

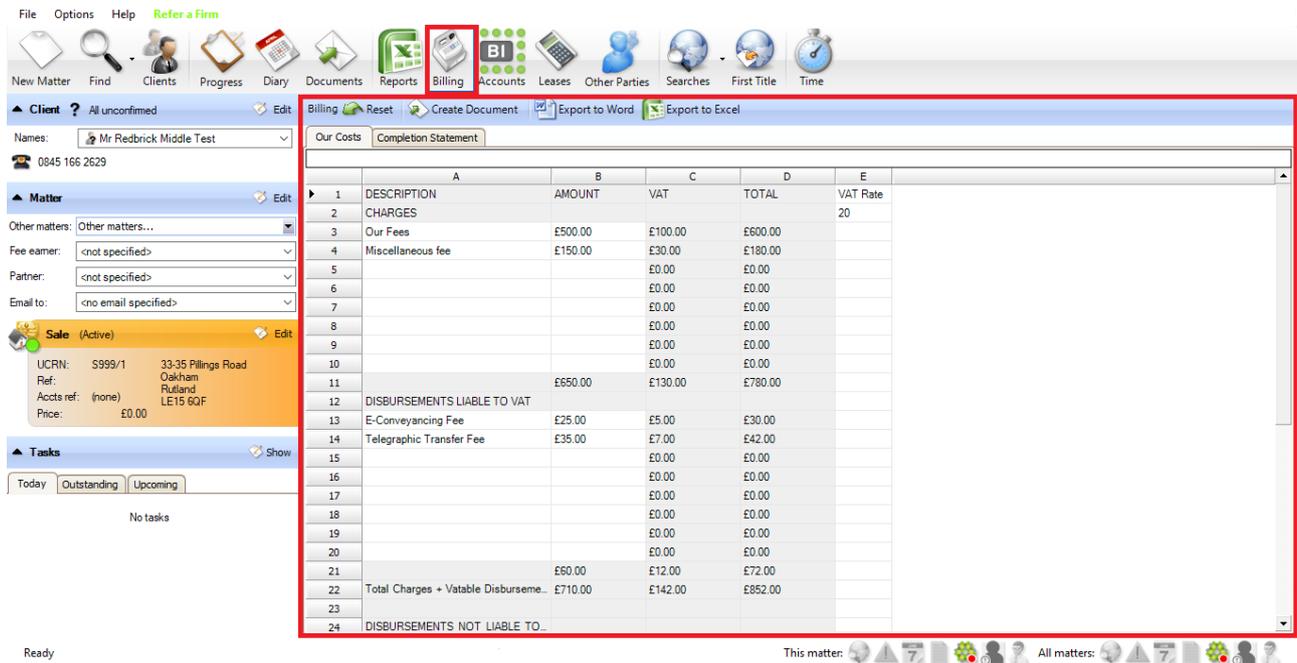


Legal Case Management

Using the Billing Screen

Using the Billing Screen

From the Home page in RPM click on the 'Billing' button and a screen like the one below will appear.



The screenshot shows the 'Billing' screen in the RPM system. The 'Billing' button in the top menu is highlighted with a red box. The main area displays a table with the following data:

	A	B	C	D	E
	DESCRIPTION	AMOUNT	VAT	TOTAL	VAT Rate
1	DESCRIPTION				
2	CHARGES				20
3	Our Fees	£500.00	£100.00	£600.00	
4	Miscellaneous fee	£150.00	£30.00	£180.00	
5			£0.00	£0.00	
6			£0.00	£0.00	
7			£0.00	£0.00	
8			£0.00	£0.00	
9			£0.00	£0.00	
10			£0.00	£0.00	
11		£650.00	£130.00	£780.00	
12	DISBURSEMENTS LIABLE TO VAT				
13	E-Conveyancing Fee	£25.00	£5.00	£30.00	
14	Telegraphic Transfer Fee	£35.00	£7.00	£42.00	
15			£0.00	£0.00	
16			£0.00	£0.00	
17			£0.00	£0.00	
18			£0.00	£0.00	
19			£0.00	£0.00	
20			£0.00	£0.00	
21		£60.00	£12.00	£72.00	
22	Total Charges + Vatable Disburseme..	£710.00	£142.00	£852.00	
23					
24	DISBURSEMENTS NOT LIABLE TO..				

This screen is comparable to, but not the same as, Excel. It is used to store data relating to billing values and can be set up with formulas to automatically calculate running totals, VAT etc.

When you first click into the billing screen for a job, the default billing template will appear. Depending on what was agreed with your administrators when the system was set up, this should be filled out with standard charges and disbursements.

Note – if your default billing template is empty or you feel it contains erroneous information, please contact your system administrator who should be able to help.

Entering Values

If you need to add or amend a fee or disbursements description or amount, simply click on the cell that you require and your cursor will appear towards the top of the screen. Just type the information and **press Enter** (*this is important as pressing Tab **will not** save the entry*).

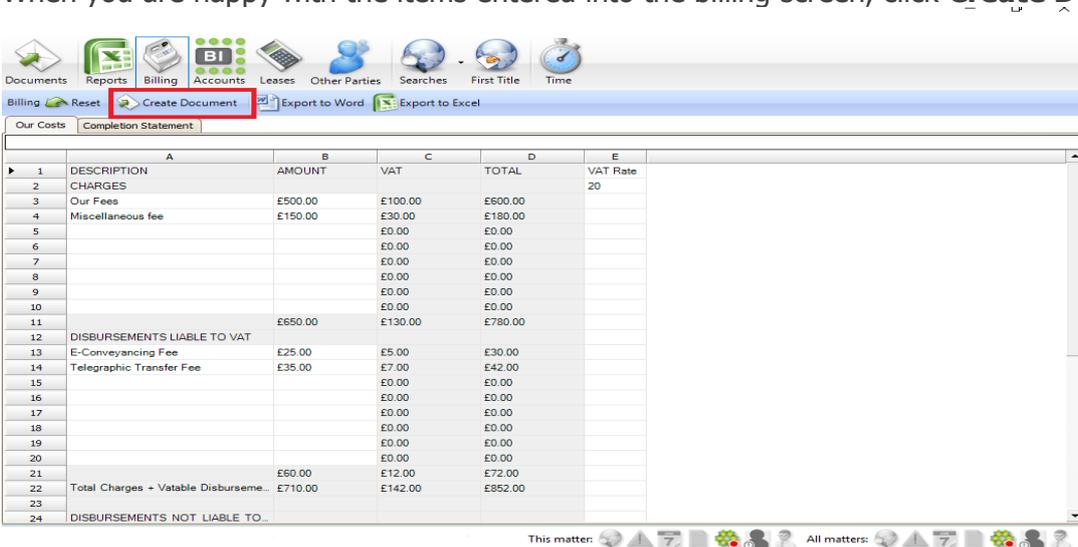
Our Costs		Completion Statement			
0.00					
	A	B	C	D	E
1	DESCRIPTION	AMOUNT	VAT	TOTAL	VAT Rate
2	CHARGES				20
3	Our Fees	£650.00	£130.00	£780.00	
4			£0.00	£0.00	
5			£0.00	£0.00	
6			£0.00	£0.00	
7			£0.00	£0.00	
8		£650.00	£130.00	£780.00	
9	DISBURSEMENTS LIABLE TO VAT				
10	E-Conveyancing Fee	£25.00	£5.00	£30.00	
▶ 11	Telegraphic Transfer Fee	£0.00	£0.00	£0.00	

If you are entering a disbursement that is subject to VAT, you will find a section for this underneath the 'CHARGES' section. When you update the value of the disbursement (before VAT) in column B, the VAT will automatically calculate into Column C with the total appearing in Column D.

Note – You do not need to remove text or wording in column A, if there is a zero value in B (and or column D) then the wording is not pulled into the document. This means a whole set of standard charges can be listed and the user only needs to zero the value rather than remove the whole line or wording.

Creating a Document

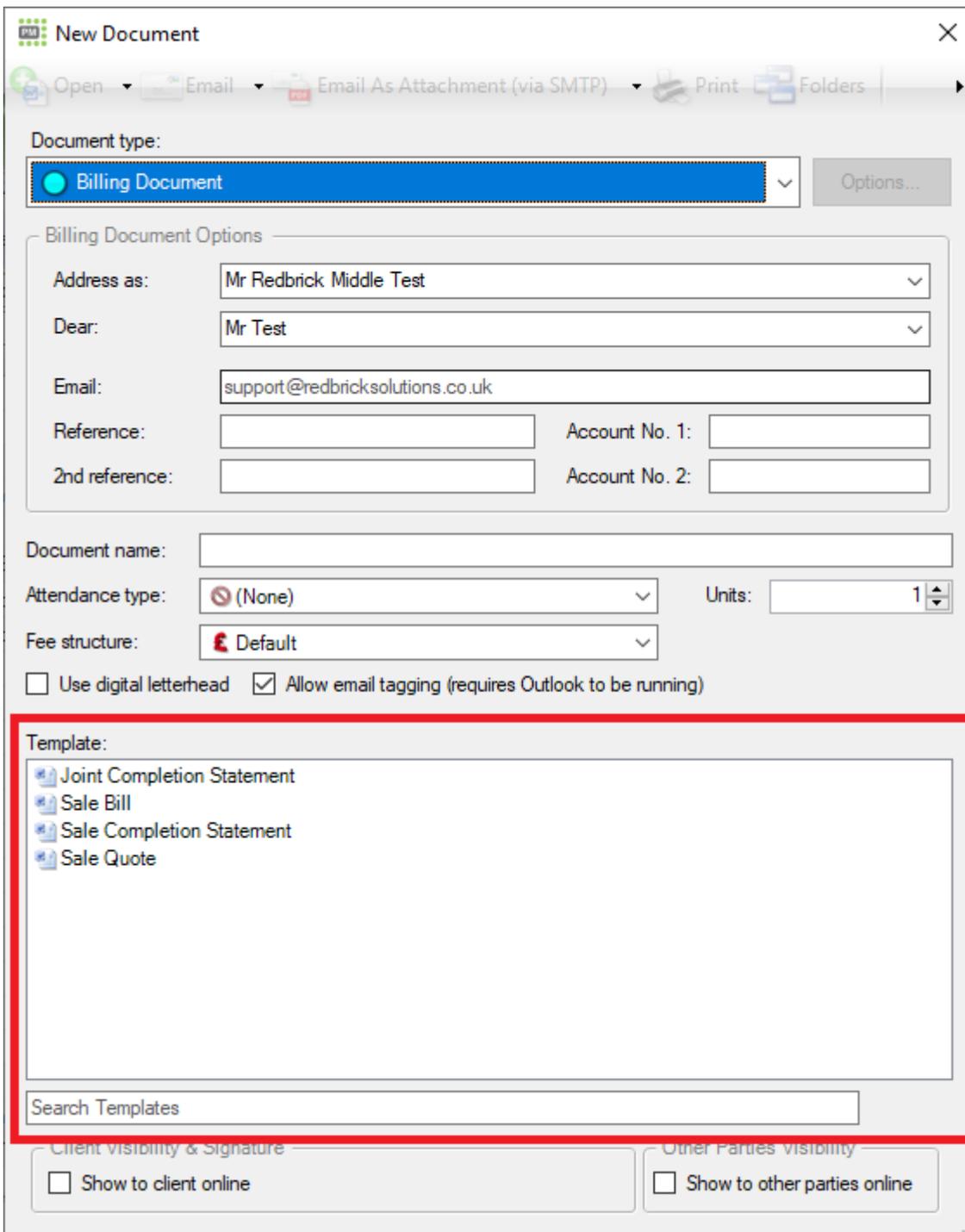
When you are happy with the items entered into the billing screen, click **Create Document**.



	A	B	C	D	E
▶ 1	DESCRIPTION	AMOUNT	VAT	TOTAL	VAT Rate
2	CHARGES				20
3	Our Fees	£500.00	£100.00	£600.00	
4	Miscellaneous fee	£150.00	£30.00	£180.00	
5			£0.00	£0.00	
6			£0.00	£0.00	
7			£0.00	£0.00	
8			£0.00	£0.00	
9			£0.00	£0.00	
10			£0.00	£0.00	
11		£650.00	£130.00	£780.00	
12	DISBURSEMENTS LIABLE TO VAT				
13	E-Conveyancing Fee	£25.00	£5.00	£30.00	
14	Telegraphic Transfer Fee	£35.00	£7.00	£42.00	
15			£0.00	£0.00	
16			£0.00	£0.00	
17			£0.00	£0.00	
18			£0.00	£0.00	
19			£0.00	£0.00	
20			£0.00	£0.00	
21		£60.00	£12.00	£72.00	
22	Total Charges + Vatable Disburseme...	£710.00	£142.00	£852.00	
23					
24	DISBURSEMENTS NOT LIABLE TO...				

A **New Document** window appears (see 'Document User Guide' for more information on this) only this time the Billing document type is already selected.

From here, all you need to do is double-click on the document you wish to create.



Please note – Billing documents can take longer to open than regular documents and letters, because every cell in the billing screen is being checked for a value before being pulled into the document (if the value of a disbursement is '£0.00' it will not appear in the document).

Once the document has finished populating, it should appear in your own format with information that reflects the entries in the billing screen – it should look something like this (on your own template).



Invoice No: 5789

Mr B Test and Mrs S Test
33-35 Pillings Road
Oakham
Rutland
LE15 6QF

VAT Registration Number: 123 4567 89

Ref: KM/SSS/GRE001/1

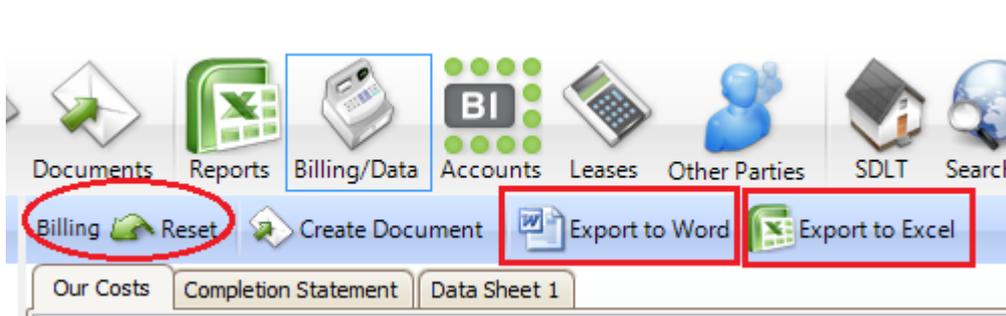
Date: 20 June 2017

	Costs	Disbursements	VAT @ 20%
PROFESSIONAL CHARGES in connection with your Sale of 33-35 Pillings Road, Oakham, Rutland, LE15 6QF at a price of £299,999.00.			
Our Fees	£650.00		£130.00
DISBURSEMENTS			
E-Conveyancing Fee		£25.00	£5.00
Telegraphic Transfer Fee		£30.00	£6.00

From this point onward, the process is the same as any other new document (*see Document User Guide' for more information*).

If you find incorrect information on the document, check the billing screen first as this document should be mirroring exactly what is in there. If you find the problem again in the billing screen, amend it there and generate the document again.

If you find that the calculations are wrong, or you see N/A in any of the cells, it could be that the billing screen in your matter has changed since the matter was entered on Redbrick. You will need to reset each billing screen (Our Costs and Completion Statement for example). There is an option to Export to Word or Excel before you reset these screens as a 'reset' will take out any manual data entered and the export captures an image of the screen to allow you to change things back to how they were.



If the figures are still not correct when you re-run your billing document, contact your administrator who will be able to fix it.



If you have any queries on Redbrick please either contact your dedicated Business Consultant or our Support team.



Support

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Email : Support@RedbrickSolutions.co.uk

Website : www.redbricksolutions.co.uk

Address :

Top Floor

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Or access our Client Area for support and additional resources:

<https://www.redbricksolutions.co.uk/client-login>