

# Customisable Billing Estimates

## Iken Cloud Enhancement



Search [ ] [ ] [ ]

Set billing estimates

Reference	Name	Opened
12 Apple Street, Cranchester, CC10 9AF		02/01/2024
fol-inf-010	FOI - Cranchester Council HR Department - Cr	13/07/2021
sch-adb-003	Cranchester Juniors - Grant Melton	06/07/2021
hus-dis-005	3 The Range, Cranchester	22/06/2021
sch-adb-002	Cranchester Infants - Mik	21/06/2021
hus-dis-005	Crossways, Cranchester,	18/06/2021
con-les-010	Hearts Delight, Cranche	05/06/2021
con-rtb-010	16 Leivers Road, Cranchester, CC14 9JD	05/05/2021
hus-dis-004	14 Sandwich Close, Cranchester, CC20 3QC	19/05/2021
sch-adb-001	Cranchester Grammar - Freja Hubbard	17/05/2021

Total charges  
**£ 1,000.00**

Estimate

£ 2,500.00

✓ Within estimate 40%

Total recorded  
**4:24:00**

Estimate

120 : 0

✓ Within estimate 24%

**Medium**

Your matter has reached 50% of its estimate

Crossways, Cranchester CC14 8HY

# The Challenges and Needs for Billing Estimates



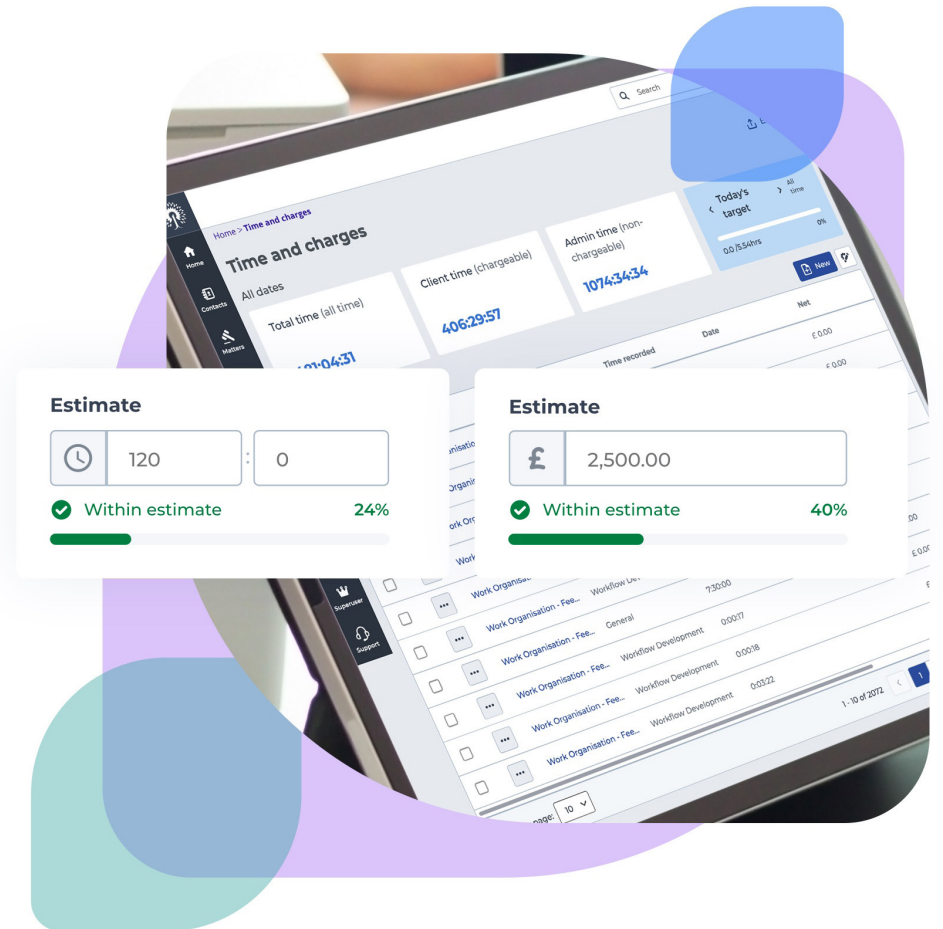
**Configurable Time and Charge Estimate.** Easily track case progress against estimates at a glance and receive timely notifications as cases approach or reach their estimates. Customise these alerts to suit your needs, ensuring you stay informed and in control of your case management.



**Prompt notifications** if a case reaches its initial estimate sooner than expected, allowing re-estimation and new agreements.

**Adjustable notifications** for initial pre-paid or complimentary time and any additional agreed-upon time.

**Clear view of total estimated and actual values** across all client cases or specific types, accessible via dashboards.



# Iken's Solution



## Seamless Billing and Case Tracking



### User-Configurable Estimate Inputs

- ✓ You can configure estimates for both time and charges.
- ✓ Set configurations for either one or both, depending on your needs.



### Simple UI/UX

- ✓ A simple user interface allows you to toggle the visibility of estimates.
- ✓ Only users for whom estimates are relevant need engage with this functionality, without impacting others or the wider system.



### Monitoring and Alerts

- ✓ Real-time notifications can be sent to case owners as cases approach or exceed their estimates.
- ✓ Define your own thresholds for alerts, rather than relying on predefined limits set by the software.



### Business Intelligence Dashboards

- ✓ Access business intelligence dashboards to get a comprehensive view of estimated versus actual values.



### Proactive Management

- ✓ Receive early notifications, allowing you to take action to re-estimate and discuss new approaches with clients.

# How It Works

The Billing Estimates update in Iken Cloud allows you to set and manage time and charge estimates for each case. When estimate alerts are configured, our system monitors these estimates and generates alerts when thresholds are met, ensuring that case owners stay informed and can take proactive steps. [Here's how it works:](#)

**1 Setting Estimates:**  
Set time and charge estimates, monitor differences, and display utilisation percentages for clear tracking.

**2 Toggle Options:**  
Easily toggle rounded time and enable setting estimates for precise case management.

**3 Monitoring Estimates:**  
Receive real-time updates and visual indicators for exceeded estimates to stay on top of your cases.

The screenshot displays the 'Billing' section of the Iken Cloud interface. At the top right, a notification bubble indicates 'Your matter has reached 50% of its estimate' for 'Crossways, Cranchester CC14 8HY'. Below this, two toggle switches are visible: 'Apply rounded time' (checked) and 'Set billing estimates' (checked). The main dashboard features five summary cards:

- Total recorded time:** 4:24:00 (Actual: 4:20:31, Estimate: 120, 24% within estimate)
- Recorded time:** 4:24:00 (Actual: 4:20:31)
- Total charges:** £ 1,000.00 (Actual: £ 968.39, Estimate: £ 2,500.00, 40% within estimate)
- Charges:** £ 1,000.00 (Actual: £ 968.39)
- Unfinalised time:** 4:24:00 (Actual: 4:20:31)
- Finalised time:** 000:00:00 (Actual: 000:00:00)

At the bottom, a table lists case actions:

Action	Matter	Type	Time recorded	Date	Net	Status
<input type="checkbox"/>	...	45 Barbican High Street	Drafting	00:22:21	14/2/24	£ 44.23 Open
<input type="checkbox"/>	...	Fly Tipping Presecution	Email	00:02:34	14/2/24	£ 13.23 Open

**1 Alert Setup:**  
 Customise alerts with specific conditions, recipients, and prioritisation to ensure timely actions.

**2 Alert Conditions:**  
 Set multiple threshold alerts for time and charge estimates, such as alerts for reaching percentage thresholds.

**3 Customisable Alerts:**  
 Define specific conditions and messages for alerts and customise messages for different alert conditions.

**Billing**

Total recorded time  
**4:24:00**

Actual: 4:20:31

Estimate  
 120  
 Within estimate

**1** Alert triggers ———— **2** Alert details

Step 1  
**Alert triggers**

Alert for: Matter

**When**

- Estimate 50 %
- Estimate 75 %

**3** **Conditions**

- Matter risk Is High priority

Action	Name	Type	Duration	Date	Amount	Status
<input type="checkbox"/>	Sienna Cullen	Telephone conversation	00:32:21	14/2/24	£ 32.67	Open
<input type="checkbox"/>	Jett Case	Meeting	01:21:02	14/2/24	£ 123.23	Open
<input type="checkbox"/>	Michael Roberts	Emails	00:12:21	14/2/24	£ 18.99	Open

Our billing estimate feature update will address your needs by providing configurable estimates, real-time tracking, and customisable alerts. The solution will enhance your experience through a simple and intuitive interface, leveraging existing system capabilities and laying the groundwork for future enhancements.

Set billing estimates



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Crossways, Cranchester CC14 8HY



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