

LawTime user manual

Version 2.7

Heidi Hansar

Copyright © 2010 Van Zoig

Contents

Starting LawTime	5
LawTime small window	5
Timing	6
Starting the timer	6
Enter the data	6
More possibilities	7
Main window	9
The structure of main window	9
Work with tables	10
Activities – viewing measured work	13
Viewing options	13
Calendar	13
Table	13
Filtering activities	15
Flag the activities ready to bill	17
Create a view	18
Bill status	19
Customers	19
Adding customers and viewing data	19
Customer data	20
General	20
Details	21
Cases	22
Prices	22
Invoices	23
Documents	23
Case	23
Adding case and viewing data	23
Case data	24
General	24
Details	25
Prices	25
Tasks	25

Invoices	25
Documents	
Invoices	
Adding and viewing invoice data	
Invoice window	
Rows	27
Adding billed work to invoice	27
Invoice delivery	
Invoice commands	
Payroll	
The structure of the table	
Payroll settings	
Prices	
Price on activity timing	
Adding new price	
Window for adding a new price	
Subdivision of prices on customer and other windows	
Prices in LawTime main window	
Price settings	
Administration	39
Employees	39
Adding a new employee and viewing data	39
Employee data	39
Employee levels	40
Adding a new employee level and viewing data	40
Employee level data	40
Privileges	41
Privileges on two levels	41
Various privileges	
Colours of privileges	
Divisions	
Adding new division and viewing data	
Activity type	
Adding new activity type and viewing data	

Activity type data	
Currencies	
Adding new currency and viewing data	
Currency data	
Options	
Database settings	

Starting LawTime

• LawTime starts automatically when you start your computer. If you have closed LawTime manually, start the program by clicking LawTime icon



LawTime small window

• LawTime small window...



... has two main functions:

- 1. Clock-button starts new timer.
- 2. Leftmost button opens LawTime main window.
- Close (🖾) button hides LawTime window. To display it again, click on LawTime icon



- If you close the program before saving data, the unsaved timers will remain active until you restart the program
- Right click on timer opens a menu



Timing

Starting the timer

• Press the clock-button ...



... and the timing begins ...



Click on timer opens a data entry window and timer stops

Enter the data

New activity		×	
🚽 Save and c	lose 🛃 💁 🖳 🕒 Continue timing		
Employee:	Heidi Hansar 🗸		
Customer:	Van Zoig OÜ 👻		
Case:	LawTime 👻		
Activity type:	Tunnitasu alusel 👻		
Start:	25.05.2009 9:14	1	
End:	25.05.2009 15:55	1	
Duration:	3h 24m 30s (3h 25m) 🗴		
Price:	600 EEK, Zoig		
Total EEK:	2 050,00		
Comments:			
	*	EN	
		2 0	LawTime 🛛
			🔲 🕒
	~		ŽOIG LT 3h 24m 31s •
_		-	< 🖸 🍓 🎙 🖞 16:02

- Enter/select relevant data about customer, case etc
- Do one of the following:
 - select from list
 - start typing in list box for quick search
- If the measured time and actual duration of the work are different, enter the number manually
- Field "Duration" specifies billable time. Gray area shows the duration as it will be shown on invoice (rounding rules applied)
- "End" time is used only to display the duration in calendar, start time and duration will be used for billing
- To calculate "Duration", based on start and end time, press Σ button
- Enter the duration as "1h 30m". You can also use "1.5h" or "90m"
- Price is automatically chosen according to selected employee, customer etc

- Total is calculated automatically
- Comments are displayed on invoice specification
- Use comment templates to simplify data entry. List of comment templates come from settings (Settings -> Comment templates) and from comments used before
- Click on store to view comments entered for this customer or case. To select a comment: 1) doubleclick on the row, 2) select a row and click "paste comment" or "paste date and comment" or 3) select a row and press "enter". On invoice, comments with the same data will be added together as one row
- Set the language in customer or case settings to see the icon [EN] (English) near comment field
- When done, click Save and close
- To hide the window, click on 🖾 button
- To pause and/or continue timing click on ^Q button

More possibilities

• You can use more than one timer at the same time. This helps you to solve easily the situation when you're in the middle of longlasting work, but one or several short-term works are done at the same time.

Activating new timer will pause the others



• Vertical layout displays timers in a vertical view, showing also customer and case information (if data entered before) and pause-button

LawTime	×
•	
Q ZOIGLT	1h 01m 33s 🔹
Ō 15:36	0m 03s 🔸

- Button ... next to a selection area opens a menu with *show all, open, new* and *refresh* options
- Button 🛄 next to selection area opens a calendar to select the time and date
- Click on timer to hide the data entry window (timer will remain paused)
- To pause or/and continue timing, do one of the following:
 - 1. Press on arrow next to timer, click *pause*. Do the same to exit pause.



- 2. Click and hold the left mouse-button on timer to start or exit pause.
- 3. To pause the timer, click on 🙆 and to continue timing click on 🍳.

LawTime	×
•	
Ö ZOIG LT	1h 28m 48s 🔹

• Press "Save and new" to save work and leave data entry window open



Use this option with the same data for example:

- 1. If in addition to hourly rate, international phonecall is billed.
- 2. If same work was done by several employees.

Main window



Press left-button to open main window.

The structure of main window

-	1				1000	1000			-
Activitie	es	A	Cti	vities					
View		Tur	initas	su alusel, Heidi Hansar	, 1.08.2008 - 1	1.08.2008			
C Tegev	/used	0)ate						
Z Field	s		I D)ate	Customer	Case	Comments	Duration	Total EE
ilter:			8	Date : 4.08.2008 -	4 row(s)			D of direct	
mplouee:	Heidi Hans	•		4.08.2008 9:46	Zoig	juhend	inglisekeelne	52m	390,0
inployee.				4.08.2008 10:41	Zoig	juhend	lik	2h 14m	1 005,0
Sustomer:	(all) 🗸 🗸			4.08.2008 13:17	Zoig	juhend	ik	2h 00m	900,0
	[a]			4.08.2008 15:39	Zoig	juhend	ik	31m	232,5
Jase.				5	1			5h 37m	2 527,5
Act. type::	Tunnitasu alusel 🛛 🗸		8	Date : 5.08.2008 -	3 row(s)				
nuuuu	-			5.08.2008 9:37	Zoig	juhend	ik	3h 52m	1 740,0
-enou.		× .		5.08.2008 14:44	Zoig	juhend	ik.	1h 00m	450,0
Start:	1.08.2008			5.08.2008 16:10	Zoig	juhend	il second	15m	112,5
	11.00.0000		_					5h 07m	2 302,5
End	11.00.2000	-	•	Date : 6.08.2008 -	1 row(s)	in the second	1	50	105.0
Auto	Filter			5.08.2008 13:58	Zoig	juhend	LK.	58m	435,0
		-11-	-	Date : 0.00.2000	2 courfed	<u>t</u>		380	433,0
			1	8 08 2008 9 38	Zoig	iuhend	indice	4h 13m	1 897 5
		-15		8 08 2008 15:20	Zoig	iuhend	ik	41m	307.5
Activi	ities			0.00.2000 10.20	Long	Interio	k Dy	4b 54m	2 205 0
Cial Court	1000		- C.	1	1.5			11 511	2 200,0

3 zones of main window:

- **1.** Table selection. Click to select a module.
- 2. Viewing options. Table settings, filters etc.
- 3. Content. Table content.

Work with tables

You can change the look of tables by:

- Sorting
 - Click on column heading to sort the table. Click again on same field to reverse sort direction.
- Grouping

The header of the table shows groups used. Drag a column header there to group by that column and display subtotals.

• You can group by more than one field.

7 8	Active	Customer	Contact	Customer manager	Phone	Address	Comments
		00 Van Zoig	Karu	Heidi Hansar			
		Tartu Ülikool		Heidi Hansar			8
		Võru linn		Heidi Hansar			8

• Autofilter

Arrow-button in column header opens an autofilter menu. Click on a value to filter table data.



Date column allows you to select year, months and day.

A J Sort ascending
Z Sort descending
Tide column
Allow multiple choices
(AII)
Last month
From beginning of last month
This month
Last week
This week
Yesterday
Today Today
Range
Start : 1.02.2009
End : 25.05.2009
2009

• Choose colums to show in the table Click on *Fields* ...



... choose colums to be shown in the table:



• Save the table settings

To save the table, click on *View > Table settings > Save as new*.

	Table settings	Fields	k we	ek 🚺 week	31 m	onth Table
	One day	Save as	new			
	Work week	Ander Ojandu				
	Week	Date				
	Month	- dic			_	
	Tabla	≣ Date	1	Customer	ŤC	Case
Ľ		🖃 Date :	3.04.2008 - 1	row(s)		
*	Refresh F5	• 3.04.	2008 10:23	Tuuleenergia	0Ü T	asuvusanalüüsi lä

Later, you can restore view settings by one click:



• Output table data

You can print, save in a file, send to mail recepient as PDF, copy to Excel etc.

See also

- LawTime main window on page 9
- Activities on page 13
- Customers on page 19
- Cases on page 23
- Invoices on page 26
- Prices on page 32

Activities - viewing measured work

Viewing options

Calendar

Use calendar-look to get an overview of workday, week or month.

Today 1 day 5 wo	ork week 🧾	week 31 mont	h 🏢 Table 🔍 🕶	
C LawTime File Edit View Tools Help	oday 1 day 5 wo	ork week 7 week 31 month	∭Table Q • ≉ Refresh	
Activities View Filter: Employee: Heidi Hansar ♥, Customer: (all) ♥, Case: (all) ♥, Act. type:: [all] ♥, Auto Filter Image: 1 model 1 model Image: 28 29 30 31 model 2 model Image: 28 20 30 31 model 2 model Image: 28 4 model 2 model Image: 28 4 model 3	Activities Tunnitasu aluset. Heidi H 9 00 10 00 111 00 12 00	lansar, 25.08.2008	25 08 2008 9h 25m 9:10 3h 20m Zoig juhend i.k	
Activities Customers Customers Cuses Payroll Administration Administration	13 °° 	:04m nd	14:49 46m TÜ Biomediksini tuumiklaborid	

You can use filters to display the data you need, or select dates from calendar.

Table

Use the table-look to get an overview of measured work.

You can choose filters (from left-menu of the main window) to display the data.

C Law Tin	ne						
File Edit	View Tools Help						
New -		Today	1 day 5 work we	ek 7 we	eek 310 month	efresh	
Canada far							
Search for	customer or case	ø		_			
Activitie	S	Acti	ivities				
View		Tunnita	su alusel, Heidi Hansar, i	25.08.2008			
📝 Fields	L.	Date	•				
Filter:		E (Date	Custome	r [*] Case	Comments	
Employee:	Heidi Hansar 🗸		Date : 25.08.2008 -	4 row(s)			
Curbonian	(sm)		25.08.2008 8:00	TU	projekt "tugevad magnetväljad"	2	
Customer.	(aii)	-	25.08.2008 9:10	Zoig	juhend	I.K.	
Case:	(all) 💉	-	25.08.2008 14:49	TO	Biomeditsiini tuumiklaborid		
Act. type::	(all) 🗸	-	20.00.2000 14.40	10			
					68	38.	
Period:	Yesterday 💉						
Start:	25.08.2008						
End:	25.08.2008						
Auto	[Film						
19-19-19-19-19-19-19-19-19-19-19-19-19-1	Filler						
Activit	ies						
S Custor	ners						
Carer							
Invoic	62						
Payrol	E						
				9	113		
Admini	istration	-					×
& Heidi Ha	nsar Van Zoig D()		400			NUM INS	CAPS

You can also:

- print the table, save in a file, send to mail recepient as PDF, copy to Excel etc
- show and hide the table fields
- sort
- group in different levels (subtotals)
- save table settings to display them later
- use filters (similar to Excel AutoFilter)

Filtering activities

View Fields	l		
Filter:			
Employee:	Heidi Hansar	~	
Customer:	(all)	~	
Case:	(all)	~	
Act. type::	(all)	~]
Period:	Yesterday		~
Start:	25.08.2008		
End:	25.08.2008		
🔁 Auto	[Filter	

Use the *filter* to view activities which correspond to selected criteria.

For example, if you select a *customer*, then you will see activities only for this customer. But if on *customer* field *all* is selected, then you will see activities of all customers.

Use *Period* list to select from most frequently used time ranges.

Click *Filter* to apply your selections.

Use autofilters for a quick filtration.

Allow multiple choices help you to select different objects (e.g. in customer's or other column) at a time.



Date	column	allows	you	to	select	year,	month	and	day:
Date	 Custom 	er Case Com	ments						
<mark>∱</mark> ↓Sort a	ascending								
Z ↓ Sort o	descending								
🔠 Hide (column								
Allow	multiple choic	es							
(AII)									
🗌 🗌 Last n	nonth								
From	beginning of la	ist month							
🗌 This r	nonth								
Last v	veek								
This v	veek								
Yeste	rday								
Today	,								
Range	э								
2009									

Flag the activities ready to bill

"Flag" column in activities table is to: 1) mark activities ready for billing and 2) view the status of the bill.



According to privileges a user can flag: 1) his/her own activities, 2) activities, where the user is a manager of the customer or the case, 3) all the activities.

Use a column in the main window to flag the activities:

To flag the activity ready to bill, click on "clear flag" \checkmark . The colour of the flag turns green \checkmark , which means that the activity is flagged "ready to bill". Doubleclick marks the activity "not to bill" - \times . To unmark the activity, click one more time on the flag - the flag is "empty" again.

To select a group of activities "ready to bill", click on the group header row:



Right click on selected rows opens a menu with options:

٣	Ready to bill	
×	Do not bill	
4	Clear Flag	
	Сору	•
# 8	Find	
4	Print	
P	Send to	•
2	Choose fields	

Create a view

To view or edit flagged activities, use the main window *Activities* section. To view activities with different billing statuses, create a view. For example: ""*Bill needed*" and "*Bill empty*".

The view "*Bill needed*" shows all the activities which are flagged "ready to bill". This view gives you a quick overview of the customers and activities to bill.

To create this view use filter (date, customer, case, comments) in the main window and sort the column named "Bill status", checking "Bill needed".

The view "*Bill empty*" shows all activities which are waiting to be flagged for billing. To create this view, use filter (date, customer, case, comments) in the main window and filter the column named "Bill status", checking "Empty".

🕒 LawTime	2		N		١.	
File Edit	View	Тос	ols	Hel	р	
📺 New 🗸	3	۵.	Ж	þ	Ê	, T
Activitie	s					
View			_			
C Bill nee	ded					
C Bill to d	olo					
Heidi's	this mo	onth				
📝 Fields						
Filter:						
Employee:	Heidi	Hans	ar		•	
Customer:	(all)				•	
Case:	(all)				•	
Act. type::	(all)				•	
Period:	This n	nonti	h			•
Start:	1.05.2	009			ļ	
End:	31.05	2009			ļ	
📃 Auto				Filt	er	

Bill status

- The activity is not flagged
- * The activity is flagged "ready to bill"
- X Do not bill the activity
- 🧏 The bill is being composed, but is unconfirmed
- The bill is composed, confirmed, but not received yet
- The bill is composed, confirmed, and received
- 4 The bill is overdue

Customers

Adding customers and viewing data

To find the customer data, do one of the following:

- 1. Subdivison "Customers" in main window. Click "New" to create new customer.

Customer data

General

File Edit Help					
🖵 Save and close		2	+ 🔶 + 🔺	м 🕜	
General Details	Cases Prices	Invoices	Documents		
Name:]	Address:	~
Short name:	-				
Reg code:					
VAT code:					~
Phone:				E-mail:	
Fax:				www:	
Contact person:					Active
Manager:	Heidi Hansar		~		Export customer
Division:			~	Mail settings:	Newsletters
Contract date:					Christmas cards
Contract number:					Invoices by E-mail
Comments:					No paper invoices

Name – the name of the customer.

Short name - is displayed e.g. in LawTime main window to view activities.

VAT code – VAT code used for this customer.

Division – select a division for this customer.

Contract date - the date, when contract was signed.

Contact number – customer's contact number.

Comments – add comments about this customer.

Address – customer's address.

Active – when "active" is checked, the customer will be shown in selection lists.

Export customer – tick the checkbox to mark customer as *export customer*.

Mail settings – tick the checkbox (Newsletters; Christmas cards; Invoices by E-mail; No paper invoices) you need to consider when composing e-mail to this particular customer.

Details

SE New Customer			
File Edit Help			
🚽 Save and close 🛛	🗄 🔏 🛍 📇 🌢	• • • • AFA 🕡	
General Details Cas	es Prices Invoices	Documents	
Default activity type:	(use default)	Customer ID:	
Language:	(use default)	Postal address:	
Currency:	(use default)	~	
Invoice due days:			
VAT calculation:	(use default)	~	
Invoice layout:	(use default)	~	
Invoice letterhead:	(use default)	v	

Details tab specifies data for this customer:

Default activity type specifies activity type used in new activities for this customer.

Language is default language for this customer. Language icon **EN** is shown in the right corner of comment field. Enter comment template texts according to language settings (see also on page 46).

Currency is default currency, used on invoices for this customer.

Invoice due days goes automatically on invoice, after entering the *invoice date*.

VAT calculation – VAT % used on invoices for this customer.

Invoice layout – determines how invoice parts are organized on paper.

Invoice letterhead – controls invoice headers and footers: bank details, addresses, contact information, your company logo etc.

Customer ID – customer ID in external system (e.g. accountancy).

Postal address - enter customer's *postal address* if it's different from customers *address*. It displays automatically on invoice, after the customer is selected.

Cases

E New Custom	er	
File Edit Help		
🚽 Save and close	- 🛃 👗 🗈 📇 🔺 • 🔹 •	AMA 🔞
General Details	Cases Prices Invoices Docume	ints
* New 💕 🖓	en 🔲 Case required for activities	
Drag a column h	eader here to group by that column.	
E Case Oppor	nent" Active" Comments	Employee Short name Contact
• 0	0	

List of customer's *cases* (see also on page 23). Click on "New" to add a new case to the customer. To open case, click "Open" or doubleclick on case row.

If "*case required for activities*" is checked, then case must always be selected when entering new activities for this customer.

New Custome	r			
ile Edit Help				
Save and close	H	۵ <u>8</u>	🔶 🔹 🐡 👻 ARA	0
eneral Details (Cases Pric	es Invoi	ces Documents	
Activity type: Tur	nnitasu aluso Deint	el Moolu	v	
Activity type: Tur New., 🚰 Oper Drag a column hea	nnitasu aluse n <u></u> Print der here to	el 💽 Only group by t	active	
Activity type: Tur New., 🚰 Oper Drag a column hea E Name	nnitasu aluse n () Print der here to Price	el I Only group by t Currency	active	
Activity type: Tur New., 2000 Drag a column hea Name partner Loeneral price	nitasu alusi n Aprint der here to Price 600,00	el Only group by t Currency EEK EEK	active that column. Comments	

List of customer's prices (see also on page 32).

Invoices

📧 New Customer	
File Edit Help	
🛃 Save and close 🛛 🔏 🗈 😤 🔺 🔹 🛪 🗛	0
General Details Cases Prices Invoices Documents	
New., 💕 Open	
Drag a column header here to group by that column.	
E Confirmed Date Due date Invoice no Amount EEK	VAT EEK T
▶ 0 0 0,00	0,00
	>

List of customer's invoices (see also on page 26).

Documents



List of customer's documents from SharePoint website.

Case

Adding case and viewing data

To open case data, do one of the following:

- 1. Subdivison "Case" in main window. Click "New" to create new case.
- 3. Click on Customer data window subdivision "cases".

Case data

General

lie buit help		
🚽 Save and close	📑 👗 🗈 📇 🚧 🎯	
General Details	Prices Tasks Invoices Documents	
Case:		
Short name:		
Customer:		×
Contact:		
Employee:	Heidi Hansar	~
Opposing side:		
Division:		~
Contract date:		
Contract number:		
Active	*	
Comments:		

Case – the name of the case (required).

Short name is displayed e.g. in LawTime main window to view activities (otherwise the name may take too much room in table).

Customer connected to this case.

Contact – the name of a company and/or person, who represents the customer.

Employee – name of a person, connected to this case.

Opposing side – opposing side of this case.

Division - subdivisions, used to differentiate customers, cases, employees and invoices.

Contract date – the date, when contract was signed.

Contract number – the number of contract, connected to this case. When composing the invoice, after selecting customer, LawTime offers you a list on contract numbers to select.

Comments – add comments to this case. Comments are shown in main and case window.

Active – when *Active* is checked, the case will be shown in selection lists (e.g. when entering the data).

Details

📁 New case		
File Edit Help		
📕 Save and close 🔓] X 🗈 🔼 AMA 💿	
General Details Pric	es Tasks Invoices Documents	
Default activity type:	(use default 🔽 Customer ID:	
Language:	(use default 👻 🛛 Postal address:	
Currency:	(use default 🐱	
Invoice due days:		
VAT calculation:	(use default 🖌	
Invoice layout:	(use default 👽	
Invoice letterhead:	(use default 🖌	

List of case details:

Default activity type specifies activity type used in new activities for this case.

Language is default language for this case.

Currency is default currency, used on invoices for this case.

Invoice due days goes automatically on invoice, after entering the *invoice date*.

VAT calculation – VAT % used on invoices for this case.

Invoice layout – determines how invoice parts are organized on paper.

Invoice letterhead – controls invoice headers and footers: bank details, addresses, contact information, your company logo etc.

Customer ID – customer ID in external system (e.g. accountancy).

Postal address - enter customer's postal address to display it automatically on invoice, after the customer is selected.

Prices List of case's prices.

Tasks List of case's tasks.

Invoices List of case's invoices.

Documents

List of case's documents from SharePoint website.

Invoices

Adding and viewing invoice data

To open invoice data, do one of the following:

- 1. Subdivison "Invoices" in main window. Click "New" to create new invoice.
- 2. Click on Customer data window subdivision "invoices".
- 3. Click on Case data window subdivision "invoices".

Invoice window

🎝 Invoice No	1					
File Edit Invo	ice settings Help					
🚽 Save 🛃 🤅	🛃 🙇 🛃 🔂 Send e-mail 🔹 👗 🗈 🙈 A	M 🕜				
Invoice Specifi	ation Payments Comments Payroll					
Customer	Van Zoig OÜ	~	Confirmed	>		
Case		~	Invoice No	1		*
Postal address	Rija mnt 181a	~	Date	10.11.2	2008	
	Tartu	~	Due date	17.11.2	2008	
Currency	EEK 💙		Contract	ghhg		~
VAT calculation	Automatic	•	Issued by	Heidi Ha	ansar	¥
	L		Division:	LawTim	e	×
⇒ E Add row ▼	∃+Delete row 🖻 🖬					
I Hidden Sp	ecification	Quar	ntity	Price	VAT %	Total
lot 🔲	os according to agreement		1 3	000,00	18	30 000,00
He	idi Hansar	5h	16m	500,00	18	2 633,33
1		T-6			- 100/ -	20,000,00
		TUC	ai taxable at	VAT TOU	E 10%. T 18%:	5 400 00
100				Amou	INT EEK:	35 400,00
						~
						~

- Customer, who receives the invoice
- Case
- **Postal address** is filled automatically when customer (or case) is selected. You can also enter the address manually
- **Currency**. Select the currency before you add billed work on your invoice. In that case, if necessary, LawTime converts prices into new currency
- VAT calculation: "all 18%", "all 0%" või "services 0%, expenses 18%". If you choose the last, VAT % will be added according to activity type (service/expense) you entered. Use -button to enter different tax rate
- **Confirmed**: you see "DRAFT" on unconfirmed invoice. You can change data until the invoice is not confirmed. After the invoice is confirmed you can not edit it and you will no longer see the sign "DRAFT"
- Invoice No: after you select the date, invoice numbers appear (according to your settings) automatically from number series or you can add it manually
- Date: enter the date or select it from the calendar
- **Due date:** enter "due date" or click ... button to select number of due days

- **Contract** enables you to select or enter the contract number. Data in popup menu comes from *customer* or *case* data
- Issued by: person's name, whose signature will be used on invoice
- Division subdivisions, used to differentiate customers, cases, employees and invoices
- Invoice settings "invoice type" defines your invoice as "SIMPLE", "credit" or "pro forma"

Rows

4 types of rows are used on invoice (upper left-corner of the table "Add row"):

- 1. "From saved activities" data from measured or entered activities.
- 2. "New activity" open a data entry window. A new row with the new activity will be added on invoice.
- 3. "Text row" simple text and/or manually entered sum.
- 4. "Extra text under invoice" add more information. This row is seen in the bottom of invoice, under *tax* and *total sum* rows.



"Hidden" means that the row is hidden from printout, specification and from sum calculation field:



For example: use hidden rows if you have a fixed job payment and you have measured your work in LawTime. This enables you to add billed work on invoice, but the customer sees the sum according to your agreement.

Adding billed work to invoice

Click "Add row" button:



... and the pop-up menu opens with options:



Adding work:

From saved activities

1. Click on "From saved activities" opens a wizard. On the first page of the wizard you can select parameters to search for activities.

🕒 Add activities			
Select activit	ies to include on the invo	ice.	
Select parameters I	o search for activities.		
Customer	(all)	~	
Case	(all)	~	
Employee	(all)	~	
Activity type	(all)	~	
Quick select		*	
Date range	until		
Comments			
Reset prices		9431 25 25 26	
Resets all prices	selected on timing and uses currently a	ictive prices for all a	activities.
Cancel	<< Previous	Next >>	Finish

Quick select offers a selection of defined periods:

Quick select	last month	~
Date range Comments	last month from beginning of last month this month last week this week yesterday today	

Date range enables you to choose year/month/day, i.e select a period you need information about.

Tick in *"Reset prices"* cancelles all prices selected on timing and uses currently active prices for all activities.

Click "Next" to continue.

 Select fields according to which separate rows will be created on invoice. Seperate rows will always be used for different activity types and prices. Example: Select "Case" to place activities for different cases on separate invoice rows. Leave "Case" empty to group activities for all cases to one row.

• Add activities	
Invoice row separation	
Select fields according to which separate rows will be created on in	ivoice.
Example: Select "Case" to place activities for different cases on se rows. Leave "Case" empty to group activities for all cases to one r	parate invoice ow.
Case	
Employee	
Employee level	
Activity type	
Price	
Separate rows will always be created for activities with different a prices.	ctivity types and
Cancel << Previous Next >>	Finish

Click "Next" to continue.

3. Invoice preview. You can unselect rows to be excluded and edit parameters before adding to invoice.

C) A d	d activit	ies					×
P	rev	iew						
V. in	erify voice	activities to) be placed on invoice. You can ι	inselect rows to be excluded and edit para	meters before addir	ng to		
		Selected	Description	Price	Quantity	Price	Total	1
•	<u>ن</u>		Partner	Zoig HH	1580h 24m	450,00	711 180,00	
	١.		Partner	Partner	5h 16m	600,00	3 160,00	
~							714 340,00	2
(Cancel]	< Previou	s Next >	> (Finish	

When done, click "Finish".

Text row

Click "Text row" to fill the invoice manually.

🔚 Add ro	w🕶 🔚 Lisa reale - 🚵 Delete row 🚵 🙀				
E Hidden	Specification	Quantity	Price	VAT %	Total
	Jobs according to agreement				
	Type the text manually	1	4 500,00	18	4 500,00

Add additional bottom text to invoice in "**Extra text under invoice**" area. You can set a default text row for new invoices (see also on page 46).

Invoice delivery

To deliver invoice, do one of the following:

1. Print – click on print-button after entering data ...



... opens a "Invoice print options" window.

Main invoi Main invoi	ce page	
Specificat	ion	
Options		
Language	Estonian	*
Layout		~
Letterhead	(blank page)	*
Note "Rep	eated"	
Note "Rep	eated"	

Choose invoice parts to print, and visual look of your invoice.

Layout determines how different invoice parts are organized on paper.

Letterhead controls invoice headers and footers: bank details, addresses, contact information, your company logo etc. Letterheads can be edited under LawTime settings (see also on page 46). Modifying invoice layout requires technical skills and tools, and cannot be done directly from LawTime. Contact LawTime distributor to make changes to invoice layouts.

By default, letterhead and layout come from *Customer* (Customer window > Details) or *language* (Tools > Options > Invoice printing) data.

Click "OK" to open print preview.

2. Save as PDF



... opens a "Invoice print options" window.

Select options, and click "OK". Choose a place to save the file.

3. Send to mail recepient as PDF or HTML – after entering data, click on Send to.



4. **Send e-mail** – LawTime opens your default e-mail client (e.g. Outlook) and starts composing new mail, PDF file attached to it.



Make the changes you need and click "Send".

To compose an e-mail with customer's address already on it, click on the arrow of "Send e-mail" button Send e-mail Click on address opens your default e-mail client and starts composing new e-mail with "To"-address filled.

🔂 Send e-mail 🔹	*		2	AM
OÜ Van Zoig (info(Dzoig	.ee)	
				72

"None" means there's no e-mail address entered on customer's data sheet.

Invoice commands

Shortcuts on "Invoices" main window:

۰L	awTi	me		
File	Edit	View	Tools	Help
	New •	-18		K Ca
Inv	oice	s		
Invo	ice c	ommar	nds	
	New	invoice	B	
Q	Сору	, invoic	е	
t)	New	credit i	nvoice	
	Mak	e credit	invoice.	«
2	New	pro for	ma invoi	ce
	Impo	ort paym	ients	
	Ехро	ort invoi	ces	

To fasten your invoice making process, select a client in main the table and click on "Invoice command" shortcut you need.

Payroll

Payroll enables to divide the sum of an invoice according to measured activity times, purchased services or/and account managers etc enabling clear and precise overview of employee turnover.

Every user has an access to view or edit payrolls according to user privileges: 1) view personal payrolls, 2) view other people's payrolls or 3) edit payrolls.

To use Payroll, open the invoice and click on the tab:

) Invoice No 20	0905005	1				l	
File Edit Invoi	ce settings Help	/					
🕞 Save 🛃 🎒	🛕 🛃 🎰 Send e-mail 🗸 🛔 📬 💕	AFA 🕜					
Invoice Specific	ation Payments Comments Payroll						EN
Customer	Van Zoig OÜ	▾ .	- Co	nfirmed			
Case	LawTime	. ▼	Inv	oice No	2009050	05	•
Postal address	Riia mnt 181a		Da	te	27.05.20	09	
	Tartu	-	- Du	ie date			
Currency	EEK		Co	ntract			•
VAT calculation	Automatic	•	. Iss	ued by	Heidi Ha	nsar	•
			Div	vision:	LawTime		•
Add row-	🖩 Lisa reale+ 🍋 Delete row, 🚵 📟						
I Hidden Spe	cification		Quantity		Price	VAT %	Total
Jobs	according to agreement						
Law	Time		1		4 500,00	18	4 500,00
			Total ta	xable at	: VAT rate	• 18% :	4 500,00
					VAT	18%:	810,00
					Amour	nt EEK:	5 310,00
							*
							Ŧ

IJ	Ir	nvoice No	2009	905005	-	1 × 1						• X
F	File Edit Invoice settings Help											
6		Save 🔡	3	🔔 🛃 🔂 S	iend e-mail	- 👗 🗈 📇 -	ARA 🕜					
I	nvo	oice Spec	ficat	ion Paymen	ts Comme	ents Payroll						EN
	2	Add row	- 5	Add employ	ees 🗸 🗙	3						
1E		Confirm	ed `	Payroll date	Employee	Comments	Duration	Invoice sum	% or row	% of invoice	Total	%
		🗆 Remain	der									
	Þ					Jaotamata					4 500,00	100,00%
							0m	0,00		0,00%	4 500,00	100,00%
Ш												
							0m	0,00		0,00%	4 500,00	100,00%

• Click on "Add row" opens a pop-up menu with options "Invoice expenses" and "Other expenses":

Invoice	ce Specification Pa		aymen	ts	Comme	ents	Payroll
Ad	d row 🗕 🚮	Add e	mploy	ees	- X	4	2
[I	nvoice expe	nses	date	Em	ployee	Com	ments
	Other expen	ses					
-						Jaot	amata

- Add a row "*Invoice expenses*" to attach direct costs of the invoice to the payroll. These are the activities wich *activity type* (see also on page 44) is set as *expense*.
- Add a row "Other expenses" to add expenses manually
- Click on "Add employees" opens a pop-up menu with options "Worked on this invoice" and "Customer Manager":



- To delete a row, mark rows and press 🗙 button
- Click 鑉 button to print the table
- Click 🗐 button to save the table to Excel

The structure of the table

The rows of the table

At first there is one row header in the table – "Remainder":

) Invoice			-				-		
File Edit Invoic	e settings H	lelp							
🕞 Save 🛃 🎒	🔔 🛃 🔂 S	iend e-mail	- 🔏 🗈	A#A 📇	0				
Invoice Specifica	tion Paymen	ts Comm	ents Payrol	I					
🎦 Add row 🗸 🔮	Add employ	ees 🗸 🗙	3						
Confirmed	Payroll date	Employee	Comments	Duration	Invoice sum	% of row	% of invoice	Total	%
Remainder									
			Remainder					10 500,00	100,00%
				0m	0,00		0,00%	10 500,00	100,00%
				0m	0,00		0,00%	10 500,00	100,00%

You can add two more – "Expenses" and/or "Payrolls":

) Invoice					-				
File Edit Invoice settings Help									
📕 Save 📓 🎒 🛕 🗞 🕯 S	end e-mail +	🖌 🖻 🕻	🛓 🗚 🌀)					
Invoice Specification Paymen	Invoice Specification Payments Comments Payroll								
👏 Add row 🗸 🕵 🕺 Add employ	ees + 🗙 📑	1							
Confirmed Payroll date	Employee	Comments	Duration	Invoice sum	% of row	% of invoice	Total	%	
Expenses		D (1)							
		Profit	0m	0.00		0.00%	0.00	0.00%	
Payrolls			VIII	0,00		0,0076	0,00	0,0070	
	Heidi Hansar								
			0m	0,00		0,00%	0,00	0,00%	
Remainder									
		Remainder					10 500,00	100,00%	
			0m	0,00		0,00%	10 500,00	100,00%	
			0m	0,00		0,00%	10 500,00	100,00%	

The sum of the invoice will be divided on the basis of "*Expenses*" and "*Payrolls*".

"Remainder" shows always the sum, which is left (undivided) from the total sum of the invoice.

The columns of the table

There are ten columns in the table: confirmed, payroll date, employe, comments, duration, invoice sum, % of row, % of invoice, total, %.

) Invoice							-	-		
File Edit	File Edit Invoice settings Help									
🚽 Save	🕞 Save 📑 🎒 💁 🔂 Send e-mail 🖌 👗 🖺 🏙 🗛									
Invoice S	Invoice Specification Payments Comments Payroll									
📍 Add i	row 🗸 🕵	Add employ	ees + 🗙 🤞	3 😫					+	
E Cor	nfirmed 🏅	Payroll date	Employee	Comments	Duration	Invoice sum	% of row	% of invoice	Total	%
🗆 Exp	Expenses									
				Profit						
					0m	0,00		0,00%	0,00	0,00%

Type or add the data of values in columns.

Please note!

There are separate rows for "% of row" and "% of invoice".

Mark the *"payroll date"* manually if it is different from the invoice date.

Payroll settings

To save payroll settings go to Tools > Payroll.

Prices

You can add prices according to activity type, customer, case, employee, employee level or the combination of them. You can also use different currencies.

Price on activity timing

While entering data, LawTime offers most accurate price according to this case. For example, if there is no price to a case, LawTime offers you a price set to a customer. You can also choose an implied price (e.g. even if there is a price set to a customer, you can choose a prise set to bureau).

You can also enter the price manually, i.e. it's not mandatory to choose the price from database.

Adding new price

To add new price, do one of the following:

- 1. Subdivison "Prices" in LawTime main window. Click "New" to add data.
- 3. Click on Customer, Case, Employee data window subdivision "prices".

Window for adding a new price

You can add the following:

- total value
- currency
- parameters of price (used for customers, cases, employees, employee levels)

Make your selections and the "Name"-field will be automatically filled by LawTime.

If necessary, enter the Name manually.

To see the price in all options, matching to these parameters, select "all".

Combine price parameters. For example, you can make different prices, if:

- the customer is "The University of Tartu", type of activity is "strategic planning"
- the customer is "The University of Tartu", employee level is "lecturer"
- employee level is lawyer
- all parameters are marked as "all" (base rates of activity types)

While entering data, LawTime offers a price closest to selected parameters.

You can delete price only if there's no work saved using this price. Untick "Active" will remove the price from selections.

File Edit Hel	p IIII III				لعال	
Gave and d	ose 📓 🗙 Delete 📔	¥ 0	b 🖪 🔺 • 🔹	• AFA 🕖		
General	70IC partner		Customer	Vap Zoig OÜ		1
Activity type:	managing v		Case:	(all)	~	
Currency:	EEK		Employee level:	Partner	~	
Price:	600,0000		Employee:	(all)	~	
Comments:						
						18

Subdivision of prices on customer and other windows

You can see overviews of currently active prices in *customer*, *cases*, *employee*, *employee level* and *activity type* windows.

Prices in the table are sorted in ascending order from specific to general.

General prices are displayed in grey colour. For example, you see *base rates* and *employee level* prices in grey colour, customer and case specific prices are displayed in black.

To see only currently active prices, tick the "Active" checkbox, untick to see all.

Choose "Activity type" you want information about (at first you will see activity type set in Tools > Options > Program settings > default activity type).

🔙 Van Zoig OÜ				
File Edit Help				
🕞 Save and close 🛛 🔓) 🗙 Dele	ete 👗	🔁 📇 AMA 🕡	
General Details Case	s Price:	s Invoice	s Documents	
Activity type: IT			~	
🀴 New 对 Open	🚽 Print	Only a	tive	
Drag a column header	here to g	roup by th	at column.	
🛯 Aktiivne Name	Price	Currency	Comments	
🕨 🗹 partner	550,00	EEK		
💽 📝 assistant	400,00	EEK		

Prices in LawTime main window

Prices in LawTime main window display the table of **all** prices.

We recommend you to use customer, case etc window to view the specific price you're interested in.

To get the best overview of the table, use one of the following:

• Sort, group, filter (see also on page 10)

🕒 LawTime									ĸ
File Edit View Tools Help									
😵 New - 1 🖂 🖪 🛛 🗶 🗈 🙉 1	# Refres	h 📗 Tartu Ülikool	0 9						
Bricas	Price								
Frices	FILE	5			_	_	_		
View	Drag a	column header here to group t	by that column.						
Preius	V I Act	ive Name	Price Cur.	Activity type	Customer	Case Ta	sk Empl. level	Employee	-
Quick selections	_ V	Oldine tunnihind	650,00 EEK	Tunnitasu alusel	00 Van Zoig				
Dase rates	- V	Zoig HH IT	450,00 EEK	IT teenused	OU Van Zoig			Heidi Hansar	1
Selections		∠oig HH	450,00 EEK	l unnitasu alusel	UU Van Zoig		- 10	Heidi Hansar	1
Act. type (all) 🗠		Assistant Nikon partner HH phone	600.00 EEK	nanaging	Nikon		Partner	Heidi Hansa	-
Currency EEK 🔍		I Nikon paimer nn phone	000,00 221	prioriecai	INKON	ll	Fattier		
Customer (sll)									
Lase [all] 🗸									
Empl.level (all) 💽									
Employee (all) 👽									
Active									
Only applied strictly to selection									
Display									
Activities									
S Customers									
Cases									
J mvoices									
Payroll									
C Prices									
Administration	<) (>
💈 Heidi Hansar 🛛 Van Zoig OÜ							NUM	IS CAPS	

• Selection panel on the left-side of the main window. See also below.

Price settings

Selections in the left-side panel of the main window:

- View make a personal view using parameters you need
- Quick selections to return to base rates
- Filters to define prices: activity type, currency, customer, case, employee level, employee
- Active price:

Tick the "Active" checkbox (☑) to view only currently active prices.

Untick the "Active" checkbox () to view only currently inactive prices.

Mark the "Active" checkbox grey to view all prices.

Field:	s	
Quick sele	ections	
Base	rates	
Selections	patronesta	
Act. type	(all)	*
Currency	EEK	~
Customer	(all)	~
Case	(all)	~
Empl.level	(all)	~
Employee	(all)	~
Active		
🛃 Only app	lied strictly to s	election
	ſ	Displau

- "Only applied strictly to selection" checkbox helps you to specify filter selections:
 - Only applied strictly to selection general prices
 to view prices of specific customer/case/etc and also
 - 2) Only applied strictly to selection to view prices only of specific customer/case etc
- "Display" shows the table according to selections

Administration



Employees

Adding a new employee and viewing data

To add/open employee data, do one of the following:

- 1. LawTime main window, subdivision "Administration" > "Employees". Click "New" to add new employee. Click on employee name to open data.
- 2. To add/open employee data , click on ... -button in any place LawTime offers a choice "*employee*".

Employee data

• General

General data of employee, user name, employee level etc. Tick in "Active" checkbox shows employee in selections.

💈 Heidi Hansa	ar 📃 🗖 🔀						
File Edit Help							
📕 Save and clos	e 🛃 👗 🗈 🏝 🔺 🕶 🕶 🗛 🥥						
General Details	Privileges Prices						
First name:	Heidi						
Last name:	Hansar						
Short name:	HH						
User name:	IndrekKaru\Heidi Hansar 🛛 🗸						
Employee level:	assistant 💌						
Division:	IT						
	Active (will be displayed in selections)						
Comments:							

By default, table shows only active employees. To see all employees, click on column "Active" and then tick the checkbox "All".

• Privileges

Specific privileges of employee.

Privileges set on employee window are superior to employee level privileges.

• Prices

List of prices attached to employee.

See also

- Employee levels on page 39
- User privileges on page 41
- Prices on page 32

Employee levels

Adding a new employee level and viewing data

Employee level represents a group or role of employees (e.g. attorney at law, accountant).

To open employee level data, do one of the following:

- LawTime main window, subdivision "Administration" -> "Employee levels". Click "New" to add new employee level. Click on employee level name to open data.
- 2. To add/open employee level data , click on ... -button in any place LawTime offers a choice "*employee level*".

Employee level data

General

Name, short name, comments.

🕵 Partner		
File Edit H	elp	
📕 Save and	close 📑 🕺 🗈 🏝 🔺 🔻 🔻 🔺 AMA 🞯	
General Priv	vileges Prices	
Name:	Partner	
Short name:	partner	
Comments:		
		~
		9
2		

• Privileges

Employee level oriented privileges.

These are default privileges for entire group of this employee level. Define specific privileges in employee window.

• Prices

List of prices attached to employee levels.

See also

- Employees on page 39
- Prices on page 32

• See user privileges below

Privileges

Privileges on two levels

Privileges are either allowed or denied, employee cannot enter or change privileges.

User privileges are set on two levels:

• *Employee level* oriented privileges. These are default privileges for entire group of this employee level.

E.g. employee level *Partner* is allowed to view and edit other user's activities.

Activities

View other user's activities

🗹 Edit other user's activities

Specific privileges of employee.
 E.g. employee level *Partner* is allowed to view and edit other user's activities, but you can untick the checkbox (in privilege window) and this particular Partner does not have this privilege anymore.

Activities

View other user's activities

Edit other user's activities

Various privileges

List of all user privileges.

-	Log in to LawTime program
	Activities
1000	✓ View other user's activities
	🔄 🗹 Edit other user's activities
÷	Customers
	Add
	Edit
÷	Cases
	Edit
-	Invoices
	- 🗹 Yiew
	🔲 Edit
	🛄 Confirm
	🛄 🔲 Remove confirmation
-	Prices
	🛄 View
	Edit
-	Payroll
	🚽 🗹 View personal payrolls
	🚽 📃 View other people's payrolls
	📃 🔲 Edit payrolls
-	Analysis
	View
	Administration
	- 🔲 View
	- Edit employees
	- 🔄 Edit employee privileges
	- Edit usernames
	🗌 🔲 Edit employee levels
	🚽 🔲 Edit employee level privileges
	- 🔄 Edit divisions
	🚽 🗹 Edit activity types
	- Edit currencies
	🛄 Edit company-wide settings

Colours of privileges

LawTime uses different colours for different privilege levels to simplify administration and give the best overview.

• Privileges, allowed on currently open unit (employee level or particular employee), are displayed in regular font style.

Edit other user's activities

• Privileges, allowed to particular *employee level*, are displayed in grey colour. These are inherited privileges.

View other user's activities

• Privileges, changed after last saving, are displayed in **bold black**.

View other user's activities

• Privileges, changed from inherited to different and then back to inherited, are displayed in bold grey colour.

View other user's activities

See also

- Employees on page 39
- Employee levels on page 40

Divisions

Divisions - subdivisions, used to differentiate customers, cases, employees and invoices.

Title "division" is changeable (e.g. department, area, team, subject field etc).

To activate "divisions" go *Tools > Options > Divisions > tick in checkbox*. You can also change the title here.

my secongs	Program setting	is Tab	le printing	Invoice	settings
Invoice texts	Invoice printing	Divisions	Comment t	emplates	Payrol
Use division	IS				
Language:	English	~			
Singular:	Division				
Plural:	Divisions				
Short name:	Division				

You can see *divisions* in customer, case etc selections after activating it. Add *divisions* in LawTime main window table by clicking Fields.

Adding new division and viewing data

To add/open division data, do one of the following:

- 1. LawTime main window, subdivision "Administration" > "divisions". Click "New" to add new division. Click on division name to open data.
- 2. To add/open division data , click on \cdots -button in any place LawTime offers a choice "division".

Activity type

Adding new activity type and viewing data

Activity type is used to describe different jobs (wages, phonecall etc).

To add/open activity type data, do one of the following:

- LawTime main window, subdivision "Administration" > "activity types". Click "New" to add new activity type. Click on activity type name to open data.
- 2. To add/open activity type data , click on \cdots -button in any place LawTime offers a choice "activity type".

Activity type data



• General

Name, short name, measurement, unit, comments, rounding on timing, rounding on invoices.

- Accounting Type (service, expense, others), VAT, other parameters.
- Prices List of prices attached to activity type.

Currencies

Adding new currency and viewing data

To add/open currency data, do one of the following:

- LawTime main window, subdivision "Administration" -> "currencies". Click "New" to add new currency. Click on currency name to open data.

Currency data

• General

Code, name, current rate, comments. Name the base currency and fix the rate to 1.

New currency	
File Edit Help	
🛃 Save and close 🛛 🖁 🔏 🗈 📸 🗚 🥥	
General	
Code:	
Name:	
Base currency	
Current rate:	
Comments:	
	~

Options

To open settings click "Tools" > "Options".

VIEW 1	oois Heip				
18	Options.				
strati	Databas	e settings			
surau	User.,				
🕒 Setti	ings	_	-		×
Tal	ble printing	Invoice	settings	Invoice la	nguages
Invo	Invoice printing Divisions Comment templates Page			Payroll	
	My settin	gs	P	rogram setting:	s
User	interface lang	juage			
Lang	guage: Englis	h	-		
Time	r functions				
	lse vertical too	l window layout	+		
v	Vhen checked	timer buttons v	vill be arrange	ed vertically. Als	o, short
a b	ctivity descript	tion and pause l	button will be	displayed next	to timer
🗸 🗸	uto hide tool	window			
H	lides LawTime	s tool window a	and open activ	vity windows	
a 🛛 🗤	iutomatically ii Ice cmall data	n 3 seconds whe	en another ap	plication is use	d
)nen data enti	window on tir	mer start		
	Timer initial	y stopped	lier start		
	sk for confirm	ation on progra	m evit when t	here are unsave	ed timers
	Vhan clasing a	mall window m		netification or	
	vnen closing s	mail window me	ove to taskbar	notification ar	ea
Mair	n window				
On o	opening wind	ow go to: Acti	vities	•	
Defa	ault view for a	tivities Tab	le		•
				ОК	Cancel

Fields you see on Settings window come from employee (level?) privileges.

Regular user view in *My Settings*:

- My Settings:
 - 1) User interface language
 - 2) Timer functions
 - 3) Main window display
- Program settings:
 - 1) SQL based user authentication
 - 2) Allow password saving
 - 3) Enable tasks
 - 4) Allow price on activity timing

- 5) Default currency
- 6) Default activity type
- 7) Error reporting program error condition is created to test error reporting. WARNING: do not click "Close program" on error window because LawTime will then be closed and unsaved changes will be lost
- **Table printing** margins (mm), styles (editable)
- Invoice settings:
 - 1) Invoice numbers (can be edited; take automatically from number series). Choose if the invoice number must be filled on printing, saving or confirming.
 - 2) Invoice calculations duration format, default VAt %, total rounding
- **Comment templates** enter the template texts displayed in activity window's comment field. Choose the language of texts
- **Payroll** default texts on new payroll rows
- Divisions:
 - 1) Tick the checkbox to use divisions
 - 2) Title texts language, singular, plural, short name.
- Invoice texts default text rows for new invoices
- Invoice printing:
 - 1) Language default
 - 2) Layouts
 - 3) Letterheads (header logo and footer texts)

Database settings

Click "Tools" > "Database settings" to open the window.

Database setti atabase	ngs	
Server:	HEIDIHANSAR	
Database:	VanZoig	
Authentication		
💿 Windows integ	prated	
OSQL server (u:	ser will be promted for password)	
	Te	st connection
	OK	Cancel

- Enter the name of a server and database
- Authentication windows integrated or SQL server (user will be promted for password)
- After entering your settings, test the connection. Click "OK" to save the settings