User Guide

Relativity® 10.0 and above, Relativity®One

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What is MaxBilling?

MaxBilling is an application that you can use to automate Relativity® billing process by setting up corresponding billing rates for various metrics and generating detailed reports with calculated costs. You can then download these reports as PDF and Excel files, have them sent via email at specific schedules and generate report-based invoices.

Installation

To install **MaxBilling** as a Relativity® administrator:

1. Upload the provided .RAP file in the Application Library.
2. Select a placeholder/admin workspace.

Note: You must install **MaxBilling** only on a single Relativity® placeholder/admin workspace per Relativity® instance.

All **MaxBilling** agents are created automatically during installation.

For more information on the agents that ship with **MaxBilling**, see MaxBilling Agents section.

MaxBilling Upgrade

To upgrade **MaxBilling**:

1. Install the provided .RAP file.
2. Ensure all **MaxBilling** agents are enabled.

MaxBilling Agents

MaxBilling ships with the following agents:

- **MaxBilling Daily Statistics Collector** - collects statistics for the dtSearch Index, Analytics Indexes, File and Item statistics on a daily basis.
- **MaxBilling Admin Object Sync** - synchronizes Relativity® Groups, Users, Clients, Workspaces with the corresponding MaxBilling objects.
- **MaxBilling Report Generator** - generates **MaxBilling** reports.
- **MaxBilling Scheduler Agent** - checks if there are active schedules and creates report generation requests for them.
- **MaxBilling PostInstallUpgrader Agent –** executes the necessary upgrades of the existing items after **MaxBilling** upgrade.

- **MaxBilling Invoice Generator Agent** – generates **MaxBilling** invoices.
- **MaxBilling SalesForce Data Tier Syncer** – synchronize Data Tier according to the information in Salesforce Data Contract. (available in Relativity®One only)
- **MxB StageFence Statistics Collector** - collects statistics for Stage Fence Usage on a daily basis. (available in Relativity®One only)

Note: All **MaxBilling** agents are automatically created during installation on the first active Agent Server found. You have only one instance of each **MaxBilling** Agent Type created on Relativity® instance. All **MaxBilling** agents must be enabled.

Instance Settings – in RelativityOne only

Once **MaxBilling** is installed ***AccountKey***, ***AccountName*** and ***TableName*** Instance settings (all in Section kCuraDashboard.AzureConnectionSettings) have to be updated.

Note: These instance settings are created during **MaxBilling** installation with default/fake values. During updates these settings are not being changed and it is not needed to repeat the following steps after an update.

The settings are needed for reading the information about the stage fence data size (see ***Stage Fence Data File Size*** billing item in Case Rollup Pricing Items section).

To get the correct values from the Azure Portal do the following:

- **AccountName** - the name of the Storage account where the table used to store Staging Fence Data was created;
- **AccountKey** – the access key of the Storage account where the table used to store Staging Fence Data was created;
- **TableName** - the name of the Azure Table where Staging Fence data is stored.

Note: An additional update of the values will be needed only when/if there is a change for the Account Name, Account Key or Table Name used to store Staging Fence Data.

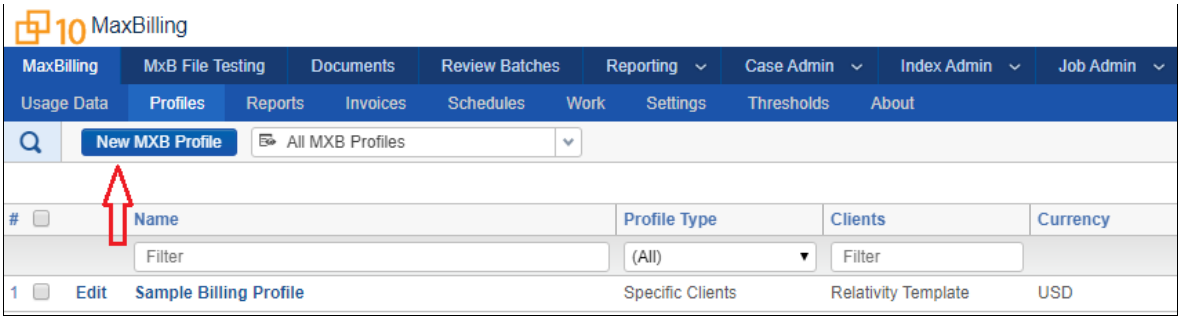
Billing profile

To start the billing process, you need to create a billing profile. **MaxBilling** Profile is the placeholder of your pricing settings. Reports are generated according to the profile information.

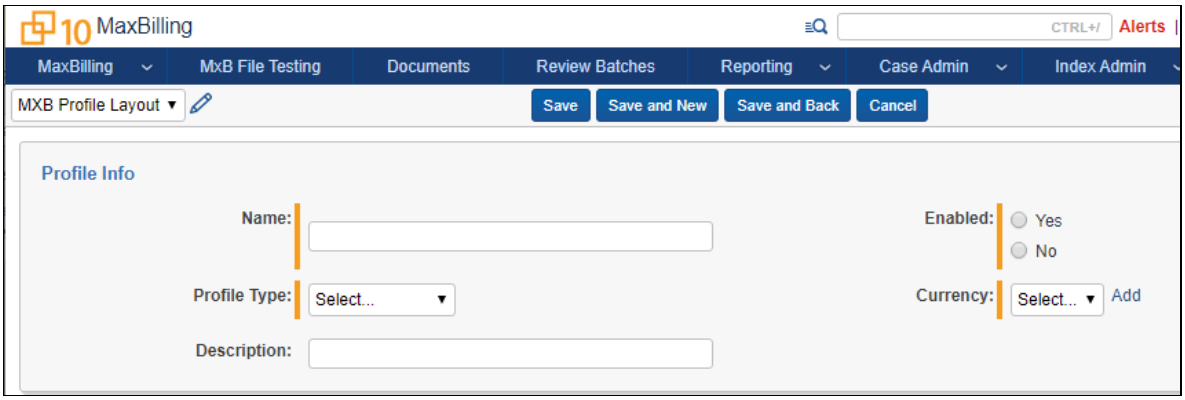
To create a new profile:

1. Navigate to **Profiles** tab.

2. Click **New MXB Profile**. The profile layout opens.
3. Fill in the fields.
4. Click **Save**.



Profile fields



- **Name** - the name you want to give the profile.

  The following symbols are not allowed in a billing profile name: "+", "!", "|", "/", "\\", "[", "]", "\", "&", "<", ">", "{", "}", "%", "^", "~", "@".

- **Profile Type - select** the type of your profile.
  - **All Clients -** includes all Clients within the Relativity® instance. If new clients are being added to Relativity®, they will be included in the billing profile automatically.
  - **Specific Clients -** includes specific Clients selected by you.
  - **Instance Type -** includes all Clients within the Relativity® Instance, providing additional report information options on instance level.
- **Clients** - select the Relativity® clients for the billing profile. (for Specific Clients type of profile)
- **Description -** additional information for this profile can be added. (optional)
- **Enabled -** enable or disable the profile.

Note: Reports are not generated by schedules for profiles, which are disabled.

- **Currency** - select the currency which will be applied to the reports.
- **Report Last Generated Date** - date and time a report for this profile was last generated. (read-only)

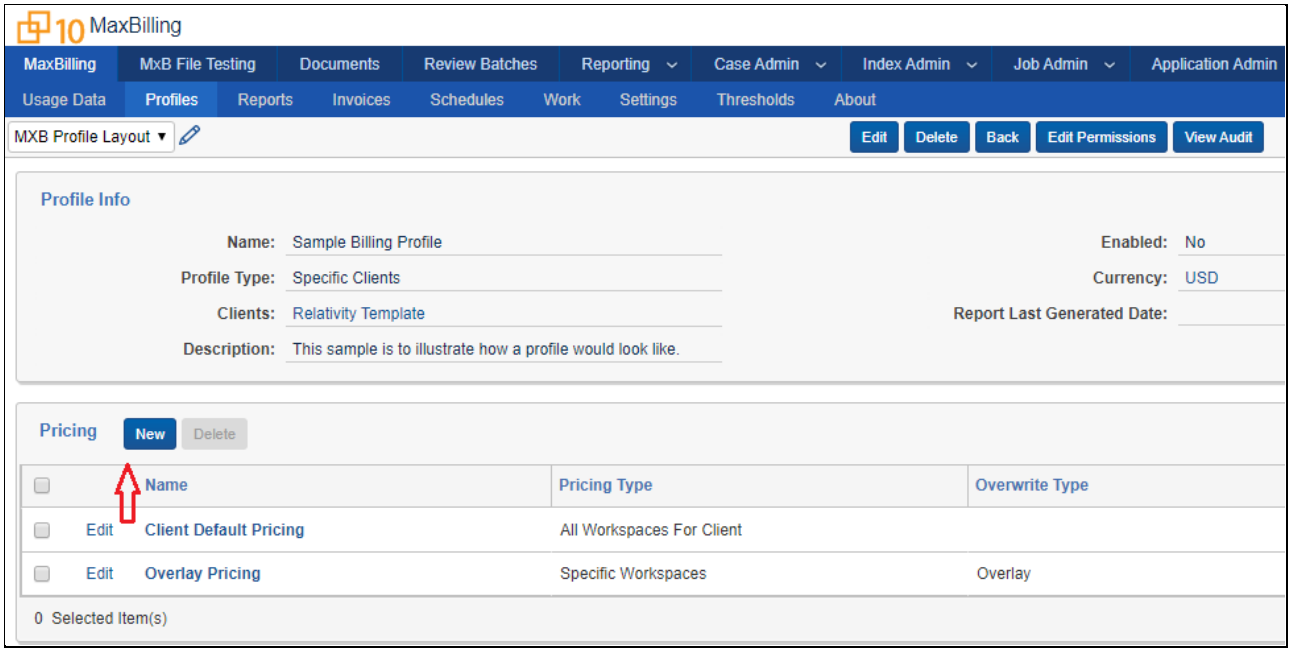
Create pricing

Once a billing profile is created, you should add pricings in it. Billing reports will be generated according to the pricings in the profile.

The pricing information can be edited at any time and the changes will be applied to the reports which will be generated afterwards.

To add a new pricing:

1. Click **New** on the MXB Profile layout. The pricing layout opens.



2. Fill in the following fields:
   - **Name –** type the name of the pricing. The name of the pricing is not shown in the reports.
   - **Pricing Type -** specify the pricing type.
     - **All Workspaces for Client** - all the clients' workspaces are charged according to the rates and metrics specified in that pricing unless any other specific pricings are not created. If a client adds a new workspace, this workspace will be considered automatically by the All Workspaces for Client pricing.

Note: All Workspaces for Client pricing type is the default pricing for the profile. You can set only one **All Workspaces for Client** pricing type per a profile.

- **Specific Workspaces** – this pricing type allows setting individual rates and metrics on a workspace basis.

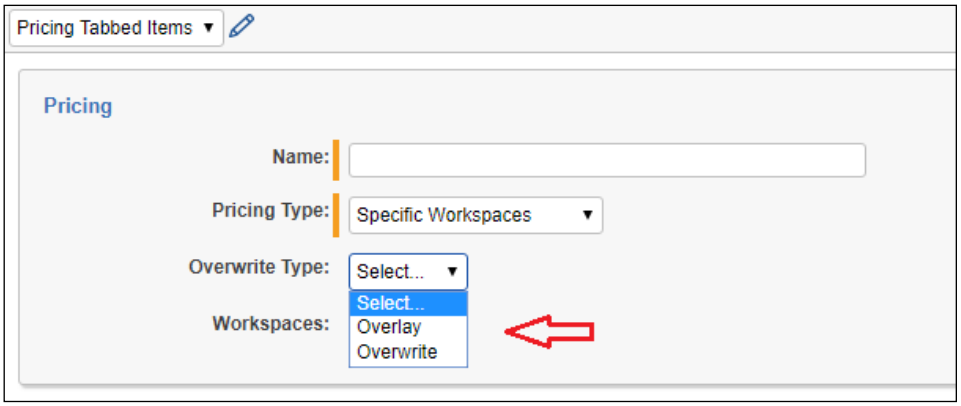
When **Specific Workspaces** pricing type is selected, two more fields appear:

- **Overwrite Type -** defines how the specified rates and metrics are considered against the ones which you set in All Workspaces for Client pricing. It is a single-choice field with the following options:

  - ✓ **Overlay** – appends pricing information for the selected workspaces to the All Workspaces for Client pricing. Rates and metrics, specified in the Overlay pricing will be applied along with the ones, being set in the default pricing.

    If some billing items are present both in the default and in the Overlay pricings, the units and the prices only from the Overlay pricing will be applied.

  - ✓ **Overwrite** - the selected workspaces in an Overwrite pricing are charged only according to the rates and metrics, specified in that pricing. Rates and metrics set in All Workspaces for Client pricing are not considered.



- **Workspaces** – select the workspaces you want to apply the Specific Workspaces

pricing type to.

- **Exclude Workspaces** – you can select multiple workspaces that will not be included in the generated reports and neither of the pricings will be applied to them.

When **Exclude Workspaces** pricing type is selected, one more field appear:

  - **Workspaces** – select the workspaces you want to apply the Exclude Workspaces pricing type to.

- **Minimal Cap -** the minimum workspace cap value will be applied in the reports' total in case the total workspace report value is below the Minimum Workspace Cap value.

- **Maximal Cap -** the maximal workspace cap value will be applied in the reports' total in case the total workspace report value exceeds the Maximal Workspace Cap value.

Add pricing information

In each included pricing, except for pricings of Exclude type, you can add different pricing items in the following categories: **Case Rollup, Case Flow, Analytics, Processing, Users**, **Tasks.**

Note: You can find additional information about all pricing item types for each of the billing categories in Appendix A.

All pricing items have additional information which can be edited by a user - **Friendly Name**, **Billing Code**, **Description, E-Code, Cost Code**. (see Settings section – Pricing Item Types)

When an item is selected, pricing item metadata becomes visible in the layout, as well.

A corresponding **Unit** must be selected when adding a pricing item. The **Unit** will be applied to the pricing item in the report.

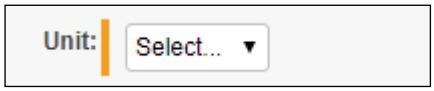
- **Count** - the item will be charged according to its quantity. (applicable for counts)

- **In Whole** - the item will be charged in whole, the total charge will not be dependent on its quantity and the price will not be multiplied by the usage amount. (applicable for counts)

Note: **In Whole** unit is calculated per each workspace if there is some usage for the specific item.

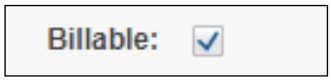
- **TB -** the item will be charged according to its usage in TB. (applicable for sizes)

- **GB** - the item will be charged according to its usage in GB. (applicable for sizes)
- **MB** - the item will be charged according to its usage in MB. (applicable for sizes)



Each billing item can be set as billable or non-billable in the report depending on if **Billable** field is ticked or not.

- - item will be considered as billable in the report meaning that the item will be included in the reports with its usage along with the corresponding calculations according to the price and discount.
- - **Unit Price** and **Discount** fields will not be present and the item will be included in the reports only with its usage.



Price Type field is available for all billable items (except for **Tasks** billing category).

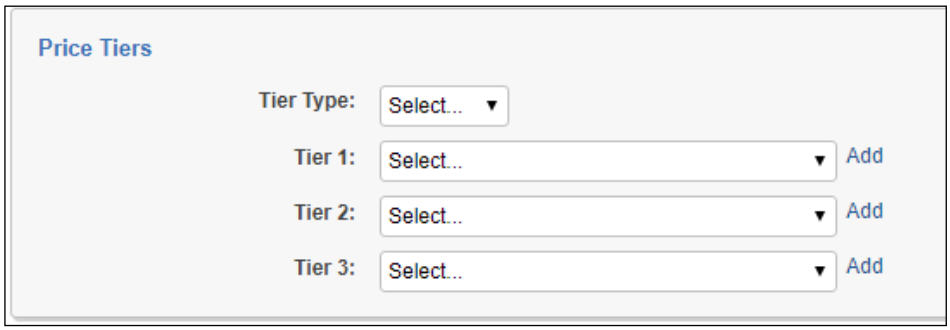
Select **Price Type** value:

- **Single Price** – when selected, the Unit Price value will be applied.
- **Tiered Price –** when selected, an additional section **Price Tiers** appears:

The tiered price functionality allows setting up to 3 thresholds for each billing item and charging according to the items' usage, by using different prices for each threshold (tier).

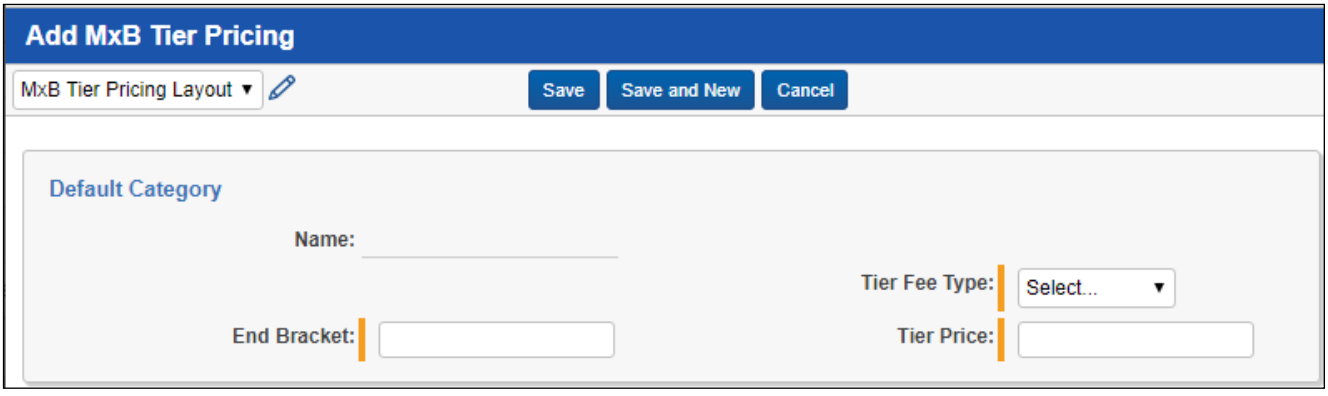
- **Select Tier Type:**
  - **Exclusive** – the item will be charged according to the price tier in which its usage amount fits in.
  - **Inclusive** – the item's usage will be distributed among the tiers and each part of the

usage will be charged according to the price in the corresponding tier.



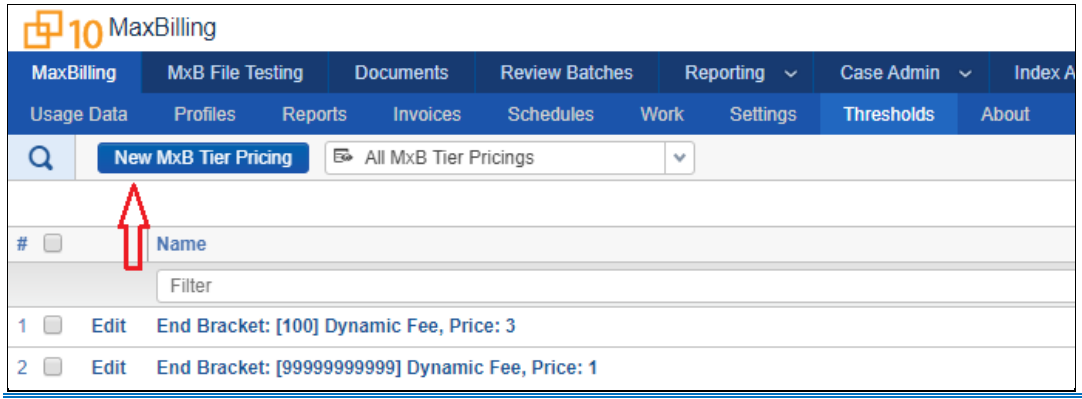
- **Add a Tier:**
  - **Name** – the field is read only. The Tier Name will be automatically generated when the Tier is saved. It consists of the End Bracket value + Tier Fee Type + Tier Price.
  - **End Bracket** – the value specifies the end of the bracket. This is the usage amount value up to which the corresponding price will be applied.
  - Select **Tier Fee Type:**
    - ✓ **Flat Fee** – when selected, the price, specified in the tier, will be applied as in whole, without multiplying it by the usage amount, which fits in the tier.
    - ✓ **Dynamic Fee**– when selected, the price, specified in the tier, will be multiplied by the usage amount, which fits in the tier.
  - **Tier Price** – the price that will be applied for the tier.

Note: You can select from previously added tiers or you can add a new one ad-hoc by clicking on the **Add** hyperlink.



Note: The **End Bracket** of the last Tier Pricing must always be 9999999999.

Note: All Price Tiers can be reviewed under **Thresholds** tab in MaxBilling. You can add new Price Tiers by clicking **New MxB Tier Pricing** button.



Note: When the **Tiered Price** option for **Price Type** is selected, the **Unit Price** field remains required, although it will not be applied. You can set it with 0.00 or any value.

Note: When the **Tiered Price** option for **Price Type** is selected, the **Discount** field will not be applied in the reports.

Note: The **Price Tiers** are being applied workspace by workspace. Therefore all reports calculations are performed on a workspace basis, when **Price Tiers** are used.

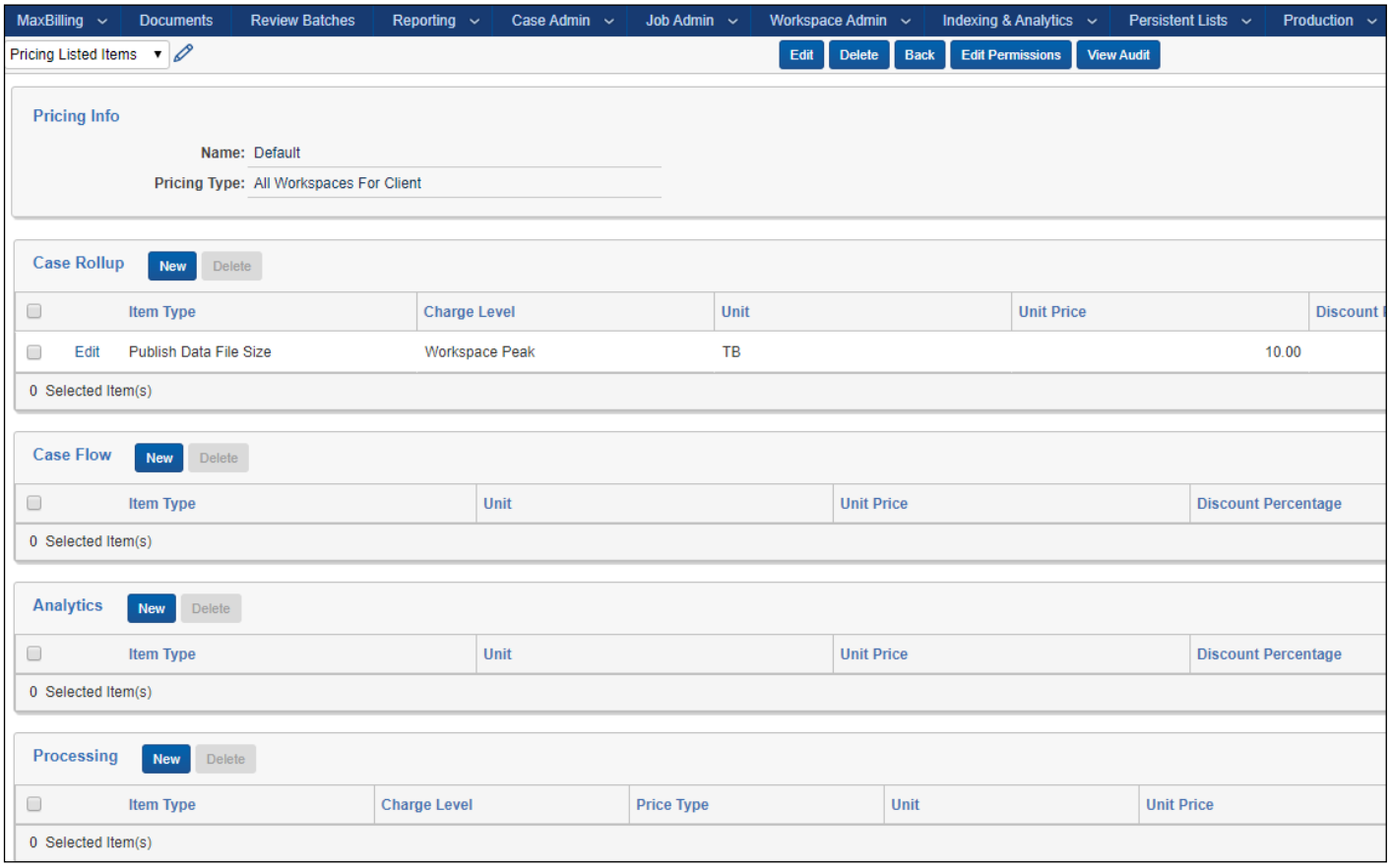
E.g. If you have set a tier from 0 to 10 GB with a price 5 for a specific billing item, the first 10 GB of this item from each Workspace will be charged by price 5

Two layouts are available for adding pricing - *Listed* and *Tabbed*.

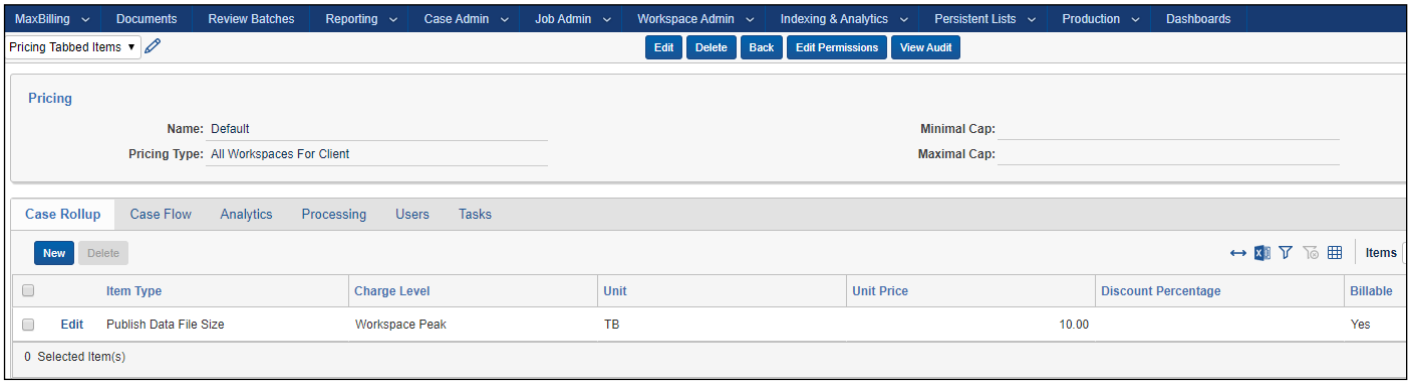
In *Pricing Listed Items* layout all pricings are present in list.

In Pricing Tabbed Items layout contains a separate tab for each category.

Pricing Listed items layout:



Pricing Tabbed items layout:



Case Rollup category

The items in **Case Rollup** category refer to the hosting size and the calculated usage is based on their peak value within the reported period.

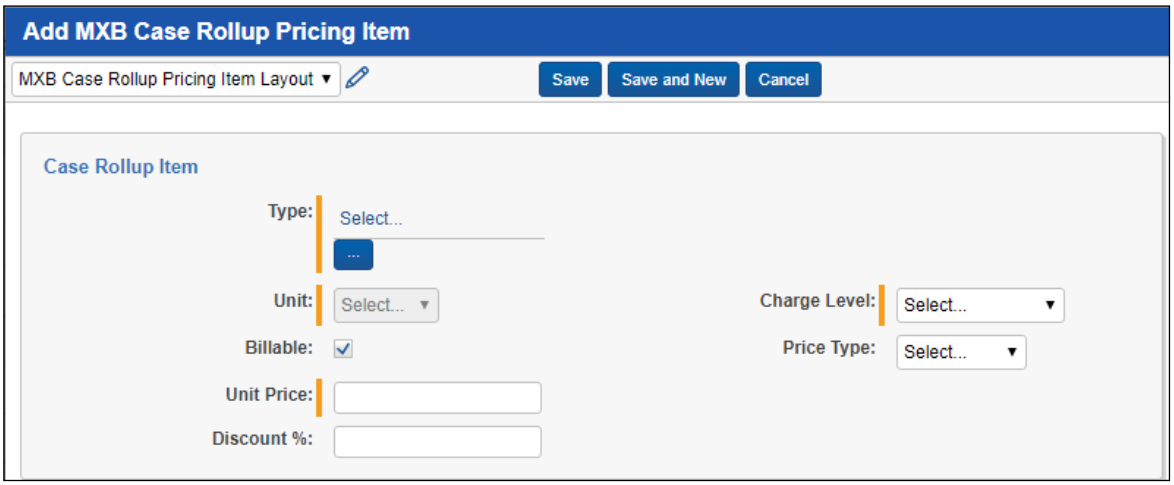
To add a new pricing item to **Case Rollup** category:

1. Navigate to **Case Rollup** category.
2. Click **New**.
3. Fill in the following fields:
    - **Type** – select an item from the list.

- **Unit** – select a unit which will be applied to the pricing type in the report.
- Select whether the item to be considered as **Billable** in the report.
- Enter a **Unit Price** to set the single price for pricing unit.
- Enter a **Discount %** to set discount for the item. (optional)
- Select a **Charge level**:
    - **Workspace Peak** - shows the highest usage for each Workspace within the billing period. (this value could be taken from different dates, within the reported period, for each workspace)
    - **Matter Peak** - shows the usage for each Workspace from the date when was the highest sum of the item usage for the Matter which this Workspace belongs to. The date represents the peak daily usage on a matter level for the reported period.
    - **Client Peak** - shows the usage for each Workspace from the date when was the highest sum of the item usage for the Client which this Workspace belongs to. The date represents the peak daily usage on a client level for the reported period.
    - **Instance Peak** - shows the usage for each Workspace from the date when was the highest sum of the item usage for the whole Relativity instance. The date represents the peak daily usage on an instance level for the report period.
    - **Current Value** – shows the usage for each Workspace as it was on the last day of the reported period.

Note: You can add up to two entries for each Case Rollup billing item per Pricing - one with a Peak charge level (Workspace Peak, Matter Peak, Client Peak, Instance Peak) and another one with a Current Value charge level.

- Select a **Price Type**.

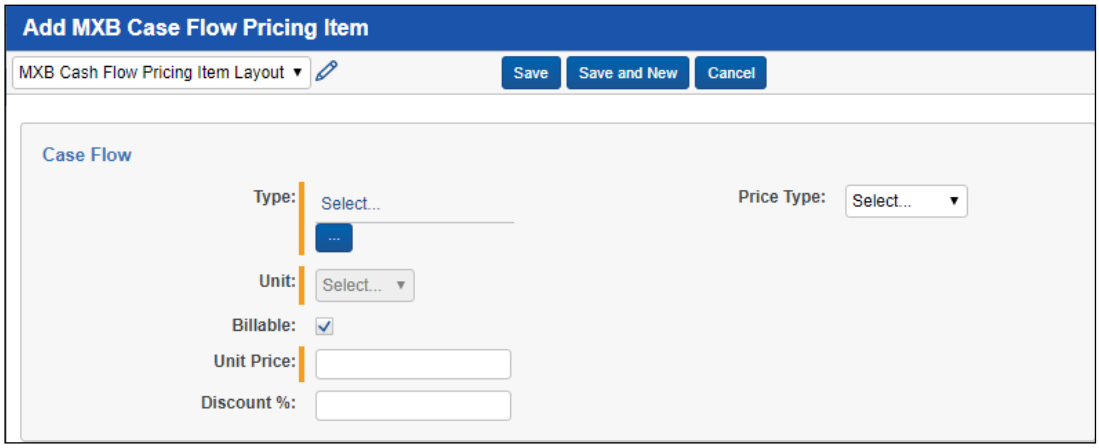


Case Flow category

The items in **Case Flow** category represent the total usage (sum of the size or counts) within the reported period.

To add a new pricing item to **Case Flow** category:

1. Navigate to **Case Flow** category.
2. Click **New**.
3. Fill in the following fields:
   - **Type** – select an item from the list.
   - **Unit** – select a unit which will be applied to the pricing type in the report.
   - Select whether the item to be considered as **Billable** in the report.
   - Enter a **Unit Price** to set the single price for pricing unit.
   - Enter a **Discount %** to set discount for the item. (optional)
   - Select a **Price Type**.



Analytics category

The items in **Analytics** category are being calculated based on the workspace peak value within the reported period, except for *CA Index Size On Disc* pricing item, which reperesents the sum of the size for the reported period.

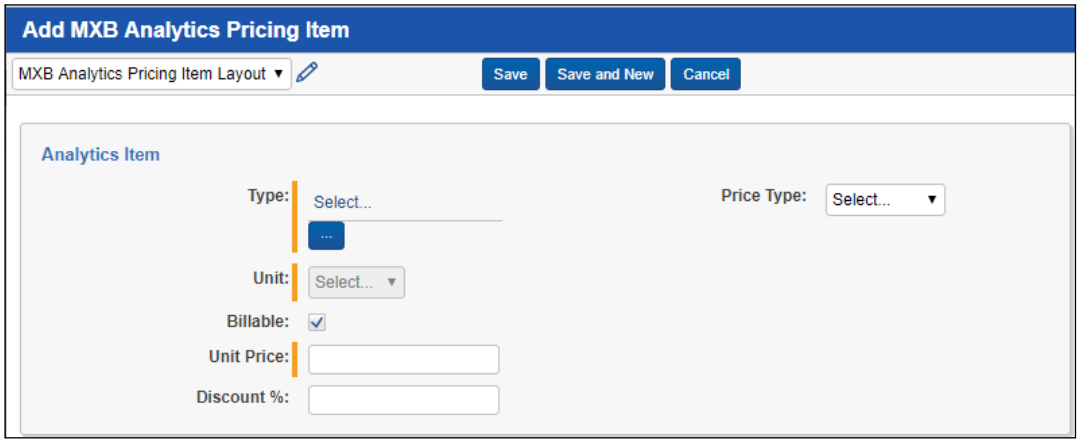
Note: CA Index Size On Disc pricing item is not supported in Relativity® 9.7 and above.

To add a new pricing item to **Analytics** category:

1. Navigate to **Analytics** category.
2. Click **New**.

3. Fill in the following fields:

   - **Type** – select an item from the list.
   - **Unit** – select a unit which will be applied to the pricing type in the report.
   - Select whether the item to be considered as **Billable** in the report.
   - Enter a **Unit Price** to set the single price for pricing unit.
   - Enter a **Discount %** to set discount for the item. (optional)
   - Select a **Price Type**.



Processing category

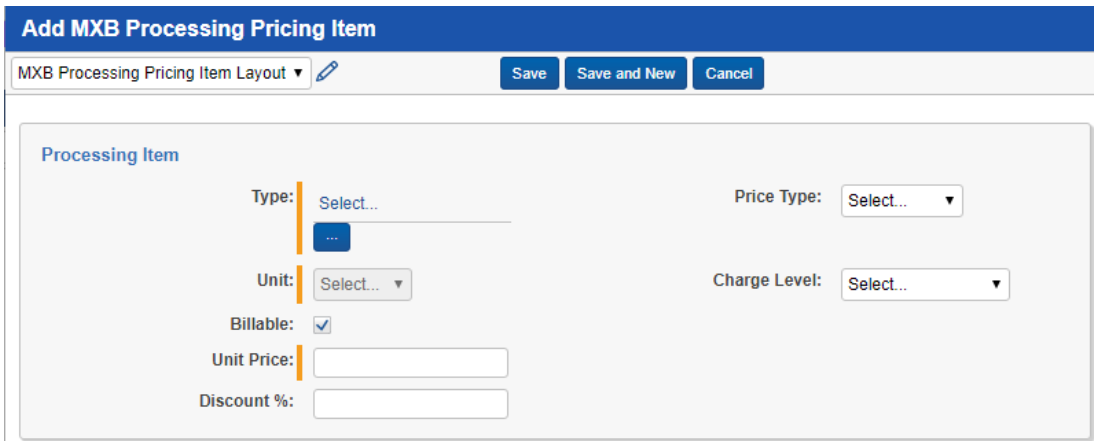
The items in **Processing** category represent the total usage (sum of the size or count) within the reported period, considering all Published or Published with errors Processing Sets.

To add a new pricing item to Processing category:

1. Navigate to **Processing** category.
2. Click **New**.
3. Fill in the following fields:

   - **Type** – select an item from the list.
   - **Unit** – select a unit which will be applied to the pricing type in the report.
   - Select whether the item to be considered as **Billable** in the report.
   - Enter a **Unit Price** to set the single price for pricing unit.
   - Enter a **Discount %** to set discount for the item. (optional)
   - Select a **Price Type**.

- Select **Charge Level** – ***All Sets Combined*** or ***Per Set***. The Charge level determines how detailed the processing information will be shown in the reports. ***All Sets Combined*** shows the processing billing information on a workspace level. ***Per Set*** shows more detailed processing billing information on a Processing Set level.



Note: Processing Charge Level ***Per Set*** cannot be used with Price Type **Tiered Price**.

Note: Items with Processing Charge Level ***Per Set*** will not be included in invoices generated with **Individual Report/Pricing items** type of template.

Note: All Processing billing items should have the same charge level within a billing profile – either ***All Sets Combined***, or ***Per Set***.

Users category

The items in **Users** category allow you to charge users for access or logging in during the reported period.

To add a new pricing item to **Users** category:

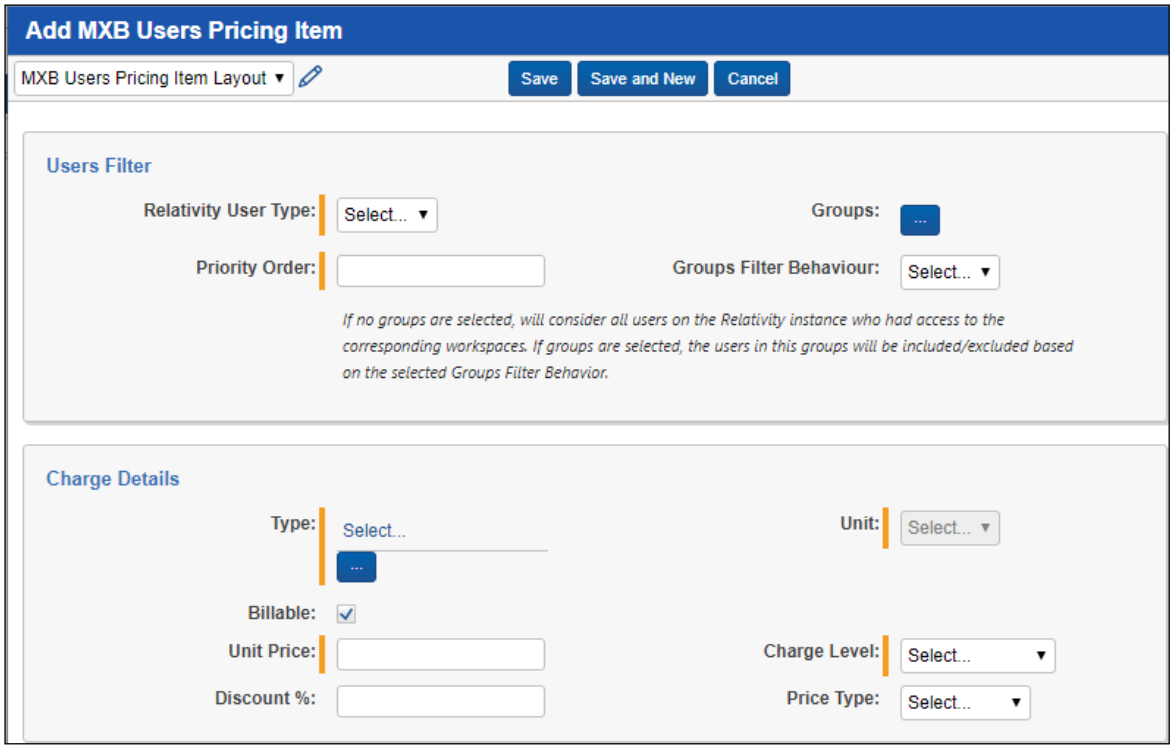
1. Navigate to **Users** category.
2. Click **New**.
3. Fill in the following fields:
   - **Relativity User Type** - select the type of the Relativity® users to charge - *Any, External* or *Internal*.
   - **Priority Order** - if a user is part of more than one charge, he will be charged based on the highest priority (0 is considered the highest). User Charge Priority Order allows multiple user charges in one Pricing.

Note: All Priority Order values should be unique on a Billing Item Type (User Charge - Logged In / User Charge – Had Access) within a Pricing.

- **Groups** – an option to filter further the users who will be charged. All users who are members of the selected group(s) will be charged accordingly.
- **Groups Filter Behavior -** If some groups are selected, the users in this groups will be included/excluded based on the selected behavior.
- **Type** – select an item from the list:
  - **User Charge - logged in** - users will be charged if they had logged in during the reported period.
  - **User Charge - had access** - users will be charged if they had their access enabled.
- **Unit** – select a unit which will be applied to the pricing type in the report.
- Select whether the item to be considered as **Billable** in the report.
- Enter a **Unit Price** to set the single price for pricing unit.
- Enter a **Discount %** to set discount for the item. (optional)
- **Charge Level** - select the charge level - *Workspace*, *Matter* or *Client*. The charge level determines if the users will be charged for each Workspace they have access to, or for each Matter (based on users' access to the Workspaces, belonging to a Matter), or for a Client (based on users' access to the Workspaces, belonging to a Client).

Note: When Matter/Client charge level is selected, the sum of the users' charge will be considered in the total of the first Workspace, belonging to the corresponding Matter/Client.

- Select a **Price Type**.

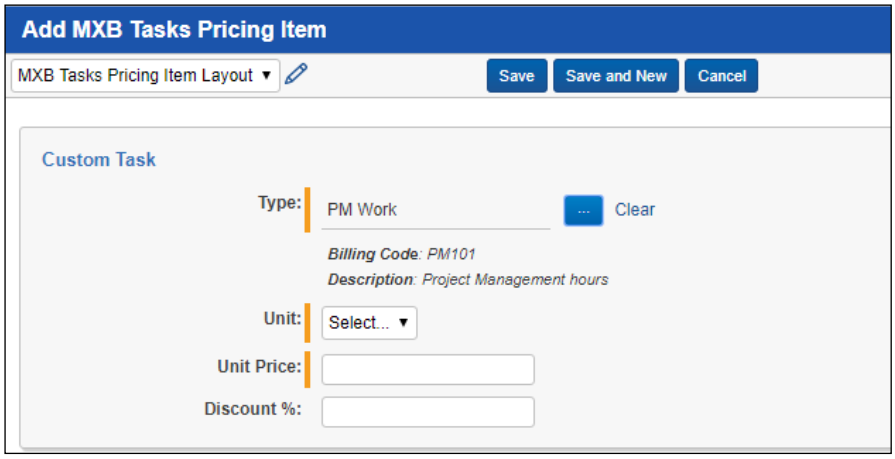


Tasks category

The **Tasks** category allows you to add either custom items, predefined by you in MaxBilling Settings, or a static one line item.

To add a new custom item, predefined by you, to **Tasks** category:

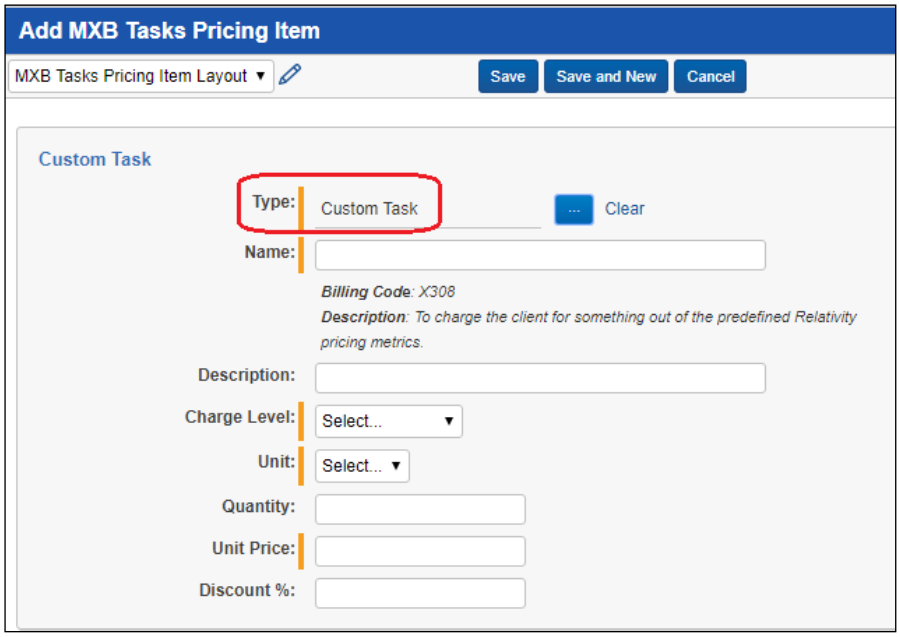
1. Navigate to **Tasks** category.
2. Click **New**.
3. Fill in the following fields:
   - **Type** – select form your predefined custom tasks.
   - Select **Unit**.
   - Enter a **Unit Price** to set the single price for pricing unit.
   - Enter a **Discount %** to set discount for the item. (optional)



To add a new static item to **Tasks** category:

1. Navigate to **Tasks** category.
2. Click **New**.
3. Fill in the following fields:

   - **Name** – to provide information for the task.
   - **Type** – select *Custom Task*.
   - **Description** – to provide additional information for the task.
   - **Charge Level** – select the charge level - *Workspace*, *Matter* or *Client*. The charge level determines if the task will be calculated for each workspace, or for each matter, or for a client within the reported period.
   - **Unit** – select *Count*.
   - **Quantity** – static value which will be multiplied by the unit price.
   - Enter a **Unit Price** to set the single price for pricing unit.
   - Enter a **Discount %** to set discount for the item. (optional)

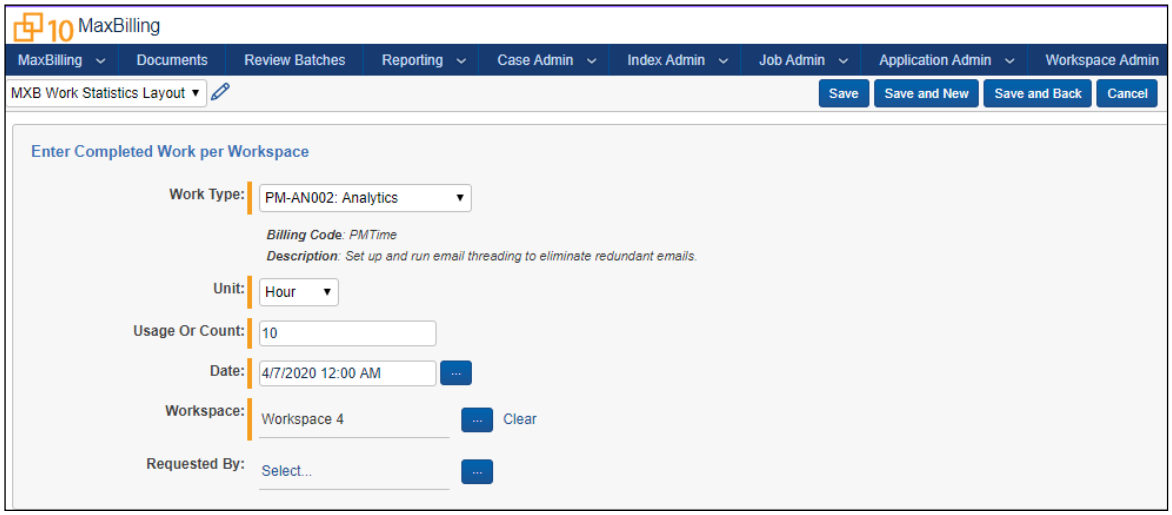


Add statistics about the custom tasks

To add some statistics about your custom tasks, navigate to ***Work*** tab and click ***New*** button.

Fill in the fields in ***MXB Work Statistics*** Layout:

- **Work Type** – select the custom task which you want to add statistics for (required)
- **Unit** – select the unit which is to be considered for report calculation (required)
- **Usage or Count** – type the quantity which is to be considered for report calculation (required)
- **Date** – select the date for which this statistics item will be considered (required)
- **Workspace** – select the Workspace for which this statistics item will be considered (required)
- **Requested by** – select a user from the users with enabled access to the corresponding Workspace above. (optional)

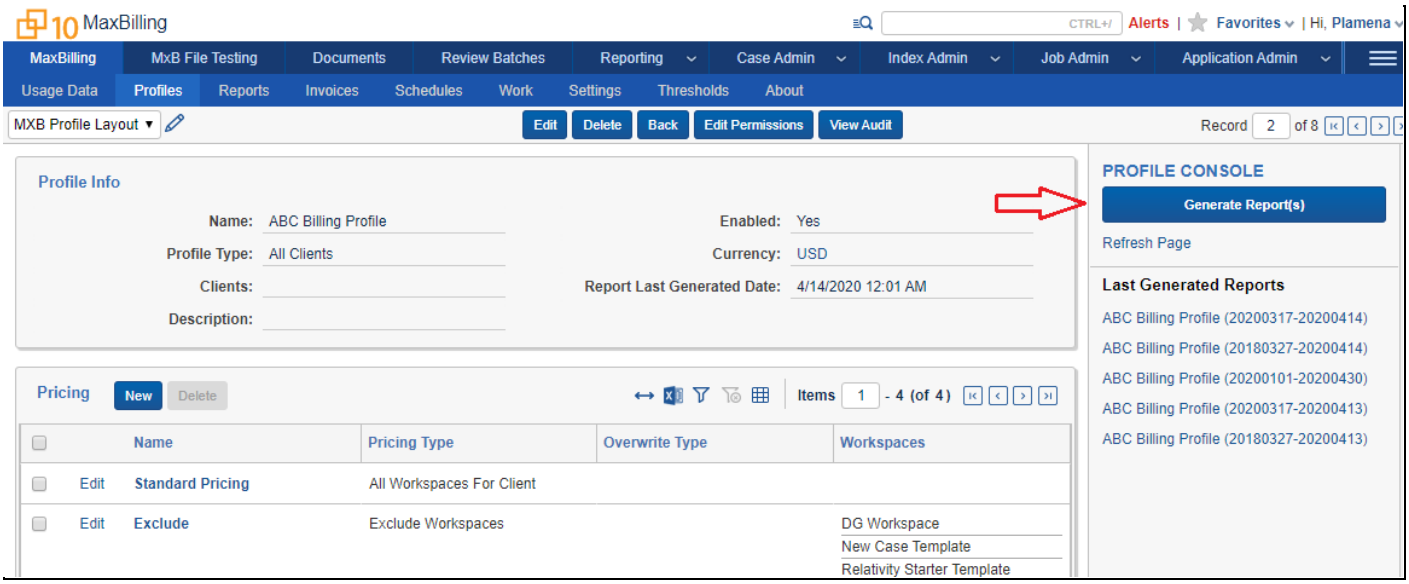


Reports

The billing reports can be generated either manually, or automatically - by setting schedules. (see Scheduler section)

Once you generate a report, using the options in the Report Console, you can download the report as a zip file, containing Excel and PDF files, send this zip file via email or generate invoices based on the report. (see Download Report Files, Send Report files and Invoicing sections)

Generate reports from a profile



To generate a report:

1. Click **Generate Report(s)** in the Profile console.
2. Select a **Report Type**:
   - **One aggregated report for all clients on the profile** - generates one single report for all the Clients in the Profile.

- **Separate reports for each client on the profile** - generates separate Single-client reports for every client included in the profile.

- **One aggregated report for the whole Relativity instance** - generates a single report for all the clients in the Relativity® instance. This report type is applicable only for profiles of **Instance** type.

3. Enter the **Start Date** and **End Date** for the report.

4. Select **Included Report Items** – the report breakdown specifies how the report information will be aggregated - by Workspaces, Matters, Clients or Instance. Breakdown by Instance is applicable only for Instance Type reports.

5. Select a **Logo** that will be added in the generated PDF report. (optional)

6. Type Email Recipients. (optional)

7. Select **Consider Repository Workspace** - when this option is selected, the Repository workspaces' usage will be recalculated and it will be counted as 1/3 in **MaxBilling** reports. Additionally, " --- Repository" tag will be shown next to workspaces' names.When the option is not selected, all Workspaces will be considered as regular ones.

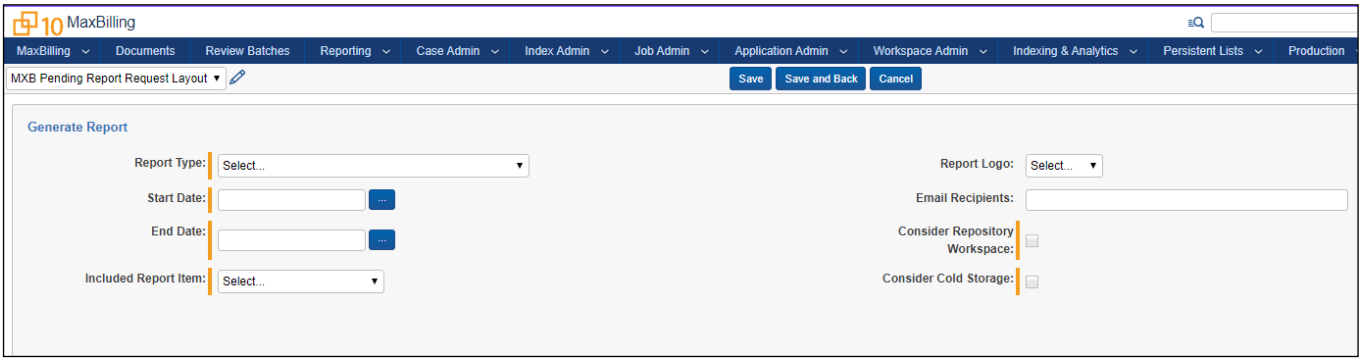
8. Select **Consider Cold Storage** - when this option is selected, the Cold Storage workspaces' usage will be recalculated and it will be counted as 1/4 in **MaxBilling** reports. Additionally, " --- Cold Storage" tag will be shown next to workspaces' names. When the option is not selected, all workspaces will be considered as regular ones.

Note: The calculations regarding Repository Workspaces and Cold Storage Workspaces refer only to the billing items under Case Rollup pricing category in MaxBilling, except for Stage Fence Data File Size (see Case Rollup items in Case Rollup pricing items description).

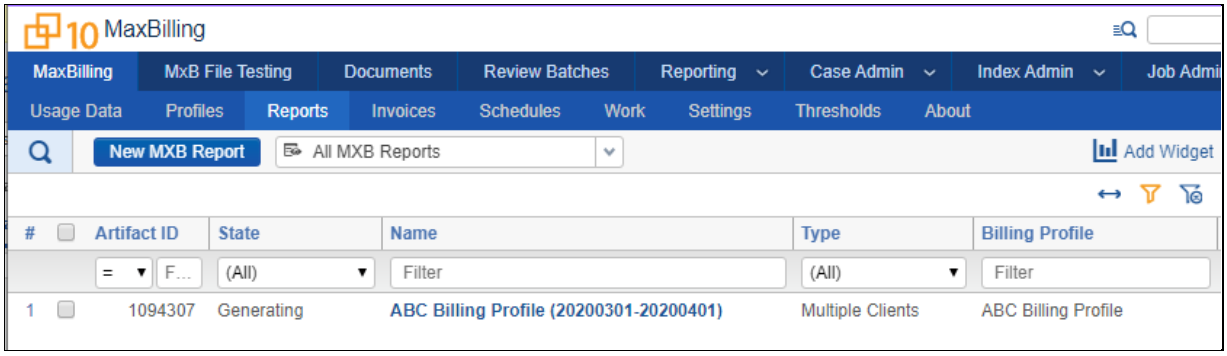
For MaxBilling reporting purposes, a workspace is considered as a Repository when the "Repository Workspace" Application was in installed status on this workspace for each day during the reported period.

For MaxBilling reporting purposes, a workspace is considered as a Cold Storage when it was in Cold Storage status for each day during the reported period.

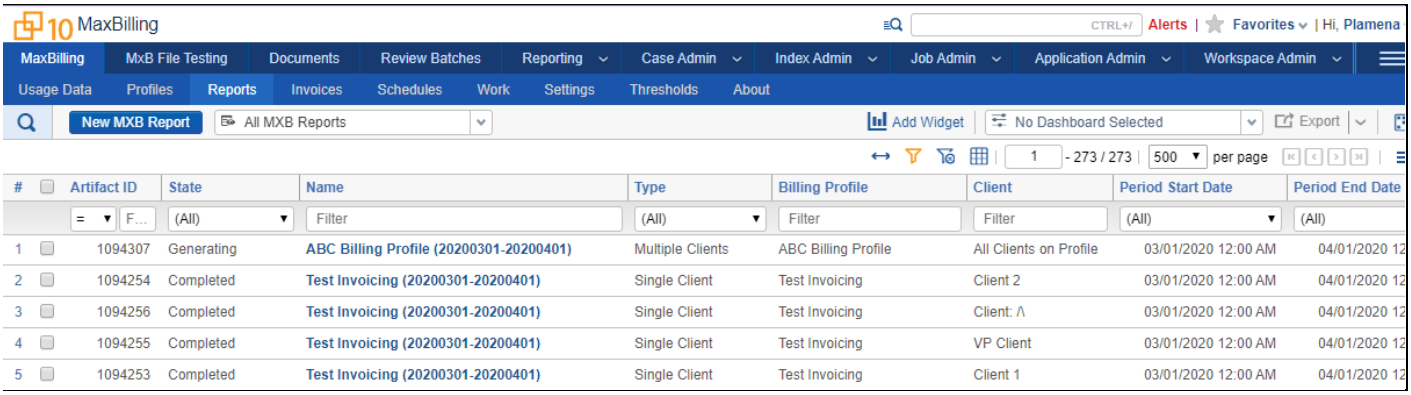
Note that these statuses can be considered differently on a monthly basis, depending on specific client limitations determined by Relativity®.



9. **Save**. A report generation request is created and will be processed by an agent.



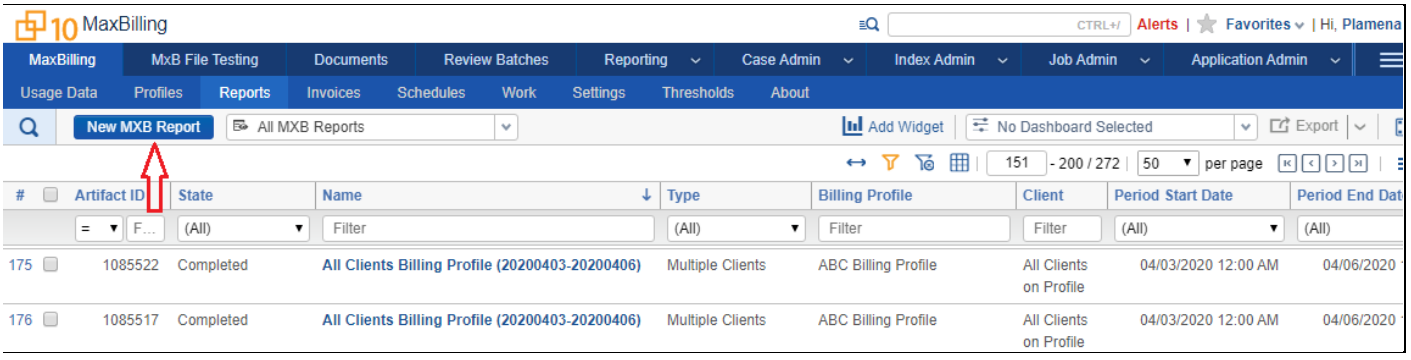
All generated reports are listed under the **Reports** tab. The view includes general information for all reports. To review the detailed information for a specific report, click its name to open it.



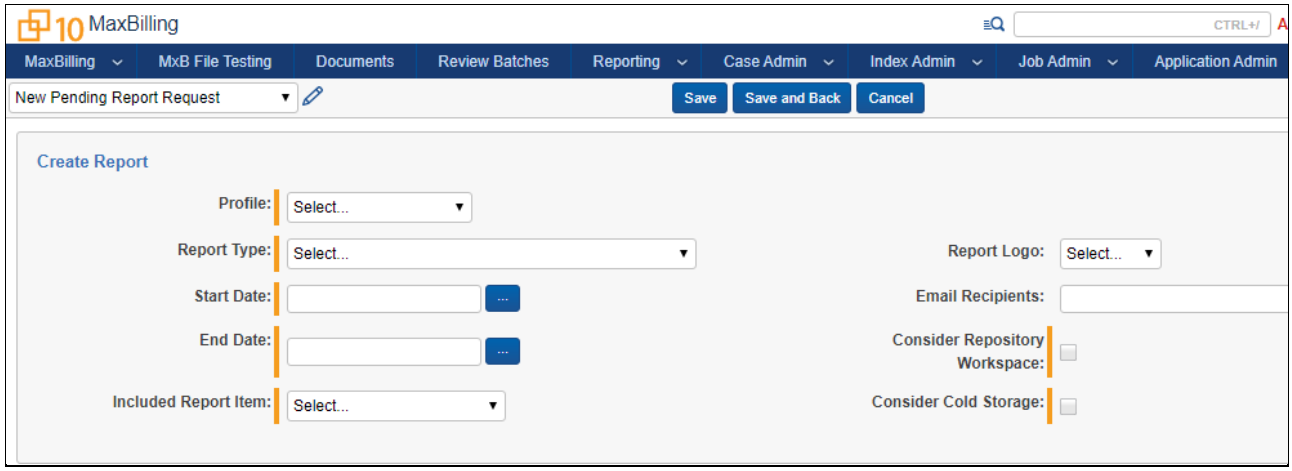
Generate reports from Reports tab

To generate a report:

1. Click **New MXB Report** under **Reports** tab.



2. Select **Profile**.

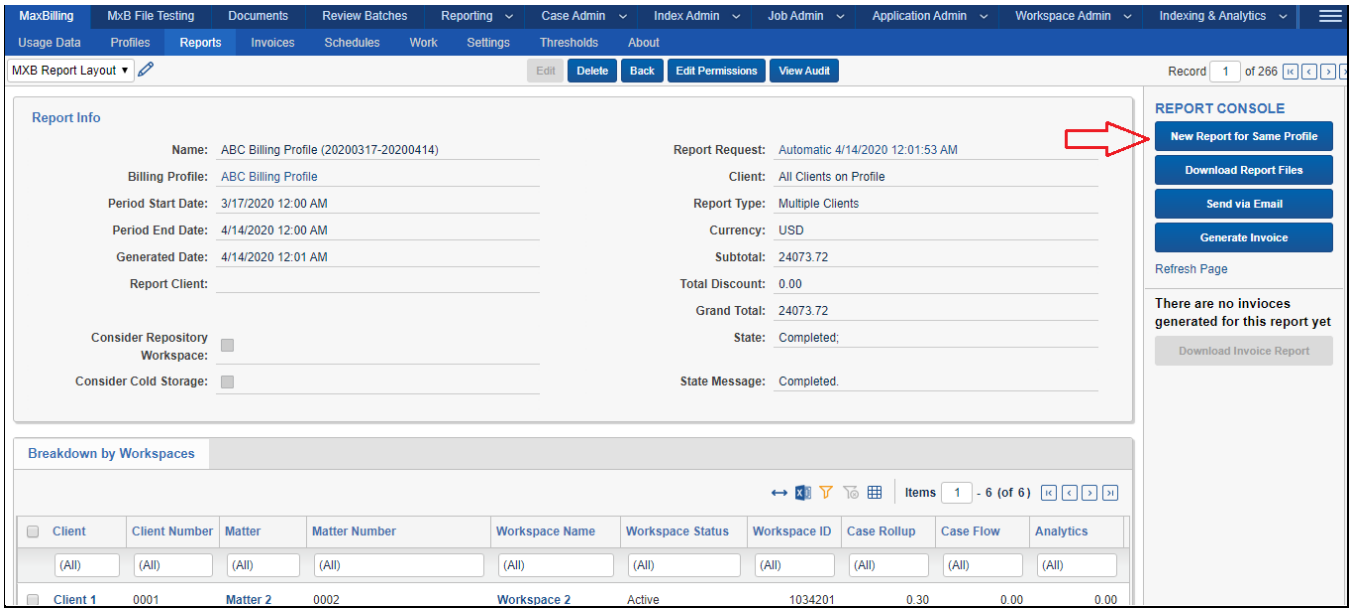


3. Repeat the steps described in Generate reports from a profile section.

Generate reports from another report

To create a new report from another report:

1. Click **New Report for Same Profile** button in the report console.



2. Repeat the steps described in Generate reports from a profile section.

Report information

The following information is provided for each report:

Name – the name of the report consists of the profile name and the reported period.

Billing Profile – the profile which refer to the report

Period Start Date – the beginning of the reported period.

Period End Date – the end of the reported period.

Generated Date – the time when the report is generated.

Consider Repository Workspace – shows if the option was selected on the report generation.

Consider Cold Storage – shows if the option was selected on the report generation.

Report Request – shows details about the report generation request.

Client – the client name.

Report Type – the report type.

Currency – currency which is set in the billing profile.

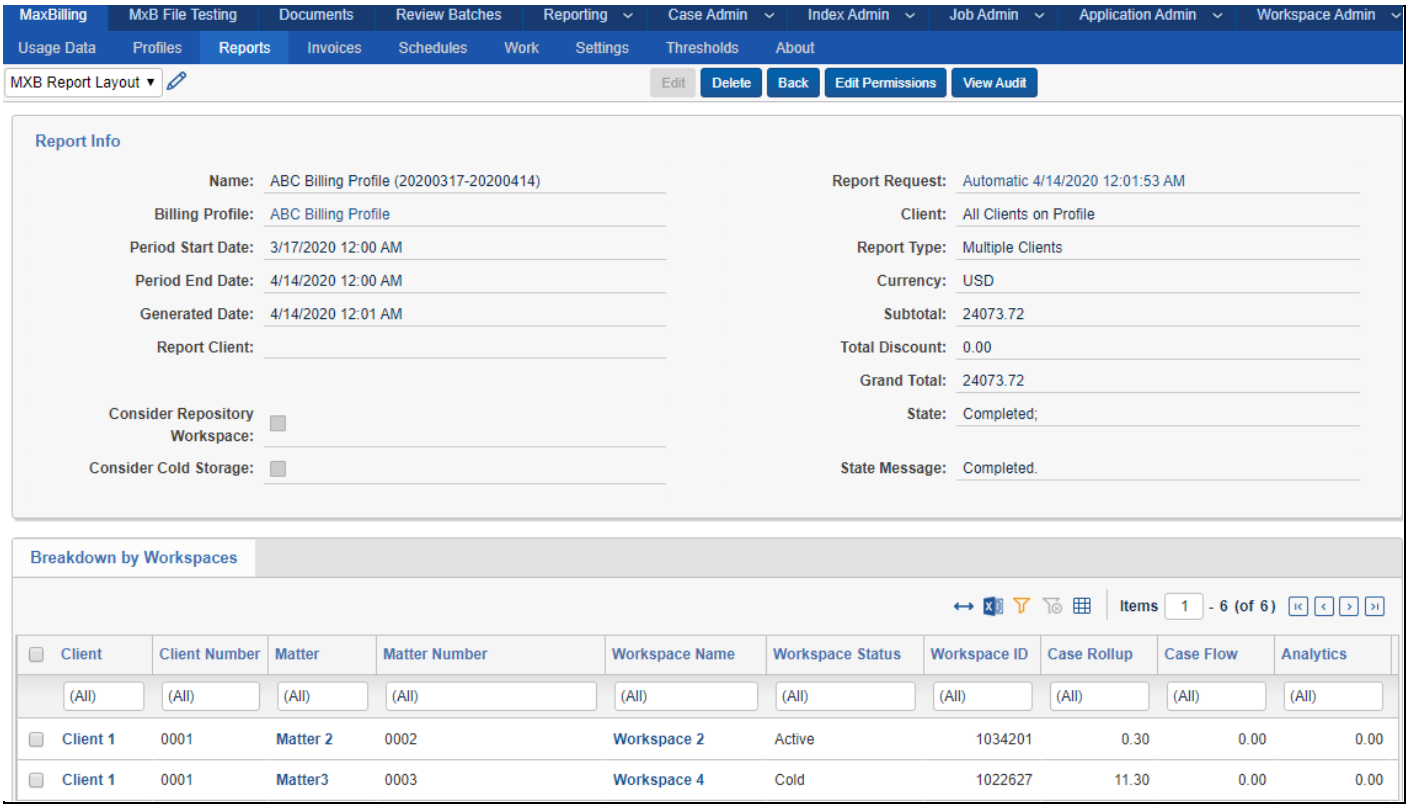
Subtotal – the sum of all billing items.

Total Discount – the sum of all discounts.

Grand Total – the difference between subtotal and discount.

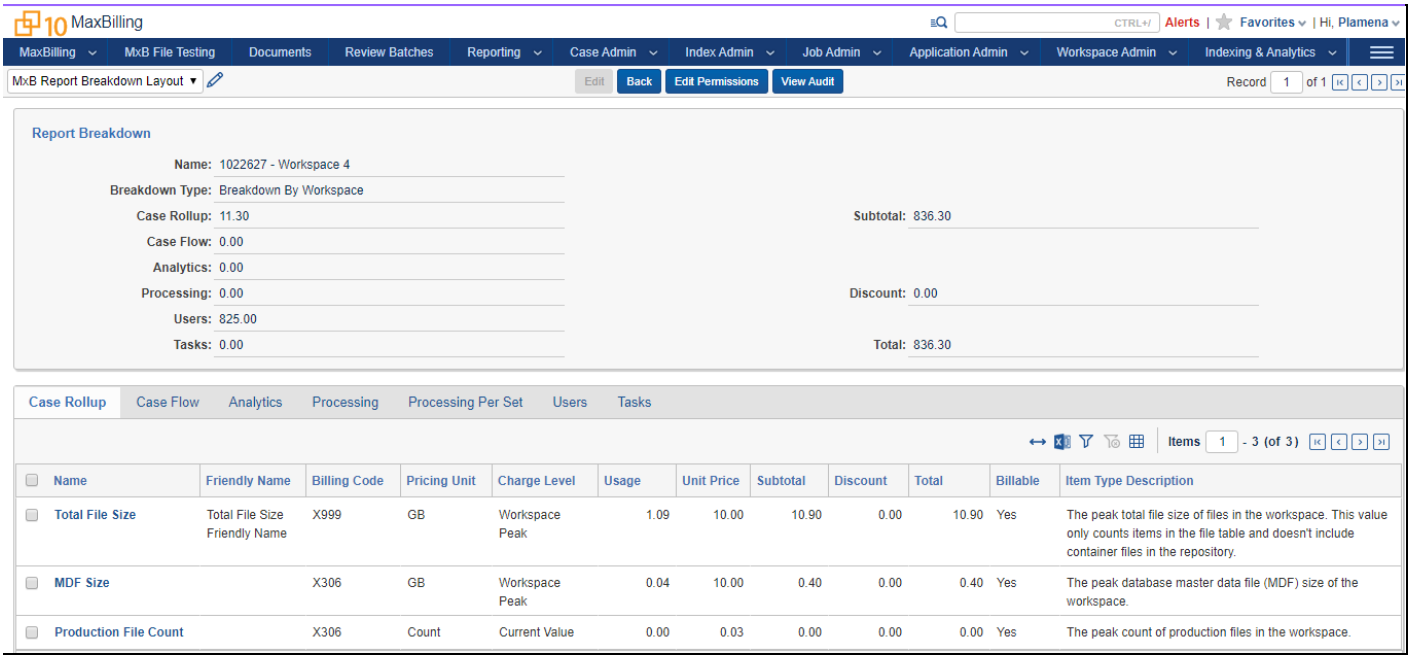
State – the state of the report.

State message – additional information referring to the report's state.



For more detailed information about the billing items of all categories, click the name of the Workspace, Matter, Client or Instance in the report breakdowns. The report information is distributed under the billing

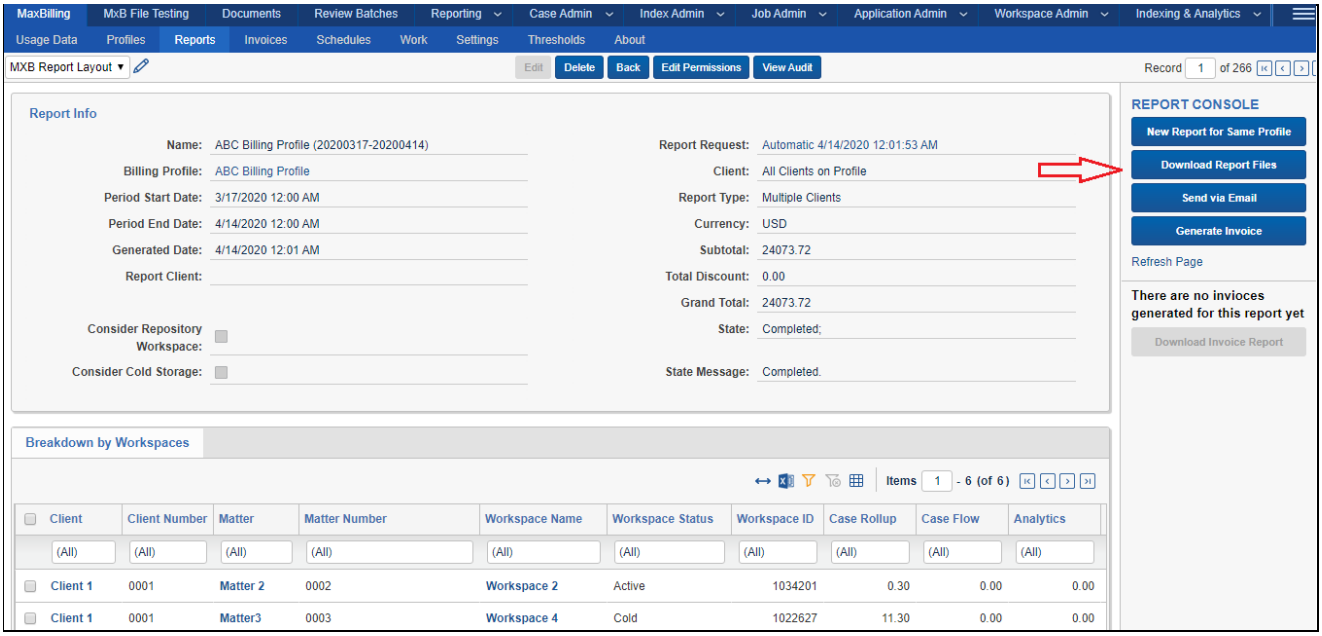
categories.



Download Report Files

To download the report files:

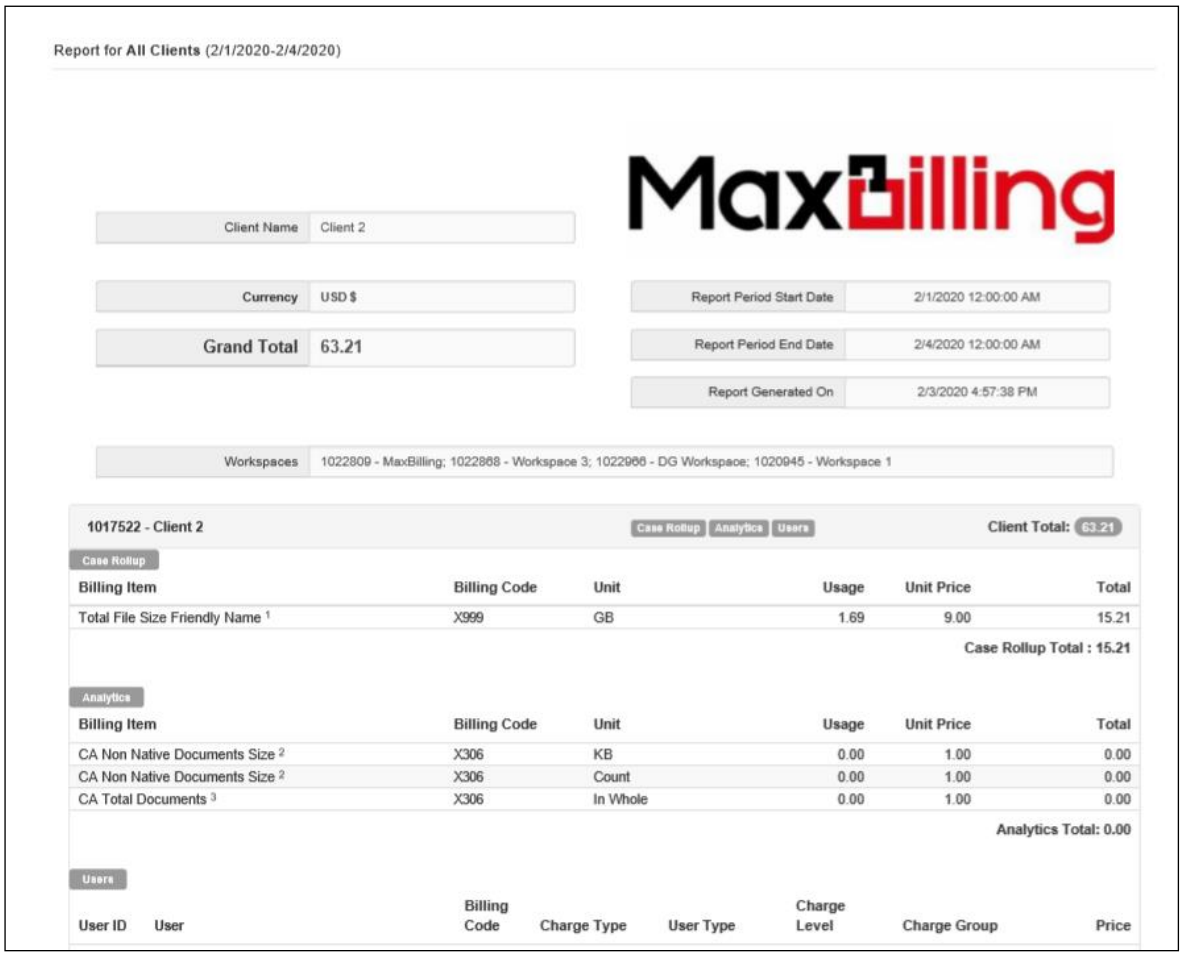
1. Click **Download Report Files** in the report console.



A zip file containing Excel and PDF files containing the corresponding billing information is downloaded.

Note: PDF report file is available for Single Client and Instance type of reports only.

- **Report Summary (Client Breakdown).pdf** – the file includes report information on a single client basis.



Report for **All Clients** (2/1/2020-2/4/2020)

MaxBilling

Client Name	Client 2
Currency	USD $
Grand Total	63.21
Report Period Start Date	2/1/2020 12:00:00 AM
Report Period End Date	2/4/2020 12:00:00 AM
Report Generated On	2/3/2020 4:57:38 PM
Workspaces	1022809 - MaxBilling; 1022868 - Workspace 3; 1022966 - DG Workspace; 1020945 - Workspace 1

1017522 - Client 2 — Case Rollup | Analytics | Users — **Client Total: 63.21**

Case Rollup

Billing Item	Billing Code	Unit	Usage	Unit Price	Total
Total File Size Friendly Name [1]	X999	GB	1.69	9.00	15.21

Case Rollup Total : 15.21

Analytics

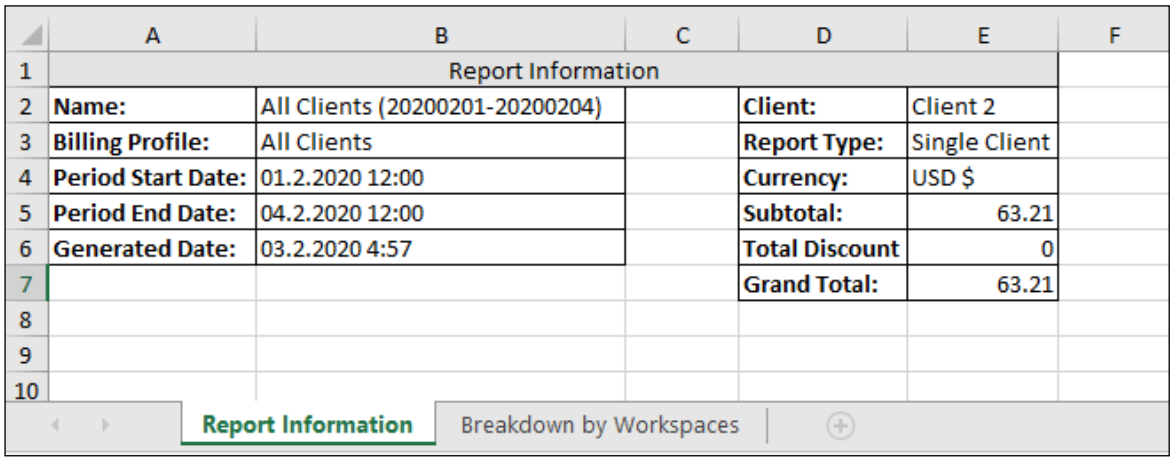
Billing Item	Billing Code	Unit	Usage	Unit Price	Total
CA Non Native Documents Size [2]	X306	KB	0.00	1.00	0.00
CA Non Native Documents Size [2]	X306	Count	0.00	1.00	0.00
CA Total Documents [3]	X306	In Whole	0.00	1.00	0.00

Analytics Total: 0.00

Users

User ID	User	Billing Code	Charge Type	User Type	Charge Level	Charge Group	Price

- **Report Summary (Workspace Breakdown).xlsx –** the file contains summarized report information on a workspace basis.
    - *Report Information tab* – this tab contains the report general information.

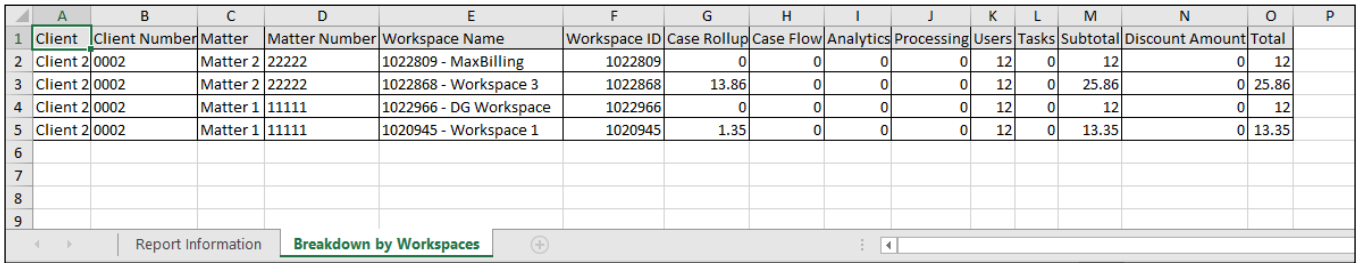


	A	B	C	D	E	F
1	Report Information					
2	**Name:**	All Clients (20200201-20200204)		**Client:**	Client 2	
3	**Billing Profile:**	All Clients		**Report Type:**	Single Client	
4	**Period Start Date:**	01.2.2020 12:00		**Currency:**	USD $	
5	**Period End Date:**	04.2.2020 12:00		**Subtotal:**	63.21	
6	**Generated Date:**	03.2.2020 4:57		**Total Discount**	0	
7				**Grand Total:**	63.21	
8						
9						
10						

Report Information | Breakdown by Workspaces

    - *Breakdown by Workspaces tab* – this tab shows the totals based on billing categories

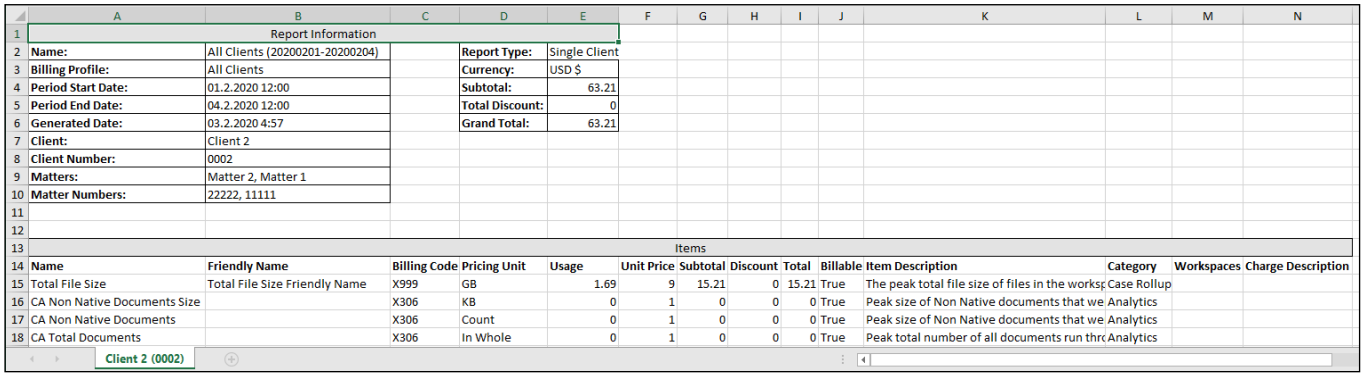
for each workspace.



Client	Client Number	Matter	Matter Number	Workspace Name	Workspace ID	Case Rollup	Case Flow	Analytics	Processing	Users	Tasks	Subtotal	Discount Amount	Total
Client 2	0002	Matter 2	22222	1022809 - MaxBilling	1022809	0	0	0	0	12	0	12	0	12
Client 2	0002	Matter 2	22222	1022868 - Workspace 3	1022868	13.86	0	0	0	12	0	25.86	0	25.86
Client 2	0002	Matter 1	11111	1022966 - DG Workspace	1022966	0	0	0	0	12	0	12	0	12
Client 2	0002	Matter 1	11111	1020945 - Workspace 1	1020945	1.35	0	0	0	12	0	13.35	0	13.35

Report Information | Breakdown by Workspaces

- **Detailed Report Summary (Client Breakdown).xlsx** – the file includes a separate tab for each Client in the report.



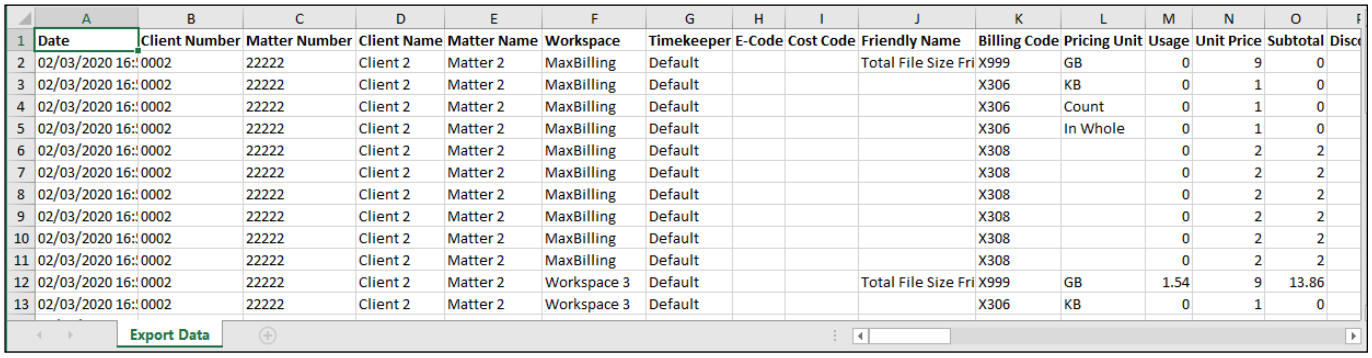
Report Information				
Name:	All Clients (20200201-20200204)		Report Type:	Single Client
Billing Profile:	All Clients		Currency:	USD $
Period Start Date:	01.2.2020 12:00		Subtotal:	63.21
Period End Date:	04.2.2020 12:00		Total Discount:	0
Generated Date:	03.2.2020 4:57		Grand Total:	63.21
Client:	Client 2			
Client Number:	0002			
Matters:	Matter 2, Matter 1			
Matter Numbers:	22222, 11111			

Items

Name	Friendly Name	Billing Code	Pricing Unit	Usage	Unit Price	Subtotal	Discount	Total	Billable	Item Description	Category	Workspaces	Charge Description
Total File Size	Total File Size Friendly Name	X999	GB	1.69	9	15.21	0	15.21	True	The peak total file size of files in the works	Case Rollup		
CA Non Native Documents Size		X306	KB	0	1	0	0	0	True	Peak size of Non Native documents that we	Analytics		
CA Non Native Documents		X306	Count	0	1	0	0	0	True	Peak size of Non Native documents that we	Analytics		
CA Total Documents		X306	In Whole	0	1	0	0	0	True	Peak total number of all documents run thro	Analytics		

Client 2 (0002)

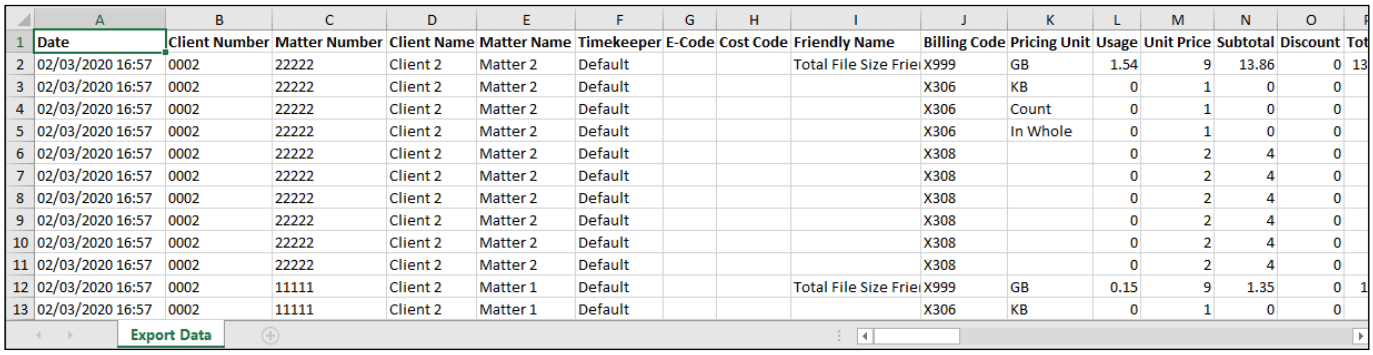
- **ExportData.xlsx** - shows the report information on a billing item level summarized on a Workspace basis.



Date	Client Number	Matter Number	Client Name	Matter Name	Workspace	Timekeeper	E-Code	Cost Code	Friendly Name	Billing Code	Pricing Unit	Usage	Unit Price	Subtotal	Disc
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default			Total File Size Fri	X999	GB	0	9	0	
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default				X306	KB	0	1	0	
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default				X306	Count	0	1	0	
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default				X306	In Whole	0	1	0	
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default				X308		0	2	2	
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default				X308		0	2	2	
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default				X308		0	2	2	
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default				X308		0	2	2	
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default				X308		0	2	2	
02/03/2020 16:	0002	22222	Client 2	Matter 2	MaxBilling	Default				X308		0	2	2	
02/03/2020 16:	0002	22222	Client 2	Matter 2	Workspace 3	Default			Total File Size Fri	X999	GB	1.54	9	13.86	
02/03/2020 16:	0002	22222	Client 2	Matter 2	Workspace 3	Default				X306	KB	0	1	0	

Export Data

- **ExportData-Matters.xlsx** - shows the report information on a billing item level summarized on a Matter basis.

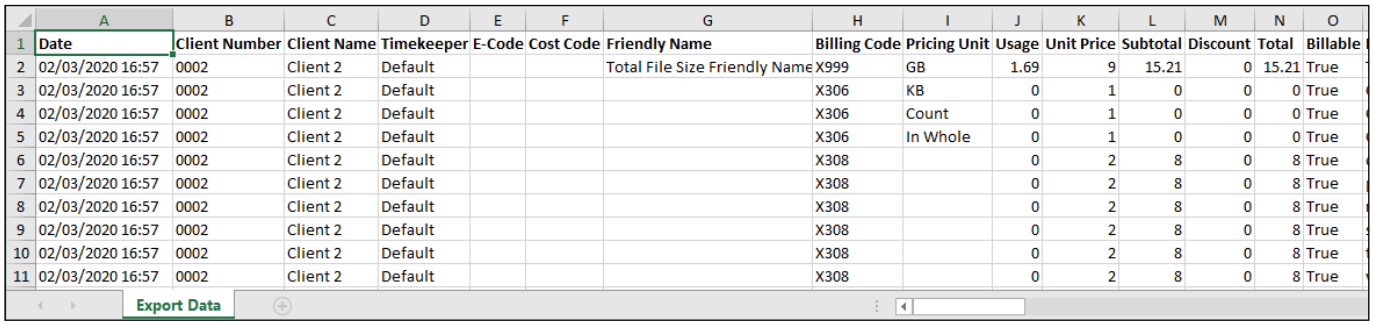


Date	Client Number	Matter Number	Client Name	Matter Name	Timekeeper	E-Code	Cost Code	Friendly Name	Billing Code	Pricing Unit	Usage	Unit Price	Subtotal	Discount	Tot
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default			Total File Size Frie	X999	GB	1.54	9	13.86	0	13
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X306	KB	0	1	0	0	
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X306	Count	0	1	0	0	
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X306	In Whole	0	1	0	0	
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X308		0	2	4	0	
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X308		0	2	4	0	
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X308		0	2	4	0	
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X308		0	2	4	0	
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X308		0	2	4	0	
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X308		0	2	4	0	
02/03/2020 16:57	0002	22222	Client 2	Matter 2	Default				X308		0	2	4	0	
02/03/2020 16:57	0002	11111	Client 2	Matter 1	Default			Total File Size Frie	X999	GB	0.15	9	1.35	0	1
02/03/2020 16:57	0002	11111	Client 2	Matter 1	Default				X306	KB	0	1	0	0	

Export Data

- **ExportData-Clients.xlsx** - shows the report information on a billing item level summarized on a

Client basis.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Date	Client Number	Client Name	Timekeeper	E-Code	Cost Code	Friendly Name	Billing Code	Pricing Unit	Usage	Unit Price	Subtotal	Discount	Total	Billable
2	02/03/2020 16:57	0002	Client 2	Default			Total File Size Friendly Name	X999	GB	1.69	9	15.21	0	15.21	True
3	02/03/2020 16:57	0002	Client 2	Default				X306	KB	0	1	0	0	0	True
4	02/03/2020 16:57	0002	Client 2	Default				X306	Count	0	1	0	0	0	True
5	02/03/2020 16:57	0002	Client 2	Default				X306	In Whole	0	1	0	0	0	True
6	02/03/2020 16:57	0002	Client 2	Default				X308		0	2	8	0	8	True
7	02/03/2020 16:57	0002	Client 2	Default				X308		0	2	8	0	8	True
8	02/03/2020 16:57	0002	Client 2	Default				X308		0	2	8	0	8	True
9	02/03/2020 16:57	0002	Client 2	Default				X308		0	2	8	0	8	True
10	02/03/2020 16:57	0002	Client 2	Default				X308		0	2	8	0	8	True
11	02/03/2020 16:57	0002	Client 2	Default				X308		0	2	8	0	8	True

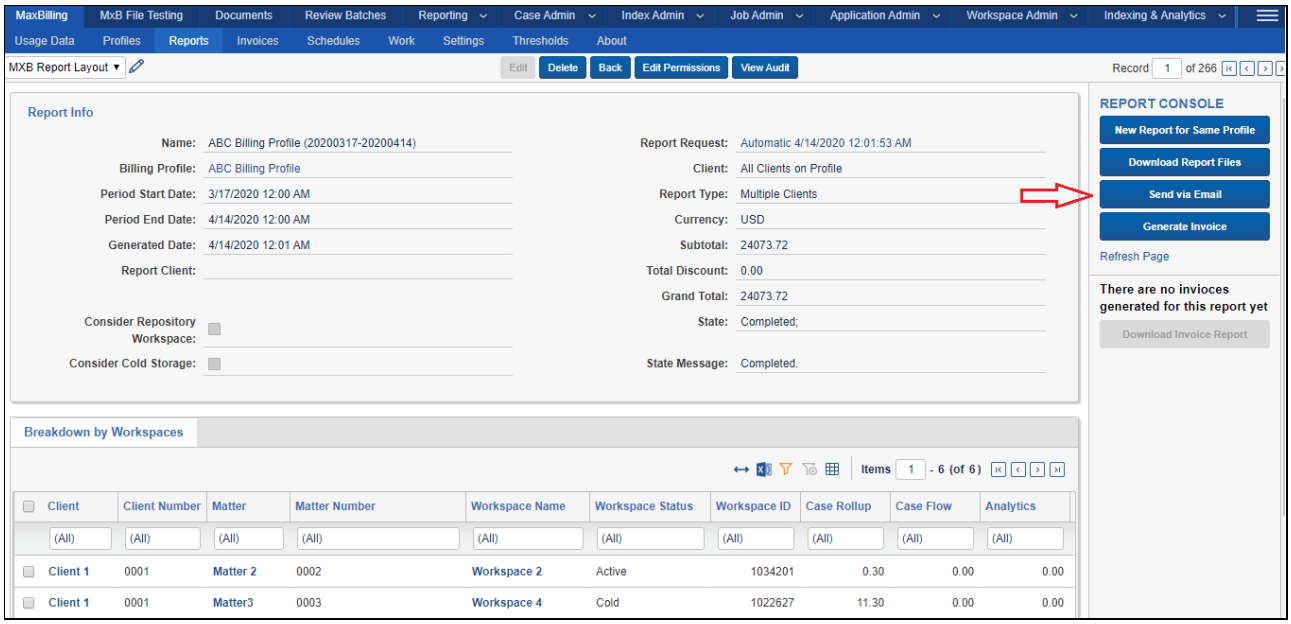
Export Data

Note: " ' " symbol is added automatically in the beginning of each cell, containing text, in all the excel report files, to prevent from potential formula injection.

Send Report files

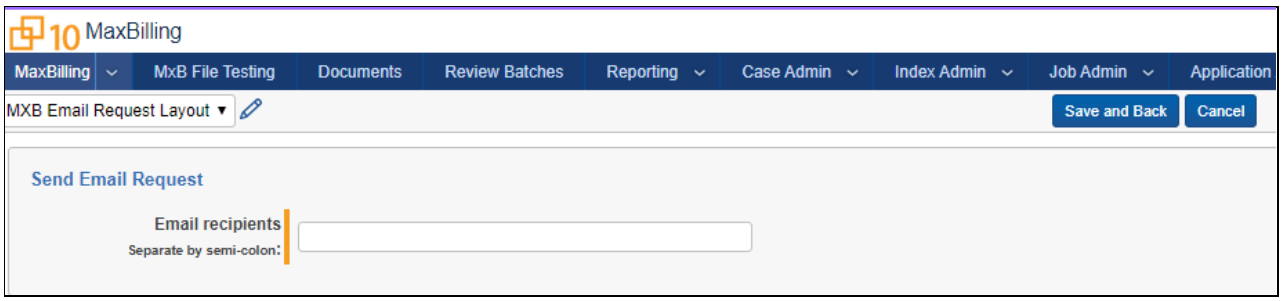
To send the report via email:

1. Click **Send via Email** in the report console.



2. Enter recipient's email(s).

3. Select **Save and Back**.



Note: You need to have ***SMTPServer***, ***SMTPPort*** and ***AuthenticationEmailFrom*** Instance settings properly set to send reports via email.

Invoices

Invoicing functionality allows applying a variety of custom options and flexibility of invoicing process and invoice contents. This functionality allows you to:

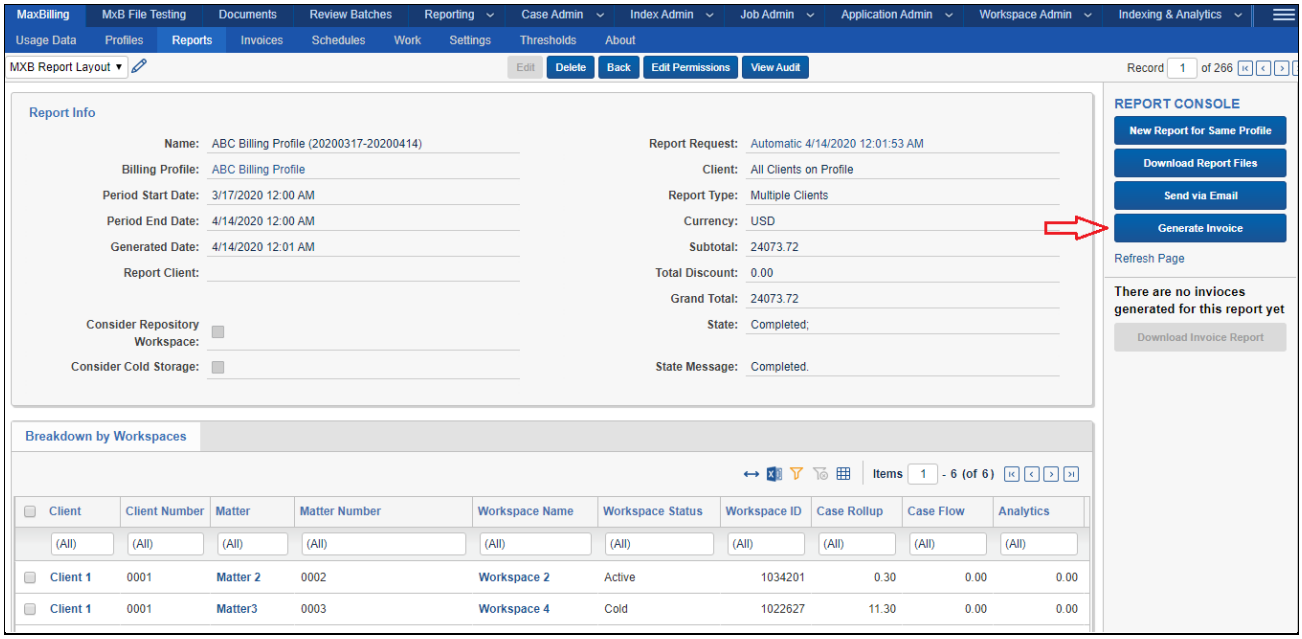
- Link (map) Workspaces, Matters or Clients to a specific attorney.
- Run multiple invoices for one report with just one click.
- Specify the fields and the wording that will appear in the generated invoices.

- Specify what will be the invoice items.
- Generate the invoices along with the report generation in one process.
- Schedule the generation of the invoices.
- Specify the email recipient for each invoice.
- Apply one-time invoice setting to overwrite the default settings for occasional invoice generations without the need to edit the default mapping.

Invoice generation

To generate an invoice for a report manually:

1. Navigate to the report you want to generate an invoice for.
2. Click **Generate Invoice** button in the Report console.



3. Complete the following fields:
   - **Invoice Type:** defines what invoices will be created.
     - **For the Whole Report** – one invoice will be generated for the whole report. This option is active for all reports.
     - **For Clients** – a separate invoice will be generated for each of the clients included in the report. This option is active for reports which were generated with a Client breakdown.
     - **For Matters** – a separate invoice will be generated for each of the matters included in the report. This option is active for reports which were generated with a Matter breakdown.
     - **For Workspaces** – a separate invoice will be generated for each of the workspaces included in the report. This option is active for reports which were generated with a

Workspace breakdown.

- **Invoice Template:** select the template you want to use (see Invoice Templates section).

  The templates determine the contents in Issuer section and General information section of the invoice and the way the report information will be aggregated.

  - For reports which were generated with a Breakdown by Workspaces report you can use Report, Workspace and Individual Item types of Template.
  - For reports which were generated with a Breakdown by Matters report you can use Report, Matter and Individual Items types of Template.
  - For reports which were generated with a Breakdown by Clients report you can use Report, Clients and Individual Items types of Template.
  - For reports which were generated with a Breakdown by Instance report you can use Report and Individual Item types of Template.

Possible Invoice Type / Invoice Template / Report Breakdown combinations:

Invoice type	Template type	Report Breakdown
For the Whole Report	Individual Report/Pricing items	Workspace
For the Whole Report	Workspace	Workspace
For the Whole Report	Report	Workspace
For the Whole Report	Individual Report/Pricing items	Matter
For the Whole Report	Matter	Matter
For the Whole Report	Report	Matter
For the Whole Report	Individual Report/Pricing items	Client
For the Whole Report	Client	Client
For the Whole Report	Report	Client
For the Whole Report	Individual Report/Pricing items	Instance
For the Whole Report	Report	Instance
For Workspaces	Individual Report/Pricing items	Workspace
For Workspaces	Workspace	Workspace
For Matters	Individual Report/Pricing items	Matter
For Matters	Matter	Matter
For Matters	Report	Matter
For Clients	Individual Report/Pricing items	Client
For Clients	Client	Client
For Clients	Report	Client

Note: If you want to create separate invoices for your Clients but to use **Workspace invoice template** or **Matter invoice template**, you can generate reports with type **Separate reports for each client in the profile** and then to select **Invoice Type "For the Whole Report"**.

- **Recipient Information:**

  - **Use invoice mapping** – another field will appear to select the mapping type. The receiver information will be populated according to the attorney information set in the mappings. (see Invoice Mapping section)

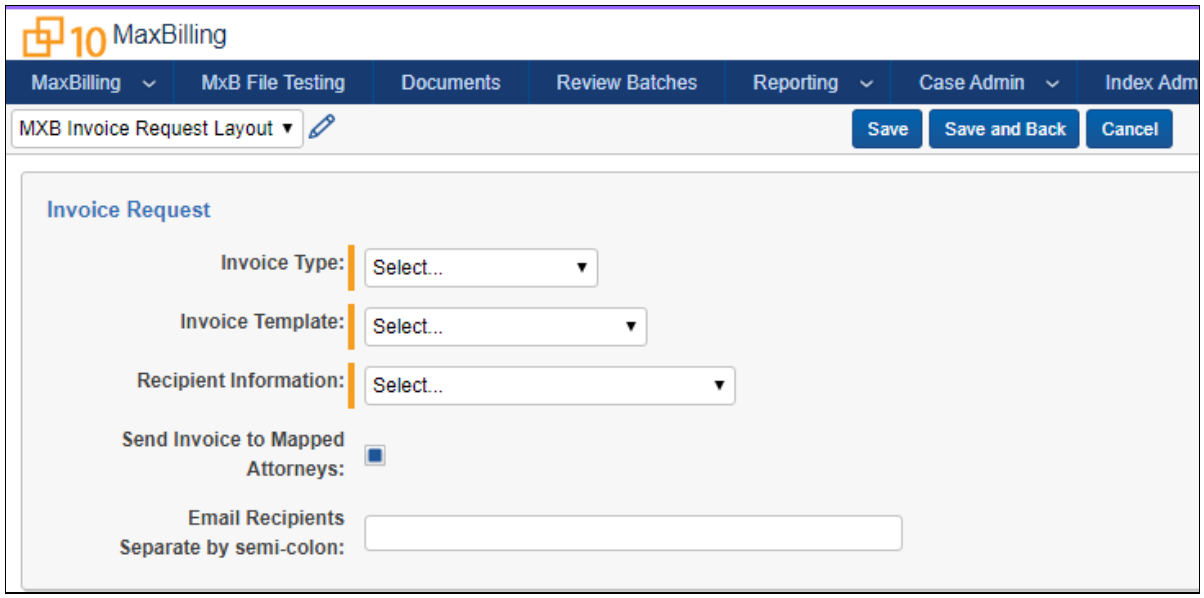
  - **Apply One-time recipient information** - if you want to create an invoice occasionally for a one-time recipient and you will specify the receiver information ad hoc. Ten additional fields appear to specify the receiver's information.

  - **Relativity Client info** – only matter/client name and number will appear in receiver's section in the invoice.

Note: If you generate an invoice with type **For the whole report** and select **Relativity Client info** option**,** the receiver's section will be empty.

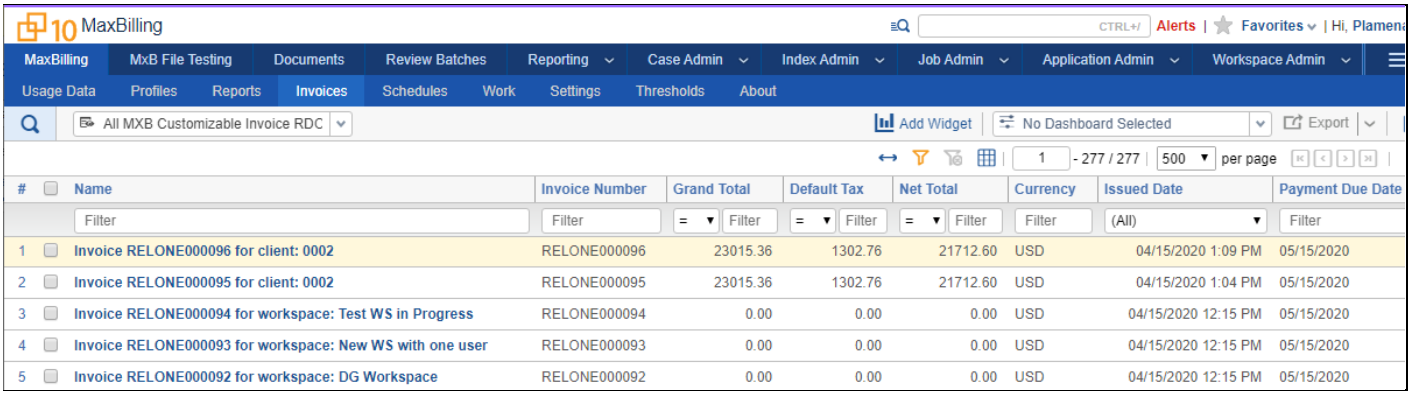
- **Send Invoice to Mapped Attorneys:** the generated invoices will be sent to the mapped attorneys if you have selected **Use invoice mapping** option above.

- **Email Recipients:** you can send the invoices occasionally to different emails. (optional)

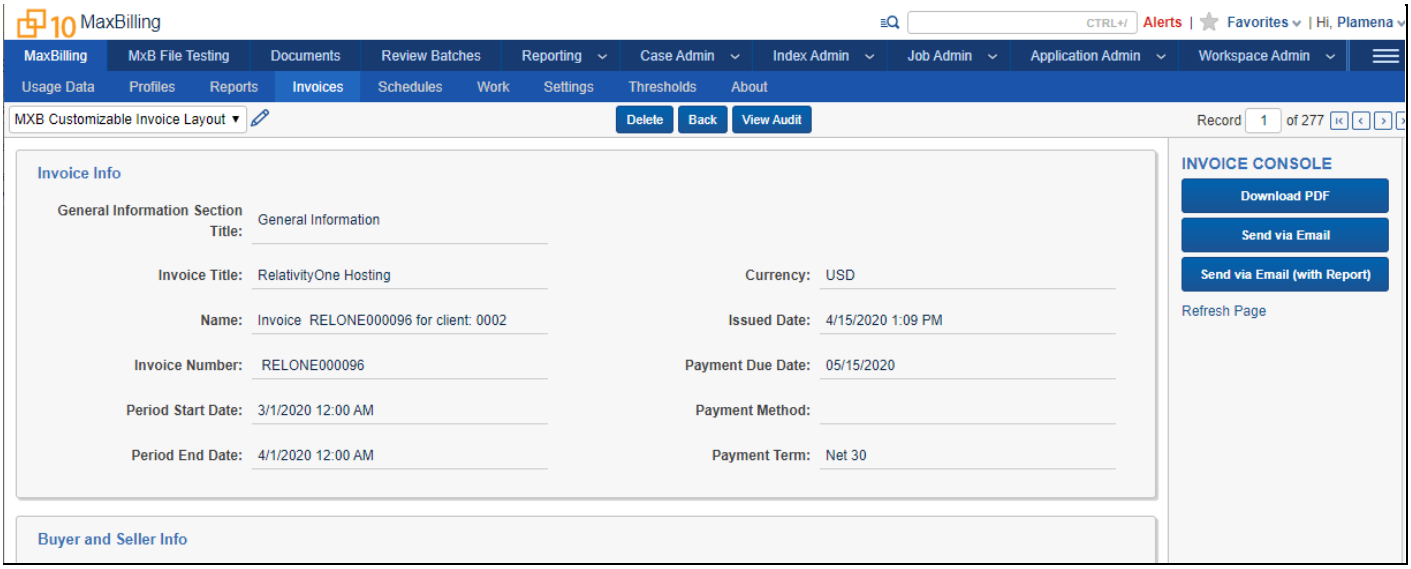


4. Click **Save**. The invoice request is created and will be picked up by Invoice Generator Agent.

Note: All generated invoices are available for review, download and additional sending under **Invoices** tab.



Using the available options in **Invoice Console**, you can download the invoice in PDF format, send the invoice via email and send the invoice with its corresponding report via email.



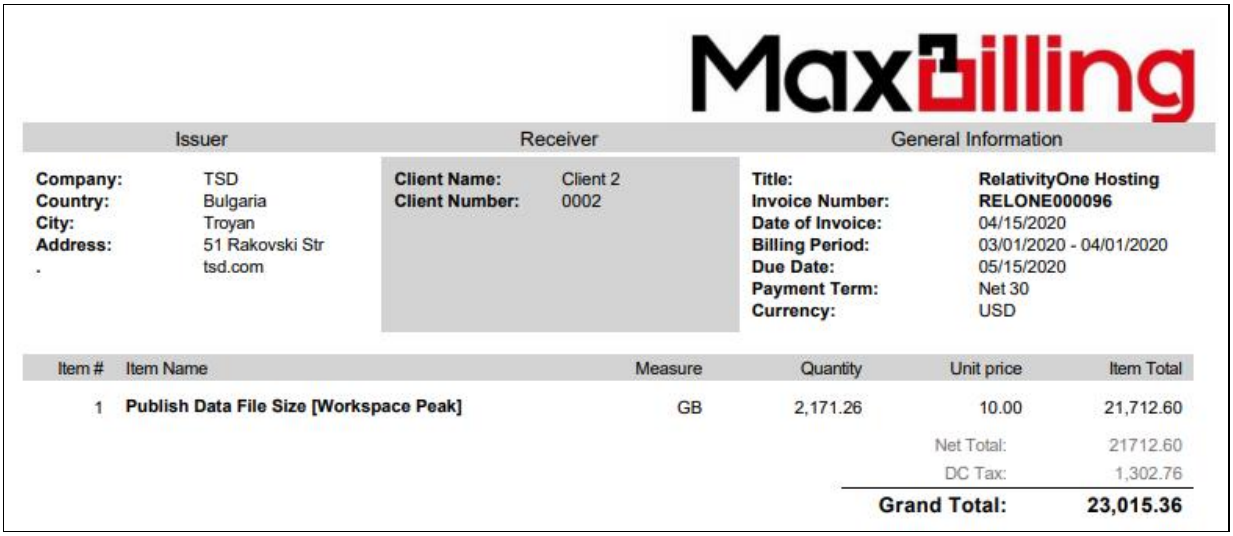
Invoice download – single invoice PDF

You can download the invoice in PDF file using the **Download PDF** button in the **Invoice Console**.

To download the invoice:

1. Click **Download PDF** button in Invoice console.

   PDF Invoice:



MaxBilling

Issuer		Receiver		General Information	
Company:	TSD	**Client Name:**	Client 2	**Title:**	**RelativityOne Hosting**
Country:	Bulgaria	**Client Number:**	0002	**Invoice Number:**	**RELONE000096**
City:	Troyan			**Date of Invoice:**	04/15/2020
Address:	51 Rakovski Str			**Billing Period:**	03/01/2020 - 04/01/2020
.	tsd.com			**Due Date:**	05/15/2020
				Payment Term:	Net 30
				Currency:	USD

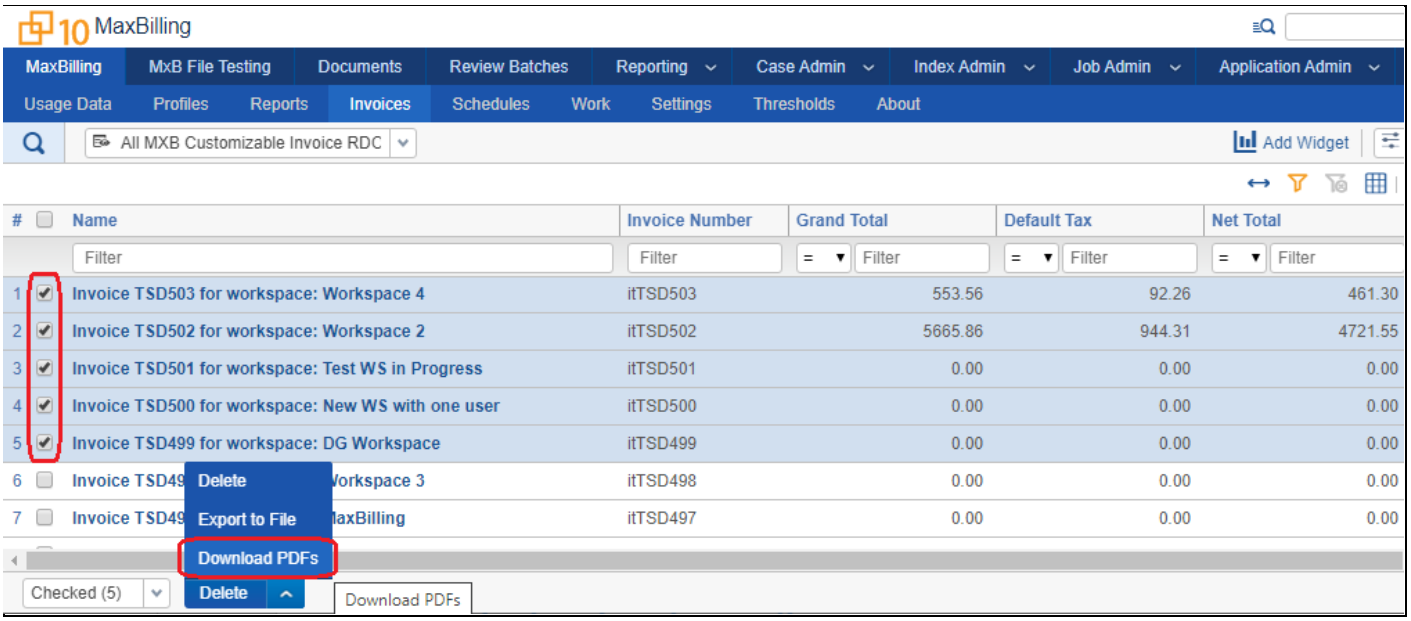
Item #	Item Name	Measure	Quantity	Unit price	Item Total
1	**Publish Data File Size [Workspace Peak]**	GB	2,171.26	10.00	21,712.60
				Net Total:	21712.60
				DC Tax:	1,302.76
				Grand Total:	**23,015.36**

Invoice download – multiple invoice PDFs

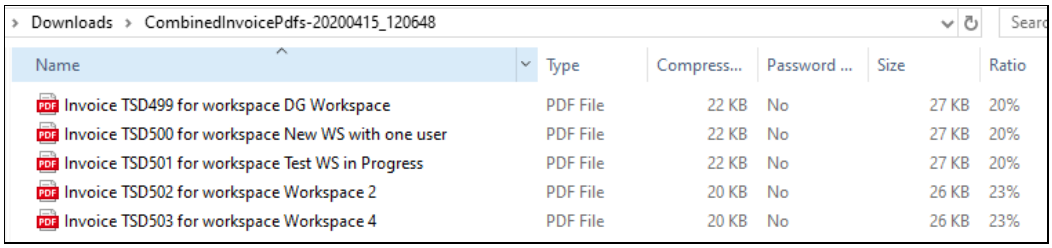
An option to download multiple invoices to a ZIP file is available as a mass operation in Invoices tab.

To download multiple invoices via mass operation:

1. Navigate to **Invoices** tab
2. Select the invoices you would like to download
3. Select Download PDFs mass operation



4. A zip folder with PDFs for the selected invoices is downloaded.



Send the invoice via email

To send the invoice via email:

1. Click **Send via Email** button in **Invoice Console**.
2. Enter recipient's email(s) and select **Save and Back**.

Send the invoice via email with the report

To send the invoice via email with report:

1. Select **Send via Email (with Report)**.
2. Enter recipient's email(s) and select **Save and Back**.

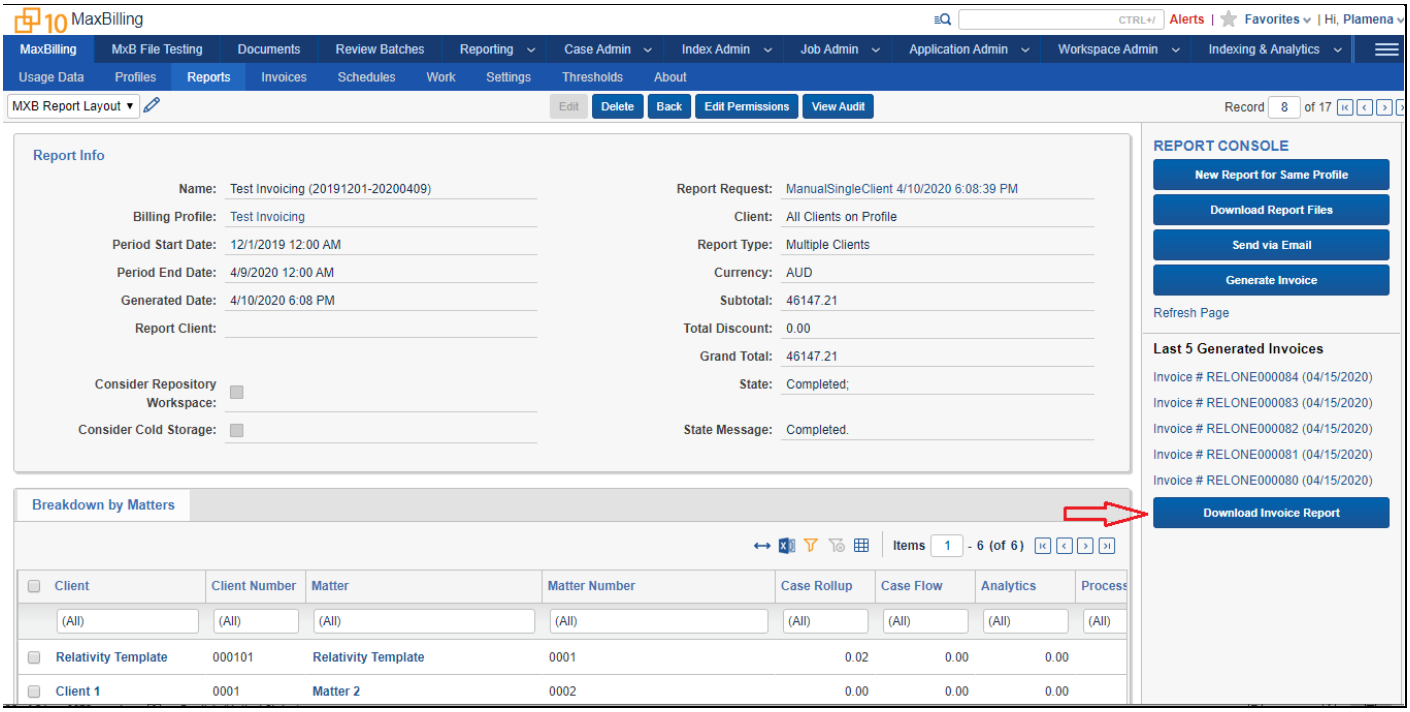
Note: You need to have **SMTPServer**, **SMTPPort** and **AuthenticationEmailFrom** Instance settings properly set to send reports and invoices via email.

Invoice report

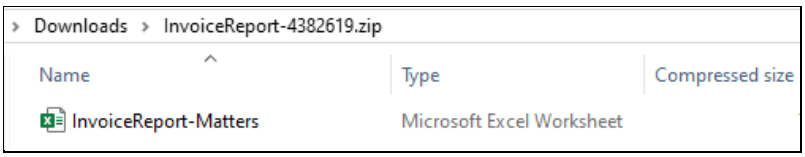
To download Invoice Report excel file:

1. Click ***Download Invoice Report*** button in the report console.

Note: ***Download Invoice Report*** button is active for reports with Workspace, Matter and Client breakdown, if there are some generated invoices based on this report.



A zip file with the ***Invoice repor***t excel file is downloaded.



Invoice Report file contains invoice information along with the corresponding report information, aggregated according to the breakdown used in the report (Workspace/Matter/Client).

The invoice information is populated in the following designated columns, placed in the beginning of the file:

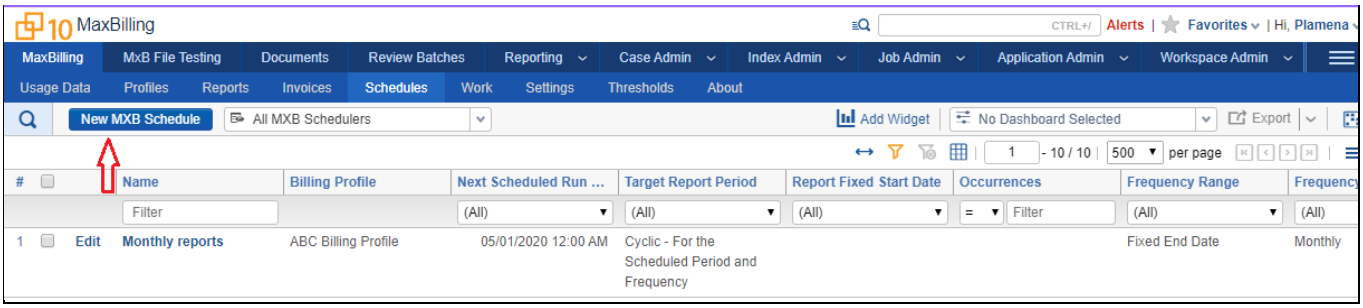
- **Invoice Number** – the number of the corresponding to the report item invoice.
- **Invoice Date** – the generation date of the corresponding to the report item invoice.
- **Invoice Tax Rate** – the tax rate in the corresponding to the report item invoice.
- **Invoice Tax Value** – the total tax value calculated in the corresponding to the report item invoice.
- **Invoice Grand Total** – the grand total of the corresponding to the report item invoice.
- **Invoice Currency** – the currency used in the corresponding to the report item invoice.
- **Billing Period Start Date** – the start date of the billing period.
- **Billing Period End Date** – the end date of the billing period.

	A	B	C	D	E	F	G	H
1	Invoice Number	Invoice Date	Invoice Tax Rate	Invoice Tax Value	Invoice Grand Total	Invoice Currency	Billing Period Start Date	Billing Period End Date
2	RELONE0000001	04/13/2020	6.00%	5.20	91.90	USD	04/10/2020	04/13/2020
3	RELONE0000002	04/13/2020	6.00%	4.73	83.53	USD	04/10/2020	04/13/2020
4	RELONE0000003	04/13/2020	6.00%	5.80	102.40	USD	04/10/2020	04/13/2020
5	RELONE0000004	04/13/2020	6.00%	45.25	799.45	USD	04/10/2020	04/13/2020
6	RELONE0000005	04/13/2020	6.00%	226.61	4003.41	USD	04/10/2020	04/13/2020
7	RELONE0000005	04/13/2020	6.00%	226.61	4003.41	USD	04/10/2020	04/13/2020

The information in the rest of the columns in the Invoice Report file refers to the report.

Scheduler

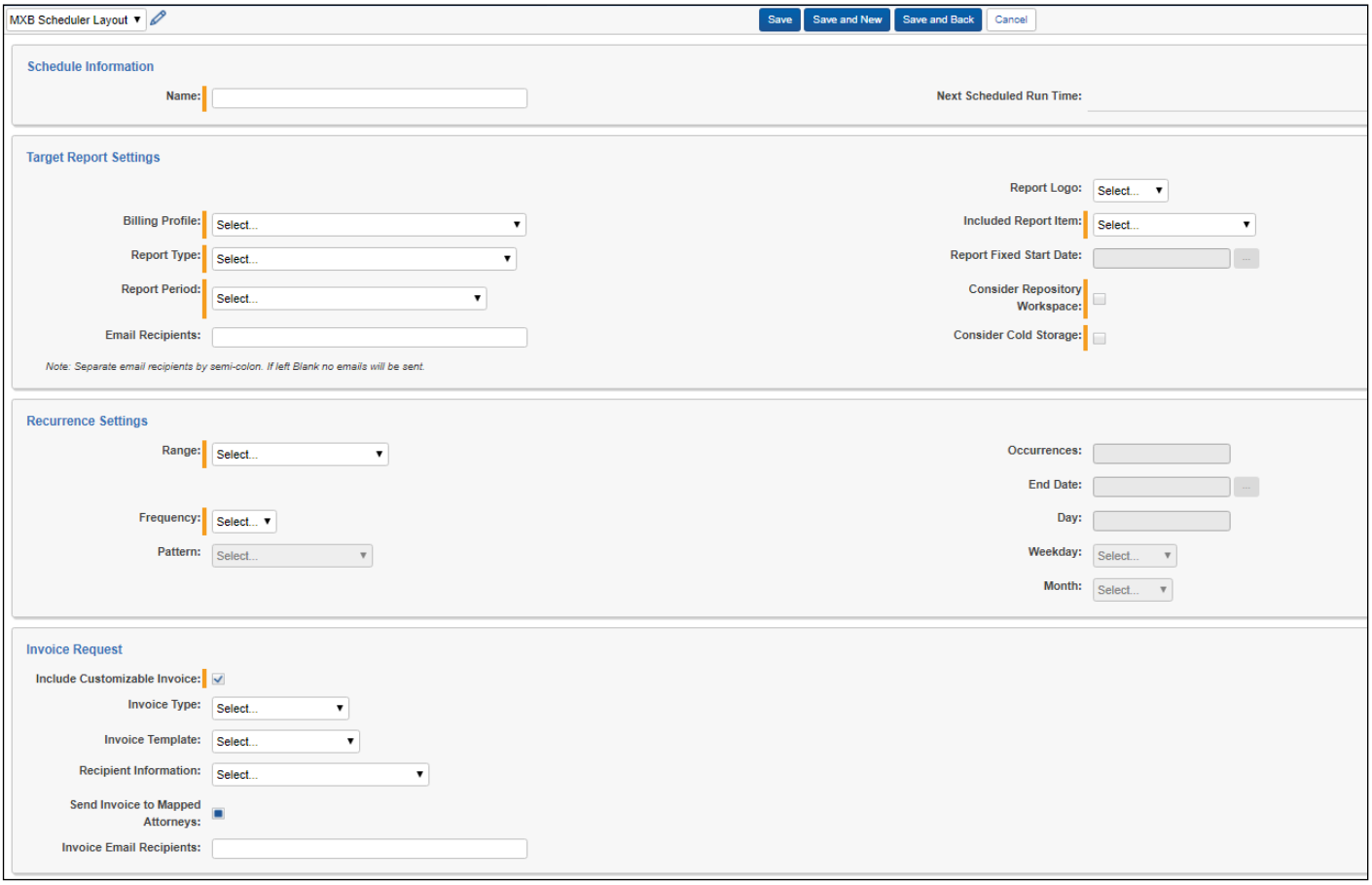
The Scheduler helps you automate the report and invoice generation process by setting different type of schedule. You can create as many schedules as you need, even multiple schedules, related to the same profile.



Creating a new schedule

To create a new **MaxBilling** schedule:

1. Navigate to the **Schedules** tab.
2. Select **New MXB Schedule**.



3. Complete the following fields:

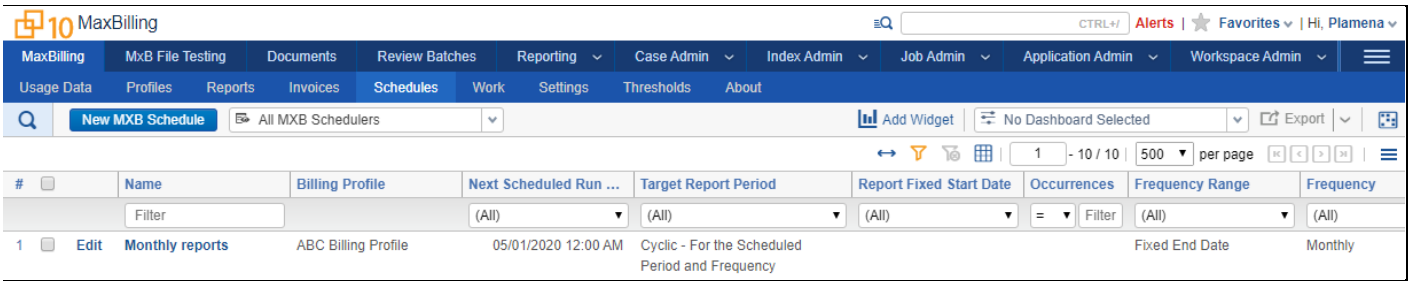
- **Name** - the name of your schedule.
- **Billing Profile** - the Profile for which you want the schedule to generate reports.
- **Report Type** - the type of the reports that will be generated.
- **Report Period** - the period for which you want the reports to be generated.
    - **Cyclic -** for the scheduled period and frequency
    - **Incremental -** from a fixed date
- **Email Recipients -** the recipients to whom the reports will be sent. (optional)
- **Range -** the range for which the Scheduler will be working.
    - **No End Date**
    - **Fixed Number of Occurrences**
    - **Fixed End Date**
- **Frequency -** the frequency of the report generation.
    - **Daily -** reports generated every day.

- **Weekly -** reports generated on a fixed day of every week.
- **Monthly -** reports generated on a fixed day of every month.
- **Yearly -** reports generated on a fixed day of a month every year.

- **Pattern -** the pattern of the report generation occurrence. This drop down is enabled if you choose weekly, monthly or yearly frequencies.
  - **On Fixed Day of the Week** - pattern for Weekly frequency.
  - **On Fixed Day of the Month** - pattern for Monthly & Yearly frequencies.
  - **On a Fixed Date** - pattern for Yearly frequency.
- **Next Scheduled Run Time** - shows the next run time of the schedule. (read-only)
- **Included Report Items** - select breakdown by Workspaces, by Matter, by Client or by Instance. Breakdown by Instance is applicable only for Instance Type reports.
- **Report Logo** - select a Logo.
- **Report Fixed Start Date** - the start day of the report. This field is enabled if you choose an Incremental Report period.
- **Consider Repository Workspace** – this option is applicable for Relativity®One only. When it is selected, the Repository workspaces' usage will be recalculated and it will be counted as 1/3 in **MaxBilling** reports. When the option is not selected, all Workspaces will be considered as regular ones.
- **Consider Cold Storage** – this option is applicable for Relativity®One only. When it is selected, the Cold Storage workspaces' usage will be recalculated and it will be counted as 1/4 in **MaxBilling** reports. When the option is not selected, all Workspaces will be considered as regular ones.
- **Occurrences** - the number of occurrences for the schedule. This field is available if you choose the Fixed Number of Occurrences range.
- **End Date** - the end day of the schedule. This field is enabled if you choose the Fixed End Date range.
- **Day** - in this field you set a day of the month for the Monthly and Yearly frequencies. It is enabled if you choose Monthly or Yearly frequency.
- **Weekday** - in this field you set a day of the week for the Weekly frequency. It is enabled if you choose Weekly frequency.
- **Month** - in this field you set a month of the year for the Yearly frequency. It is enabled if you choose Yearly frequency.
- **Include Customizable Invoice** – this option determines if invoices will be generated along with the scheduled reports.

Note: If Include Customizable Invoice option is selected, follow the steps in Invoice generation section to have all invoices, which are corresponding to the reports generated by the scheduler, generated, as well.

You can view all schedules under **Schedules** tab.

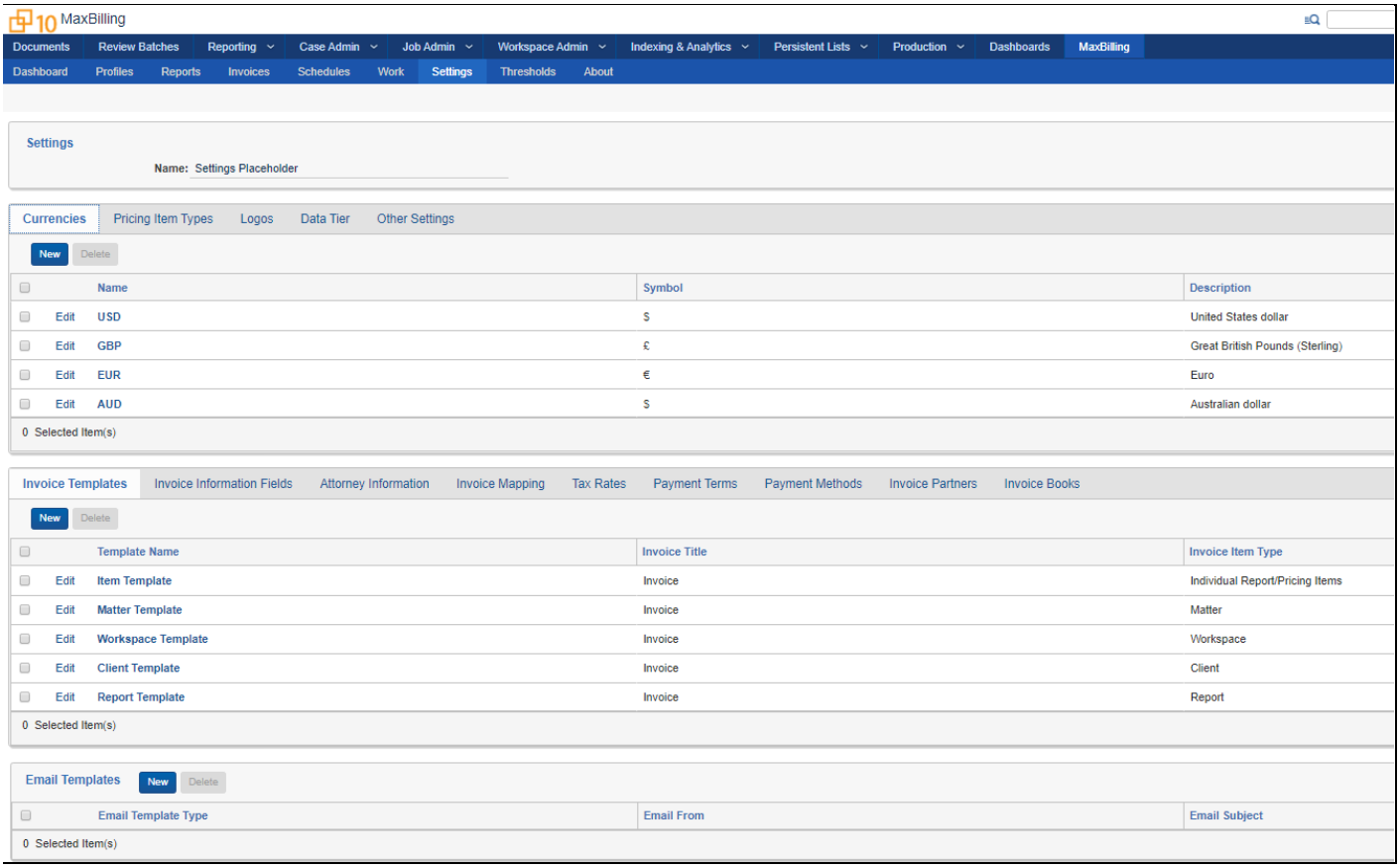


Settings

Under **Settings** tab, you can view, add or edit Currencies, Pricing Item Types, Logos, Payment Methods, Payment Terms, Invoice Partners, Tax Rates, Invoice Books, Attorney Information, Invoice Mapping, Invoice Information Fields, Invoice Templates, Email Templates and view or edit Data Tier and Customer Code.

To add a new item, click **New** under each sub-tab in **Settings** tab.

To edit an item, click **Edit** button in front of its name or open it by clicking its name and then select **Edit** button.



Currencies

To add a **Currency,** populate the following fields:

- **Abbreviation -** abbreviation of the currency.
- **Symbol -** the symbol of the currency. (optional)
- **Description -** additional information. (optional)

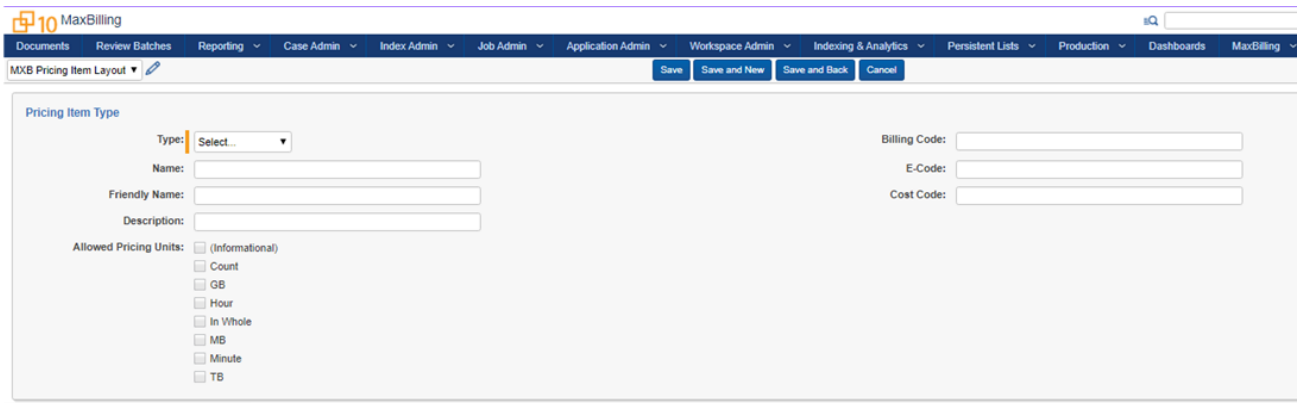
Pricing Item Types

To add a custom Pricing Item, populate the following fields:

- **Type** – select the billing category to which your custom task belongs to – Task. (required)
- **Name** – type the name of the custom task. (recommended)
- **Friendly Name** – type some friendly name of the custom task. (optional)
- **Description** – type more information about the custom task (recommended)
- **Allowed Pricing Units** – select the applicable units. (recommended)

Note: Users will be able to select only from the allowed units when they add the custom task to a billing profile and when they add statistics regarding the custom task to the billing periods.

- **Billing Code** – add information about billing code. (recommended)
- **E-Code** – add information about E- code. (optional)
- **Cost Code** – add information about Cost code. (optional)



To view a **Pricing Item,** click its name under Pricing Item Types subtab. Click **Edit** button to edit its Friendly Name, Billing Code, E-Code, Cost Code, Description.

Logos

To add a **Logo,** populate the following fields:

- **Name** - The name of the logo.
- **Logo** - upload a file.

Data tier

To view the **Data Tier,** navigate to Data Tiers tab. Click **Edit** option to change its size.

Other Settings

- **Timekeeper** – Timekeeper value appears in ExportData.xlsx. (optional)
- **Customer Code** – Default Name: **Default**. You can add your customer code here to activate a specific functionality in MaxBilling.

Invoice Templates

This setting refers to Invoicing functionality.

To add **Invoice Template**, populate the following fields:

- **Template Name:** this name is for internal information, not being shown on the invoice.
- **Invoice Start Number:** Auto increment field - it increases on every generation and is no longer editable once it is set.

Note: Invoice Start Number field accepts any characters, once the last character is a digit. Upon each invoice generation, the digit is being incremented, and the rest of the characters are kept.

- **Invoice Title:** you specify the title of the invoice that will be shown on the PDF.
- **Invoice Item Type:** you specify the type of the items which will appear in the invoices. The billing information will be grouped based on this type:
  - **Individual Report/Pricing items** – each report item will appear on a separate row in the invoice, based on the items, included in the template:

Item #	Item Name	Measure	Quantity	Unit price	Item Total
1	**Publish Data File Size**	Size	2211.52	1.00	2,211.52
2	**Total File Size + Document Size Text Only**	Size	2211.52	1.50	3,317.28
3	**Processing**	Size	6.74	1.00	6.74
4	**Relativity Users**	Count	4	100.00	400.00
				Net Total:	5935.54
				VAT:	593.55
				Grand Total:	**6,529.09**

- **Workspaces** – each workspace will appear on a separate row in the invoice – the report information will be aggregated on a workspace basis:

Item #	Item Name	Measure	Quantity	Unit price	Item Total
1	**1017455 - UBC ws**	Unit	1	18,322.45	18,322.45
2	**1017498 - UBC ws 2**	Unit	1	17,425.63	17,425.63
3	**1019975 - LBC WS - broken**	Unit	1	17,124.84	17,124.84
4	**1021026 - MaxBilling**	Unit	1	500.00	500.00
5	**1021065 - LBC WS 2**	Unit	1	40.10	40.10
6	**1021107 - APWS1**	Unit	1	0.00	0.00
7	**1022243 - APWS2**	Unit	1	0.00	0.00
				Net Total:	53413.02
				VAT:	5,341.30
				Grand Total:	**58,754.32**

- **Matters** – each matter will appear on a separate row in the invoice – the report information will be aggregated on a matter basis

Item #	Item Name	Measure	Quantity	Unit price	Item Total
1	**Matter 1 (1.1)**	Unit	1	52,913.02	52,913.02
2	**Matter 2 (1.0002)**	Unit	1	500.00	500.00
				Net Total:	53413.02
				VAT:	5,341.30
				Grand Total:	**58,754.32**

- **Clients** – each client will appear on a separate row in the invoice – the report information will be aggregated on a client basis
- **Report** – only one row with the total report sum will appear in the invoice.

- **Invoice General Information Section Title:** you specify the title of this document section where the document number, issued date, payment terms and other details appear.
- **Receiver Section Title:** you specify the title of this document section where the receiver information appears.
- **Invoice Issuer Section Title:** you specify the title of this document section where the issuer information appears.
- **Invoice Issuer Fields:** you select (from already created Invoice Information fields with type

Invoice Issuer) what information about the issuer will appear on the document.

- **Logo:** you can add a logo to appear in the invoice. (optional)
- **Invoice Prefix:** the invoice prefix which will be shown in front of the invoice number. (optional)
- **Currency:** you can select a currency to appear in the invoice. (optional)
- **Payment Method:** you can select a payment method to appear in the invoice. (optional)
- **Payment Term:** you can select a payment term to appear in the document. (optional)
- **Default Tax:** you must add a tax.
- **Tax Rate 2:** you can have a second tax. (optional)
- **Tax Rate 3**: you can have a third tax. (optional)

Note: After you save an invoice template of type **Individual Report/Pricing items,** you must add invoice items in it. Invoice items are automatically added to the template with default values for the templates of the other types (Workspace, Matter, Client, Report). All invoice items in a template can be edited at any time.

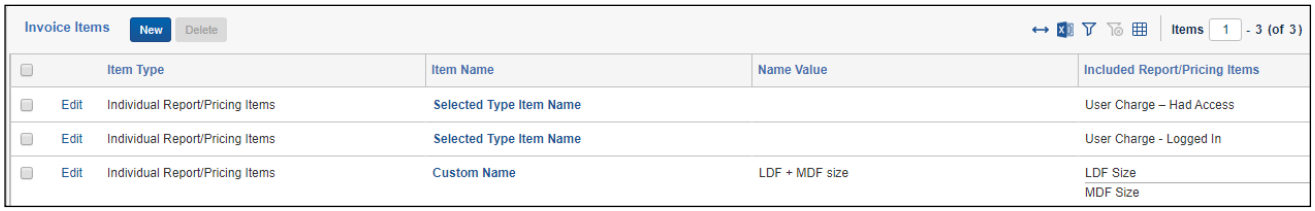
To add invoice items in the template, click **New** button in the Template Layout and populate the following fields:

- **Item Type** – the possible value is the same as the template type.
- **Item Order** – you specify the order the items will appear in the invoice (if you have more items).
- **Item Name:**
  - **Selected Type Item Name** – the item name will appear in the invoice as it is in the report.
  - **Custom Name** – additional field **Name Value** will appear to type your custom name of the item. This name will appear in the report for the relevant report item.

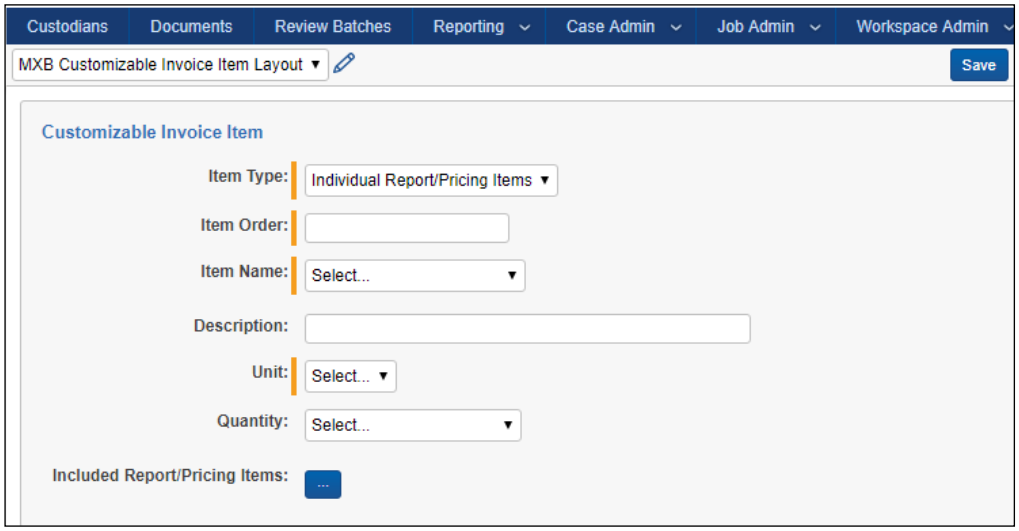
Note: Items which are added with a Selected Type Item Name to the template, will be included in the invoices, if they are present in the corresponding billing reports.

Items which are added with a Custom name to the template, will always be included in the invoices, regardless they are present in the corresponding billing reports or not. If the items are not present in the billing report, they will appear in the invoice with 0.00 quantity and total.

- **Description** – this field is for additional internal information. (optional)
- **Unit** – you specify the item unit that will appear in the invoice.
- **Quantity:**
  - **Based on calculated unit** – the item quantity will be the same as in the report.
  - **Static quantity** – additional field will appear to set your static quantity value that will be considered for the total invoice calculation.
- **Included Report/Pricing Items –** select from all report items which you would like to appear in the invoice.



Note: You can create a combination of report items which will be summed on the same row if they use the same units (count or size). This feature allows you to generate summarized reports based on the detailed MaxBilling reports.



Invoice Information Fields

This setting refers to Invoicing functionality.

To add **Invoice Information Field**, populate the following fields:

- **Field Type:**
  - **Attorney Info** – the field will refer to the receiver information section of the generated invoices. Fields of this type are available for selection when you add Attorney Information.

- **Invoice Issuer** – the field will refer to the issuer information section of the generated invoices. Fields of this type are available for selection when you add Invoice Templates.

Note: You need to create at least one **Invoice Issuer** field type to be able to create a template for generating an invoice.

- **Field Name:** defines the name of the field that will appear in the relevant section in the invoice**.**
- **Field Text Value:** defines the text value that will appear in the relevant section in the invoice**.**
- **Field Order:** you specify the order the fields will appear with in the relevant invoice section.
- **Show in invoice:** you specify if this field will appear in the generated invoice.

Attorney Information

This setting refers to Invoicing functionality.

To create Attorney information entry, populate the following fields:

- **Attorney First Name:** Attorney first name.
- **Attorney Middle Name:** Attorney middle name. (optional)
- **Attorney Last Name:** Attorney last name.
- **Invoice Information:** select from Invoice Information field entries with Field Type Attorney info.

Note: This information will appear in receiver's section in an invoice if you use mappings when you generate it. (optional)

- **Attorney Email:** invoices will be sent to this email if you select to send the invoices to the mapped attorneys when you generate invoices using mappings. (only the invoices relevant to this attorney, according to the mappings) (optional)

Invoice Mapping

This setting refers to Invoicing functionality.

To create Invoice Mapping, populate the following fields:

- **Attorney Information:** The attorney who you would like to be the owner of the mapping.
- **Mapping Type:**
  - **Default** – this mapping will be used when a report contains any unmapped objects and it is mandatory to have set such.

Note: You must have a Default mapping created to be able to generate invoices using any mappings.

- **Workspace** – this type allows you to map specific workspaces to the selected attorney. An additional field Mapped Workspace(s) appears to select the workspaces.
- **Matter** – this type allows you to map specific maters to the selected attorney. An additional field Mapped Matter(s) appears to select the matters.
- **Client** – this type allows you to map specific clients to the selected attorney. An additional field Mapped Client(s) appears to select the clients.

Tax rates

To create a **Tax Rate,** populate the following fields:

- **Name** - name for reference.
- **Tax Rate % -** the percentage for this tax rate.
- **Description** - additional information. (optional)

Payment terms

To create a **Payment Term,** populate the following fields:

- **Name -** name for reference.
- **Calendar Days -** set the period an invoice must be paid in calendar days.
- **Description -** additional information. (optional)

Payment methods

To create a **Payment Method,** enter a name in the Name field.

Invoice partners – not applicable in the current MaxBilling version

To create an **Invoice Partner,** populate the following fields:

- **Company Name -** the name of the company.
- **Employer/Tax ID -** type the Employer/Tax ID.
- **Site Name -** the name of company site.
- **Street Address -** the street company is registered on.
- **City/State/Zip -** the City/State/Zip company is registered in.
- **Country -** the country.
- **Sales Representative -** name of the sales representative.
- **Email** - contact email. (optional)
- **Phone Number -** contact phone number. (optional)

Invoice books - not applicable in the current MaxBilling version

To create an **Invoice Book,** populate the following fields:

- **Invoice Number Prefix** - set a prefix for the invoice number (optional)
- **Last Invoice Number** - set the last invoice number - if set to 0, the first invoice generated for this book will be with number 2, the next with number 3, etc. It is set only on initial creation of

Invoice Book and cannot be edited after that.

- **Company Name** - the name of the company.
- **Employer/Tax ID** - type the Employer/Tax ID.
- **Site Name** - the name of company site.
- **Street Address** - the street company is registered in.
- **City/State/Zip** - the City/State/Zip company is registered in.
- **Country** - the company's country.
- **Sales Representative** - name of the sales representative.
- **Email** - contact email. (optional)
- **Phone Number** - contact phone number. (optional)

Email Templates

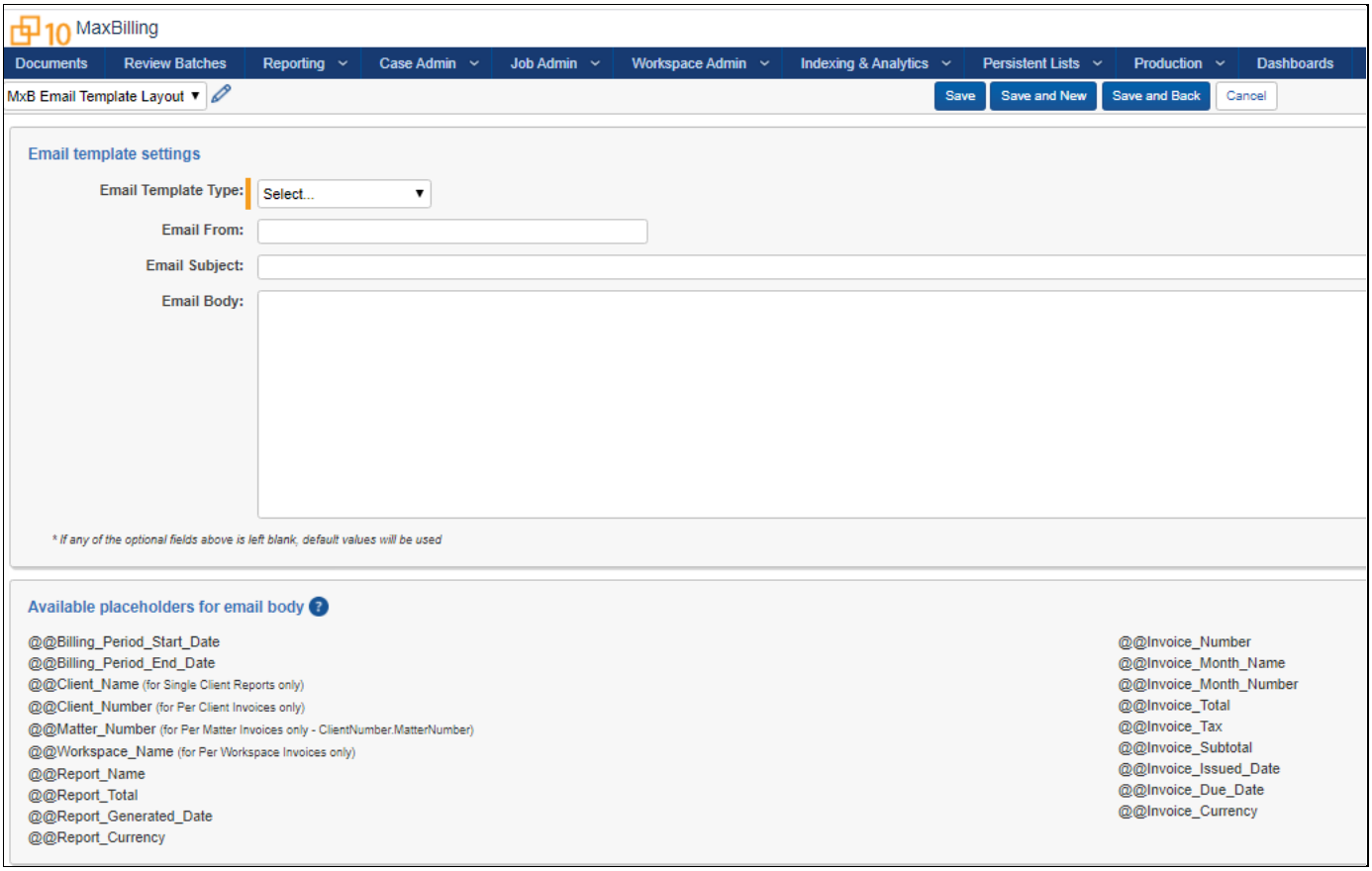
To create an **Email Template,** populate the following fields:

- **Email Template Type** – select a type of the template: (required)
  - **For Report** – the template will be applied when you send MaxBilling reports via email.
  - **For Invoice** – the template will be applied when you send MaxBilling invoices via email.
  - **For Report and Invoice** – the template will be applied when you click **Send Invoice (with Report)** console button from the Invoices layout.

Note: You are not allowed to have more than one template of a type.

- **Email From** – if left blank, default value will be used. Default value uses the value from ***AuthenticationEmailFrom*** Instance Setting (kCura.Notification section)
- **Email Subject** –if left blank, default value will be used.
- **Email Body** - if left blank, default value will be used.

Note: You can add placeholders to the email subject and email body to include specific information related to the corresponding reports and invoices being sent (e.g. information about the billing period, invoice number, etc.). the available placeholders are shown in the Email Template Layout.

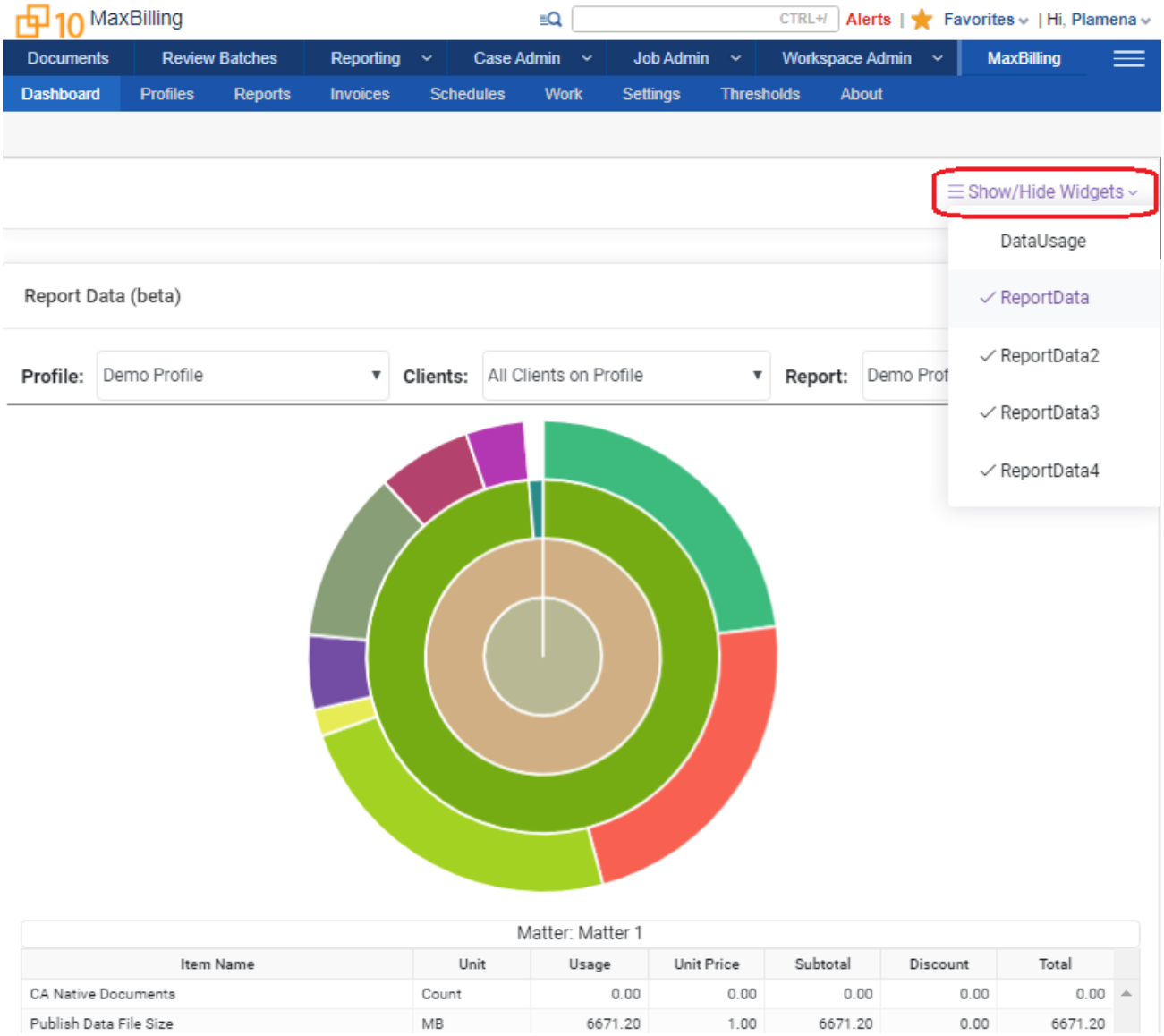


Dashboard

Report Data

To view **Report Data** widgets, navigate to **Dashboard** tab and click ***Show/Hide Widgets*** on the right. Select a **Report Data** widget.

You can add up to 4 **Report Data** widgets.



Select **Profile**, **Clients** and **Report** in the dropdowns to specify which report you would like to be shown.

Click on the chart to load all the layers of the chart – Total, Client, Matter, Workspace.

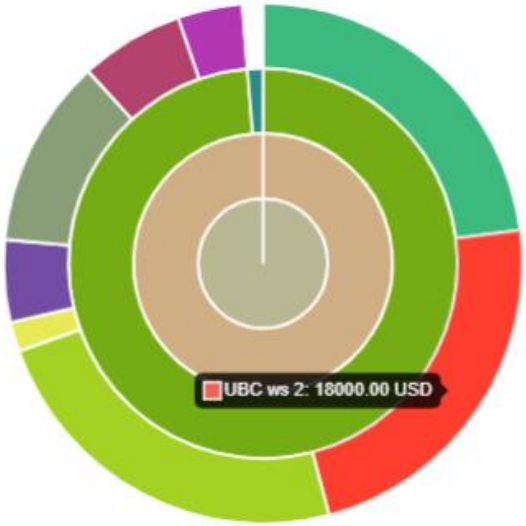
The table below the chart shows detailed report information for the corresponding part of the layer.

Hover on the specific part of the chart to see the report total for the related report, Client, Matter or Workspace.

Note: To be able to view the Workspace layer, you should be viewing a report with a Workspace Breakdown. Respectively – to be able to view the Matter layer, you should be viewing a report with a Matter or a Workspace Breakdown.

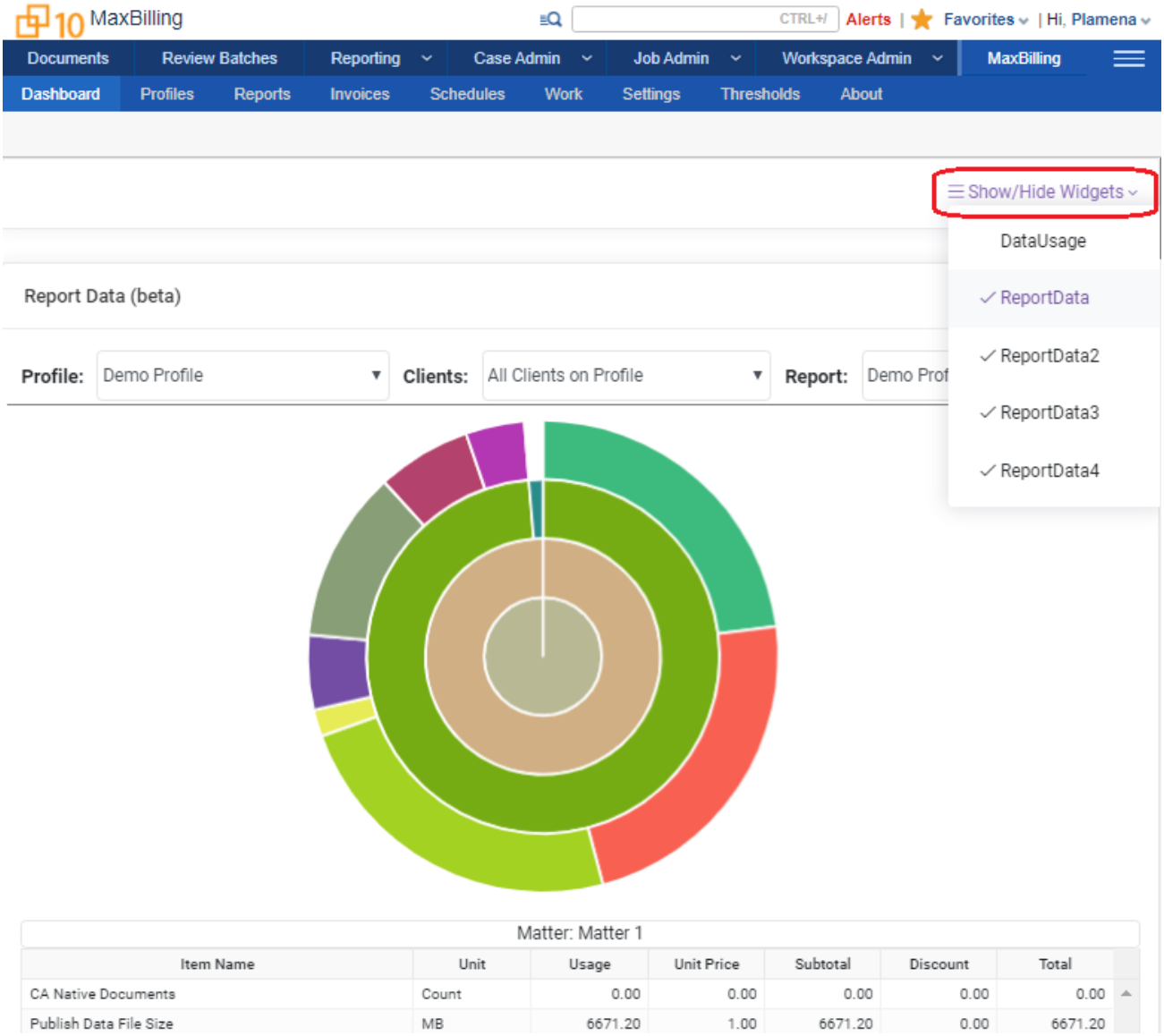
Report Data (beta)

Profile: Demo Profile **Clients:** All Clients on Profile **Report:** Demo Profile (20200401-20200514)



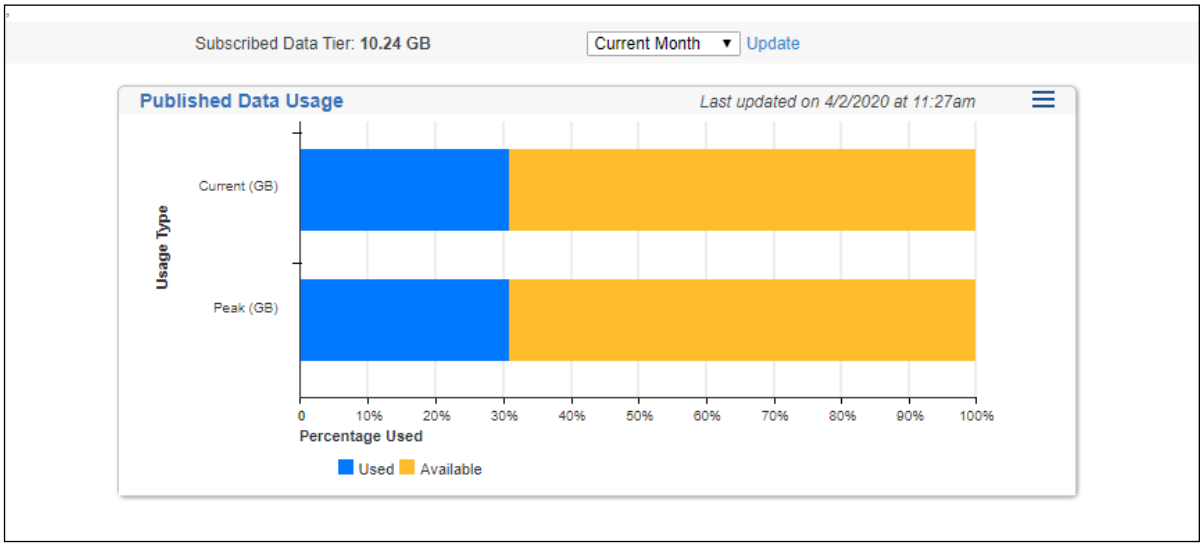
Workspace: UBC ws 2

Item Name	Unit	Usage	Unit Price	Subtotal	Discount	Total
CA Native Documents	Count	0.00	0.00	0.00	0.00	0.00
Publish Data File Size	MB	747.26	1.00	747.26	0.00	747.26
Total File Size	MB	734.46	1.50	1101.69	0.00	1101.69
Document Size Text Only	MB	12.80	1.50	19.20	0.00	19.20
Total File Count [0 - 50.00]	Count	50.00	10.00	500.00	0.00	500.00
Total File Count [50.00 - 100.00]	Count	50.00	5.00	250.00	0.00	250.00



Usage Data

To view **Usage Data** widget, navigate to **Dashboard** tab and click ***Show/Hide Widgets*** on the right. Select a **Usage Data** widget.



The Usage Data view shows:

- **Subscribed Data Tier** - the size of the data given for your usage (based on **Data Tiers** value MaxBilling **Settings** tab).
- **Period dropdown** - choose from when you want to see the data usage.
  - **Current Month** - shows the usage data for the current month.
  - **Last 30 days** - shows the usage data for the last 30 days.
- **Published Data Usage** - all files that are Published.
  - **Current** - the current published data used for the period.
  - **Peak -** the peak of published data usage within the period.

Bar Chart Display Type

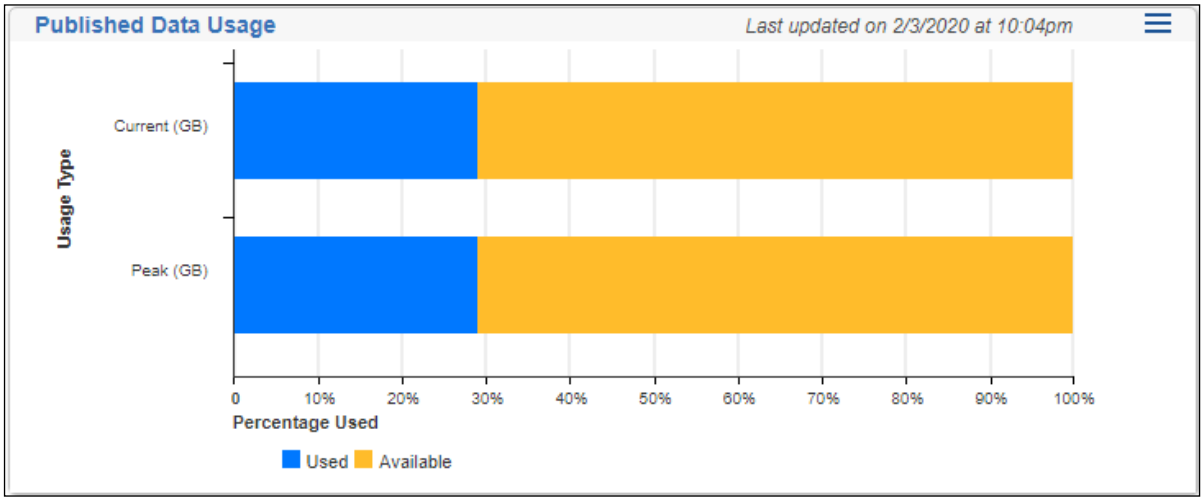
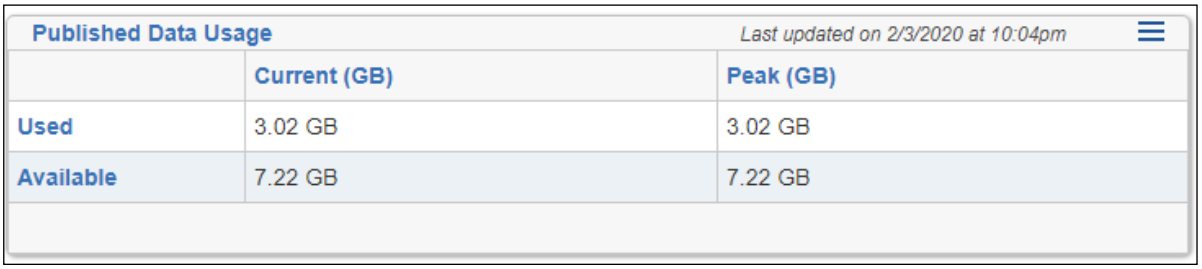


Table Display Type



Published Data Usage	Last updated on 2/3/2020 at 10:04pm	
	Current (GB)	Peak (GB)
Used	3.02 GB	3.02 GB
Available	7.22 GB	7.22 GB

Uninstalling MaxBilling

To uninstall **MaxBilling**:

1. Delete all **MaxBilling** agents.
2. Uninstall the **MaxBilling** Relativity® application from the workspace.
3. Delete all **MaxBilling** resource files.

Relativity® disclaimer

Relativity® and its support team carry no responsibility towards this product. This product may only be used by parties with valid licenses for Relativity®, a product of Relativity® Corporation.

Appendix A – Default Pricing Items

Case Rollup pricing items description

Metric Type	Description	Pricing Units
DtSearch Index Size	The peak* total DT Search Index size for all DT Search Indexes for the corresponding workspace.	GB, MB, KB
Image File Count	The peak* count of image files in the workspace.	Count, In Whole
Image File Size	The peak* size of image files in the workspace.	GB, MB, KB
Native File Count	The peak* count of native files in the workspace.	Count, In Whole
Native File Size	The peak* size of native files in the workspace.	GB, MB, KB
Production File Count	The peak* count of production files in the workspace.	Count, In Whole
Production File Size	The peak* size of production files in the workspace.	GB, MB, KB
Extracted Text Size	The peak* size of extracted text in the workspace.	GB, MB, KB
Total File Size	The peak* total file size of files in the workspace. This value only counts items in the file table and doesn't include container files in the repository.	GB, MB, KB
Total File Count	The peak* count of the total number of files in the workspace.	Count, In Whole
LDF Size	The peak* database log data file (LDF) size of the workspace.	GB, MB, KB
MDF Size	The peak* database master data file (MDF) size of the workspace. **Note**: If your MDF is split into multiple NDFs, the sum of all NDF sizes is returned.	GB, MB, KB
Available DB Size	The space available for the workspace database at the time the peak database size was captured.	GB, MB, KB
Used DB Size	The peak* size of the workspace database.	GB, MB, KB
Document Count	The total document count in the workspace.	Count, In Whole
Document Count Text Only	The total document count of the documents that do not have Native files.	Count, In Whole
Document Size Text Only	The peak for the Document Size Text Only. One document is considered 1/4000 GB.	GB, MB, KB
Full Text Data File Size	The peak size of the Full Text catalog.	GB, MB, KB
Publish Data File Size	The peak size of the Published files (published size is considered as sum of Total (billable) file size + Document size text only).	GB, MB, KB
Stage Fence Data File Size**, ***	The peak size of the Stage Fence data.	GB, MB, KB

*** Peak value is the maximum value of a given pricing item (for the specified time period).**

**** Available in Relativity®One only.**

*** By definition, Stage Fence data is not related to any Client, Matter or Workspace in Relativity®One, as it is data that is not imported/created in Relativity®One yet. To be able to charge for Stage Fence data, it

should be stored in a specific folder structure in the FileShare servers in order to be linked to the corresponding Workspace. A new folder **StageFenceWorkspaces** should be created on each host. Then sub-folders named after the **Workspace Artifact IDs** should be created in it (at least for the Workspaces that are intended to be charged for Stage Fence data). The Stage Fence data for the relevant workspace must be stored in its designated folder. Only stage fence data that is stored in the way described above will be considered for the Stage Fence Data File Size pricing item in MaxBilling. Any other stage fence data (anywhere else in the FileShare) will not be considered for the Stage Fence Data File Size pricing item in MaxBilling.

Case Flow pricing items description

Metric Type	Description	Pricing Units
OCR File Count	The count of completed OCR files.	Count, In Whole
OCR File Size	The OCR-ed text size of the completed files within OCR sets.	GB, MB, KB
Image File Count *	The file count of completed Imaged documents.	Count, In Whole
Image File Size *	The file size of completed Imaged documents.	GB, MB, KB
Production Set File Count	The count of produced files.	Count, In Whole
Production Set File Size	The size of produced files.	GB, MB, KB
ECA Promotion File Count (Inbound)	File count of the documents promoted from one Workspace to another Workspace via RIP.	Count, In Whole
ECA Promotion File Size (Inbound)	File size of the documents promoted from one Workspace to another Workspace via RIP.	GB, MB, KB
RDC Import File Count **	File count of the documents (images or natives) imported via RDC (Image Load File, Document Load File, Production Load File) using a load file with the following formats: *.txt, *.csv, *.opt, *.dat.	Count, In Whole
RDC Import File Size **	File size of the documents (images or natives) imported via RDC (Image Load File, Document Load File, Production Load File) using a load file with the following formats: *.txt, *.csv, *.opt, *.dat.	GB, MB, KB
Production Branding Count	The count of production brands per page.	Count, In Whole

*** Imaging Sets are considered. Imaging On the Fly and Mass Operation Imaging are not considered.**

*** * Statistics collection for these items uses audit information from SQL DB.**

Analytics pricing items description

Metric Type	Description	Pricing Units
CA Non Native Documents Size	Peak* size of Non Native documents that were indexed with Content Analyst for first time, during the reported period.	GB, MB, KB
CA Index Size On Disc	The total CA index size on disk for all CA indexes which exist in Relativity.®	GB, MB, KB
CA Native Size	Peak* size of all Native documents indexed with Content Analyst for first time, during the reported period.	GB, MB, KB

CA Non Native Documents	Peak* number of Non Native documents that were indexed with Content Analyst for first time, during the reported period.	Count, In Whole
CA Native Documents	Peak* number of Native documents that were indexed with Content Analyst for first time, during the reported period.	Count, In Whole
CA Total Documents	Peak* total number of all documents run through a Content Analyst Index for the first time, during the reported period.	Count, In Whole

***Peak values are based on a daily collection by Case Statistics and MaxBilling Daily Statistics agents.**

Peak value is the maximum value of a given pricing item (for the specified time period).

Processing pricing items description

Metric Type	Description	Pricing Units
All Native File Count	The count of all native files (including duplicates and containers) as they exist after decompression and extraction.	Count, In Whole
All Native File Size	The sum of all native file sizes (including duplicates and containers), as they exist after decompression and extraction.	GB, MB, KB
Container count	The count of all native files classified as containers before extraction/decompression, as they exist in storage. This also includes nested containers that haven't been extracted yet.	Count, In Whole
Container size	The sum of all native file sizes, classified as containers before extraction/decompression, as they exist in storage. This value may be larger than the preprocessed file size because it also includes nested containers.	GB, MB, KB
Discovered document count	The count of all the native files discovered that aren't classified as containers as they exist in storage	Count, In Whole
Discovered document size	The sum of all native file sizes discovered, that aren't classified as containers as they exist in storage.	GB, MB, KB
Discovered Files	The count of all discovered files.	Count, In Whole
Duplicate file count	The count of duplicate native files associated to the user, processing set and workspace.	Count, In Whole
Filtered file count	The count of all files excluded from discovery by way of an exclusion filter after inventory.	Count, InWhole
Filtered file size	The sum of all the file sizes, excluded from discovery by way of an exclusion filter after inventory.	GB, MB, KB
Inventoried files	The count of all files found during an inventory run.	Count, In Whole
Nisted file count	The count of all files denisted out during discovery.	Count, In Whole
Nisted file size	The sum of all the file sizes, denisted out during discovery	GB, MB, KB
Preprocessed file count	The count of all native files before extraction/decompression, as they exist in storage.	Count, In Whole
Preprocessed file size	The sum of all the native file sizes, before extraction/decompression, as they exist in storage.	GB, MB, KB
Published documents	The count of published native files associated to the user, processing set and workspace	Count, In Whole
Published document size	The sum of published native file sizes, associated to the user, processing set and workspace.	GB, MB, KB

Storage file size	The sum of all file sizes, as they exist in storage after publishing. This is the total file size minus any files that were ingested twice. This value only counts the file once, ignoring duplicates.	GB, MB, KB

Users pricing items description

Charge Type	Description
User Charge - Logged in	Any users who have logged in to Relativity®.
User Charge - Had Access	Any users who was with enabled Relativity® access for at least one day.

Tasks pricing items description

Metric Type	Description
Custom Task	To charge the client for something out of the predefined Relativity® pricing metrics.