



Step-by-Step User Guide

Capture time and disbursements, run billing in minutes, and send professional invoices your clients pay on time. For advocates and independent legal consultants.

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1 Getting started

CounselBilling is a cloud-based fee book for advocates and independent legal consultants. It runs in your browser at **counselbilling.com** — nothing to install, and it works wherever you are.

1. Go to **counselbilling.com** and click **Start your 30-day free trial** (no card required, cancel anytime).
2. Sign in. You'll land on the **Dashboard** — your practice at a glance.
3. Use the sidebar on the left to move between the main areas of the app: **Dashboard, Activities, Clients, Matters, Invoices, Reports, and Settings**.

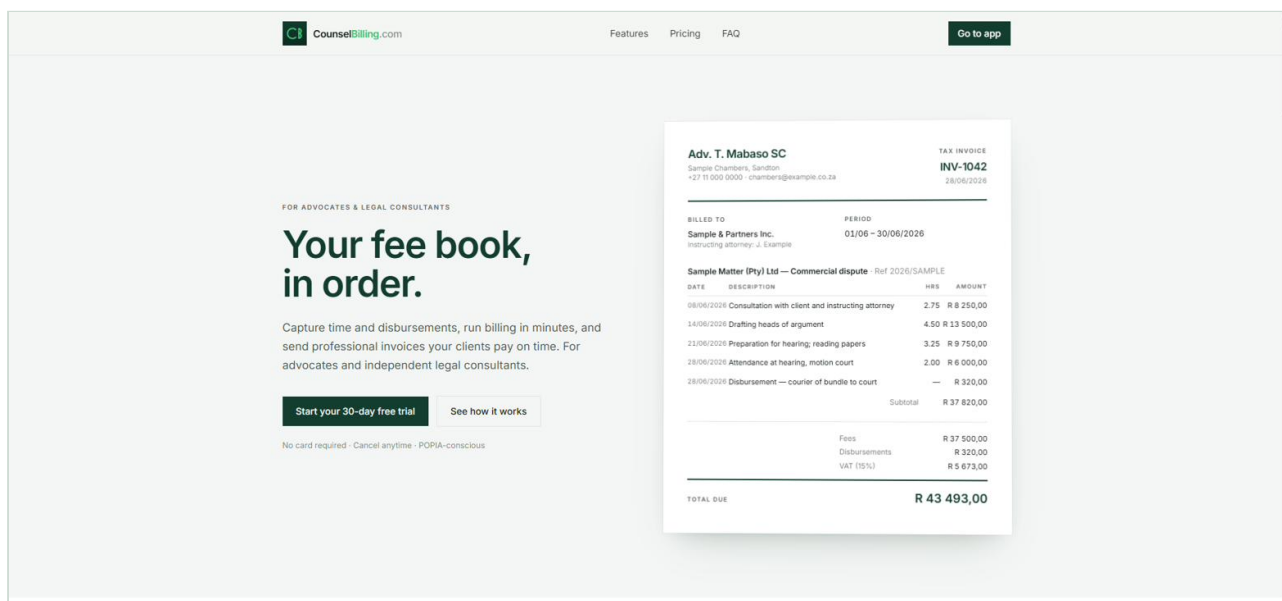


Fig 1.1 — The CounselBilling landing page. Start a 30-day free trial — no card required.

Before you capture your first fee, spend two minutes in **Settings** — everything you enter there flows automatically onto every invoice.

2 Setting up your practice (Settings)

Open **Settings** in the sidebar. This page holds your practice details and defaults, arranged in cards. Click **Edit** on any card to change it.

2.1 Practice details

These appear on every invoice, so get them right once and forget about them:

- **Name** — e.g. *Adv Ben James*
- **Chambers / Address** — e.g. *Group 621, Sandton Chambers*
- **Phone and Email**
- **Banking details** — bank, account type, account number, branch code, and payment reference instruction (e.g. *Ref: invoice number*). These print in the footer of every invoice and statement.

2.2 Locale & tax

Controls currency, date formatting, and the tax label/rate shown on your invoices:

- **Country** (e.g. South Africa), **Currency** (e.g. ZAR) and **Locale** (e.g. en-ZA)
- **Tax charged on invoices** — Yes/No
- **Tax label** — e.g. *VAT (15%)*. The label and rate you set here appear on every invoice's totals block.
- **VAT number** — if you are VAT-registered, enter it here so it appears on your tax invoices.

Not VAT-registered? Set *Tax charged on invoices* to No and your invoices will show fees only, with no tax line.

2.3 Billing defaults

- **Default hourly rate** — used when no client- or matter-specific rate applies (e.g. R 3 200,00).
- **Payment terms** — e.g. 30 days. The invoice due date is calculated from this automatically.
- **Invoice prefix** — e.g. *BJ*. Your invoices are numbered BJ-1001, BJ-1002, and so on.
- **Next invoice number** — where the sequence starts or continues. Numbering is sequential and managed for you.

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Practice

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Urgent interdict: Litt Holdings merger

open

Edit matter

Generate invoice

open

Fees

R 72 000,00

WIP R 72 000,00 · Invoiced R 0,00

Disbursements R 850,00 (WIP R 850,00 · Invoiced R 0,00)

Discount

R 0,00

None

After discount

R 72 000,00

Billing

Rates and discount for this matter.

Edit

BILLING TYPE

Hourly

HOURLY RATE

R 3 200,00 matter override

DISCOUNT

None

Responsible attorney

Harvey Spectro

harvey@spectro-demo.co.za

Harvey Spectro · harvey@spectro-demo.co.za

Invoice recipients

Harvey Spectro · harvey@spectro-demo.co.za

Donna Paulica · donna@spectro-demo.co.za

FIRM-WIDE

LOCKED

ben@advocatedemo.com

Sign out

Fig 2.1 — Settings: practice details, locale & tax, and billing defaults. Everything here flows onto your invoices.

3 Inviting a secretary (Team)

CounselBilling is built for the way an advocate's practice actually runs: a secretary can capture activities and manage billing, while you supervise from anywhere.

1. Go to **Settings** and scroll to the **Team** card.
2. Click **Invite secretary** and enter their email address.
3. They receive an invitation, accept it, and appear under **Members** alongside you (the **Owner**).

Members are listed with their join date and role, so you can always see who has access to your practice.

4 Your subscription (Billing)

The **Billing** card in Settings shows your platform subscription — what you pay CounselBilling, not what your clients pay you.

- **Seat breakdown** — priced per role: advocates at R499/month and secretaries at R249/month, charged in ZAR.
- **Next billing date and amount, and the card on file** — click **Set up billing** to add a payment card.
- **Switch to annual** — pay yearly and get 2 months free.
- **Payment history** — a record of every subscription payment.

The screenshot displays the CounselBilling.com interface. On the left is a sidebar with navigation links: Practice, Dashboard, Activities, Clients, Matters, Invoices, Reports, and Settings. The main content area is titled 'Settings' and contains several sections:

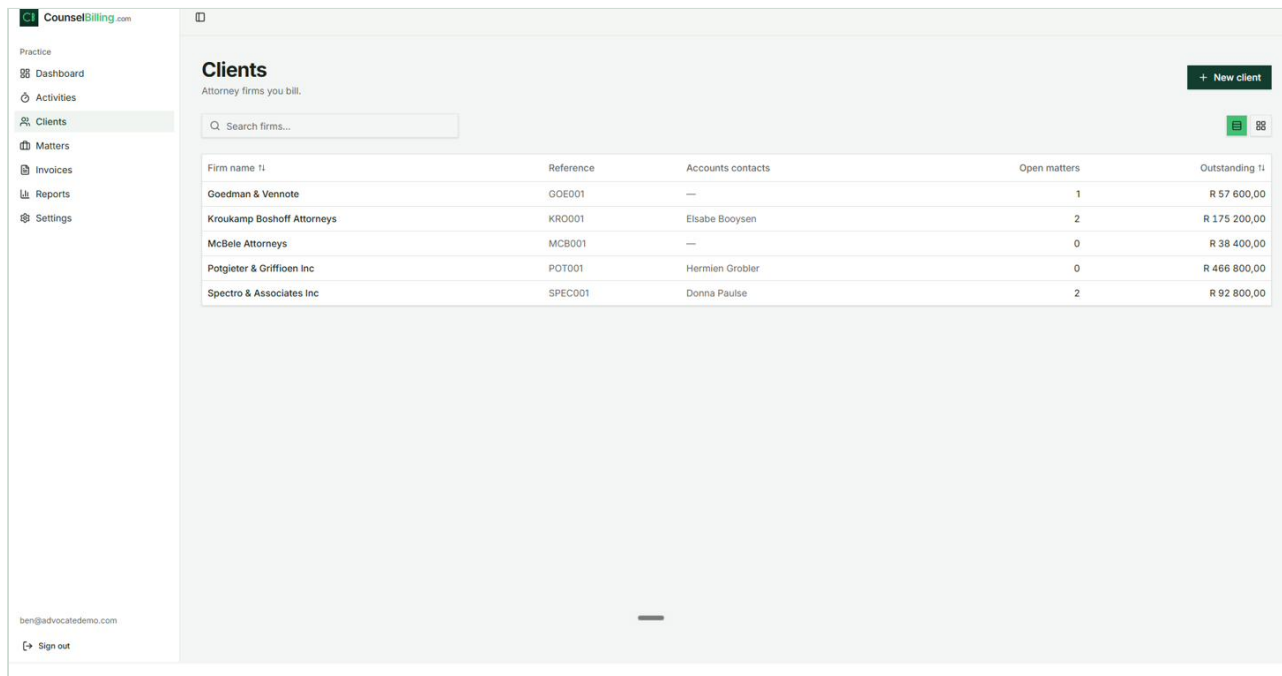
- Invoice recipients:** Lists 'Harvey Spectro' (harvey@spectro-demo.co.za) and 'Donna Paulse' (donna@spectro-demo.co.za). There are buttons for 'FIRM-WIDE' and 'ACCOUNTS'.
- Description:** Shows 'Urgent application to interdict implementation of merger pending arbitration.'
- Fee entries:** A table with columns: Date, Description, Status, Hrs, Rate, and Amount. It contains three entries for dates 24/07/2026, 22/07/2026, and 20/07/2026, all with a status of 'Open'.
- Disbursements:** A table with columns: Date, Description, Amount. It shows one entry for 24/07/2026 for 'Travel' (Zero-rated) with an amount of '1 x R 850,00'.

At the bottom left, there is a 'Sign out' button and the email 'ben@advocatedemo.com'.

Fig 4.1 — Settings (continued): automatic statements, the Team card with Invite secretary, and your platform subscription.

5 Adding clients (attorney firms)

In CounselBilling, a **client** is the attorney firm that briefs you. Open **Clients** in the sidebar. The list shows, for each firm: the firm name, your **reference** code (e.g. GOE001), the **accounts contact**, the number of **open matters**, and the total **outstanding** balance — which firm owes you what, at a glance.



Firm name ¹	Reference	Accounts contacts	Open matters	Outstanding ¹
Goedman & Vennote	GOE001	—	1	R 57 600,00
Kroukamp Boshoff Attorneys	KRO001	Elsabe Booysen	2	R 175 200,00
McBele Attorneys	MCB001	—	0	R 38 400,00
Potgieter & Griffioen Inc	POT001	Hermien Grobler	0	R 466 800,00
Spectro & Associates Inc	SPEC001	Donna Paulse	2	R 92 800,00

Fig 5.1 — The Clients list: reference codes, accounts contacts, open matters, and outstanding balances per firm.

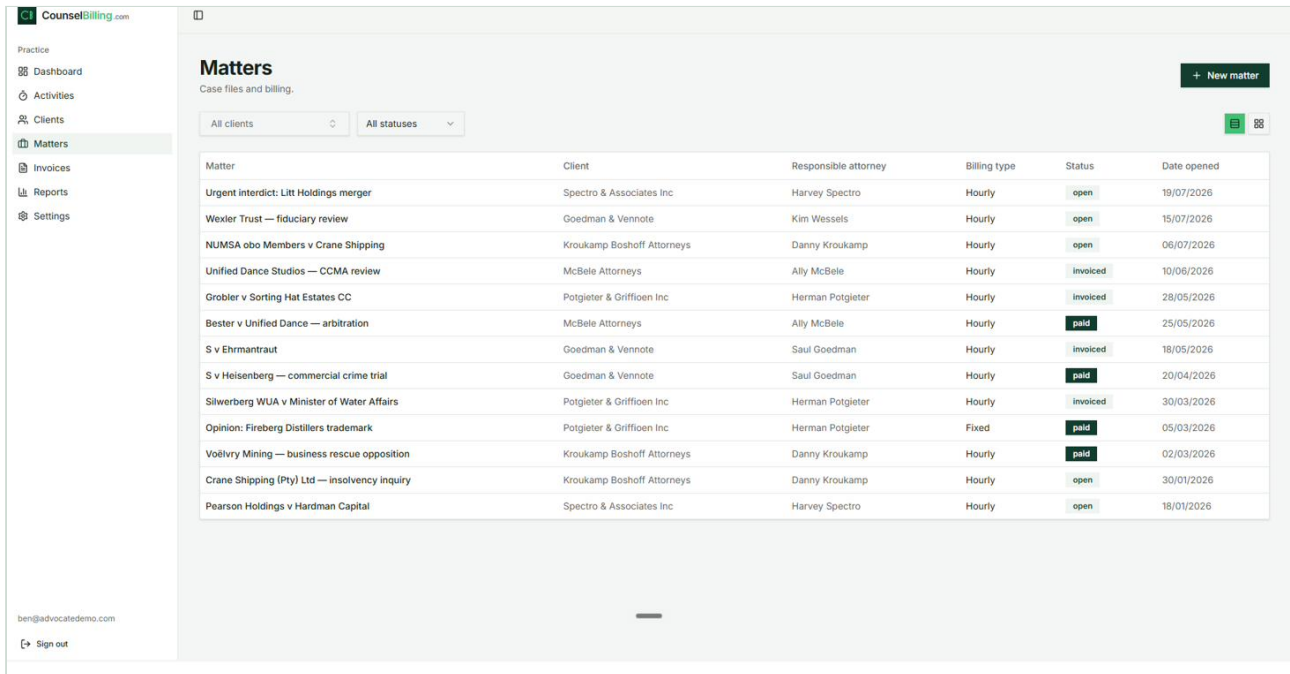
To add a client

1. Click **+ New client**.
2. Enter the **firm name** and **address** (these appear in the *Bill to* block of your invoices).
3. Assign a short **reference** code — it prints on invoices and statements (e.g. *Ref GOE001*).
4. Add contacts:
 - **Accounts contact** — the person in the firm's accounts department; automatically included as a recipient on every invoice for this firm.
 - **Firm-wide recipients** — anyone who should receive all invoices for this firm regardless of matter.

Use the **search box** to find a firm quickly, and the view toggle (top right) to switch between list and card layouts.

6 Creating and managing matters

A **matter** is a single brief or case file. Open **Matters** to see every matter with its client, responsible attorney, billing type, status (open / invoiced / paid), and date opened. Filter by client or status using the dropdowns.



Matter	Client	Responsible attorney	Billing type	Status	Date opened
Urgent interdict: Litt Holdings merger	Spectro & Associates Inc	Harvey Spectro	Hourly	open	19/07/2026
Wexler Trust — fiduciary review	Goedman & Vennote	Kim Wessels	Hourly	open	15/07/2026
NUMSA obo Members v Crane Shipping	Kroukamp Boshoff Attorneys	Danny Kroukamp	Hourly	open	06/07/2026
Unified Dance Studios — CCMA review	McBele Attorneys	Ally McBele	Hourly	invoiced	10/06/2026
Grobler v Sorting Hat Estates CC	Potgieter & Griffioen Inc	Herman Potgieter	Hourly	invoiced	28/05/2026
Bester v Unified Dance — arbitration	McBele Attorneys	Ally McBele	Hourly	paid	25/05/2026
S v Ehrmantraut	Goedman & Vennote	Saul Goedman	Hourly	invoiced	18/05/2026
S v Heisenberg — commercial crime trial	Goedman & Vennote	Saul Goedman	Hourly	paid	20/04/2026
Silwerberg WUA v Minister of Water Affairs	Potgieter & Griffioen Inc	Herman Potgieter	Hourly	invoiced	30/03/2026
Opinion: Fireberg Distillers trademark	Potgieter & Griffioen Inc	Herman Potgieter	Fixed	paid	05/03/2026
Voelvry Mining — business rescue opposition	Kroukamp Boshoff Attorneys	Danny Kroukamp	Hourly	paid	02/03/2026
Crane Shipping (Pty) Ltd — insolvency inquiry	Kroukamp Boshoff Attorneys	Danny Kroukamp	Hourly	open	30/01/2026
Pearson Holdings v Hardman Capital	Spectro & Associates Inc	Harvey Spectro	Hourly	open	18/01/2026

Fig 6.1 — The Matters list: every brief, its firm, responsible attorney, billing type, and status.

6.1 Creating a matter

1. Click **+ New matter**.
2. Give the matter a **name** (e.g. *Urgent interdict: Litt Holdings merger*), select the **client** firm, and add the **case/reference number** (e.g. *2026/31337 (GJ)*) and **date opened**.
3. Choose the **responsible attorney** — the attorney at the firm who briefed you. They're always included on invoices for this matter.
4. Optionally add a **description** of the work.

6.2 Billing type and rates

- **Billing type** — *Hourly* or *Fixed*.
- **Hourly rate** — the rate cascades: your practice default applies unless the client has a firm rate, and a **matter override** beats both. The matter page labels the source of the rate in effect.
- **Discount** — apply a matter-level discount if agreed; the matter header shows *Fees*, *Discount*, and *After discount* side by side.

6.3 The matter at a glance

The top of each matter page summarises the money: **Fees** split into **WIP** (work in progress, not yet invoiced) and **Invoiced**; **Disbursements** with the same split; and the net position **After discount**. This is your unbilled-time number, per matter, in Rands — the value of work you've done but not yet billed.

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ben@advocatedemo.com

Sign out

Invoices

Draft, send, and track payments.

+ New Invoice

Q Search number or client

All clients

All statuses

Number	Client	Date	Due	Total	Paid	Status
BJ-1016	Kroukamp Boshoff Attorneys	24/07/2026	23/08/2026	R 25 600,00	R 0,00	Draft
BJ-1015	Potgieter & Griffioen Inc	22/07/2026	21/08/2026	R 425 600,00	R 0,00	Sent
BJ-1014	Potgieter & Griffioen Inc	15/07/2026	14/08/2026	R 71 200,00	R 30 000,00	Partially paid
BJ-1013	McBele Attorneys	08/07/2026	07/08/2026	R 38 400,00	R 0,00	Sent
BJ-1012	Kroukamp Boshoff Attorneys	27/06/2026	27/07/2026	R 105 600,00	R 0,00	Sent
BJ-1011	McBele Attorneys	26/06/2026	26/07/2026	R 246 400,00	R 246 400,00	Paid
BJ-1010	Goedman & Vennote	10/06/2026	10/07/2026	R 57 600,00	R 0,00	Overdue
BJ-1009	Goedman & Vennote	25/05/2026	24/06/2026	R 323 200,00	R 323 200,00	Paid
BJ-1008	Spectro & Associates Inc	08/05/2026	07/06/2026	R 92 800,00	R 0,00	Overdue
BJ-1007	Potgieter & Griffioen Inc	30/04/2026	30/05/2026	R 278 400,00	R 278 400,00	Paid
BJ-1006	Kroukamp Boshoff Attorneys	27/03/2026	26/04/2026	R 115 200,00	R 115 200,00	Paid
BJ-1005	Spectro & Associates Inc	23/03/2026	22/04/2026	R 371 200,00	R 371 200,00	Paid
BJ-1004	Potgieter & Griffioen Inc	18/03/2026	17/04/2026	R 45 000,00	R 45 000,00	Paid
BJ-1003	Spectro & Associates Inc	28/02/2026	30/03/2026	R 409 600,00	R 409 600,00	Paid
BJ-1002	Kroukamp Boshoff Attorneys	20/02/2026	22/03/2026	R 64 000,00	R 20 000,00	Partially paid
BJ-1001	Spectro & Associates Inc	10/02/2026	12/03/2026	R 86 400,00	R 86 400,00	Paid

Fig 6.2 — A matter page: WIP vs invoiced fees, the billing card with a matter-override rate, and the responsible attorney.

6.4 Invoice recipients

The **Invoice recipients** card lists everyone who receives invoices for this matter. The **responsible attorney** and the client's **accounts** and **firm-wide** contacts are always included and cannot be removed here — badges show why each is on the list. Use the dropdown to add **other attorneys** at the firm for this matter only.

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Reports

Age analysis, statements, payments, and overdue follow-up.

Total outstanding

R 805 200,00

Receivables across all clients

Overdue

R 194 400,00

Past due date, unpaid

Collected this month

R 599 600,00

Payments received

WIP

R 112 770,00

Unbilled time, expenses & drafts

Age analysis

Outstanding receivables bucketed Current / 31-60 / 61-90 / 91-120 / 120+, per client, as at any date.

Client statement

A client-ready A4 statement: invoices, payments and running balance for any period.

Payments received

Payments in a period with methods, receipts, and average days-to-pay by firm.

Overdue

Every invoice past its due date, grouped by client with follow-up contacts at a glance.

Fig 6.3 — Recipients, matter description, and the fee entries table further down the matter page.

7 Capturing time and disbursements (Activities)

There are two places to capture work: on the **matter page** (via **+ Add entry** / **+ Add disbursement**) or on the **Activities** page, which shows everything across all matters. Both feed the same fee book.

7.1 Adding a fee entry (time)

1. On a matter, click **+ Add entry** (or use the quick-capture row on Activities with the **Time** tab selected).
2. Fill in the **date**, a **description** (e.g. *Drafting Summons and particulars of claim (1 day)*), the **hours**, and the **rate** — pre-filled from the matter rate; change it for this entry only if needed.
3. The **amount** calculates live as you type (e.g. $10 \times R\ 3\ 200 = R\ 32\ 000,00$).
4. Click **Add entry**. The entry appears with status **Open** — ready to be invoiced.

The screenshot shows the 'Client statement' interface in CounselBilling.com. It includes a sidebar with navigation options like Dashboard, Activities, Clients, Matters, Invoices, Reports, and Settings. The main content area displays a statement for 'Adv Ben James' covering the period from 01/05/2026 to 31/07/2026. The statement lists several transactions: an opening balance of R 64 000,00, a payment received of R 20 000,00, and an invoice of R 105 600,00. The closing balance is R 149 600,00. Below the transactions, there is an 'AGE ANALYSIS AS AT 31/07/2026' table and 'BANKING DETAILS'.

DATE	REF	DESCRIPTION	DEBIT	CREDIT	BALANCE
01/05/2026		Opening balance			R 64 000,00
15/05/2026	BJ-1002	Payment received (eft) - KRO-EFT-2291 — BJ-1002		R 20 000,00	R 44 000,00
27/06/2026	BJ-1012	Invoice BJ-1012 (due 27/07/2026)	R 105 600,00		R 149 600,00

Current	31-60	61-90	91-120	120+
R 0,00	R 105 600,00	R 0,00	R 0,00	R 44 000,00

Fig 7.1 — The Add fee entry dialog: date, description, hours, rate — the amount calculates as you type.

7.2 Adding a disbursement (expense)

1. Click **+ Add disbursement** on the matter (or select the **Disbursement** tab on Activities).
2. Enter the date, a **category** (e.g. Travel), a description, quantity, and unit amount.
3. Mark the VAT treatment where relevant — e.g. *Zero-rated* / *VAT-exempt* — so it totals correctly on the invoice.

7.3 Working in the Activities view

- The header totals the period: **Hours**, **Fees**, **Disbursements**, and the split between **Open**, **Draft**, and **Invoiced** amounts. Navigate periods with the arrows.
- Filter by search text, **type** (time/disbursement), **status**, and **who captured it** — useful when a secretary captures on your behalf; the *Captured* column shows who entered each item.
- Billed entries show an **Invoiced** badge with the invoice number (e.g. *Invoiced · BJ-1015*), so you can trace any entry to its invoice.

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Time entries and disbursements — capture and review across all matters.

<

This month

>

July 2026

Hours 169.75

Fees R 543 200,00

Disb. R 3 970,00

Open R 87 170,00

Draft R 25 600,00

Invoiced R 434 400,00

Search description, client, matter...

All types

All statuses

Everyone

Date	Type	Matter	Description	Hrs/Qty	Rate/Unit	Amount	Status	Capture
Time Disbursement								
25/07/2026	Time	Select matter...	Description	1		R 0,00		
24/07/2026	Time	Goedman & Vennote S v Ehrmantraut - CAS 662/05/2026	Pre-trial consultation with attorney and client	3.00	R 3 200,00	R 9 600,00	Open	You
24/07/2026	Time	Spectro & Associates Inc Urgent Interdict: Litt Holdings merger - 2...	Appearance: urgent court (opposed motion)	6.00	R 3 200,00	R 19 200,00	Open	You
24/07/2026	Expense	Spectro & Associates Inc Urgent Interdict: Litt Holdings merger - 2...	Counsel's travel — urgent hearing Zero-rated / VAT-exempt	1	R 850,00	R 850,00	Open	You
23/07/2026	Time	Goedman & Vennote Wester Trust — fiduciary review	Perusal of trust deed and advice on trustee fiduciary duties	3.50	R 3 200,00	R 11 200,00	Open	You
22/07/2026	Time	Spectro & Associates Inc Urgent Interdict: Litt Holdings merger - 2...	Drafting urgent application papers (founding affidavit and notice of motion)	7.00	R 3 200,00	R 22 400,00	Open	You
21/07/2026	Time	Kroukamp Boshoff Attorneys Crane Shipping (Pty) Ltd — insolvency L...	Preparation: insolvency inquiry — day 2 examination	4.00	R 3 200,00	R 12 800,00	Open	You
21/07/2026	Time	Potgieter & Griffioen Inc Silverberg WUA v Minister of Water Aff...	Appearance: review hearing (full day)	10.00	R 3 200,00	R 32 000,00	Invoiced - BJ-1015	You
20/07/2026	Time	Potgieter & Griffioen Inc Silverberg WUA v Minister of Water Aff...	Preparation for oral argument	10.00	R 3 200,00	R 32 000,00	Invoiced - BJ-1015	You
20/07/2026	Time	Spectro & Associates Inc Urgent Interdict: Litt Holdings merger - 2...	Urgent consultation re interdict against Litt Holdings merger	2.50	R 3 200,00	R 8 000,00	Open	You

ben@advocatedemo.com

Sign out

Fig 7.2 — Activities: the practice-wide ledger of time and expenses, with period totals and per-entry status.

Tip: capture time daily, even roughly. The quick-capture row takes seconds, and your WIP number stays honest.

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8 Generating an invoice from a matter

When you're ready to bill a matter:

1. Open the matter and click **Generate invoice**.
2. CounselBilling pulls in the matter's **open fee entries and disbursements**, applies the correct rate and any discount, calculates VAT per your settings, and assigns the **next sequential invoice number**.
3. The invoice is created as a **Draft** — nothing is sent yet. Review it, then move it through the lifecycle in the next section.

The invoice document itself is clean and professional: your practice details at the top, the *Bill to* firm with your reference, the invoice and due dates, the matter heading with its case number, dated line items with hours/rate/amount, the totals block (Subtotal, VAT, **Total due**), and your **banking details** and **recipients** at the bottom.

Adv Ben James INVOICE
Group 621, Sandton Chambers
+27 11 555 0621
beni@advocatedemo.com

BJ1017

BILL TO: **Goedman & Vennote** INVOICE DATE: 25 Jul 2026
2nd Floor, Cinnabar Mall, 300 Beltline Weg, Albuquerque Park, Johannesburg, 2094 DUE DATE: 24 Aug 2026
Ref GDE001

DATE	DESCRIPTION	HRS	RATE	AMOUNT
24 Jul 2026	S v Ehrmantraut CAS 662/05/2026 Pre-trial consultation with attorney and client	3.00	R 3,200.00	R 9,600.00
	Subtotal			R 9,600.00
	VAT (15%)			R 1,440.00
	Total			R 11,040.00

BANKING DETAILS
First Fictional Bank - Current account - Acc 620 1234 5678 - Branch 250 655 - Ref: invoice number

RECIPIENTS
Saul Goodman - saul@goedman-demo.co.za
Kim Wessels - kim@goedman-demo.co.za

Fig 8.1 — A single-item fee note (BJ1017).

Adv Ben James INVOICE
Group 621, Sandton Chambers
+27 11 555 0621
beni@advocatedemo.com

BJ1018

BILL TO: **Spectro & Associates Inc** INVOICE DATE: 25 Jul 2026
12th Floor, Pearson House, 45 Fredman Drive, Sandton, 2196 DUE DATE: 24 Aug 2026
Ref SPEC001

DATE	DESCRIPTION	HRS	RATE	AMOUNT
20 Jul 2026	Urgent interdict: Litt Holdings merger - 2026/31337 (GJ) Urgent consultation re interdict against Litt Holdings merger	2.50	R 3,200.00	R 8,000.00
22 Jul 2026	Drafting urgent application papers (founding affidavit and notice of motion)	10.00	R 3,200.00	R 32,000.00
24 Jul 2026	Appearance: urgent court (opposed motion)	10.00	R 3,200.00	R 32,000.00
	Subtotal			R 72,000.00
	VAT (15%)			R 10,800.00
	Total			R 82,800.00

BANKING DETAILS
First Fictional Bank - Current account - Acc 620 1234 5678 - Branch 250 655 - Ref: invoice number

RECIPIENTS
Harvey Spectro - harvey@spectro-demo.co.za
Donna Paulse - donna@spectro-demo.co.za

Fig 8.2 — A multi-line fee note for an urgent application (BJ1018).

9 The invoice lifecycle

Open **Invoices** for the full register: number, client, date, due date, total, amount paid, and status. Search by number or client, and filter by client or status.

Fig 9.1 — The invoice register: every fee note with its total, amount paid, and status.

Status	Meaning
Draft	Created but not finalised. Still editable.
Approved	Finalised and ready to send.
Sent	Emailed or delivered to the client. The clock on payment terms is running.
Partially paid	Some payment received; balance still outstanding.
Paid	Settled in full.
Overdue	Past its due date and not fully paid. Flagged automatically.
Void	Cancelled.

Actions on an invoice

Open any invoice to see the full document plus an action bar:

- **Print** — print directly from the browser. *Untick "Headers and footers" in the print dialog for a clean page.*
- **Download PDF** — a PDF fee note to save or attach.
- **Mark as sent** — if you delivered it outside the app.
- **Email invoice** — send it to the matter's recipients directly from CounselBilling.
- **Revert to draft** — pull it back for corrections before it's paid.

- **Record payment / Mark as paid** — see the next section.
- **Void** — cancel the invoice.

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Overdue

Invoices past their due date, as at 25/07/2026

Tip: for a clean PDF, untick "Headers and footers" in the browser print dialog. X

Print

Export CSV

Total overdue

R 194 400,00

Overdue invoices

3

Clients affected

3

Spectro & Associates Inc

R 92 800,00

Donna Paulise - donna@spectro-demo.co.za

Invoice	Issued	Due	Days overdue	Total	Paid	Outstanding
BJ-1008		08/05/2026	07/06/2026 48 days	R 92 800,00	R 0,00	R 92 800,00
Subtotal — Spectro & Associates Inc.						R 92 800,00

Goedman & Vennote

R 57 600,00

No accounts contact with an email on file.

Invoice	Issued	Due	Days overdue	Total	Paid	Outstanding
BJ-1010		10/06/2026	10/07/2026 15 days	R 57 600,00	R 0,00	R 57 600,00
Subtotal — Goedman & Vennote						R 57 600,00

Kroukamp Boshoff Attorneys

R 44 000,00

Elisabe Booysen - accounts@kroukamp-demo.co.za

Invoice	Issued	Due	Days overdue	Total	Paid	Outstanding
BJ-1002		20/02/2026	22/03/2026 125 days	R 64 000,00	R 20 000,00	R 44 000,00
Subtotal — Kroukamp Boshoff Attorneys						R 44 000,00

Fig 9.2 — An approved invoice with its action bar: print, download, send, record payment, or void.

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10 Recording payments

When money arrives:

1. Open the invoice and click **Record payment**.
2. Enter the **amount**, **date**, **method** (e.g. EFT), and the bank **reference** (e.g. *GOE-EFT-5512*).
3. The invoice status updates automatically — **Partially paid** if there's a balance, **Paid** if settled — and the payment appears in the Dashboard's recent activity and the Payments received report.

Partial payments are handled naturally: the register shows the total, the amount paid, and the status side by side (e.g. R 71 200,00 total, R 30 000,00 paid, *Partially paid*).

11 The Dashboard

The **Dashboard** is your practice at a glance — the first screen after sign-in:

- **Total outstanding** — receivables across all clients.
- **Total overdue** — the portion past due date.
- **Paid this month** — cash received. **Billed this month** — invoices raised.
- **WIP (unbilled + draft)** — the value of work done but not yet billed. This is the number that lets you plan: what's genuinely coming to you before a single fee note goes out.

Below the cards, **Recent activity** lists invoices, payments, receipts, and matters — latest first — so you can supervise everything without opening each record.

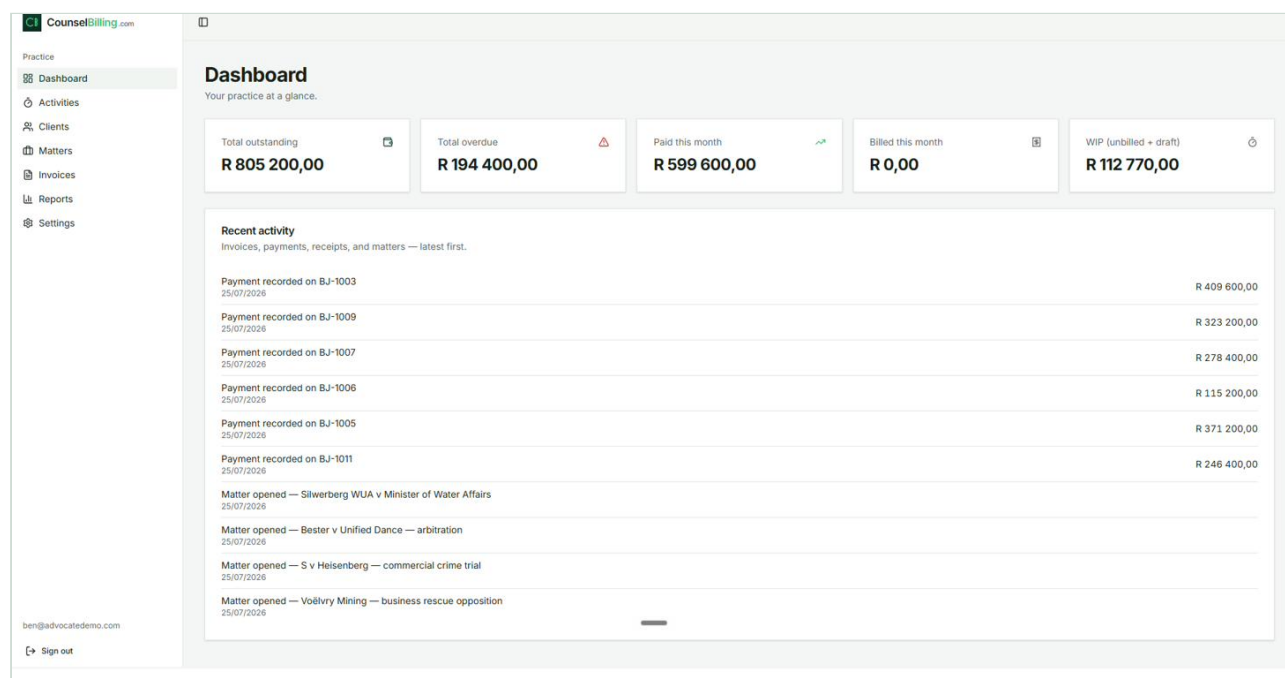


Fig 11.1 — The Dashboard: outstanding, overdue, paid, billed, and WIP — plus the practice's recent activity.

12 Reports

Open **Reports** for four purpose-built reports, each with **Print** and **Export CSV** buttons. The landing page repeats the headline cards (Total outstanding, Overdue, Collected this month, WIP).

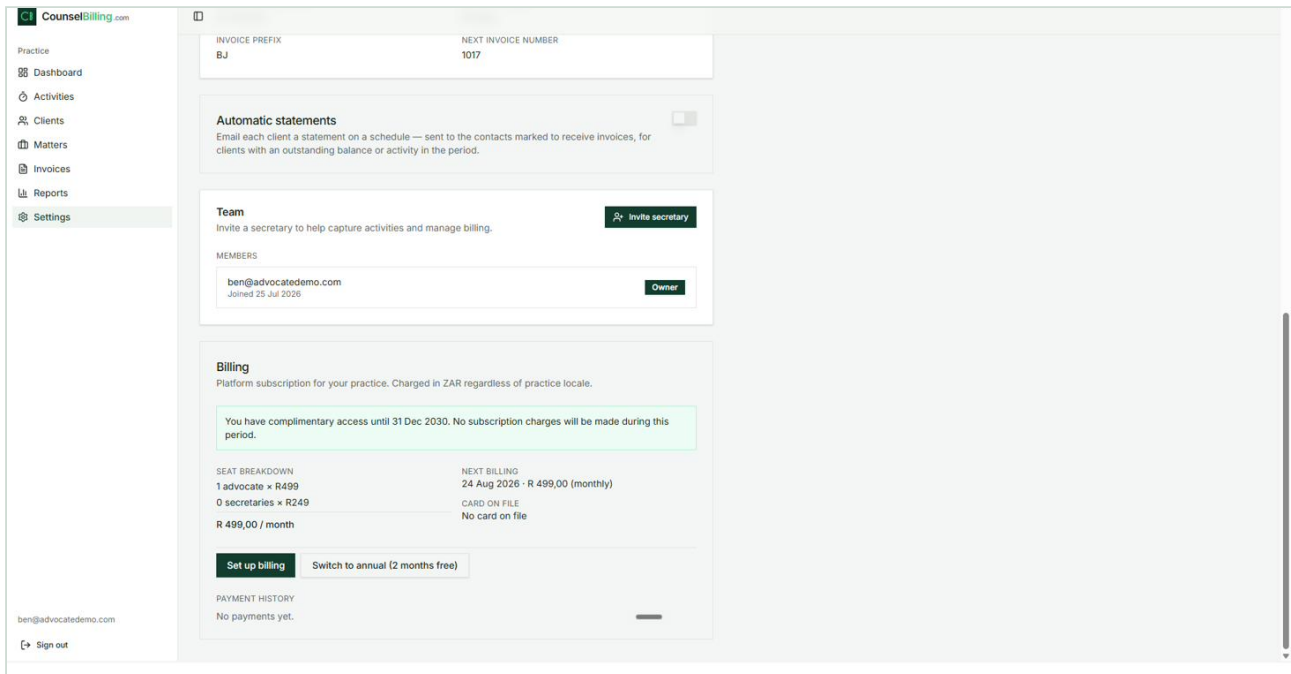


Fig 12.1 — The Reports hub: age analysis, client statements, payments received, and overdue follow-up.

12.1 Age analysis

Outstanding receivables bucketed **Current (0–30) / 31–60 / 61–90 / 91–120 / 120+ days**, per client, as at any date you choose. Summary cards and a colour bar show the health of your book at a glance; the **By client** table breaks each firm's balance into buckets — expand a row for the underlying invoices. Use it monthly to decide who needs a reminder before a balance ages past the point of remembering.

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Practice

Dashboard

Activities

Clients

Matters

Invoices

Reports

Settings

< Matters

Urgent interdict: Litt Holdings merger

open

Edit matter

Generate invoice

open

Fees

R 49 600,00

WIP R 49 600,00 · Invoiced R 0,00

Disbursements R 850,00 (WIP R 850,00 · Invoiced R 0,00)

Discount

R 0,00

None

After discount

R 49 600,00

Billing

Rates and discount for this matter.

Edit

BILLING TYPE

Hourly

HOURLY RATE

R 3 200,00 matter override

DISCOUNT

None

Responsible attorney

Harvey Spectro

harvey@spectro-demo.co.za

Harvey Spectro · harvey@spectro-demo.co.za

Invoice recipients

Harvey Spectro · harvey@spectro-demo.co.za

Donna Paulse · donna@spectro-demo.co.za

FIRM-WIDE

ACCOUNTS

ben@advocatedemo.com

Sign out

Fig 12.2 — Age analysis: the whole book bucketed by age, per client.

12.2 Client statement

A client-ready A4 statement for any firm and period. Choose the **Client** and **Period**; the statement shows an opening balance, every invoice and payment in date order with a running balance, the **closing balance**, a mini age analysis, and your banking details. **Download PDF**, **Print**, or click **Email statement** to send it straight to the firm's contacts.

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Responsible attorney

Harvey Spectro

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Harvey Spectro · harvey@spectro-demo.co.za

Invoice recipients

Harvey Spectro · harvey@spectro-demo.co.za

Donna Paulse · donna@spectro-demo.co.za

No other attorneys — add one

FIRM-WIDE

ACCOUNTS

Description

Urgent application to interdict implementation of merger pending arbitration.

Fee entries

Open + on draft

+ Add entry

Date 1:	Description 1:	Status 1:	Hrs 1:	Rate 1:	Amount 1:
24/07/2026	Appearance: urgent court (opposed motion)	Open	6.00	R 3 200,00	R 19 200,00
22/07/2026	Drafting urgent application papers (founding affidavit and notice of motion)	Open	7.00	R 3 200,00	R 22 400,00
20/07/2026	Urgent consultation re interdict against Litt Holdings merger	Open	2.50	R 3 200,00	R 8 000,00

ben@advocatedemo.com

Sign out

Fig 12.3 — A client statement: invoices, payments, running balance, and age analysis for the period.

12.3 Payments received

Cash-in for a period, filterable by **period**, **client**, and **method**. Cards show the **amount received**, the **number of payments**, and **average days to pay**; a received-per-day chart and a detailed table (date, client, invoice, amount, method, reference, receipt) complete the picture.

Invoice recipients

Harvey Spectro · harvey@spectro-demo.co.za
Donna Pause · donna@spectro-demo.co.za

No other attorneys — add one

Accounts and firm-wide recipients (set on the client) and the responsible attorney are always included and cannot be removed here.

Description

Urgent application to interdict implementation of merger pending arbitration.

Fee entries

Date ↕	Description ↕	Status ↕	Hrs ↕	Rate ↕	Amount ↕
24/07/2026	Appearance: urgent court (opposed motion)	Open	6.00	R 3 200,00	R 19 200,00
22/07/2026	Drafting urgent application papers (founding affidavit and notice of motion)	Open	7.00	R 3 200,00	R 22 400,00
20/07/2026	Urgent consultation re interdict against Litt Holdings merger	Open	2.50	R 3 200,00	R 8 000,00

Disbursements

Date	Description	Amount	Reference	Receipt
24/07/2026	Travel Zero-rated	Counsel's travel — urgent hearing	1 × R 850,00	R 850,00

Fig 12.4 — Payments received: cash-in, days-to-pay, and every payment with its bank reference.

12.4 Overdue

Every invoice past its due date, grouped by client, with the follow-up contact at a glance. Cards summarise **total overdue**, **overdue invoices**, and **clients affected**; each client block lists its overdue invoices with **days overdue** badges and outstanding balances — plus the accounts contact's name and email, so the follow-up is one click away. If a firm has *no accounts contact with an email on file*, the report tells you, so you can fix the client record.

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Invoice recipients

Harvey Spectro · harvey@spectro-demo.co.za

Donna Paulse · donna@spectro-demo.co.za

No other attorneys — add one

Accounts and firm-wide recipients (set on the client) and the responsible attorneys

Firm-wide

ACCOUNTS

Description

Urgent application to interdict implementation of merger p...

Fee entries

Date ↕	Description ↕	Hours ↕	Rate (R) ↕	Amount ↕
24/07/2026	Appearance: urgent	6.00	R 3 200,00	R 19 200,00
22/07/2026	Drafting urgent appl and notice of motion	7.00	R 3 200,00	R 22 400,00
20/07/2026	Urgent consultation re interdict against Lit Holdings merger	2.50	R 3 200,00	R 8 000,00

Amount: R 32 000,00

Add entry

Disbursements

Date ↕	Description ↕	Amount ↕
24/07/2026	Travel: Zebra - travel	1 × R 850,00

Add Disbursement

ben@edvocatedemo.com

Sign out

Fig 12.5 — Overdue: who owes what, how late it is, and exactly whom to email about it.

13 Automatic statements

In **Settings**, the **Automatic statements** toggle emails each client a statement on a schedule — sent to the contacts marked to receive invoices, for clients with an outstanding balance or activity in the period.

Switch it on and the polite, consistent follow-up simply happens in the background: no one has to remember to draw and send statements, and outstanding fees stop ageing quietly.

14 Tips and troubleshooting

- **Clean PDFs from Print** — in the browser print dialog, untick "*Headers and footers*" so the browser's URL and date don't print on your fee note. (The app shows this tip on invoice and report pages until you dismiss it.)
- **Rates not what you expect?** Check the cascade: matter override → client rate → practice default. The matter page labels which one is applying.
- **Someone missing from an invoice?** Recipients come from three places: the matter's responsible attorney, the client's accounts contact, and the client's firm-wide recipients — plus any per-matter extras. Fix it at the source (client or matter) and future invoices follow.
- **Need to correct a sent invoice?** Use **Revert to draft**, fix it, and re-approve. Use **Void** only when the invoice shouldn't exist at all — the number stays used, keeping your sequence auditable.
- **Secretary capturing on your behalf?** The Activities *Captured* column shows who entered each item, and the *Everyone* filter lets you review just your own or just theirs.
- **Watching cash flow?** Dashboard **WIP** tells you what's coming; **Age analysis** tells you what's stuck; **Payments received** → **Average days to pay** tells you how fast firms actually settle.

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