



## 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).



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.

The invoice currency should be clearly listed

Invoice Summary

	Amount (USD)	Tax (10%)	Total (USD)
<b>Fees</b>	2,955.00	295.50	3250.50
<b>Disbursements/Expenses</b>	155.00	15.50	170.50
<b>Total (USD)</b>	3110.00	311.00	3,421.00
<b>Less Discounts</b>			-200.00
			<b>Invoice Total: \$3,221.00</b>

Discounts and 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 New PDF Invoice' 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 a retainer fee/ other advance payment should be entered in Brightflag as:

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

### 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
	<b>\$155</b>

Details of disbursements or expenses should be listed along with the total amount that appears in the invoice summary

- ✓ Line Date
- ✓ Timekeeper initials
- ✓ Total Hours
- ✓ Timekeeper Rate
- ✓ Line Description
- ✓ Line Total

Time recordings in HH:MM format

### Hourly 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
				Total	1,405

### Fixed Fees for Professional Services

Date	Units	Rate (USD)	Description	Amount (USD)
12/08/21	1	500	Draft fixed-fee engagement letter	500
13/08/21	1	300	Prepare standard NDAs for client	300
15/08/21	1	750	Flat fee for project management	750
			Total	1,550