CounselBilling.com

CB

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.

Version July 2026 · counselbilling.com

Everything you need to run your billing. Nothing you don't.

Contents

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**.

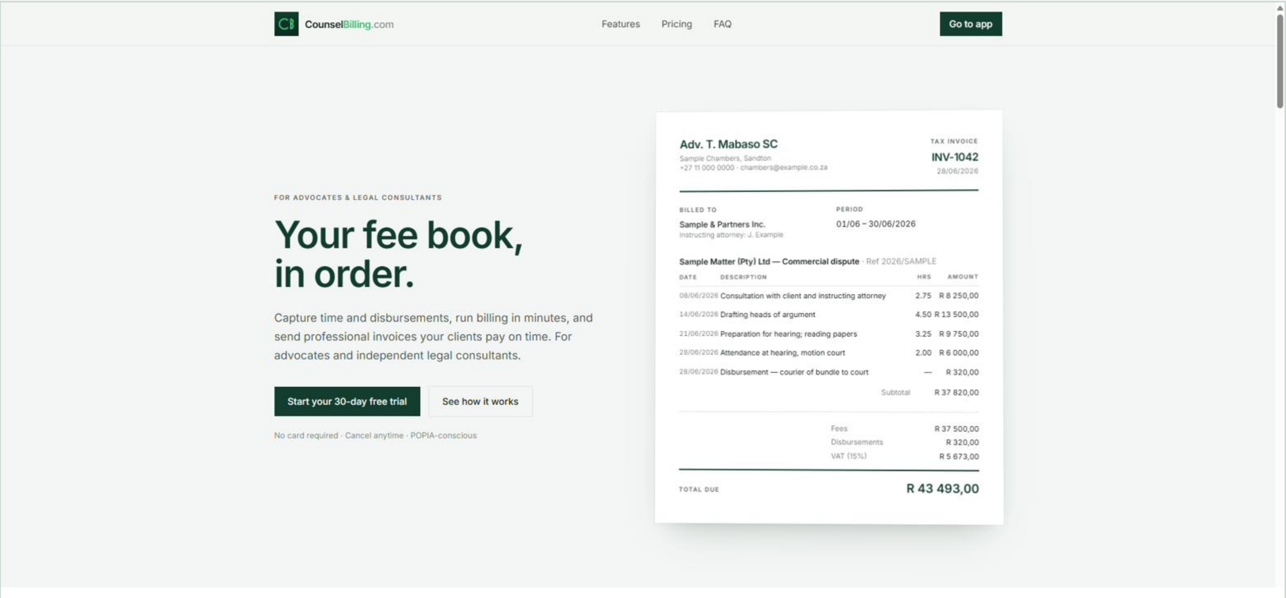

Fig 1.1 — The CounselBilling landing page. Start a 30-day free trial — no card required.

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.

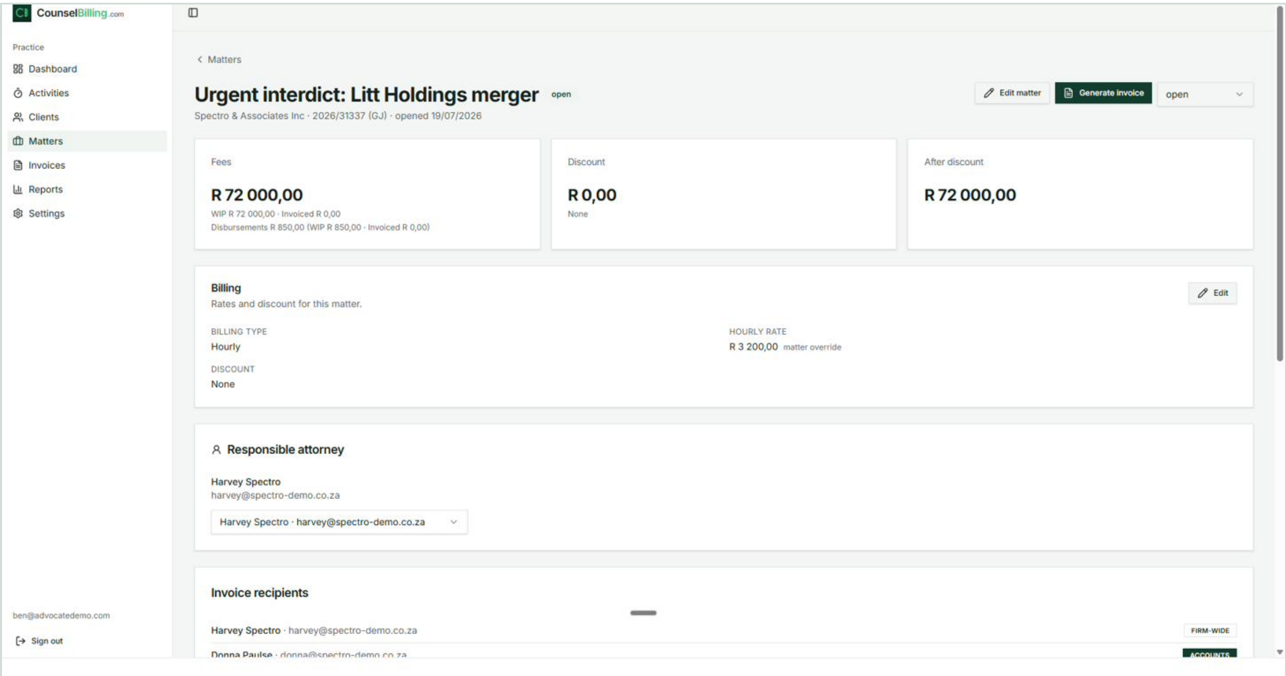

Fig 2.1 — Settings: practice details, locale & tax, and billing defaults. Everything here flows onto your invoices.

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.

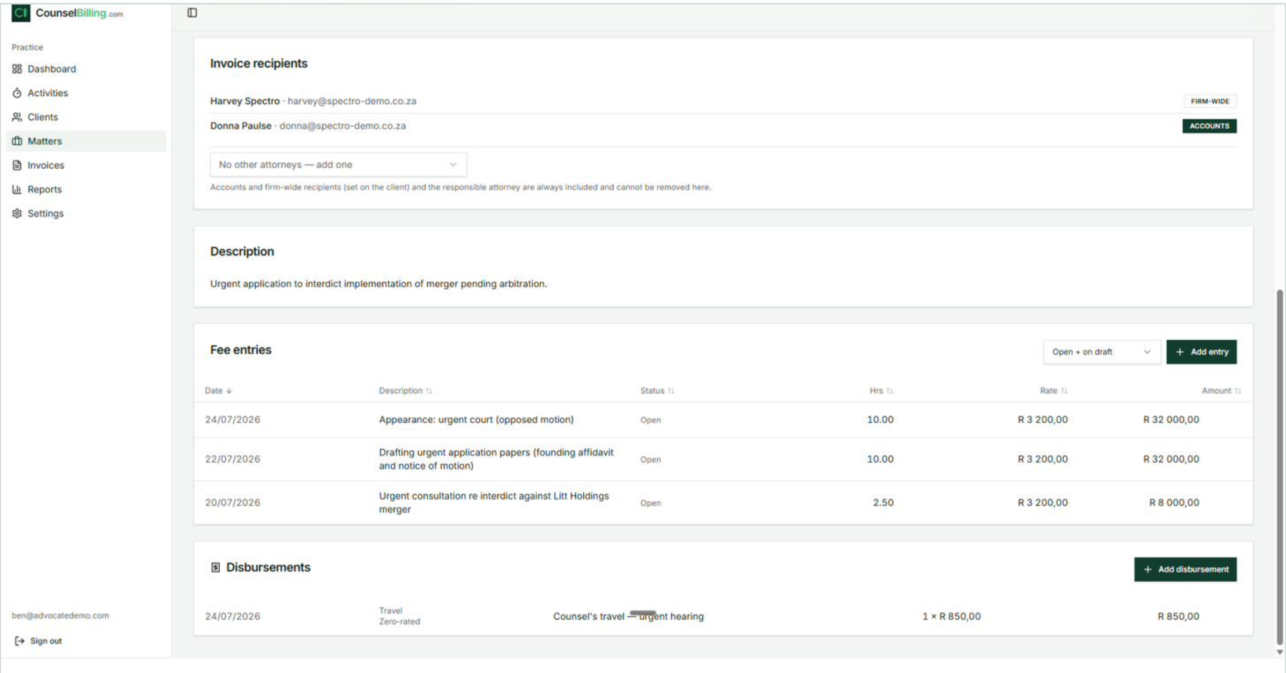

Fig 4.1 — Settings (continued): automatic statements, the Team card with Invite secretary, and your platform subscription.

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.

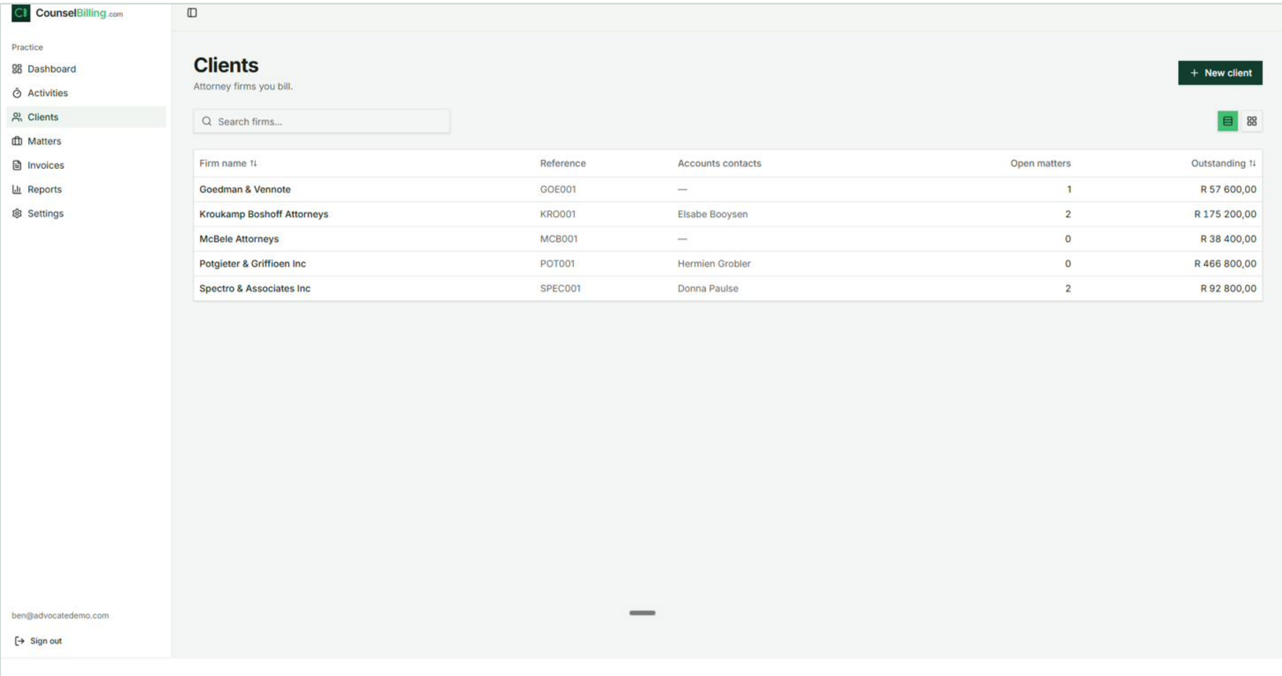

Fig 5.1 — The Clients list: reference codes, accounts contacts, open matters, and outstanding balances per firm.

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.

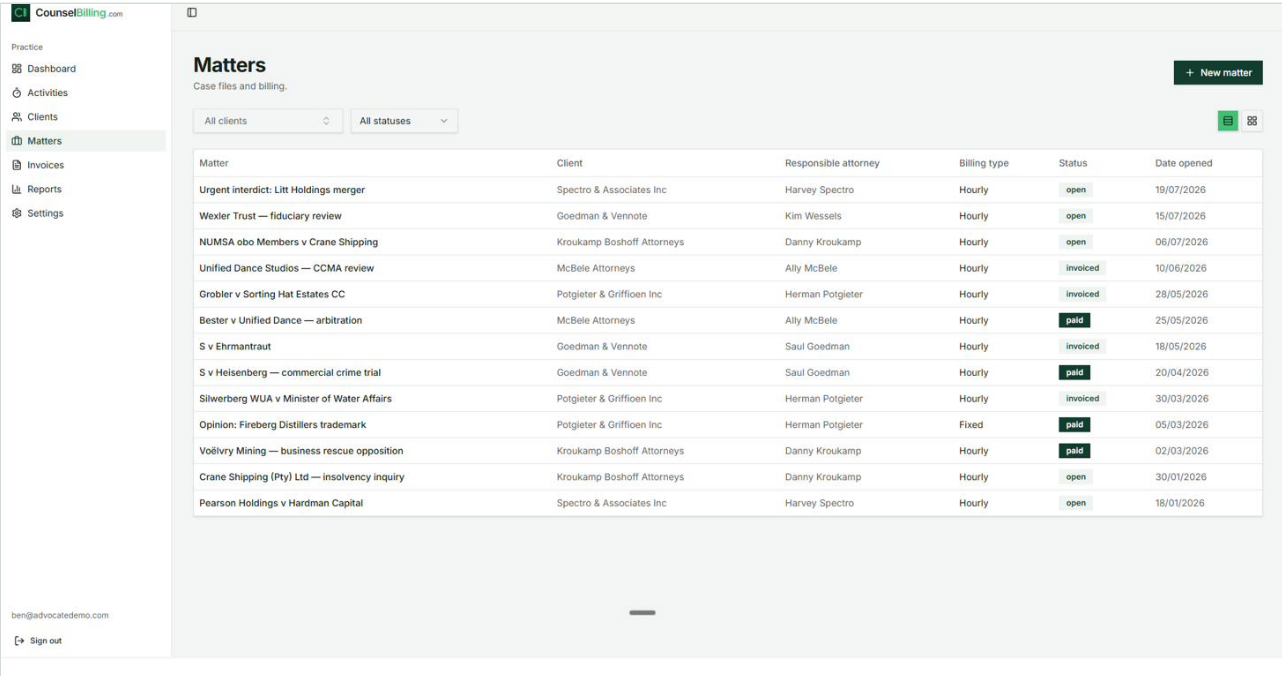

Fig 6.1 — The Matters list: every brief, its firm, responsible attorney, billing type, and status.

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.

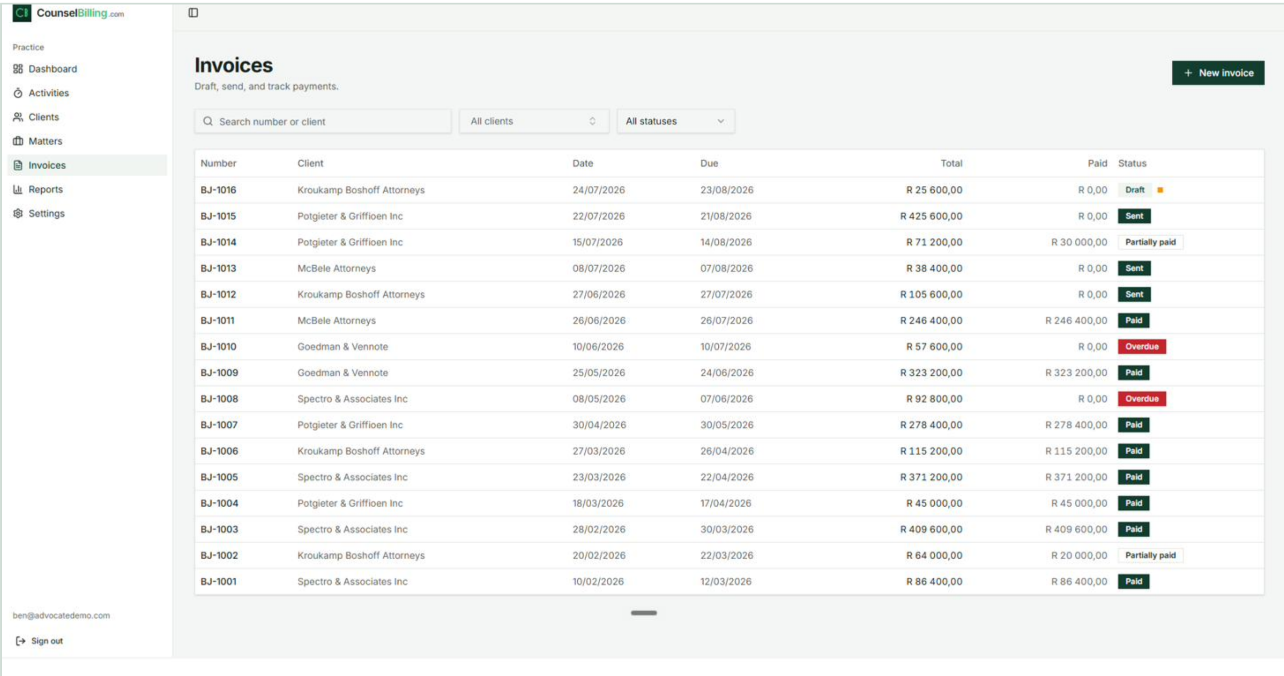

Fig 6.2 — A matter page: WIP vs invoiced fees, the billing card with a matter-override rate, and the responsible attorney.

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.

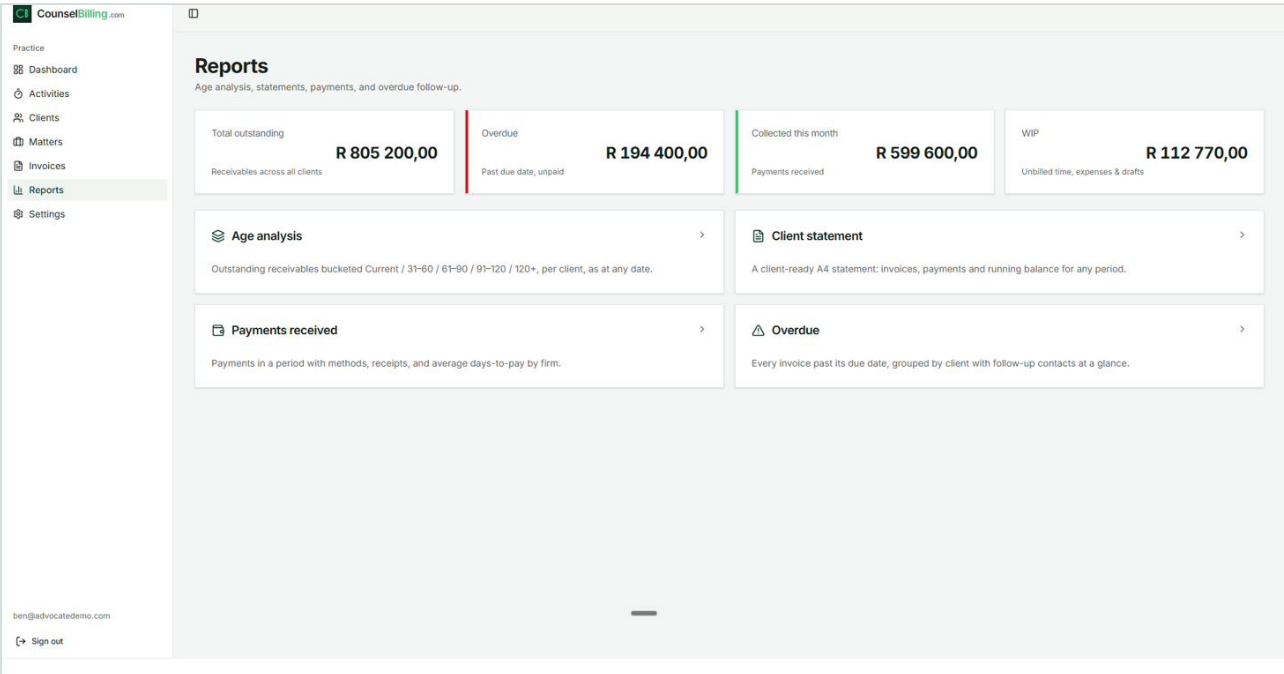

Fig 6.3 — Recipients, matter description, and the fee entries table further down the matter page.

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 × R 3 200 = R 32 000,00).
4. Click **Add entry**. The entry appears with status **Open** — ready to be invoiced.

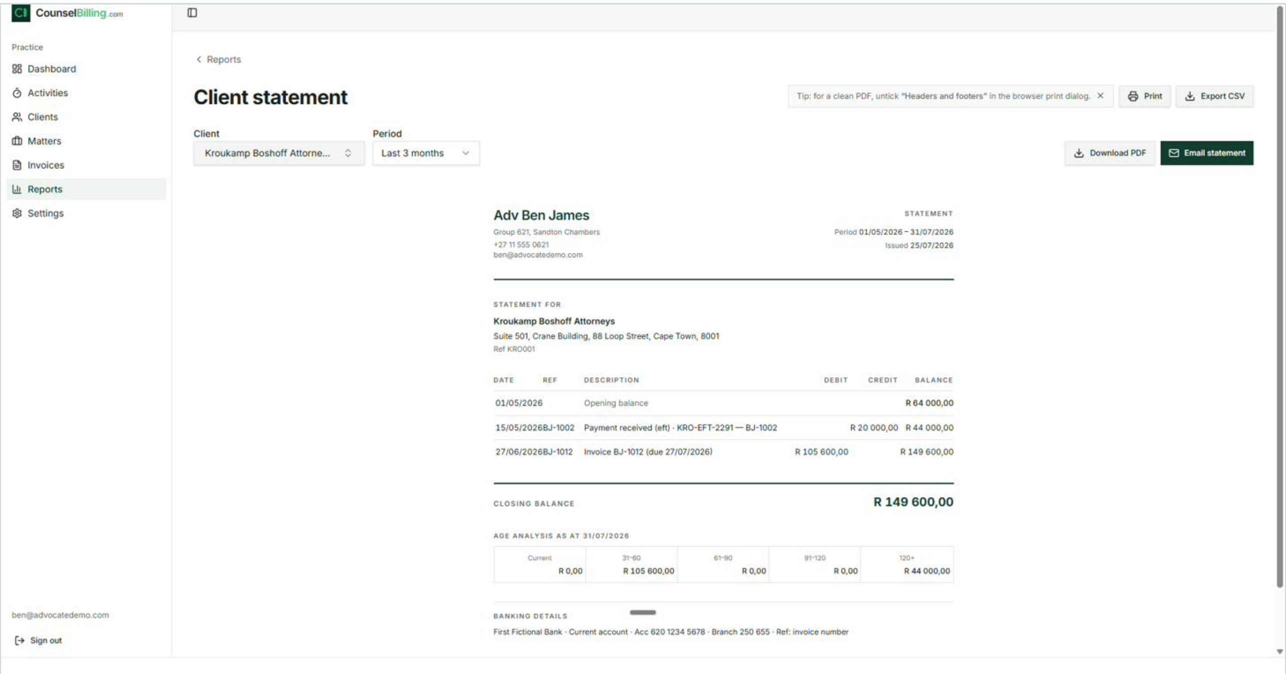

Fig 7.1 — The Add fee entry dialog: date, description, hours, rate — the amount calculates as you type.

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.

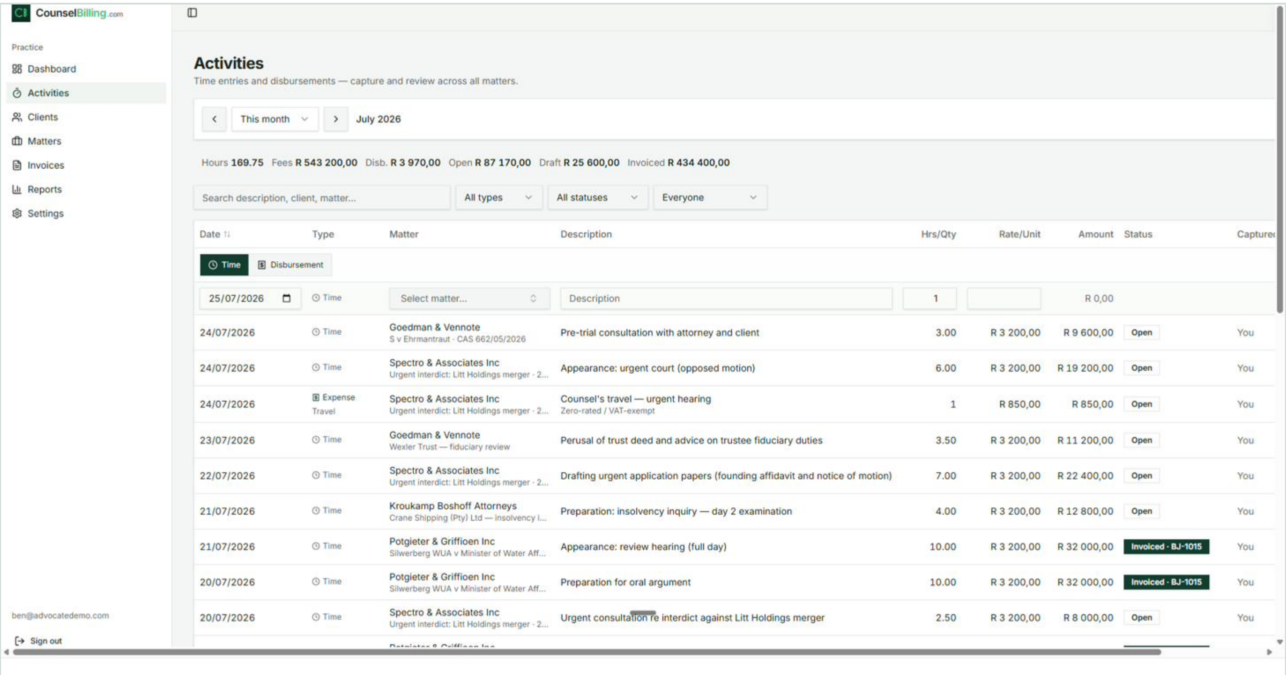

Fig 7.2 — Activities: the practice-wide ledger of time and expenses, with period totals and per-entry status.

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

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
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+27 11 555 0621
ben@advocatedemo.com

INVOICE
BJ1017

BILL TO
Goedman & Vennote
2nd Floor, Cinnabar Mall, 300 Beltline Weg, Albuquerque Park, Johannesburg, 2094
Ref GOE001

INVOICE DATE 25 Jul 2026
DUE DATE 24 Aug 2026

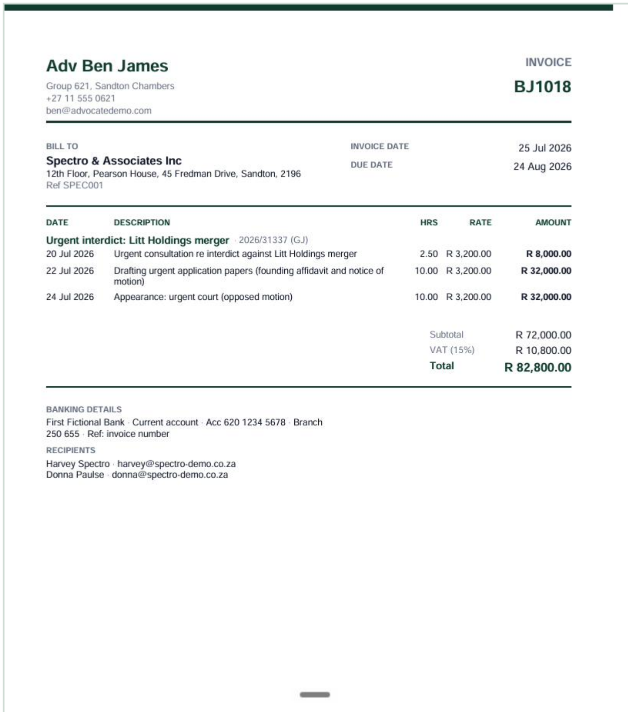
DATE	DESCRIPTION	HRS	RATE	AMOUNT
S v Ehrmantraut · CAS 662/05/2026				
24 Jul 2026	Pre-trial consultation with attorney and client	3.00	R 3,200.00	**R 9,600.00**

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 Goedman · saul@goedman-demo.co.za
Kim Wessels · kim@goedman-demo.co.za

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



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

INVOICE
BJ1018

BILL TO
Spectro & Associates Inc
12th Floor, Pearson House, 45 Fredman Drive, Sandton, 2196
Ref SPEC001

INVOICE DATE 25 Jul 2026
DUE DATE 24 Aug 2026

DATE	DESCRIPTION	HRS	RATE	AMOUNT
Urgent interdict: Litt Holdings merger · 2026/31337 (GJ)				
20 Jul 2026	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.

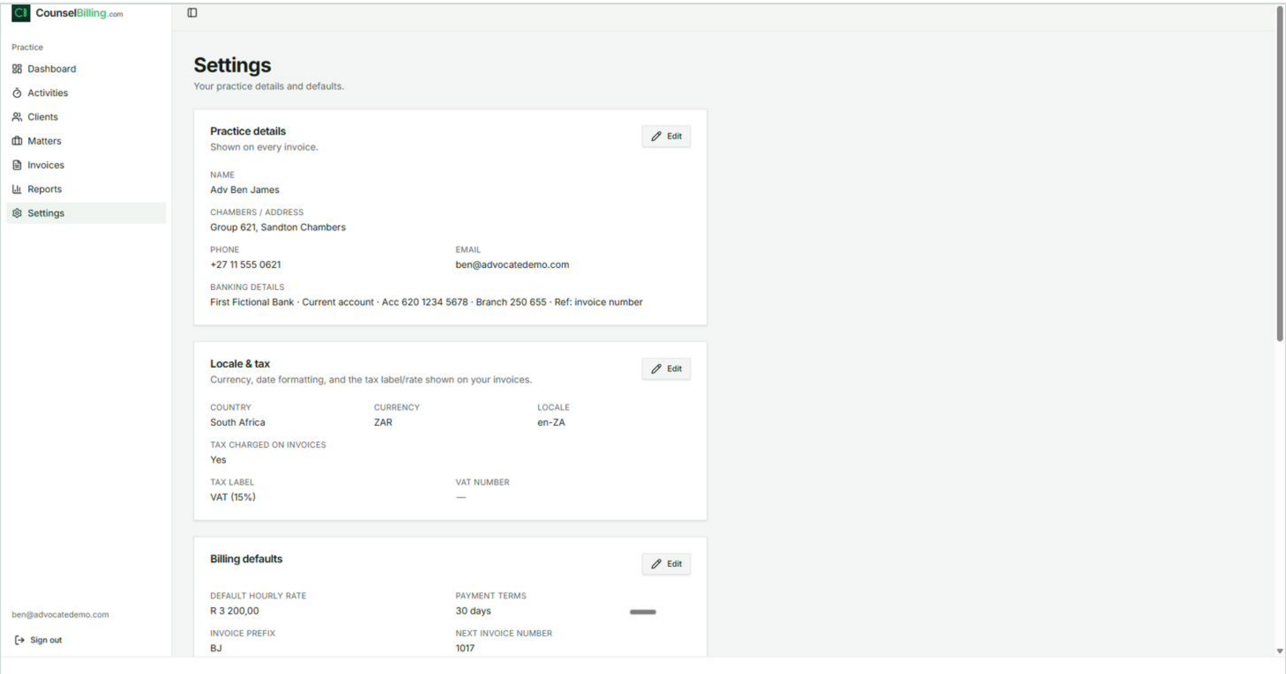


Fig 9.1 — The invoice register: every fee note with its total, amount paid, and status.

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.

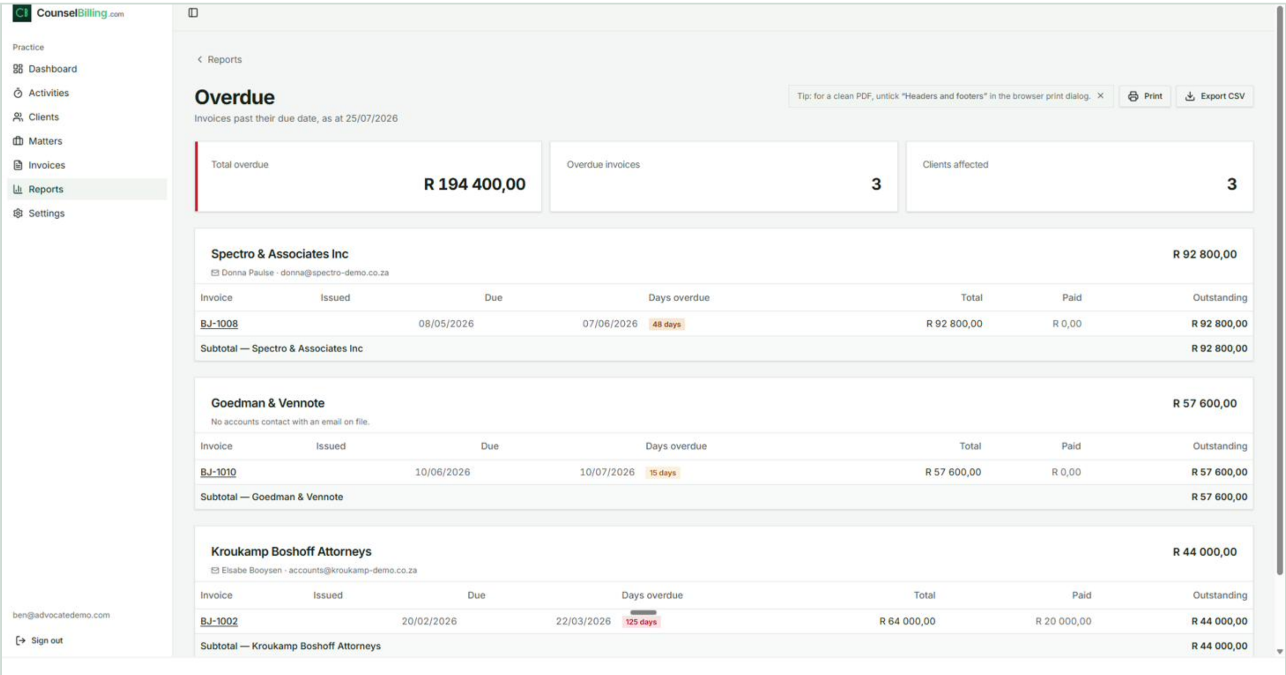


Fig 9.2 — An approved invoice with its action bar: print, download, send, record payment, or void.

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.

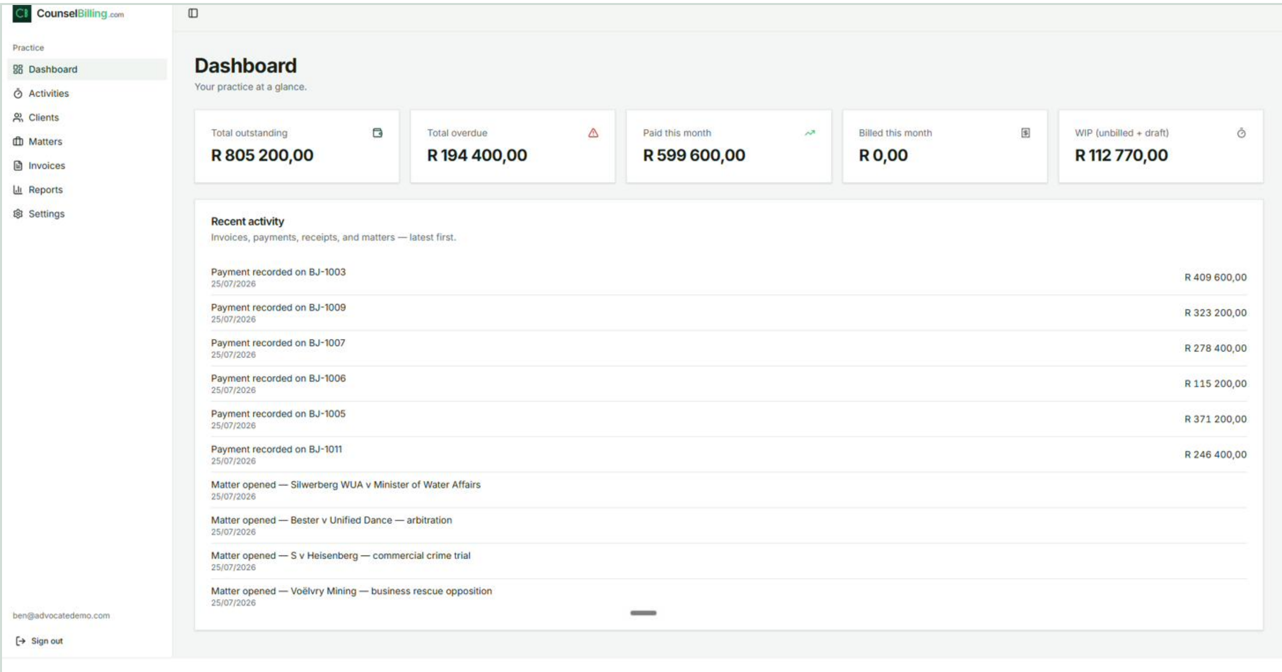


Fig 11.1 — The Dashboard: outstanding, overdue, paid, billed, and WIP — plus the practice's recent activity.

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).

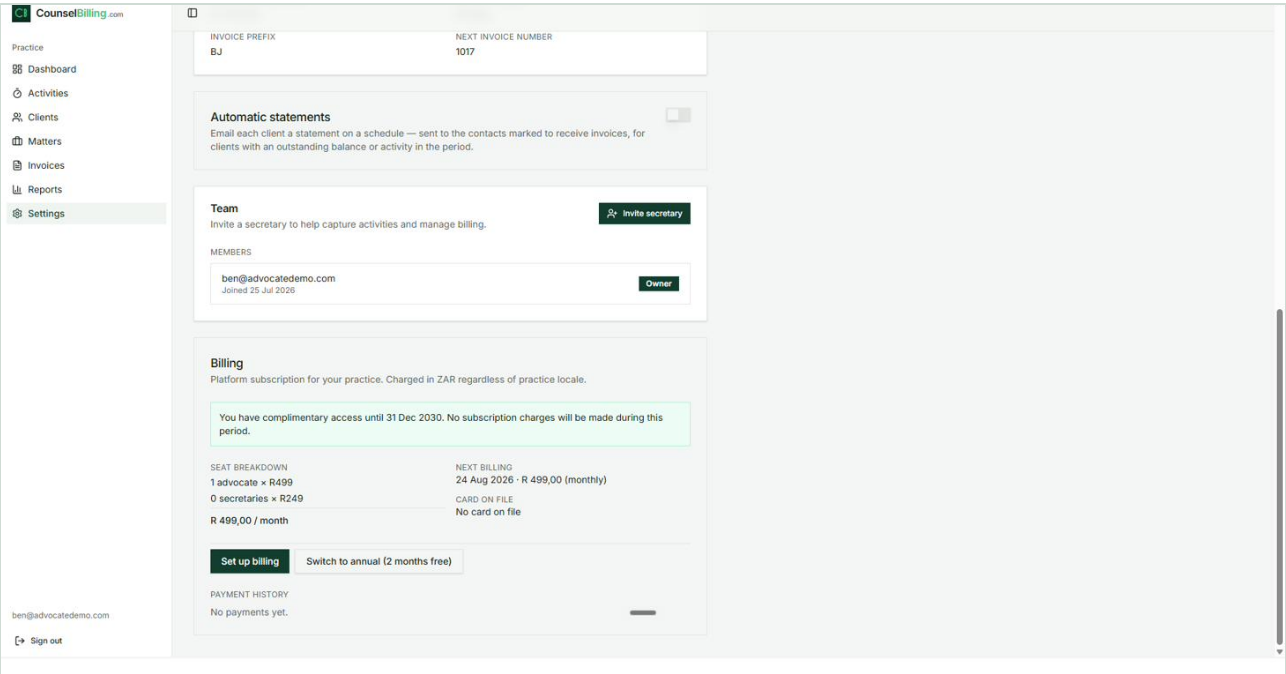


Fig 12.1 — The Reports hub: age analysis, client statements, payments received, and overdue follow-up.

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.

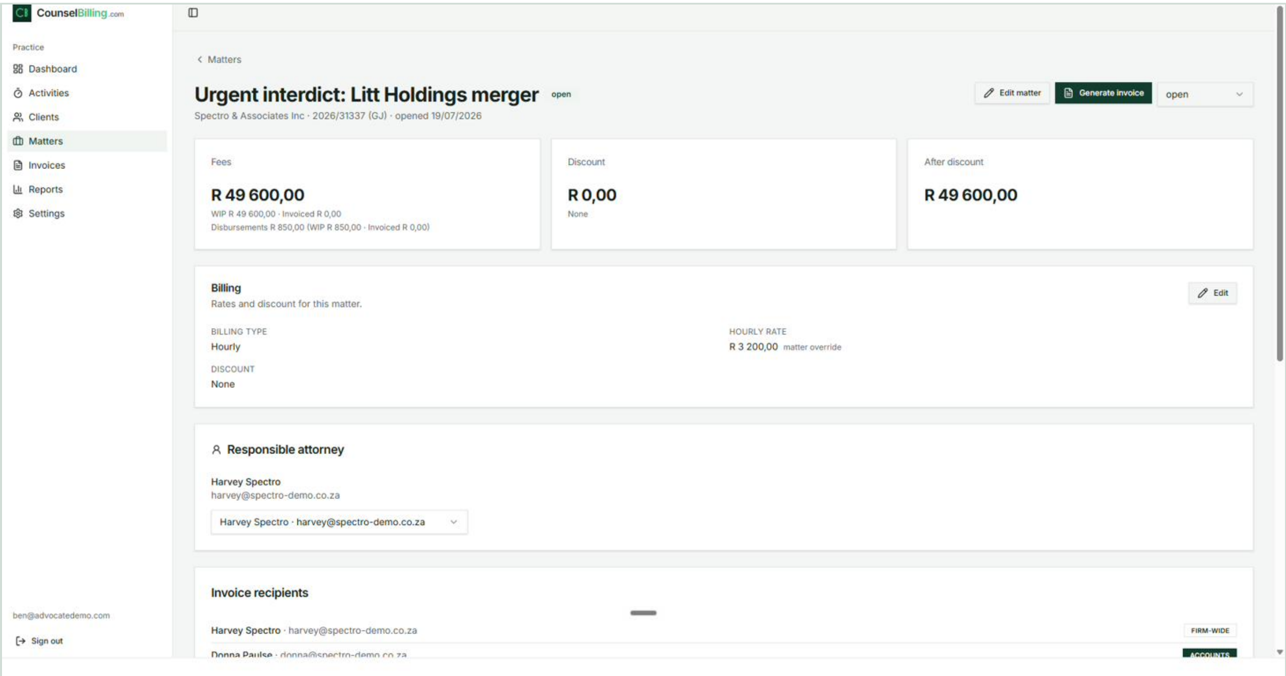


Fig 12.2 — Age analysis: the whole book bucketed by age, per client.

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.

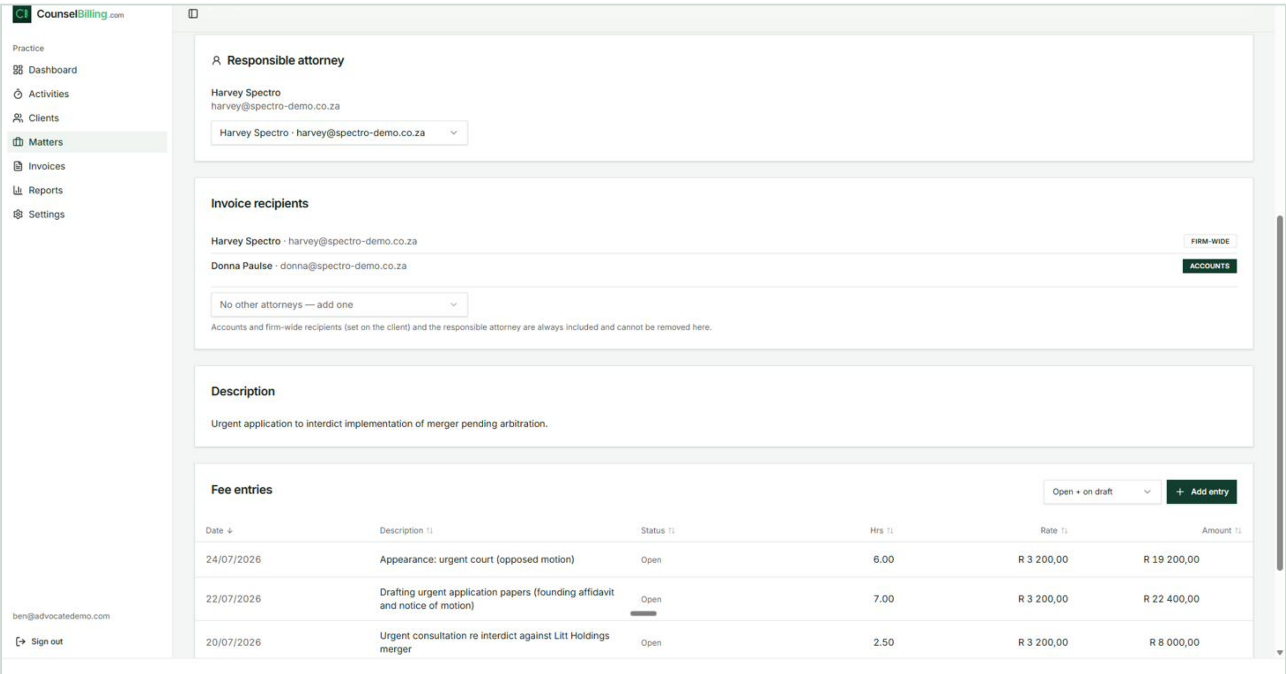


Fig 12.3 — A client statement: invoices, payments, running balance, and age analysis for the period.

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.

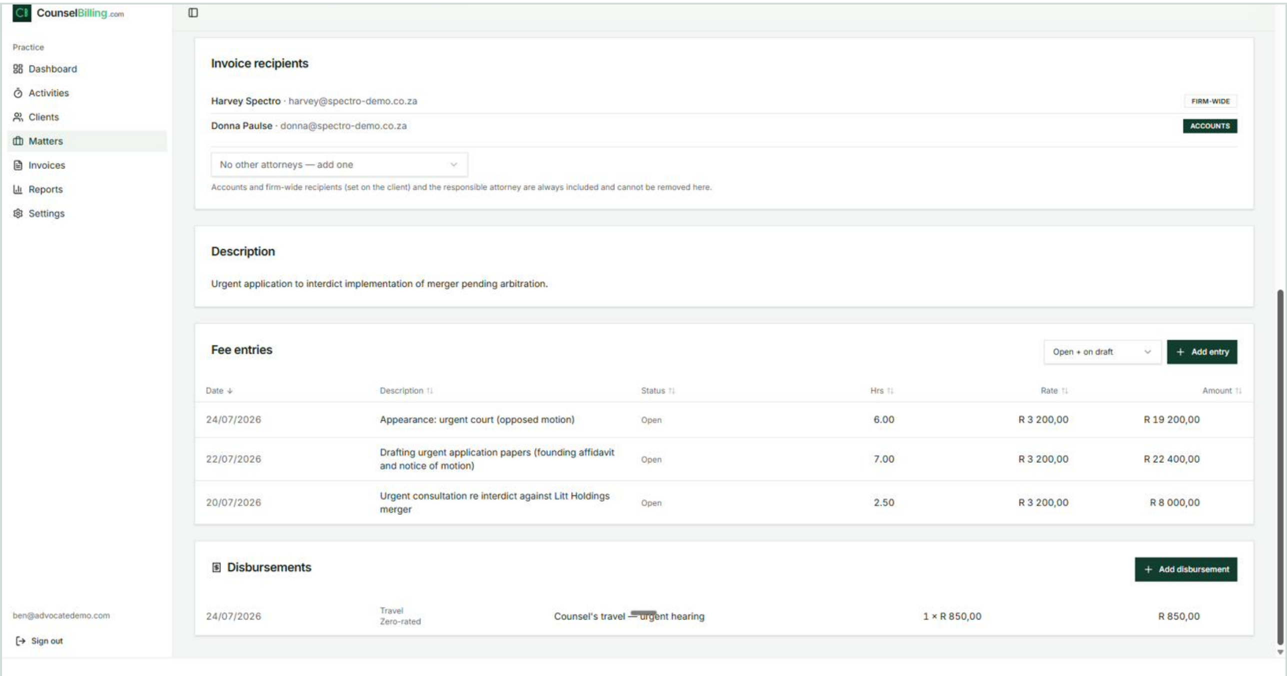


Fig 12.4 — Payments received: cash-in, days-to-pay, and every payment with its bank reference.

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.

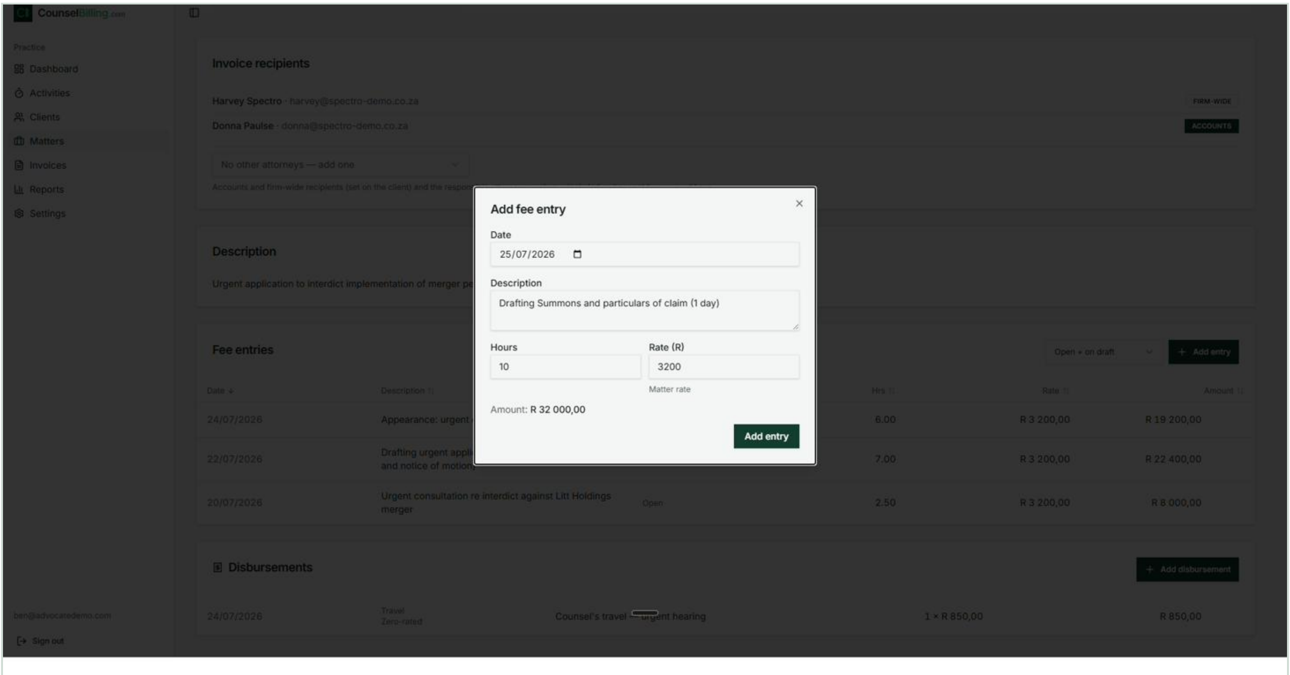


Fig 12.5 — Overdue: who owes what, how late it is, and exactly whom to email about it.

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.

CounselBilling — Everything you need to run your billing. Nothing you don't.