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11 tools to optimize your business

Tool #4: Activity Tracking and Management

advantages of XIRA's activity tracking and management

1. prevents losses on billable hours due to inadequate activity tracking practices

2. keeps attorneys and their clients accountable in terms of allocation of billable hours

3. facilitates timelier payments as it is easy to track dates and tasks pertaining to invoices created in GAVEL

4. provides visibility to case data for future costing/ estimation

Remember the old adage "time is money"? What does time mean to attorneys? Billable hours. As much as attorneys hate tracking their time, there's something about knowing that you're on track to make money by working more efficiently and also recognizing how distractions impact client satisfaction…and your profitability.

XIRA's activity tracking and management

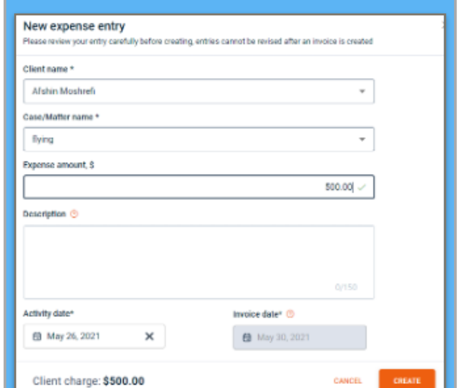
XIRA's GAVEL platform contains a complementary, integrated, activity tracking and management tool that enables attorneys to record activities in real time. Never worry about re-constructing time spent or work performed on a client's case.

Our activity tracking and management functionality provides solo-small law practitioners with:

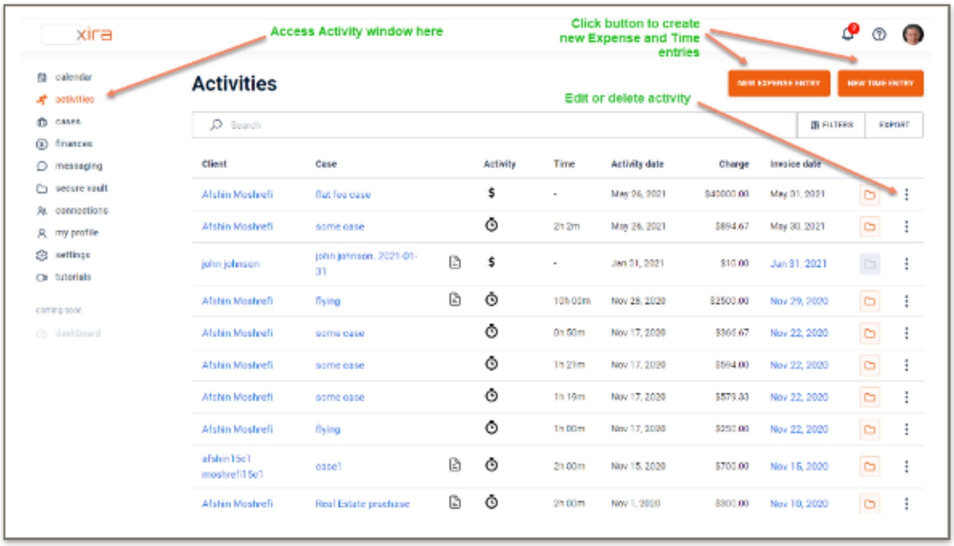
- real time activity integration with our case creation and management functionality (clients are automatically billed based on case fee type and invoice frequency selected during case creation)
- ability to create time entry and/or expense entry activities for each case
- online access to accurate time records when you are on-the-go
- ability to adjust times prior to finalizing invoices
- transparent view of billable time records.

activity tracking

- "NEW EXPENSE ENTRY" lets you bill for your expenses related to a client's case.
- "NEW TIME ENTRY" lets you bill for time spent on activities performed for the client's case.
- time entries are entered as hours and minutes.
- when you initially registered, you set up a default standard hourly rate by practice area. However, an hourly rate can also be established for each specific case. When creating a new case, the default practice area hourly rate is auto populated, but you can change it. Then, when you create a time entry activity, the hourly rate you entered for the <u>case</u> is auto populated; and this in turn can be changed for the activity.



expense entry form



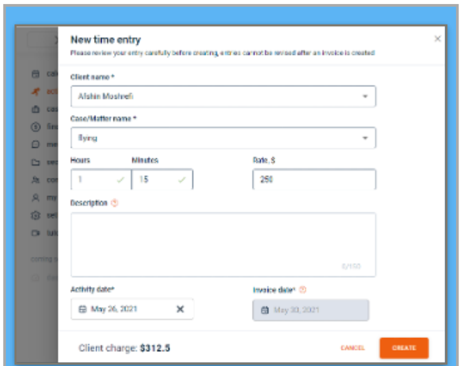
how it works

We've made it easy for you to start recording and managing your activities for new or existing clients. Here are the steps to create a new activity:

1. log in and select "activities" tab (person running icon). The activity window displays all created activities sorted by activity date, but can be reordered by clicking the different column headings.

2. to create an expense activity, click orange "NEW EXPENSE ENTRY" button in upper right hand corner. Expense entry activities are used to charge a client for expenses incurred by you for their case.

   - type registered client's name in "Client name" dropdown menu. You can also add an existing client by creating a new case in the "cases" (briefcase icon in left navigation menu) and then click "ADD CLIENT".
   - select "Case/Matter name" in the dropdown menu (Note: if this is the first case for the client, there will be only one entry that is auto populated for you). After the name of the case is entered, the window expands for additional details to be entered.
   - enter "Expense amount, $" along with a description of the expense. (Note: the description you enter for the activity will be included on the client's invoice)
   - set "Activity date" (if activity was performed other than on current date).
   - set "Invoice date". If grayed out, the invoicing method for the case was set to "Periodic invoicing" during case creation.
   - select the orange "CREATE" button at the bottom. You've now created either an expense or time entry activity. (Note: you can still make changes to the activity prior to the invoice date, by selecting the three ellipses next to the specific activity you want to change, then select "edit" or "delete". However, once the invoice is sent out, it is no longer editable)



time entry form

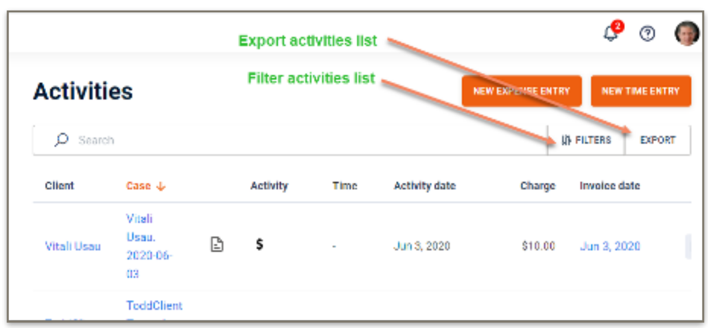
3. to create a time entry activity, click orange "NEW TIME ENTRY" button in upper right hand corner. Time entry activities are used to enter billable time spent working on a client's case. Follow all the steps above with one difference:

   - instead of entering "Expense amount, $", enter the amount of time spent for the activity in the "Hours" and "Minutes" fields.
   - when a new case is created, the default practice area hourly rate is auto populated, but you can change it. Then, when creating a time entry activity, the hourly rate is auto populated based on what you set in the case creation form. However, you can again update the hourly rate for the activity.

4. to access activities on your mobile device, login to XIRA from your mobile browser. From the browser web screen, the activity window with all its features can be accessed.

filters

Quickly find what activities you are looking for or want to export by using the "FILTERS" button at the top of "activities" screen. You can filter by activity type (time, expense, or all), client or case name, invoice status (generated, not generated, or all), or for a desired date range (when activity was created or when the invoice was created).



FILTERS and EXPORT buttons

accounting and tax preparation

All activities recorded on XIRA can be downloaded by clicking the "EXPORT" button on the activity page. When exported, the activities list containing detailed information about each activity and expense is downloaded as an Excel file. The downloaded spreadsheet can be used to import to other accounting and tax preparation packages.

You are now an expert at using XIRA's
activity tracking and management functionality!

have questions?
for any other questions you may have, send an email to
info@xira.com

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mobile app now!

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