

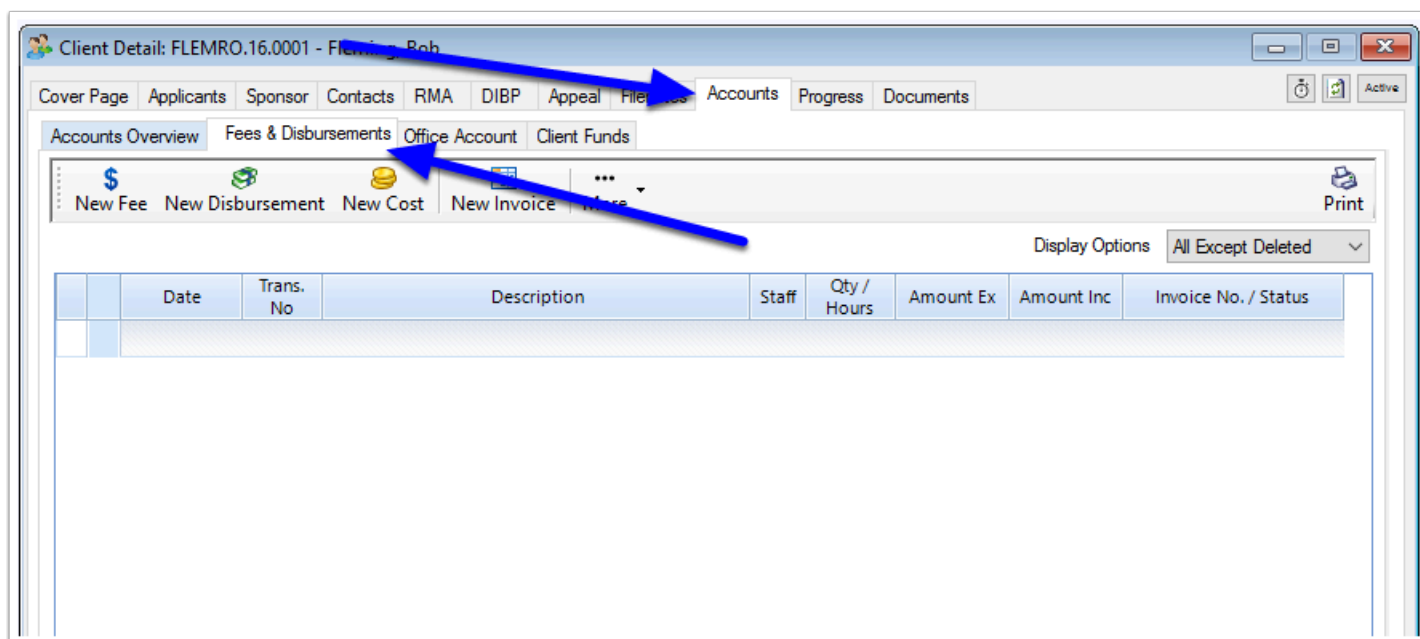
# Record the Work - Record a Fee

The New Fee window allows you to record your professional fees for work done on a matter. Once you have recorded your fees, you will be able to invoice them to your clients.

To create a New Fee, follow the below steps:

## 1. Open the Matter

Open the matter that you want to record an activity/work completed on. Click on the *Accounts* tab then click on the *Fees & Disbursements* sub tab.



## 2. Click New Fee

Next click the **New Fee** button.

Client Detail: FLEMRO.16.0001 - Fleming, Bob

Cover Page Applicants Sponsor Contacts RMA DIBP Appeal Filenotes Accounts Progress Documents

Accounts Overview Fees & Disbursements Office Account Client Funds

New Fee New Disbursement New Cost New Invoice More

Display Options All Except Deleted

Date	Trans. No	Description	Staff	Qty / Hours	Amount Ex	Amount Inc	Invoice No. / Status

### 3. Select the Fee Code

Once the New Fee window appears, select a Fee Code for the activity/work you want to record. The Billing Description, Amount Each and Tax Code will be filled in automatically. Note: if a relevant Fee Code does not exist, it can be created. Please see [How to Create Fee Codes](#)

New Fee

Matter FLEMRO.16.0001 Select

Fee Code [dropdown] Select

Billing [dropdown]

Billing Description [dropdown]

Recorded By Kelly Seal

Billed By Kelly Seal

Quantity 1.00

Amount Each \$0.00 ☐ Amount Includes Tax

Fee No Auto no.

Date 23/08/2016

Amount Ex Tax \$0.00

Tax Code GST Income

Tax \$0.00

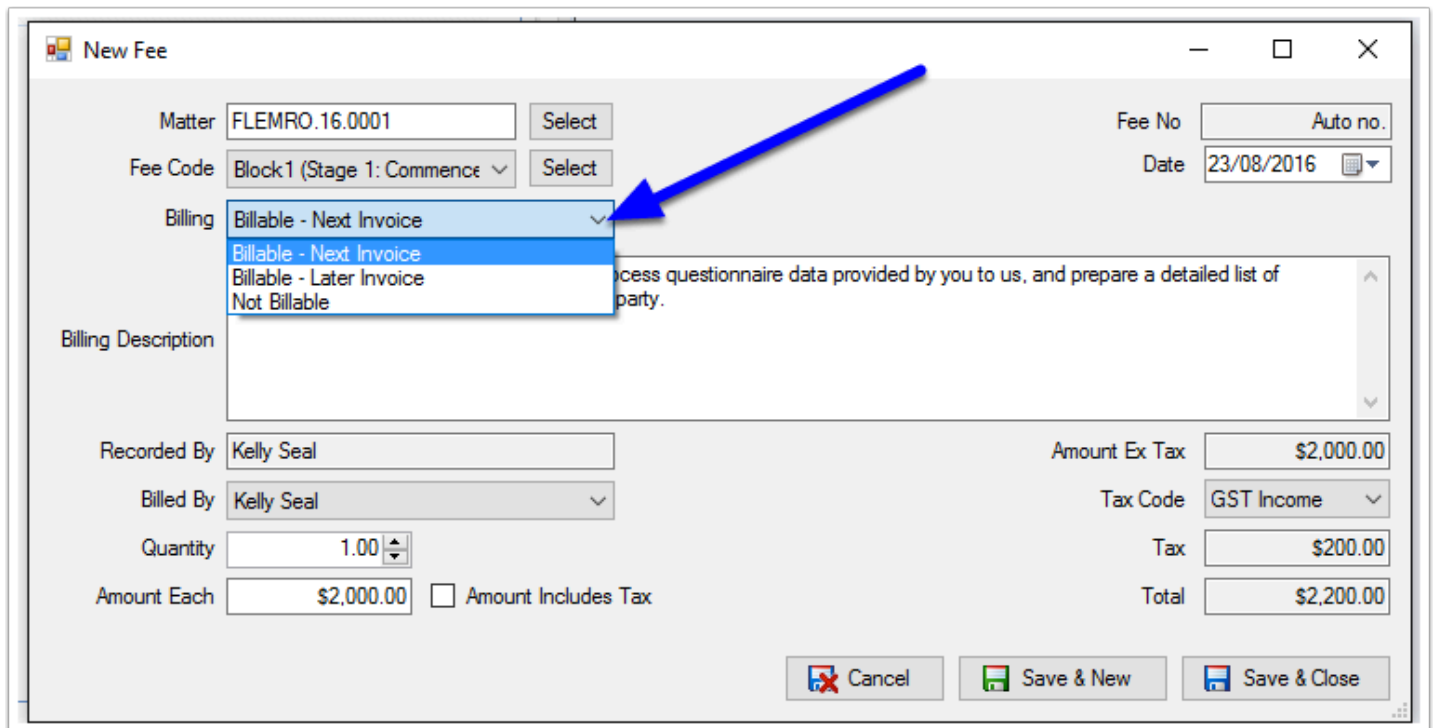
Total \$0.00

Block1 (Stage 1: Commence matter. Review and process documents.)  
 Block2 (Stage 2: Receive, review and process documents.)  
 Block3 (Stage 3: Prepare application and draft supporting documents.)  
 Block4 (Stage 4: Finalise and lodge application.)  
 Block5 (Stage 5: Attend to post lodgement matters and correspondence.)  
 CRT - Attend Court (per hour)  
 DIBP - Attend Department (per hour)  
 INT - Initial Consultation Fee  
 Time NB - Time record by not billable

Cancel Save & New Save & Close

## 4. Set the Status

If you wish this fee to be added to the next invoice, leave the Billing Status set at 'Billable – Next Invoice'. If you wish to hold the fee until a later invoice, select 'Billable – Later Invoice' as the billing status. The fee won't be included in future invoices until the billing status is changed to 'Billable – Next Invoice'. If the fee shouldn't be charged at all, select 'Not Billable' as the billing status.



The screenshot shows the 'New Fee' window with the following fields and values:

- Matter: FLEMRO.16.0001 (with a 'Select' button)
- Fee Code: Block1 (Stage 1: Commence) (with a 'Select' button)
- Fee No: Auto no.
- Date: 23/08/2016
- Billing: A dropdown menu is open, showing three options: 'Billable - Next Invoice' (highlighted), 'Billable - Later Invoice', and 'Not Billable'. A blue arrow points to the 'Billable - Next Invoice' option.
- Billing Description: A text area with a placeholder text: 'Access questionnaire data provided by you to us, and prepare a detailed list of party.'
- Recorded By: Kelly Seal
- Billed By: Kelly Seal (with a dropdown arrow)
- Quantity: 1.00 (with a spinner)
- Amount Each: \$2,000.00 (with an unchecked checkbox for 'Amount Includes Tax')
- Amount Ex Tax: \$2,000.00
- Tax Code: GST Income (with a dropdown arrow)
- Tax: \$200.00
- Total: \$2,200.00

At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save & Close'.

## 5. Enter or Amend the Billing Discription

Enter or amend the Billing Description. This will appear on the invoice when the fee is invoiced. Note: that the Fee Code will usually insert text into the description field based on what the Fee Code has been set up as.

**New Fee**

Matter: FLEMRO.16.0001

Fee No: Auto no.

Fee Code: Block1 (Stage 1: Commence)

Date: 23/08/2016

Billing: Billable - Next Invoice

Billing Description: Stage 1: Commence matter. Review and process questionnaire data provided by you to us, and prepare a detailed list of documents required from you and any other party.

Recorded By: Kelly Seal

Billed By: Kelly Seal

Quantity: 1.00

Amount Each: \$2,000.00 ☐ Amount Includes Tax

Amount Ex Tax: \$2,000.00

Tax Code: GST Income

Tax: \$200.00

Total: \$2,200.00

## 6. Record who undertook the Activity/Work

The 'Billed By' person should be set to the person who did the work. This field will be automatically set to the currently logged in user but can be changed to a different user if required.

**New Fee**

Matter: FLEMRO.16.0001

Fee No: Auto no.

Fee Code: Block1 (Stage 1: Commence)

Date: 23/08/2016

Billing: Billable - Next Invoice

Billing Description: Stage 1: Commence matter. Review and process questionnaire data provided by you to us, and prepare a detailed list of documents required from you and any other party.

Recorded By: Kelly Seal

Billed By: Kelly Seal

Quantity: 1.00

Amount Each: \$2,000.00 ☐ Amount Includes Tax

Amount Ex Tax: \$2,000.00

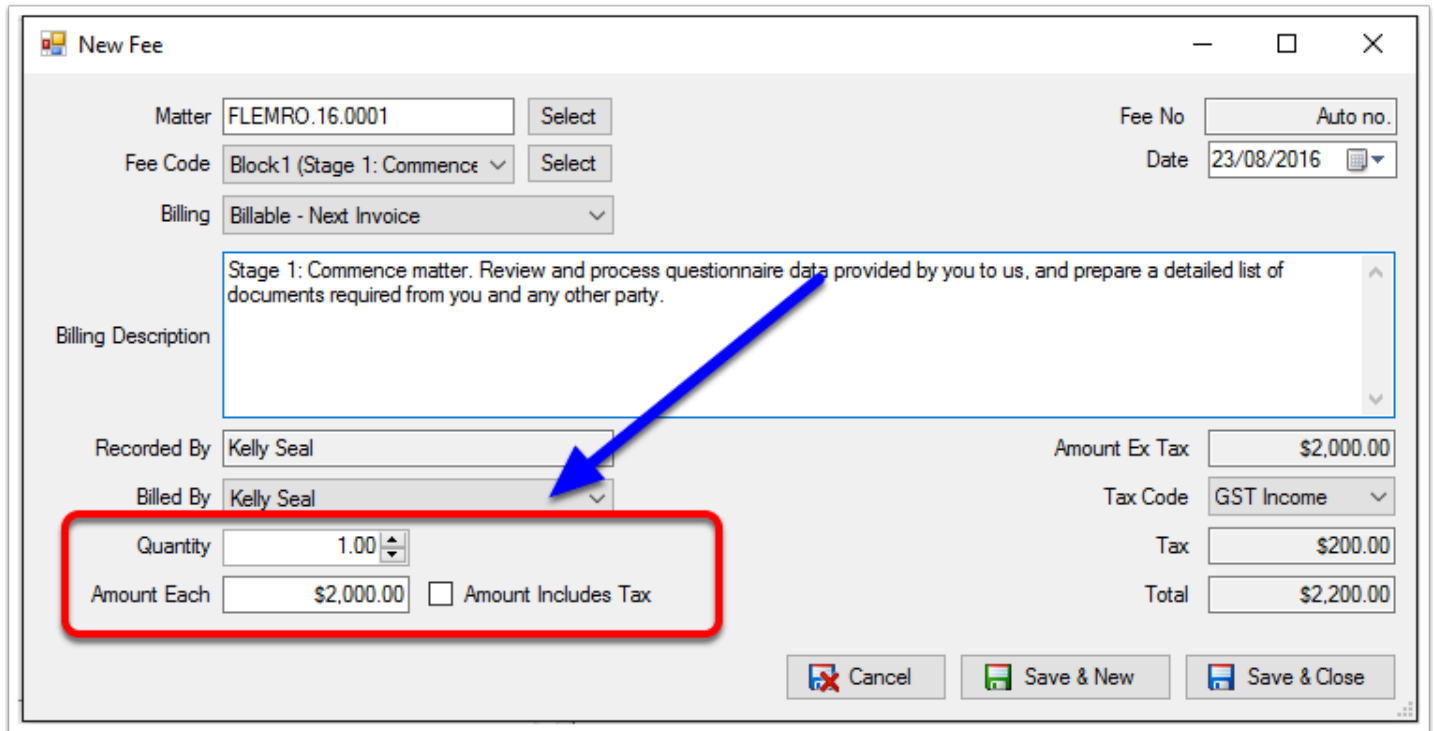
Tax Code: GST Income

Tax: \$200.00

Total: \$2,200.00

## 7. Record the Qty and Value

If you have used a standard Fee Code, the quantity and amount fields will be prepopulated. You can amend these if you want to by entering the appropriate Quantity and Amount. If the Amount Each value is inclusive of tax, tick "Amount Inc. Tax". The system will automatically calculate the total amounts.



The screenshot shows the 'New Fee' form with the following fields and values:

- Matter: FLEMRO.16.0001 (with a 'Select' button)
- Fee Code: Block1 (Stage 1: Commence) (with a 'Select' button)
- Billing: Billable - Next Invoice (dropdown)
- Fee No: Auto no.
- Date: 23/08/2016 (calendar icon)
- Billing Description: Stage 1: Commence matter. Review and process questionnaire data provided by you to us, and prepare a detailed list of documents required from you and any other party.
- Recorded By: Kelly Seal
- Billed By: Kelly Seal
- Quantity: 1.00 (spin button)
- Amount Each: \$2,000.00
- ☐ Amount Includes Tax
- Amount Ex Tax: \$2,000.00
- Tax Code: GST Income (dropdown)
- Tax: \$200.00
- Total: \$2,200.00

Annotations:

- A blue arrow points from the 'Billing Description' text area to the 'Billed By' dropdown.
- A red rectangle highlights the 'Quantity', 'Amount Each', and 'Amount Includes Tax' fields.

Buttons at the bottom: Cancel, Save & New, Save & Close.

## 8. Save & Close

When you have finished entering the fee detail, click **Save & Close** or, to save this fee and enter a new fee, click **Save & New**.

New Fee

Matter

FLEMRO.16.0001

Select

Fee No

Auto no.

Fee Code

Block1 (Stage 1: Commence)

Select

Date

23/08/2016

Billing

Billable - Next Invoice

Billing Description

Stage 1: Commence matter. Review and process questionnaire data provided by you to us, and prepare a detailed list of documents required from you and any other party.

Recorded By

Kelly Seal

Amount Ex Tax

\$2,000.00

Billed By

Kelly Seal

Tax Code

GST Income

Quantity

1.00

Tax

\$200.00

Amount Each

\$2,000.00

☐ Amount Includes Tax

Total

\$2,200.00

Cancel

Save & New

Save & Close