BarBooks
An accounting package created by barristers for barristers

Icon guide

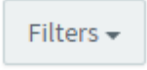| Icon	Action
➕	To add something new, a matter, a file, and other documents
🗑	To delete an action
🔽	To archive a matter or report
🔼	To unarchive a matter or report
🕐	The timer functionality
🔍	To search within BarBooks
🔄	To refresh the amount of Unbilled work and Invoices
⇄	To transfer a task to another matter
Filters ▾	Filter
💬 We are live! Chat with us	BarBooks live chat.
👤	To view your account preference and rates
Unbilled Work incl. $2,750.00 Invoices Outstanding incl. $8,300.00 Total incl. $16,050.00	Overview of the Matter totals
📄	Shortcut button to generate the Statement of Outstanding fees
🗐	To duplicate an expense
➕	Quick action button, enables you to create task, start timer immediately, and view the list of Timers wherever page you are in.
☰	List of Timers button
⅄	Indicates that the expense was splitted

SETTING UP YOUR ACCOUNT

1. Create your Profile

Your profile is set when you very first set up and download BarBooks. It's important that you fully complete this. These details are pulled into all templates that sit within BarBooks. You can edit any of your default details by selecting 'preferences'.

2. Set up your default rates

You can edit any of your default details by selecting 'preferences', rates. Below are the set of default rates we start you up with. You can edit any elements of these rates. They calculate GST either way automatically for you. Once complete click the green tick to save your changes. If a rate does not apply to your practice you can delete by clicking the red x next to the rate.

You can choose how many minutes your timer will round up. Or you may also choose not to round the timer. Also found in the Matter details box. (NEW!)

3. Task Description

You can also add tasks description in this tab which you can use in creating a task in a Matter.

4. Avatar

Import a photo from your computer to create an avatar. Select Avatar, and then choose from file. Once uploaded, you can move the cursor and expand your selection of the photo by dragging on the arrows

IMPORTING YOUR DATA FROM ANOTHER PROVIDER

Please email admin@barbooksaustralia.com with your current provider and the data you wish to migrate across.

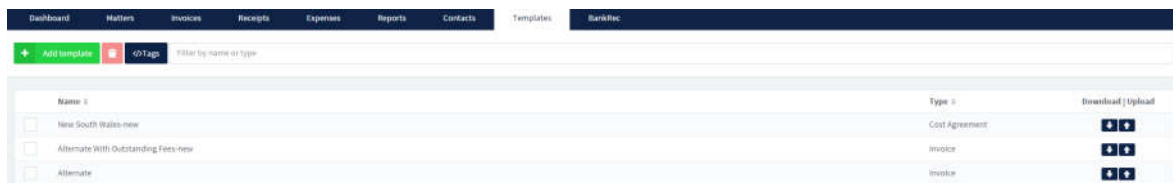**TEMPLATES**

1. Default templates

BarBooks automatically supplies you with a number of templates that are fully compliant with regulations set by the bar. You can edit or customise any of these templates as you wish, or create your own.

2. Creating a new template (recommended if you have added new rates or renamed existing rates.

To create a new template, go to the "Templates" section and simply press the green "+" on the bottom left. Then you can choose one of the default templates as a starting point or import your own .docx template. After adding your template, you can amend the name and the type of the template, so that it is available in the correct part of BarBooks.

3. Editing a template

To edit a template, go to the "Templates" section. You will need to download the template to make your changes and then upload when you are happy with the changes made. To download the template, select the down facing arrow on the template you wish to edit. This is a word document, so you can edit just as you would when creating a document.

4. Inserting Tags

To insert Tags, press "</Tags>" window, which will open a small window with all the tags available to pull in matter specific information or your personal detail. In this editor you can set the type of template you want the Tags for and copy or insert tags directly from the window into word. When you have chosen your Tag, you can simply press "Copy" and then paste it into the document. When you are finished, simply save the word document and then select the upward facing arrow to upload back into BarBooks. Select the saved document within the file finder. The changes will then be applied to BarBooks.
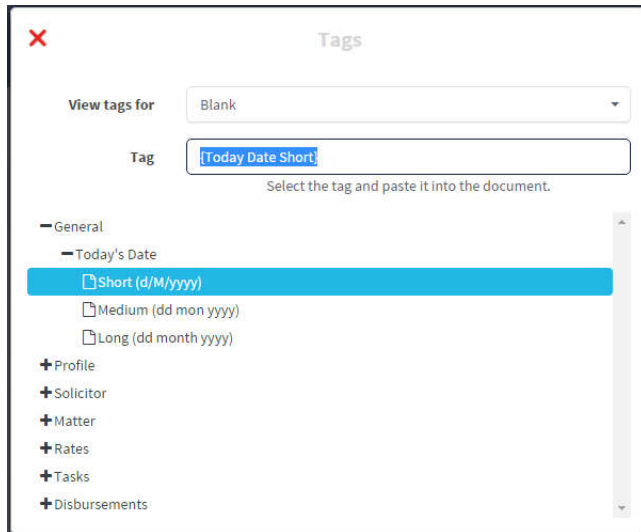
5. Adding a digital signature

If you do not have a digital signature we can help create one for you. Simply sign a blank piece of paper. It needs to be plain with no text on the back of the paper. Then take a photo and email to admin@barbooksaustralia.com/ jewel@barbooksaustralia.com. We will create an image file for you.

6. Importing existing templates

Send your existing templates to the BarBooks team and we will recreate and assist you in uploading the templates. Email to admin@barbooksaustralia.com/jewel@barbooksaustralia.com.

MATTER

1. Creating a Matter

To add a matter, just go to the matters tab and click the Add button. Fill out all the information needed in the details and rates tab.

You can also set up the rate for a Fixed Fee (NEW!). Once you entered a Fixed fee, it will automatically have a note in the Matter box that it is a Fixed Fee.

2. Adding a Solicitor within a matter

To add solicitor within a Matter just click the down arrow button and select from the list. You may also click the Add button to input a new Solicitor/Firm not included in the list.

3. Archiving and Un-Archiving a Matter

To archive a matter, just select a matter and click the Archive button beside the filter button. To Un-archive a matter, just filter the list of the Matter to Archived then select an archived matter and click the Unarchive button.
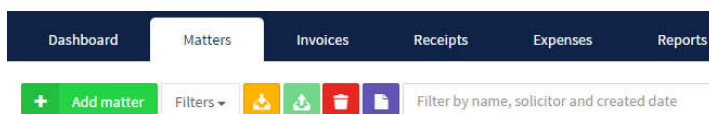
4. Deleting a Matter

To delete a matter, you must delete first the tasks, invoices, or any work containing it. You cannot delete a matter if there's work in it. Once you have deleted all the works, just click on that matter and click the Red trash bin (Delete) button.

5. Adding a Task

To add a task, you just need to go to Matters tab, select a Matter, then click the Add task button. Fill in all the required details. To add a discount on the Task, just click the box beside the Discount.

6. Generating a Statement of Outstanding Fees

You can easily generate a Statement of outstanding fees by just clicking the SOF button. It will then let you choose a template for it and the document will be automatically downloaded in your computer.

7. Adding a Disbursement

To add a disbursement, just select the matter that you want to apply a disbursement against. Select the "Disbursements" tab inside the matter file and click on "Add disbursement" button. Add the required information to the disbursement
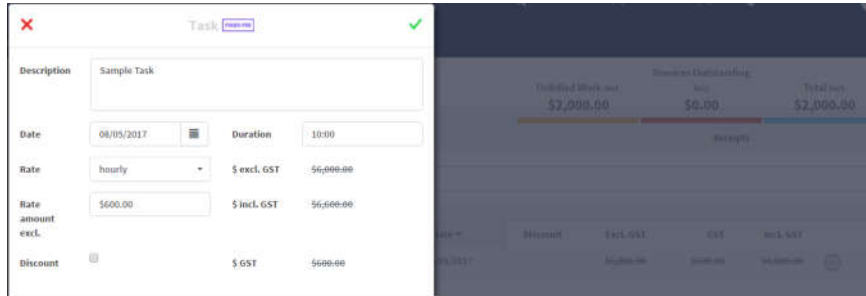

8. Adding a Fixed Fee (NEW!)

To add a Fixed fee, you need to include a fee on the Fixed fee tab when setting up your matter. Once you entered a fee, it will automatically have a note on the Matter details box that it is a Fixed Fee.

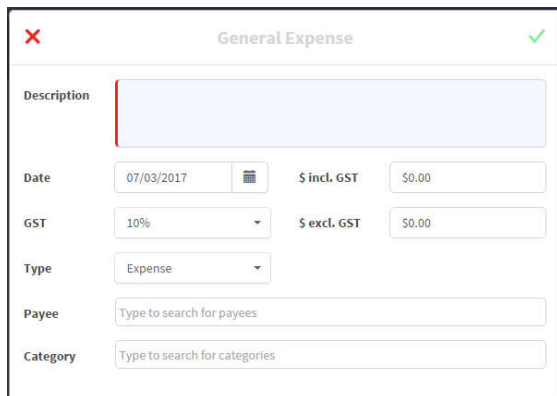Even if you add a time duration for an hourly rate or changed your rate, it will still have a Fixed fee.

A new template for Fixed fee is added in the Templates tab (NEW!)

EXPENSES

1. Adding an expense

To add an expense, just go to the Expense tab, click the Add button then choose the type of expense. It can be a General Expense, Tax Payment, or Personal Expense. Once you have selected the type of expense you may now add the expense details as required.


2. Duplicate an expense

To duplicate an expense, just click on the expense that you would want to duplicate then click the Duplicate button beside the delete button. The expense details box will appear and you can now make some changes on it then save.

INVOICES

1. Creating an Invoice

Once you have added tasks and disbursements you can now invoice. Just go to the Invoice tab, click the Add invoice button then select a Matter. The invoice will be auto generated pulling in any un-invoiced tasks/time and disbursements. You can unselect any tasks by unticking them from the itemisation. Add disbursements and discounts if necessary. Select a template for your

invoice and click the check button then your invoice will be automatically downloaded to your computer.
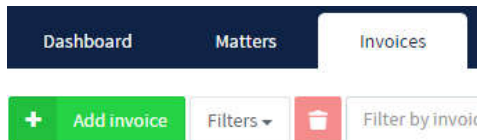
2. Recording a Payment

To record a payment, select "Paid" button on the particular invoice. Select the type of payment that you would want to apply. To write off an Invoice, select "write-off" and apply an amount.

RECEIPT

1. Creating a Receipt

Receipts are automatically created when an invoice has been generated and a payment has been made. Receipts are grouped under each matter and can be found in date order under the receipts tab.

2. Adding a Tax refund

Select the receipts tab and click on the add receipt button. Pick to add a tax refund. Enter the description and amount then save.

3. Adding a general receipt – payments from other businesses, work, rental property etc. Select the receipts tab and click on the add receipt button. Pick to add a general receipt. Enter the description and amount then save.

REPORTS

1. Generating a report

Click the reports tab on the top of the page. Previously created reports will be listed below. To review these, just click the file and the report will be downloaded. To create a report just select the Add button then choose from the list of reports, select the date frame and then save.

CONTACTS

1. Adding a contact

Go to the Contacts tab then click the Add contact button. You may add a Solicitor or Firm contact. Just enter all the needed details.

TIMER

1. Rounding

You can set up the rounding of the Timer in the Matter details. Just click the timer button beside a task and it will start running. A Timer will also be shown at the top right of the screen. The Timer will round up once you click the stop button

2. List of Timers

You can see the List of timers by clicking the Quick action button then select the List of Timers. Or you can also move your mouse over the Timer at the top right of the screen, then click the List of Timers button
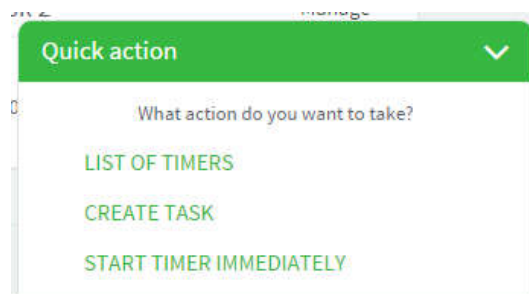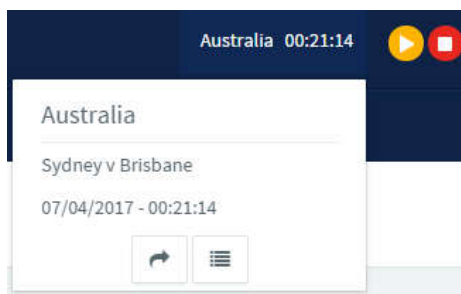
3. Active Task

This will show you the task which you can see also at the top right of the screen. You can manage the task by editing, deleting, and opening the Matter (if it is already linked in a Matter)
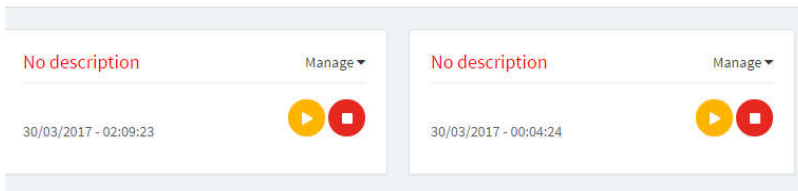
Active task

Australia   Manage ▼

Sydney v Brisbane   Edit

07/04/2017 - 00:21:40   Delete

Open matter
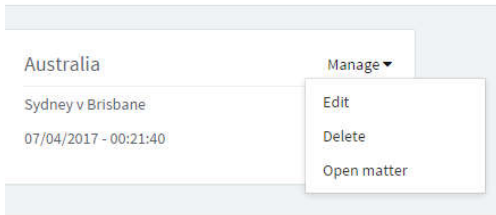
4. Incomplete Task

This corner will show you the list of tasks with partial details. These are tasks not yet linked in a Matter.

Incomplete tasks
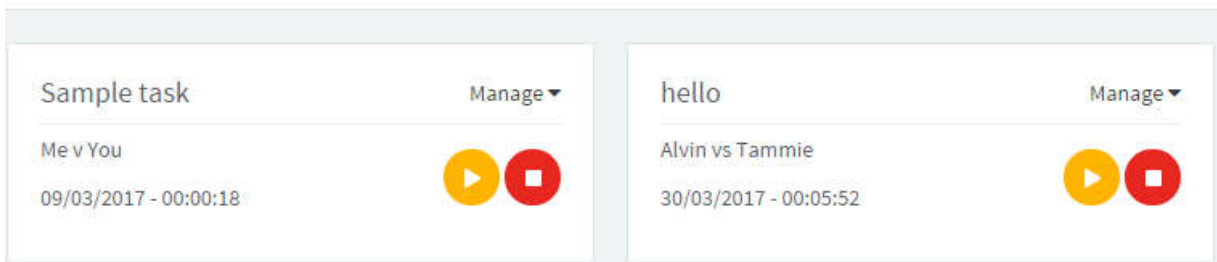
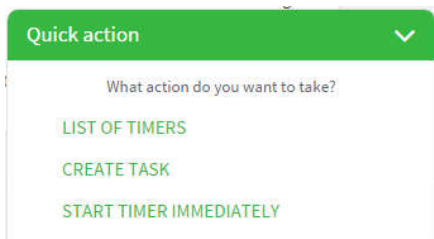| No description	Manage ▼	No description	Manage ▼
30/03/2017 - 02:09:23	▶ ■	30/03/2017 - 00:04:24	▶ ■

5. Paused Tasks

This corner will show you the list of Paused tasks. If you click the stop button of a certain task, it will then be removed in this list.
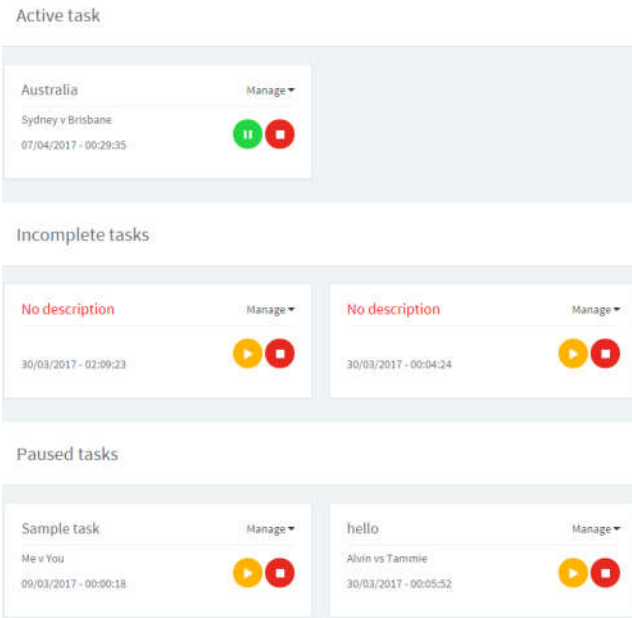
Paused tasks

Sample task	Manage ▼	hello	Manage ▼
Me v You		Alvin vs Tammie	
09/03/2017 - 00:00:18	▶ ■	30/03/2017 - 00:05:52	▶ ■

QUICK ACTION

Quick action ⌄

What action do you want to take?

LIST OF TIMERS

CREATE TASK

START TIMER IMMEDIATELY

1. List of Timers

It will direct you to a page that contains the Active Task, Incomplete Tasks, and Paused Tasks.

2. Create Task

This button will enable you to create a task even when you are not in the Matters page. Just select a Matter, then enter all the required details.

3. Start Timer Immediately

Upon selecting this button, the timer will start already even while you are entering the details. You can also enter the details later and it will be in the Active Task and can also be found in the Incomplete task if the matter is not yet linked to it. Note that only active matters with hourly rate can be selected.