# Fee Earner in GhostPractice



GhostPractice offers several user-friendly modules ideally configured for Fee Earners in the practice. Fee Earners are defined as Partners; PA's; Secretaries)

Key Modules Are:
- Legal Diary
- Fees and File Notes
- Document Management
- Convert (Unbilled to Invoices)
- Template Manager
- Reports

Should you wish to see more of this exciting product, please contact Matthew Spagnoletti on 082 568 4738 for an obligation free demonstration.
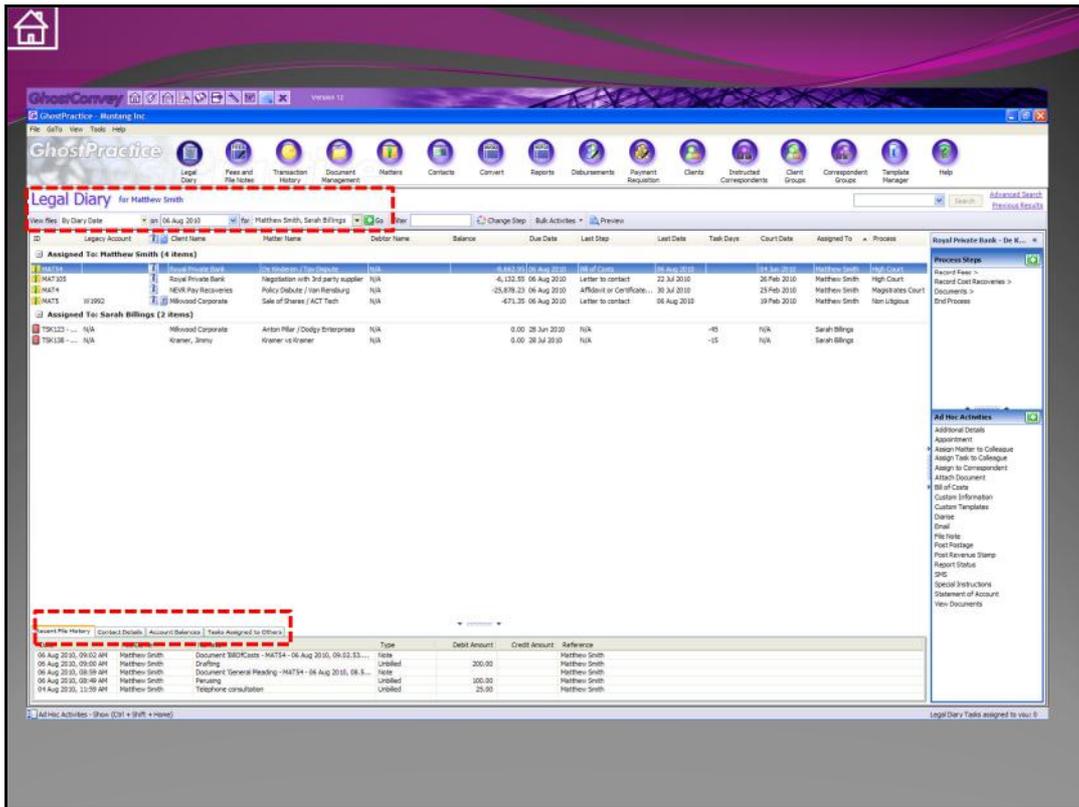
## The Legal Diary

The legal diary is much like a large electronic filing cabinet. Here I am asking the system to display matters which are assigned to Matthew Smith and Sarah Billings, for a particular date. When I select a particular matter, I will have all information relating to that matter either displayed on the screen or just one click away!

GhostPractice is a matter centric system. As you deal with a particular matter, so you are able to easily access all aspects relating to the client or matter:

•Apart from all the information readily available in the various columns of the diary screen, there are also tabs along the bottom part of the screen:

- Recent File History – shows you the last 5 transactions that have happened on the matter (for more detail you merely right click on the tab)
- Contact Details – this gives you all contacts that have been specifically linked to the current selected matter. You can access these contacts or add new ones at the click of a button.
- Account Balances – up to date balances on the matter (including the important Unbilled Fee Balance. All fees are raised as Unbilled until a TAX Invoice is produced).
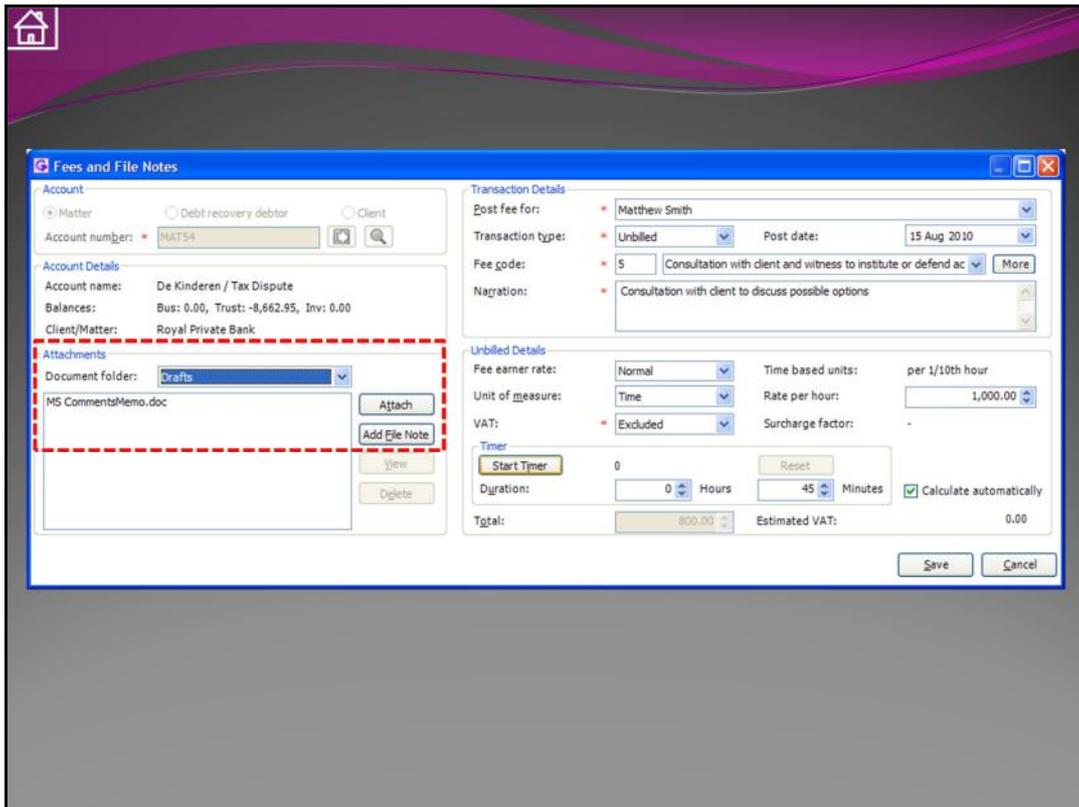
**Fees and File Notes:**

When you record a fee in GhostPractice, the fee dialogue will make recording that fee very simple:

• The fee rate has already been established and set up when the matter was opened.
• All the user need do is record the time spent and type in a short note for fee billing purposes.
• If minutes of the consultation/meeting were taken, these can be typed up by the secretary and attached (as demonstrated on the left portion of the screen shot).
• The fee amount is calculated automatically according to the settings on the matter; the fee earner's particular rate settings and the amount of time entered. Naturally the amount calculated can be over-ridden.
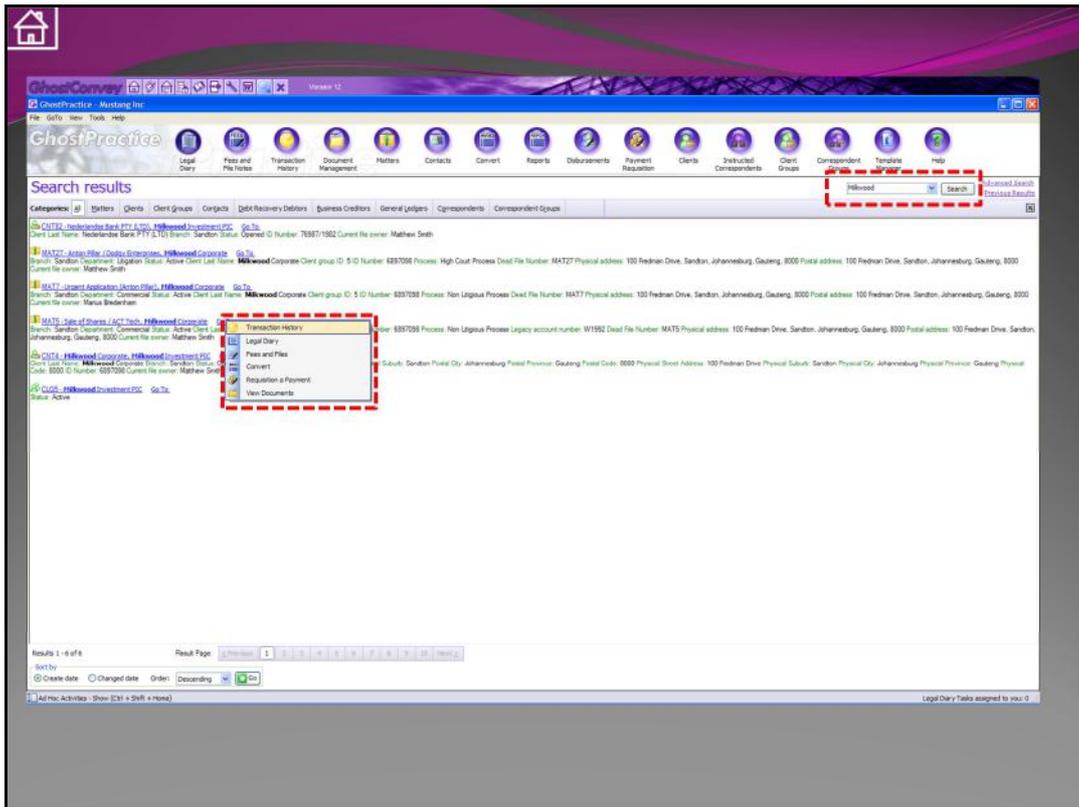
If you are responding to an incoming call or query from a client, there is a powerful search engine at your disposal:

•Type in part of the clients name; a reference number or matter description and the system will provide you with categorised matches for your search.
•Summary information is displayed so that you can easily identify the matter you are looking for.
•Once you have the matter, you just right click for a number of practical options (a common one would be the "Transaction History", which would give you the detailed history of everything that ever happened on that particular matter).
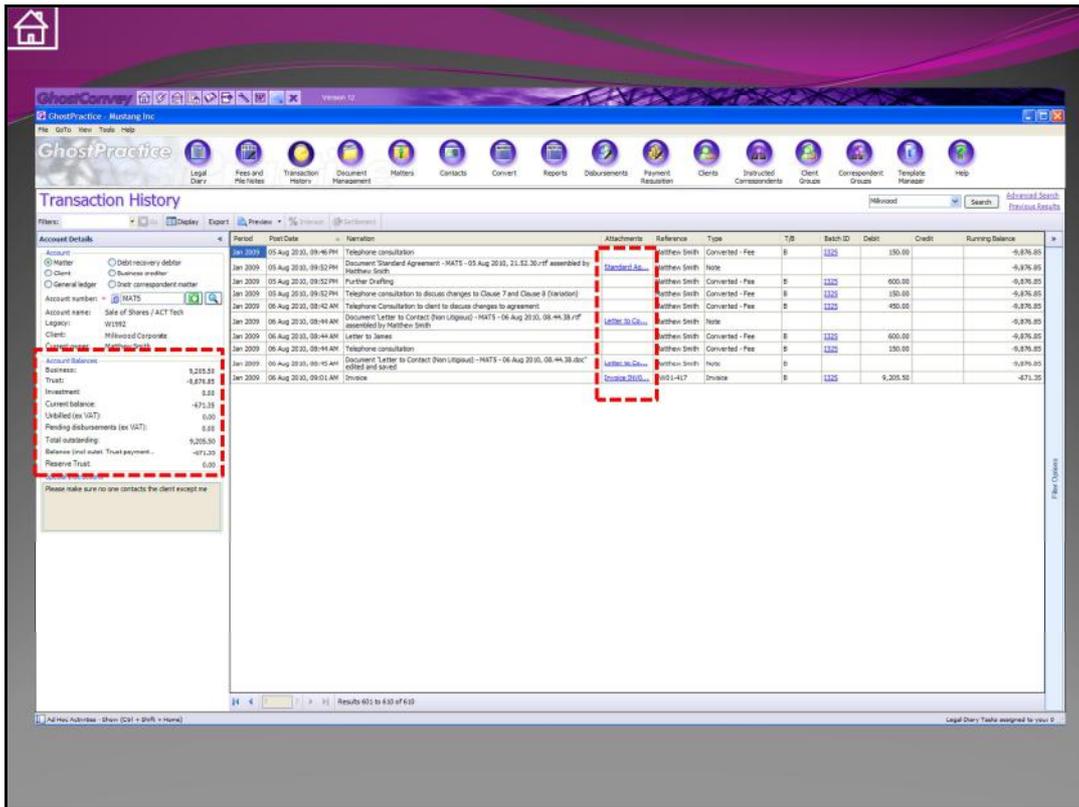
## Transaction History

The transaction history gives you a complete picture of everything that has happened on the matter:

• On the left hand side you have a complete summary of all balances on the account.
• The rest of the screen gives you each detailed transaction on the matter, complete with:
- • Financial period in which the transaction was posted
- • The date on which the transaction occurred
- • Detail relating to the transaction (what was discussed; produced; edited etc)
- • Hyper linked documents; emails; images etc (any such document is accessed by clicking on the blue hyper link)
- • The transaction type and amount are displayed on the right
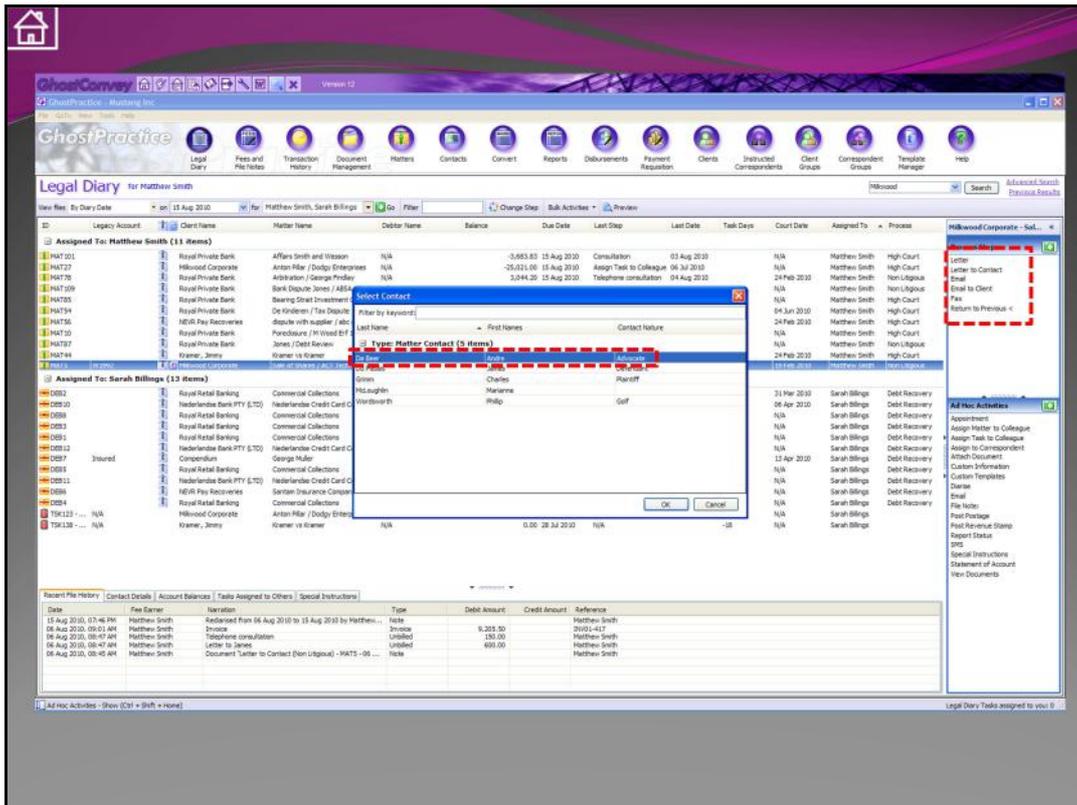
**Letters and Emails**

Both Microsoft Word and Microsoft Outlook are fully integrated into GhostPractice:

•As you select to do a letter, the system will pop up all contacts from the "Centralised Contact Manager" (built into GhostPractice) so that you can select the recipient of the letter.
•These details will then be merged into a Word letter document (complete with the latest letterhead of the firm).
•Once the document is completed, the system will prompt the user to enter a fee.
•The user will also have the option of saving the letter in an appropriate folder within the matter.
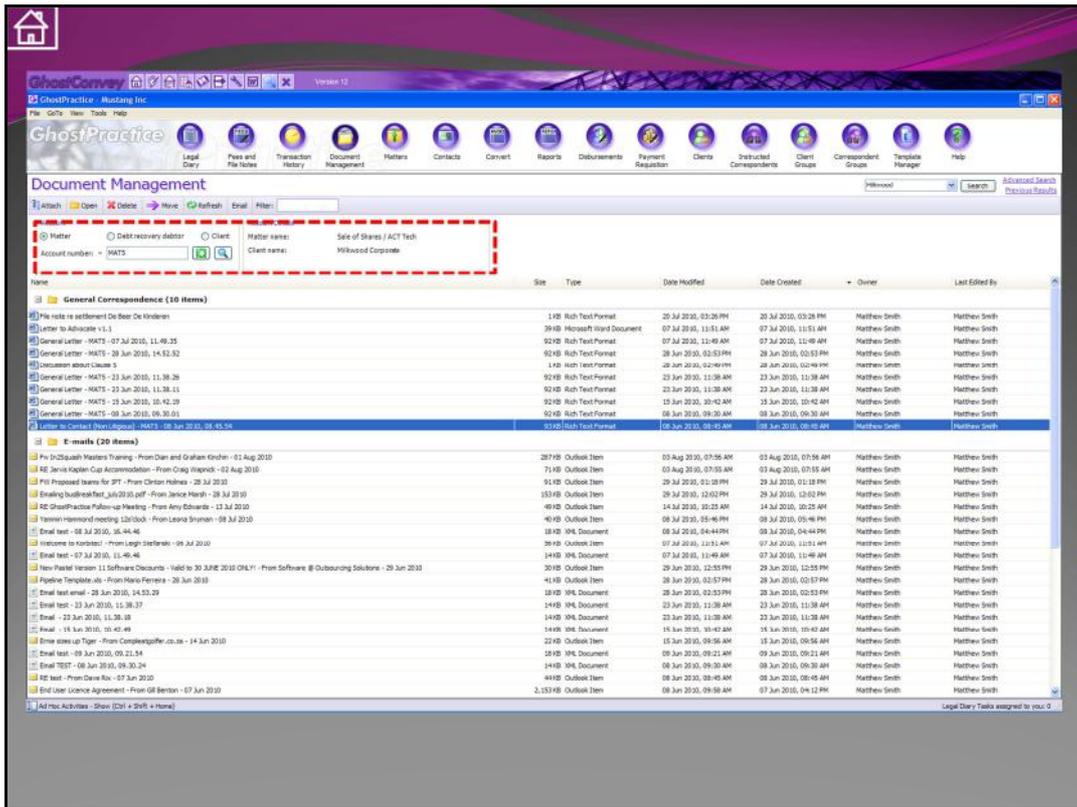
**Document Management**

As users work with all files on an electronic basis, GhostPractice gives your firm a practical way to create an electronic filing system for all matters.

On a particular matter, you can access all documents that relate to that matter at the click of one button (no matter where you are in the application):

•All documents are categorised into different folders. These "folders" are named according to each departments requirements.
•You can see who first saved or generated the document; who last edited the document etc.
•If you cannot easily find the document you are looking for; there is a powerful filter which will assist you in easily finding obscure emails or letters on any given matter.
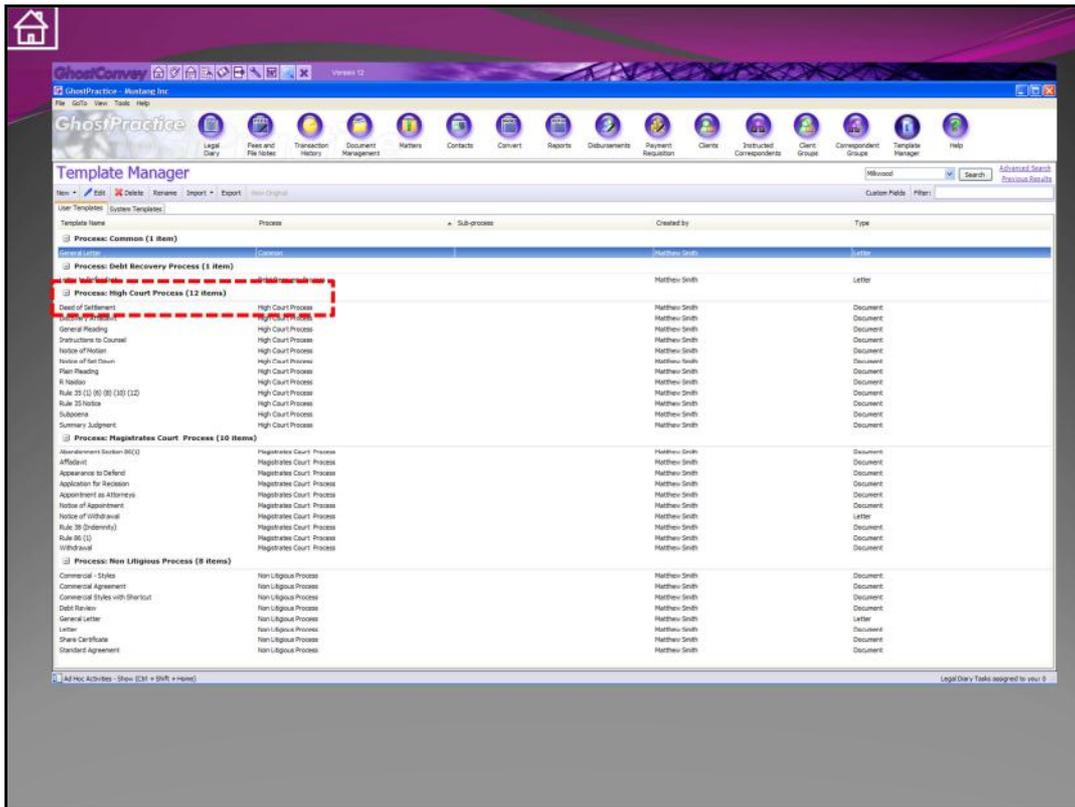
**Template Manager**

GhostPractice incorporates a fantastic document management system, but it also has a powerful next generation document automation and production system.

Template Manager allows you to:

•Incorporate all standard documents that your practice has built up over years of practice.
•Have database variables from the GhostPractice database merge into the documents you have used for years in your various practice areas.
•If a letterhead is appropriate this would be inserted. This also means that you only have to keep one letterhead template up to date for the entire practice.
•Once you have incorporated one of your templates, the user just selects the "Custom Template" off the list of documents that have been added and GhostPractice will:
   • Merge the variables from the matter database into a completed Word document.
   • Prompt the user to enter an appropriate fee.
   • Prompt the user to save the document into an appropriate folder within the matter.
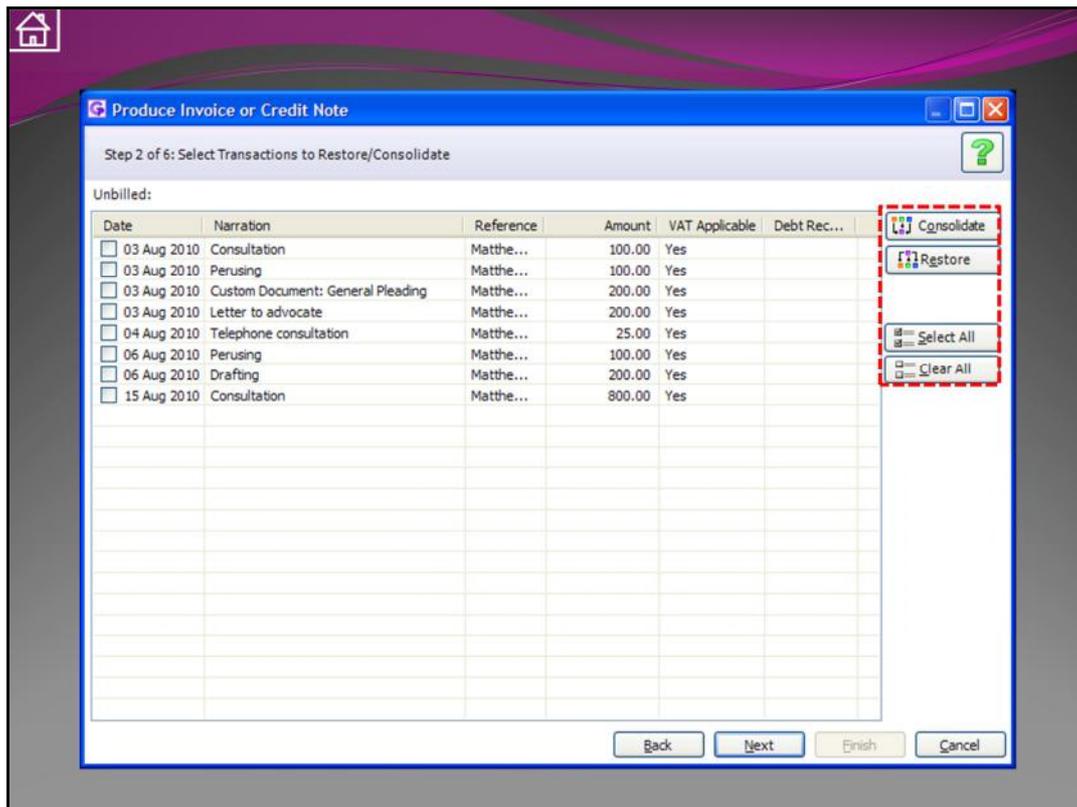
### Invoicing

With GhostPractice making it so simple to record what each user is doing, it is important to have a method of easily creating invoices for all work completed.

Invoices can be created automatically via the system or created on demand by the secretary or partner:

•All transactions that are currently unbilled for the matter are displayed.
•These transactions can be consolidated; edited or removed at this point as they are still Unbilled and not yet "financial transactions".
•Once the user has finished editing the unbilled transactions; the system will create either a "Pro Forma Invoice" or an "Invoice" as the case may be.
•As this is processed, so the General Ledger accounts will be updated automatically. The system is truly real time.
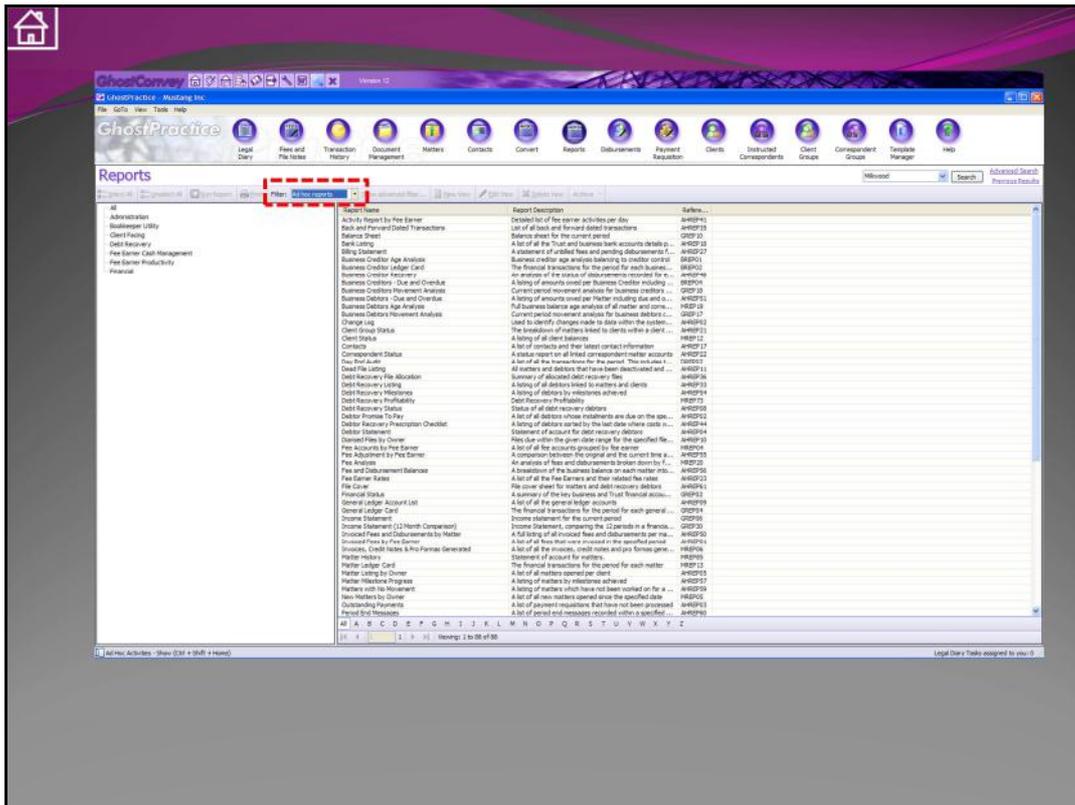
## Reporting

The whole point of having everyone account for their time, is being able to account for that and report on it relative to the correct functioning of the business.

•There are 125 standard "Ad-Hoc" reports available to give you a real time snap-shot of the business at that point in time.
•There are numerous standard reports that will generate at month-end as "Stored Reports'.
•There is a query tool which allows you to create your own reports which can be stored as "Views".

The reporting aspects of GhostPractice give you the power to run your business with total knowledge and confidence. You will be able to account for every person in the business and use that information to make strategic decisions about your business.