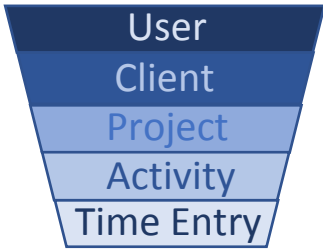


# How do set up billing rates?



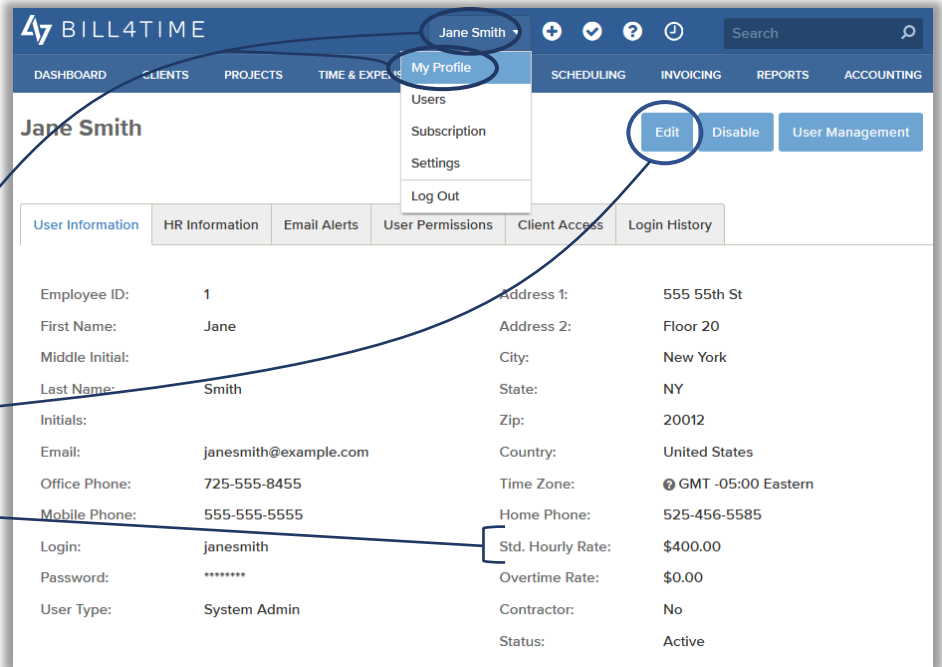
The billing rates trickle down from the user, to the client, to the project, to the activity, and finally to the individual time entries. You must have access to view and edit rates in order to continue through these instructions.

*For example, changing the rate on the User's profile affects the rate for the client, project, and time entries. Changing the rate for a project only affects the project*

## To set a **User Billing Rate:**

Changing a user's billing rate affects rates Throughout the system for just that user.

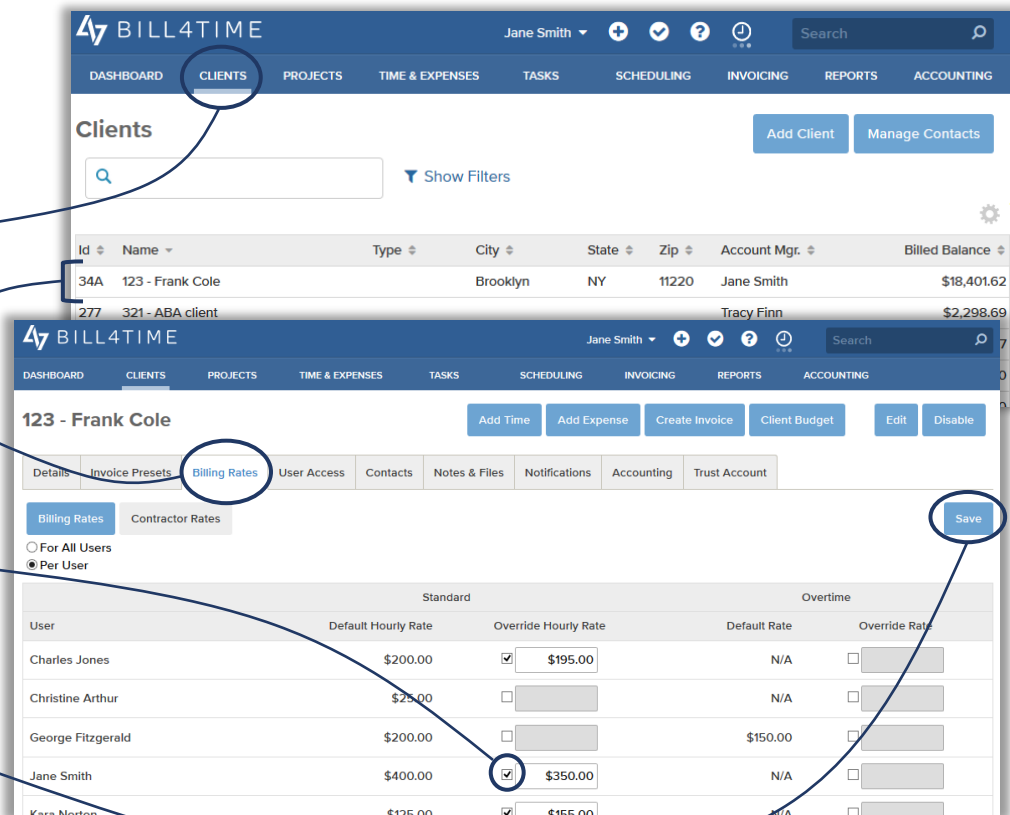
- Step 1:**  
Click your name located at the top right and select "My Profile".
- Step 2:**  
Click the Edit button, top right.
- Step 3:**  
Change the Std. Hourly Rate.
- Step 4:**  
Click the Save button, top right.



## To set a **Client Billing Rate:**

Changing a client's billing rate will affect all projects and time entries under that specific client.

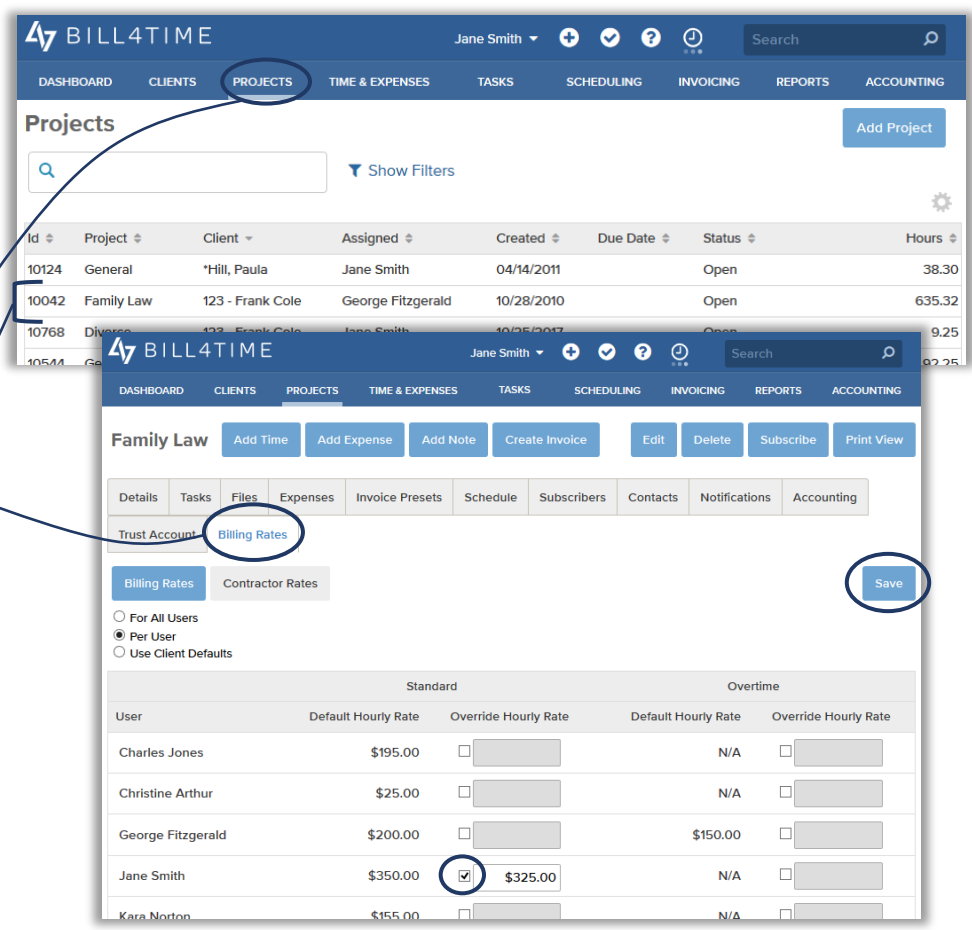
- Step 1:**  
Click the Clients tab from the menu.
- Step 2:**  
Click on the desired client.
- Step 3:**  
Click on the client's Billing Rates tab.
- Step 4:**  
Check the box next to each user you want to change, and type in the desired rate in the Override Rate field. You will see the user's default rate as set in the user's profile.
- Step 5:**  
Click the Save button.



**To set a *Project Billing Rate*:**

Changing a project's billing rate will affect all projects and time entries under that specific project.

- Step 1:**  
Click the Project tab from the menu.
- Step 2:**  
Click on the desired project.
- Step 3:**  
Click on the project's Billing Rates tab.
- Step 4:**  
Check the box next to each user you want to change, and type in the desired rate in the Override Rate field. You will see the user's default rate as set in the user's profile.
- Step 5:**  
Click the Save button.



**To set the rate per *Activity*:**

Using billable activity rates will override user, client, and project rates in the system for every client & project.

- Step 1:**  
Click your name and select Settings.
- Step 2:**  
Click on the Custom Lists tab.
- Step 3:**  
Click Edit next to Billable Activity Types.
- Step 4:**  
Check the box next to "Rate" to enable rates per activity. Then enter in a rate for the activity as needed.
- Step 5:**  
Click the Save button.



## To set the rate per *Time Entry*.

Using billable activity rates will override user, client, and project rates in the system for every client & project.

**Step 1:**  
Click on Time/Expenses from the menu

**Step 2:**  
Click on the desired time entry.

**Step 3:**  
Check the box next to Override Rate than enter the desired amount.

**Step 4:**  
Click Save & Close.

Dashboard showing Time & Expenses for the week of July 23, 2018. The interface includes a navigation menu with 'TIME & EXPENSES' circled in blue. A bar chart displays 'My Hours' for the past 30 days. Below the chart is a table with columns for Date, User, Client, Project, Private Description, Cost, Labor (hrs), and Total (hrs). A specific entry for 07/23/2018 is highlighted, showing 3.50 hours of labor for 'Documentation drafted and collected for upcoming client meeting'.

Form titled 'Edit Time Entry' showing details for Work Entry # 26301. The form includes fields for User (Jane Smith), Client (123 - Frank Cole), Project (Family Law), and Activity (Documentation). The 'Rate \$' field is set to \$325.00 with an 'Override' checkbox checked. The 'Labor Time (hrs)' is 3.50 and 'Billable (hrs)' is 3.50. The 'Save & Close' button is circled in blue.