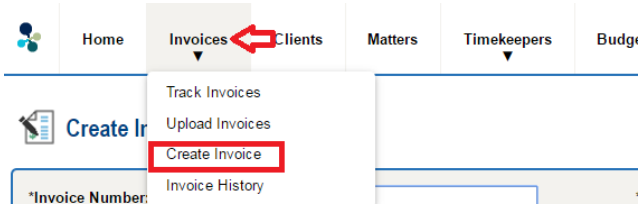
Collaborati:

How to Create a Total Fee Invoice (No TK req) with Attachments

Creating an invoice for a total fee is quite simple and fast.
Please ensure that your client's billing guidelines allow for total fee invoicing without the requirement for timekeepers.

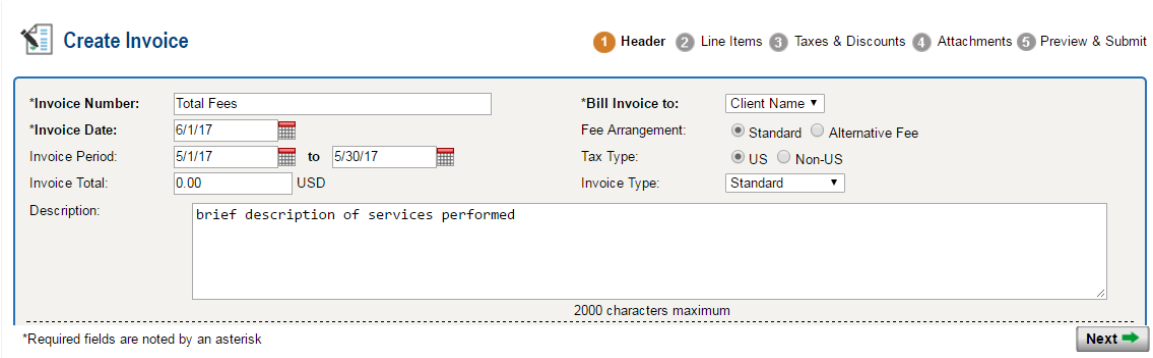
To start creating your invoice:

- Click the **Invoices** tab
- Click the **Create Invoice** option from the drop-down menu



1 HEADER

Fill in pertinent information. Most clients require the **Invoice Period**. The **Invoice Date** must be after the **Invoice Period**. It is recommended to leave the **Invoice Total** at $0.00, as Collaborati will automatically add the amounts. Write a brief description of the invoice in the **Description** box.



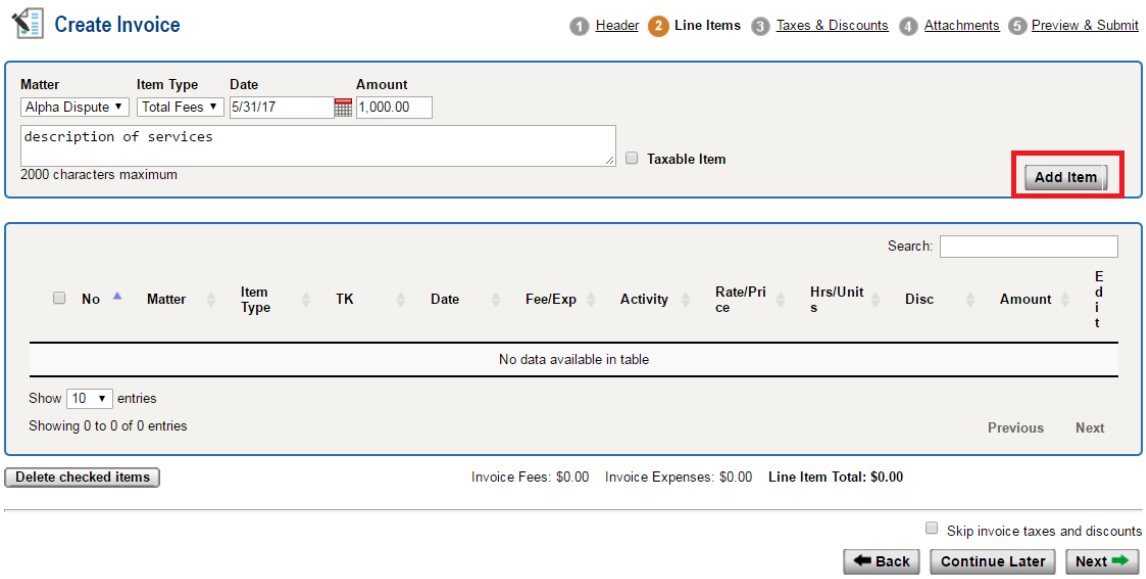
Click the **Next** button

2 LINE ITEMS

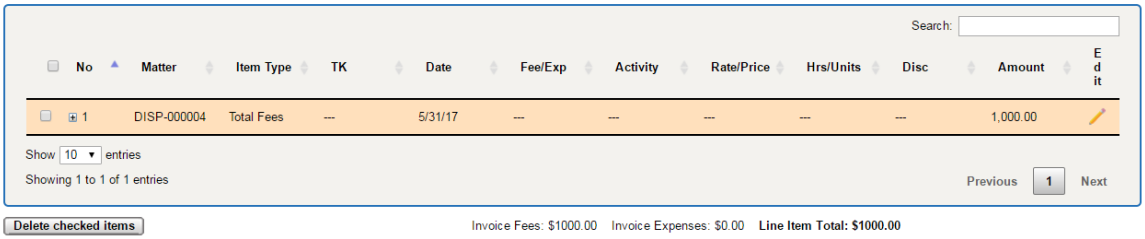
LINE ITEMS: Fees Input

Select your **Matter** from the drop-down list. **Item Type** is Total Fees. **Date** is the date of the service. **Amount** is the total amount of the fees. A description should be typed into the **Description** box.

Click on the **Add Item** button to finish the line item entry.



LINE ITEMS: Fees Complete



LINE ITEMS: Expenses Input

Follow a similar procedure for the Expenses, but for **Item Type**, select Total Exp. Click the **Next** button

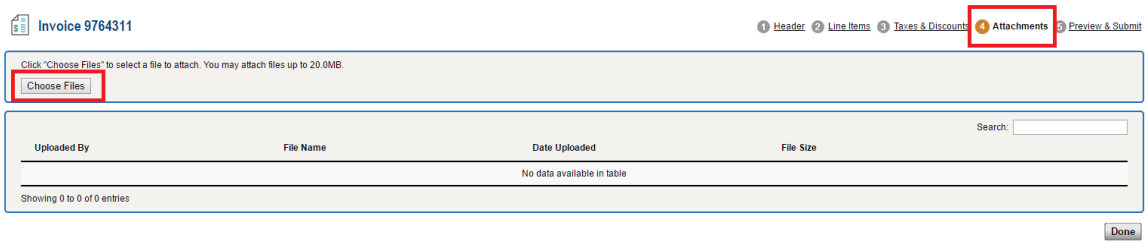
3 TAXES & DISCOUNTS

There may be no charges on this page if they are all detailed on your attached invoice. Click the **Next** button.

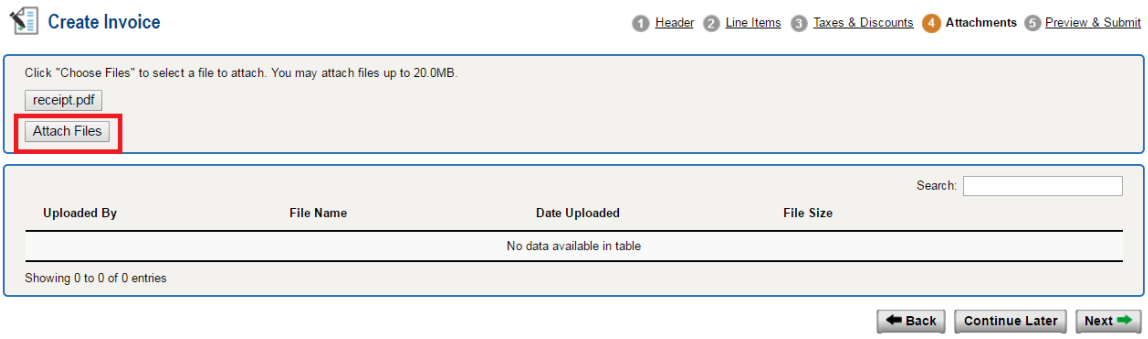
4 ATTACHMENTS

In this section you can attach any documentation to be sent with the invoice. Once the invoice is submitted, you will not be able to attach any files.

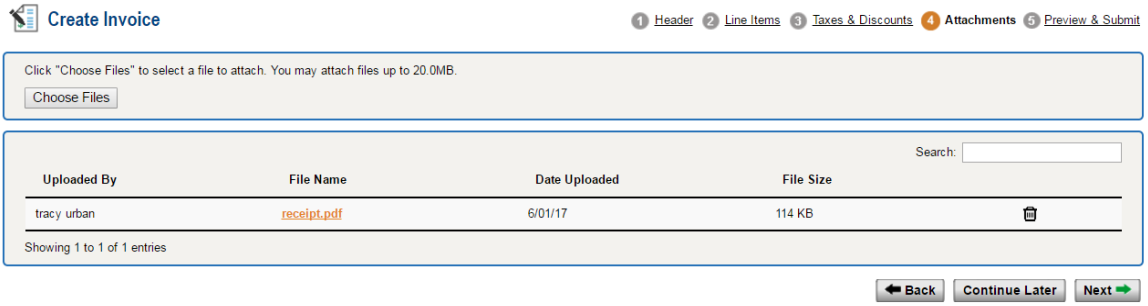
Use the **Choose Files** button to search for the document that you wish to attach.



After you have found the document, click the **Attach Files** button.



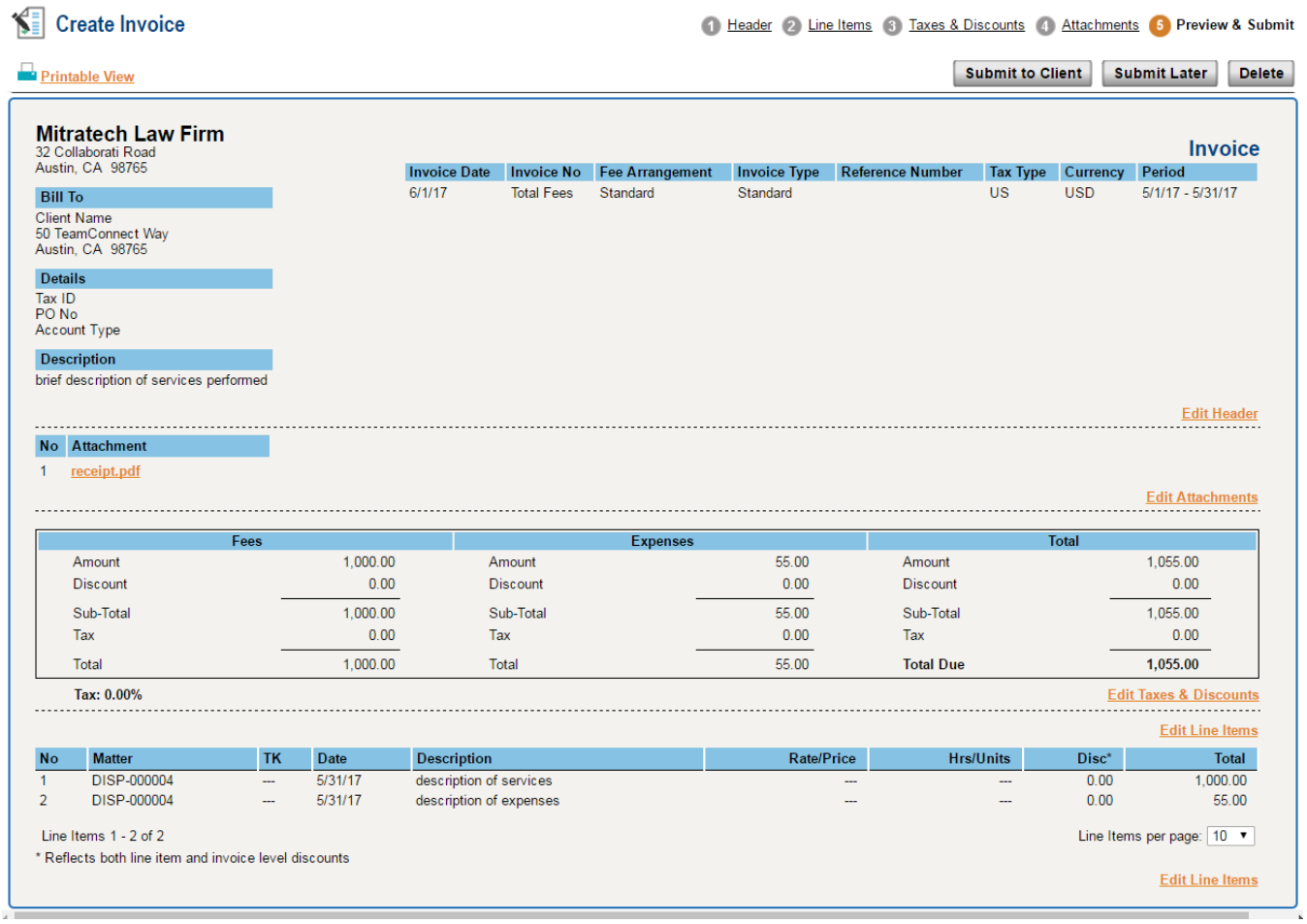
The document will appear in the attachment section.



Click the **Next** button

5 PREVIEW & SUBMIT

This invoice is now ready to submit using the **Submit to Client** button at the top right of the page.



Create Invoice

1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

Printable View

Submit to Client | Submit Later | Delete

Mitratech Law Firm
32 Collaborati Road
Austin, CA 98765

Invoice

Invoice Date	Invoice No	Fee Arrangement	Invoice Type	Reference Number	Tax Type	Currency	Period
6/1/17	Total Fees	Standard	Standard		US	USD	5/1/17 - 5/31/17

Bill To
Client Name
50 TeamConnect Way
Austin, CA 98765

Details
Tax ID
PO No
Account Type

Description
brief description of services performed

Edit Header

No	Attachment
1	receipt.pdf

Edit Attachments

Fees		Expenses		Total	
Amount	1,000.00	Amount	55.00	Amount	1,055.00
Discount	0.00	Discount	0.00	Discount	0.00
Sub-Total	1,000.00	Sub-Total	55.00	Sub-Total	1,055.00
Tax	0.00	Tax	0.00	Tax	0.00
Total	1,000.00	Total	55.00	**Total Due**	**1,055.00**

Tax: 0.00%

Edit Taxes & Discounts

Edit Line Items

No	Matter	TK	Date	Description	Rate/Price	Hrs/Units	Disc*	Total
1	DISP-000004	---	5/31/17	description of services	---	---	0.00	1,000.00
2	DISP-000004	---	5/31/17	description of expenses	---	---	0.00	55.00

Line Items 1 - 2 of 2

Line Items per page: 10

* Reflects both line item and invoice level discounts

Edit Line Items