



Practice Management

November 2020

Timesheets and Time Setup

Approve a Timesheet:

1. Navigate to **Billing** via the icon on left panel.
2. Click on **Timesheets** in the ribbon.
3. Find that user that you wish to view the timesheet of and click the **Open** icon.
4. The icons at the end of each row allow you to change a timesheet by clicking **Edit**, **Remind** a user to submit their timesheet, **View** or **Approve** a timesheet
5. If you click on **View**, a window will display a summary of submissions for a user. View history, add a note or edit
6. Click **Mark HR Approved** to approve the timesheet or click **Undo Submission** to reject the current timesheet and allow the user to make changes.
7. Note the **Reports** available to you from this window

Add a Rate Band

1. Go to **Time Setup** then **Rate Bands**
2. Add a new entry and enter the name and sub bands and rates per unit then click on **Save**

Assign a Rate Band to a Staff Member:

1. Click on **Time Setup** in the ribbon.
2. Click on **Staff Rate Bands**.
3. Find the user whose rate band you wish to change and click **Change** for that user
4. Select the new rate from the dropdown list and click **Save** to submit the changes

Change a Staff Member's Working Hours

1. Click on **Time Setup** in the ribbon.
2. Click **Staff Working Hours**
3. Find the user who's working hours you wish to change and click **Change** for that user.
4. Amend the **Hours** to the correct amount, select the **date** that these changes should take effect, and click **Save** to commit the changes.

The screenshot shows the software interface with the following elements:

- Billing** ribbon with a clock icon.
- Timesheets** ribbon (highlighted with a red box).
- Action icons for timesheets: **REMIND user to submit timesheet** (speech bubble), **VIEW submitted timesheet** (eye), **EDIT a Timesheet** (pencil), and **APPROVE a Timesheet** (checkmark).
- Time Setup** ribbon (highlighted with a red box).
- Rate Bands** window showing a table with columns: Sub Band Name, Unit Rate, Hourly.

Sub Band Name	Unit Rate	Hourly
High Rate	150.00	600.00
Medium	100.00	0.00

- Staff Rate Bands** window showing a table with columns: Staff Rate Bands, Staff, Change.

er19	Staff	Change
Demo User2	Staff	Change
Demo User20	Staff	Change

- Staff Working Hours** window showing a form with fields: Hours (35.00), Effective from (26/04/2019), and a calendar icon.

Fee Setup

Set Up a New Fee Type:

1. Click on **Billing** icon then on **Fee Setup** in the ribbon.
2. Click on **Fee Types**.
3. Click **Add New** to set up a new fee type.
4. Complete the details for the new fee type
5. Click **Save** to complete it.

Set Up a Recurring Fixed Fee for a Client:

1. Click **Recurring Fees**.
2. Click **Add New** to set up a new recurring fee.
3. Enter the details of the recurring fee that you are creating.
4. Choose a Schedule from the dropdown list or click **Create New Schedule** to set a new schedule up.
5. Check the dates include the initial period if relevant
6. Enter the remaining details and click **Save**.

Edit and Stop a Recurring Fee:

1. Click **Edit** to edit a recurring fee.
2. If you want to change the amount or the dates for the recurring fee, click the toggle.
3. Click **Save** to keep your changes.
4. Click the **Delete** icon to stop a recurring fee.

Set Up a Fee Charging Preference for a Client:

1. Click **Fee Preferences**.
2. Click **Add New**.
3. Choose the entity, who will be invoiced and pay
4. The email that will receive the invoice
5. Choose the layout of the time on the invoice
6. Select the payment method
7. If bookkeeping, make sure you toggle the option
8. Click **Save**.

The screenshot illustrates the 'Fee Setup' workflow in the software. It shows three main panels:

- Fee Types Panel:** Displays a list of fee types. The 'New fee type' form is visible, showing fields for 'Fee type', 'Is Billable*' (checked), 'Description*' (Training), and 'Default Narrative'.
- Recurring Fees Panel:** Shows a list of recurring fees. The 'New recurring flat fee' form is visible, showing fields for 'Type' (Management & Administration Fee), 'Description' (Management & Administration Fee), and 'Annualised Amount' (GBP, 10000).
- Fee Preferences Panel:** Shows the 'Fee Preferences' form for a client. It includes fields for 'Entity Invoiced' and 'Paying Entity' (both set to Beechwood Limited), 'Invoice Email Template' (Link document), and 'Email address'.

Raising an Invoice

View WIP:

1. Navigate to the **Entities** area.
2. Open the entity that you want to view WIP for.
3. Click on **Billing** in the ribbon.
4. Click on **Work in Progress**.

Add a Disbursement:

1. Click **Disbursement**.
2. Enter the details of the disbursement you wish to raise.

Add a One-Off Fee:

1. Click **Fee**.
2. Enter the details of the one-off fee you wish to raise.

Raise an Invoice:

1. Click **Raise Invoice**.
2. Select your dates and which types of items you wish to charge and click Next.
3. Deselect any WIP entries that you don't want to include in the invoice and click Next.
4. You can add a fee or disbursement to the invoice by clicking the **Add Fee** and **Add Disbursement** links. Once you have added any additional fees, click Next.
5. You can now view both the client and internal summary of the invoice. Click Next to create the invoice.

Issue a Credit Note against an Invoice:

1. Click **Invoices**.
2. Click the **Issue Credit Note** link on the invoice that you wish to issue a credit note against.
3. You can either credit the entire invoice or enter new line item values and click save to issue the credit note.

Void an Invoice

1. Click **Invoices**.
2. Click the lines icon to view the invoice details
3. Click on the **Void** option in this window
4. Enter a reason and click OK

Finalise WIP:

1. Go to **Billing** icon then **WIP**
2. For any authorised time that is pending approval in the WIP window, click the ellipsis ... to view the individual time records.
3. From here, you can write-off, approve, and edit any entry.
4. You can **Send for Approval** and **Finalise WIP** here

The screenshot shows a software interface for managing work in progress (WIP). At the top, there is a navigation bar with a dark blue background. On the left, there is a 'Entities' button with a person icon. On the right, there is a 'Fee Setup' button with a blue background and white text, which is highlighted with a red rectangular box. Below the navigation bar, there is a main content area with several buttons and options. The first row contains a 'Work In Progress' button with a calendar icon. The second row contains a 'Disbursement' button with a document icon. The third row contains a 'Fee' button with a document icon. Below these buttons, there is a 'Raise Invoice' button with a paper plane icon. To the right of the 'Raise Invoice' button, there are three checkboxes: 'Time' (checked), 'Fees' (checked), and 'Disbursements' (checked). Below the 'Raise Invoice' button, there are two buttons: 'Add Fee' and 'Add Disbursement'. Below these buttons, there is an 'Invoices' button with a document icon. Below the 'Invoices' button, there is an 'Issue Credit Note' button. Below the 'Issue Credit Note' button, there is a 'Void' button with a circular arrow icon. At the bottom of the interface, there are five buttons: 'Write off', 'Pending', 'Approve', 'Send for Approval', and 'Finalise WIP'. The 'Send for Approval' button has a hand icon, and the 'Finalise WIP' button has a checkmark icon.