

11 tools to optimize your business

Tool #7: Invoicing + e-Delivery



advantages of XIRA's invoicing + e-delivery

1. reduces time spent creating and calculating invoice amounts, as well scrutinizing and modifying invoices prior to sending
2. eliminates having to remember to manually send out invoices at regular intervals
3. ensures clients can quickly receive and view invoices
4. increases visibility of past due invoices with reminders for you and your clients

The life source of your law firm is being able to consistently invoice clients in order to establish a steady cash flow and build a strong financial foundation for your practice. Yet, 36% of firms don't use legal billing software. Even if your firm is just starting out, you can find a billing system that is extremely affordable, intuitive, aligns with your needs, and makes it easier to scale as your practice grows. Preparing an invoice for a client doesn't have to be a cumbersome administrative task if you have the right invoicing software that automates how you bill clients, and improves timely payments over time.

XIRA's invoicing + e-delivery

XIRA's cloud-based platform, GAVEL, contains an integrated invoicing and e-delivery capability that enables attorneys to generate invoices based on billable activities and expenses, and then electronically emails them to clients.

With our invoicing and e-delivery capability, solo-small law practitioners can:

- track time and expenses, and then invoice directly within the same platform
- maintain a consistent, automated, billing schedule
- accept partial payments from clients
- download invoices as a PDFs

invoice frequency options

- **invoice by date:** allows you to enter a specific billing date associated with each activity you record. All activities and expenses (per client per case) with that specific billing date are grouped together into a single invoice.
- **periodic invoicing:** attorneys typically invoice monthly, or even less frequently, which can cause “invoice shock” for clients. Periodic invoicing enables you to bill either at the end of every week or end of every month, making it easier for clients to make smaller payments as the case progresses. All activities and expenses are automatically collected into a single invoice and sent to the client (either weekly or monthly). The invoices are sent at midnight (Pacific Time) on the last day of the week or the month.

- process debit/credit adjustments prior to sending invoices; or ability to adjust invoices later on (e.g. adding a charge for a NSF cheque)
- export invoice history to Excel to conduct a profitability analysis or upload in an accounting package
- view invoice payment or overdue status.

case creation and activity tracking

You have clients in XIRA. You have created cases for them in XIRA, and entered activities and expenses that reflect what you have done for each client’s case. Now, you need to invoice them and get paid for your efforts. With XIRA, you can also bill your clients without ever having to leave the GAVEL platform!

We’ve already covered case creation and management as well as activity tracking and management in depth and will avoid rehashing all the details here. However, we’ve highlighted a few steps in the process because it is important to understand how all the features and functionality in GAVEL work together to provide a seamless practice management platform for your firm.

- **invoice frequency:** When you first created a client’s case, you defined the invoice frequency mechanism: invoice by date, or periodic invoicing (see side bar). This enables you to maintain a consistent invoicing schedule. Plus, you no longer need to set calendar reminders to manually create send invoices to your clients!

Note: The invoicing frequency depends of course, on the case type (time and expense, contingency, or flat fee cases). For instance, for flat fee cases, you can establish a schedule of milestone payments, up to the total amount agreed to with the client. The scheduled can be defined at the time of case creation or defined as the case progresses.

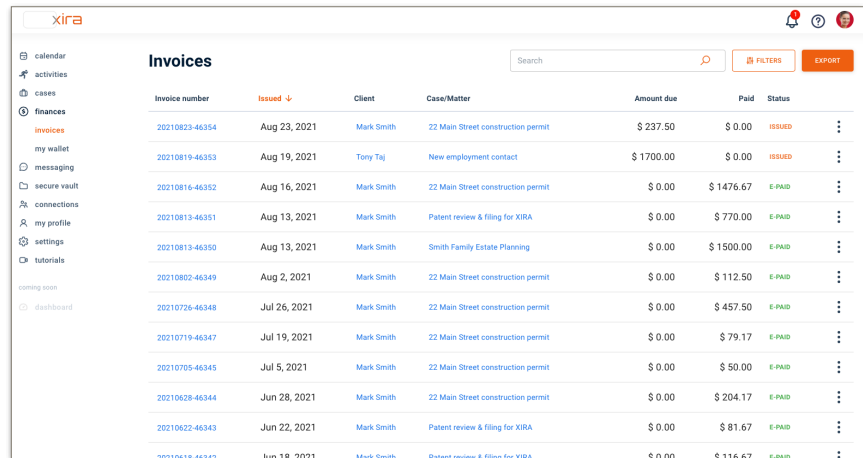
- **activities:** XIRA’s innovative invoicing capability automatically generates invoices for all activities and expenses entered for a client’s case. Thus, there is no further effort required on your part for invoicing once an activity has been recorded.

An attorney must carefully enter their activities and expenses because these entries carry over to the invoices clients receive. Entering a clear, simple, yet detailed description focusing on the benefit for each activity/time/expense, provides clarity and value for the services rendered. It also helps reduce disputed charges or clients ignoring the bill completely – leading to timelier payments.

Once this is done, and the billing approach has been set, GAVEL takes over and makes the rest of the process effortless. GAVEL examines the activity list daily and generates an invoice for all the entries identified as “due”. An invoice, single or multipage, is prepared per client and per case. The invoice is then automatically emailed to the client.

invoice components

- **Invoice number:** a unique number defined by XIRA platform.
- **Date:** date the invoice was issued.
- **To/From header:** name and address of your client as well as your contact info is in the header.
- **body:** the body of the invoice consists of two parts: time charges for activities performed and expense charges (if expenses are captured for the case). Each activity detailed in this section is based on what was entered when the activity was originally recorded.
 - Date: when the activity was performed
 - Description: captures activity done on the client's behalf. WARNING: the text entered for the activity is reflected verbatim in this section. Therefore, it is important to describe the effort in a clear and concise manner.
 - Time and Rate: for each activity, the time spent and the standard hourly rate applied is reflected here.
 - Amount: time multiplied by rate. For each expense, the total amount is reflected.
- **footer:** contains the Subtotal, the amount of entire invoice



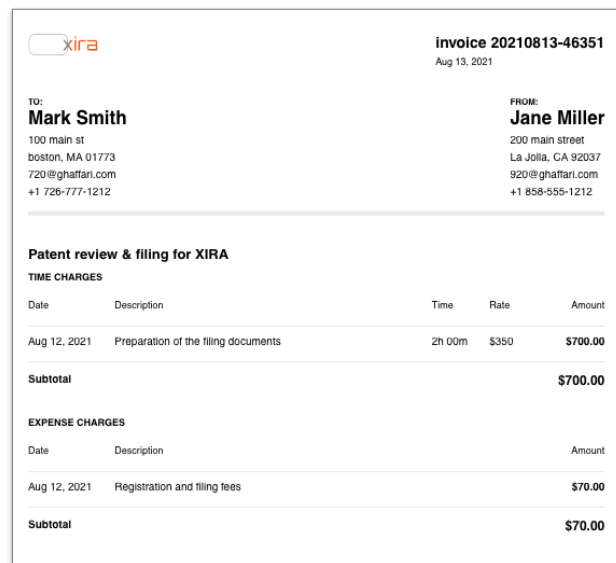
Invoice number	Issued	Client	Case/Matter	Amount due	Paid	Status
20210823-46354	Aug 23, 2021	Mark Smith	22 Main Street construction permit	\$ 237.50	\$ 0.00	ISSUED
20210819-46353	Aug 19, 2021	Tony Taj	New employment contract	\$ 1700.00	\$ 0.00	ISSUED
20210816-46352	Aug 16, 2021	Mark Smith	22 Main Street construction permit	\$ 0.00	\$ 1476.67	E-PAID
20210813-46351	Aug 13, 2021	Mark Smith	Patent review & filing for XIRA	\$ 0.00	\$ 770.00	E-PAID
20210813-46350	Aug 13, 2021	Mark Smith	Smith Family Estate Planning	\$ 0.00	\$ 1500.00	E-PAID
20210802-46349	Aug 2, 2021	Mark Smith	22 Main Street construction permit	\$ 0.00	\$ 112.50	E-PAID
20210726-46348	Jul 26, 2021	Mark Smith	22 Main Street construction permit	\$ 0.00	\$ 457.50	E-PAID
20210719-46347	Jul 19, 2021	Mark Smith	22 Main Street construction permit	\$ 0.00	\$ 79.17	E-PAID
20210705-46345	Jul 5, 2021	Mark Smith	22 Main Street construction permit	\$ 0.00	\$ 50.00	E-PAID
20210628-46344	Jun 28, 2021	Mark Smith	22 Main Street construction permit	\$ 0.00	\$ 204.17	E-PAID
20210622-46343	Jun 22, 2021	Mark Smith	Patent review & filing for XIRA	\$ 0.00	\$ 81.67	E-PAID
20210618-46342	Jun 18, 2021	Mark Smith	Patent review & filing for XIRA	\$ 0.00	\$ 116.67	E-PAID


attorney invoices view

how it works (attorneys)

We've made it easy for you to quickly view your invoice history as well as the details for specific invoices. Here are the steps to view and manage invoices:

1. log in and select "finances" tab (dollar sign icon).
2. click on "invoices". You will see all the invoices created by XIRA on your behalf and sent to your clients.
3. click on an invoice number to see details of a particular invoice (see side bar).
4. you can also click on the three ellipses to the right of each row to: view invoice details, download the invoice to a PDF, record a transaction, and write-off the invoice.





invoice 20210813-46351
 Aug 13, 2021

TO:
Mark Smith
 100 main st
 boston, MA 01773
 720@ghattari.com
 +1 726-777-1212

FROM:
Jane Miller
 200 main street
 La Jolla, CA 92037
 920@ghattari.com
 +1 858-555-1212

Patent review & filing for XIRA
TIME CHARGES

Date	Description	Time	Rate	Amount
Aug 12, 2021	Preparation of the filing documents	2h 00m	\$350	\$700.00
Subtotal				\$700.00

EXPENSE CHARGES

Date	Description	Amount
Aug 12, 2021	Registration and filing fees	\$70.00
Subtotal		\$70.00

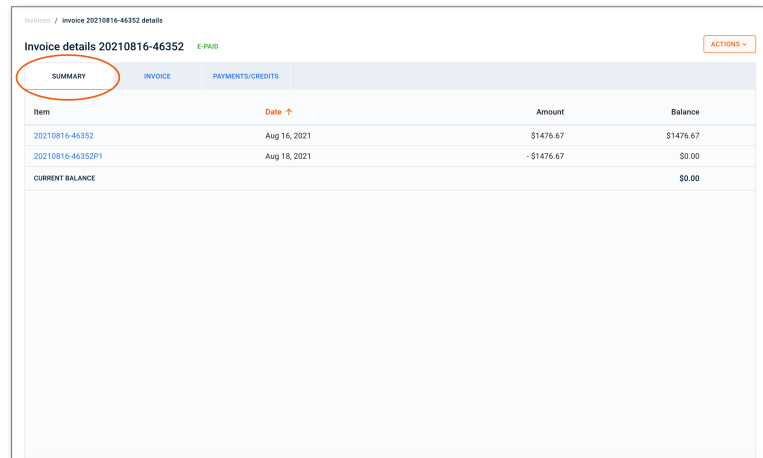
sample invoice

PDF format

Invoices can be downloaded/ exported to a PDF at any time should you need to physically mail them to your clients.

Simply, select the three ellipses on the right-hand side of the "Invoices" screen or select "ACTIONS" when you are in the "Invoice details" screen.

The first page of the PDF details all the transactions performed on the invoice. The next page contains the original invoice, followed by a unique page for each additional transaction entered against the invoice.



Invoice details 20210816-46352 E-PAID			
SUMMARY			
Item	Date	Amount	Balance
20210816-46352	Aug 16, 2021	\$1476.67	\$1476.67
20210816-46352P1	Aug 18, 2021	- \$1476.67	\$0.00
CURRENT BALANCE			\$0.00

summary invoice screen

invoice details

The "Invoice details" screen contains three (3) tabs: a summary view of transactions against the invoice along with the current balance (see image above), the original invoice statement, and any payments/credits posted to the invoice (see images below). Every transaction entered either by you or via your client's credit card payments, creates a record and updates the electronic invoice document which can also be downloaded as a PDF (see side bar). These updates are also emailed to the client. The invoice number associated with each additional transaction has a P, C, or D added to the end of the original invoice number to reflect a payment, credit, or debit. There is also a number following the letter to indicate how many times this specific type of transaction was entered against the invoice (see image below).

Invoice / Invoice 20210816-46352 details

INVOICE

ACTIONS

SUMMARY

INVOICE

PAYMENTS/CREDITS

XIRA

Invoice 20210816-46352

Aug 16, 2021

To:

Mark Smith

100 Main St

Boston, MA 02173

7500@grubler.com

+1 708-777-1212

From:

Jane Miller

200 Main Street

La Jolla, CA 92037

8200@grubler.com

+1 619-550-1212

22 Main Street construction permit

TIME CHARGES

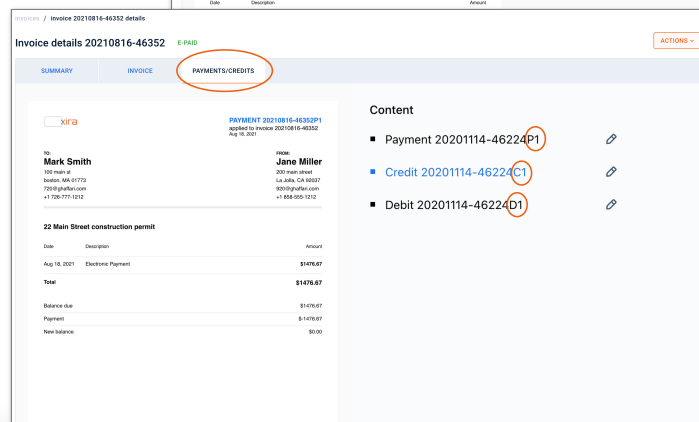
Date	Description	Time	Rate	Amount
Aug 16, 2021	Prep of court documents	01:00x	\$500	\$875.00
Aug 16, 2021	phone call (jan holds email) help office website layout	01:00x	\$500	\$881.67
Subtotal				\$956.67
Date	Description	Amount		

2

E-PAID

PAYMENTS/CREDITS

ACTIONS



Invoice details 20210816-46352 E-PAID			
PAYMENTS/CREDITS			
To: Mark Smith 100 Main St Boston, MA 02173 7500@grubler.com +1 708-777-1212		From: Jane Miller 200 Main Street La Jolla, CA 92037 8200@grubler.com +1 619-550-1212	
22 Main Street construction permit			
Date	Description		Amount
Aug 16, 2021	Electronic Payment		\$1476.67
Total			\$1476.67
Balance due			\$1476.67
Payment			\$1476.67
New balance			\$0.00

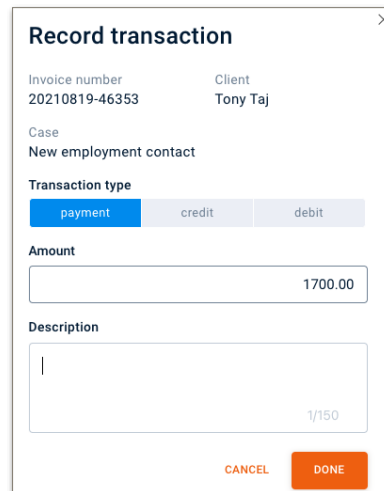
Content

- Payment 20201114-46224P1
- Credit 20201114-46224C1
- Debit 20201114-46224D1

invoice payments and adjustments

GAVEL offers the capability to adjust invoices not only with payments but also with credits and debits. To enter invoice payments or adjustments, access the “record transaction” option for a specific invoice by selecting the three ellipses on the right-hand side of the “Invoices” screen or by selecting “ACTIONS” when you are in the “Invoice details” screen.

A pop-up appears (see below) with the invoice number, client’s name, case name, transaction type, amount of transaction, and a description field to capture the details of the particular financial transaction. Simply choose the transaction type (payment, credit, or debit) and enter the amount of the transaction. Note: the full amount of the invoice is pre-populated in the “Amount” field and can be modified to any amount. However, an amount must be entered. In the case of a debit entry, the amount is recorded as an additional charge to the client. In the case of a client making a payment via credit card (E-Paid), the client is only allowed to pay the full amount of the invoice which is automatically posted in the system and does not require you to manually record a transaction.



The screenshot shows a 'Record transaction' modal window. It contains the following fields and options:

- Invoice number:** 20210819-46353
- Client:** Tony Taj
- Case:** New employment contact
- Transaction type:** Three buttons: 'payment' (highlighted in blue), 'credit', and 'debit'.
- Amount:** A text input field containing '1700.00'.
- Description:** A large text area with a vertical cursor and a '1/150' character count indicator at the bottom right.
- Buttons:** 'CANCEL' and 'DONE' at the bottom right.

The “record transaction” allows the following common transactions against an invoice:

- recording a partial or full payment made by cheque or direct transfer.
- entering a credit for any discounts you may offer a client.
- creating a debit to reinstate an amount because of a cheque payment being returned for NSF + any banking fees assessed.

You can also “Write-off” an invoice if all attempts to collect from the client have failed by selecting the three ellipses on the right-hand side of the “Invoices” screen or by selecting “ACTIONS” when you are in the “Invoice details” screen.

GAVEL will automatically adjust the amount outstanding or paid. The “Status” field on the “Invoices” screen always reflects the actual and true standing of the invoice.

invoice status filter

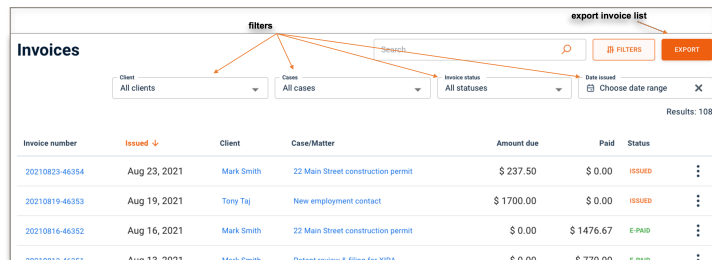
One of the criteria you can use to quickly search for invoices is the "invoice status" filter.

- Issued: date the invoice was generated.
- Failed: a credit card payment was unable to be processed.
- E-Paid: the invoice has been fully paid using a credit card.
- Write-off: you have not been/will not be compensated for legal services performed despite all attempts to resolve with the client. Note: marking an invoice as "Write-off" will not be visible to your client. If the client does pay the invoice in the future, you will need to manually change the status to "Paid".
- Paid: when fully paid by direct transfer or cheque.
- Partial: when client pays only a portion of the total amount due.
- All statuses: comprehensive view of all the above statuses.

filters

Quickly find what invoices you are looking for by using the "FILTERS" button, or when you want to export to an external Excel file, select the orange "EXPORT" button at the top of "Invoices" screen. You can filter by client, case matter name, invoice status (see side bar) and even select a specific date or date range to view specific invoices.

You can also change the look of your invoice page by changing the priority of the column headings you want to view: invoice number, issue date, client name, case/matter name, invoice amount due, amount paid, and status of the invoice.



The screenshot shows the 'Invoices' screen with a search bar and filters. The 'filters' button is highlighted with an orange arrow. The 'export invoice list' button is also highlighted with an orange arrow. The table below shows a list of invoices with columns for Invoice number, Issued date, Client, Case/Matter, Amount due, Paid, and Status.

Invoice number	Issued	Client	Case/Matter	Amount due	Paid	Status
20210823-46354	Aug 23, 2021	Mark Smith	22 Main Street construction permit	\$ 237.50	\$ 0.00	ISSUED
20210819-46353	Aug 19, 2021	Tony Taj	New employment contract	\$ 1700.00	\$ 0.00	ISSUED
20210816-46352	Aug 16, 2021	Mark Smith	22 Main Street construction permit	\$ 0.00	\$ 1476.67	E-PAID
20210813-46351	Aug 13, 2021	Mark Smith	22 Main Street construction permit	\$ 0.00	\$ 770.00	E-PAID

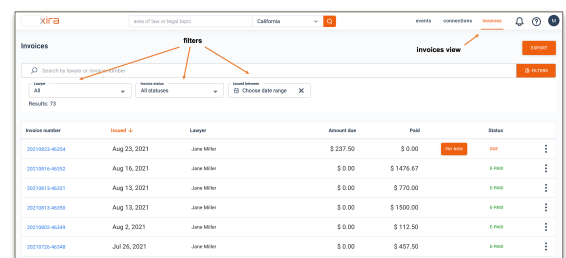
Filters and Export buttons

how it works (clients)

Clients are also able to view and manage their invoices in their customer portal. After logging in, they click the "invoices" tab at the top of the screen. The client's invoice page displays the invoice number (with a link to the invoice details), issue date, lawyer's name, amounts due, amount paid, and invoice status.

Clients have flexible payment options. They can send a cheque, conduct a bank transfer, or pay with a credit card. Note: when paying by credit card (E-Paid), the client is only allowed to pay the full amount of the invoice. Clients simply click the orange "PAY NOW" button to pay via credit card. This takes the client to a screen to either add a credit card, or confirm payment with an exciting credit card they previously added to their profile.

Clients can select the "FILTERS" button to view invoices by lawyer, invoice status (see side bar), and by a specific date or a date range. By selecting the orange "EXPORT" button, clients can also export their invoices to an external Excel file. The three ellipses on the right-hand side of the screen enable the client to view details of an invoice as well as download/export a PDF.



The screenshot shows the 'Invoices view' screen with a search bar and filters. The 'filters' button is highlighted with an orange arrow. The 'export invoice list' button is also highlighted with an orange arrow. The table below shows a list of invoices with columns for Invoice number, Issued date, Lawyer, Amount due, Paid, and Status.

Invoice number	Issued	Lawyer	Amount due	Paid	Status
20210823-46354	Aug 23, 2021	Jane Miller	\$ 237.50	\$ 0.00	ISSUED
20210819-46353	Aug 19, 2021	Jane Miller	\$ 0.00	\$ 1476.67	E-PAID
20210816-46352	Aug 16, 2021	Jane Miller	\$ 0.00	\$ 770.00	E-PAID
20210813-46351	Aug 13, 2021	Jane Miller	\$ 0.00	\$ 1500.00	E-PAID
20210810-46349	Aug 10, 2021	Jane Miller	\$ 0.00	\$ 112.50	E-PAID
20210726-46348	Jul 26, 2021	Jane Miller	\$ 0.00	\$ 457.50	E-PAID

client invoices view

notification indicator

XIRA displays notifications for past due invoices, secure messages, or uploaded documents with a red number next to the bell icon in the browser.



browser notification indicator

a **video tutorial** for invoicing can be found [here](#).

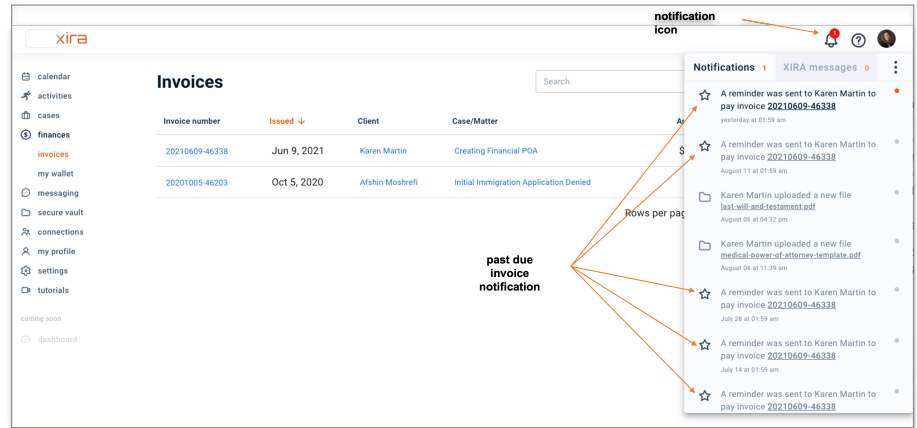
have questions?
for any other questions you may have, send an email to info@xira.com

get XIRA's free mobile app now!



XIRA Connect, Inc.
228 Hamilton Avenue, 3rd Flr
Palo Alto, CA 94301
xira.com

rev. a 9/21



attorney notification view

notifications

XIRA's platform informs you and your clients when invoices are sent, paid, and when they go unpaid. You can check for all past due invoices by going to the "Status" field in the "Invoices" summary screen, or by viewing your notification indicator (see side bar) located at the top of your browser. A star icon with the client's name, invoice number, and notification date will be displayed for past due invoices. You can click on the invoice number link directly from the notification to see the invoice details.

Client invoices are due upon receipt. The GAVEL platform automatically sends a past due email reminder to your client containing the invoice number and an option to "PAY NOW" seven (7) days after the original date of the invoice, and then every fourteen (14) days thereafter until the invoice has been paid.

Now, you are an expert at using XIRA's integrated invoicing and e-delivery capability!

stay current with XIRA's latest activities and media coverage. check out our [press page](#) and like and share our social media pages

