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PDF Invoice Guide

Your guide to composing a clear and comprehensive PDF invoice for processing through Brightflag.

1. Checklist for a PDF invoice:

- ☐ Firm name
- ☐ Firm address
- ☐ Entity address
- ☐ Invoice number
- ☐ Invoice date
- ☐ Matter reference
- ☐ Fee Totals
  - ☐ Professional services
  - ☐ Tax
  - ☐ Disbursements
  - ☐ Discounts / Reductions
  - ☐ Invoice total
- ☐ Professional service details (details lines)
  - ☐ Include rates in line items
- ☐ Disbursements / Expenses
- ☐ Timekeeper details / fee summary

2. What other best practices should I follow?

Detail Lines
- Ensure detail lines show the date, timekeeper, times, and rates for the work that has been carried out.
- The rates currency should match that of the fee totals.
- Ensure the narrative lines are clear and that details of the work carried out are comprehensive.
  - Telephone call ❌
  - Telephone call with client re: court appearance ✅

Disbursements and Expenses
- Disbursements/expenses should be clearly marked and separated from the hourly fees.

Discounts
- Discounts should be recorded at the invoice summary level and not within the detail lines.

Time and Currency
- Times should be in HH:MM and only in numeric format.
- The currency should be clearly shown.

Advance Payment
- Advance payments (prepaid fees) should be included in the invoice summary as a reduction and deducted from the professional service fees when uploading via the law firm portal.

Retainers
- If a retainer fee is being included in the invoice, the amount should be listed in the invoice summary and labelled appropriately. If said retainer is used to pay for an invoice, it should be deducted directly from the professional fees when uploading via the law firm portal (as with advance payments).

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Sample PDF Invoice

Client Name
Client Entity Address
4321 Sample Street
City
Country

AB Law Firm
1357 Sample Street
City
Country

Include the invoice date and matter information here

Invoice No. 246810
Date: 11/11/21
Matter Name
Matter Ref: 1357911

The invoice summary should detail all fees, tax amounts, discounts and disbursements.

Invoice Summary

The invoice currency should be clearly shown

	Amount (USD)	Tax (10%)	Total (USD)
Fees	1405	140.5	1545.5
Disbursements/Expenses	155	15.5	170.5
Total (USD)	1560	156	1716
Less Discounts			-200
			Invoice Total: $1,516

Discounts and any other "reductions" (see **Note** below) should appear in this section - separate from the line items.

Note: advanced payments/prepaid fees/retainer fees/trust amounts should be subtracted from the *Fee* total input on the 'Upload Invoice PDF' page in Brightflag. Do not list these as discounts. See the box to the right for an example scenario.

A $120,000 invoice ($90,000 fees + $30,000 expenses and no tax), where $40,000 was covered by an retainer fee/other advance payment should be entered in Brightflag as:

Fees: 50,000
Discounts: 0
Expenses: 30,000
Taxes: 0
Total: 80,000

Fees for Professional Services

Date	Timekeeper	Hours	Rate (USD)	Description	Amount (USD)
01/08/21	MS	2:00	220	Call with client re: statement of work	440
03/08/21	JM	1:00	180	Drafting statement of work	180
05/08/21	MS	0:30	220	Review email from client	110
07/08/21	MS	2:00	220	Travel to New York City	440
09/08/21	JM	1:00	180	Review and collate documents	180
11/08/21	MS	0:15	220	Call with client	55
					$1,405

Timekeeper Details

Initials	Name	Role	Time	Rate (USD)	Total (USD)
MS	Mary Smith	Partner	4:45	220	1045
JM	John Murphy	Snr. Associate	2:00	180	360

Disbursements

Description	Amount (USD)
Travel expenses	90
Photocopying	65
	$155

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