

## TIME AND BILLING FACT SHEET

### KEEPING YOU ON TRACK

Run your firm at peak efficiency with Thomson Reuters Onvio Time and Billing. Its centralized database and real-time synchronization ensure that you and your staff are always on the same page—no matter where, when or how you're working—while its fast setup and intuitive interface make it simple to enter time and expenses, create invoices, track receipts and report on your firm.

#### Time and Expense Entry

- Record billable, non-billable and administrative expenses and time worked
- Review time and expense entries for all staff in a centralized screen and export to Microsoft® Excel® for analysis
- Use one or more timers to capture time as it happens anywhere in Onvio
- Assign multiple billing rates to a single staff member
- Select from two input screen views— one form-based, providing onscreen reporting of time and expenses entered, the other a grid-style entry allowing for the traditional timesheet view of work completed
- Add comments or notes for the biller with convenient comment fields that are available within each entry
- Enable an approval and posting process for your firm as needed for time and expense entry

#### Billing

- Bill clients at your convenience as often as you choose, by any method you prefer
- View WIP amounts available to bill—subtotaled by project, engagement or at the client level—and export to Excel for analysis
- View a list of all saved invoices with the flexibility to edit and make changes as needed
- Review time and receivables quickly with onscreen reporting by day, week, month or custom date range
- Use the Quick Bill feature to bill multiple time and expense entries at one time with automatic allocation of billing and adjustment amounts
- Create progress billing so client invoices can be generated for the work before time and expenses are entered
- Choose from multiple invoice formats that can be defaulted to the client and selected while creating
- Enable an approval and posting process for your firm as needed for billing

#### Receipt & Adjustments

- Enter receipts and apply them manually to outstanding balances
- Enter different adjustment types, including credit memo, debit memo and write-offs
- Send statements to clients showing the status of their accounts
- Enable an approval and posting process for your firm as needed for receipt and adjustment entry

#### Reporting

- Access the data you need to make impactful business decisions to move your firm forward with our firm management reports:
  - Work in Process Summary
  - Billing Analysis
  - Production Analysis
  - Receipt and Adjustment Journal

### DISCOVER ONVIO TIME AND BILLING

See for yourself how Onvio Time and Billing can help move your firm forward into a connected and profitable future. Visit [DTMax.ca/en/Onvio/Time-and-Billing](https://DTMax.ca/en/Onvio/Time-and-Billing), or call **1 866 653-8629** to speak with a representative.

Thomson Reuters Onvio. *Connections that move you forward.*  
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