

Time tracking and billing

Automatically captures billable time from attorney activities, validates entries against client matter codes, and generates invoices in the firm's practice management system. Reduces manual time entry errors and ensures all billable work is properly captured and invoiced.

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Get Your Blueprint

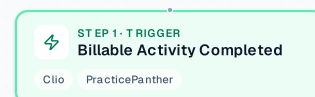
WORKFLOW TRIGGER

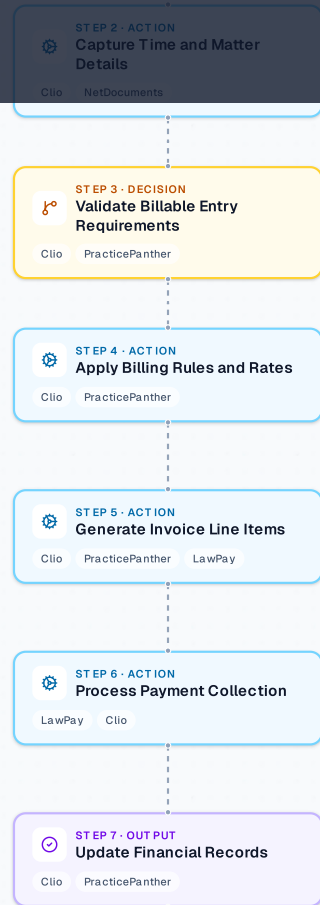


Attorney completes a billable activity (document review, client call, court appearance, etc.)

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Billable Activity Completed

Attorney finishes work on a client matter such as document review, client consultation, or court preparation. Time tracking begins automatically based on calendar events or manual time entry.

2

 ACTION

Capture Time and Matter Details

System automatically logs the duration, attorney, client matter code, and activity type. Integrates with calendar systems and document management to pull relevant case information.

Clio

NetDocuments

3

 DECISION

Validate Billable Entry Requirements

Checks if the time entry meets firm billing requirements including minimum time increments, proper matter coding, and client billing arrangements. Routes entries that need review vs. auto-approval.

Clio

PracticePanther

4

 ACTION

Apply Billing Rules and Rates

Automatically applies the correct hourly rates, billing arrangements, and any applicable discounts or caps based on client agreements. Calculates total billable amount for the entry.

Clio

PracticePanther

5

 ACTION

Generate Invoice Line Items

AI Business OS

Creates detailed invoice line items with descriptions, time spent, rates, and total charges. Groups entries by matter and client for organized billing presentation.

Clio PracticePanther LawPay

6

 ACTION

Process Payment Collection

Automatically sends invoices to clients through secure client portals and processes payments. Sets up payment plans or retainer deductions as configured for each client.

LawPay Clio

7

 OUTPUT

Update Financial Records

Posts all billing and payment information to the firm's financial tracking systems. Generates reports on billable utilization, collection rates, and attorney productivity metrics.

Clio PracticePanther



Outputs

- Accurate client invoices with detailed time entries

AI Business OS

- Real-time billable hours tracking per attorney
- Automated payment processing and collections



Key Metrics

- Billable hour capture rate
- Time-to-invoice processing
- Client payment collection rate



Tools & Integrations

- Clio
- PracticePanther
- NetDocuments
- LawPay

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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