BILL DISPLAY

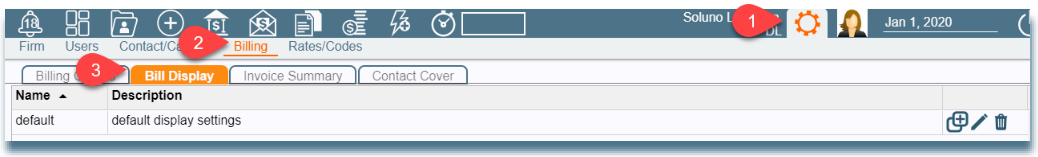
In This Document:

Design customized billing formats in Soluno®.
Add data tokens to your bill displays.

This document utilizes Soluno version 1.5.65. Screens may have been adjusted since publication.

OVERVIEW

To view all of your current bill displays, or to create and modify the appearance of your firm's invoices, navigate to ADMINISTRATOR SETTINGS → BILLING → BILL DISPLAY.



Soluno provides a default display which you can modify by selecting the default display and clicking on the EDIT ICON.

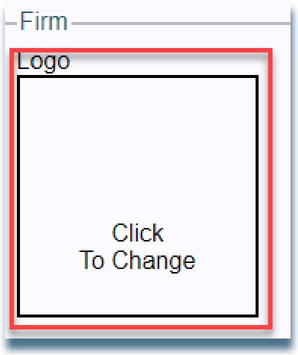
CREATE NEW BILLING DISPLAY

To create personalized billing templates, click on the ADD button at the bottom left of the screen.

First, provide a name and description for the display layout. Then move on to the FIRM section of the window.

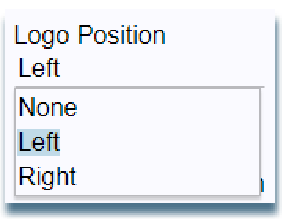
FIRM

You have the option to upload your firm's logo by clicking the add logo window (as seen below) and selecting your logo from your computer or network drives.



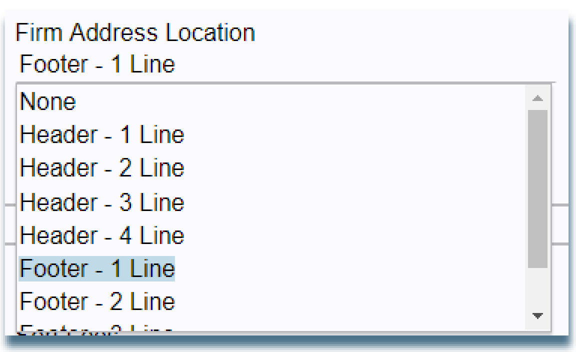
The logo will then appear in the logo window. You can change the image at any point during the process by re-clicking on the logo window.

Next, the administrator can decide if the logo will display on the billing template and its location. If you have issues with your logo, contact Soluno support for assistance.



SHOW FIRM NAME: Lets you specify if and where the firm name appears at the top of the template.

FIRM ADDRESS LOCATION: A drop-down menu allows you to select where your firm's address will appear on the invoice summary display as well as the number of lines it will span.



INCLUDE FIRM PHONE NUMBERS AND EMAIL: Select this option to specify where your firm's contact information will be included on the display.

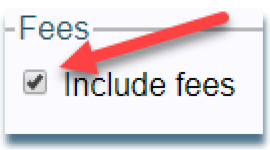
SHOW CLIENT AND INVOICE INFORMATION: This option allows you to display the client address, date, the RE line, and invoice number on the template.

Note: Advanced placement/design of any option above can be achieved using HTML. For more details or help with specific positioning, please contact Soluno support. This includes Logo, Firm name, Address, Contact information and File information.

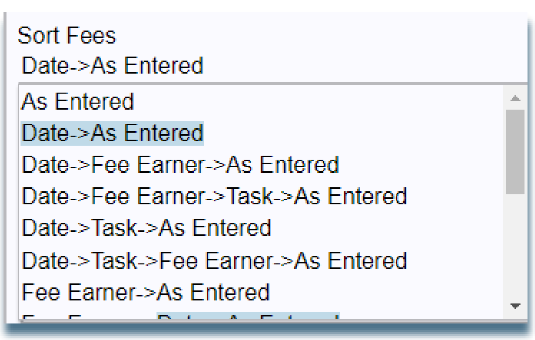
FEES

This section allows the administrator to determine how fees that are charged to the client will appear on the invoice.

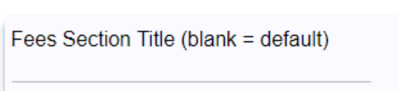
If the invoice template should not show fees, deselect the INCLUDE FEES option.



SORT FEES: Use the drop-down menu to select how you would like the fees to be sorted on the invoices.

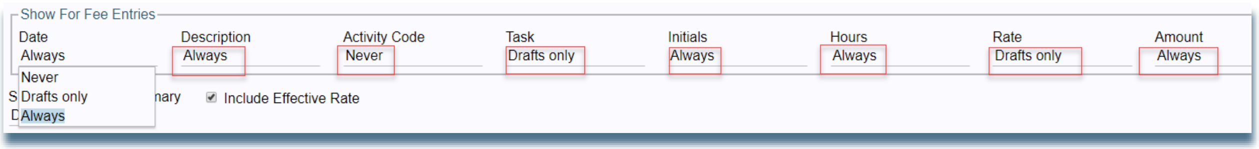


FEES SECTION TITLE: On the line provided, enter the title that you wish this section to have. Common titles for the fees section are “Our Fees Within”, or simply “Fees”. If this field is left blank, Soluno will display a default fees section title.



SHOW FOR FEE ENTRIES

This sub-section lets you decide which fee information will appear on your invoice. When clicking on the date, description, task, initials, hours, rate, and amount you can choose from the following options: NEVER, DRAFTS ONLY, and ALWAYS.



- NEVER – will not appear on any invoice
- DRAFTS ONLY – will only appear during your billing review or Pre-billing
- ALWAYS – will appear on all invoices using this bill display

SHOW FEE EARNER SUMMARY: Select this option if you want a breakdown of the amount that each fee earner billed on the invoice. You can choose not to show them (NEVER); show them only on the draft copy of the invoice (DRAFTS ONLY); or show them on all invoices (ALWAYS). The system defaults to drafts only.

Select INCLUDE EFFECTIVE RATE to show the effective rate of each timekeeper on the Fee Earner Summary.

SHOW TASK SUMMARY: Select this option if you want a Task Code summary breakdown of the fees billed. If you do not want this information to appear, select NEVER. Alternatively, set when you'd like the task summary to appear by selecting DRAFTS ONLY, or ALWAYS.

Click the INCLUDE EFFECTIVE RATE option to see the effective rate by task.

USE DOLLAR SYMBOL: Select this option if you want to have the dollar symbol show before amounts.

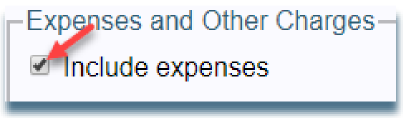
ZERO AMOUNT TEXT: You may choose to put in text if the amount owing is $0.00 (if let blank will default to 0.00).

SHOW INITIALS/FEE SUMMARY EVEN IF ONLY ONE LAWYER: Select this option if you would like to show the summary of fee earners appear even if there is only one fee earner.

EXPENSES AND OTHER CHARGES

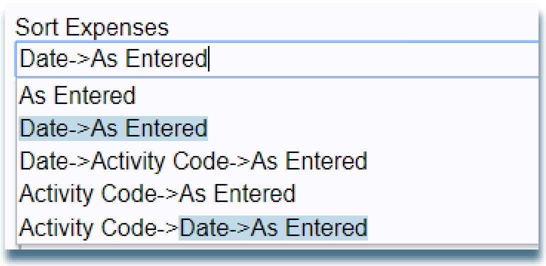
The expense and other charges section allow for the same customization options as the FEES section with a few exceptions which we will discuss below.

If you do not need expenses to appear, deselect the INCLUDE EXPENSES option.



If the invoice template should not show expenses, deselect the INCLUDE EXPENSES option.

SORT EXPENSES: Use the drop-down menu to select the order in which expenses will be presented on the invoice.

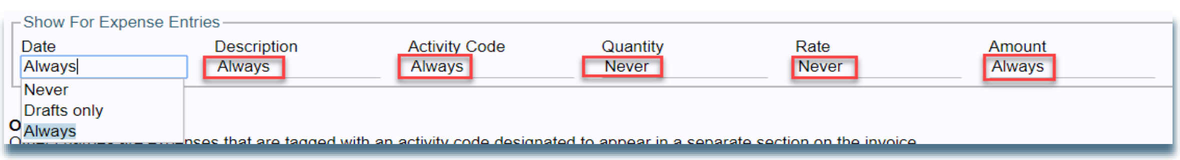


EXPENSES SECTION TITLE: Enter the title you wish this section to have on the line provided. Common titles for this section are "Costs", "Disbursements", and "Expenses". If this field is left blank, Soluno will display a default expense section title.

DIRECTED EXPENSES SECTION TITLE ON SPLIT INVOICES: You can set a different section title if the invoice is being split between multiple parties. Type your desired section title here.

SHOW FOR EXPENSE ENTRIES

This sub-section lets you decide which expense information will appear on your invoice. When clicking on the date, description, activity code, quantity, rate, and amount you will be able to choose from NEVER, DRAFTS ONLY, or ALWAYS.



- NEVER – will not appear on any invoice
- DRAFTS ONLY – will only appear during your billing review
- ALWAYS – will appear on all invoices using this bill display

OTHER CHARGES

"Other Charges" are expenses that have been tagged with an activity code that has been designated to appear in a different section on the invoice.

Note: To review which Activity Codes are marked to appear as an "Other" activity, go to: ADMINISTRATOR SETTINGS → RATE CODES → ACTIVITY CODES.

The Other Charges section is laid out in the same way as the fees and expense sections.

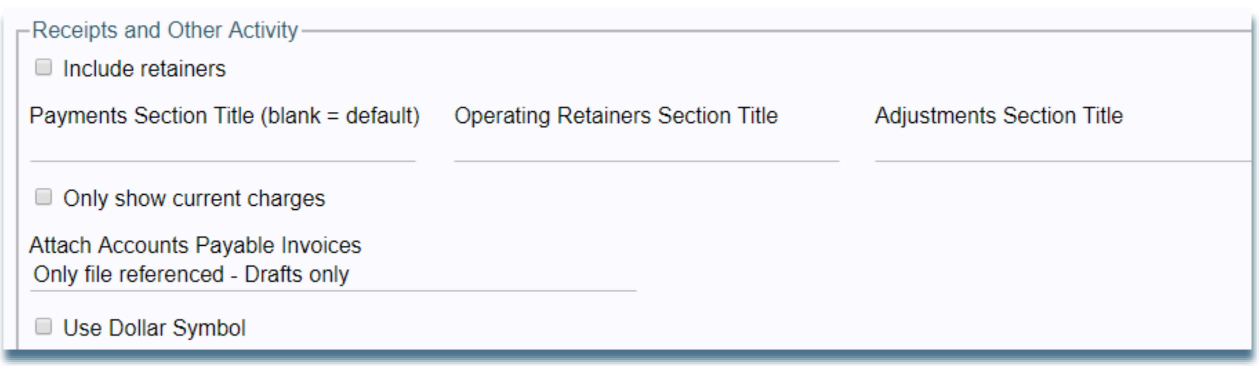
SHOW PAID TO WITH EXPLANATIONS: Select this option if you want to show details of the payee and explanations for expenses which were paid on the client's behalf using either operating out or payables functions.

USE DOLLAR SYMBOL: Select this option if you want to have the dollar symbol show before amounts.

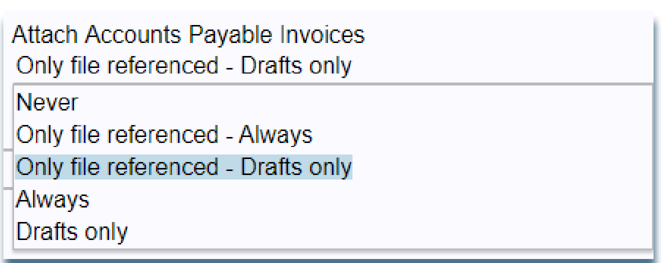
ZERO AMOUNT TEXT: You may choose to put in text if the amount owing is $0.00 (if left blank the default will be 0.00).

RECEIPTS AND OTHER ACTIVITY

This section lets you decide whether to show retainers on the template (INCLUDE RETAINERS checkbox) and allows you to create titles for the different types of receipts (PAYMENT SECTION TITLE, OPERATING RETAINERS SECTION TITLE and ADJUSTMENTS SECTION TITLE. You have the option to ONLY SHOW CURRENT CHARGES as well.



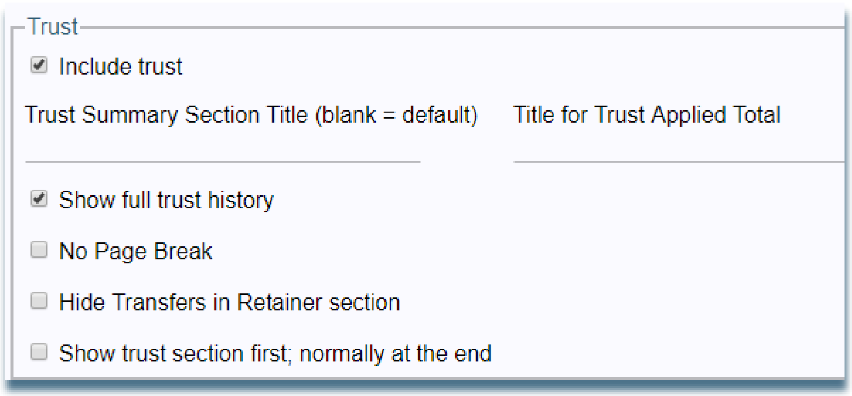
ATTACH ACCOUNTS PAYABLE INVOICES: This option gives the firm the ability to automatically attach vendor invoices to the client bill. The drop-down menu lets you select your desired option.



USE DOLLAR SYMBOL: Select this option if you want to have the dollar symbol show before amounts.

TRUST

This section provides the option to display trust (IOLTA) activity on an invoice template.



INCLUDE TRUST: Deselect this option if you do not want trust (IOLTA) information to appear on the invoice.

TRUST SUMMARY SECTION TITLE: Set the title for this section. If you leave this field blank Soluno will display a default section title.

SHOW FULL TRUST HISTORY: Select this option to show the entire trust history of the file on the bill (including any activity in previous billing cycles).

NO PAGE BREAK: Trust statement will follow immediately at the end of the charges. If not selected, trust statement of transactions will begin a new page of invoice.

HIDE TRANSFERS IN RETAINER SECTION: if selected, Trust to General transfers will be shown in the Retainer section, not in trust statement.

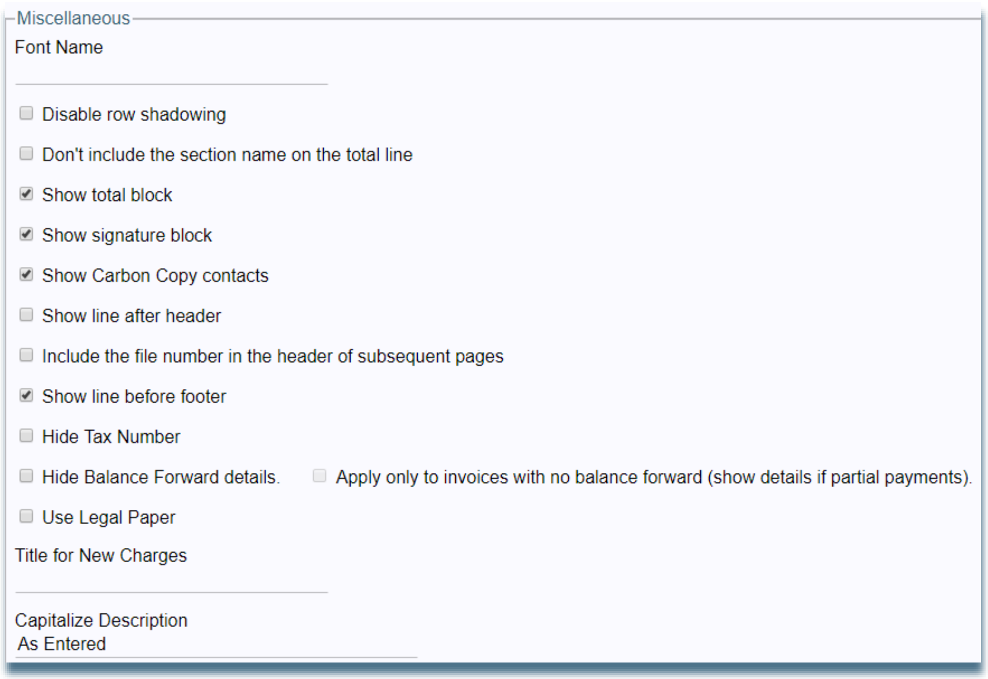
SHOW TRUST SECTIONS FIRST; NORMALLY AT THE END: Invoice order will show the trust section first; before charges and payments.

MISCELLANEOUS

This section allows you to adjust and add additional sections to complete the appearance of your invoice template.

The top part of this section deals with the information that you want to include or exclude in the template. You may have to do some testing to see which settings you prefer.

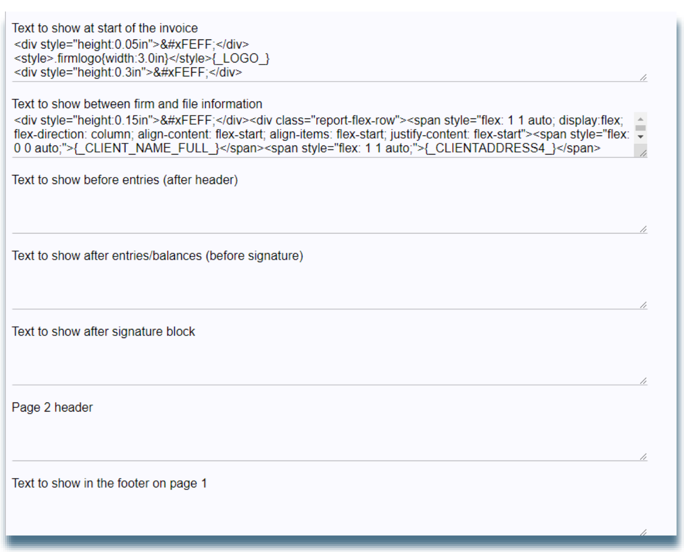
Note: For help on testing invoice templates, please contact Soluno support.



SHOW SIGNATURE BLOCK

One option to note is the SHOW SIGNATURE BLOCK checkbox. This will cause the uploaded digital signature of the relevant fee earners to be displayed on the summary. Uploading or updating your digital signature can be done through your User Settings.

The bottom half of the miscellaneous section provides you with the opportunity to add additional text to various sections within the template. Enter your desired text under the appropriate heading.

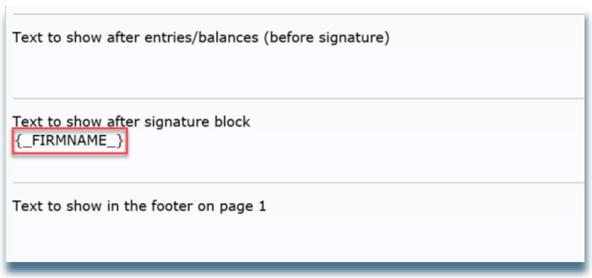


Once you have finished adjusting your layout, click the SAVE button.

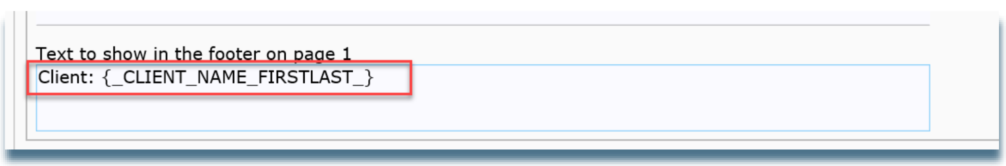
Note: Advanced placement/design of any option above can be achieved using HTML. For more details or help with specific positioning, please contact Soluno support.

ADD TOKENS TO YOUR BILLING DISPLAY (TEMPLATE)

Soluno offers the ability to include tokens in your billing template. These tokens will pull the related information from your data and place it into your show text fields. An example of this is if you wanted to display your firm's name on invoices below your signature line. This also applies to client information and billing data (including totals)

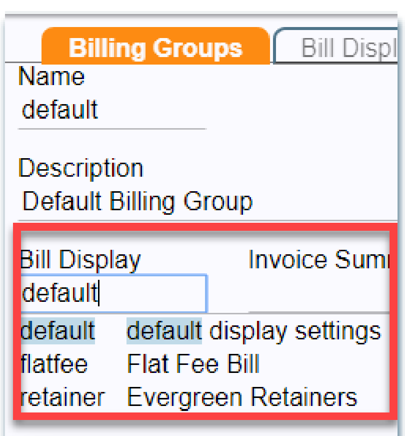


You can also add text with the tokens such as adding the client name to the footer on page 1.



On the next page you will find a list of tokens available to help you customize the look of your invoice.

Once you have saved your Bill Display. You can assign the display to a particular BILLING GROUP by going to ADMINISTRATOR SETTINGS → BILLING → BILLING GROUP and selecting from the list of available billing groups.



LIST OF CUSTOM TOKENS

INFORMATION DISPLAYED	TOKEN
Invoice Number	{_INVOICE_NUMBER_}
File Number	{_CASEFILE_NUMBER_}
File Description	{_CASEFILE_DESCRIPTION_}
File Address	{_CLIENTADDRESS_}
Firm's Logo	{_LOGO_}
Invoice Date short form	{_DATERUN_SHORT_}
Invoice Date long form	{_DATERUN_LONG_}
Full Contact Address	{_CLIENTADDRESS_}
Contact Address on 1 line	{_CLIENTADDRESS1_}
Contact Address on 2 line	{_CLIENTADDRESS2_}
Contact Address on 3 line	{_CLIENTADDRESS3_}
Contact Address on 4 line	{_CLIENTADDRESS4_}
Contacts Full Name	{_CLIENT_NAME_FULL_}
Contacts Name First then Last	{_CLIENT_NAME_FIRSTLAST_}
Contacts Name Last then First	{_CLIENT_NAME_LASTFIRST_}
Contact Attention field	{_CLIENT_NAME_ATTENTION_}
Invoice Number and Description	{_CASEFILE_NUMBERDESCRIPTION_}
Firm Address 1 line	{_FIRMADDRESS1_}
Firm Address 2 line	{_FIRMADDRESS2_}
Firm Address 3 line	{_FIRMADDRESS3_}
Firm Address 4 line	{_FIRMADDRESS4_}
Firm's Contact information	{_FIRM_CONTACTINFO_}
Firm's phone number	{_FIRM_PHONEBUS_}
Firm's Fax number	{_FIRM_PHONEFAX_}
Firm's email address	{_FIRM_EMAIL_}
Firm's Website	{_FIRM_PHONEWEB_}
Firm Name	{_FIRMNAME_}

Note: The above list is a sample of the token fields available. Please contact Soluno support for the full list. If the token you are looking for is not available we will add it to a future update.