

Handling Billing in Zenas

Steps from creating a report on the data in Zenas to printing it in a bill in WordPerfect.

Generate a report on current unbilled time and expenses by putting the case number into the yellow cell and clicking “Unbilled.”
(This is done automatically by clicking “Get Bill” on the CaseView page, or by pressing Ctrl + Shift + B when the cursor is on a case number.)

The screenshot shows a software interface with the following components:

- Reports Panel:** A list of reports with 'Unbilled' selected. The 'Start' date is 01/01/05 and the 'Case#' is 1934. Other details include Client, Type (Appeal-Land Line), and Fee (\$250).
- Report Summary:** A box titled 'Report: Unbilled' showing:
 - Hours: 8.28
 - Rate: \$250.00
 - Fees: \$2,070.00
 - Costs: \$315.00
 - Total: \$2,385.00
- Financial Summary:** A box showing 'Balances' with 'Prior' at \$0.00 and 'Current' at \$2,385.00. The 'Period starting' date is 02/28/13.
- Time Table:**

Date	Hrs	Work
03/03/13	0.55	
03/03/13	4.08	
03/08/13	0.13	
03/18/13	0.28	
03/18/13	0.65	
03/21/13	0.22	
03/21/13	1.40	
- Costs Table:**

Date	Payee	Purpose	Amount
02/25/13	Supreme Court of Georgia	Filing Fee	\$315.00
- History Table:**

Date	Amount	Ev	Balance
03/18/13		Pay	\$0.00
02/28/13		Stm	

Red arrows indicate the workflow: one arrow points from the 'Unbilled' button to the report summary, and another points from the '0.28' entry in the 'Time' table to the 'Total' value in the report summary.

The screenshot displays a software interface for managing unbilled costs. At the top left, a 'Reports' panel shows 'Unbilled' with a start date of 01/01/05 and a case number of 1934. The client is 'Appeal-Land Line' with a fee of \$250. A 'Report: Unbilled' summary shows 8.28 hours at a rate of \$250.00, totaling \$2,070.00 in fees and \$315.00 in costs, for a total of \$2,385.00. On the right, there are buttons for 'Financial Report (Book)', 'Operating Account', 'Trust Account', 'Record Payment', 'Draft Bill', and 'Final Bill'. A 'Balances' section shows a current balance of \$2,385.00. Below these are three tables: 'Time' (with columns for Date, Hrs, Work), 'Costs' (with columns for Date, Payee, Purpose, Amount), and 'History' (with columns for Date, Amount, Ev, Balance). The 'Costs' table has one entry: 02/25/13, Supreme Court of Georgia, Filing Fee, \$315.00. The 'History' table has two entries: 03/18/13, \$0.00, Pay, and 02/28/13, \$2,385.00, Stm. At the bottom, a navigation bar includes buttons for 'Zenas', 'CaseView', 'Deadlines', 'TimeSheet', 'Bill', 'Contacts', 'Cases', and 'People'. The 'Bill' button is highlighted. The status bar at the very bottom shows 'Zenas.qpw' and system indicators like 'NUM', 'CAPS', 'SCRL', and 'READY'.

Make changes and corrections under Time and Costs, since these items will appear in the final bill. When done, click the Final Bill button to generate a Final version of the bill.



A list of all Actors on the case pops up. Select the one who gets the bill and click OK.

A final version of the bill appears in WordPerfect:

Casey M. Casey, III
Attorney at Law
Post Office Box 1041
Macon, Georgia 31203-1041
Telephone 478/745-0224
E-Mail casey@caseylaw.com

April 14, 2012

We would like to return the enclosed bill to you.

Statement for Legal Services Provided
Client: Eric Conroy
Matter: 374

Bill Hours at \$200.00: \$2,000.00
Over: \$200.00
Total amount due for period starting 02/28/12: \$2,200.00
Prior balance: \$0.00
Total amount due (Page 12 of 25-4-2012): \$2,200.00

Detailed Description:

Item	Hours	Rate	Amount
020212	0.25		
020212	4.75		
020212	0.25		
021212	0.25		
021212	0.25		
022112	1.40		
022112	0.20		
022212	0.40		
022212	0.20		
Total	8.20		

Case:

Note:

If instead of clicking “Final Bill,” you clicked “Draft Bill,” Zenas would have gone through the same steps to generate the same statement in WordPerfect.

Zenas would not, however, have marked each of the time and cost items as billed, and it would not have entered the billing into the database on the billings page. Use the Draft option when you want to see how the bill will look, but use “Final Bill” when the version going to the client is to be prepared and recorded.