Find Task Codes and Expense Codes for Invoices (Internal Billing Code)

Quick step-by-step guide to finding codes within Collaborati. The codes include Task Codes, Expense Codes, Activity Codes, Non-US Tax Codes and Internal Client Codes. If the code you are trying to bill against is not on the list, please contact your client and inquire about the code. Or if there are no codes listed, please contact your client or Collaborati Support for assistance.

The lists of fee and expense codes are populated in Collaborati when your client authorizes them.

To view the list of approved and authorized codes please follow the steps below:

1. Click “Clients” on the top menu bar
2. Choose your client.
3. Click the fourth icon from the top on the left navigation menu (“Codes”)
4. Click on either Fees or Expenses to view the list of available codes.
5. Displayed are the billing codes for this client. You may select which codes you wish to use (by checking the "Use" checkbox) and enter corresponding codes from your internal time and billing system (by editing the "Internal Billing Code" field).

For example, if your firm always uses "X111" for "Case Administration" you can replace the "B110" in the Internal Billing code field with "X111".
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