

Osprey Approach: Deferred Time - Browser

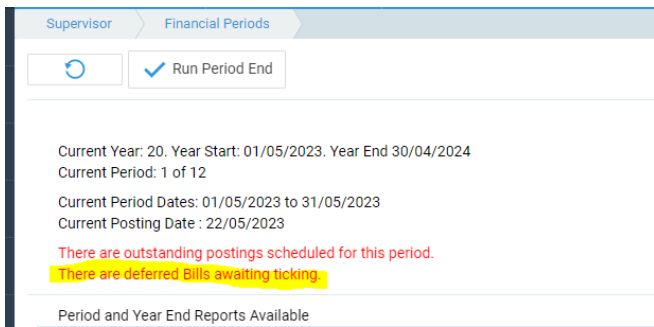
This help guide was last updated on
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The latest version is always online at
<https://support.ospreyapproach.com/?p=57074>

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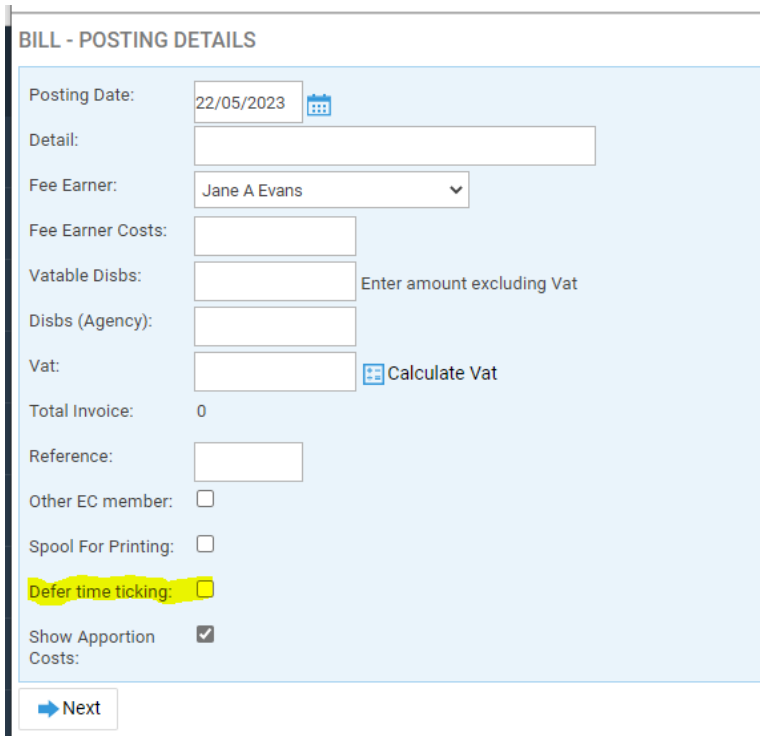
This guide will explain the Defer time ticking option during the billing process. and how to deal with bills that have been produced using this option. We would recommend you do this process on a regular basis or at Month end you may see a message in Financial Periods



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 in the billing screen



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

WORKFLOW STATUS BAR

testing
Key Dates: Date: Description: More Key Dates ▾

CLIENT & MATTER SEARCH ▾
 Client Search | Dossier Search | CRM Search | Send e

Client No: STR001 
 Matter No: 1   Load Client/M
 Name: Straton
 Matter: Default Matter

CLIENT LEDGER ▾
 Refresh b Bill

Sheet number 4 of 4 (46 postings.) Sorted by Date



1 2 3 4











DATE	DETAILS
01/05/2023	off to nom

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	<input checked="" type="checkbox"/>	
A00021	3	03/04/2021	1875	0.00	matthw	<input checked="" type="checkbox"/>	
ALB00002	1	01/06/2021	1897	100.00	tomg	<input checked="" type="checkbox"/>	
B00001	1	01/05/2020	1741	300.00	mitzi	<input checked="" type="checkbox"/>	
B00001	14	01/12/2019	000193	1,500.00	mitzi	<input checked="" type="checkbox"/>	
B00001	2	28/02/2020	1703	9,000.00	mitzi	<input checked="" type="checkbox"/>	
B00001	22	27/07/2020	1751	1,800.00	mitzi	<input checked="" type="checkbox"/>	
B00001	1	01/05/2020	b2007	300.00	mitzi	<input checked="" type="checkbox"/>	
B00001	1	01/05/2020	b2007	300.00	mitzi	<input checked="" type="checkbox"/>	
B00001	4	01/10/2018	ECBILL	1,500.00	mitzi	<input checked="" type="checkbox"/>	

Page 1 of 6 (60 items) 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.

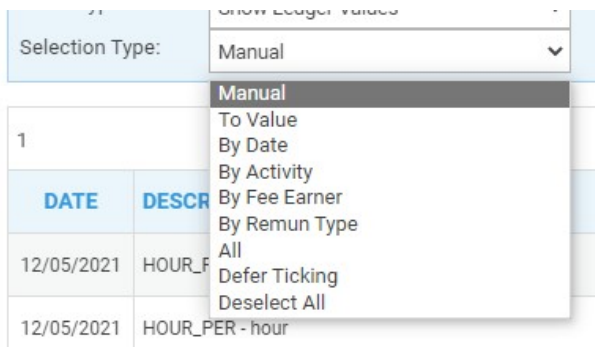
Time Recording > Tick Billed Time > Allocate WIP to Bill (ALB00002/1)

 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



- 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.