Bill a matter

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Billing picks up the time you've recorded on a matter and anything you've paid out for the client. You choose what goes on each bill, check it, and issue it as a PDF on your letterhead.

Before you start
An admin switches on the **Billing** pack, and **Time** too if you bill by the hour. See Switch on a pack .

1 Set your numbers and rates

Go to **Settings** › **Bills and rates**

An admin builds the **Bill numbers** from pieces, like INV, the year and a four-digit number, and chooses whether they **Start again from 1** each year. **Payment reference** is what clients put on a bank transfer. Under **VAT**, turn off **VAT registered** if your firm isn't, or fill in the **VAT rate**, **VAT number** and **Tax point**. Then fill in **Payment due after**, **How to pay** and how you **Usually send bills by**.

Under **Hourly rates**, set the rate for **Anyone without a grade**, press **Add a grade** for each grade you charge, and choose **Who is on which grade**. Press **Save** when you're done.

2 Design your bills

Go to **Settings** › **Bill templates**

Press **New template**. Under **Look**, pick a layout, what to **Call it**, the **Letterhead**, fonts, **Text size** and **Accent colour**; the preview beside it shows one of your recent bills as it will look. **Wording** holds the text **Above the lines** and **At the foot**, and **Email** the message the bill goes with. Under **Used for**, choose the work streams it's for, or make it the default. Press **Save**.

Your first template becomes the default. A matter uses the template for its work stream, and the default otherwise.

3 Say how the matter is charged

Go to **Matters**

Open the matter and choose **Billing**. Under **How it's charged**, pick **Hourly, at the rates**, **A fixed fee** or **Hourly, up to a cap**, and press **Save**.

Under **Rates on this matter** you can agree a different rate for a grade. Leave one empty for your usual rate.

4 Start a bill

Under **Waiting to be billed**, tick the time and disbursements to include and press **Start a bill**.

To add something you paid out, fill in **Date paid**, the **Amount** before VAT, **What it was for** and the

VAT under **Disbursements**, then press **Add disbursement**.

5 Check the draft

Change any amount, untick a line to leave it off, add a fee, and write **What the bill is for**. Pick a different **Template** if this bill needs one, and turn on **Outside the scope of UK VAT** for a client abroad. Press **Save**, then **Preview the PDF** to see it as the client will.

6 Issue and send it

Press **Issue** and choose the day it's **Dated**. Turn on **By email**, **By post** or **In the client portal**; each is filled in from the client and the matter, and you can change anything before it goes. Press **Issue and send**. It takes the next bill number, and every time it goes out is listed under **Sent** on the bill.

Press **Send** on an issued bill to send it again another way, or **Download the PDF** to send it yourself.

7 Record a payment

When the client pays, fill in **Received**, the **Amount** and **How it came in** under **Record a payment**, and press **Record payment**.

From the same bill you can **Issue credit note** to take something off, or **Send reminder** to email the client with the bill attached.

8 See what's owed

Go to **Bills**

Owed lists every bill still to be paid, and **Drafts** the ones not yet issued. Choose the days and download bills, payments or credit notes as CSV for your accounts.

If something goes wrong

Nothing shows under Waiting to be billed.
Only chargeable time and disbursements not on another bill show there. Check the time was recorded as **Chargeable** on this matter.

You need to change a bill that's been issued.
An issued bill can't change. Issue a credit note against it, then start a new bill.