

Osprey Approach: Deferred Time

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The latest version is always online at
<https://support.ospreyapproach.com/?p=57074>

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This guide will explain the Defer Time Ticking option available during the billing process.

You will also see how to deal with bills that have been produced using this option.

We would recommend you do this process on a regular basis or at Month end you may see a message in Financial Periods.

Current Year: 4. Year Start: 01/10/2023. Year End 30/09/2024

Current Period: 5 of 12

Current Period Dates: 01/02/2024 to 29/02/2024

Current Posting Date : 26/02/2024

There are outstanding postings scheduled for this period.

There are deferred Bills awaiting ticking.

What is deferred time?


Osprey allows you to allocate time to a bill after the bill has been produced. This may be necessary if all of the time to go on the bill has not yet been posted, or at the time of billing you are unsure what time to allocate to a bill.

This facility is found on the billing screen.


Bill - Work - Microsoft Edge

https://mitzibroom.ospreyapproach.com/main/PostingCliLdgBill.aspx?area=50...

BILL - POSTING DETAILS

Posting Date: 26/02/2024 


Detail:

Fee Earner: Mitzi Broom 

Fee Earner Costs:

Vatable Disbs: Enter amount excluding Vat

Disbs (Agency):

Vat:  Calculate Vat

Total Invoice: 0.00


Reference: #NEXT#

Other EC member: ☐

Spool For Printing: ☐

Defer time ticking: ☐

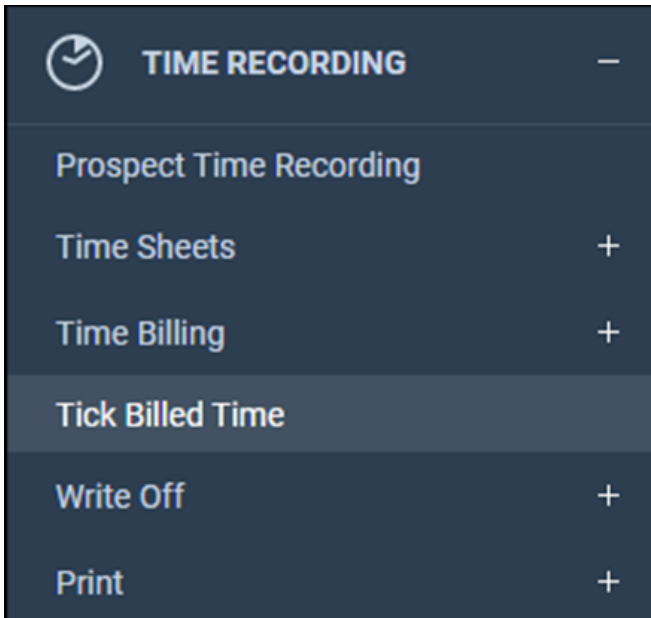
Show Apportion Costs: ☒

 Next

When a bill is produced with this option enabled you do not have to select what time to allocate to the bill during the billing process, and the bill will then appear in a list where it can be selected so that you can tick the time for the bill at a later date.

Where to find deferred time bills

The list of bills with Deferred Time can be found from Time > Tick Billed Time.



How to allocate time to a bill

When you click on Tick Billed Time option a screen will open with the list of bills that have been produced using the Defer Time Ticking option.

Time Recording

Tick Billed Time

Export

Search...

CLIENT NO	MATTER NO	BILL DATE	BILL NO	COSTS	USER	TICK	REMOVE
123456	2	19/04/2022	2247	771.00	MO	✓	
A00021	3	03/04/2021	1875	0.00	matthw	✓	
ALB00002	1	01/06/2021	1897	100.00	tomg	✓	
800001	1	01/05/2020	1741	300.00	mitzi	✓	
800001	14	01/12/2019	000193	1,500.00	mitzi	✓	
800001	2	28/02/2020	1703	9,000.00	mitzi	✓	
800001	22	27/07/2020	1751	1,800.00	mitzi	✓	
800001	1	01/05/2020	b2007	300.00	mitzi	✓	
800001	1	01/05/2020	b2007	300.00	mitzi	✓	
800001	4	01/10/2018	ECBILL	1,500.00	mitzi	✓	

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Page size: 10

Select the bill that you want to allocate time to by clicking on the Tick in the row showing that bill.

A new screen will open where you can now select the time you wish to allocate.

Time Recording > Tick Billed Time > Allocate WIP to Bill (ALB00002/1)

Confirm Calculate total ticked

Wip Balance: 906.60
 Value Ticked:
 Billed Costs: 100.00
 Value Type: Show Ledger Values
 Selection Type: Manual

DATE	DESCRIPTION	ACTIVITY	F/E	REMUN	MINS	VALUE	TICKED
12/05/2021	HOUR_PER - hour	HOUR_PER	AG	STANDARD	72.00	3.60	<input type="checkbox"/>
12/05/2021	HOUR_PER - hour	HOUR_PER	AG	DANT	6.00	3.00	<input type="checkbox"/>
13/05/2021	TESTTT	STANLETT	MP	STANDARD	0.00	0.00	<input type="checkbox"/>
13/05/2021	TESTTT	STANLETT	MP	STANDARD	0.00	0.00	<input type="checkbox"/>

you can filter the time in this list using the options under Selection Type

Selection Type: Manual

Manual

To Value

By Date

By Activity

By Fee Earner

By Remun Type

All

Defer Ticking

Deselect All

DATE	DESCRIPTION
12/05/2021	HOUR_F
12/05/2021	HOUR_PER - hour

- Manual enables the individual items to be selected.
- By date ticks all items up to a certain date.
- To value ticks all items in date order up to but not exceeding a value.
- By fee earner ticks all items for a specified fee earner.
- By rem type ticks all items for a specified remuneration type.
- All ticks all.
- Defer ticking returns to the 'Tick Billed Time' menu with no changes.
- Deselect all deselects all items ticked in this session

To select the time to allocate to this bill place a tick in the box/boxes in the Ticked column, then click the Calculate Total Ticked button at the top of the screen, the value of the time selected will be displayed just below that button.

When you are happy with the amount of time to allocate to the bill, click on confirm. The time is now allocated and the bill will be removed from the list.

If you have bills in the list that do not require any further time to be allocated you can remove them from the list by clicking the Trash Can icon in the Remove Column.