eBILLINGHUB

Using Image Connect

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OVERVIEW

WHAT IS IMAGE CONNECT?

Image Connect is a web-based imaging solution that manages supporting documentation for client invoices. When integrated with eBillingHub, users can easily retrieve document attachments when processing invoices for their clients.

The option to use Image Connect is available through Elite Enterprise and easily enabled by the eBillingHub Application Administrator for all eBillingHub users at a law firm. (See Configure eBillingHub for Image Connect Access)

If a firm does not have Image Connect access, contact the eBillingHub Support Team at 888-252-2607, Option 2, for further information.

USING IMAGE CONNECT WITH EBILLINGHUB

Image Connect matches invoice numbers with the supporting documentation that a law firm requires for client billing. The user selects a client invoice *using the invoice number as the unique identifier,* and issues a request to Image Connect to retrieve the matching documents that support the invoice. This process incorporates all the functionality for identifying, attaching, and submitting the document images with client invoices using eBillingHub's Billing Wizard or Quick Invoice option.

CONFIGURE EBILLINGHUB FOR IMAGE CONNECT ACCESS

Configuration > Configure eBillingHub > Configure System > Configure 3rd Party Integrations

Configuring Image Connect for eBillingHub is an easy process for the eBillingHub Application Administrator and requires only a single law firm user ID. The *Connect As* ID must be an existing Image Connect user with access rights to all document types (i.e. invoices, fees, expenses, etc.).

The completion of this process provides Image Connect database access to *all* eBillingHub users within the law firm.

ACTIVATE IMAGE CONNECT FOR A LAW FIRM

Do the following to activate Image Connect for your law firm:

1. Select **Configuration** from the **Task Bar**.
2. Select **Configure eBillingHub** from the drop-down list.
3. Select the **Configure System** tab.
4. Select **Configure 3rd Party Integrations** from the option list to display the setup fields.
5. Select **Image Connect** from the **3rd Party** field drop-down list.
6. Check the **Active** box.
7. Type a law firm user ID in the **Connect As** field.

Note: This user ID must be an existing Image Connect User that has access to all document types.

8. Click **Save** to update the configuration and provide connectivity to all law firm users.

IMAGE CONNECT IN EBILLINGHUB

SELECT INVOICES

The first step is to identify and retrieve the invoice(s) containing images of supporting documentation using **either eBillingHub's Billing Wizard or Quick Invoice**.

1. Select **Billing** from the **Task Bar** menu and select either **Billing Wizard** or **Quick Invoice** to retrieve the invoice(s).

2. Click **Next** Next >> to retrieve the selected invoice(s) and continue to the **Review Validation Report** process.

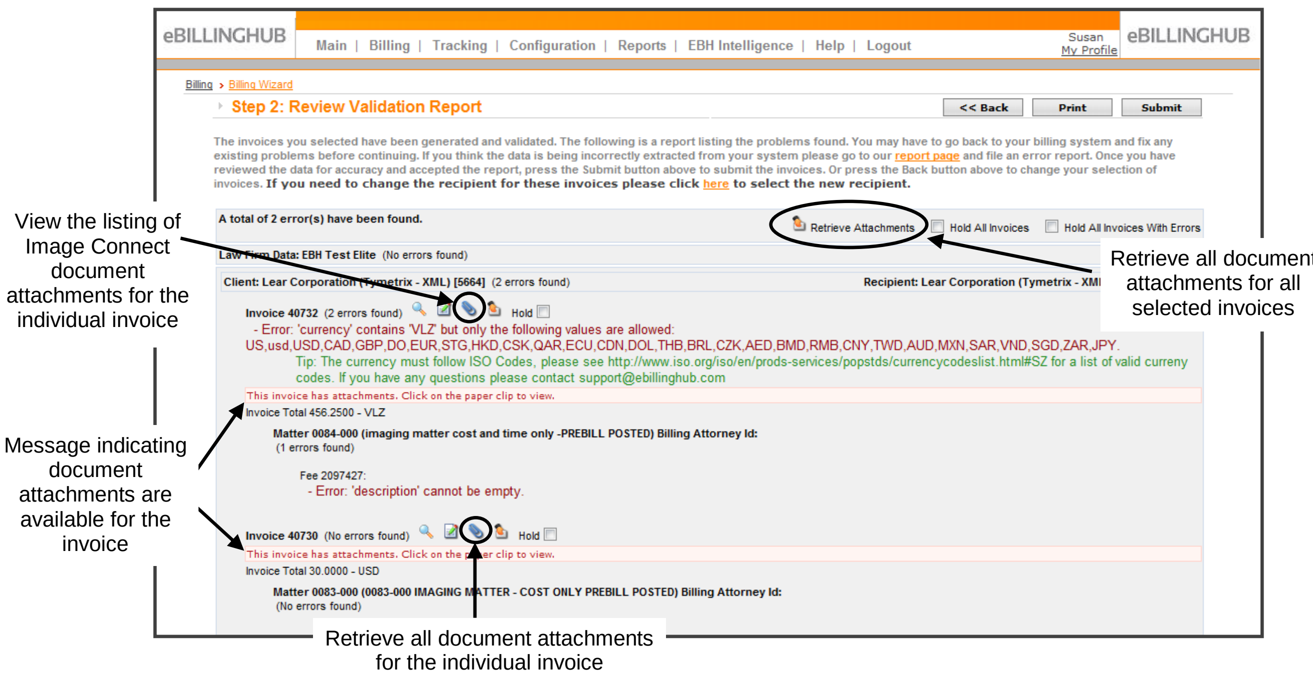
Note: The time it takes to retrieve the selected invoices depends on the number of matters and the associated line items (e.g. fees, expenses, etc.) detailed in the invoice.

REVIEW VALIDATION REPORT

This step generates and validates the selected invoice(s). There are two methods for retrieving Image Connect document attachments for invoices:

- Retrieve all document attachments for all selected invoices using the **Retrieve Attachments** icon located in the top right corner of the invoice listing.
- Retrieve all document attachments for a single invoice using the **Retrieve Attachments** icon located next to the *(individual)* invoice number.

Retrieve Attachments icon



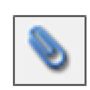
Note: See online help field definitions for more detail

RETRIEVING DOCUMENT ATTACHMENTS

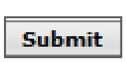
1. Click the **Retrieve Attachments** icon (for all selected invoices or an individual invoice).

Note: A message displays under the invoice number indicating that attachments are available.

2. Click the **Paper Clip** icon to view the listing of **Existing Files** retrieved from Image Connect (See Invoice Attachments Window).



Paper Clip icon

3. Click **Submit** 

to submit the invoice(s).

4. Click **OK** to confirm the request to submit the invoices with the attachments and proceed to the **Review Submission Report** page.

INVOICE ATTACHMENTS WINDOW

The attachments window displays files retrieved from Image Connect for the selected invoice. A user can perform the following actions:

- View the individual documents retrieved from Image Connect**.**
    - Click the file name to view the file attachment in the document viewer.

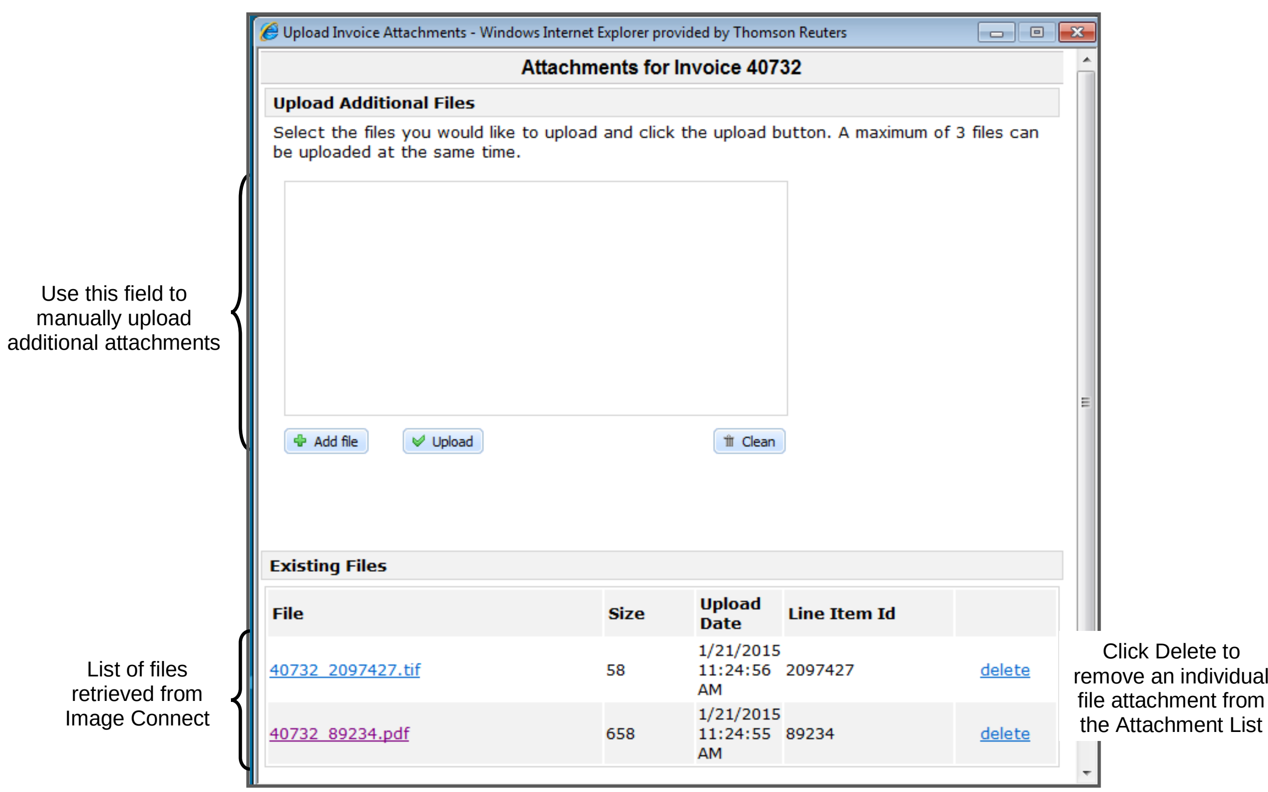
Note: When any changes occur to Image Connect files (i.e., add/delete/update), the user must retrieve the document(s) again

- Delete individual documents in the **Existing Files** listing.
    - Click **Delete** to remove an attachment file from the invoice.

Note: Using the **Delete** option for an existing file only deletes it from the **Attachment List**. It does not delete the file from the Image Connect database.

- Manually upload additional file attachments.
    - Click **Add File** to locate and upload any additional files to the invoice.

Note: Only attachments retrieved from Image Connect display in the **Attachment List** when the **Paper Clip** icon activates the **Invoice Attachments Listing**. Manually upload any additional attachments for the invoice only after uploading the Image Connect files

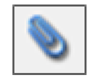


REVIEW SUBMISSION REPORT

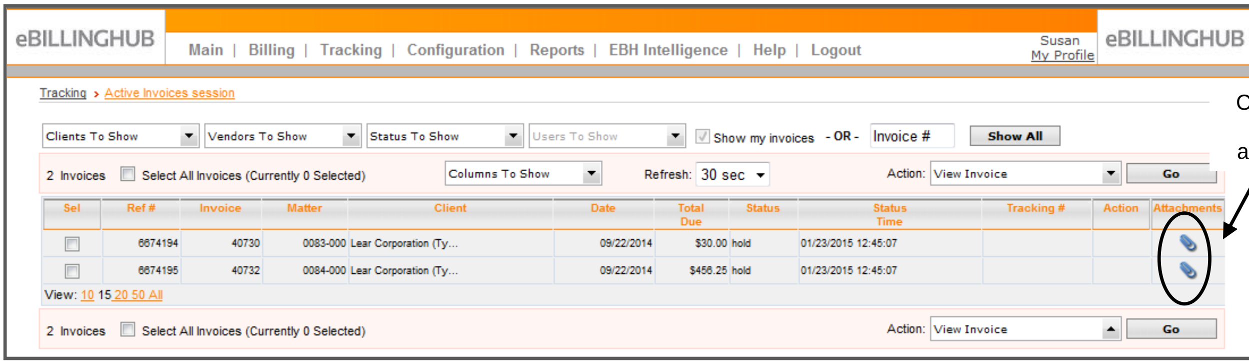
In this final step, do the following to view the status of the individual invoice submissions submitted to the Vendor:

1. Click **Live Update** 

 to display the invoice tracking data.
2. Click the **Paper Clip** icon to view the list of file attachments issued with the invoice to the client.



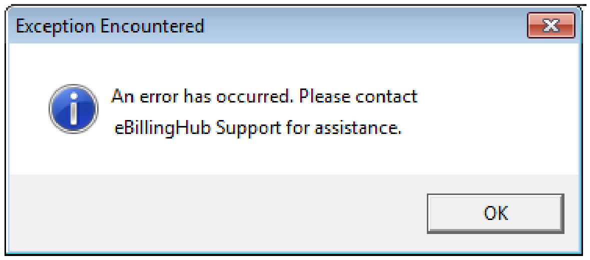
Paper Clip icon



Click to view invoice attachments

ERROR MESSAGES

Report any error messages received when using Image Connect to the eBillingHub Support team.
eBillingHub Support: 888-252-2607, Option 2



TIPS & TRICKS

- Click the **Retrieve Attachments** icon only once.

  With each click of the **Retrieve Attachments** icon, the attachments list is completely refreshed from the Image Connect database. This means that if there are any changes within the Image Connect database containing the invoice attachments or if any manually attached documents were uploaded, after the initial Image Connect document retrieval, they will not be listed in the **Attachments Listing** when the **Retrieve Attachments** icon is clicked a second time.