

TimeNet Law



Product Manual

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Features and Terminology

TimeNet Law is an easy to use time/billing, accounting and reporting software suite for law firms, private investigators, and any others who bill similarly. Solo practitioner, small (2-5), medium (6-30) or larger (30+) firms can all easily jump into TimeNet Law.

Main Features

- * Built Exclusively for Mac
- * Integrates with Apple Contacts and Calendar
- * Fully Networkable (LAN, WAN or Cloud)
- * Incredibly Easy to Learn
- * Contingency billing, Split Billing, Joint Billing, UTBMS and LEDES98B Billing
- * Conflict of Interest Checking
- * Over a 18 Powerful Reports, Beautifully Designed to Send Straight to Your Client or Bank
- * Trust, Escrow and Unapplied Credits (Retainer) Accounts - Client and Matter Level
- * One Click Billing with Automatic Bookkeeper
- * Automatic Bookkeeper automatically applies funds from accounts to invoices
- * Customizable Invoice Layout
- * Foreign currency support
- * Time Entry and Display in Tenths or H:MM:SS
- * Customizable Time Rounding (round to 6, 10, 15, 30, 60 minutes with automatic rounding)
- * Payment Center allows for complete control over how payments and credits are applied
 - * Transfer funds from one account to another
 - * Track everything about credits and payments (Type, Check/Wire No, who it was from, etc)
 - * Differentiate between deposits, payments, discounts, mark downs and write offs
 - * Billing Center shows at-a-glance information for all of your clients
 - * Quickly see the balance and required replenishment of all clients
 - * See all Work in Progress and generate batches of invoices instantly
 - * See all invoices and how much is owed, cancel invoices or apply payments to them
- * Auto-Save and Auto-Backup ensure no data is ever lost
- * Matter Groups and Client Groups for Billing and Reporting
- * Print Client Address Labels Function or Customize Invoice/Report Layout for Use With Any Window Envelopes
- * Ability to set user permissions, plus a full auditing trail
- * Accounts feature lets you keep track of internal and operating accounts, with complete Ledger Reports

Features and Terminology (continued)

Terminology

Matter

Matters are like filing cabinets that collect time records, expenses, notes and files. Matters also have fund accounts, and can have custom settings for billing rates, time rounding, budgets, contingent billing and more.

Timekeeper

Hourly charges are calculated using Timekeepers. Each Timekeeper has one or more hourly billing rates. Each billing rate can have a custom label, such as “Discount” or “Rush.”

QuickTimer

This is a window that immediately begins tracking time and allows you to enter the task details into a text field. You can pause and resume the timer, and when you’re finished with the task, it can be easily added to a Client’s Matter.

Slip

A Slip is an item added to a Matter. There are four types of Slips.

Timekeeper Slip • Timekeeper Slips are used to keep track of hourly work and will be shown on invoices (unless the Slip’s Billing Type is For My Eyes Only). Timekeeper Slip amounts are categorized as Fees.

Flat Fee Slip • Flat Fee Slips are flat rate items added to a Matter. It is recommended that you use Flat Fee Slips for tasks that you perform commonly at a set rate (for example delivery/copy charges, filling fees, etc.). Flat Fee Slip amounts are categorized as Fees.

Additional Charge Slip • Additional Charge Slips are custom charges that can be added to Matters. It is recommended that you use Additional Charge Slips to track variable expenses such as travel, meals and other costs that are to be billed to your client. Additional Charge Slip amounts are categorized as Disbursements.

Discount Slip • Discount Slips are used to apply a discount to an invoice. Discount Slips can be either a flat value (for example \$100 off) or a percentage (for example 5% off). Percentage discounts will only affect the Slip type(s) that are selected when adding the Discount Slip.

Quick Entry

Quick Entry is an editable list of task names and minute/dollar amounts that can be added to Matters either via Timekeeper Slips or Additional Charge Slips. Timekeeper Slips will set the time field to the Minutes preset (if any) automatically, and Additional Charges will use the Amount preset. You may also leave the amount field blank to require it be entered specifically each time.

Features and Terminology (continued)

Text Substitution

Text Substitution is a powerful abbreviation system that can dramatically increase productivity and decrease typing time. Create as many Text Substitutions as you want. For example, make “pcw” fill out to “phone call with” anywhere within TimeNet Law.

Fees

Fees is the amount of Timekeeper Slips + Flat Fee Slips.

Expenses

Disbursements is the amount of Additional Charge Slips.

Mark Downs

Mark Downs are dollar amount reductions made to slips **prior to invoicing**. A Mark Down is categorized as a **credit**.

Write Offs

Write Offs are dollar amount reductions made to invoices **after invoicing**. They are applied and shown similarly to payments. A Write Off is categorized as a **credit**.

Work in Progress/WIP

Slips that have not been billed yet. Any unbilled slip is categorized as WIP.

Billed

A slip becomes billed when it is attached to an invoice.

Unapplied Credits

This is a general retainer account.

Client Code

When entering clients into TimeNet Law, you will give those clients unique Client Codes. This Client Code will prefix Invoice and Matter Numbers and be used to identify clients in certain reports.

Net Investment

The Net Investment Report shows the Net Investment of a client. This investment is calculated by adding all billed and unbilled fees & expenses, then subtracting all payments and credits. This shows you how much money is currently invested in that client.

Features and Terminology (continued)

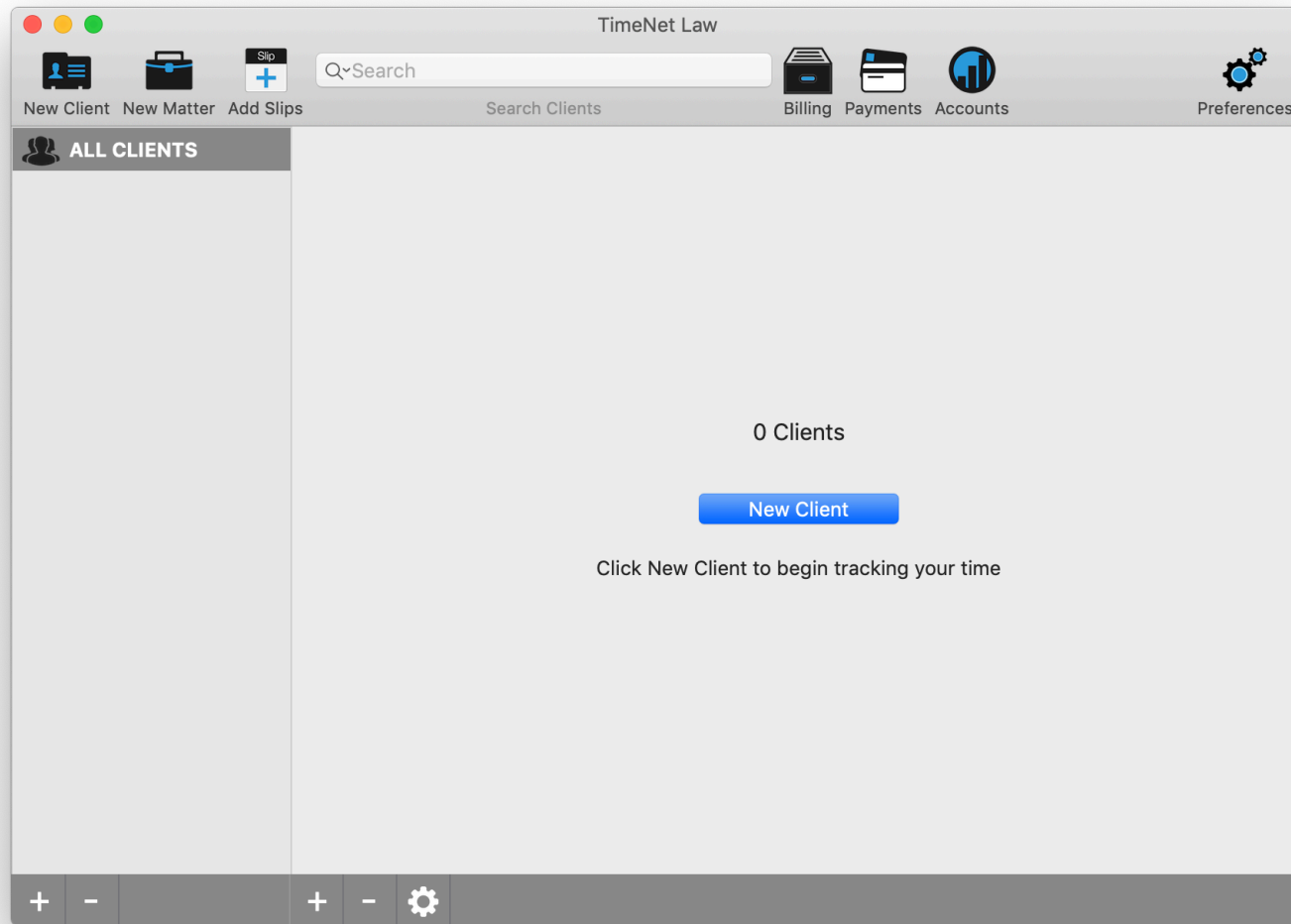
Automatic Bookkeeper/ABK

The Automatic Bookkeeper will automatically apply funds from retainer accounts to the balance of invoices. The ABK can be configured to apply payments automatically to invoices as they are generated, or it can be run as a batch manually.

Billable/Non-Billable/For My Eyes Only

Every Slip entered into TimeNet Law can be either Billable, or Non-Billable. No Charge and For My Eyes Only are both non-billable, but *For My Eyes Only slips will not appear on the invoice.*

Getting Familiar - The Main Window




TimeNet Law's Main Window

When you first open TimeNet Law, you will be presented with the Setup Assistant. Read the information presented and follow the instructions to get started. Once you've completed setup, you can configure additional settings and make changes at any time in Preferences.

Getting Familiar (continued)

Welcome to TimeNet Law!



First, please enter a few details about your law firm.
By default, this information will be shown on invoices.

<input type="text" value="Law Firm"/>	
<input type="text" value="Address"/>	<input type="text" value="City"/>
<input type="text" value="State"/>	<input type="text" value="Zip"/>
<input type="text" value="Phone Number"/>	<input type="text" value="Email Address"/>

Exit Setup 1 of 4 Next

Once you've completed the Setup Assistant, you will see that there are 0 Clients in the system. Your first step to tracking or entering your time is to create a client. Use the New Client button in the toolbar, select File > New Client, or click the New Client button in the center of the window to create a client. See the **Adding Clients** section for more info.

Main Window Toolbar

New Client

Use the New Client toolbar button to add clients into TimeNet Law. See the **Adding Clients** section for more info.

New Matter

Use the New Matter button to create new Matters. You must first have created at least one client. See the **Matter** section for more info.

Add Slips

This opens the Add Slips window, allowing you to create and add slips to multiple clients and matters quickly from one window, rather than opening each matter first to add slips. See the **Adding Slips Quickly** section for more info.

Search Clients

Use the Search Clients field to filter your list of clients. Searching also includes all parties and the ATTN field in Client Settings.

Getting Familiar (continued)

Billing

Use the Billing button to open the Billing Center. Here you can view client balances, generate statements, use One Click Billing, view and cancel existing invoices, and run the Automatic Bookkeeper. See the **Billing Center** section for more info.

Payments

The Payment Center is where you add or delete retainer deposits and payments/write offs applied to invoices. See the **Payment Center** section for more info.

Accounts

The Accounts section allows you to keep track of internal accounts, categorize expenses and revenue by category, and create Ledger Reports. See the **Accounts** section for more info.

Preferences

Visiting TimeNet Law's Preferences should be the first thing you do. The Preferences window is where you setup your basic preferences, establish your identity for outgoing invoices, set billing preferences, create Timekeepers, and many other options. For more info, see the **Preferences** section.

Bottom Row Action Buttons

Use the + and - buttons to add clients or matters. The Action button  shows you a menu of options about the client or matter you have selected. It functions the same as a right-click or control+click.

If a conflict of interest is found, a red Conflict Badge will also appear in this bar at the bottom of the screen. See the **Conflict of Interest Checking & Parties** section.

Getting Familiar (continued)

Main Window Tips and Shortcuts

Edit an existing client

Hold the Option key and double-click on a client or hold Option and press return with a client selected.

Networked or Local mode

The titlebar of the main window will show (Networked) if you are running in Networked mode. For more info, see the **Networking** section.

Show Inactive clients and matters.

Select View > Show Inactive Clients or View > Show Inactive Matters from the menubar.

See other information from the main window by turning on extra columns.

Select the View menu to see a list of other columns you can turn on, including Date of Last Activity, Matter Group, Retainers, and more.

Quickly navigate clients and matters with the keyboard

- * The up and down arrow keys move through the list.
- * The left and right arrow keys, as well as the return key, will expand/collapse the selected client's matter list.
- * The return key will open the selected matter.
- * Begin typing a client or matter name to select it automatically.

Payment Center shortcut

Select a client or a matter before clicking the Payments button to automatically load that client or matter in the Payment Center.

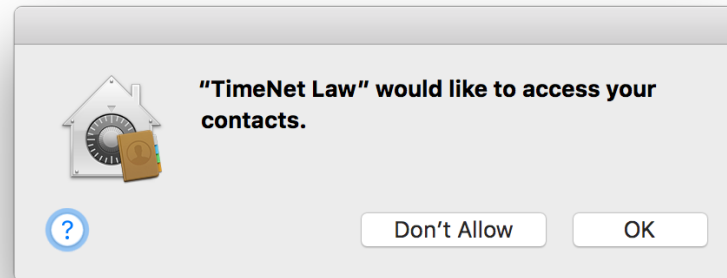
Quickly view a client's Trust, Escrow, or Retainer account

Right-click (or Control+click) on the client's name and select the account from the popup menu. You can also bring up this menu by clicking the Action button in the bottom-left:



A Word About Privacy

The first time you open TimeNet Law's Preferences or create a client, you will be notified that TimeNet Law would like access to your contacts.



This is to allow you to easily import existing clients from your Mac or iPhone Contacts list into TimeNet Law. This information is temporarily accessed by TimeNet Law only when the task is being performed. Everything happens locally on that computer — your information **is never sent to anyone, and we never see it.**

TimeNet Law will also ask you for access to your Calendar if you use the Import Events from Calendar option to turn Calendar events into billable slips. Again, this information is temporarily accessed locally on your computer so that TimeNet Law can import your events. Your information **is never sent to anyone, and we never see it.**

You can grant or revoke TimeNet Law's access to your contacts or calendars at any time. To do so:

1. Select **Apple** > System Preferences from the menubar
2. Click Security & Privacy in the first row
3. Click the Privacy tab
4. Select Contacts in the lefthand list. Scroll down the list of applications on the right until you find TimeNet Law.
5. Check or uncheck TimeNet Law to allow or disallow access to your contacts.

Repeat steps 4 and 5, but select Calendars in the lefthand list, to allow or disallow TimeNet Law's access to your calendar.

Preferences

Click the Preferences button at the far right of the toolbar in the Main Window, or select TimeNet Law > Preferences from the menubar to access TimeNet Law's Preferences.

The screenshot shows the 'Preferences - Identity' window. At the top, there are five tabs: 'Identity' (selected), 'General', 'Billing', 'Timekeepers & Rates', and 'Invoices'. Below the tabs, there are two buttons: 'Logo Header' (highlighted in blue) and 'Text Header'. A large gray box in the center contains the text 'Click Here to Select a Logo Header' and 'Supports PNG, JPG and GIF'. Below this box, it says 'Drag your logo into the box above.' followed by an 'Align:' dropdown menu set to 'Center' and a close button 'X'. The 'Law Firm Details' section contains a grid of text input fields for 'Law Firm Name', 'Phone Number', 'Address 1', 'Mobile Number', 'Address 2', 'Email Address', 'City', 'Website Address', 'State', 'Law Firm ID (for LEDES)', and 'Zip Code'. Below the grid, it says 'Law Firm ID is for LEDES E-Billing'. The 'Identity & Text Header Font' section at the bottom includes bold, italic, and underline buttons, a font family dropdown set to 'Helvetica', a text alignment dropdown set to 'Left', and a font size dropdown set to '11'.

TimeNet Law's Preferences Window

The Preferences Window (continued)

Setting Up Your Identity and Logo

Establish your law firm's name and contact information here. These fields will be shown on invoices that TimeNet Law creates (further invoice customizations can be made under the Invoices pane).

If you want a logo to appear at the top of your invoices, drag an image file onto the grey image box or simply click on it to choose a file. You can set the alignment of the image, or remove the image with the **X** button below the image.

Logo headers can be in **JPG, PNG, or GIF** format. For best results, **use 150 or 300 dpi**. TimeNet Law will automatically resize your image if its too big to fit on the invoice properly.

If you'd rather just have a text letterhead, click the "Textual Letterhead" option. Note that if you have any text entered into the Textual Letterhead field, TimeNet Law will not show a logo at the top of your invoices.

All headers and footers support **HTML tags**.

To make a line bigger:

`This line is bigger, size 15`

To make a line or word bold, place a `` tag immediately before what is to be bold, and a `` tag immediately after:

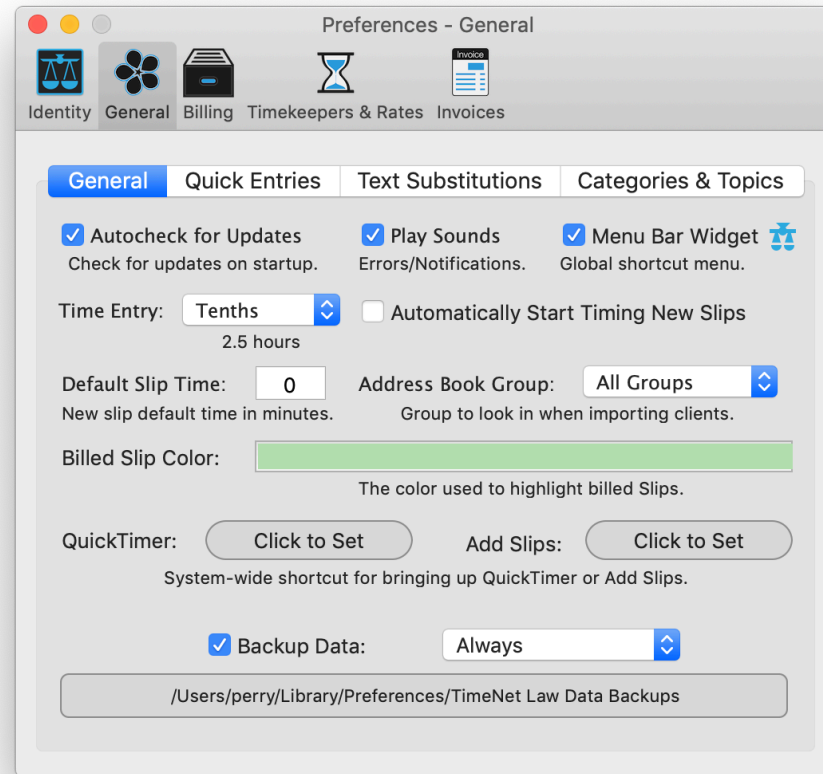
`This line will be bold`

You can also combine tags. This makes the text bigger **and** bold:

`This line is bigger, size 15, and bold`

The Preferences Window (continued)

General Preferences > General Tab



Autocheck for Updates

When enabled, TimeNet Law will check to see if a new version is available whenever you launch the program.

Play Sounds

When enabled, TimeNet Law will play sounds when a message dialog appears, or when One Click Billing finishes.

Menu Bar Widget

Shows the TimeNet Law icon on the righthand side of your menubar. This can be accessed from any application and gives you handy shortcuts for timers and other features.

General Preferences > General Tab (continued)

Time Entry

You can enter your time in tenths (for example, 1.5 hours for 1 hour and 30 minutes), or in hours : minutes : seconds (for example, 1:30:00 for 1 hour and 30 minutes). Select your preference by choosing “Tenths” or “h:mm:ss”.

Automatically Start Timing New Slips

When enabled, new slips will begin timing immediately from the time they are created.

Default Slip Time

When creating a new slip, by default the time on that slip is set to 0.0. If you’d like new slips to automatically be set to a specific amount, enter that amount in the field **in minutes**. For example, enter “6” to have all new slips default to 6 minutes.

Address Book Group

When creating new clients, TimeNet Law will show you a list of your contacts from your Mac and iPhone’s Contacts list, so that you can select one and import all of their contact information into the program. If you only want to pick from one specific group of contacts, select that group here.

Billed Slip Color

Slips in TimeNet Law are either “Billed” or “Unbilled” (also known as Work in Progress, or WIP). When slips are billed, they will be highlighted with a different color to indicate they have been billed and are no longer active/editable. Select the color to use here. **You can also choose to simply hide billed slips. This is a matter-specific setting.**

QuickTimer Shortcut

A new QuickTimer can be created at any time, from any application, by using the Menu Bar Widget icon, or using the shortcut that you set here. The symbols are Shift, Control, Option, and Command. You can hover over each checkbox to see what that symbol means.

Backup Data

TimeNet Law is compatible with Time Machine and other backup systems out of the box. It is also recommended to have a second redundant backup, which TimeNet Law can perform automatically. Enable this option, and select the frequency of backups. You can also customize where backups are saved by clicking the path button just below the Backup Data checkbox.

Always backs up every time you quit the program. Recommended.

Once a Day backs up once a day when you quit the program.

Once a Week backs up once a week when you quit the program.

The trigger for TimeNet Law’s Automatic Backup function is quitting the program. If you plan to leave TimeNet Law open all the time, **it is still recommended to quit and reopen the program every 1-2 days to keep things running smoothly.**

The Preferences Window (continued)

General Preferences > Quick Entries Tab

Quick Entries are a list of common tasks that will be entered into TimeNet Law. When creating new slips, the program will auto-complete as you type, or you can use the popup menu next to the task field to select from your Quick Entries list. This makes data entry much faster.

By default, this list comes populated with basic entries. You can add or delete entries here. The Amount column can also be customized, but will only be used for Additional Charge (expense) slips. It will be ignored by Timekeeper (timed) slips, as the rate and time dictate the amount of Timekeeper slips.

Remember Slips I Create

Enabled this option to have TimeNet Law automatically add any new entries created to your Quick Entries list.

General Preferences > Text Substitutions Tab

Text Substitutions is another terrific feature that makes data entry lightning fast in TimeNet Law. Create a list of abbreviations that, when typed, turn into the full text. For example, “pcw” can expand to “Phone call with”, or “mwc” can expand to “Meeting with client”.

General Preferences > Categories & Topics Tab

Categories

TimeNet Law lets you assign your clients into categories. For example, you can keep multiple offices separated, or clients in other states/countries can be grouped together, etc. Reports and billing can be limited to a specific category.

Categories also allow you to use a custom invoice logo, header, and footer on invoices. This enables different categories of clients to receive invoices with different, customized information.

Slip Topics

Slip Topics can be customized for each matter. The list in Preferences is your Default Slip Topics list. This list will be applied to new matters as you create them.

Slip Topics let you assign a Topic to each slip. When creating invoices from slips with Slip Topics, the slips will be separated and grouped by Slip Topic, with subtotals shown for each Topic on the invoice.

The Preferences Window (continued)

Billing Preferences > Options Tab

The screenshot shows the 'Preferences - Billing' window with the 'Options' tab selected. The window has a title bar with standard macOS window controls (red, yellow, green buttons). Below the title bar is a tab bar with five tabs: 'Identity', 'General', 'Billing' (selected), 'Timekeepers & Rates', and 'Invoices'. Each tab has a corresponding icon. The 'Options' tab contains several settings:

- Round Time:** A dropdown menu set to '6 Minutes' and a checked checkbox for 'Smart Rounding' with a refresh icon. Below this is the text: 'Your preference for rounding time. Automatically round time when pausing timers.'
- After Idle for:** A dropdown menu set to '0 Minutes' and another dropdown menu set to 'Do Nothing'. Below this is the text: 'What to do if the computer goes idle while timing.'
- Allow Multiple Timers:** An unchecked checkbox. Below it is the text: 'Allow multiple timers to run at the same time.'
- Currency:** A dropdown menu set to '\$'. Below it is the text: 'Your local currency format.'
- Overdue After:** A dropdown menu set to '30 days'.
- Late Fee:** A dropdown menu set to '0 %'.
- Label:** A text field containing 'Late Fee'. Below it is the text: 'Late Fee label on invoices.'
- Tax Rules & Rates:** A section containing:
 - Tax 1 Label:** A text field containing 'Tax 1'.
 - Tax 1 Rate:** A dropdown menu set to '0 %'.
 - Tax 2 Label:** A text field containing 'Tax 2'.
 - Tax 2 Rate:** A dropdown menu set to '0 %'.
 - Three checkboxes: 'Hourly', 'Flat Fee', and 'Additional Charge'. Below them is the text: 'Select which Slips to apply taxes to.'

Round Time

Your preference for how time should be rounded when using the Round Time function in a matter.

Auto-Round Time

When enabled, your timers will be automatically rounded to your preference when they are paused. The actual time of the slip is still remembered, so when you resume the timer, it will pick up exactly where you left it, before your time was rounded.

Billing Preferences > Options Tab (continued)

After Idle for 5 Minutes

When you have a timer running, TimeNet Law can tell if your computer has gone idle. After a certain number of idle minutes, TimeNet Law can do one of three things:

Do Nothing — keep timing and never warn about idle time

Warn About Idle Time — notify you that the computer went idle, and offer to deduct the idle time from your running timer (your choice)

Pause Timers — automatically pause the running timers

Allow Multiple Timers

You can tell TimeNet Law whether to allow multiple timers to run simultaneously. When not enabled, starting a timer while another is running will give you the option to pause the other timer or cancel the new timer.

Currency

The local currency format for your office.

Overdue After

How many days after a bill is created before it becomes overdue, or ages. See the Late Fees section for more information.

Late Fee

Applies a late fee to any invoice when it ages. The late fee is a % of the original invoice total. For example, to charge a 10% late fee per annum, set Overdue After to 30 days, and the Late Fee to 0.833. See the Late Fees section for more information.

If you do not wish to charge any interest, set the Late Fee to 0.

Tax Rules & Rates

TimeNet Law lets you have two separate global tax rates (plus a third rate that can be enabled and customized per client). The Label will be shown on the invoice, and the rate is the percentage of the invoice's taxable total to charge.

Taxes will only be applied to the types of slips you check below the Label and Rate fields. Hourly will charge tax on Timekeeper (timed) slips. Flat Fee will charge tax on Flat Fee slips. Additional Charge will charge tax on Additional Charge (expense) slips.

The Preferences Window (continued)

Billing Preferences > Automatic Bookkeeper Tab

TimeNet Law's Automatic Bookkeeper can take any funds that are in your client's Trust, Escrow, or Unapplied Credits (General Retainer) account and apply them to invoices with a balance due.

These are the global rules for the Automatic Bookkeeper. You can customize these settings for individual clients as well. If a client is not using custom Automatic Bookkeeper rules, these global rules will apply.

Apply Payments from

Select which account to pull funds from: Trust, Escrow, or Unapplied Credits

Matter Account

If you are going to use retainer accounts at the matter-level (every matter has its own accounts), rather than the client level, be sure to check Matter Account.

Client-level and Matter-level retainer accounts are exactly the same. It just depends on whether you want retainer funds tracked down to the matter level, or just want to use one account at the client level for all matters.

Use Backup Account

When enabled, this will use the selected Backup Account to pay invoice balances if the main account does not have enough funds.

Example scenario: An invoice has a balance of \$1,500. Automatic Bookkeeper is set to use the Trust Account, which has \$1,100 in it. All \$1,100 is pulled out and applied to the balance. If the Backup Fund is set, and it has enough funds, the remaining \$400 balance is paid from the backup account. Otherwise, the invoice carries a \$400 remaining balance.

Required in Trust/Escrow

If you want to require all clients to maintain a required minimum balance in their Trust or Escrow Account, enter that dollar amount here. If the account balance drops below the minimum, a Replenishment Request will be added to the total of that client's next invoice.

Automatically Run Rules on Generated Invoices

When this option is checked, Automatic Bookkeeper will run on newly created invoices as they are created. Any funds available in retainer will be applied to the invoice, shown as a payment on the invoice, and the remaining balance (if any) will be shown on the invoice all at once.

Hold Transfers

When enabled, invoices will show presumed payments to come out of the retainer, but no funds will be transferred until you do so manually. This is useful if you are required by law to wait a certain number of days before withdrawing funds out of a client's retainer in case of a dispute, etc.

The Preferences Window (continued)

Billing Preferences > UTBMS Task Code Billing Tab

If you use LEDES98B electronic billing, or otherwise use the UTBMS (Universal Task Based Management System), you can select which Task Code Categories will appear in your list of selections when creating new entries.

LEDES98B and Task Code billing requires the Task Code Module. If you are unsure of what LEDES98B or UTBMS are, then you can ignore these options.

The Preferences Window (continued)

Timekeeper Preferences - Creating and Editing Timekeepers

Every person in your office who will track their time and charge hourly rates is called a Timekeeper. Before you begin tracking time with TimeNet Law, you must create at least one timekeeper for the time to be associated with. To create a Timekeeper, click the **+** button at the bottom of the Timekeepers list.

When creating Timekeepers, use ⌘N to quickly create a new Timekeeper with the keyboard.

Timekeeper Details

Name:

Position:

Status: ID:

Billing Rates

Label	Amount
Standard	\$250.00/HR
Discount	\$180.00/HR

Creating a new Timekeeper

Name

Enter the name of the Timekeeper.

Position

The position of the Timekeeper at the firm. This is optional, and you can use the popup menu to select from common positions.

Status

The status of the Timekeeper. Active Timekeepers appear in lists when creating new entries, as well as reports. Inactive Timekeepers do not appear in lists, and are hidden from reports by default.

Timekeeper Preferences - Creating and Editing Timekeepers (continued)

ID

The ID of the Timekeeper. This is optional, and you can choose to use this field or not. The ID is required for LEDES98B electronic billing. You can also choose whether to show the Timekeeper ID on the invoice or not.

Billing Rates

You can have as many billing rates as you'd like for each Timekeeper. Rates have an hourly charge amount and a label. Rates can also be customized on-the-fly when entering timed slips.

When entering hourly rates and flat fee item amounts, you need only enter a numeric value (like 100 or 25.5). TimeNet Law will automatically format the text to be \$100.00/HR or \$25.50. You may use ⌘N to quickly create a new entry and use the Tab key to switch from cell to cell while editing.

These same conventions work throughout the program, so keep them in mind to increase efficiency when entering data into TimeNet Law.

Set Selected Rate as Default

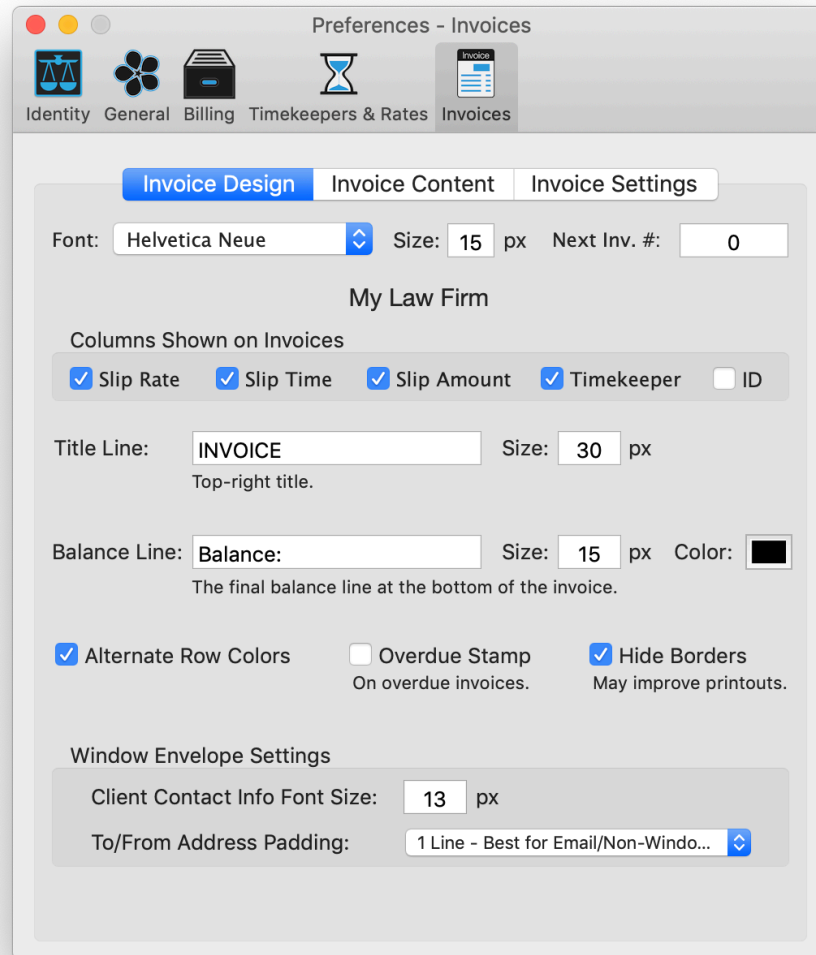
Select a rate and click Set Selected Rate as Default to set the currently selected rate as the default rate for all clients and matters. Default timekeeper rates can be further customized at the client or matter level.

Flat Fee Preferences - Creating and Editing Flat Fees

TimeNet Law lets you create flat fees on-the-fly in matters, but if you have a list of common flat fees, you can enter them here for quick access. Flat fees have a description and a cost, and you can set the quantity when adding a flat fee to your matters.

The Preferences Window (continued)

Invoice Preferences > Invoice Design Tab



TimeNet Law allows you to customize your invoice layout in many ways, so you can get a clean, beautiful invoice that looks exactly the way you want.

Font & Size

Set the font and size of the main body text. Text letterheads, headers, and footers can have different font and size settings.

Invoice Preferences > Invoice Design Tab (continued)

Next Inv #

As you create invoices, they will be numbered. This number counts up sequentially across all of your invoices. You can use dashes in your invoice number, and TimeNet Law will only increment the number after the last dash. For example, 2020-555-101 will increment to 2020-555-102, 2020-555-103, etc. You can also use custom invoice numbering per client. Configure that setting in the Client Info window.

Columns Shown on Invoices

Select which columns will appear on the invoice. Columns displayed can be customized for each client as well.

Title Line & Size

This is the line that appears in large text at the top-right of your invoices.

Balance Line, Size & Color

This is the line that shows the amount due at the bottom of your invoices.

Alternate Row Colors

When enabled, slips will be shown on invoices with alternating background colors (white or light grey) for visual clarity.

Overdue Stamp

When enabled, a red OVERDUE stamp will appear on invoices if they are overdue.

Hide Borders

Borders around the body of the invoice work well for emailed invoices, but you may wish to hide the borders so they don't run off the page when printing.

Format

Invoices can be generated in PDF format or HTML format

Headers Shown on Each Page

When using PDF format, you can customize the headers of each page of the invoice.

LEDES/UTBMS

If using LEDES98B/UTBMS billing, you can choose to show the Task Code and/or the Activity Code for each slip.

Configuring Invoices & Reports for Window Envelopes

This setting effects the font size and vertical padding for the Client's contact information on your invoices. This can be fine-tuned for use with many different window envelope formats. 1 Line of padding is best for emailed invoices or non-window envelopes. 2-8 lines can be padded around the address for use with bubble envelopes and traditional window envelopes.

The Preferences Window (continued)

Invoice Preferences > Invoice Content Tab

Preferences - Invoices

Identity General Billing Timekeepers & Rates Invoices

Invoice Design Invoice Content Invoice Settings

☒ My Name & Address ☐ Matter # ☒ Due Date

☒ Payment Check # / Details ☒ Invoice # ☐ Withdrawal Notes

Date Display: Time Display:
Example: 1/1/19 Example: 2.5 hours

Customize Retainer Account Labels

Account	Displayed As
Trust Account	Trust
Escrow Account	Escrow
Unapplied Credits	Retainer
Matter Trust Account	Trust
Matter Escrow Account	Escrow
Matter Unapplied Credits	Retainer

Header Footer

B *I* U Align:

My Name & Address

When enabled, your name and address as entered in Preferences > Identity will be shown on invoices.

Matter

When enabled, the matter name will be shown on invoices.

The Preferences Window (continued)

Due Date

When enabled, the due date of the invoice will be shown on invoices.

Payment Check # / Details

When enabled, the Check #, Wire #, or details/notes of payments shown on invoices will appear alongside the date and amount.

Withdrawal Notes

When enabled, withdrawals shown on invoices will include the details/notes of the withdrawal alongside the date and amount.

Date Display

Choose how you want the date displayed on invoices.

Time Display

Choose how you want the time for each task displayed on invoices.

Customize Account Labels

Choose how you want each retainer account displayed on invoices. The right column is editable, and is what will appear on invoices.

Header & Footer

If you would like a header or footer displayed on your invoices, you can enter them here. Headers and footers can be customized for each client as well.

All headers and footers support **HTML tags**.

To make a line bigger:

```
<span style="font-size:15px">This line is bigger, size 15</span>
```

To make a line or word bold, place a `` tag immediately before what is to be bold, and a `` tag immediately after:

```
<b>This line will be bold</b>
```

You can also combine tags. This makes the text bigger **and** bold:

```
<span style="font-size:15px"><b>This line is bigger, size 15, and bold</b></span>
```

The Preferences Window (continued)

Using Tags to Further Customize Invoices

TimeNet Law specific tags can be entered in your Text Letterhead, Header and Footer. This information will be inserted dynamically at the time of billing. Tags are inserted between two asterisk (*) symbols.

Tag	What It Inserts	Tag	What It Inserts
myLawFirm	The Name of Your Firm	*court*	The Optional Court Field
myPhone	Your Phone Number	*overdueDays*	Days Before Matter Ages
myMobile	Your Mobile Number	*clientName*	Client's Name
myEmail	Your Email	*clientATTN*	Client's ATTN Field
myAddress	Your Address (1st Line)	*clientPhone*	Client's Phone Number
myAddress2	Your Address (2nd Line)	*clientEmail*	Client's E-Mail Address
myCity	Your City	*clientAddress*	Client's Address (1st)
myState	Your State	*clientAddress2*	Client's Address (2nd)
myZip	Your Zip Code	*clientCity*	Client's City
invoiceNumber	The Invoice Number	*clientState*	Client's State
dischargeDate	The Discharge Date	*clientZip*	Client's Zip Code
due	The Invoice's Due Date		

An example footer could be: Please pay by *due* to avoid late fees.

Adding Clients

Add a client by clicking the New Client toolbar button in the main window or select File > New Client from the menubar (⇧⌘N).

Name: ACME Company, Inc.

Status: Active Client ID: Optional

Code: ACI Last Matter #: 100

Example matter number: ACI-100

Category: Custody Date Met: 1/21/19

ATTN: Jason Drummond

Address: 196 Fifth St. Line 2

City: Portland State: OR Zip: 97009

Country: Optional Birthdate: Optional

Contact Type: Contact Info

Work Email: jdrummond@drummondnrt.com

☐ Flag When Unbilled Amount Exceeds Retainer
Highlight client in red if unbilled amount exceeds retainer balance.

Billing Invoices Parties Groups ABK Notes

☐ Custom Billing Rate: per hour

☐ Custom Tax: 0 % Currency: \$

☐ Custom Late Fee: 0 % Begin Charging: Optional

Per billing cycle, not compounded. Only charge late fees after this date.

Default timekeeper billing rates and revenue allocation

Timekeeper	Default Rate	Allocation %
Andy Carhart	Standard (\$190.00)	
Sarah Fjellman	Standard (\$250.00)	

Revenue Allocation Not Used

☐ Use Task Code Billing
Use ABA Task Codes for slip entry. Required for LEDES98B.

Cancel Save Changes

Creating a Client

Name

When entering a client's name, you'll notice that TimeNet Law tries to autocomplete your entry from your Address Book contacts. You can also see a list of Address Book contacts by clicking the little blue double-arrow popup menu to the right of the Name field.

Name: Perry Fjellman

Importing a client from Address Book

Status

Status can be set to Active or Inactive. If a client's status is Inactive, it will be hidden from view in all TimeNet Law lists and windows. In the main window under the View menu you may choose to Show Inactive Clients. They will be highlighted in grey in the Main Window.

Client ID

Client ID is an optional field used for your internal records. It will not appear on invoices. Client IDs are required for LEDES98B electronic billing.

Adding Clients (continued)

Code

A client's code is used to prefix that client's matter numbers. **Each client's code must be unique.**

Matter Numbers are unique identifying codes associated with each new Matter. Matter numbers are sequential. For example if your client's code is "PJF", the Next Matter # is "100," new Matters created for this client will be numbered "PJF-100", "PJF-101", "PJF-102" and so on.

Last Matter

Matter numbers are automatically generated by the system when you create a new matter. These numbers increment by one, and you can set the starting matter number here. You are free to change the matter number to anything you want, once the matter has been created.

Category

TimeNet Law allows you to assign clients to a category. You can set the client's category here. See Categories in the **Preferences** section for more information.

Date Met

The date that you first met the client. This field is optional, and is for your internal records only.

Contact & Personal Information

Here is where you can enter your client's address, set up an ATTN field to address invoices to a specific individual, and enter as many contact lines as you need. Contact lines can have custom labels.

Flag When Unbilled Amount Exceeds Retainer

When enabled, clients will appear highlighted in red in the main window when their total unbilled exceeds the total funds in that client's retainer. Use this feature if you want to immediately be notified when a client's retainer funds won't cover the currently unbilled work.

Adding a Client > Billing Tab

Client's Currency

If your client's local currency is different than your own, set their currency here.

Custom Rate

When enabled, the entered rate becomes the default billing rate for every timed slip for the client, regardless of Timekeeper. Individual slip rates can still be customized on-the-fly, this simply sets the default rate.

Adding Clients (continued)

Custom Tax

When enabled, a custom tax rate is included in invoices. This tax rate only affects slip types that have been set to be taxable (in global Preferences, or the client's settings if using custom Automatic Bookkeeper rules).

Custom Late Fee

When enabled, this client will apply a late fee based on the overdue invoice's remaining balance due. This charge is applied when an invoice ages. For more information about how invoices age, see the **Preferences > Billing > Options Tab** section.

Default timekeeper billing rates and revenue allocation

A list of your Timekeepers will appear here. You can select the default rate for each Timekeeper from their list of rates. New matters created for this client will adopt those default billing rates. Default billing rates can also be customized at the matter level. **Default billing rates cannot be changed when Custom Rate is enabled.**

You can also set the allocation of revenue for each Timekeeper. For example, you can say that all revenue brought in by this client should be allocated 50% to one Timekeeper, 25% to another Timekeeper, and 25% back to the firm. These settings coincide with the Revenue Allocation Report, which gives you a breakdown of revenue and how it is allocated between Timekeepers and the firm. For more information, see Tracking Revenue Allocation/Origination in the **Reports** section.

Use Task Code Billing

When enabled, new matters created for this client will be set to Task Code Billing by default. Task Code Billing is required for LEDES98B electronic billing.

Adding a Client > Invoices Tab

Customize Columns Shown on Invoices

Configure how you want columns to be shown on invoices created for this client.

Show Aggregate Fees

Show the total of all fees billed to the client since inception on every invoice.

When emailing invoices...

Choose whether to email a copy of the invoice to the first email address in the client's contact list, or to all email addresses found in the contact list. You can also exclude this client from having invoices emailed.

Header & Footer Tabs

Customize the headers and footers show on invoices for this client. If left blank, the client will use the headers and footers configured in global Preferences, if any.

Adding a Client > Invoices Tab (continued)

Custom “Bill To” Address

If you want to address invoices to a different name and address than the client’s main contact information, use the Custom Bill To tab and enter the name and address how it will appear on invoices for this client.

Adding a Client > Parties/Conflicts Tab

TimeNet Law keeps track of all parties involved with your clients and their cases. This is useful for two reasons. First, it becomes a powerful contact relationship manager. But even more important, TimeNet Law performs automatic Conflict of Interest checks to ensure that when you are taking on a new client, no conflict of interest problems will arise unexpectedly in the future.

Parties can be set to one of three Status types:

- * Neutral — will not be included in any conflict of interest checks
- * Associated — will be included in conflict of interest checks
- * Conflicting — will be included in conflict of interest checks

TimeNet Law is always checking to make sure you don’t have a conflict. If you do, you’ll know right away. See the **Conflict of Interest Checking & Parties** section for more info. If TimeNet Law flags a conflict that is a false positive, or if you’ve cleared the conflict with your client, **you can waive that conflict** using the red Manage Conflict Waivers button at the bottom of the parties list.

Just like clients, parties can have an address and as many contact info lines as you need (phone, email, etc).

Adding a Client > Groups Tab

Matters can be assigned to a specific group. Every client can have their own list of groups. Grouping matters is provides help keeping things organized, and is also used for Joint Billing (creating a single invoice from multiple matters).

Adding a Client > ABK Tab

When Customize Automatic Bookkeeper is selected, this client will use their own specific rules for automatic payments, minimum required balances in that client’s retainer account, and which slip types to apply taxes to. See the “Configuring the Automatic Bookkeeper” in the **Preferences** section for more info about Automatic Bookkeeper.

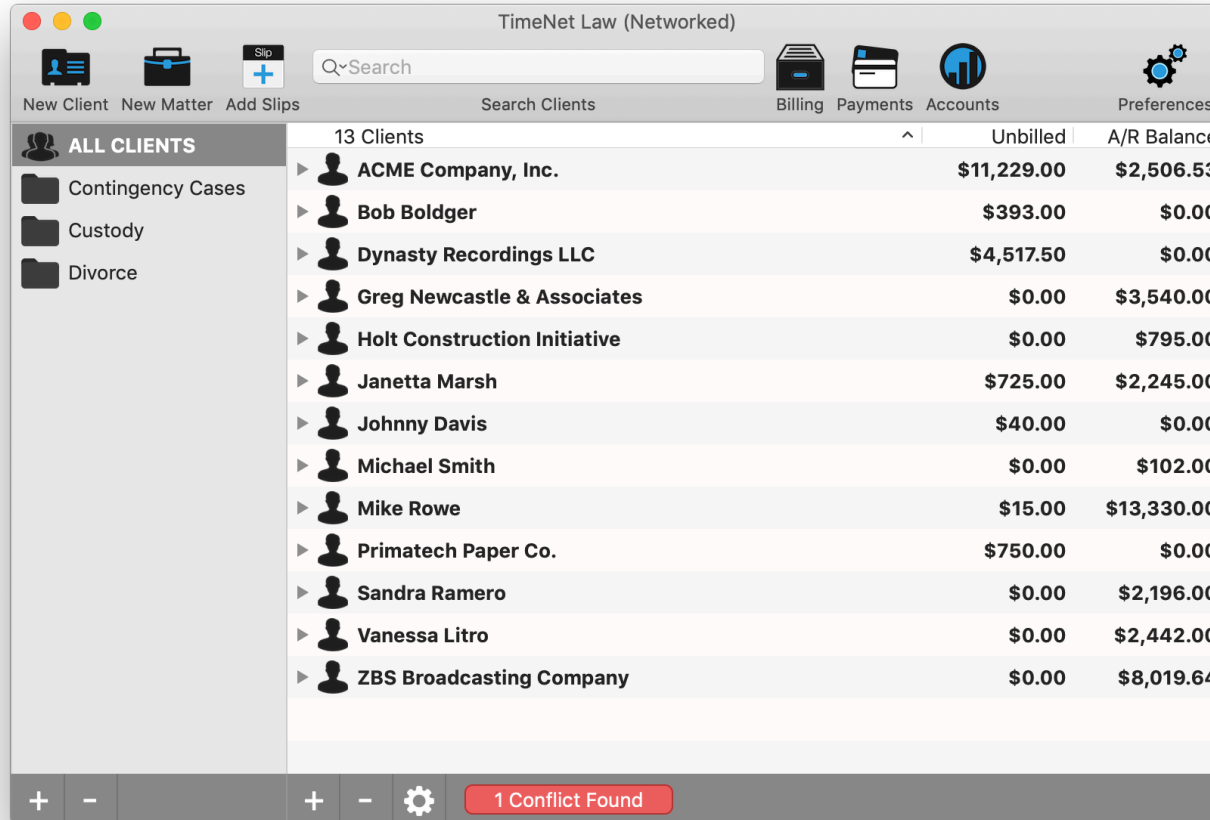
Adding a Client > Notes Tab

Every client in TimeNet Law has a large Notes field under the Notes tab, allowing you to record important details about your client for easy access later.

Conflict of Interest Checking & Parties

TimeNet Law checks for conflicts of interest automatically. As you add clients and matters, you can add any parties related to your clients and matters. Parties can be Neutral (not included in conflict checks), Conflicting, or Associated. All parties added to clients and matters that have been marked Associated or Conflicting will be included in the conflict of interest check.

If any conflicts are found, you will be notified at the bottom of the main window with the red Conflicts Badge:



The screenshot shows the TimeNet Law (Networked) application window. The top menu bar includes icons for New Client, New Matter, Add Slips, Search Clients, Billing, Payments, Accounts, and Preferences. The main window displays a list of 13 clients under the 'ALL CLIENTS' tab. The list includes columns for client name, Unbilled amount, and A/R Balance. A red badge at the bottom indicates '1 Conflict Found'.

Client Name	Unbilled	A/R Balance
ACME Company, Inc.	\$11,229.00	\$2,506.53
Bob Boldger	\$393.00	\$0.00
Dynasty Recordings LLC	\$4,517.50	\$0.00
Greg Newcastle & Associates	\$0.00	\$3,540.00
Holt Construction Initiative	\$0.00	\$795.00
Janetta Marsh	\$725.00	\$2,245.00
Johnny Davis	\$40.00	\$0.00
Michael Smith	\$0.00	\$102.00
Mike Rowe	\$15.00	\$13,330.00
Primatech Paper Co.	\$750.00	\$0.00
Sandra Ramero	\$0.00	\$2,196.00
Vanessa Litro	\$0.00	\$2,442.00
ZBS Broadcasting Company	\$0.00	\$8,019.64

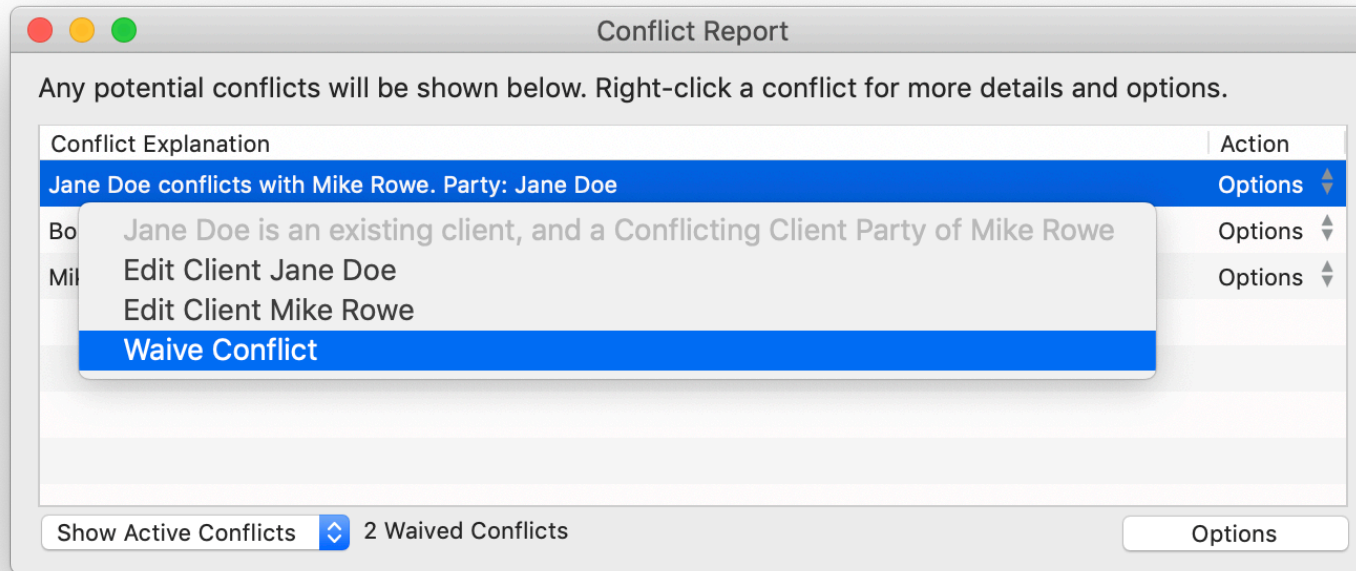
To view your conflicts, click the red Conflicts Badge, or select Report > Conflict Report.

TimeNet Law may report a conflict that is either a false positive, or one that you have cleared with the client and waived. From the Conflict Report window, right-click on a conflict, or select the conflict and click the Options button, to waive the conflict. You can also manage conflict waivers for each client from the Client Info Window under the Parties/Conflicts tab.

Conflict of Interest Checking & Parties (continued)

If you have waived conflicts you can show them by using the Conflict Filter popup menu in the bottom-left of the Conflict Report window.

Waived conflicts will not appear in the main window's red Conflict Badge. You can add a reason when waiving a conflict, which is recommended in case the question of why the conflict was waived comes up later.



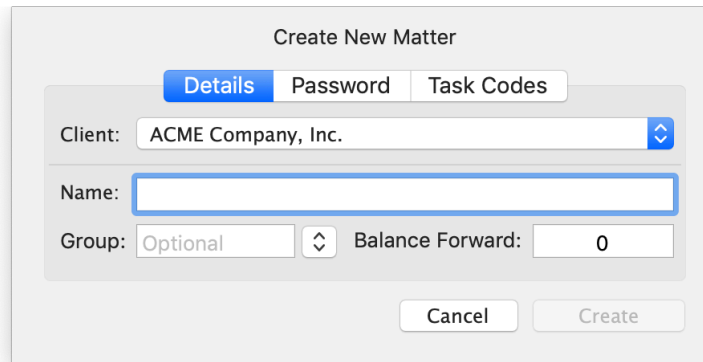
When adding or editing parties under the Client Info Window or Matter Settings Window, a red conflict alert (🚫) will appear next to the party's name if there is a conflict with that party. Click the alert for details about the conflict.

Conflict waivers are assigned to a client. To view or edit waivers, edit a client, click the Parties/Conflicts tab, and click the red Manage Conflict Waivers button at the bottom of the parties list.

Working with Matters

After you've configured your Preferences and created some clients, the next step is to create a matter. Click the New Matter toolbar button or select File > New Matter (⌘N). Note that if you have a client already selected in the main window, the New Matter window will select that client's name automatically. You'll also notice if you try to open a client with no matters, a Create New Matter shortcut will appear. Double-click this to create a new matter for that client.

Creating Matters

The image shows a 'Create New Matter' dialog box with three tabs: 'Details' (selected), 'Password', and 'Task Codes'. In the 'Details' tab, there are four fields: 'Client' with a dropdown menu showing 'ACME Company, Inc.', 'Name' with an empty text box, 'Group' with a dropdown menu showing 'Optional', and 'Balance Forward' with a text box showing '0'. At the bottom right are 'Cancel' and 'Create' buttons.

Create New Matter

Details Password Task Codes

Client: ACME Company, Inc.

Name:

Group: Optional Balance Forward: 0

Cancel Create

Client

The client that this Matter will belong to. Every Matter must belong to a specific client.

Name

The name of the Matter. This can be changed at any time from the Matter Window.

Group

The group that this matter will be assigned. This can be changed at any time from the Matter Window.

Balance Forward

If you're carrying a balance over to this Matter, enter it here. You can edit or remove the Balance Forward at any time from the Matter Window.

Password

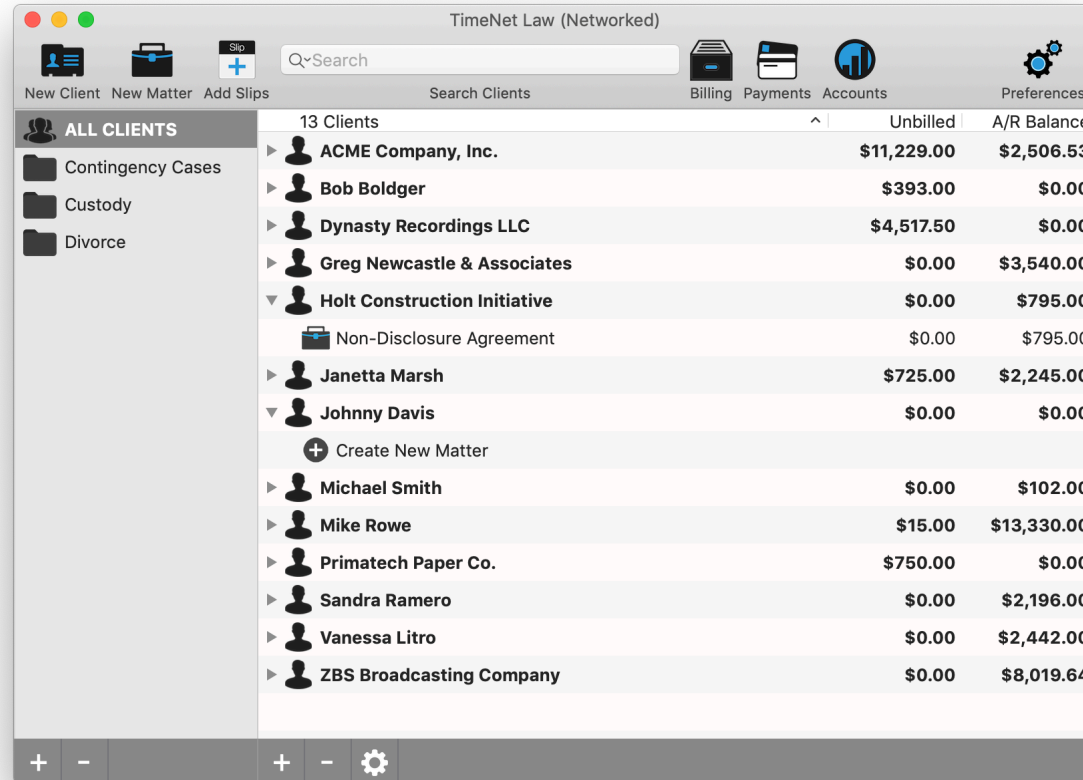
If you would like to lock this matter with a password, enable that option and set the password in the Password tab. Locked Matters cannot be opened or modified without the password, but payments can be applied and invoices can be generated without the password.

Task Codes

If you want to use Task Codes (required for LEDES98B electronic billing), enable that option here. This can be changed from the Matter window.

Working with Matters (continued)

Navigating Your List of Clients and Matters



TimeNet Law's Main Window

Once you've created some Matters, they will be filed underneath each client's name. Simply double-click a client's name, or click the grey triangle, or press Return on your keyboard with a client's name selected to view their list of matters.

To open a matter, double-click it or press Return on your keyboard while it is selected in the Main Window. As you add slips to your Matters and create invoices, the Unbilled and A/R Balance columns in the main window will update live to reflect the current totals.

Matters contain a few basic details, such as name, Matter Number, a Start Date and End Date. Start and End dates are used internally for your records only, and aren't shown on invoices unless you've set the Date Display option in Preferences > Invoices > Invoice Content to "Start Date — End Date".

Working with Matters (continued)

Matters also contain slips that you create. Every slip belongs to a matter. In this window you can create, edit, and delete slips. You can also create, re-issue, and delete invoices. Every invoice also belongs to a matter. Finally, every Matter lets you customize billing rates and rules, parties, and many other settings, accessed through the Matter Settings button.

The Matter Window

When you first create a new Matter, it will look something like this:

ACME Company, Inc. - Fees for Services Rendered

New Slip Start Timer Payments Create Invoice Client Info Matter Settings Invoices Notes

Matter Name: Fees for Services Rendered

Matter #: ACI-101

Began: 1/21/19 Ended: Unfinished

TIME 0:00:00

Unbilled \$0.00

Total \$0.00

Description	Date	Timekeeper/Charge	Time/Amt	Subtotal
New Slip				

You can change the name, number, start date, and end date at any time. As Slips are added to the Matter, the totals and time shown in the upper-right corner will update in real time.

Click on the **Total** field in the upper-right corner to switch between viewing a full total or an A/R balance for this matter.

From within the Matter window, you may add Slips, control the Slip Timer, jump to the Payment Center for this Matter, Create an Invoice for this Matter, view/edit the Matter Settings, view/edit the invoices associated with this Matter, and view/edit Notes for this Matter. The Notes drawer will also show Slip notes for the selected Slip.

Working with Matters (continued)

Matter Window Toolbar

New Slip

Use this to create a new Slip. See **Creating a New Slip** on the next page for more information.

Start Timer

Use this to start your timer. If a Slip is selected, that Slip's timer will be started. Otherwise, you will be prompted to create a new Timekeeper Slip.

Payments

Use this to open the Payment Center. The Client and Matter will automatically be selected in the Payment Center, so you can quickly apply a new payment or view this Matter's payment history.

Create Invoice

Use this to create a draft or final invoice from the all or some of the unbilled Slips in this Matter.

Matter Settings

Use this to view and change the Matter Settings for this Matter. See the **Matter Settings** section for more info.

Invoices

Use this to view a list of all previous invoices created for this Matter. From here, you can cancel (delete) the invoice, Re-Issue it if it still has a balance due, and jump to the Payment Center to apply payments to this invoice.

Notes

This is where you can keep detailed notes about this Matter. They are for your internal records and will not be shown on the invoice. **You can also switch to the Slip Notes Tab** to view and edit notes for the selected slip without opening the Edit Slip window.

Creating a New Slip

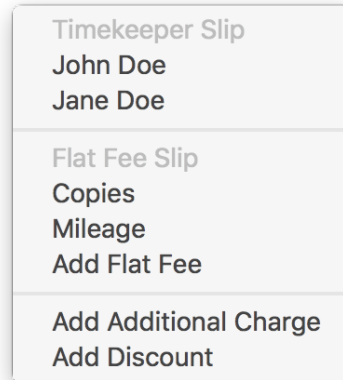
Slips are entries that you add to your matter. Each slip represents a task, an expense, a discount, or a flat fee. There are several ways to add a Slip to a Matter.

- * Click the Add Slips button in the Toolbar
- * Click the + button in the bottom left-hand corner of the window
- * Right-click (control+click) in the grey and white slips list
- * Use one of the Matter > New Slip commands in the menubar

Working with Matters (continued)

When you click the **+** button, right-click, or use the Add Slips toolbar button, you will be shown a menu with a list of Timekeepers and Flat Fees from your global Preferences, as well as other slip types: Flat Fee, Additional Charge, and Discount.

Choose the type of slip you want to add from the menu. **To create a timed slip, select the Timekeeper to assign the time to.**



When editing slips, you'll notice the Enter/Return key on your keyboard will not activate the OK button if you are editing text in a multi-line text field, such as Notes. However, **you can always activate the OK button via your keyboard** using one of these two methods:

- * Pressing ⌘Enter
- * Pressing Enter on your Num Pad (if your keyboard has a Num Pad)

Timekeeper Slips

When you select a Timekeeper from the Add Slip popup menu, the Timekeeper Slip window will open.

The screenshot shows a 'Timekeeper Slip' window with the following details:

- Timekeeper:** Andy Carhart
- Task:** New Task
- Date:** 1/21/19
- Time:** 0.0 hrs
- Rate:** Standard (\$190.00)
- Type:** Billable
- Notes:** Will appear on invoice and affect total.
- Slip Total:** \$0.00
- Buttons:** Cancel, OK
- Checkbox:** ☐ Start Timing Now

Timekeeper

This is the Timekeeper that the slip is associated with. The Rate popup is filled with the selected timekeeper's rates.

Task

This is the task that is being performed. By default, tasks will be shown on your invoices. You can also have TimeNet Law only show the Notes field (shown at the bottom of Timekeeper Slip window), and not the Task. However, entering a task name is recommended either way for internal use. Use the popup to the right of the field to see your Quick Entry list, or begin typing and TimeNet Law will make suggestions automatically.

Date

The date will appear next to this slip on invoices.

Time

This is the amount of time spent on the slip. If it is a new task, you can ignore this and use the timer to track your time. If it is a task you've already spent time on, you can manually adjust the time here.

You can change the format of time entry to **Tenths** (1.5 hours) or **hours : minutes : seconds** (1:30:00) one of two ways:

- * Anywhere you enter time, you can click the Time: field for a shortcut to change the Time Entry setting.
- * Change the Time Entry setting in **Preferences > General > General Tab**.

The up and down arrows make it easy to quickly add or subtract time. In **Tenths** time entry mode, they go up and down by 0.1 hour. In **hours : minutes : seconds** mode they go up and down by one minute.

Rate

This is the hourly rate at which this time will be billed. Choose the desired timekeeper rate or select Custom to override the hourly rate. If the client has a custom rate set, you will not see timekeeper rates in this popup, but only the Client Rate and the Custom option.

Type

A Timekeeper Slip can be one of three types.

- * Billable — will affect matter earnings and be shown on invoices.
- * For My Eyes Only — won't affect matter earnings or be shown on invoices. For internal use only.
- * No Charge — won't affect matter earnings **but will be** shown on invoices. For pro bono services.

Notes

This is where you can keep detailed notes for the task. These notes will always be available internally, and can also be shown on invoices. You may also choose to show **just** the notes and omit the task name from the invoice.

Working with Matters (continued)

The **More Tab** contains less-frequently used Timekeeper Slip settings.

The screenshot shows a dialog box with two tabs: 'Details' and 'More'. The 'More' tab is selected. The dialog contains the following fields and controls:

- Attached File:** A text field with the placeholder 'Click here or drop a file to set' and a close button (X) on the right.
- Status:** A dropdown menu currently showing 'Work In Progress'. Below it is the text 'The slip is still in progress.'
- Mark Down:** A text field showing '\$0.00'. Below it is the text 'Discount prior to invoicing.'
- Slip Topic:** A dropdown menu currently showing 'None'. Below it is the text 'Used for grouping slips by topic on invoices.'
- Time of Day:** A text field showing '4:49 PM'. Below it is the text 'The time of day this task was performed.'

At the bottom of the dialog, there is a summary bar showing 'Slip Total: \$0.00', a 'Cancel' button, and an 'OK' button. Below the summary bar is a checkbox labeled 'Start Timing Now' which is currently unchecked.

Attached File

This file will be opened when this slip's timer starts. To remove this file link, use the X button.

You can drag a **folder** here to open a folder with multiple files when the timer is started.

Status

All slips are either Work in Progress (WIP) or Billed. This is where you can set that status. If you set it to Billed, you must attach it to an existing invoice. When creating invoices, WIP slips become Billed and attached to the new invoice automatically.

Mark Down

Used to apply a quick discount to this specific slip **before** invoicing.

Working with Matters (continued)

Slip Topic

Used to group and subtotal slips together on your invoice.

Before you can assign topics to slips, you must first create a list of topics for this matter in **Matter Settings > General > Slip Topics**. More info on **Matter Settings** can be found in the next section.

Time of Day

The time of day the task was completed. This optional field is for your internal records, and will not be shown on invoices or reports.

Additional Charge Slips

Additional Charge Slips are shown as Expenses in all reports. They are not tied to a Timekeeper, and are not charged hourly: you enter the flat amount, and optionally the quantity.

Flat Fee Slips

Flat Fee Slips are shown as Fees in all reports. They are not tied to a Timekeeper, and are not charged hourly: you enter the flat amount, and optionally the quantity.

Discount Slips

Discount Slips are shown as Discounts in all reports. Discounts can apply to **only fees**, **only expenses**, or to the **full total**. Discounts can be entered as flat amounts (\$100 off) or a percentage (10% off).

Working with Matters (continued)

Using the Timer

The Timer helps you capture more billable time — it is important that you use it and know how it works. There are several ways to use the Timer.

From the Matter Window

When you have a Matter open, you can select any unbilled Timekeeper Slip and use the Start Timer button in the Matter Window's toolbar. If you click the Start Timer button without a Slip selected, you will be prompted to create one.

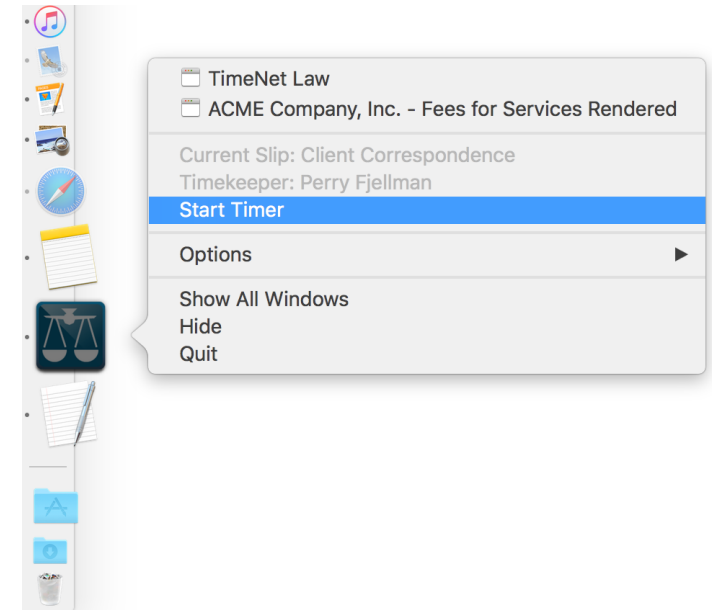
In a Matter Window, you can use the spacebar to start and stop the timer, or select **Matter > Start Timer (⌘T)**

The currently timing slip will always be **highlighted in orange**. The time of the currently running Timer will also appear on the Dock icon and in the menu bar if you have enabled the Menu Bar Widget.

From the Dock or Menu Bar Widget

Quickly start and stop the timer from any application using the Menu Bar Widget or the Dock icon. Automatic Smart Rounding and Idle Detection help ensure that your billed amounts are exactly as they should be.

With a Matter open and a Timekeeper Slip selected, you will see details about the selected Slip and a Start/Pause Timer function when you click and hold on the TimeNet Law icon in your Dock, or use the Menu Bar Widget in the righthand side of your menubar. These functions work from any application, even with TimeNet Law hidden.



QuickTimers

QuickTimers allow you to immediately begin tracking time for a new task, even if the matter isn't currently open, or doesn't exist at all.

Using the QuickTimer

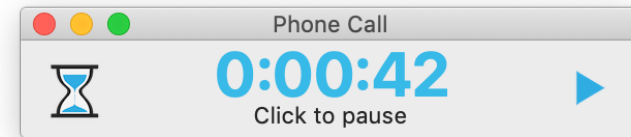
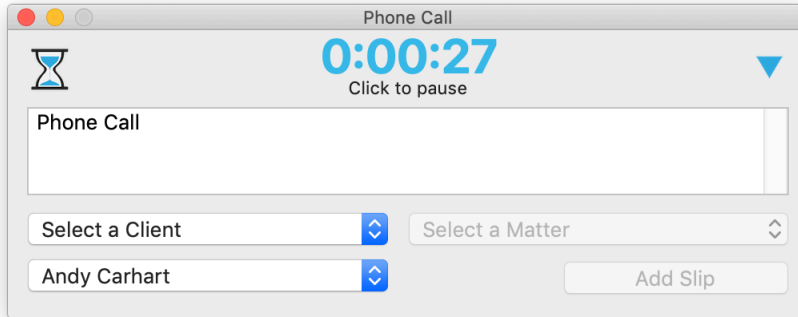
Sometimes you need to begin timing a task immediately. Start a new QuickTimer by selecting New QuickTimer from the Menu Bar Widget, or by using the global keyboard shortcut. By default, it is Shift + Command + Up Arrow. This shortcut can be changed in **Preferences > General > General Tab**.

Working with Matters (continued)

The QuickTimer will float above other applications so it is always visible. You can click the time to start or pause the timer. When you are ready to save it, select a client from the first popup menu. Next, select a Matter. If one doesn't exist, select Create New Matter to make a new one.

You can change the Timekeeper if you need to by clicking the Timekeeper name in the bottom-left corner of the window.

Click Add Slip to add it to the selected Client and Matter.




Time Rounding

TimeNet Law's Smart Rounding feature is very useful. You can have every slip automatically rounded as the timer is paused, or you can round time manually if/when you choose.

To tell TimeNet Law what you want your time to be rounded to, be sure the Round Time setting in **Preferences > Billing > Options** is properly set. 6 Minutes is the default.

When a slip's time has been rounded, you will see the Rounded icon next to the slip's time.

Description	Date	Timekeeper/Charge	Time/Amt	Subtotal
Client Correspondence	9/3/16	Perry Fjellman	0:42:00 	\$196.00
New Task	9/3/16	Perry Fjellman	1:18:54	\$368.20

Automatic Rounding

To have time rounded automatically, be sure the **Auto-Round Time** option is enabled in **Preferences > Billing > Options**.

Whenever a running timer is paused, it will automatically be rounded to your preference. When you resume the timer, it will revert to the Actual Time of that slip, so as not to end up with erroneous time from compounded rounding.

Working with Matters (continued)

Manual Rounding

To round all unbilled slips in a Matter, open the Matter and select **Matter > Round Slip Time (⌘R)**.

Undo Rounding

If you ever want to revert all unbilled slips back to Actual Time, open that Matter and select Matter > Revert to Unrounded Time.

Adding a Balance Forward (Previous Balance) to a Matter

Use a Flat Fee slip named “Previous Balance” (or something similar) and enter the dollar amount of the previous balance. This Flat Fee will be shown at the bottom of your next invoice, and be added to the total. You can also add a Previous Balance to a new matter automatically when creating it using the Balance Forward field when creating the matter.

When creating a new Matter, use the Balance Forward field to have this step be performed automatically.

Working with Matters (continued)

Slips Highlighted in Red

Slips will appear **highlighted in red** if the Time/Amt column is zero. This is designed to help you quickly identify slips that may have been created but haven't had any time applied to them yet.

No Charge slips will never appear highlighted in red.

Description	Date	Timekeeper/Charge	Time/Amt	Subtotal
Client Correspondence	9/3/16	Perry Fjellman	0:42:00 ↺	\$196.00
Document Preparation	9/3/16	Perry Fjellman	0:00:00	\$0.00

Viewing and Editing Slips

Double-click any Slip in a Matter window to open the Slip Editor window, or select it in the list and press return on your keyboard.

Here you can see all of the settings for the slip. If a Slip has been billed, you will not be able to make any changes. However, you can cancel the invoice that slip belongs to, or convert that slip from billed back to Work in Progress. You can also attach a Work in Progress slip to an existing invoice.

Hiding Billed Slips

If a Matter runs for multiple billing periods, you may end up with a lot of billed slips. You can hide them by selecting **View > Hide Billed Slips**. Hidden slips are always included in reports, and can be shown again by selecting **View > Show Billed Slips**.

This setting is saved independently for each Matter.

Task Code Billing

When creating Matters or Clients in TimeNet Law, you can enable Use Task Code Billing.

Task Code Billing requires you to select your tasks and expenses from pre-defined lists (Uniform Task Based Management System). TimeNet Law includes Bankruptcy, Counseling, Litigation, Patent, Project and Trademark task codes, plus the Activity Code set.

Task Code Billing is required to generate invoices in LEDES98B format. See the **LEDES98B Billing** section for more info.

Working with Matters (continued)

Editing Matter Settings

To edit a Matter's Settings, open the Matter and click the Matter Settings button in the toolbar.

The screenshot shows the 'Matter Settings' dialog box with the 'General' tab selected. The 'When Invoicing' dropdown is set to 'Only include this matter'. The 'Matter Group' dropdown is set to 'Optional', with a note below it stating 'Groups are used to bill multiple matters on one invoice.' Below these, there are tabs for 'Password', 'Required Funds', 'Slip Topics', and 'LEDES & Task Cod...'. The 'Password' tab is active, showing a checkbox for 'Lock This Matter with a Password' (which is unchecked), a password icon, and input fields for 'Password:' and 'Confirm:'. At the bottom are 'Cancel' and 'OK' buttons.

Matter Settings > General Tab

Group

You can assign this Matter to a group. A list of groups must first be created in the Client Info window for this client.

When Invoicing

When creating invoices from this Matter, the slips that make up that invoice will be determined by this setting.

- * Only include this matter
- * Include all matters
- * Include matters in the same group

If the second or third option is selected, this matter will become a Master Matter. Invoices created from this matter will include slips from other matters that match this setting. See the **Joint Billing** section for more info.

Working with Matters (continued)

Password Tab

Turn the password lock on or off for this matter. When enabled, you must enter the correct password to open the Matter.

Required Funds Tab

Every Matter has its own Trust, Escrow, and Unapplied Credits account. These accounts behave the same as the client-level accounts. If you wish to require that a minimum amount of funds be kept in any of these Matter accounts, enter the amount here.

Slip Topics Tab

Create a list of Slip Topics here. Individual slips can be assigned a topic, and then those slips will be grouped together and subtotaled on invoices created from this matter.

Task Codes Tab

Turn Task Code Billing on or off. When enabled, you are required to select your tasks from a predefined list (UTBMS). This mode is required for LEDES98B electronic billing.

There are also two required fields for LEDES98B billing. LAW_FIRM_MATTER_ID and CLIENT_MATTER_ID. See **LEDES98B Billing** for more info.

Matter Settings > Timekeeper Settings Tab

Default Slip Type

When creating new Timekeeper slips, set whether they should default to Billable, For My Eyes Only or No Charge.

Round Time

Customize the setting for what your time is rounded to.

Default Timekeeper rates and revenue allocation

A list of your Timekeepers will appear here. You can change the default rate for each Timekeeper.

You can also set the allocation of revenue for each Timekeeper. For example, you can say that all revenue brought in by this Matter should be allocated 50% to one Timekeeper, 25% to another Timekeeper, and 25% back to the firm. These settings coincide with the Revenue Allocation Report, which gives you a breakdown of revenue and how it is allocated between Timekeepers and the firm. For more information, see Tracking Revenue Allocation/Origination in the **Reports** section.

Working with Matters (continued)

Matter Settings > Billing Tab

Budget

If you want to limit this Matter to a budget, enter the amount here. The Starting On date will only count slips entered after that date. If **Discount Any Slips Over the Budget Amount** is turned on, the Matter will automatically create a Discount Slip to keep the Matter's total within the budget.

When a budget is set, you will see the Budget Meter just below your Unbilled and Total displays. The meter will fill with grey as you use up the budget, and turns red when you've met or exceeded the budget.

ACME Company, Inc. - Contract Preparation

Create Invoice Client Info Matter Settings Invoices Notes

TIME 0:00:00

Unbilled \$4,186.00

Total \$4,186.00

Budget 104.65%

TIME 0:00:00

Unbilled \$2,842.00

Total \$2,842.00

Budget 71.05%

Time/Amt	Subtotal
x1	\$4,186.00

Time/Amt	Subtotal
x1	\$2,842.00

Working with Matters (continued)

Billing Hold

Turn this on if you want this Matter excluded from One Click Billing. Invoices will not be created for this Matter until Billing Hold is turned off.

Recurring Fee

Turn this on if this Matter has a recurring fee associated with it. A Flat Fee Slip will be created automatically for every new billing period. You can customize the name and amount of the fee here.

Contingent Billing

When turned on, this Matter will be billed using Contingency Billing. See the **Contingency Billing** section for more info.

Working with Matters (continued)

Matter Settings > Parties Tab

Every Matter can have a list of related parties. TimeNet Law performs automatic Conflict of Interest checks to ensure that when you are taking on a new client, no conflict of interest problems will arise unexpectedly in the future.

Parties can be set to one of three Status types:

- * Neutral — will not be included in any conflict of interest checks
- * Associated — will be included in conflict of interest checks
- * Conflicting — will be included in conflict of interest checks

TimeNet Law is always checking to make sure you don't have a conflict. If you do, you'll know right away. See the **Conflict of Interest Checking & Parties** section for more info.

Splitting Billing Between Parties

If more multiple people will be responsible for paying, set the % Responsible for each party here. See the **Split Billing** section for more info.

Matter Settings > Parties Tab

Custom Fields are shown on invoices below the Invoice Number. You can have as many Custom Fields as you'd like.

Working with Matters (continued)

Importing Slips from a Spreadsheet or Text File

If you'd like to import a group of slips from a spreadsheet or text file, first be sure the file is in the proper format is in the proper format.

For a spreadsheets, set your columns up in the format below:

Slip Name	Slip Date	Slip Timekeeper	Slip Time	Slip Rate	Slip Notes
-----------	-----------	-----------------	-----------	-----------	------------

For a text file, separate each column with two commas (,,) See the example below:

Slip Name,,Date,,Timekeeper,,Time,,Rate,,Notes

The time format can be either **Tenths** (1.5) or **hours : minutes : seconds** (1:30:00).

Once you've got your spreadsheet or text file properly formatted, select the lines you'd like to import from your file and select Edit > Copy. Next, open a Matter in TimeNet Law to import the slips to, hold the Option key down on your keyboard, and select Edit > Paste from Spreadsheet/Text.

Working with Matters (continued)

Turn Calendar Events into Billable Time - Importing from Calendar

You can easily bill for events you've schedule in Calendar. Open the Matter you'd like to import the events into, and select **Matter > Import Slips from Calendar**. The Event Import window will open. Here you cans select a specific calendar and enter a date range.

Check off the event(s) you want to import, pick whether the event should be billed as a timed slip or an expense slip, and enter any further details about the import. Then click the Import button.

Work

This Week

9/5/16

9/5/16

Import Calendar Events

Event	Date	Time
<input checked="" type="checkbox"/> Client Meeting	6/9/15	1.0
<input checked="" type="checkbox"/> Court Appearance	6/9/15	1.0
<input checked="" type="checkbox"/> Phone Call with Client	6/10/15	1.0
<input checked="" type="checkbox"/> Meeting with Clerk	6/10/15	1.0
<input checked="" type="checkbox"/> Libray Research	6/11/15	1.0

Import Completed Tasks

Completed Task

Slip Settings

Slip Type: Timekeeper

Timekeeper: Perry Fjellman

Rate: Standard

\$225.00

Type: Billable

Will appear on invoice and affect total.

Notes:

Cancel

Import

Importing Events from Calendar

Working with Matters (continued)


Linking Matters (Matter Mirroring)

There may be times when you'd like two Matters to stay in sync, so that changes to one matter get automatically made to another matter. For example, you may want to split the billing between two separate clients. Linking two matters together, and adding a 50% discount to the linked matters will allow you to easily accomplish this.

To link two Matters together, first be sure both Matters have been created. Next, open one of the Matters, click select **Matter > Link to Another Matter** (Option+M). You will be prompted to select a Matter, and when you click Link, those two Matters will stay in sync going forward.

LINKING ONE MATTER TO ANOTHER WILL OVERWRITE ALL SLIPS ON THE MATTER BEING LINKED.

Be sure to only link to matters that are empty or have entries that you don't mind being erased. If you need to save the slip entries from the linked matter, **copy and paste them into the matter you are linking from** before linking the matters.

You will see a small Linked icon in the Matter Window, and the Main Window next to each linked Matter, indicating this Matter is linked with another Matter: 

If you click the Linked icon, you will be shown which matter is linked, and given the option to remove the link.

Linked Matters will have mirrored slips. Any slip added, changed, or deleted from a linked matter will have the same change made to the linked matter automatically.

The Matter name and Matter Settings **will not** be mirrored. Linked matters can have different names and different matter settings, but the slips will always be in sync. Additionally, billing one linked matter **will not** bill the other linked matter.

Removing a Link Between Matters

Open either of the linked matters, click the Linked icon  and click the Remove Link button.

Adding Slips Quickly

Up until now we've covered opening a Matter to add slips to it. Another way to add a slip to a Matter is to use Add Slips. This one-window input screen streamlines process, allowing you to quickly create a Slip, or a batch of Slips for multiple Clients and Matters.

Click **Add Slips** in the Main Window's toolbar, Select **Add Slips from** the Menu Bar Widget, or use the Option+S keyboard shortcut to get started. You can also configure a global keyboard shortcut to bring up the Add Slips window, even if TimeNet Law is not the active application.

The settings found in the Add Slips window are the same as those found when doing it from the Matter. See the **Timekeeper Slip** and **Additional Charge Slip** sections for more more info.

Entering Dates

Anytime there is a date field in TimeNet Law, you can do a few cool tricks.

* Click the calendar button  and select a date:



- * Type literals like **Today**, **Yesterday** or **Tomorrow**
- * Press ⌘D to insert today's date
- * Use ⌘ Up Arrow and ⌘ Down Arrow to move back or forward by one day

Creating Invoices

There are two ways to create invoices from Slips. The first way is to open the Matter with the work performed that you'd like to invoice, and click the Invoice toolbar.

The screenshot shows a 'Create Draft' window for an invoice. At the top, it says 'Create Draft' and 'Invoice Total: \$7,361.34'. Below this are three tabs: 'Invoice Options' (selected), 'Slips (8 Selected)', and 'Invoice Layout'. Under 'Invoice Options', there is a 'Draft Mode' checkbox which is checked. To the right is an 'Invoice #' field with the value 'ACI-7655'. Below this is a preview text: 'View a preview of this invoice before finalizing your billing. Slips will remain unbilled.' Further down are fields for 'Invoice Date: 1/21/19', 'Due Date: 2/20/19', and 'Due In: Custom'. Below these are checkboxes for 'Save', 'CSV', 'LEDES98B', and 'Email'. Under 'Save' is the text 'Save a copy'. Under 'CSV' is 'To export'. Under 'LEDES98B' is 'For E-Billing'. Under 'Email' is 'Email to perry@applesource.us'. Below this is an 'Optional Content' section with checkboxes for 'Slip Notes' (checked), 'Balance Forward', 'Show Payments' (checked), 'Show Retainer Deposits' (checked), 'Non-Billable Time Total' (checked), and 'Retainer Replenishment' (checked). There are also dropdown menus for 'All Notes', 'Single Matter', and 'Last 90 Days'. At the bottom are 'Cancel' and 'Create Draft' buttons.

Creating an invoice from a Matter Window

When creating an invoice, you can set the date, terms, and what exactly will appear on the invoice. You can see the total in the lower-left hand corner. Use the Slips tab to customize which slips will be included in this billing. The Invoice Layout tab lets you customize how the invoice looks and what information is included on the bill.

If Draft Mode is checked, creating this invoice will only produce it as a visual draft, but Slips checked for this invoice will not be finalized and will remain Work in Progress.

If Draft Mode is unchecked, the Slips checked for this invoice will be converted to Billed and associated with this invoice. Those slips can no longer be edited unless they are converted back to Work in Progress.

Creating Invoices (continued)

Converting Slips from Work in Progress to Billed and Vice Versa

In the Matter window, you can right-click selected Slips to quickly attach them to an existing invoice or convert them back to Work in Progress.

Bulk Invoicing for All or Multiple Clients




You can also bulk-invoice all work in progress for multiple Clients and Matters at once. To do this, open the Billing Center and click the Bulk Billing toolbar button. See more about the Billing Center in the next section.

Printing Bulk Invoices

After running your bulk billing, the invoices will be saved to a folder of your choosing. The folder will open automatically so you can review the invoices. If you'd like to print them all at once, select them all in the Finder window and select File > Print.

Viewing, Re-Issuing, and Cancelling Invoices

In the Matter Window, click the Invoices button in the Toolbar to slide out the Invoice panel, which shows all invoices and their balances for this Matter. Overdue invoices will appear in red.

Matter SettingsInvoicesNotes

26:12:00

Invoices

	Invoice	Date ^	Balance
\$50.00	ACI-7531	6/1/17	\$0.00
\$9,686.53	ACI-7565	8/1/17	\$0.00
	ACI-7591	9/19/17	\$1,606.53
	ACI-7650	9/6/18	\$900.00
Subtotal			

\$300.00

\$150.00

\$1,640.00

\$1,560.00

\$480.00

\$15.00

\$30.00

\$47.53

\$50.00

\$800.00

\$200.00

\$1,500.00

\$14.00

\$1,920.00

\$600.00

\$30.00

\$50.00

Balance: \$2,506.53

The Invoices Panel of a Matter Window

Creating Invoices (continued)

Right-clicking or control+clicking an invoice in this list will allow you to:

- * View & Apply Payments
- * View & Edit Late Fees (if you've enabled the Late Fee option)
- * Re-Issue the invoice
- * Cancel the invoice

Re-Issuing the invoice will open it again so you can save it, print it, or email it. This allows you to regenerate the invoice if you need to recall another copy, and want to show new payments and late fees applied since the original invoice date.

Cancelling the invoice will delete the invoice from the system, including all payments and late fees. The slips originally billed on the invoice will **not** be deleted, they will be converted back to Work in Progress. If payments have been applied from a retainer, those payments will be deposited back into the retainer automatically. If payments have been directly applied (from cash, check, etc), you will be prompted that the invoice contains payments, and given the option to delete the payments all-together, or deposit them into a retainer account for the client or matter.

Having Invoices Automatically Emailed to Clients

TimeNet Law can automatically email invoices to your clients. Be sure you've entered at least one email address for your client under their Contact Info list.

You will also need to configure a Mail Server that will be used to send the emails. Select **Edit > Configure Mail Server** to configure these settings.

Here you can enter the information for your Mail Server. You can also customize the email subject and body text for emails. A PDF file of the invoice will be attached to the email.

When creating your invoice or using One Click Billing, be sure the Email option below the Invoice Date and Due Date is checked.

Contingency Billing

To use Contingency Billing, open the Matter you'd like to bill for contingently, go to Matter Settings > Billing, and then check the Contingency Billing option:

The screenshot shows a dialog box titled "Contingency Billing" with five tabs: "General", "Timekeeper Settings", "Billing" (selected), "Parties", and "Custom Fields". The "Billing" tab contains the following settings:

- Budget:** A text field with the value "\$2,400.00".
- Starting On:** A date field with the value "1/21/19" and a calendar icon.
- Discount Any Slips Over the Budget Amount:** An unchecked checkbox.
- Billing Hold:** An unchecked checkbox with the description "Exclude this matter from bulk invoicing."
- Recurring Fee:** An unchecked checkbox with the description "Include a flat fee on every new invoice created."
- Name:** An empty text field.
- Amount:** A text field with the value "\$0.00".
- Contingent Billing:** A checked checkbox.
- Recovery Amount:** A text field with the value "\$25,000.00".
- Your Fee:** A text field with the value "10.0" followed by a percentage sign "%".
- Charge Type:** Three unchecked checkboxes: "Hourly", "Flat Fee", and "Additional Charge". Below them is the text "Select which Slips to charge for."
- Deduct slips charged after calculating your fee:** A dropdown menu with the selected option "Deduct slips charged after calculating your fee" and a blue arrow icon.

At the bottom right of the dialog box are two buttons: "Cancel" and "OK".

Using Contingent Billing

Once you've enabled Contingent Billing, you can enter in your fee, and the recovery amount (which can be entered later). You can also select which slips to charge for, and whether you want your fee calculated before or after deducting those slips from the recovery.

Joint Billing

Joint Billing allows you to bill multiple matters on one invoice. Joint Billing can either include a group of matters, or all Matters.

Joint Billing by Group

First create at least one group in the client settings under the Groups tab:

The screenshot shows a client management interface with the following elements:

- Name:** My New Client
- Status:** Active
- Client ID:** Optional
- Code:** MNC
- Last Matter #:** 100
- Example matter number:** MNC-100
- Category:** Optional
- Date Met:** 1/21/19
- ATTN:**
- Address:**
- City:**
- State:**
- Zip:**
- Country:** Optional
- Birthdate:** Optional
- Contact Type** and **Contact Info** table
- Flag When Unbilled Amount Exceeds Retainer** checkbox
- Groups tab** with a list of groups (Group 1)
- Buttons:** Cancel, Create Client

Setting a Client's Groups

Next, open the Matters that you would like to bill jointly, click on the Matter Settings button, and set their Group setting all to the same group. You can also see and edit Matter Groups from the main window by select Show Matter Group Column from the View menu.

Lastly, pick one of the Matters to be designated as the Master Matter. This is the Matter to open and invoice from, and when generating invoices, all unbilled slips on other Matters that match this Matter's Group will be included. Open this Matter, click the Matter Settings button, and turn on the Master Matter option under the General tab.

Joint Billing (continued)


General Timekeeper Settings Billing Parties Custom Fields

Group: Group 1
Assign matter to a group. Groups are created in the Edit Client window.

When Invoicing: Include matters in the same group

Password Required Funds Slip Topics Task Codes

☐ Lock This Matter with a Password

 Password:
Confirm:

Cancel OK

Joint Billing for All Matters

Pick a Matter to be designated as the Master Matter. This is the Matter that will create invoices **for all other Matters**, and all unbilled slips from every other Matter will be included. Open this Matter, click the Matter Settings button, set the Group to **ALL MATTERS** and turn on the Master Matter option under the General tab:

General Timekeeper Settings Billing Parties Custom Fields

Group: None
Assign matter to a group. Groups are created in the Edit Client window.

When Invoicing: Include all matters

☐ Lock This Matter with a Password

Password:
Confirm:

Cancel OK

NOTE: Percentage Discounts applied to a master matter will only apply that single matter. To apply a Percentage Discount to multiple matters, add a Percentage Discount Slip to each individual matter.

Split Billing

Split Billing allows you to split one invoice between multiple parties responsible for payment. To use Split Billing, open the Matter, go to Matter Settings, then Parties:

Name	Role	% Responsible
This Client		50%
John Doe		50%

100% Paid

Adding Parties to a Matter

Add the parties responsible for billing. The field in the bottom right will help you ensure that the percentage breakdown adds up to 100%.

Now, when invoicing for this Matter, the invoice will be generated for each party responsible for billing, with their amount due shown.

When applying payments to Split Invoices, use the From field to fill in who the payment was from. This will keep track of which party owes how much should you re-issue the invoice or bill again with a balance forward.

Applying Payments to Split Billing Invoices

When applying any payments to an invoice with Split Billing, **be sure to enter the party's name in the From field of the Payment Center.** See the **Payment Center** section for more info.

Joint Billing by Task Code

If you'd like to create a client invoice across multiple matters for a specific Task Code (Task Code Module required), you can use the Create Invoice by Task Code option.

Open the matter that you'd like to create the invoice for (this will be the master matter for this joint invoice). The invoice will include task code slips from all matters, but will be created on this matter. You can re-issued and cancel the invoice from this matter.

From the Matter window, select the Create Invoice by Task Code... option. Here you can set the task code to invoice for, as well as an optional date filter to only bill slips that fall within the date range. You can also enter the invoice number, date, and due date.

Next, check the matters that you'd like to include in this joint invoice, and then click Create. Your joint task code invoice will be created.

LEDES98B Billing

TimeNet Law can generate invoices in LEDES98B format for E-Billing. You must use the Task Code Module to enter your slips using the Universal Task Based Management System (UTBMS). In order to use the LEDES98B format, you must do several things.

1. Enter your Law Firm ID in Preferences under Identity.
2. Use Task Code Billing for your client or matter.
3. Enter a Client ID for your client in the Client Info window.
4. Enter the Law Firm Matter ID and Client Matter ID in the Matter Settings under LEDES.
5. Make sure your Timekeepers all have proper IDs and Positions set.

Once you've completed these steps, you can select LEDES98B as an option when generating invoices. TimeNet Law will generate a LEDES98B file that can be used with any E-Billing system that supports LEDES98B.

About Late Fees

TimeNet Law can automatically add late fees to your invoices. Late Fee settings can be configured globally (Preferences > Billing > Options Tab) or per client (Client Settings > Billing Tab).

A bill ages every time a set number of days passes and the invoice remains unpaid. Each time the bill ages, the late fee is applied, which is calculated as a percentage of the bill's original total (principal amount). **Late fees are not compounded.**

When an invoice is overdue, you will be notified that a late fee has been applied to the invoice. The invoice's balance will be internally updated automatically when the invoice becomes overdue.

If you do not wish to charge late fees, be sure the Late Fee % setting is set to 0.

Configuring Late Fee Settings

Overdue After [] Days

Applies a late fee to any invoice when it ages. The late fee is a % of the original invoice total. For example, to charge a 10% late fee per annum, set Overdue After to 30 days, and the Late Fee to 0.833.

Late Fee %

The amount of the bill's original total to charge for the late fee.

Label

How the late fee is labeled on invoices.

Editing Late Fees

Once a late fee is added, the amount of the late fee is hard-coded into the invoice's total. Changing the late fee settings will not affect pre-existing late fees. To edit late fees, open the matter containing the invoice(s) with late fees. Select Matter > Edit Invoice Late Fees from the menubar.

You will see a list of invoices, along with the number of late fees that have been applied to each invoice, and the date that the last late fee was applied. Double-click a column to edit it. Remember that you can use Command+D to insert the date into the Date column, as well as typing in "yesterday" or "today".

Click OK to save the changes, and the late fees will be re-calculated on the invoice's total, **using the program's current Late Fee % setting.**

More About Invoices

Re-Issuing Invoices to Show Payments & Late Fees

Once an invoice has been created, you may wish to re-issue it to show new activity on the invoice since the time of invoicing, for example new payments or late fees. Re-issuing an invoice will simply reprint the existing invoice, with the same fees and expenses and the same due date, but will show any new activity at the bottom, as well as an updated balance.

To re-issue an invoice, open the Matter that contains the invoice, click the Invoices toolbar button in the right-hand side of the Matter window, and the Invoices Drawer will slide out. This is a list of all invoices for this Matter. Select one and right-click or control+click on it (or use the Action button that looks like a gear wheel) to bring up the contextual menu. Here you will see several options, one of which is “Re-Issue Invoice”.

Canceling an Existing Invoice

To Cancel and Invoice, either use the Invoices pane in the Billing Center, or open the Matter that contains the invoice, click the Invoices toolbar button in the right-hand corner of the Matter window, and notice the drawer that slides out. Find the appropriate invoice in either list, select it and right-click or control+click on it (or use the Action button that looks like a gear wheel) to bring up the contextual menu. Here you will see several options, one of which is “Cancel Invoice”.

Adding or Removing Slips to an Existing Invoice

After an invoice has been generated, you can attach or detach Slips to that invoice without recreating it. To remove Slips from an invoice, simply open the Matter with that invoice, select the green Slip(s) that belong to an invoice, right-click or control+click them and select the option to “Set Selected Slips to Work in Progress”. To attach a WIP Slip to an existing invoice, follow the same instructions, but select the option to attach the Slip to an invoice.

The Billing Center

The Billing Center is where you view balances and generate Statements for clients, bulk-invoice Work in Progress Slips, view all invoices, apply payments to them, or cancel them, and run the Automatic Bookkeeper.

Billing Center

One Click BillingClient StatementsInvoicesAutomatic Bookkeeper

Below is a list of all Client balances. Clients in red have Trust and/or Escrow Account balances below their required minimum.

Client	Balance Due	Trust Balance	Escrow Balance	UAC Balance	New Payments
<input checked="" type="checkbox"/> ACME Company, Inc.	\$2,506.53	\$7,336.70	\$6,949.00	500.00	4,365.50
<input type="checkbox"/> Bob Boldger	\$0.00	\$115,222.00	\$0.00	0.00	2,535.00
<input type="checkbox"/> Dynasty Recordings LLC	\$0.00	\$0.00	\$0.00	5,001.50	0.00
<input checked="" type="checkbox"/> Greg Newcastle & Associates	\$3,540.00	\$0.00	\$0.00	0.00	0.00
<input checked="" type="checkbox"/> Holt Construction Initiative	\$795.00	\$1,440.00	\$0.00	0.00	0.00
<input checked="" type="checkbox"/> Janetta Marsh	\$2,245.00	\$0.00	\$0.00	0.00	1,000.00
<input type="checkbox"/> Johnny Davis	\$0.00	\$0.00	\$0.00	0.00	0.00
<input checked="" type="checkbox"/> Michael Smith	\$102.00	\$0.00	\$0.00	3,796.00	0.00
<input checked="" type="checkbox"/> Mike Rowe	\$13,330.00	\$5,000.00	\$0.00	0.00	0.00
<input type="checkbox"/> Primatech Paper Co.	\$0.00	\$0.00	\$0.00	0.00	0.00
<input checked="" type="checkbox"/> Sandra Ramero	\$2,196.00	\$0.00	\$0.00	0.00	0.00
<input checked="" type="checkbox"/> Vanessa Litro	\$2,442.00	\$4,500.00	\$5,000.00	0.00	0.00
<input checked="" type="checkbox"/> ZBS Broadcasting Company	\$8,019.64	\$0.00	\$0.00	0.00	0.00

9 of 13 Clients selected

Total of Selected Balances: \$35,176.17

Generate Statements for Selected Clients

Viewing Client Balances and Generating Statements

The Client Statements section is where you can see all outstanding balances per client, and if any client's Trust or Escrow Account balance is below their required minimum. If a balance is due or a replenishment is required, then you can quickly generate a Statement to send to that client.

The Billing Center (continued)

One Click Billing

The One Click Billing section shows you all Matters with unbilled Slips. These Matters can be invoiced all at once, and invoices are generated in exactly the same way as invoicing in a Matter window. The only difference is instead of selecting exactly which Slips will be included on the invoices, **all unbilled slips are included by default**.

You can use a date filter to only include unbilled slips from a specific time period as well. Right-click (control+click) anywhere in the window to quickly set a date range. You may also use the date range set keyboard shortcuts shown in the menu. The ⌘ symbol is for the Option key.

A screenshot of a software menu titled "Filter Items by Date Range". The menu is divided into two sections. The top section has a light gray header and contains two items: "This Month" with a keyboard shortcut of ⌘T and "Last Month" with a keyboard shortcut of ⌘L. The bottom section has a white header and lists the twelve months of the year, each with a keyboard shortcut starting with ⌘ followed by a number or symbol (e.g., ⌘1 for January, ⌘- for November, ⌘= for December).

Filter Items by Date Range	
This Month	⌘T
Last Month	⌘L
January	⌘1
February	⌘2
March	⌘3
April	⌘4
May	⌘5
June	⌘6
July	⌘7
August	⌘8
September	⌘9
October	⌘0
November	⌘-
December	⌘=

The Auto Set Date Range Popup

Clients with No New Activity

By default, One Click Billing will also include any Matters that have no new unbilled Slips, but still have an existing balance. The last invoice for these matters will be automatically Re-Issued with the current date, so that when One Click Billing is finished, your billing is done!

Automatic Bookkeeper

Your Automatic Bookkeeper rules will be applied to invoices as they are created with One Click Billing. See the **Automatic Bookkeeper** section for more info.

Viewing Invoices, Applying Invoice Payments and Canceling Invoices

The Invoices section shows you all invoices in your database. From here, you can easily apply a payment to an invoice, or cancel an invoice by right-clicking, control+clicking, or using the Action button. Invoices will be highlighted in red if they are overdue.

The Billing Center (continued)

Using The Automatic Bookkeeper

The Automatic Bookkeeper will first check to be sure that you have selected the Automatically Apply Payments option in the Billing Preference pane or one or more clients has customized Automatic Bookkeeper rules to Automatically Apply Payments. It will then check to see if any Matters that should automatically apply payments have invoices with a balance greater than 0.

If the Automatic Bookkeeper finds qualifying invoices, they will be listed in the Automatic Bookkeeper Window.

Select which Matters you want to apply the payments to. The lower-right corner will show the total of the selected Matters. If a Matter is **highlighted in red** it means that the balance of that Matter is higher than the available balance in the primary fund. Backup funds will need to be taken out, or the primary fund will be depleted leaving the remainder of the balance left on the invoice.

Selecting an item from the list will also show that client's available balance in their primary fund in the lower-left corner of the window.

Click the Apply Payments to Selected Invoices button to run the Automatic Bookkeeper. After it runs, the window will change to show you an overview of what the Automatic Bookkeeper has done. This will show you exactly which clients were able to pay out of their fund accounts, how much was taken out of each client's fund account, and the total that was withdrawn from Trust accounts and Escrow accounts. If you have one Trust or Escrow bank account for all clients, this total will tell you how much to withdraw from that account to cover all payments.

Payments and Retainers: The Payment Center

ACME Company, Inc.

Bob Boldger

Dynasty Recordings LLC

Greg Newcastle & Ass...

Holt Construction Initi...

Janetta Marsh

Johnny Davis

Michael Smith

Mike Rowe

Primatech Paper Co.

Sandra Ramero

Vanessa Litro

ZBS Broadcasting Co...

Payment Center

Vanessa Litro

Balance: \$2,442.00

Trust

\$4,000.00

No Minimum

Escrow

\$5,000.00

No Minimum

UAC

\$0.00

Matter List

All Groups

Inactive Matters

Matter Num^	Matter Name	Balance	Trust	Escrow	UAC
ALL MATTERS					
VL-101	Wrongful Termination	\$2,442.00	\$500.00	\$0.00	\$0.00

Matter Trust

\$500.00

Matter Escrow

\$0.00

Matter UAC

\$0.00

Apply or Deposit Payments

View & Delete Payments

Payment:

Select Type of Payment

Notes:

Date:

1/21/19

Amount:

From:

Optional

•	Invoice #	^	Date	Fees	Expenses	Balance	Amt to Apply
<input type="checkbox"/>	VL-7574		9/8/17	\$2,035.00	\$0.00	\$2,442.00	\$2,442.00

Total of Checked Invoices: \$0.00

Apply Payment

Show Inactive Clients

Anytime payments are recorded into TimeNet Law, you will use the Payment Center:

Payment Center Overview

Client List

A list of your clients appears on the left side in the light blue box. Select the client you wish to work with.

Client Information

The top of the window will show the client name, A/R balance, and the balance in Client Trust, Escrow, and Unapplied Credits (general retainer).

The Payment Center (continued)

Matter List

Below that is a list of Matters associated with the client. To view payment history and retainer deposits for all matters, be sure ALL MATTERS is selected in the listbox. To view a specific matter, select it from this listbox. You can use the Groups Popup above the matter list to filter which group of matters you want to see.

Retainer Accounts Overview

TimeNet Law gives you three retainer accounts at the client level — these accounts can be used by any matter under that client. You also get three retainer accounts for each matter — these accounts can only be used by that individual matter.

All three accounts behave identically, and the labels that are associated with each account can be customized in TimeNet Law's Preferences window. The account types are as follows:

- * Trust Account
- * Escrow Account
- * Unapplied Credits Account (this is your “general retainer” account)

Depositing Funds into a Retainer

1. If you wish to deposit the funds into a matter level retainer account, be sure the matter is selected in the matter list.
2. Under the “Apply or Deposit Payments” tab, enter the payment details, starting with the Type of Payment. In order to deposit funds into a retainer, the Type must be Check, Wire, Credit Card, Cash, or Other.
3. Be sure you've entered the payment details (check #, wire #, etc), the correct date of the payment, and the amount of the payment.

Leave any invoices appearing in the invoice list at the bottom unchecked, and click the Deposit button at the bottom-right of the window.

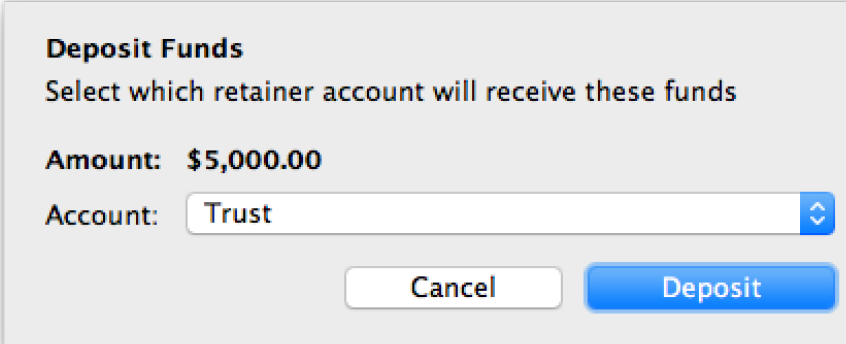
Because you haven't checked any invoices to apply this payment to, you will be prompted to deposit the funds into a retainer account.

To apply the payment to invoices, you would check them off in the invoice list. There will be more information on applying payments to invoices in the next section.

When prompted, select the retainer account you'd like to deposit the funds into, and click Deposit.

The Payment Center (continued)

Note you will only see matter level accounts in the popup menu when you have an individual matter selected in the Payment Center's matter list.

A light gray dialog box titled "Deposit Funds" with a subtitle "Select which retainer account will receive these funds". It displays "Amount: \$5,000.00" and "Account: Trust" with a dropdown arrow. At the bottom are "Cancel" and "Deposit" buttons.

Deposit Funds
Select which retainer account will receive these funds

Amount: \$5,000.00

Account: Trust

Cancel Deposit

Applying Funds to a Client Level Trust Account

Viewing and Deleting Retainer Deposits

To view client level Trust, Escrow and Unapplied Credits transactions, click the green button below the retainer label. This will show you all deposits and withdrawals made to this account. To view matter level Trust, Escrow and Unapplied Credits transactions, click the green button below the matter retainer label underneath the matter list.

Once the payment has been applied for the checked invoice(s), there may be leftover funds from the payment. If so, you will be prompted to deposit the remainder into a retainer account.

The screenshot shows a software interface for applying payments. At the top, there are two tabs: 'Apply or Deposit Payments' (selected) and 'View & Delete Payments'. Below the tabs, the following fields are visible:

- Payment: Check
- Check No: 127
- Date: 5/6/14
- Amount: 6500
- From: Optional

A table lists the invoices being applied to:

Invoice #	Date	Fees	Disb	Balance	Amt to Apply
✓ PPC-1209	4/30/14	\$0.00	\$1,150.00	\$1,150.00	\$1,150.00
✓ PPC-1241	5/6/14	\$1,125.00	\$75.00	\$1,200.00	\$1,200.00

Below the table, the following summary is shown:

- Total of Checked Invoices: \$2,350.00
- Amount Left: \$4,150.00

An 'Apply & Deposit Payment' button is located at the bottom right of the window.

Applying a \$6,500.00 Check (No. 127) to two invoices — you can then deposit the remaining \$4,150 Into a retainer

The Payment Center (continued)

Applying a Retainer Deposit to an Invoice Balance

1. From the matter list, select the matter that contains the invoice(s) to pay off. Or, to see a list of all matter invoices, select ALL MATTERS.
If applying the payment from a matter level retainer, be sure the correct matter is selected.
2. Under the “Apply or Deposit Payments” tab, notice the “Pay or Withdraw from” options. Select the one corresponding to the retainer account you’d like to pay from. For example, “Pay or Withdraw from Trust”.
3. You will see a list of deposits made to the selected retainer account. Select the deposit you’d like to use. To the right, enter the date and amount of the payment.

By default, the new payment to be applied will have the same payment type and details (for example check #123) as the original deposit. You can override this with a new payment type and detail. Click the text or the pencil/edit button below the amount field where it shows the payment type and detail to override it.

Check off the invoice(s) you want to apply the retainer to. **By default, the pay-off amount for each invoice will be the full balance.** You can override the amount to short-pay an invoice by double-clicking the Amt to Apply column and entering the new amount.

Click the Apply Payment button in the lower-right of the window.

The screenshot shows a software window titled "Apply or Deposit Payments" with a sub-tab "View & Delete Payments". The "Payment:" dropdown is set to "Pay or Withdraw from Trust". Below this, the "Pull From:" section shows a table with columns "Type", "Details", "Amt Left", and "From". It lists a "Check" for "197" with an "Amt Left" of "\$890.00". To the right of this table, there is an "Apply to Invoice" dropdown, a date field set to "11/25/15", and a large green amount field showing "\$890.00". Below the date and amount fields, it says "Check #197" with an edit icon. The main part of the window is a table with columns: "Invoice #", "Date", "Fees", "Expenses", "Balance", and "Amt to Apply". It lists two invoices: "ACME-03" (checked) and "ACME-243" (unchecked). Below the table, there is a checkbox for "Total of Checked Invoices: \$5,689.01" and a green text label "Amount Left: \$0.00". A blue "Apply Payment" button is in the bottom right corner.

Invoice #	Date	Fees	Expenses	Balance	Amt to Apply
<input checked="" type="checkbox"/> ACME-03	5/19/15	\$4,818.21	\$870.80	\$5,689.01	\$890.00
<input type="checkbox"/> ACME-243	11/25/15	\$1,400.00	\$0.00	\$1,400.00	\$1,400.00

☐ Total of Checked Invoices: \$5,689.01
Amount Left: \$0.00

Paying off an invoice from a trust retainer deposit

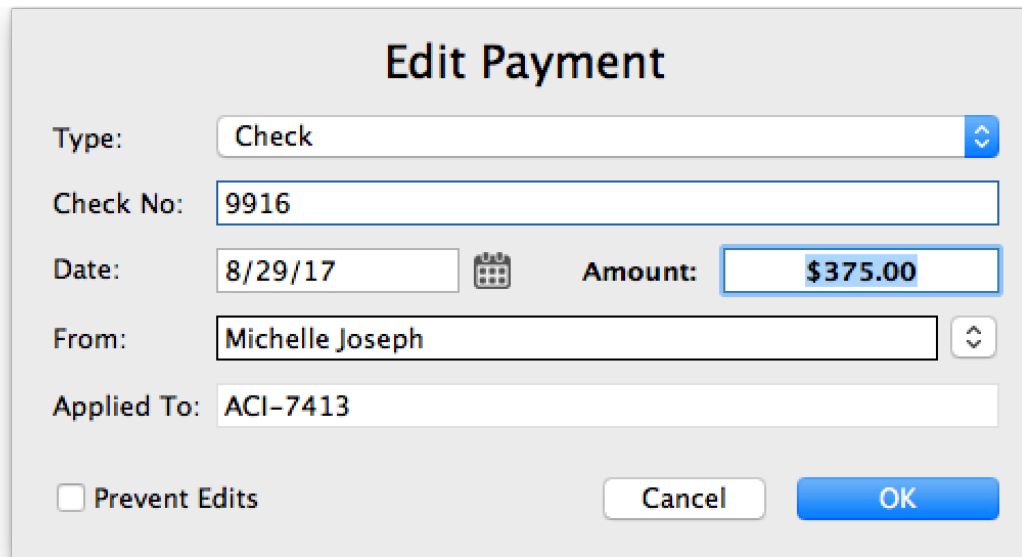
The Payment Center (continued)

Viewing and Deleting Invoice Payments

To view or delete existing payments, click the View & Delete Payments tab. Select payment(s) in the list and hit the delete key on your keyboard, or the delete button — at the bottom of the payments list to delete them.

Editing Invoice Payments and Retainer Deposits

To edit an existing payment or retainer deposit, click the View & Delete Payments tab or click the green retainer button to find the deposit/payment. Then, uncheck the Prevent Edits checkbox in the lower-left. This will always be checked at first, as a failsafe to prevent accidental payment edits.

A screenshot of the 'Edit Payment' dialog box. The title is 'Edit Payment'. It contains several fields: 'Type' is a dropdown menu set to 'Check'; 'Check No:' is a text box with '9916'; 'Date:' is a date picker showing '8/29/17'; 'Amount:' is a text box with '\$375.00'; 'From:' is a dropdown menu set to 'Michelle Joseph'; and 'Applied To:' is a text box with 'ACI-7413'. At the bottom left is a checkbox labeled 'Prevent Edits' which is currently checked. At the bottom right are two buttons: 'Cancel' and 'OK'.

Editing a payment made to an invoice

Be very careful when editing payments. It is possible to end up with negative invoice balances or negative retainer balances, which can cause issues with the TimeNet Law Database.

Only edit payment amounts when you're absolutely sure that the edit won't cause any negative balances in the system.

The Payment Center (continued)

Applying Write Offs to Invoices

Applying a Write Off is exactly the same process as applying a payment. Just be sure to choose “Write Off” for the Payment Type. Then enter in a write off reason (optional), the write off date, the amount to be written off, and select the invoice(s) to write off.

Refunding (Withdrawing) Funds from a Retainer

To withdraw funds from a retainer, use the Payment Type popup to select the “Pay or Withdraw from” option pertaining to the account you want to withdraw from. Then select an available deposit, click the “Apply to Invoice” popup and change it to “Withdraw”. Enter the amount and date of the withdrawal, override the payment details if you’d, and click Withdraw.

The screenshot displays the 'Payment Center' interface with two tabs: 'Apply or Deposit Payments' (active) and 'View & Delete Payments'. The 'Payment:' dropdown is set to 'Pay or Withdraw from Trust'. Below this, the 'Pull From:' section contains a table with the following data:

Type	Details	Amt Left	From
Check	197	\$890.00	


To the right of the table, there is a 'Withdraw' button, a date field set to '11/25/15', and a green amount field showing '\$890.00'. Below these is a 'Check #197' label. At the bottom left, the 'Notes:' field contains the text 'Case has ended, funds returned to client.' A large blue 'Withdraw' button is located at the bottom right of the form.

Refunding money from the trust account

The Payment Center (continued)


Transferring from client level retainers to matter level retainers

Sometimes you'll deposit funds into a matter retainer account, and want to move those funds up to the client level retainer account (or vice versa). TimeNet Law makes this easy:

Select the Matter you'd like to transfer funds from or to in the matter list. Next, click the Transfer Funds button  next to the green button that shows the balance of the account you want to transfer from. Then select your transfer destination from the popup menu.

Select a Deposit to Transfer From

Type	Details	Amt Left	From
Check	512	\$4,000.00	

Transfer Date: 9/3/16  Transfer Amt: \$1000

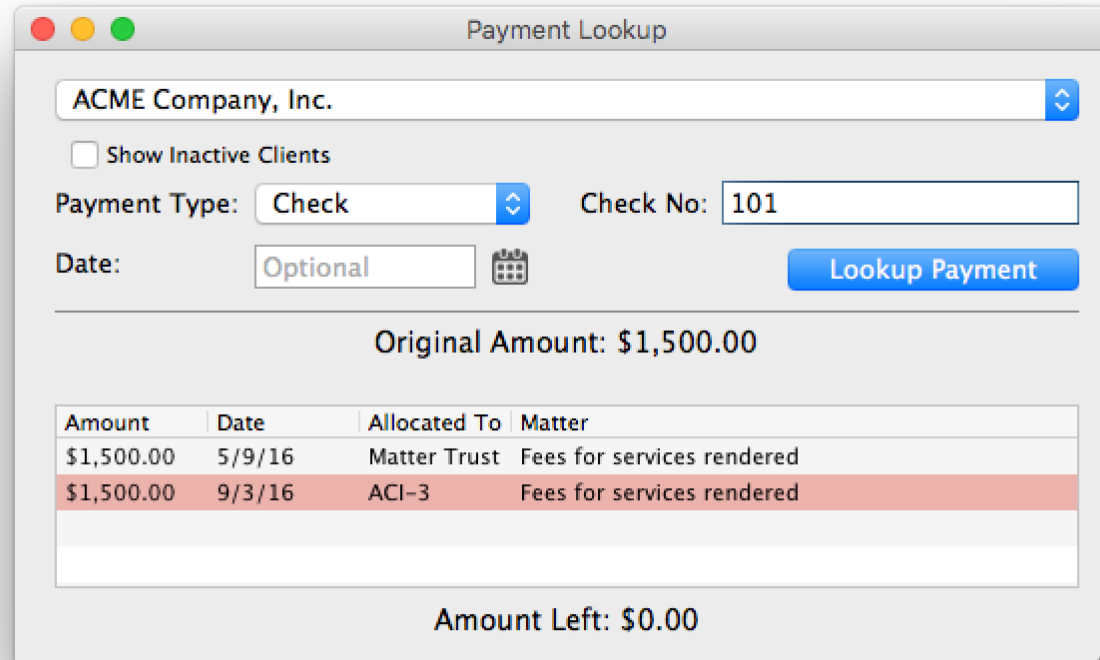
Transfer \$1,000.00 from Client Trust to Matter Trust

Cancel Transfer

Transferring Funds from client level trust to matter level trust

Quickly Looking Up a Payment

If you need to look up information about a payment quickly, select Edit > Lookup Payment (§L). Select the Client, enter some payment details, and click Lookup Payment.



The screenshot shows a 'Payment Lookup' window with the following fields and data:

- Client: ACME Company, Inc.
- Show Inactive Clients: ☐
- Payment Type: Check
- Check No: 101
- Date: Optional
- Lookup Payment button
- Original Amount: \$1,500.00
- Table with 4 columns: Amount, Date, Allocated To, Matter
- Amount Left: \$0.00

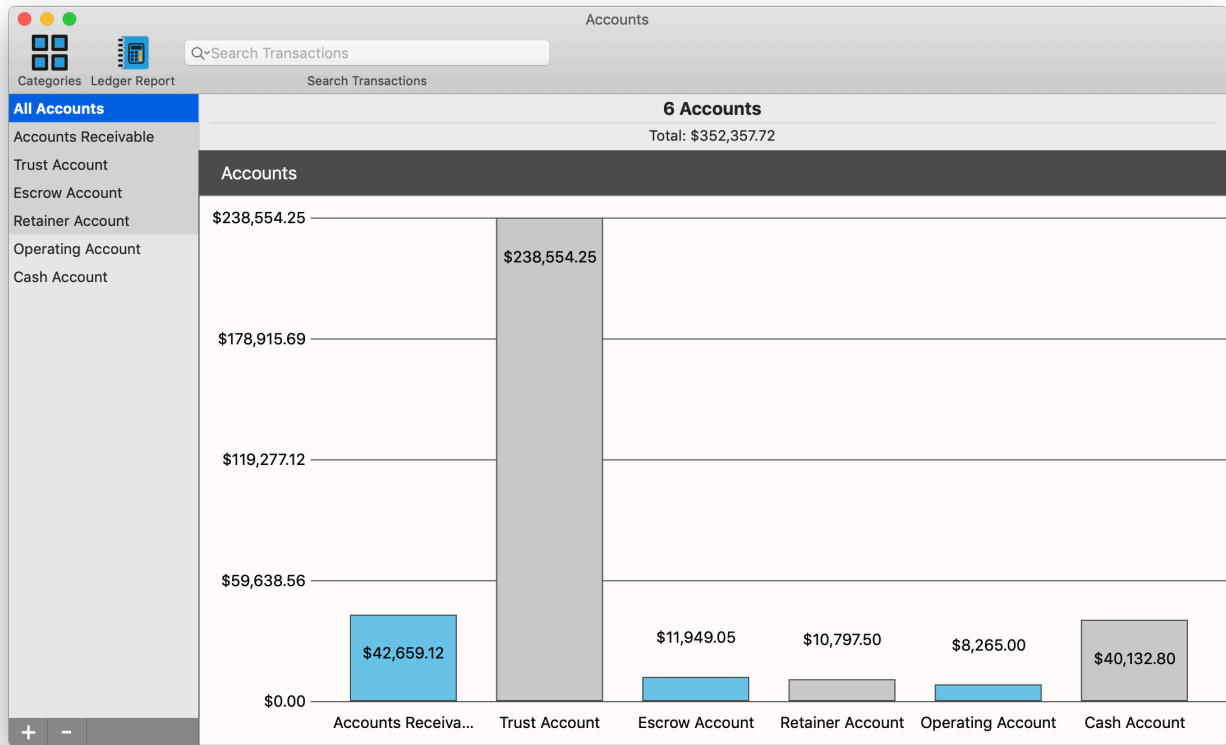
Amount	Date	Allocated To	Matter
\$1,500.00	5/9/16	Matter Trust	Fees for services rendered
\$1,500.00	9/3/16	ACI-3	Fees for services rendered

The Lookup Payment function will show the total amount of the original payment, how it was distributed (if at all) to Client-level and Matter-level retainer accounts, how it was applied to invoices, and the amount left (if any). **Getting this information quickly is critical when a client calls in with questions about a payment.**

General Ledger Accounting

The Accounting Center

TimeNet Law allows you to keep track of general accounting, such as operating accounts, payroll, expenses, and revenue. *Requires the Accounting Module.* Click the Accounts button in the main window’s toolbar, or select Accounts from the Window menu to open the Accounting Center.



TimeNet Law’s Accounting Center shows a graph of your account balances and a full total at the top

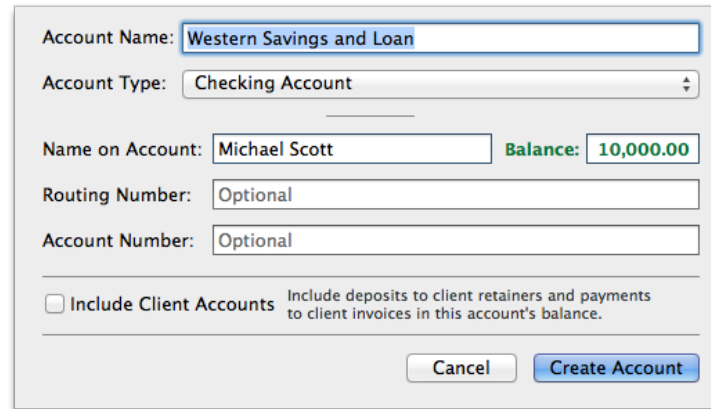
The Accounting Center automatically creates an Accounts Receivable account, and accounts for each retainer that you’re using in the system. Click an account on the left to see transaction details.

The Accounting Center also lets you automatically link client accounting to any of your internal accounts. This way, any payments made by clients are automatically reflected in your internal accounting.

General Ledger Accounting (continued)

Adding Accounts

Click the New Account button, or the + button in the lower-left of the window to add a new account:



Account Name:

Account Type:

Name on Account: Balance:

Routing Number:

Account Number:

☐ Include Client Accounts Include deposits to client retainers and payments to client invoices in this account's balance.

Enter the name of the account, the type, the name on the account, the starting balance of the account, and routing and account numbers where applicable.

If you want client accounting linked to this internal account, check the box to Include Client Accounts. With this option on, all deposits to client retainers and payments made to client invoices will be reflected in this account automatically.

Once you've created one or more accounts, you can categorize transactions (deposits and withdrawals), make transfers from one account to another, and generate Ledger Reports in PDF or CSV format.

Viewing Accounts

Click the account you'd like to view in the left-hand accounts list. You will then see the balance for this account, and all itemized transactions. If Client Accounts are included, you will see all client transactions listed under this account as well, but you cannot delete or edit client transactions from the Accounting Center. You will use the Payment Center to apply or delete payments and deposits for your clients, as detailed earlier in this manual.

Reports

TimeNet Law has many powerful Reports to keep you on top of what and how your firm is doing. These can be accessed from the Reports menu as seen below:

One Click Billing Summary	⇧ ⌘ B
Statement of Account Overview Report	⇧ ⌘ O
Statement of Account Report	⇧ ⌘ A
Revenue Allocation Report	⇧ ⌘ V
Aged A/R Report	⇧ ⌘ R
Aged Work in Progress Report	⇧ ⌘ W
Credit Allocation Report	⇧ ⌘ P
Payments Received Report	⇧ ⌘ Y
Retainer Funds In and Out Report	⇧ ⌘ H
Ledger History Report	⇧ ⌘ L
Net Investment Report	⇧ ⌘ N
Tax Report	^ ⌘ T
Client Report	⇧ ⌘ C
Timekeeper Report	⇧ ⌘ T
Slip Report	⇧ ⌘ S
Monthly Report	⇧ ⌘ M
Billed Fees and Expenses Report	⇧ ⌘ B
Unbilled Fees and Expenses Report	⇧ ⌘ U
Invoice Summary Report	⇧ ⌘ I
Billing Hold Report	⇧ ⌘ E
Trust Funds Report	⇧ ⌘ T
Escrow Funds Report	⇧ ⌘ E
Unapplied Credits Report	⇧ ⌘ U
Conflict Report	⇧ T

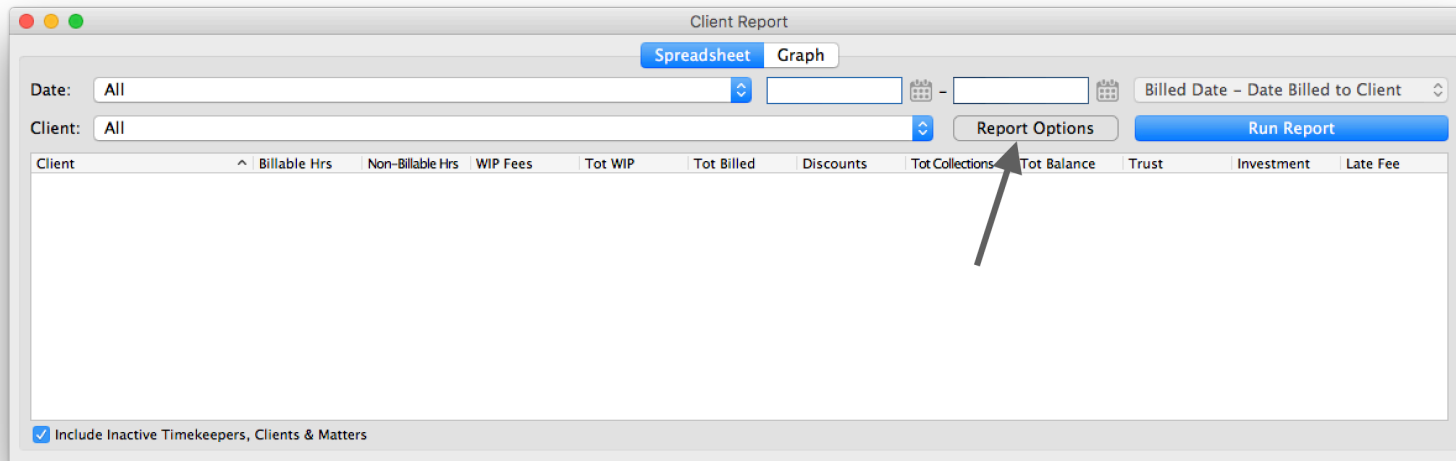
TimeNet Law's Reports can be found under the Reports Menu

Reports (continued)

Build and Save Custom Reports

The Client Report allows you to hide or show over 28 different columns of information. **Double-click any column to see the figures broken down by matter.** The report can be filtered by date, client, and client category. Once you've dialed in your settings for the report, you can save it for quick access later.

Use the Report Options button to customize your columns, save the report, or edit existing report presets. Many other reports allow you to build and save report presets as well.



Customizing the Client Report

Billed Date goes by the date items were billed. EXAMPLE: items **dated** January but **billed** in February will be included in February, but not January.

Entry Date goes by the date items were entered. EXAMPLE: items **dated** January but **billed** in February will be included in January, but not February.

Reports (continued)

Report Breakdown View by Matter

Many reports allow you to double-click a column to see a breakdown of that amount. For example, in the Client or Timekeeper Report, double-click a column in the report to see a breakdown of that amount by matter. In the Timekeeper report, you can double-click a column in the TOTAL row to see a breakdown by matter for all Timekeepers.

Tracking Revenue Allocation/Origination

TimeNet Law allows you to assign a percentage of revenue to be allocated to your Timekeepers, useful for tracking origination. You can set Revenue Allocation at the client level or matter level.

Any unused allocation will go back to The Firm. For example, if Timekeeper A has a 40% revenue allocation, and Timekeeper B has a 10% revenue allocation, the remaining 50% will go back to The Firm.

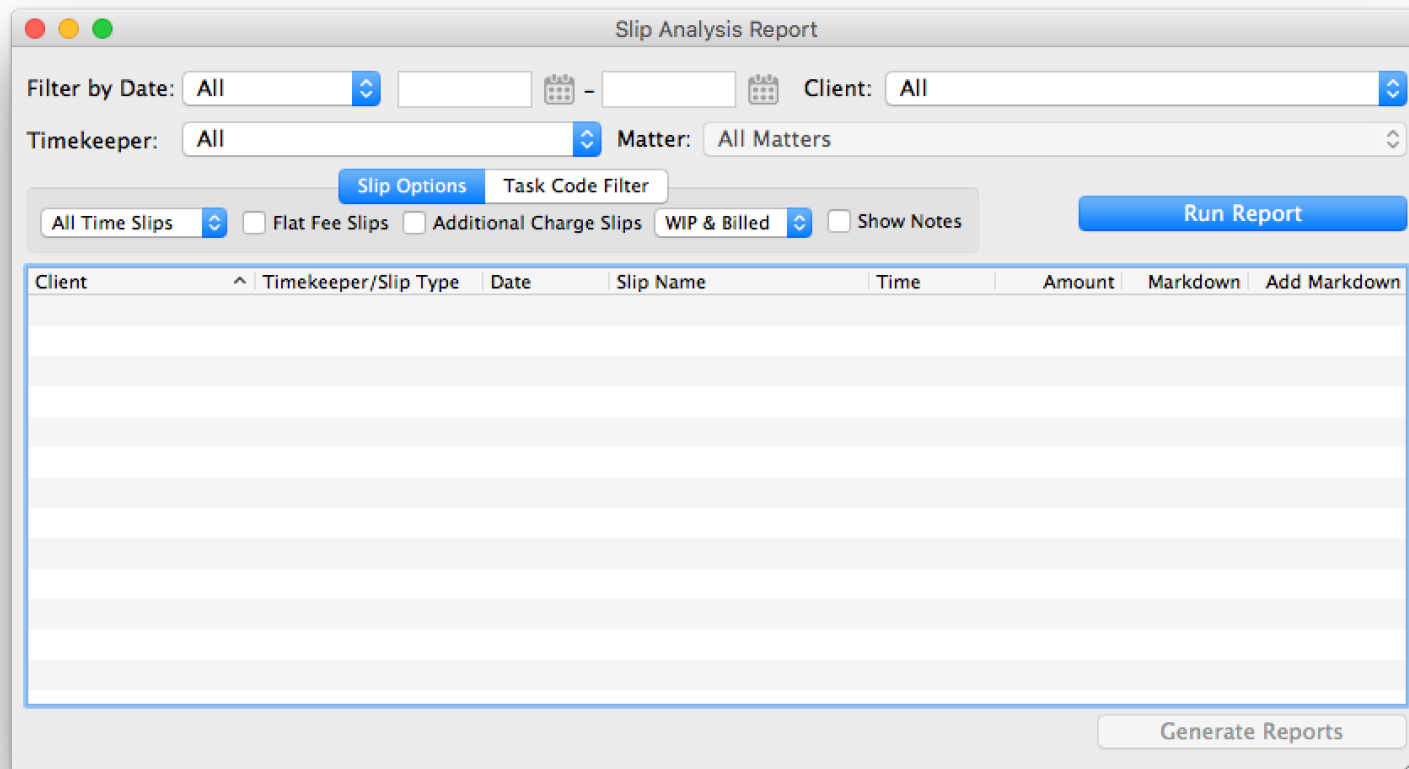
Running a Revenue Allocation Report will show you how much each timekeeper's revenue allocation is, as well as what The Firm's allocation is, and the total revenue brought in. You can use a date filter to only count revenue from a specific time period, and you can also view a chart of revenue broken down by Timekeepers and The Firm.

The Revenue Allocation Report will ignore any matters not using revenue allocation.

Bulk-Applying Markdowns to Slips with the Slip Analysis Report

If you'd like to apply markdowns to a large number of slips, you can use the Slip Analysis Report. When using this report, you can filter with a date range, a specific client, a specific matter, specific slip types, and specific task codes.

Once you've set the report settings, click the Run Report button. Any WIP (unbilled) time slips will allow you to enter an amount into the Add Markdown column. Once you've entered the markdowns to be made, you can click the Apply Markdown to Slips button to process your markdowns.



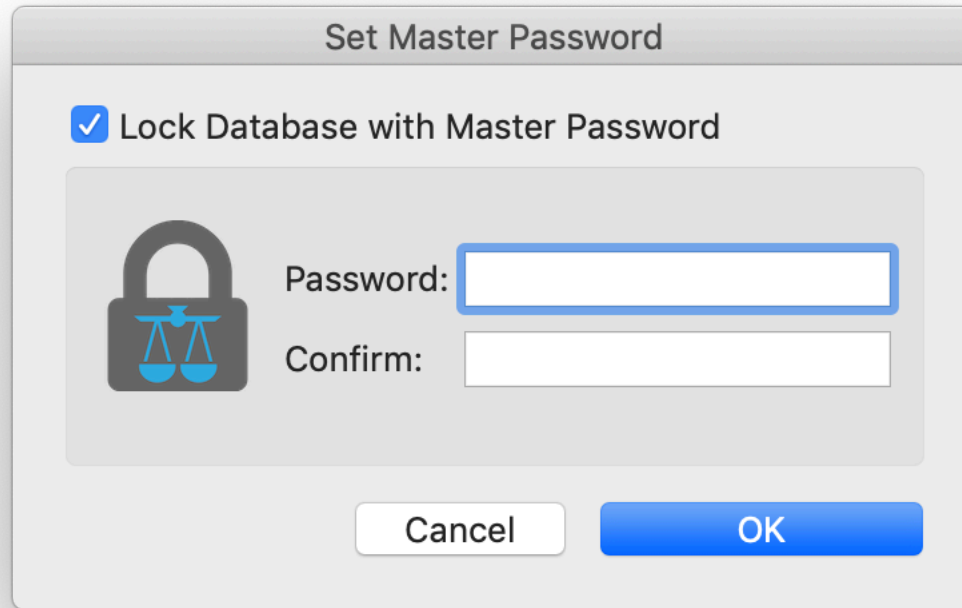
The screenshot shows the 'Slip Analysis Report' window. At the top, there are filters for 'Filter by Date' (set to 'All'), 'Client' (set to 'All'), 'Timekeeper' (set to 'All'), and 'Matter' (set to 'All Matters'). Below these are tabs for 'Slip Options' and 'Task Code Filter'. Under 'Slip Options', there are checkboxes for 'All Time Slips' (selected), 'Flat Fee Slips', 'Additional Charge Slips', 'WIP & Billed' (selected), and 'Show Notes'. A 'Run Report' button is located to the right of these options. Below the filters is a table with the following columns: Client, Timekeeper/Slip Type, Date, Slip Name, Time, Amount, Markdown, and Add Markdown. The table is currently empty. At the bottom right of the window is a 'Generate Reports' button.

Client	Timekeeper/Slip Type	Date	Slip Name	Time	Amount	Markdown	Add Markdown
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The Slip Analysis Report Shows You a Full Summary of All Slips in TimeNet Law

Locking Your Database with a Master Password

You can lock your TimeNet Law Database with a password by selecting the Set Master Password option in the TimeNet Law Application Menu.

A screenshot of a 'Set Master Password' dialog box. The title bar says 'Set Master Password'. Inside, there is a checked checkbox labeled 'Lock Database with Master Password'. Below this, there is a gray rectangular area containing a padlock icon with a scale of justice inside it. To the right of the icon, there are two text labels: 'Password:' and 'Confirm:'. Each label is followed by a white text input field with a blue border. At the bottom of the dialog, there are two buttons: a white 'Cancel' button and a blue 'OK' button.

Setting a Master Password in TimeNet Law

Do not forget your password as it is impossible to recover. Manual data recovery will be required by AppleSource Software. Your identity must then be verified for security purposes.

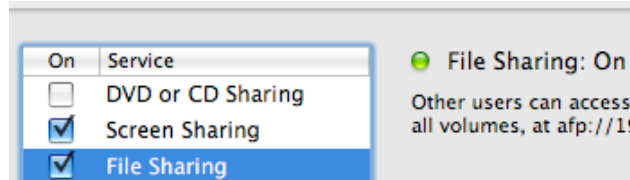
Restricting User Permissions and Logging User Changes for Auditing

You can assign user permissions and track all changes made in TimeNet Law by user with the TimeNet Law Control Center, a separate administration package offered for use with TimeNet Law in networked environments.

Networking with TimeNet Law

TimeNet Law makes it very simple to share data across a wireless or wired network. Configuring your computers to allow TimeNet Law to share data requires no software other than built-in OS X components.

1. On the machine that will host the TimeNet Law data, open System Preferences under the Apple menu
2. Click the Sharing icon
3. In the list of sharing services on the right, be sure to enable File Sharing:



Enabling File Sharing in OS X's Sharing System Preferences Pane

4. Close System Preferences and **repeat the following steps on each computer that will connect to the data:**
5. Open TimeNet Law and choose Configure Network (⌘K) from the File menu
6. The Network Setup Assistant will be displayed. If it does not appear, then TimeNet Law is already trying to connect to a previously configured shared data folder. Hold down the Option key on your keyboard, click the File menu, and select Configure Network again.
7. Follow the instructions in the Network Setup Assistant to use TimeNet Law on your network.

TimeNet Law can use your local network or Dropbox. Dropbox allows you to view, edit, and sync changes to your database from anywhere in the world as long as you have an internet connection.



You'll Know TimeNet Law is in Networked Mode by the Main Window's Titlebar

Networking with TimeNet Law (continued)

When TimeNet Law is in Networked mode, changes made to Preferences, clients and Matters will be seen by everyone connected. When a change is made on one machine it will automatically update the connected machines in real time.

TimeNet Law will also remember to be in Networked mode and linked to that Networked Data Folder every time it is opened.

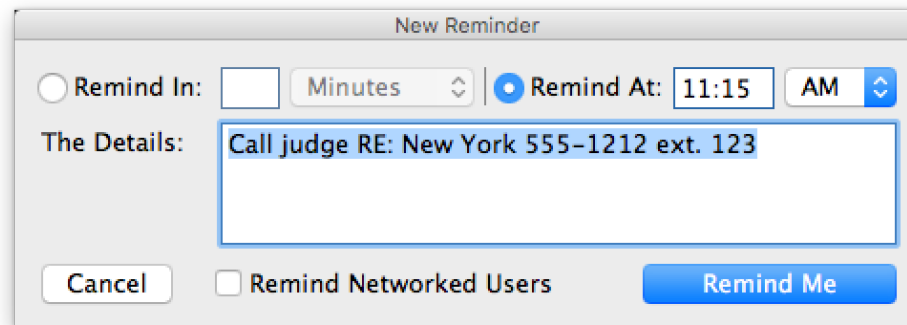
Resetting the Networked Data Folder

Sometimes TimeNet Law can't find the Networked Data Folder that has been previously set. This can happen if the file's path has changed, or the network is on a new machine. If for any reason when switching to Networked mode TimeNet Law gives you an error or simply seems stuck in Local mode, you can reset the Networked Data Folder using the following method:

Hold down the Option key on the keyboard and click on the File menu. Notice the Work On Network item has changed to say "Configure Network...". Select this to be presented with Network Setup Assistant. From here you can reconfigure TimeNet Law's network settings.

Using Reminders

Quickly create a Reminder and get back to work. TimeNet Law will help keep you on task. Reminders can also be sent to other people who have TimeNet Law on their computer.



New Reminder

☐ Remind In: Minutes | ☒ Remind At: 11:15 AM

The Details: Call judge RE: New York 555-1212 ext. 123

☐ Remind Networked Users

Creating a Reminder

Select **Window > New Reminder** (⌘5) or find the **New Reminder** option in the Menu Bar Widget.

Reminders will only be shown when TimeNet Law is open. If you quit TimeNet Law with reminders scheduled, you will be able to review them before confirming if you want to quit.

About TimeNet Law Data

TimeNet Law stores all settings, Client and Matter details in one folder named TimeNet Law Data.

You can find this folder at **~/Library/Preferences/TimeNet Law Data**.

The ~ Symbol (tilde) represents the home folder of the currently logged-in user in OS X. You can quickly get to your home folder by using the Finder window's sidebar or selecting Home (Shift+⌘H) from the Go menu in the Finder.

Data is stored in a **proprietary encrypted (AES-256bit) format** on your hard drive in the TimeNet Law Data folder. Information is stored locally and never sent over the internet or even a local network. Data is only shared using Apple File Sharing (AFP) among authorized users.

TimeNet Law uses invisible files to store some aspects of data. Because of this, it is extremely important that when backing up data or otherwise working with the data folder, you must copy the entire TimeNet Law Data folder, not just the file(s) within it.

Backing Up Your TimeNet Law Data

TimeNet Law is designed to run your entire law practice. It is critical to maintain backups of this data. Fortunately, there are a number of easy ways to do so.

- 1. Use Apple's Time Machine.** Time Machine makes hourly backups of your user folder, among other things, and as such will always have a current backup of your TimeNet Law Data folder.
- 2. Use the Backup Data... (⌘B) Command.** In the File menu of TimeNet Law there is a Backup Data... function. Select this and choose a save location for the TimeNet Law Data Backup folder.
- 3. Use the Auto Backup Feature.** In **Preferences > General > General Tab** you can configure Automatic Backup. By default, this is turned on and backups are stored in ~/Library/Preferences/TimeNet Law Data Backups. You can customize the location to have backups saved to Dropbox or another folder.

Transferring Your TimeNet Law Data to Another Machine

To transfer your data from one machine to another:

1. Locate the ~/Library/Preferences/TimeNet Law Data folder and make a copy of it to the network, thumb drive, CD-R, or another storage device.
2. Transfer the folder to the new machine.
3. Move the folder to ~/Library/Preferences where ~ is the home folder of the logged in user on the new machine.
4. Open TimeNet Law on the new machine. You should see all data carried over from the old machine now on the new one.

About TimeNet Law Data (continued)

License Information is not copied with the data. You will have to register TimeNet Law on the new machine using the license code provided to you at the time of purchase. You may use the same license code for 2 different machines as long as they will not be operating simultaneously in a networked environment.

Restoring From a Backed Up Data Folder

It's very easy to restore TimeNet Law from a backed up data folder. First, make sure all windows are closed except the Main window (the Main window can be closed as well). Next, choose Restore Data... from the File menu. Then, select a TimeNet Law Data folder and click Select. TimeNet Law will now rename the current TimeNet Law Data folder to have "~copy" at the end, and copy the selected folder to your ~/Library/Preferences folder and then reflect the restored data.

Reverting to an Older Version of TimeNet Law

If you see a "TimeNet Law Data ~old" or "TimeNet Law Data ~2.0" folder in ~/Library/Preferences this means that TimeNet Law has converted data from an earlier version's data structure. If you intend to revert back to the previous version of TimeNet Law, rename the "TimeNet Law Data" folder to "TimeNet Law Data ~new" and rename the "TimeNet Law Data ~old" folder to "TimeNet Law Data"

Resetting Your TimeNet Law License

If you've licensed your copy of TimeNet Law with a license code, TimeNet Law will be assigned to that code on that computer. If you've licensed multiple machines for TimeNet Law with the same code, you will be unable to use them simultaneously on a network. If you purchase an additional license code down the road, you will need to enter the second license into the software:

To reset the TimeNet Law License on a computer, open TimeNet Law on that computer. Select the License... option and enter in your new name/license code combination.

How To Contact AppleSource Software

If you have an idea for a new feature, or have found a bug, or just have a question regarding TimeNet Law, we'd love to hear from you. Here's how to get in touch with us:

Use our form online: <http://www.applesource.biz/support/index.html#send>

Email us directly: support@timenetlaw.com

Visit our support site: <http://www.applesource.biz/support.html>

For more information on TimeNet Law development, what's coming in new versions and prerelease information, check out the AppleSource Developer's blog: <http://www.applesource.us>

Purchasing TimeNet Law & Additional Modules

All orders can be made from our website: www.applesource.biz/software/timenet-law/pricing.html

TimeNet Law is provided as a digital download. We do not ship a physical product. The full version of TimeNet Law is always available on our website at <http://www.timenetlaw.com> in demo form.

Once you've downloaded the demo, you can unlock it with a license code. This is what will be emailed to you upon purchase.

Appendix A. Credits

TimeNet Law is © 2020 AppleSource Software

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Appendix B. Legal Notice

Initial Information

TimeNet Law is distributed "as is", and offers no warranties. The author of this software (Perry Fjellman) takes no responsibility for any damage, coincidental or not, that may be caused by the use or misuse of this product. This software is designed to operate as advertised and any unintended problems will be corrected as brought to the attention of AppleSource Software. We cannot be held responsible for losses in time or money from data corruption or hard drive failure. It is the user's responsibility to keep current backups of TimeNet Law Data.

Distribution

TimeNet Law is a commercial product. The demo may be given to a friend, coworker or the man at the bagel shop, freely, provided that it is not modified in any way and this document is included. The TimeNet Law Demo can be included on a CD, provided you email us with the publication information, and the above requests are met.

Additional Information

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