

Billing Matters 8.0

Billing Matters back-office capabilities include advanced billing, full accounts payable and receivable, comprehensive trust accounting, a flexible general ledger, world-class check writing and reconciliation and more. Firms that need basic billing can generate a bill and post a payment in one easy step. Advanced billing options include split, flat, consolidated and allocated fee arrangements. Accounting functions can be set for simple bookkeeping with lots of flexibility or can be completely locked down to maintain tight control.

With Billing Matters 8.0, you can streamline your internal billing process, simplify the handling of recurring payables, print invoices and checks more easily, better manage client billing and trust activity, increase accountability, avoid data losses and view billing information your way.

Key New Features

+ Streamline your internal billing process

Customize pre-bill layouts to show exactly the data your staff needs to review and approve invoices. Include or exclude "Do Not Bill" items as desired. You can also automatically e-mail invoices or save them as documents to your contact or matter records.

+ Simplify the handling of recurring payables

Save time and increase accuracy by entering payables such as rent, loan payments and partner cash payouts as "recurring." Enter a payable once and never have to worry about missing a payment.

+ Print invoices and checks more easily

Assign Microsoft® Windows® printer trays to make document, invoice and check generation virtually effortless.

+ Better manage client billing and trust activity

Gain greater insight on your financial activity. Beyond the 50 billing and accounting reports previously available, today's options include a client ledger report allocated by fees, expenses, interest and tax; a billing history report, commonly required by the courts; and an account register



With Billing Matters, you can manage your firm's billing, budgeting and accounting activities from a central desktop location.

report with running balances. And you can choose to see both posted and unposted transactions on your general ledger report—or choose just posted transactions.

Simplify trust account management. Use the matter-to-matter fund transaction type to move money between accounts for your clients. And keep fund balances from going negative with transaction restrictions.

+ Increase accountability

Log transaction details in a master audit log. Use this information for audits, fraud detection or internal process evaluation. Also gain the option to improve recordkeeping by making staff and bill code required fields on your billing item record.

+ Avoid data losses

Enable system warnings and require users to contact Technical Support to migrate between cash and accrual accounting—this prevents users from losing data while trying to make an adjustment.

+ View billing information your way

View calendars that show billable hours by day. Choose from billing "power views" with summary billed and unbilled statistics.