PLAINSAIL

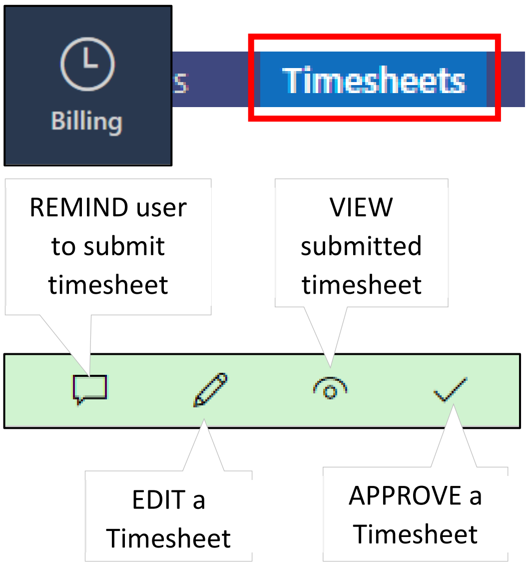
Practice Management

November 2020

Timesheets and Time Setup

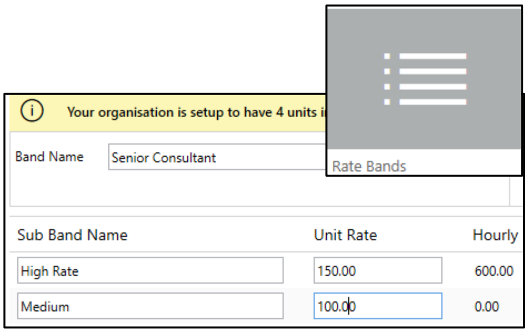
<u>Approve a Timesheet:</u>

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



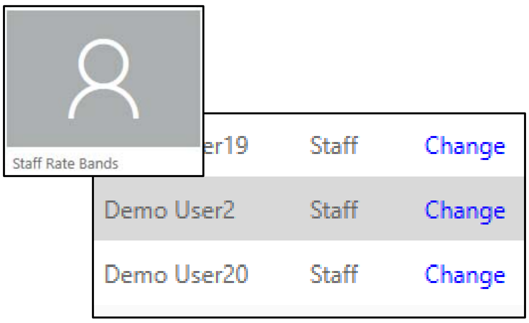
<u>Add a Rate Band</u>

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**



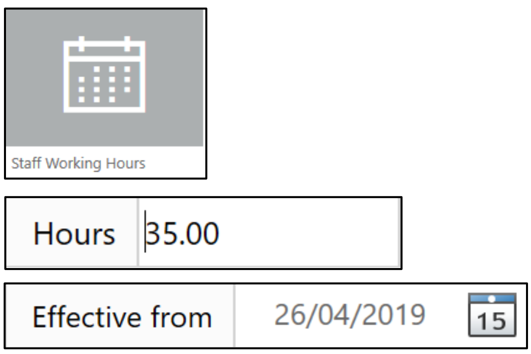
<u>Assign a Rate Band to a Staff Member:</u>

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



<u>Change a Staff Member's Working Hours</u>

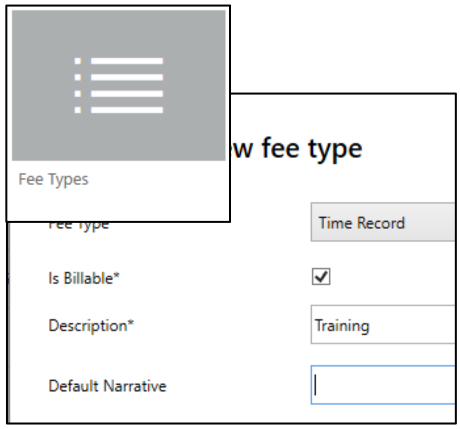
1. Click on **Time Setup** in the ribbon.
2. Click **Staff Working Hours**
3. Find the user who's working hours you wish to change and click **Change** for that user.
4. Amend the **Hours** to the correct amount, select the **date** that these changes should take effected, and click **Save** to commit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



Fee Setup

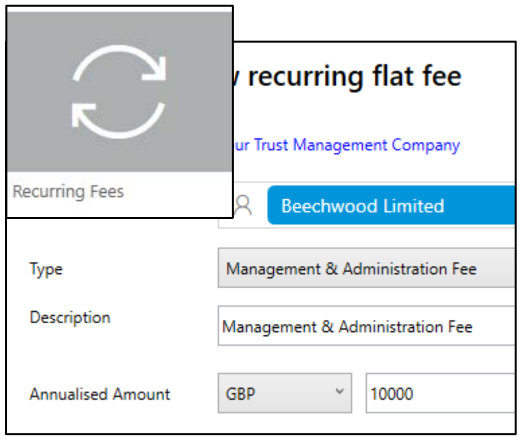
Set Up a New Fee Type:

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**.

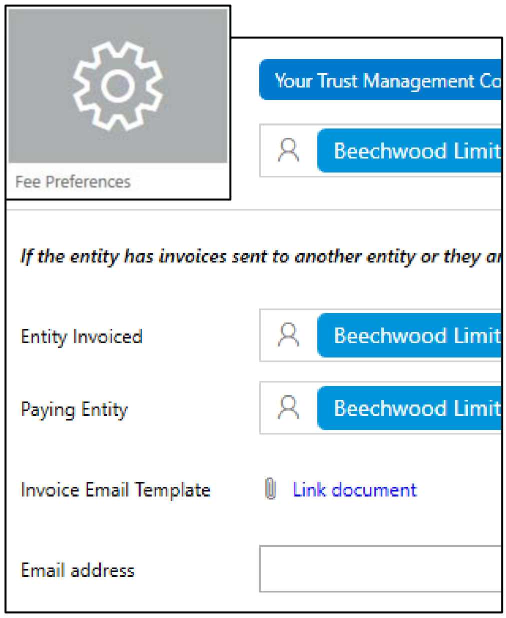


Edit and Stop a Recurring Fee:

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**.



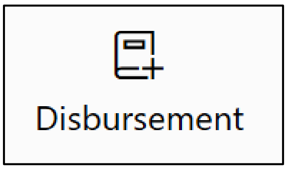
Raising an Invoice

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**.

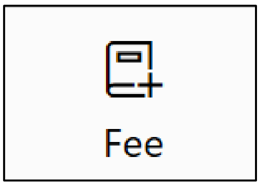
Add a Disbursement:

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



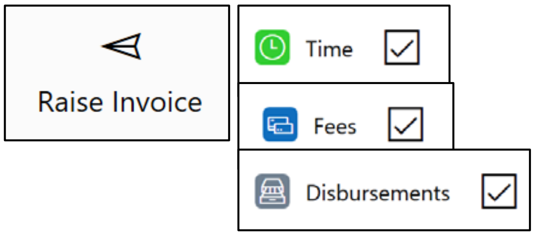
Add a One-Off Fee:

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



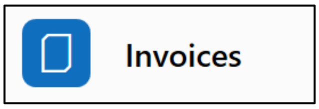
Raise an Invoice:

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.



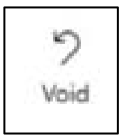
Issue a Credit Note against an Invoice:

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