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# FROM ARITA'S DESK

A.B. CONSULTING

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www.absims.com

Phone: 313-223-1200

Fax: 313-731-0575

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## Billing Matters® 5.0: A Closer Look

*Manage clients, cases, calendar and billing in a single program*

Billing Matters from DATA.TXT Corporation, the home of Time Matters Software, is an impressive new time and billing application that tackles two firm management jobs in a single database. It is both a case management system (CMS) and time and billing application.

*Suitable upgrade for Timeslips users*

Billing Matters is a suitable upgrade for Timeslips users, as it provides similar billing functions (time and expense entry, accounts receivable, funds, Navigator, etc.) plus manages Events, ToDo lists, Contacts, and Cases. Firms connecting Timeslips to Time Matters or other CMS can now consolidate these functions in one application. Here are some other points where Billing Matters is especially attractive:

- You can use multiple bill layouts during a single bill run.
- Rate Levels have a description that displays on the billing record when used, e.g.: Governmental, Standard, Premium, etc.
- Each bill is saved to a PDF file.
- You can post (approve) a bill without printing it.
- You can override split billing on a billing record.
- You can easily suppress the default bill message for a client.
- You can arrange your case list layout to include billing information such as accounts receivable aging. (See Figure 2 on page 2).
- You can print multiple addresses on a bill.

*Wish list*

Billing Matters could use some enhancements. Among those I would like to see are: 1) Time and Expense application for handheld devices. Billing Matters links to Palm and Pocket PC devices, but only for synchronizing Events, Contacts, ToDo's, Notes and Email. 2) AutoTXT codes that help speed up entry

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Rate Level	Description	Amount
None	None	\$0.00
Level 1	Standard	\$155.00
Rate 2	Premium	\$175.00
Men 3	Discount	\$140.00
4	Governmental	\$100.00
5	Special Service	\$100.00

**Figure 1. Billing Entry Rate Selection**

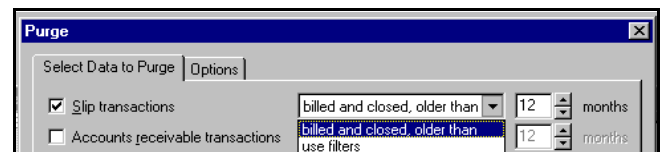
## How to Archive in Timeslips

*Removing old data improves performance*

**archive** noun. 1. A collection of historical documents or records. verb. 1. Place in an archive. 2. Computing transfer (data) to a less frequently used storage medium.

Keep your Timeslips database running fast by periodically archiving older data. In Timeslips terminology, *an archive* is a file containing slips copied from the main database. When you create an archive file in Timeslips, you typically remove the archived slips from the main database, but this is not required. Some firms use an archive file as a means to transport slips from one computer to another, leaving them in the main database. In this article I will address the typical use of archiving—reducing the number of slips in the database. Here are the steps to create an archive. These steps and screen shots are for Timeslips 2004, but are generally the same for Timeslips 9.1 and higher. For Timeslips 8, go to the Timeslips Services area of [www.absims.com](http://www.absims.com) and click *Your Timeslips Questions Answered*.

1. Back up your database!
2. Select File, Purge.



**Figure 3. Purge scope options.**

3. Set the filters to the desired scope. You may use the default (billed and closed, older than 12 months), or choose the filters option to build your own scope. The default scope shown in Figure 3 means Timeslips will

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of common words and phrases should be made available to all text boxes, not just the billing form. 3) An accounts payable link from QuickBooks that would send checks to Billing Matters as expense entries.

*Preparing to change billing systems*  
I have helped several firms move to Billing Matters. Here are some pointers for preparing to change to Billing Matters.

- Prepare your current data. This means to process all bills and payments and assure the data is error-free.
- Write off uncollectible balances.
- Purge and archive closed accounts.
- Review and *define* rate schedules. For example, if the firm assigns hourly rates based on staff classification, and/or hourly rates vary depending on the client, define schedules that capture the rates in an orderly manner. See the sample rate tables diagram in Figure 3.
- If you plan to link to QuickBooks, review your chart of accounts to make sure cash, trust and income accounts are defined.

MatterRef	MatterNo	Client	Tel/Fax	Balance	Current	30 Days	60 Days	90 Days	120 Days
<input checked="" type="checkbox"/> Able v. State of Florida	03-1236.1	Barry B. Able	612-555-9210	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Arthur Patent	01-4878.1	Betty Arthur	305-555-9033	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Baxter v. A. Jenkins Engineering LLC	01-7458.22	Therellus Baxter	919-555-7455	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Brubaker Bankruptcy	02-1113.1	Bruce Brubaker	516-555-1492	122.35	0.00	0.00	0.00	0.00	122.35
<input type="checkbox"/> Chelsea v. City of Hialeah	03-1252.1	City of Hialeah		0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> City of WPB v. Hopkins	01-1342.4	Eugene Hopkins	954-555-6189	500.00	0.00	0.00	0.00	0.00	500.00
<input type="checkbox"/> Fleury v. Fleury	02-1251.1	Linda Fleury	305-555-4736	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Florida v. Sanders	03-1231.1	Gloria Sanders	919-555-5565	600.00	0.00	0.00	0.00	0.00	600.00
<input type="checkbox"/> Goodrich Estate	03-1593.1	Sarah Goodrich	415-555-8964	1,000.00	0.00	0.00	0.00	0.00	1,000.00
<input type="checkbox"/> Gordon v. Hammersmith	01-1276.1	Larry D. Gordon	212-555-6932	1,144.00	0.00	0.00	0.00	0.00	1,144.00
<input type="checkbox"/> Gordon v. Miami Marine	03-3637.1	Larry D. Gordon	212-555-6932	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Helleman v. Helleman	02-1718.1	Deborah Helleman	305-555-6521	100.00	0.00	0.00	0.00	0.00	100.00
<input type="checkbox"/> Lee v. All County Insurance	01-1249.1	Corrie Lee	305-555-6908	1,154.75	0.00	0.00	0.00	0.00	1,154.75
<input type="checkbox"/> MegaTech - Patent	02-1435.6	MegaTech Computers, Inc.	305-555-4344	750.00	0.00	0.00	0.00	0.00	750.00
<input type="checkbox"/> MicroTech v. MegaTech	01-4432.2	MegaTech Computers, Inc.	305-555-4344	803.75	0.00	0.00	0.00	0.00	803.75
<input type="checkbox"/> Molina v. United Builders	02-1423.1	Rafael S. Molina	305-555-1616	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Morton v. MegaTech	01-1145.1	MegaTech Computers, Inc.	305-555-4344	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> NY State v. Theodore Boland	03-1123.1	Theodore Boland	212-555-6734	262.50	0.00	0.00	0.00	0.00	262.50
<input type="checkbox"/> Peters v Seacoast	88-007	Seacoast Marine Corporat...		20.00	20.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Plummer Assault	03-2897.1	Adrian Plummer	662-555-4821	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Road v. Automated Machines	01-2876.2	Leonard Road		1,650.40	0.00	0.00	0.00	0.00	1,650.40

Figure 2. Billing Matters Matter List with A/R Balances

- Schedule time. A billing system conversion is a not accomplished overnight. Be prepared to spend a few days in transition. Planning, setup, data conversion, verification, and training take time. Plan on dedicating a few consecutive days to these tasks.

*Accounting Link*

Billing Matters includes a link to Quickbooks that updates Quickbooks customers from Billing Matters' clients. It receives General Ledger transactions direct from Time Matters when you post the G/L Distribution Report. The report can be run on an Accrual (transfer invoices) or Cash (transfer payments) basis.

*Price*

Billing Matters is regularly priced at \$300 for the first user and \$150 for each additional user. For information on sales and discounts, call me at 313-223-1200. ❄

Partners		
Level	Description	Rate
1	Standard	180
2	Premium	200
3	Governmental	170
4	Special	150
Associates		
Level	Description	Rate
1	Standard	120
2	Premium	150
3	Governmental	120
4	Special	100

Figure 3 - Sample Rate Tables

## Call Me First

❄

Installing new computers? Don't risk data loss or unnecessary down time. Call me before attempting to move or reinstall your Timeslips or Time Matters programs or data to new computers. ❄

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purge only those slips that are **closed** and have been approved on a bill, and are dated over 12 months ago. **Closed** slips are slips that have been moved to the "long term storage" area in Timeslips by running the Close Slips command. Slips are never automatically closed. However, if you close a client with open slips, those slips will move to **inactive** status. You may include closed and inactive slips in a report. You cannot include purged slips in a report unless you retrieve them first from the archive file created during the purge.

- Click the Options tab, check the first box and enter a location and name for your archive file. (Timeslips adds .sar to the file name.) You can create a new archive or add the slips to an existing archive. Review the other options on this screen. I recommend that you leave these unchecked.

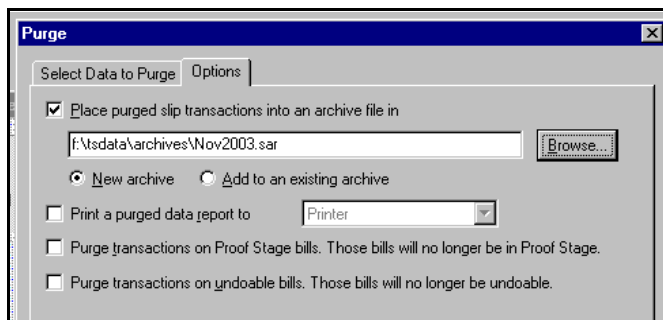


Figure 4. Putting purged slips into an archive.

- Click Purge to begin the purge. All of the slips indicated will be removed from the database and moved to the archive file.

### Archiving Clients and Timekeepers

Timeslips archive (.sar) files contain slips only. If you want to remove closed clients (or timekeepers) from the system, you should first create a backup of your database to save for historical purposes should you need to reference information for the closed clients or timekeepers. Then you may use the Purge feature to purge the closed Clients and Timekeepers. You may purge a Client or Timekeeper and archive their slips at the same time. Here are the steps for purging a client and archiving that client's slips.

- Back up your database. Name the file something like Nov03-Before Purge.bku .



Figure 5. Change Classification

- Open the Client list and use the Change Classification button to move the client from open to closed status.
- Select File, Purge and check the box Clients with a Closed Classification.
- Click the Options tab, check the first box and enter a location and name for your archive file.
- Click Purge to begin the purge. The client and all of the slips for the client will be removed from the database. The slips will go to the archive file

designated in step 4.

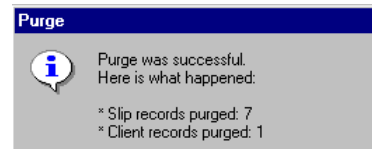


Figure 5. Message after purging closed clients.

### Working with Archive Files

To work with slips that have been archived, you may either 1) bring them into your current database or 2) create a "scratch" database to bring the archived slips into. To import an archive into your current database, select File, Combine. Browse to the location of your archive file and select it. Set the status for the combined slips. Use **Temporary** if you plan to remove the slips from the database soon after working with them. You may use temporary slips on reports, but not on bills or pre-bill worksheets. You may remove Temporary slips from you database by selecting Slips, Delete Temporary Slips. To work with archive slips in a separate database, select File, New Database. Follow the wizard to set up your new database, then use File, Combine to bring the archived slips into the new database. ✨

### Timeslips Purge / Archive Glossary

**Archive** - Process of creating a file containing selected slips copied from a Timeslips database. An archive file name ends **.sar**.

**Closed Client** - Client whose classification has been changed to closed. Use when you plan to purge a client from the database.

**Closed Slips** - Slips moved to "long term storage" via the Close Slips command.

**Inactive Client** - Client whose classification has been changed to Inactive. Use for Clients who may need reactivation later.

**Inactive Slips** - When a Client with open slips is made inactive or closed, those slips become inactive.

**Purge** - Process of permanently removing slips, transactions, timekeepers or clients from the database. Includes the option to create an **archive** file.

**Temporary Slips** - Slips imported from an archive may be assigned temporary status. Temporary slips will not appear on bills or pre-bill worksheets.

## Downtown Detroit Training Classes

### Billing Matters Basic Course - Full Day

December 10, 2003 – 9am - 4pm

January 7, 2004 – 9am - 4pm

February 11, 2004 – 9am - 4pm

### Timeslips Basic Course - Half Day

December 2, 2003 – 9am - Noon

January 20, 2004 – 9 am - Noon

### Timeslips Intermediate Course - Full Day

December 3, 2003 – 9am - Noon

January 21, 2004 – 9 am - Noon

LAPTOPS PROVIDED

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### A.B. CONSULTING

*Computer Applications Consulting, Training & Support*

555 Brush Street #1906

Detroit, Michigan 48226-4355

Phone: 313-223-1200 E-mail: [arita@absims.com](mailto:arita@absims.com)

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