

Billing Module – First Class Remuneration Tool

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Billing Module – First Class Remuneration Tool

CPA Inprotech is the most complete IP and practice management solution available in the market. The Billing Module provides the power and flexibility to help you reduce errors and increase your profits.

The Billing Module handles the complicated tracking and invoicing tasks performed by IP attorney firms, including foreign currency, agent fees, and disbursements, yet its powerful features deliver accuracy and increased productivity.

It brings additional value to IP attorney firms by building a knowledge base of your invoicing procedures, automating these procedures, and then using the data collected to help you fully manage billing functions.

For example, the system records information about standing instructions:

- Who receives the invoice and statement
- What format is required (including language, and number of copies be produced)
- To whom it should be sent
- Currency of billing
- Applicable discount policies
- Number of copies to be produced

Key features

Flexible billing

The flexibility of the Billing Module enables employees to operate in a way that suits their own and their firm's way of working depending upon the rules that are set.

For example, the automated process can invoice on a regular basis, e.g. monthly, after checking to see that the Work in Progress (WIP) balance is in excess of an agreed threshold. Alternatively, using the WIP review screen, all cases for a specified client, or all those belonging to a specific attorney, can be reviewed in summary or detail and selected for billing. Once selected, all cases intended for the same client can be billed together, or individually (depending upon the instructions that the client has given). By contrast, bills can be raised individually by attorneys, or billing staff on an ad hoc basis.

On-line invoicing

Use the convenient Billing Wizard to prepare your invoices on-line.

This consists of five steps that allow control over:

- The cases applicable for the bill
- The reference information applicable for both the bill and the statement
- What WIP is to be billed, saved or written off (including capturing a reason for write offs for later management analysis)
- The format of the bill for the client, including the level of detail and consolidation as well as the narratives applicable
- Adjustment of foreign currency amounts and the application of prepaid monies to the bill

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For paper-oriented users, the Billing Worksheet, listing all of the WIP, can be used as a simple input document for creating and adjusting bills on-line.

The Billing Module also caters for special billing requirements such as bills for work for a client unrelated to a case. The billing can also be split over multiple debtors, such as a joint venture work.

Work in Progress (WIP)

The Billing Module is unique in the world of IP management software because it allows for the management of time and expenses through a work in progress ledger. This ledger allows expenses to be captured at source, dramatically improving the chances of recording the amounts accurately and hence improving billing and profitability.

Time and expense data can be captured through the Timesheet Module; standard fees and charges can be created by the Fee Generation & Fees List Module and associates charges can be captured via the Accounts Payable Module. Due to the integrated nature of the system, all of these items are immediately available in the WIP ledger for review and billing. An import function in the Billing Module also allows the electronic capture of transactions from other systems into the WIP ledger, e.g. photocopier and fax costing systems.

If the transactions are entered into WIP, they can be reviewed on screen in real-time, or by report, and evaluated by age, attorney, office, client, etc.

WIP transfer

Easily correct erroneous charges when WIP has been wrongly charged to a case or client. Corrections can then be easily transferred to the appropriate case or client.

Currency

Define the currency that the client would like to be billed in and easily handle such complicated calculations as currency conversion commissions, rounding and consolidation.

Set discounts for specific clients. If the Quotation Module is used, this can be reconciled during the billing process where pre-payments can be automatically applied against an invoice.

Approval

Ensure against double billing and premature billing with this WIP safeguard. Once the draft bill is complete, WIP is locked to prevent double billing, but the bill is not yet approved or issued until its final release. Depending on the firm's policy, approval can be an automatic process, but typically the bill will be reviewed by the staff. If required, the draft bill can be amended or deleted. Once approved, the invoices are printed and locked. WIP items are removed from the section. If the Accounts Receivable Module is used, these invoices are added immediately to the debtors ledger.

In the case where errors are found in invoices which are already completed, the WIP is reinstated, the transactions are rolled back, and records are made available for re-billing.

The Billing Module can be configured for ad valorem taxes such as VAT in Europe, GST in Australia and National and State taxes in the USA.

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Reports

Stay current with a wide variety of on-demand and automated reporting formats and options. These include full work history, summary and the capability to run drill down enquiries on invoices. It also features a very flexible revenue analysis enquiry tool, and WIP based reports include flexible time analysis for the firm as a whole, aged work in progress and write off analyses.

Integration

Consolidate the Billing Module with the Accounts Receivable and General Ledger Modules to achieve a new level of integration. For firms wishing to use third-party products, there is a configurable Financial Interface. This allows invoices and associated General Ledger transactions to be created and written to interface tables for transfer to third-party to the General Ledger and Accounts Receivable systems.

About CPA Software Solutions

CPA Software Solutions, part of the CPA Group, is a leading provider of IP management software for companies and IP attorney firms worldwide. We deliver the most advanced, innovative and configurable solutions available, designed specifically to fit your individual needs.

Together with CPA, we provide more than 40,000 businesses with IP management software solutions; patent, design and trademark renewals; domain name management; and trademark searching and watching.