Osprey Approach: Running a Billing Guide

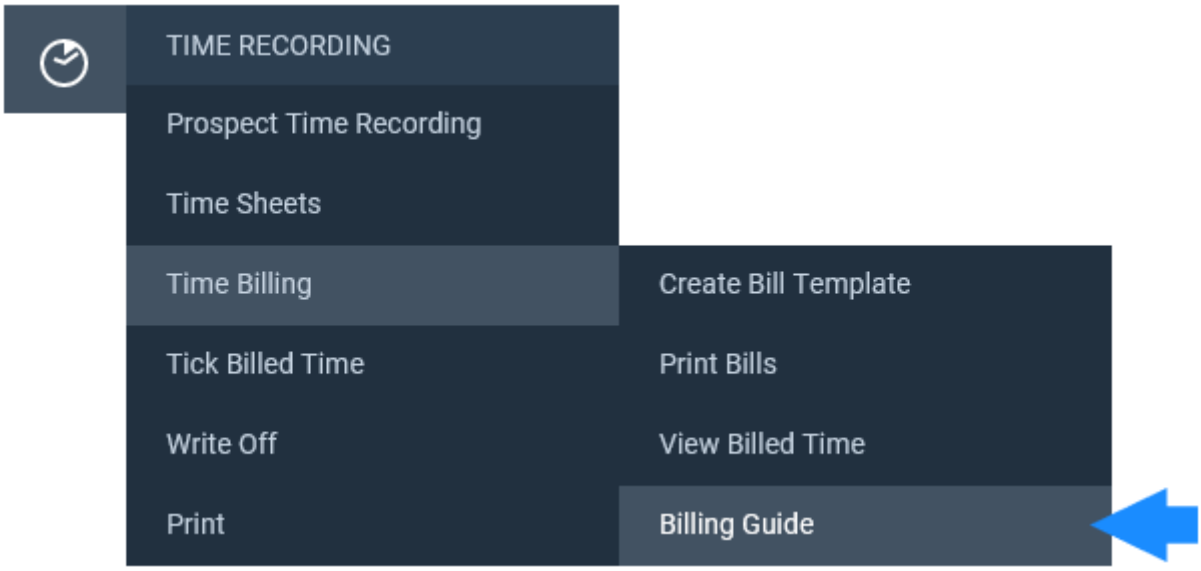
This help guide was last updated on
Jun 1st, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=567

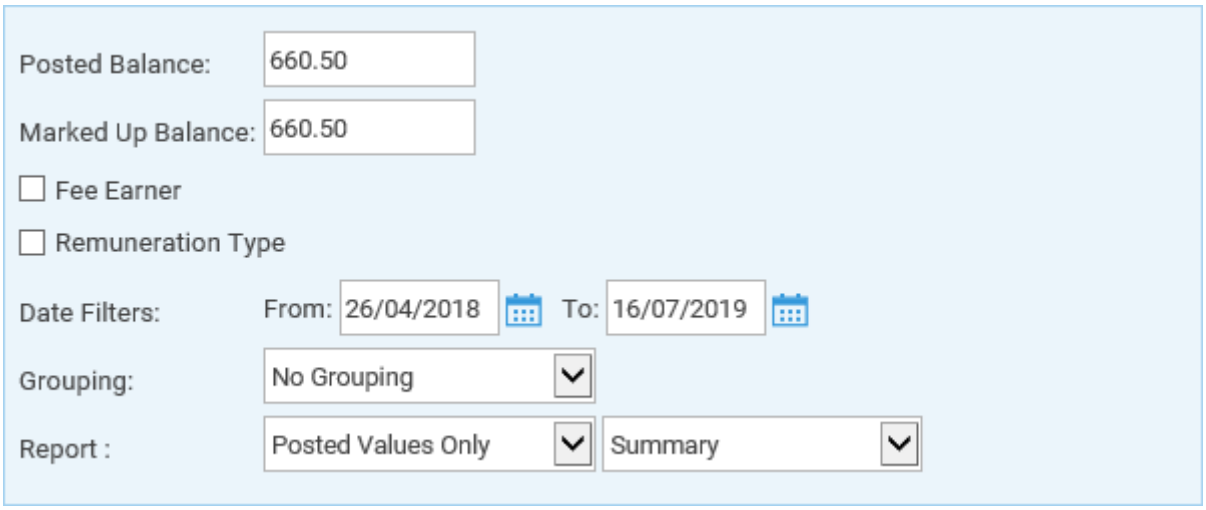
If you would like to run either a detailed billing guide, or a summary of the billing guide, follow the instructions here to assist you in producing the relevant reports.

The billing guide should be printed as the breakdown for the bill before it is posted. It will provide you with details of all unbilled time and unbilled disbursements for the client and matter selected.

To run a billing guide, go to the Time Recording area in the side menu and then select Time Billing. Now click on Billing Guide.



The billing guide filters for the currently selected client will open. You may select an alternative client using the available search options.



You will be able to see both the posted and marked up value should this be applicable You may also filter by Fee Earner and remuneration type if you wish.

Tick the Fee Earner or Rem Type boxes to open the relevant areas for further filtering.

The Fee Earner check box only needs to be selected if more than one Fee Earner has recorded time on a matter and you are just running a billing guide for one or more specified Fee Earner. If printing everything, this can be left unchecked.

Similarly, the ‘Remuneration Type check box can be left unchecked to view all. If you wish you may select the ones you wish to view.

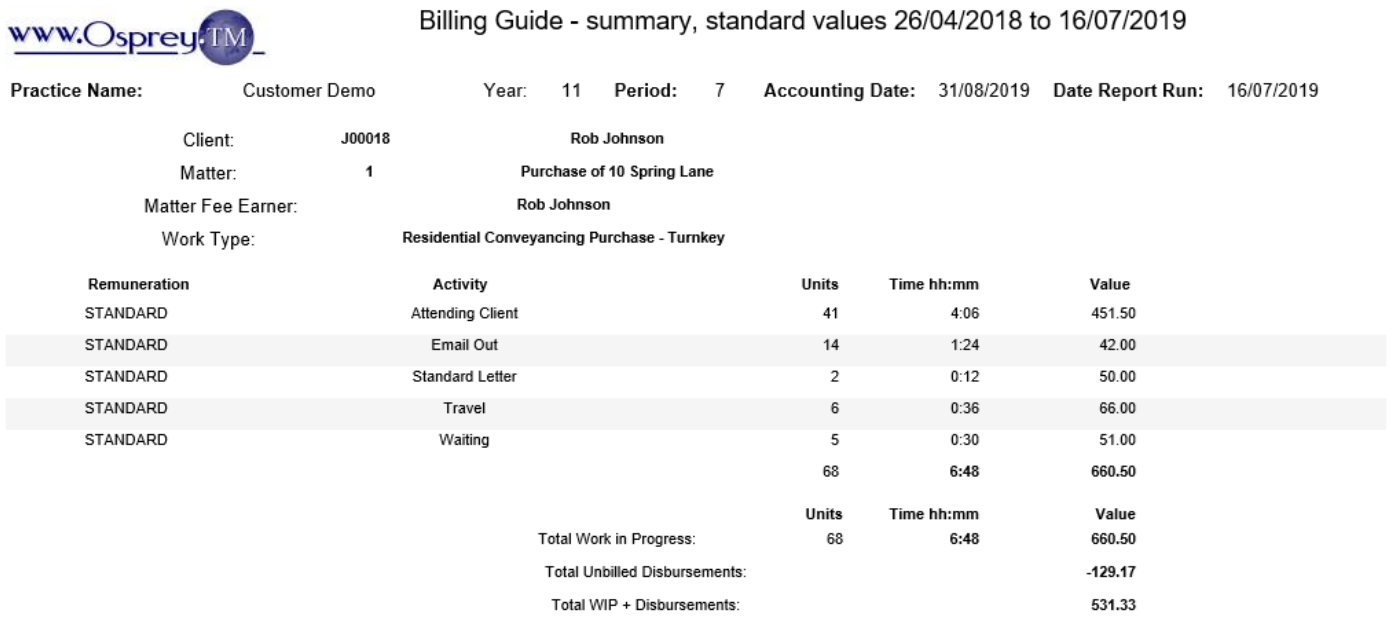
The date filter can also be used should you wish to bring through information between certain dates. The date range will show the first and last time posting on the currently selected client's time ledger.

The guide can be grouped by Fee Earner

Posted values is the default selected report type, however if there is marked up time present, you have the option to either report on marked up values only or to report on both posted and marked up values.

You can also bring through a summary, detailed report or you can combine the two.

Select Print.



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Billing Guide - summary, standard values 26/04/2018 to 16/07/2019

Practice Name: Customer Demo Year: 11 **Period:** 7 **Accounting Date:** 31/08/2019 **Date Report Run:** 16/07/2019

Client: J00018 Rob Johnson
Matter: 1 Purchase of 10 Spring Lane
Matter Fee Earner: Rob Johnson
Work Type: Residential Conveyancing Purchase - Turnkey

Remuneration	Activity	Units	Time hh:mm	Value
STANDARD	Attending Client	41	4:06	451.50
STANDARD	Email Out	14	1:24	42.00
STANDARD	Standard Letter	2	0:12	50.00
STANDARD	Travel	6	0:36	66.00
STANDARD	Waiting	5	0:30	51.00
		68	6:48	660.50

	Units	Time hh:mm	Value
Total Work in Progress:	68	6:48	660.50
Total Unbilled Disbursements:			-129.17
Total WIP + Disbursements:			531.33

The first report to appear will be the detailed view. You can scroll through further pages if any are present using the arrow icons at the top of the window.

You may export any of these reports to Excel or PDF document. To move to the second report, select the chevron facing right in the top corner.



This report is showing a summary of the time. Clicking the chevron again will now take you to the final report which will show you any unbilled disbursements present on the ledger.

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Billing Guide - Unbilled Disbursements on Ledger

Practice Name: Customer Demo **Year:** 11 **Period:** 7 **Accounting Date:** 31/08/2019 **Date Report Run:** 16/07/2019

Client: **J00018** Matter: **1**

Date	Detail	Reference	Vat	Disbursement
22-Aug-18	Test	WO2808	0.00	-29.17
01-Dec-18	bill	th	20.00	-100.00
		Total Unbilled Disbursements Excluding VAT:		-129.17

When you have finished with the report, click on the 'X' to close the window.