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 spellchecked entries in the Logs you can Spellcheck them at this time.

End Prebill