many ways to change that amount if you want a different amount. The easiest is by entering the amount you want.

**User and User Rate:** The Logged-In user is the default, but Administrative and User 2 roles can change the user via the drop down and hold that User by clicking **HU** above Hours. Click **HU** again to change Users.

**Codes:** (optional) Currently Codes and their corresponding description are added, modified and deleted by the systems administrator. In a few months you will be able to manage your own codes and corresponding description. When you enter and tab through a code or select it with your mouse it will expand into description at the beginning or where your cursor is located.

**Description:** If you are using codes, you can also use free form description. For instance, you might have used a code that expanded to Telephone call with and then added Mr. John Baker.

**Save:** Press the save button.

Once you save an entry it will appear in the log entry list below.

#### **Some additional features:**

**Timers:** There are two Timers, the Single-Entry Log Timer which is an option and the Multi Entry Log Timer.

**Duplicate Previous:** Anytime you place your cursor in a data field and press this button it will duplicate data from the previous entry data field into this data field. Very handy for entries to the same client or date.

**Change a saved entry:** Select the entry on the log list, it will appear in the Log Form above make your change and save. **Delete a saved entry:** Select the entry on the Log List, it will appear in the Log Form above. Press the Delete button. **Clear the screen** (non-saved entries): Press the Clear button.

**HD – Press to Hold changed Date.** Will turn green when on. Press again to deactivate.

**HU – Press to Hold changed User.** Will turn green. Press again to deactivate.

**FF - Making a Flat Fee entry:** Press FF and enter the (fee) Amount.

**NC - Making a No Charge entry:** Press NC and enter hours.

**CD - Making a CD - Courtesy Discount entry.** Press CD and enter (discount fee) Amount.

**UO - Press UO to the left of the search magnifying glass** to Display User Only entries in the Saved Unbilled.

**LL – Log List.** Press and select dates and data arrangements to Display and print Log Fee Entries.

#### **Clients:**

The Clients Screen is used to open new clients, change information about existing clients and inactivate clients. The screen is divided into two sections.

On the left side is the client list with a tab for Active Clients (the default and Inactive clients). You can search for either Active or Inactive clients using search. The Active and Inactive Clients can be arranged in Client Name or Client ID order by clicking on the column heads. When the client is selected on the left side of the

screen, the Client information is displayed on the right screen side. For selected clients you can edit pre-existing client information.

**To Open A New Client: Click Open New Client** (bottom left side): You will create a blank screen.

**Name:** (main screen top left) Enter the Client's name, last name first or entity name. Press the Duplicate

Client button to duplicate information from an Active or Inactive Client.

**Bill type:** Unless this client is other than Hourly, leave Bill Type as Hourly. If not, click the down arrow and select another Bill Type.

**ID:** Each client is assigned a client Id automatically the next available number. If you want to use a different ID identification scheme you can use anything including the client's name, just enter here. You can change a Client ID at any time and all billing data billed and unbilled will be moved to the new ID.

**Late charge:** (Optional) You can charge a Flat monthly amount or a percent of the balance due computed daily on the selected annualized rate. You can create and change for single clients in the Clients screen or create and change for all clients in the Settings Screen/Statement Settings.

**Contact Info.:** Enter the Client's name and address exactly the way you want it to appear for mailing on the bill. If you will be emailing the billing statement, it is a good idea to at least fill out the Addressee.

**Matter:** Enter the Name of the matter: E.g. Estate Planning, Dissolution, Post Judgement Matters etc. In this data area, there is space to further describe the matter including case numbers, court numbers etc.

**Matter Rates:** The users default rate appears here when opened. If you want to change that rate for a client, double click on the default rate and change it. You will be asked if you want to recalculate unbilled entries.

**Phone Numbers:** Name first, Number Second. You can enter as many as you want.

**Email Addresses:** Name First, Email next and click email statement for each email address to receive a copy of the statement. **Save:** Be sure to save.

**To Change Client Information:** Select the client: (left screen panel) client information will be displayed on the main right screen panel. Change any information and **Save**

**Inactivating a Client:** Inactivating simply marks a client as Inactive. No billings are lost, no balance due or unbilled are lost. Everything stays the same, except that the client no longer appears with Active Clients. You can reactivate an inactive client at any time.

Click **Inactivate This Client** (bottom screen right). A dialogue box will ask you if you are sure and you respond Yes.

**Reactivating A Client:**

From top left, select **Inactive Clients**. Search for Client by name or number, select by highlighting and Click

**Reactivate This Client** bottom right. **Respond Yes to the dialogue box.**

There are seven additional tabs or sub-screens for Clients. These are used as follows:

**Balances:** Used to view Billed Statements.

**Trust/Retainer:** To enter Client Trust and Retainer. See Special Help Instructions for Trusts/Retainers.

**Statement Options:** To select Statement Address, if office uses more than one; to select Statement Due Date; to select Electronic Billing; and to enter a Statement message.

**Duplicate Statement:** To create duplicate statements for additional client who are sharing the payment of the statement.

**Installment Billing:** To enter an installment bill amount and to enter a Statement Message for the Installment amount.

**Recurring Charges:** To enter recurring statement charges or credits. **Notes:** To enter notes on a client. No limit to how long or how many notes. **End**

## Prebill

The Prebill screen displays unbilled entries organized by client. It also provides you with a Preview Statement so you can see exactly how a client's statement will look and whether you need to edit any entries. Editing includes, deleting entries, modifying entries and adding entries. You can change anything about an entry, the type of entry (fee, cost, payment etc.) The client, the user, hours, amounts and description.

### To edit in Prebill:

1. On the Prebill screen left panel, click on the client for which you want to view and possibly change entries. (If you do not see the client, there is a search box above the client list into which you can type the client's ID or Name.)
2. Once you have selected the client, entries for that client will be displayed on the main right panel of the screen. Entries are displayed by type of entry, Fees, Costs, Payments, Trusts and Retainers. Click on the entry you want to edit.
3. You can add a new Log entry by selecting the +New Log Entry in the upper right corner of the Client Prebill screen.
4. The "Move Up" and "Move Down" buttons allow you to move entries before or after entries with the same date.
5. Click the cancel button if you change your mind or click Save to save your edits.

### Preview Client Statement:

1. If you want to preview the client statement, while the client is still selected, on the left panel, click the second button from the bottom "Preview Client Statement". The Statement will include all entries through the Statement Date displayed above "Preview Client Statement".
2. If you haven't spell checked entries in the Logs, you can Spellcheck them at this time.

## Statements

You can bill a client any time. You can bill one or two clients, or you can bill all clients. Most offices bill a handful of clients during the month and bill most clients at the end of the month.

### Billing one or a few Individual clients:

Go to Statements. Select Statement Date. (screen right – under Statement Functions)  
Click email if emailing one or more statements. (below Statement Date)

On far left, Bill column, select each statement to be billed. (If you do not see the client, you can search by Client Name or Client ID in the top search area.

To Preview selected client statements, click the Preview button (screen right - second from the bottom).

To bill, click the last (green) button on the right, Bill Selected Clients.

If you checked Email Statements to Clients, the email popup window will display.

### **Billing all clients with entries to be billed:**

#### **(The following functions are all done on Under Statement Functions, screen right)**

Go to Statements. Select Statement Date.

Click email if emailing one or more statements.

Click Select Ready-to-Bill Clients. (On-Request Clients will not be selected)

On popup, click yes to include balance due only statements.

To Preview selected client statements, click second from bottom button.

To bill, click the last (green) button, Bill Selected Clients.

If you checked Email Statements to Clients, the email popup window will display.

### **Undo a billing:**

You can undo individual client statements or all statements in a batch. You can undo multiple statements for any period of time.

### **Undoing individual Statements:**

Go to Statements. Click on the Billed Statements tab.

Select the statement(s) you want to undo (selection boxes screen left).

Click Undo Statement under Individual Statement Functions (top screen right).

### **Undoing an entire batch (all statements that were billed together at the same date/time)**

Go to Statements. Click on the Billed Statements tab.

Select the first client in the batch. (selection boxes screen left).

### **(do not select more than one client).**

Click Undo Statement Batch. (screen right, Under Batch Statement Functions)

### **Redraft (edit) Previously Billed Statements**

Go to Statements. Click on the Billed Statements tab.

Select Statements to be redrafted. (selection boxes screen left).

(If you do not see client, you can search for the client name, client ID or Invoice number) Click Redraft Selected Statements. (screen right)

Click Prebill in response to popup question.

On Prebill Redraft Screen, select statement to redraft (Screen left). Select line item to redraft. (Main Screen). Change and Save.

Preview Statement. While the client is still selected, select appropriate Statement Date and Click Preview Statement. (Screen left, second and third buttons from the bottom).

To Rebill redrafted statement(s). Go to Statements. Click Pending Redrafts tab.

Click on statement to be rebilled. Click Rebill Selected Statement. (Screen top right, second button down). If you are rebilling more than same client, click on first statement and click "Redraft All for Selected Client". (Screen right, second button from bottom button).

## History Statements

Your Interbill program online database contains each of your separate client statements going back 20 years (if you have been with Interbill that long). You can access client statements individually or as one continuous statement (a complete history or you can choose which statement range dates to include).

### To access your client's History Statements:

Select Statements from the Main Menu.

Click on the History Statement tab. You will see a list of clients in Client name order.

Search for the client you are looking for by typing the name or client ID in the search space at the top of the page.

Once you have found the client, click on it to select (the selected row will be shaded blue).

Click View History Statement screen right to display statement. You can save or print the History once displayed just using the same methods you use to print and save regular statements.

Click Email History Statement to Email to your client. This email method is the same as you use with regular statements, it uses the email address from the Client Screen and pop-up an email screen which you can use to add a message and email the statement. Make sure your email is included in the BCC if you want a copy of the History Statement emailed to you.

Usually, you will want the entire client statement, but you can customize which date range of statements to include. To the right of First Statement, you can select the first statement to be included. To the right of Last Statement, you can select the Last Statement to be included. When you click View History Statement only those statements from the first statement date to the last statement date will be included in the history.

## Reports

Most of the following Reports can be opened, displayed and printed in PDF or Spreadsheet CSV format. CSV format can also be saved in Excel xlsx format. You can manipulate data in the spreadsheet format.

**Log Report:** Customizable Display of Billed and Unbilled Log Data for any period of time. Available in PDF and CSV formats. Extremely useful report for auditing any type of Log entry, Fees, Costs, Payments, Trusts, Retainers or Late Payment Charges. There are 3 types of Payments, recorded Payments, Trust and Retainer Transfers (money transferred from Trust and Retainer Accounts to pay statement charges).

**Invoice Report:** (This report is scheduled to be moved to History Statements and become Client History Statement by Activity Date): This History Statement is also available in CSV spreadsheet format. The regular History Statement displays all statements as a single statement within Statement date range. The Invoice Report (Client History by Activity Date) Allows you to display a History Statement using exact from and to log activity dates. You can also produce the report with Fees only or Costs only.

**Payment Report:** This report allows you to display and print all client payments including those from trust and retainer accounts. Unbilled as well as billed payments are included.

**Clients/Matters:** Several client reports are available for all Clients Active, Inactive or both Active and Inactive. Inactive clients are displayed in red. There is a Client Name/ID list with or without matters. A full client list in CSV with addresses, A CSV Client List with Telephone Numbers, A CSV Client List with Email Addresses and a CSV Client List with User Rates.

**Installment Billing Report:** List of the clients who are paying by installments and whether or not they are overdue.

**Trust/Retainer Balance Report:** CSV or PDF format, Active and/or Inactive Clients. Commonly used to reconcile Trust/Retainer Accounts. If used for that purpose be sure to include Inactive Clients (clients may have been deactivated since your last reconciliation). Also used to obtain the amount to transfer from Trust/Retainer Bank accounts to your General (Office) Account. For the Date Range selected or Cumulative, displays all clients with Trust/Retainer Beginning/Ending Balances and Totals of Deposits, Disbursements and Transfers (Money manually or Automatically Transferred from Trust/Retainers to pay for statement charges).

**The Transfers Report Total is the amount you need to transfer from your Trust/Retainer Bank Account to your General Account. A very, very important figure.**

**Trust/Retainer Activity Detail Report:** Use this report to view all Trust/Retainer Individual Entries (not just Balances and Totals) for a single client or for all clients by date range or cumulative from the beginning. If the latter expect to wait a while it could be hundreds of entries.

**Accounts Receivable Summary Report:** (What clients have a billed balance due, for how much and for how long): For Active and/or Inactive clients, overdue balances aged up to 120 days. with the last payment amount and date. This report, which is available in both PDF and CSV formats, can be displayed by Client Name, Client ID, Aged Balances, Balances Low to High, Balances High to Low, Date Last Paid and Credit Balances (only). The month and amount of the last payment is displayed for each client with an open balance.

**Accounts Receivable Detail Report:** For any date range, for all clients billed in the date range or for single clients a list of statements, statement charges, payments, Trust and Retainer Transfers and balance due.

**Unbilled Charges and Credits Report:** PDF Only. For Active and/or Inactive Clients. A listing of all clients with Unbilled (not yet billed) Fees and Cost charges with date last billed and aging of Unbilled. This report can be displayed by Client Name, Client ID, Aged Balances, Balances Low to High, Balances High to Low, Date Last Billed and Credit Balances.

**Productivity Report:** PDF and CSV formats. Active and Inactive Clients. For your selected date range, a summary by clients or by month of hours and fees charged to each client by each user with totals by user and office. Credits are separately totaled.



**Practice Area Report:** CSV only Active and Inactive Client, by Any Date Range, Client Name, Client ID, Hours, Fees, Costs, Late Charges and Payments within User created Practice Areas.

**Client To Date Financial Report:** CSV and Active Clients only, Client Name, Client ID, Open date and Totals of each possible entry type including Trusts and Retainers (deposits, disbursements and manual/automatic transfers to pay statement charges). Includes any unbilled or unpaid balance.

**Client Selected Date Range Financial Report:** CSV and Active Clients and/or Inactive clients; Client name, Client ID, Open date and Totals of each possible entry type including Trusts and Retainers (deposits, disbursements and manual/automatic transfers to pay statement charges).

**Year to Date/Month to Date Office Summary:** Total Clients by status; Summaries of Charges, Payments, Trusts and Retainer for any date range. Also included totals of Aged Receivables and Aged Unbilled.

**Office Summary Date Range Report:** Total Clients by status; Summaries of Charges, Billings, Payments, Trusts and Retainer for any date range. Also included totals of Aged Receivables and Aged Unbilled.

### **Users and Roles:**

There is no limit to the number of users.

There are currently three types of Users with five defined roles.

**Administrator** has total access to all system screens and functions.

**User4** has same access as Administrator minus management reports. User4 does have access to Billing Reports which are Log Reports, Accounts Receivables Summary and Detail Financial Reports but not Productivity, Practice Area or Office Summary Reports.

**User3** has same access as User4 but no access to Reports.

**User2** has same access as User3 but no access to Clients Screen.

**User** has access limited to the Log and Prebill and only for their own entries.

**User1** access is limited to the Log Hours. No fees are displayed.

**To Activate, Deactivate, Reactivate and Edit Users:** Go to the Settings screen to Office Settings (the default). The User Screen is the left panel of the screen.

**To Activate a User:** Click the New button top of the Active tab and fill out the popup screen with Username, User Password, User Default Hourly Rate and Initials. Select the Users role, Admin, User, User1 and User2. **Save.**

**To Edit a User:** Click the Edit button top of the Active tab, select the User and make your Edits on the popup screen. If you are changing the Users default hourly rate you will be asked if you want to change for all pre-existing clients and then if you want to recompute user unbilled entries times the new hourly rate for the user. You can change User Hourly Rates for only new clients by responding "NO" to the first Popup screen. **Save.**

**To Deactivate a User:** Select the User and click the Deactivate button top of the Active Panel. **Save.**

**To Reactivate a User:** You can reactivate the user at any time by selecting the Inactive tab, select the user and click the Reactivate button. **Save.** **Special Settings Functions:**

**Change wording for Payment, Retainer and Trust Transactions.** Go to Settings to Default Descriptions. Change the wording to what you want and save.

**Move or copy data from one client/matter to another.** Go to Settings to Log Settings. To Move or Copy enter From Client and to Client and date range of data to be moved or copies. Press move or copy.

**Special Agreement Hours.** This is the ability to charge a special rate or a flat rate for all entries within a specified number of hours. Go to Settings to Log Settings, to Special Agreement Hours, select client enter Special Hourly Rate or Flat Rate

**(Spell check) Dictionary Options:** Go to Settings to Log Settings and to Dictionary Options. Press Options and make changes. Use Edit Custom Dictionary to remove, change or add words to the customer dictionary.

End of Handbook