

Using Description Codes

Description Codes: (Interbill also offers Task, litigation and activity codes for specialty billings like Ledes).

Description Codes are a quick way of entering fee or cost description. Codes can be used for other types of entries like payments, trust, retainers and manual late payment charges but 99% of the time they are used to describe fee and cost entries.

Description Codes can have a different hourly rate than the client hourly rate or they can have a flat rate.

Description Codes can be up to 10 alphabetic or numeric characters but the shorter the easier to use. They can expand into descriptions of any length. Often a short paragraph.

Description Codes are also used to provide a standard & professional way of describing fee and cost activity.

1. To create a new code, in Log select the Code tab and then press the New Description Code button. You can use the search button to check for code duplicates.

2. To change code description, in the code screen, search for the code, check the corresponding Select box, change the code description and save. (Remember description can be any length).

3. To change the code itself, in the code screen, search for the code, check the corresponding Select box, change the code and save.

4. To delete the code and description, in the code screen, search for the code, check the corresponding Select box and press the Delete Selected button.

5. To print codes, in the code screen, press the Print Codes button.

6. To Create an Hourly Rate Code, in the code screen, select the Hour Rate Code tab and press the New Hourly Code button. To change or delete an Hourly Rate Code see para 2, 3 and 4 respectively.

7. To create a Flat Rate Code, in the code screen, select the Flat Rate Code tab and press the New Flat Code button. To change or delete a Flat Rate Code see para 2, 3 or 4 respectively.

End