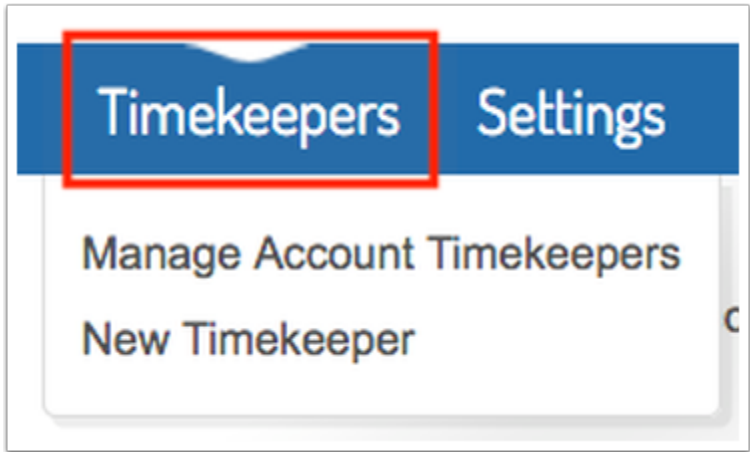
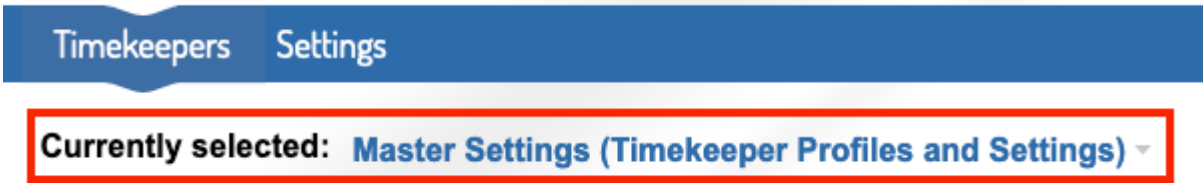
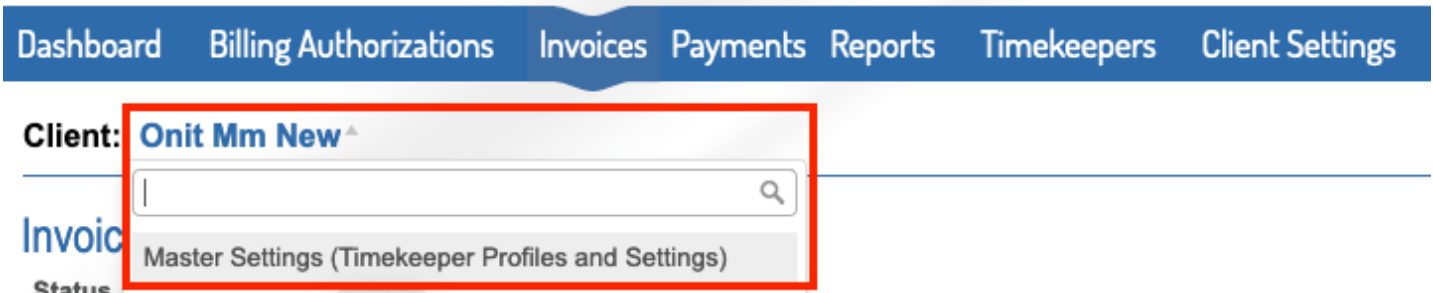
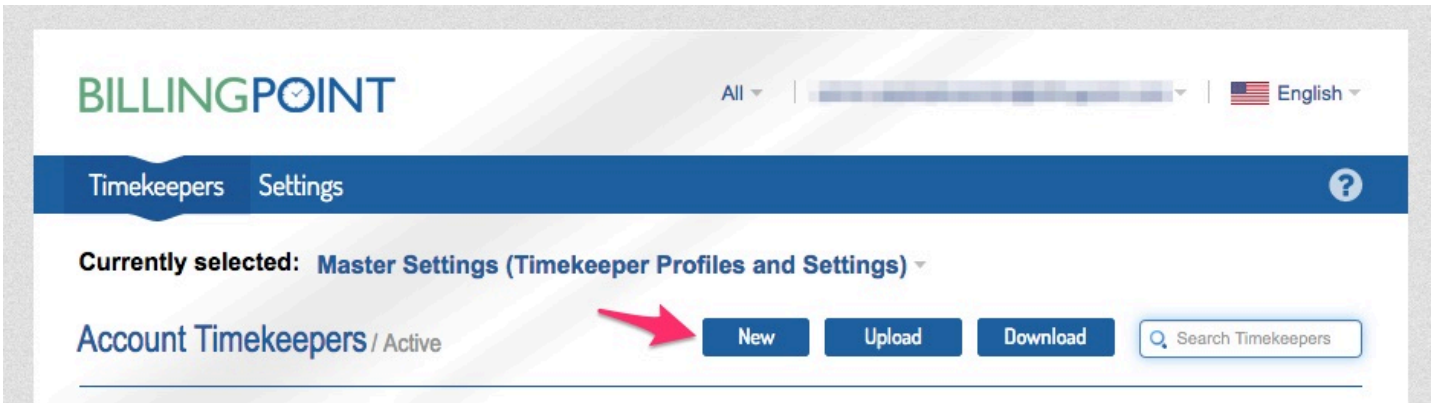


Adding a New Timekeeper

1. Within the Master Settings, under the Timekeeper tab on the top blue bar, select either New Timekeeper or Manage Account Timekeepers.



2. If you chose Manage Account Timekeepers, then click the New button.



3. Complete the New Timekeeper form with the timekeeper's information. Anything with a red asterisk is required (note: Date Bar Passed and Year First Practiced Law are only required if the timekeeper is a law graduate).

New Timekeeper

Timekeeper ID *

Gender *
Select gender...

Timekeeper Name *

Ethnicity *
Select ethnicity...

Staff Class *
Select a staff classification...

Lawyer
☐ Check if this timekeeper is a law graduate.

Standard Rate *

Date Bar Passed
YYYY (e.g. 2000)

Default Rate Effective Date

First Practiced
YYYY (e.g. 2001)

Currency
Select a currency...

Profile Link

URL should have (http:// or https://) or leave blank

Initials *

Bio

Email *

Resume
Browse

Office *
New York

Create Timekeeper

4. After the timekeeper is added in the New Timekeeper form, they will be listed as an **account timekeeper**. Don't stop here, there is another step to get an approved rate to bill a client.

BILLINGPOINT

All | | English

Timekeepers Settings

Currently selected: Master Settings (Timekeeper Profiles and Settings)

Account Timekeepers / Active

New Upload Download

Search Timekeepers

Archive Delete

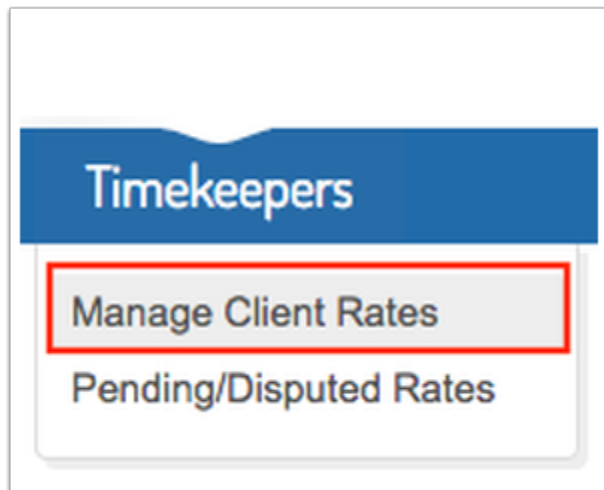
Active (11) | Archived (0) | Deleted (0)

	TK ID	Timekeeper Name	Staff Classification	Std Rate	Actions
<input type="checkbox"/>	8911	Nick Jones	Partner	500.00 USD	Edit
<input type="checkbox"/>	7663	Jessica White	Of Counsel	450.00 USD	Edit
<input type="checkbox"/>	4194	Hillary Gates	Associate	200.00 USD	Edit
<input type="checkbox"/>	1452	Lucas Rames	Partner	600.00 EUR	Edit
<input type="checkbox"/>	3723	Henry Walls	Paralegal	300.00 EUR	Edit
<input type="checkbox"/>	NONE	NONE	Non-Legal Professional	100.00 USD	Edit
<input type="checkbox"/>	9842	Rich Harris	Partner	500.00 USD	Edit
<input type="checkbox"/>	3178	Justin Jones	Partner	600.00 USD	Edit
<input type="checkbox"/>	1398	Brian Richards	Partner	700.00 USD	Edit
<input type="checkbox"/>	9831	Kristen Jones	Of Counsel	500.00 USD	Edit
<input type="checkbox"/>	DE123	Dana Edel	Associate	200.00	Edit

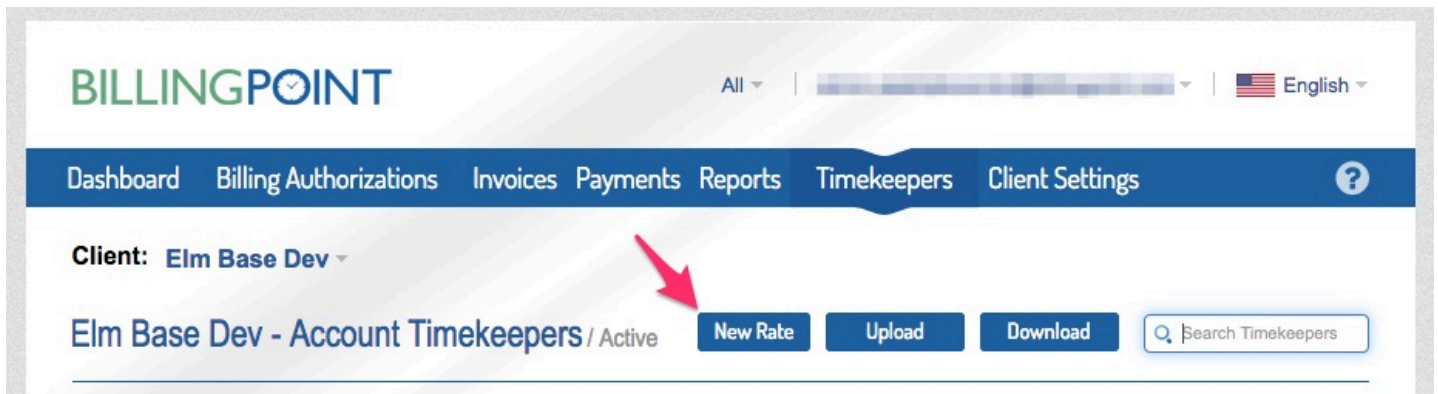
5. Next, switch to your client specific account view.



6. Under the Timekeeper tab on the top blue bar, select Manage Client Rates.



7. Click the New Rate button.



8. Fill out the New Client Timekeeper Rate form. You will have to select your timekeeper from the account timekeeper list where they were just added. Fill out the required fields (*note: the effective date should be **prior** to any time that will be billed*). If your client utilizes custom Staff Classifications, they will be available in the dropdown for selection. Click send for the timekeeper to be sent to the client for approval.

Elm Base Dev / New Client Timekeeper Rate

Please select a timekeeper from right list to see data here.

Timekeeper * Select a Timekeeper...
Henry Walls
Hillary Gates
Jessica White
Lucas Rames
Nick Jones

Add new rate for timekeeper

Client Project
Select a Project...

Staff Class *
Mid-Level Associate

Effective Date *

Rate *

Currency *
USD

Reason
Reason to increase rate

Send

9. On the client timekeeper list, you will then see the new timekeeper listed with a rate in the Pending Rate column.

Elm Base Dev - Timekeepers / Active

New Rate Upload Download Search Timekeepers

Archive Delete Active (3) | Archived (0) | Deleted (0)

	TK ID	Timekeeper Name	Staff Classification		Approved Rate	Pending Rate	Actions
<input type="checkbox"/>	8911	Nick Jones	Partner			500.00 USD	Manage Rates

10. Once the client has approved the rate, the rate will then show in the Approved Rate column and you can bill for that timekeeper at that rate.

Archive Delete

Active (3) Archived (0) | Deleted (0)

<input type="checkbox"/>	TK ID	Timekeeper Name	Staff Classification		Approved Rate	Pending Rate	Actions
<input type="checkbox"/>	8911	Nick Jones	Partner		500.00 USD		Manage Rates
<input type="checkbox"/>	7663	Jessica White	Of Counsel		440.00 USD		Manage Rates
<input type="checkbox"/>	4194	Hillary Gates	Associate		175.00 USD		Manage Rates

Information for Matter Level Timekeeper Rates can be found [here](#).