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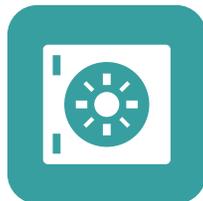
by √profitsolv

PracticeMaster
Fee Entry Quick Guide

Tabs3 Billing

PracticeMaster

Trust Accounting

Accounts Payable

General Ledger

PracticeMaster Fee Entry Quick Guide

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Quick Guide for PracticeMaster Fee Entry

Fee entry is an essential part of practice management software. It is used to track all time spent on clients for productivity and billing purposes. Since it is one of the most used features of the PracticeMaster software, it is important to understand how to enter your fees quickly and accurately. The following guide will provide you with the information you need to enter fees.

Getting Started

To begin, navigate to the Client File in PracticeMaster. Select a client and click the **Fee** tab.

The Fee window will look similar to the figure on the right. The top panel contains the fee list and shows all of the fees for the selected client. The bottom panel contains a SnapShot of the selected fee. The right panel contains the Quick Clicks pane, which provides fast access to frequently used functions. The list of fees can be sorted by clicking on any of the column headers. At the top of the window is the Search Box, which allows you to search for a word or phrase anywhere within the currently selected column layout. *(More information on the Search Box can be found in the PracticeMaster Search Guide.)*
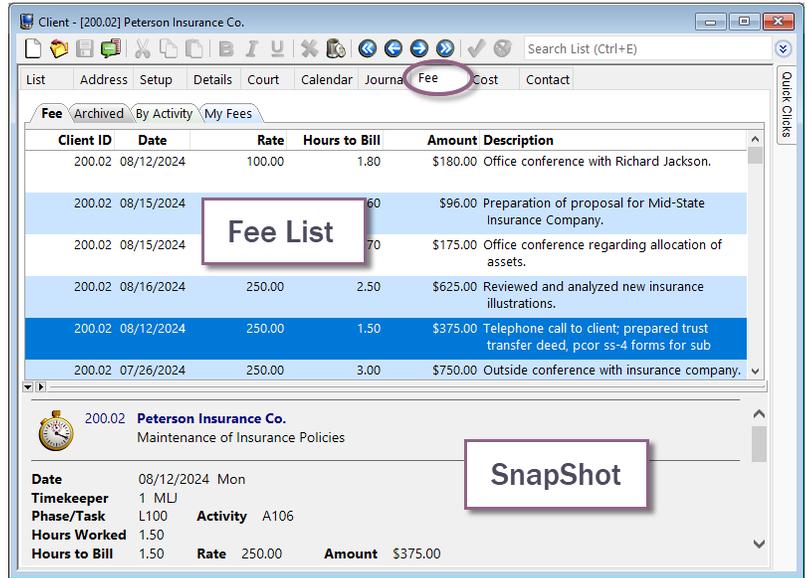
Creating a New Fee Entry

Creating a new fee entry is just four short steps away! On the toolbar, click the ⬜ button. This will open the new Client Related Fee window, as shown on the right.

We recommend that you at least enter values for two fields: **Hours Worked** and **Description**. If you want to keep the default values for all the other fields, simply follow this basic step-by-step Fee Entry Procedure to enter your fee.

▶ **Fee Entry Procedure**

1. Click ⬜ to create a new fee.
2. Record the hours worked in the Hours Worked field.
3. Describe the activity in the Description field.
4. Click 💾 to save the fee.
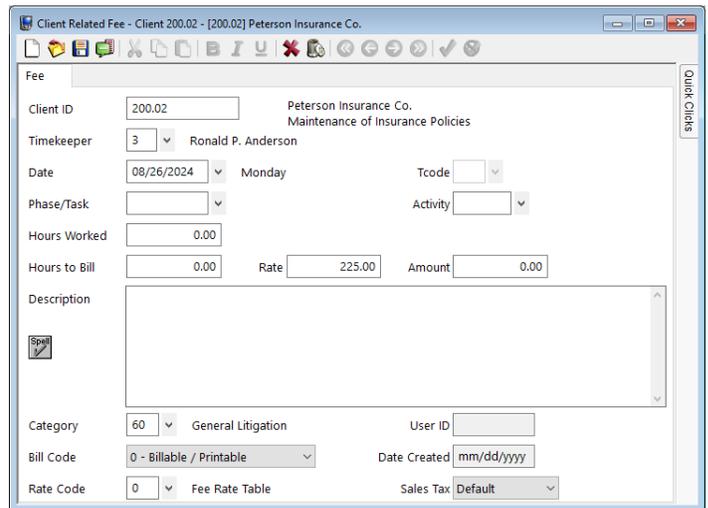
Fee Entry Information

We have just described the most commonly-used method for fee entry in PracticeMaster. The following sections will explore the basic elements of the Fee window, how to access the Fee window, and how to add new fees from the Fee window.

Fee Window Explained

The Fee window may look like it has a lot of fields to fill out, but many fields are filled in by default. This section will give you a basic look at the fields and what they represent. For more detailed information on the Fee Entry window, refer to Advanced Field Information beginning on page 4.

The item numbers in the following list correspond to the numbered items in the figure.

1. **Client ID** – This field is automatically populated with your client's information.

2. **Timekeeper** – This field contains the timekeeper that is responsible for the fee.

3. **Date** – This field specifies the date on which the fee was incurred.

4. **Tcode** – This field is used to represent a type of service. It is also known as the Transaction Code field.

5. **Phase/Task** – This field will only be available for clients who are set up for task based (electronic) billing. It classifies the billing phase associated with the fee.

6. **Activity** – This field will also only be available for clients who are set up for task based billing. It holds the activity code that represents the activity performed.

7. **Hours Worked** – This field indicates the number of hours a timekeeper worked on a transaction.

8. **Hours to Bill** – This field indicates the number of billable hours.

9. **Rate** – This field indicates the hourly rate of the timekeeper for the fee.

10. **Amount** – This field indicates the total amount for the fee.

11. **Description** – This field is used to describe the transaction being recorded.

12. **Category** – This field is used by Tabs3 Billing to classify fee services into related groups for reporting purposes.

13. **User ID** – This field indicates the user who entered the fee.

14. **Bill Code** – This field indicates the billing and printing status.

15. **Date Created** – This field indicates the date that the fee was entered.

16. **Rate Code** – When integrating with Tabs3 Billing, this field can be used to override the default rate.

17. **Sales Tax** – When integrating with Tabs3 Billing, this field indicates if a fee is taxable and if so, the sales tax rate to apply.
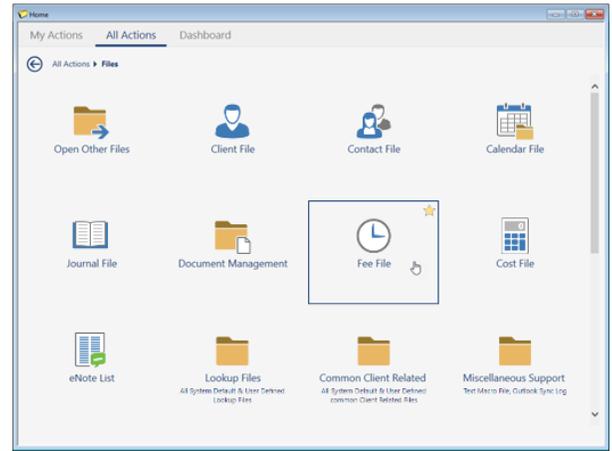
Accessing Fees

You have just learned how to create a new fee from the Client file. This section will explore how to access fees from other PracticeMaster locations.

From the Home Page

You can access fees by using the Home Page that opens when you start PracticeMaster. From the **Files** group, choose the **Fee File** icon, as shown in the figure on the right.

From the Quick Launch Pane

You can access fees from the Quick Launch pane. Simply press Ctrl + Q and type "Fee File".

From the Menu Bar

You can access fees from the menu. From the **File** menu, point to **Open** and select the **Fee** menu option, as shown in the second figure on the right.

Using Keyboard Shortcuts

You can access fees by using a keyboard shortcut. Simply press Ctrl + Shift + F.

When the Fee window is opened using one of the above methods, the List tab will be selected and will include all fees for all clients.
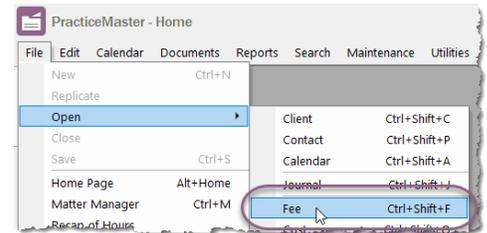
# Adding a New Fee Entry from the Fee Window

The previous section showed you how to access the Fee window. This section explores how to create a new fee entry from the Fee window. This method is slightly different from the approach used in the Client file because with this method, you must first select your client. With the Fee window open, any of the following techniques will open a blank record for fee entry.

- From the Fee file, click the ⬜ button in the task bar.
- From PracticeMaster's menu bar, select *File | New*.
- Press Ctrl + N.

Each of the above techniques will open the New Client Related Record window where you will be prompted to select the client for which the fee will be entered. This can be done using one of the following methods:

- Enter the Client ID.
- Enter up to the first 16 letters of the client name.
- Use the ⌄ button to open the Client Lookup Window.

Once the client is selected, a new fee for that client will be started. From this point, the process is the same as when creating a new fee from the Client file.
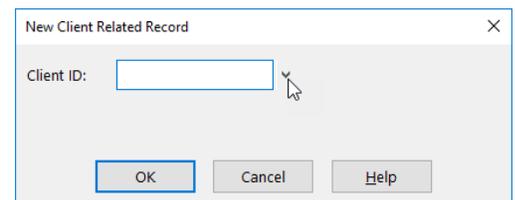
Advanced Field Information

This section provides detailed technical information on each of the fields described on page 2. It offers tips and tricks for fee entry in specific fields to help streamline your data entry process.

1. **Client ID** – This field indicates the client associated with the fee. It cannot be changed after the initial client is set. *(Note: If you want to create a fee for a different client, you must save or exit the current fee and begin a new one for the desired client.)*

2. **Timekeeper** – After creating a new fee, the first editable field is the **Timekeeper** field. This field defaults to the most recently used timekeeper, independent of the client. You can keep the timekeeper as the default, or change the timekeeper using one of the following procedures:
   - Enter the timekeeper's number.
   - Enter the timekeeper's initials.
   - Use the button to open the Timekeeper Lookup window.

   After you save the fee, the timekeeper used will become the default for the next fee entry.

3. **Date** – This field contains the date on which the fee was incurred. It defaults to the system date, but can be changed as needed. You can change this field's value by using one of the following methods.
   - Enter the date.
   - Use the button to open the Calendar window.
   - Use the "<" and ">"keys to decrease or increase the date by one day.

   There are also several keyboard shortcuts that can assist you with the **Date** field:
   - To enter the system's current date, press the "D" key.
   - To clear the date and replace it with "mm/dd/yyyy," press the "C" key.
   - To open the QuickDate Calculator, press the "Q" key. The QuickDate Calculator window can be used to calculate a past or future date based on a specific date.

4. **Tcode** – This field sets the transaction code for the fee. It is used to represent a type of service. The default description is displayed to the right of the **Tcode** field. You can set the Tcode by entering the Tcode number, the Alpha Code or by using the button to open the Transaction Code Lookup window.

5. **Phase/Task** – This field is only available if the client is set up for task based billing. It classifies the billing phase associated with the fee. You can set the field's value by entering the task code or using the button to open the Task Code Lookup window.

6. **Activity** – This field is only available if the client is set up for task based billing. It represents the activity that was performed. You can set the field's value by entering the activity code or using the button to open the Lookup window.

7. **Hours Worked** – This field indicates the number of hours a timekeeper worked on a transaction. The Hours Worked is recorded in decimals (e.g., 1 hour and 15 minutes would be recorded as 1.25). You can record the number of hours in one of the following ways:
   - Enter the number of **Hours Worked**.
   - Use the "<" and ">" keys to increase or decrease the value by one hour.

8. **Hours to Bill** – This field's value defaults to the value of the **Hours Worked** field and is used in calculating the **Amount**. Changing the default **Hours to Bill** creates a write-up or write-down in Tabs3 Billing and is tracked as such in the productivity reports. The number of **Hours to Bill** is recorded in decimal format (e.g., 2 hours and 45 minutes would be recorded as 2.75).

9. **Rate** – This field represents the hourly rate that will be used for the fee. If you are integrating with Tabs3 Billing, the default rate from Tabs3 Billing is used. *(Tip: The value for this field can be overwritten by simply changing the value.)*

10. **Amount** – This field indicates the amount of the transaction. It is automatically calculated by multiplying the number of Hours to Bill by the Rate. *(Note: A credit entry is made if the number of Hours to Bill is negative.)*

11. **Description** – This field is used to describe the transaction. The description field may have already been started based on either the Tcode or Activity. You can edit or delete the description as needed. Right-clicking in the field and choosing Find from the shortcut menu or pressing Ctrl + F will open the Find window allowing you to search for text within the description. *(Tip: You can help streamline data entry by using text macros. You can also automatically insert the description from the previously saved transaction by pressing F2 or right-clicking in the field and choosing* **Previous Description***.)*

12. **Category** – This field is used by Tabs3 Billing to classify fee services into related groups (typically an Area of Practice) for generating reports by category of work. You can change the Category field value using one of the following methods.
    - Use the ⌄ button to open the Category Lookup window.
    - Enter the category code (e.g., "60" for "General Litigation").

13. **User ID** – This field indicates the user who entered the fee. This field cannot be edited.

14. **Bill Code** – This field indicates the billing and printing status. The default value for this field is based on the transaction code's default billing and print status from Tabs3 Billing. You can set the value of this field by using the ⌄ button and selecting the code from the drop-down list.

15. **Date Created** – This field indicates the date that the fee was entered. This field cannot be edited.

16. **Rate Code** – When integrating with Tabs3 Billing, this field can be used to override the default rate. The default value for this field is "0". You can set the value of this field by using the ⌄ button and selecting the code from the drop-down list.

17. **Sales Tax** – When integrating with Tabs3 Billing, this field indicates if a fee is taxable and if so, the sales tax rate to apply. The default value for this field is based on the sales tax rate code specified in the Client file of Tabs3 Billing. You can set the value of this field by using the ⌄ button and selecting the sales tax from the drop-down list.

Convert Records to Fees

At the end of a billing period or at any other time, you may want to convert your calendar, journal, and document management records to fees. The following sections explain how to do this.

Converting Calendar Records to Fees

Often times, you will want to take a calendar record and create a fee for it. You can do this in just three easy steps.

1. From the Calendar, select and open a calendar record. Any of the following methods will accomplish this.
    - Double-click on a calendar entry in the Event Calendar or Task List.
    - Select the entry in the Event Calendar or Task List and press Enter.
    - Right-click on an entry in the Event Calendar or Task List and choose **Edit Selected Record.**

2. When the record is open, click the ⌄ icon to expand the Take Action group of the Quick Clicks pane. Choose Convert To Fee, as shown in the figure on the right.
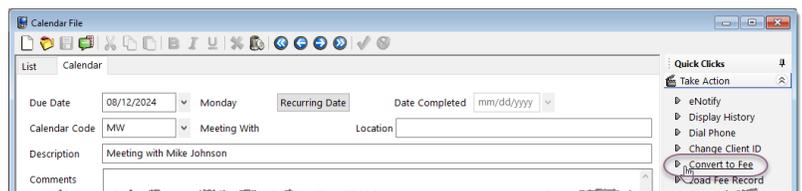

3. A Fee window will be displayed and populated based on the information in the calendar entry. If there is not a Client ID associated with the calendar record, you will be prompted to choose a client. Once you have verified all the information, simply press Ctrl + S to save the fee.

Converting Journal Records to Fees

When it is time to send out bills, you may want to convert your journal records to fees (i.e., notes, emails, phone tasks, time tasks, and research tasks). This is a quick and convenient way to bill for your journal records. Just follow the instructions below.


1. Open the journal record you want to convert to a fee by either double-clicking it, or selecting it and pressing Enter.

2. From the Client file, open the Journal tab.

3. When the record is open, click the icon to expand the **Take Action** group of the Quick Clicks pane.

4. Choose **Convert To Fee**, as shown in the figure on the right.

5. The Fee window will be displayed and populated based on the information in the Journal record.

6. Verify the fee information, make any necessary changes, and press Ctrl +S to save the fee. It's that easy!
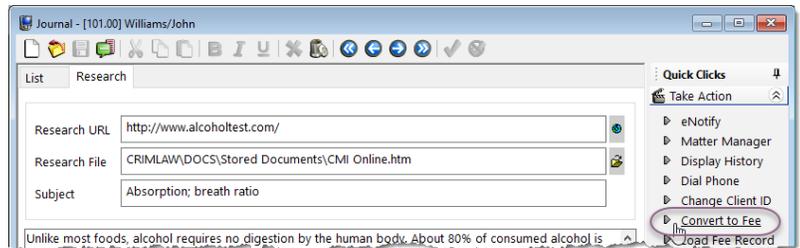
Converting Document Management Records to Fees

You may want to convert document management records to fees so that you can bill for the time it takes to create and edit client documents. Just follow the instructions below.

1. From the Client file, open the **Document** tab.

2. Open the Document Management record you want to convert to a fee by either double-clicking it, or selecting it and pressing Enter.

3. When the record is open, click the icon to expand the **Take Action** group of the Quick Clicks pane.

4. Click **Convert To Fee**, as shown in the figure on the right.

5. The Fee window will be displayed and populated based on the information in the Document Management record.

6. Verify the fee information, make any necessary changes, and press Ctrl +S to save the fee.
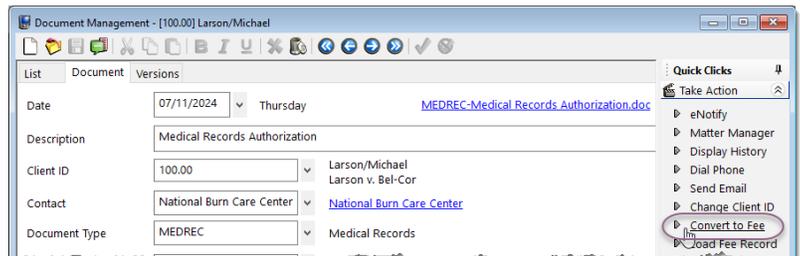
Convert to Fee Settings

PracticeMaster lets you define the defaults to use when converting different types of records to fees. In the Convert to Fee Settings window, you can set defaults for converting calendar entries, emails, notes, phone records, research records, timer records, and documents. You can optionally set a default transaction code, timekeeper, and description for every record type; however, each record type also offers different settings to define.

▶ **To set default Convert to Fee settings**

1. In the Quick Launch, search for and select "Convert to Fee Settings."
2. Select the desired defaults for each tab (record type).
3. Click **OK**.