



# CounselLink<sup>®</sup>

Law Firm User Guide  
For Travelers



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# Contents

Getting Started with CounselLink .....	3
CounselLink Process: At-a-Glance .....	4
CounselLink Registration .....	5
<i>Already Registered?</i> .....	5
<i>New Registration</i> .....	5
<i>Acknowledge Terms &amp; Conditions</i> .....	7
<i>Two-Factor Authentication Security</i> .....	7
Enter Taxpayer ID Number .....	7
Tax Settings Configuration on Law Office Profile .....	8
Add Timekeepers .....	8
<i>Add an Individual Timekeeper</i> .....	8
<i>Import Multiple Timekeepers from Template</i> .....	9
Timekeeper Rates .....	10
<i>Client Enters Rates</i> .....	10
<i>Law Firm Enters Rates</i> .....	10
Add Discounts to Fee Offer .....	12
Billing Guidelines Acknowledgement .....	13
Client Action .....	13
Matter Assignments .....	14
<i>Client Configures Automatic Matter Acceptance</i> .....	14
<i>Accept a Matter Assignment</i> .....	14
Creating an Additional Office .....	14
Invoice Processing .....	15
Preferred Invoice Submission Method .....	15
<i>Upload a Structured Data (LEDES) File to CounselLink</i> .....	15
Alternate Invoice Submission Methods .....	16
<i>Create Invoice in CounselLink</i> .....	17
<i>Email or Mail Invoice</i> .....	18
Stages of Invoice Review .....	18
Invoice Statuses .....	18
Adjusting Fees and Rates .....	19
Search for a Fee Offer .....	19
Update a Fee Offer .....	20
View the Status of Fee Offers .....	20
Resolve Rejected or Partially Approved Fee Offers .....	20
Search to Find the Records You Need .....	21
Search Methods .....	21
<i>Home Page Links</i> .....	21
<i>Quick Search Bar</i> .....	21
<i>Search Pages</i> .....	21
Working with Search Results .....	22
<i>Navigate the Search Page</i> .....	22
<i>Keyword Search Tips</i> .....	22
<i>Use the Filter Panel</i> .....	23

<i>Configure Search Results</i> .....	23
<i>Sort Search Results</i> .....	23
<i>Complete Actions from the Search Results</i> .....	24
<i>Print or Export Search Results</i> .....	24
<i>Save a Search</i> .....	24
Support Resources .....	25
Training .....	25
Attorney Implementation Support .....	25
Customer Support.....	25
<i>Phone Support</i> .....	25
<i>Email Support</i> .....	26

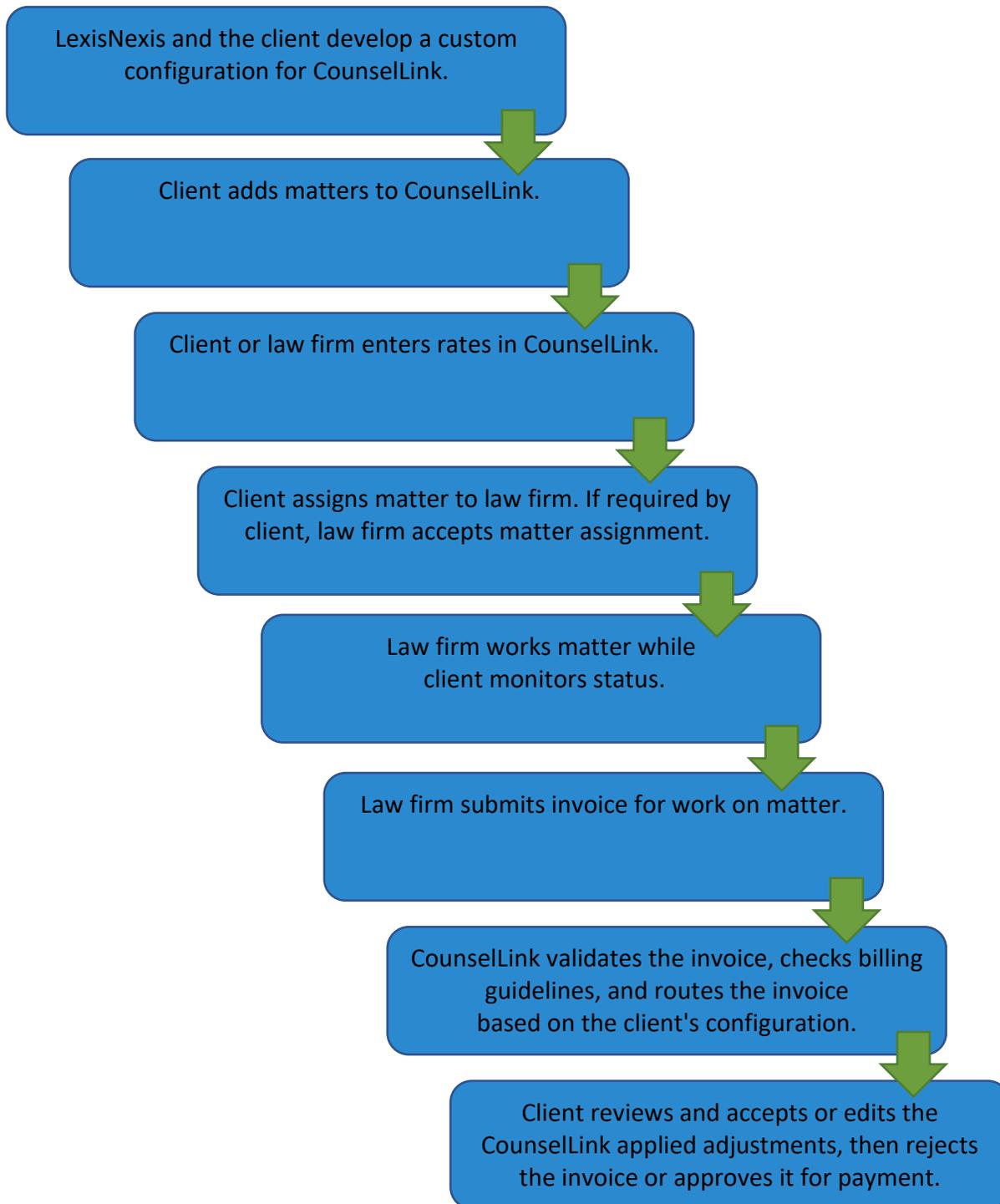
## Getting Started with CounselLink

Welcome to CounselLink. This guide contains information to help you register your law firm, configure your office profile and begin submitting invoices to your corporate client. In addition, it contains some tips to help you better understand the invoice review process and work with records in CounselLink.

## CounselLink Process: At-a-Glance

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Below is the basic CounselLink workflow process between clients and law firms.



## CounselLink Registration

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### ***Already Registered?***

Please note that CounselLink has multiple websites. It is important that for this client you log on to <https://www-p2.counselink.net>. Don't forget to bookmark this website for easy future access.

If you already have a CounselLink account, you do not need to complete the registration process again. Follow your client's instructions for having your account connected to theirs or contact the [Attorney Implementation team](#) for assistance. Once your account is linked to your client's, you can skip to the **Add Timekeepers** section of this guide.

**Note:** If you have forgotten your username or password, click the applicable **Forgot Username** or **Forgot Password** link and CounselLink will email instructions to assist you.

### ***New Registration***

Register your law firm with CounselLink as requested by your client. If you need assistance with the registration process, call the Customer Support phone number that is provided at the bottom of each screen.



1. Go to [www-p2.counselink.net](http://www-p2.counselink.net) (**Travelers uses a separate CounselLink website**), and click the **Sign Up** link.
2. Enter your firm's information, including the firm name, firm type, client name, firm address, phone number and payment details. Then click **Next**.
3. Type your **First Name**, **Last Name**, **Email Address**, and **Timekeeper Level** to create your administrator profile. With this role, you can add timekeepers, enter rates and perform other administrative tasks later.
4. Select the box to **Create Username & Password Now**. Enter your login credentials or choose to have CounselLink email you a system generated Username and a link to create a password later. Don't forget to make note of the **Secret Question** you select and the answer you enter, as this must be provided if you need to reset your password later.

- The first time you sign into CounselLink the Terms & Conditions will display. Please review the CounselLink Privacy Policy and Terms and Conditions, then select the **I agree to the CounselLink Privacy Policy and Terms and Conditions** checkbox
- Click the **Submit** button. The CounselLink Home page displays.

**CounselLink Registration**  
 Registering for CounselLink is an easy step-by-step process. Let's get started with your firm's information.

**Tell us about yourself and your client**

Firm Name \*  
 Test Law Firm

Firm Type \*  
 Legal Services

Client Name \*  
 Test

**Where is your firm located?**

Country \*  
 UNITED STATES

Street Address \*  
 123 ABC

Street Address, Building, Apt., Floor, Suite, etc.

City \*  
 San Diego

State \* (US Only)  
 California

Zip/Postal Code \*  
 92111

Telephone \*  
 888 888 888

Extension (Optional)

Fax (Optional)

Remit payment to a different address

**Payment Details**

Preferred Currency \*  
 US Dollar

Taxpayer ID (Optional)

**Next** Cancel

Need Help?  
 United States 1.800.600.2282  
 International +1.919.378.2713

*Add Law Firm Information page*

**CounselLink Registration - Step 2**  
 By creating your CounselLink profile now you will be given administrator privileges allowing you to configure CounselLink and create other users.

**Create your CounselLink Profile**

\* Required Fields

First Name \*  
 [Empty field]

Last Name \*  
 [Empty field]

Email Address \*  
 [Empty field]

Timekeeper Level (Optional)  
 [Empty dropdown]

Create Username & Password Now

**Submit** Cancel

Need Help?  
 United States 1.800.600.2282  
 International +1.919.378.2713

*Create Admin User Profile page*

## Acknowledge Terms & Conditions

The first time you log on to CounselLink the Terms & Conditions will display. Please review, click **'I Agree'** to the CounselLink Terms & Conditions of use box. You will now be on the CounselLink HOME page.

# Matters Invoices Fees Calendar Profiles Info Center

### Terms & Conditions

The CounselLink Terms and Conditions Policy is required to be accepted before CounselLink can be accessed and/or used. If you have questions or need further clarification, contact customer support.

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I Agree  Decline

## Terms & Conditions page

## Two-Factor Authentication Security

CounselLink utilizes multi-factor authentication to help safeguard against attackers gaining access by enforcing a secondary means of authentication from a verifiable device. With Two-Factor authentication enabled, you'll enter your normal CounselLink password when logging in. Once you enter your password, CounselLink will send a verification code to your preferred method (email or mobile). Once you enter your verification code you will be logged into CounselLink.

## Enter Taxpayer ID Number

Travelers **requires** you enter your Taxpayer ID number in CounselLink. This field is located at the bottom of your **Law Firm Profile** screen. If you are already registered, you may access the TID field:

- Clicking the link under **Law Firm**

- Click the first **Edit** button
- Enter the number and click **Save**

The screenshot shows a form with a header bar containing 'Save' and 'Cancel' buttons. Below the header, the title 'Address Information' is on the left, and 'Taxpayer ID:' is followed by an empty input field on the right. A red arrow points to the top right corner of the form area.

## Tax Settings Configuration on Law Office Profile

---

If your firm’s services are subject to **VAT/GST Taxes**, or you tax Clients for services, you **must** configure settings in Counsellink. To configure, click the Office profile link, click the first ‘Edit’ button, and change Tax settings to ‘Yes’ as applicable, and then click ‘Save’.

The screenshot shows a form titled 'Law Office Settings'. It contains three rows of settings, each with a radio button selected for 'Yes' and an unselected 'No' option. Red arrows point to the 'Yes' radio buttons for the first two rows.

<b>Tax Clients for Services:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Services Subject to VAT/GST Taxes:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Accept New Assignments:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No

## Add Timekeepers

---

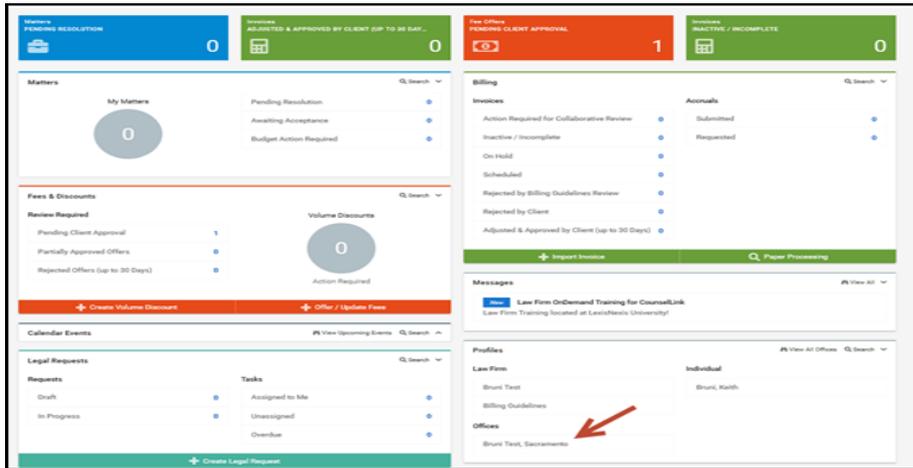
The term Timekeeper or User refers to anyone who does billable work for a client. Official titles for people who are considered Counsellink timekeepers may include but are not limited to attorneys, paralegals, legal assistants, consultants, etc. Timekeepers must be added to Counsellink before charges can be added for them on any invoice.

If you find a duplicate office has been created with 3 initials at the end of the name:

- **Do NOT delete this duplicate office**
  - You will receive specific instructions regarding this office
- **Do NOT use the office with initials for Travelers**
  - The original office is assigned to Travelers
- Add Travelers timekeepers to the original office without initials.

### **Add an Individual Timekeeper**

1. In the Profiles section of the Home page under the Offices label, click your law firm office link.



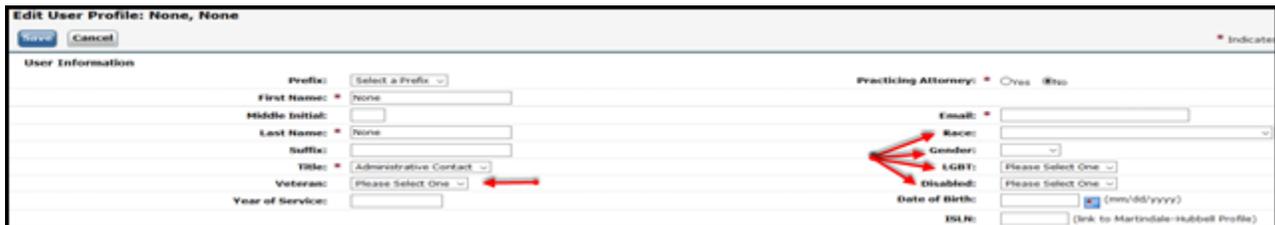
2. Scroll down to the **Office Staff** section of the profile and click **Add User**.



3. On the Add New Individual page, complete all the required fields, as denoted by the red asterisk (\*).

Please note the following:

- If the biller is an attorney, change **Practicing Attorney** to YES. Otherwise leave the default setting of NO.
- Change **Activate Login** to YES only if this person needs to log into Counsellink. Most timekeepers do not need access. If the default remains NO, an **email address** is not required.
- Some clients require that you complete the **Veteran, Race, Gender, LGBT** and **Disability** fields. Please refer to your registration request email to determine if your client requires these fields.



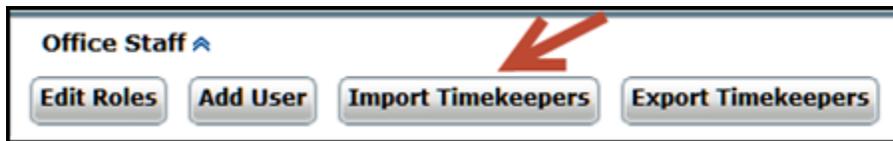
- The **Primary Timekeeper ID** must match the identifier used on your invoices for this biller. The ID can be numbers, letters or a combination of both.



4. Click **Save**
5. If the timekeeper is a practicing attorney, a Roles screen displays. Do not change the default settings - click **Save**
6. Repeat these steps to add all timekeepers who will bill the client

### **Import Multiple Timekeepers from Template**

If you have many timekeepers to enter, you can use a template to import them as a group.



1. From the law office profile, scroll down to the Office Staff section and click **Import Timekeepers**.
2. If no timekeepers have been entered previously, click **Blank Template**. If some timekeepers have been entered already, click **Existing Timekeepers**. The Microsoft Excel template downloads to your computer.



3. Open the file and enter the timekeeper information. See the **Example and Details** worksheet tab for formatting examples. Then save the file.
4. In CounselLink, return to Timekeeper Data Import page and click the **Browse** button.
5. Locate and select the Excel file from where it is saved on your computer.
6. Click **Import**.
7. View the **Data Import Summary** section and choose how to proceed.
  - a. Click the **View Status Report** for more details if import errors occurred. Fix the errors on the template and attempt the import again.
  - b. If no errors occurred, click **Continue** to complete the import.
8. Click **Done**.

## Timekeeper Rates

---

Travelers users numerous fee structures to assign matters in CounselLink. Most are configured as 'Client Controlled', meaning they will enter rates on behalf of the firm. However, some are configured as 'Law Firm Controlled', meaning you must enter rates. These fee structures will display an 'Add Fee Offer' button only if you may enter rates.

### **Client Enters Rates**

Travelers will enter rates. No action is required by you. If your client has had a fee structure configured so they enter rates, no 'Add Fee Offer' button will display to you. The client will enter rates and no action will be required by you in this section. You have completed the registration requirements for your client. Once your client completes this step, matters can be assigned to your CounselLink account and invoicing can begin.

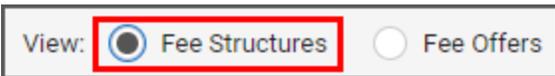
### **Law Firm Enters Rates**

If your client has requested that you enter rates for your timekeepers, LexisNexis must assign your law firm to your client in CounselLink before you can complete this step. To expedite this process, you may contact Attorney Implementation at [attorneyimplementation@lexisnexis.com](mailto:attorneyimplementation@lexisnexis.com).

Once LexisNexis has completed the assignment, log into CounselLink to enter the timekeeper rates:

1. Confirm that your client's name displays in the upper left corner of your CounselLink Home page. If not, select **Travelers** from the drop-down list.

- Click the **Fees** tab. In the top right corner, confirm the **Fee Structures** view is selected.



- If you have multiple offices registered, select a **Law Firm Office Name** in the filters panel. Fee structures for the selected office will display. If you do not find the fee structure you need, contact [Attorney Implementation](#).
- Click the **Fee Structure ID** link. The Fee Structure Overview page displays.

<input type="checkbox"/>	Fee Structure Id	Fee Structure Name
<input type="checkbox"/>	5238	Detailed Hourly Fee Arrangement

- Select the **Fee Offers** tab

Fee Structure: 5238 ACTIVE  
 In Use By: T&D Inc.

---

**Fee Structure Information**

Fee Structure ID 5238	Fee Structure Currency US Dollar
Fee Structure Name Detailed Hourly Fee Arrangement	Group Type Private
Fee Offers Controlled By Law Firm	Area of Law General
	Matter Type General

---

Stage Structure Fee Offers 

Current and Future Offers (0)

+ Add Fee Offer  Filter Offers by Type

Group By: None

Fee Offer ID	Effective Date	Status

- Click the **Add Fee Offer** button. The **Create Fee Offer** screen displays.
- Effective Date:** Leave the default date set to the current date.
- Fee Offer Currency:** Select if different from the default value.
- Offered Counties:** Leave the default state and counties of **N/A - N/A**.
- Stage Structure:** Enter rates in each of the three Offered Amount boxes for **Partner Rate**, **Associate Rate**, and **Paralegal Rate**.
- Timekeepers:** Enter the timekeeper’s hourly rate in the Rate box for each individual timekeeper that will be billing for this client’s matters. Note: If a listed timekeeper will not bill this client, leave their box blank. **Do not enter \$0.**

**Create Fee Offer**  
In Use By T&D Inc.

**Fee Offer**  
 Effective Date   
 Fee Offer Currency   
 Reason for Fee Offer

**Fee Structure**  
 Fee Structure Name: 5238 - Detailed Hourly Fee Arrangement  
 Fee Structure Currency: US Dollar  
 Group Type: Private  
 Area of Law: General

**Stage Structure**

Line #	Stage	Fee Type	Offered Amount
1	Detailed Hourly Rates	Detail Billing	Enter values below
Rate Structure			Offered Amount
Partner Rate			<input type="text"/>
Associate Rate			<input type="text"/>
Paralegal Rate			<input type="text"/>

**Timekeepers**  
 Download Timekeeper Rates Template | Upload Timekeeper Rates  
 Group By: Timekeeper Level

Timekeeper	Initials	Rate	Reason for Rate Change
Timekeeper Level: Associate			
User, Admin	ADM	<input type="text"/>	<input type="text"/>
Timekeeper Level: Partner			
Partner, Larisa	PLP	<input type="text"/>	<input type="text"/>

2 items | Show 200

12. Click **Save**, then **OK**. The fee offer will show a 'Pending Approval' status. Counsellink notifies your client that your rates are ready for their review.

**Note:** If your client requires that their Billing Guidelines be acknowledged online, a notification displays at the top of the screen. See instructions below for how to **Acknowledge Billing Guidelines**.

13. Repeat the Add Fee Offer process for each Fee Structure / Law Firm Office that your client has requested.

## Add Discounts to Fee Offer

After a fee offer has been added, you can enter discount terms.

Select the **Fees** tab. The Fee Search page displays

1. In the upper-right corner, select the **Fee Offer** option

View:  Fee Structures  **Fee Offers**

2. Click the **Fee Offer ID** link. The Fee Offer Overview page displays

	Fee Offer Id	Fee Structure Name	Fee Structure Id
<input type="checkbox"/>	<b>5028408939</b>	Detailed Hourly Fee Arrangement	5238

3. Counsellink provides different types of discount formats. In the **Discounts** section click **Create Discount**, select the applicable discount links.

- **Prompt Approval Discount:** On the Edit Prompt Approval Discount screen, enter the discount terms and settings, then click **Save**

- **Discount Terms:** On the Edit Discount Terms screen, enter the discount terms as a percentage of Fees, Expenses or both, then click **Save**

Create Discount
✕

**+**

**Create Prompt Pay Discount**

"Prompt Pay Discounts" encourage quick payments and can save your company money if you have an agreement with the Firm and can make quick payments.

OR

**+**

**Create Discount Terms**

Requires special Rule configuration. Ensures invoice level discounts do not exceed any defined "Discount Terms". Contact Customer Service for additional information.

Cancel

## Billing Guidelines Acknowledgement

Travelers require you review and acknowledge their Travelers Retention and Billing Policy on-line. To access the guidelines:

1. Select to the **Info Center** tab
2. Click the **Billing Guidelines** link

Document Name	Acceptance	Last Publish...	Due Date	Status	Accepted On	Accepted By
Travelers Legal Retention and Billing Guidelines - US Domestic 6.1.2019 - Canada and Europe 3.1.2018	Required	06/01/2019	02/07/2020	Pending		Accept

3. The billing guidelines can be printed by clicking the Print link in the upper right corner of the page
4. The Billing Guidelines Agreement Confirmation displays
  - a. Select the check box in the Acknowledge box
  - b. Click **Accept**

**Acknowledgement**

I hereby acknowledge my understanding of, and agreement to, these outside counsel & vendor Billing Guidelines, and certify that I have the authority to enter into this agreement on behalf of the law firm or legal vendor set forth below.

Accept
Decline

## Client Action

The next two steps **MUST** be completed by your client before you can begin invoicing. They are:

1. Enter rates and complete internal set-ups
2. Assign matters to your CounselLink account

## Matter Assignments

---

Once rates have been entered and approved, your client will assign matters to you. The matter must be accepted before invoices can be submitted. Some clients configure CounselLink to automatically complete the matter acceptance step, while others require the law firm to manually accept the assignment. An email notification with instructions is sent to the law firm each time new matters are assigned. Follow the instructions in the email.

### **Client Configures Automatic Matter Acceptance**

If your client configured CounselLink to automatically complete the matter acceptance step on behalf of law firms, no action is required in this section. Once you receive notification that a matter has been assigned, you can access it from the CounselLink Home page.

### **Accept a Matter Assignment**

If your client configured CounselLink to require law firm acceptance of the matter assignment, complete the following steps:

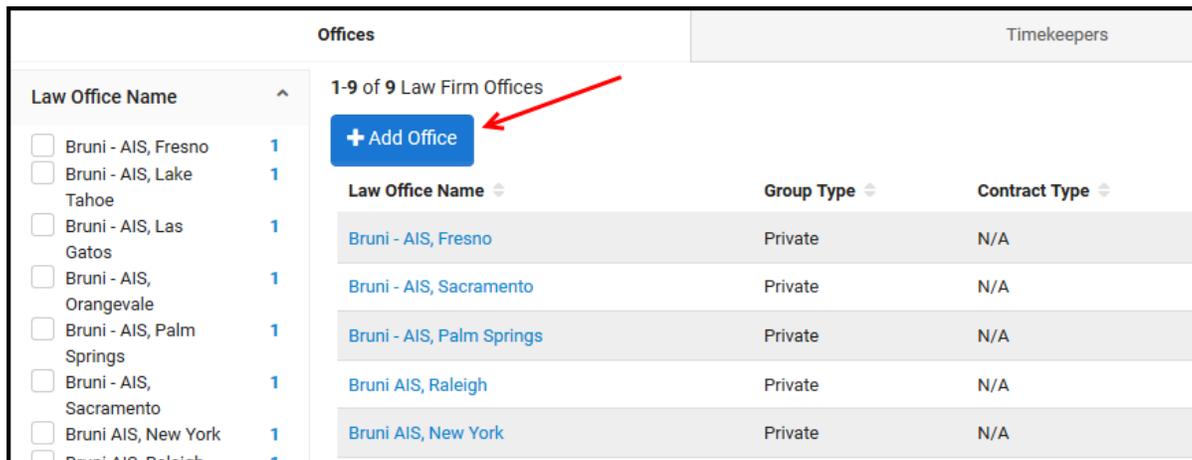
1. Select the **Awaiting Acceptance** link in the Matters section of the Home page.
2. On the Matter Search page, select the check box adjacent to the matter.
3. Click the **More Actions** button and select **Accept Assignment**.

## Creating an Additional Office

---

If an additional office needs to be created, perform the following:

1. Click the **Profiles** tab from the **Home** Page.
2. Click the **“Add Office”** button.



Offices		Timekeepers	
Law Office Name	1-9 of 9 Law Firm Offices		
<input type="checkbox"/> Bruni - AIS, Fresno	<a href="#">+ Add Office</a>		
<input type="checkbox"/> Bruni - AIS, Lake Tahoe			
<input type="checkbox"/> Bruni - AIS, Las Gatos			
<input type="checkbox"/> Bruni - AIS, Orangevale			
<input type="checkbox"/> Bruni - AIS, Palm Springs			
<input type="checkbox"/> Bruni - AIS, Sacramento			
<input type="checkbox"/> Bruni AIS, New York			
<input type="checkbox"/> Bruni AIS, Raleigh			
	<b>Law Office Name</b>	<b>Group Type</b>	<b>Contract Type</b>
	Bruni - AIS, Fresno	Private	N/A
	Bruni - AIS, Sacramento	Private	N/A
	Bruni - AIS, Palm Springs	Private	N/A
	Bruni AIS, Raleigh	Private	N/A
	Bruni AIS, New York	Private	N/A

3. Enter in the new office information. Check the **“Remit To”** box if the remit to address is the same. If it is different, leave the box unchecked and fill in the correct remit to address.

**Create Law Office**

\* Indicates Required Fields

Address Information	
Taxpayer ID:	<input type="text"/>
Law Office Name: *	<input type="text"/>
Office Address: *	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
City: *	<input type="text"/>
Country: *	UNITED STATES
State/Province: *	Alabama
Zip/Postal Code:	<input type="text"/>
Phone: *	<input type="text"/> Ext: <input type="text"/>
Fax:	<input type="text"/>
Preferred Currency: *	US Dollar

Remit To:  Same as Law Office Address

Remit To Address: \*

City: \*

Country: \*

UNITED STATES

State/Province: \*

Alabama

Zip/Postal Code:

Phone: \*

Ext:

Fax:

#### 4. Click Save

Once you have created the new office(s), you can then add any timekeepers that bill your client to their respective offices and submit their rates.\*

\*Once you have added a new office profile, it will need to be associated with your client. Please email [attorneyimplementation@lexisnexis.com](mailto:attorneyimplementation@lexisnexis.com) to have this step completed.

## Invoice Processing

Your client uses CounselLink to receive and process all legal invoices. All invoices must be submitted through CounselLink. **Invoices received for matters that have not been assigned through CounselLink will be rejected.**

**Note:** Detailed instructions for submitting invoices, troubleshooting rejected invoices, and many other topics are available from the **Help (?)** link located in the upper right corner of every screen.

### Preferred Invoice Submission Method

To secure prompt and accurate payments to your firm, upload invoices using the structured data (LEDES) format. This is the preferred invoice submission method. CounselLink also accepts invoices submitted by mail, email, and those created directly in CounselLink.

#### Upload a Structured Data (LEDES) File to CounselLink

1. Log into <https://www-p2.counselink.net>
2. Export the invoice from your time and billing software to the LEDES (ASCII) structured data format. **Examples LEDES 1998B, 1998BI, 2000 and XML 2.1**
3. From the Billing section of the CounselLink Home page, click the **+ Import Invoice** button.
4. You can upload one or more invoice files at once.
  - a. In the Invoice Files section, click the **Choose File** button to the right of the File 1 label.
  - b. Browse to locate the saved LEDES invoice file and select it.
  - c. Click **Open**.
  - d. Repeat the file selection process for each additional invoice. If you need to attach more than 5 files, click the **Add Another File** button.
  - e. Complete any other necessary information on the Import Invoice page.
  - f. Once you have specified all your invoices, click **Next**.

**Import Invoice**

Click "Browse" to select a file. You can import invoice files up to a total of 10MB.  
CounselLink accepts: LEDES 1998B, 1998BI, 2000, XML 2.1 and Examen SDF.

**Invoice Files**

<b>File 1:</b> *	Choose File	No file chosen	
<b>File 2:</b>	Choose File	No file chosen	Remove
<b>File 3:</b>	Choose File	No file chosen	Remove
<b>File 4:</b>	Choose File	No file chosen	Remove
<b>File 5:</b>	Choose File	No file chosen	Remove

Add Another File

**LEDES 98B Options**

File contains a non-USD invoice:

Add tax to an invoice:

5. If data errors are found, the Import Invoice Status screen appears.
  - a. To see all errors, click **View Status Report**. Read the error messages. For more information, click the message number link. Click **Close** to return.
  - b. To remove an invoice from the upload process due to errors, click the check box near the invoice number and click **Delete**.
  - c. To continue with the upload process, click **Continue**.
6. Confirm or change the **Invoice Currency**. CounselLink will provide the Exchange Rate.
7. Confirm or change the **Fee Tax** and **Expense Tax**.
8. Click **Continue** when all data appears correct.
9. If your client requires additional information on invoices, click the check box near the invoice number, and then click **Add Additional Information**. Fill out the fields on the page. For questions on this data, please contact the client.
10. To provide a document with the invoices such as a receipt, click the check box near the invoice number, and click **Document Attach**.
  - a. Click **Browse** to locate your document.
  - b. Type a **Document Name**.
  - c. If you need to attach more documents, click the **Attach Another Document** button.
  - d. Click **Submit**.
11. At the Final Review page, click **Send** to make the invoice available to the client. The Import Invoice – Confirmation information displays. Review the confirmation page.
12. Click **Done** to finish the invoice upload process.

**Note:** After upload, CounselLink checks the invoice against the client's billing guidelines. The individual who uploads the invoice will receive a status email regarding the guideline review. This email indicates the number of invoices sent to the client or held. It will also indicate if any billing guideline errors were found or if the client requires additional information. If guideline errors were identified, your invoice will be rejected. You can access the invoice from the **Rejected by Billing Guidelines Review** link on the Home page. Fix the errors and submit the invoice again.

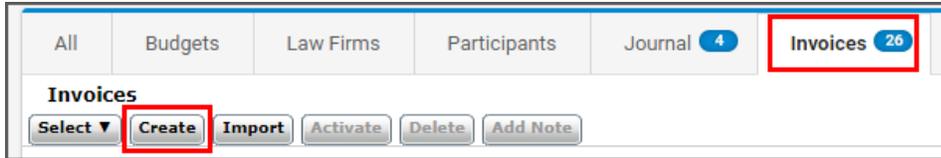
## Alternate Invoice Submission Methods

If you are not able to upload a structured data (LEDES) file, use one of these alternate methods to submit your invoices to CounselLink.

## Create Invoice in CounselLink

You can add an invoice directly to CounselLink if you are not able to create and submit an invoice using any of the other methods.

1. Log into <https://www-p2.counselink.net>
2. Locate the matter and view the Matter Overview page.
3. Select the **Invoices** tab.



4. Click **Create**. The Create Invoice page displays.
5. Complete the form. Required fields are indicated by an asterisk.

The 'Create Invoice' form includes the following sections:

- Invoice Information:** Corporate Customer Matter ID: M71489255, Invoice Currency: US Dollar, Law Firm Matter ID: 4427654, Law Firm Invoice ID: \* 63654780, Invoice Date: \* 09/27/2017 (mm/dd/yyyy), Final Invoice: [dropdown], Invoice Description: [text area].
- Additional Information:** [empty section]
- Discount/Premium Information:** Add, Delete buttons, and a table with columns: Description, Type, Apply To, Percentage, Amount (USD), Total (USD).

Buttons: Save, Cancel, \* Indicates Required Fields.

6. Click **Save**. The Invoice Overview page opens and displays a message to add charges to the invoice.

The 'Invoice Overview' page displays the following information:

- Message: "There are no charges in this invoice. Please add fees and/or expenses." (highlighted with a red box)
- Invoice: 63654780 (LFI: 63654780) [Edit]
- Invoice Details: Willow & Associates, Raleigh; Fees: 5238 - Detailed Hourly Fee Arrangement; Submit Date: 09/27/2017; By: N/A; Invoice Type: Non-VAT; Invoice Currency: US Dollar.
- Invoice Status: Incomplete; Reviewer: [empty]; Prompt Pay: [empty]; Expires in: [empty]; Final Invoice: No.
- Matter: Able vs. State of NC; M71489255 (4427654); Matter Contact: Robert Brown; Invoice Contact: Robert Brown; Budget Period: 01/01/2017 - 12/31/...
- Amount Summary: Approved to Date: \$0.00 USD; Billed Amount: \$0.00 USD; Adjustments: \$0.00 USD; Discounts/Premiums: \$0.00 USD; Taxes: \$0.00 USD; Net to pay: \$0.00 USD.
- Charges: [Add Fee] [Add Expense] [More] [Group: None] [Filter: None]

Charges table: No charges found.

7. Click the **Charges** tab and select one of the options:
  - a. **Add Fee** to add charges for the services provided by the timekeepers.
  - b. **Add Expense** to add charges for the expenses incurred by the timekeepers.
8. Enter the charge level details, including the Charge Date, Timekeeper Initials, Task Code, Activity Code, Charge Description, Units, Rate, Adjustments, Tax, and Net Amount.
9. Click **Save**. The Invoice Overview page displays a message that the invoice must be activated.
10. Click **Activate**.
11. Click **OK**. The invoice begins processing.

### **Email or Mail Invoice**

**Travelers invoices can NOT be submitted via email or mail.**

If your firm needs help to prepare to submit invoices through the Counsellink application, our Customer Support department is available 24 hours a day, 7 days a week to assist you

## **Stages of Invoice Review**

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Counsellink uses a combination of automated reviews and client reviews to identify and flag issues on invoices.

1. **Validation Review** – All submitted invoices are immediately checked for math and date format errors. If any are detected, error messages display. Resolve the math or date errors and submit the invoice again.
2. **Billing Guideline Review** – Charge lines are compared to your client’s billing rules. Any violations are noted and either a flag or an adjustment is applied to the charge. Review your client’s billing guidelines to prevent flags and adjustments on future invoices.
3. **Client Review** - The client reviews all the charge lines, including adjustments and flags added during the Billing Guideline review, and makes charge-level and invoice-level decisions. Once complete, the invoice is approved or rejected by the client. If approved, invoice payments are made.

**Note:** Some clients allow law firms to review and appeal adjustments on invoices. Other clients reject invoices with charge errors and require submission of a new, corrected invoice. Review your client’s policies to resolve rejected invoices appropriately.

## **Invoice Statuses**

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The Billing panel of the Home page shows the number of invoices in the following statuses:

- **Action Required for Collaborative Review** - Invoices that were adjusted by the client while using the collaborative review feature. Action is required by the law firm before these invoices can be finalized.
- **Inactive / Incomplete** - Invoices that have been started by the law firm, but have not been sent to the client.
- **On Hold** - Invoices ready to be sent to client, but the invoice cannot be sent because of a pending matter status. Resolve the matter status issue, then submit the invoice.
- **Scheduled** - Some clients require that invoices be sent only during certain time periods. Invoices created prior to a pre-set billing day will be held in this status.
- **Rejected by Billing Guidelines Review** - Invoices sent to the clients and automatically rejected by the corporate client's billing guidelines. Review the billing guidelines before submitting another invoice.
- **Rejected by Client** - Invoices rejected by the client after passing the billing guidelines review. View the invoice or charge-level notes to determine why the invoice was rejected.
- **Adjusted and Approved by Client** - Invoices approved by the client within the last sixty (60) days after adjustments were made. Review the invoice for details about adjustments made.

Billing		Q Search ▾	
Invoices		Accruals	
Action Required for Collaborative Review	0	Submitted	0
Inactive / Incomplete	10	Requested	1
On Hold	0		
Scheduled	0		
Rejected by Billing Guidelines Review	9		
Rejected by Client	1		
Adjusted and Approved by Client	1		

[+ Import Invoice](#)

## Adjusting Fees and Rates

Law firms can change an approved fee offer to modify their rates and discounts for law firm-controlled fee offers, such as at the beginning of the year. When the law firm creates a new offer, the rates in the original offer will remain in effect until the new offer has been approved by the client.

### Search for a Fee Offer

Locate the fee offers made when work was initially assigned from CounselLink.

1. Click the **Fees** tab.
2. On the Fee Search page, confirm **Fee Offer** is selected as the **View** option in the top-right corner. If not, click that option.
3. Select filters to reduce the number of fee offers shown in the results list until you identify the fee offer to update.

## Update a Fee Offer

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Submit revised fees and rates for an offer as needed.

1. At the top of the **CounselLink Home Page**, click the **Fees** tab to display the **Fees Search** Page. The Fees Search screen displays.
2. At the top of the screen (right-hand corner) for the category, select **Fee Offers** to view the perspective list.
3. Under the **Fee Offer Id** column, click on the identifier of the Fee Offer to be viewed. The Fee Offer Overview page displays
4. At the top right-hand corner of the screen, click the **Copy Fee Offer** (plus sign) button. The Copy Fee Offer screen displays
5. Complete all fields as applicable (i.e., change / update the **Effective Date**, **Currency**, and / or enter a reason for the Fee Offer.
6. If the **Stage Structure**, **Timekeepers** / other sections are collapsed, click the **Expand** button to expand the section.
7. In the **Stage Structure** section, enter / update values as applicable.
8. Optional Step: In the **Timekeepers** section, click **Download Timekeeper Rates Template** if applicable.
9. Click **Open / Save** to complete the **Timekeeper Rates Template** download.
10. Optional Step: In the **Timekeepers** section, click **Upload Timekeeper Rates** if applicable.
11. Choose a file to upload, and proceed.
12. Complete all other aspects of the **Timekeepers** section as applicable, and then click **Save**.
13. An Approval Confirmation screen displays.
14. Click **Yes** to confirm and continue. The Fee Offer Overview screen displays the Fee Offer to include the update reason for the Fee Offer.

## View the Status of Fee Offers

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The Fees & Discounts panel of the Home page shows the number of fee offers in the following statuses:

- **Pending Client Approval** – The client has been notified of these offers via email, but still needs to review then accept or decline them.
- **Partially Approved Offers** – Indicates that some fees and rates on these offers were accepted while others were rejected. Invoicing for the approved portion can begin, but the rejected portion of the offers are pending resolution.
- **Rejected Offers (up to 30 days)** – The client has reviewed and rejected these offers in the last 30 days. View the offers to see the reasons they were rejected by the client.

## Resolve Rejected or Partially Approved Fee Offers

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If the client rejects or partially approves a fee offer, the law firm is notified of the reason by email.

1. In the Fees & Discounts panel of the Home page, click the link for the fee offer status.
2. If more than one offer is pending, click the **Fee Offer ID** link in the search results. If only one offer is pending for that status, the Fee Offer ID page opens immediately.
3. Review the message at the top of the page, then modify the offer as needed.
4. Click **Save** to complete the update.
5. Click **OK**. A notification is sent to the client requesting review and approval.

# Search to Find the Records You Need

## Search Methods

CounselLink provides various search methods to help you locate the records you need.

1. Home page links
2. Quick Search bar
3. Search pages

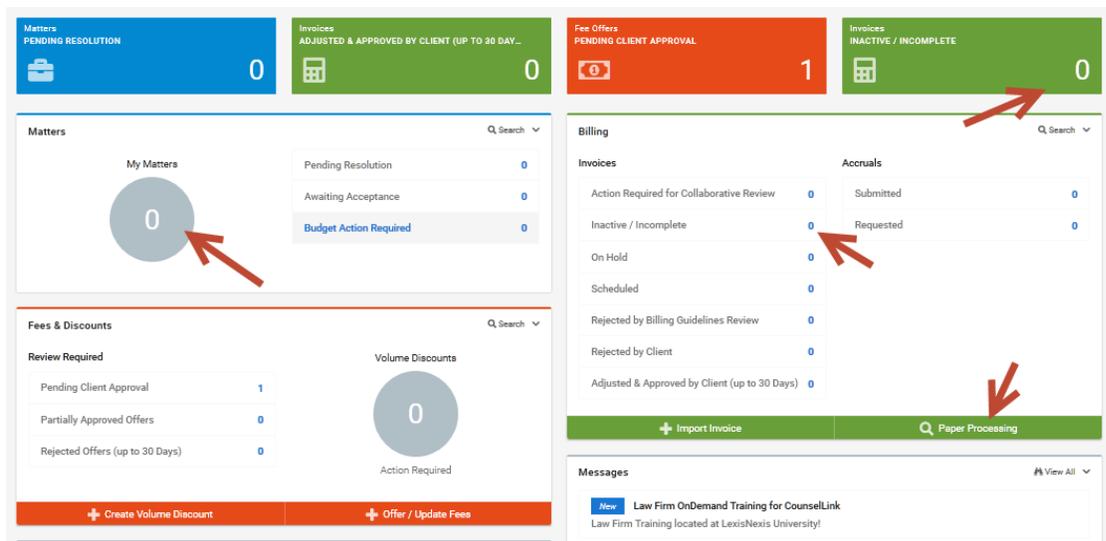
### Home Page Links

The CounselLink home page contains links to preconfigured searches. You can access these links by clicking the colored info-tiles at the top of the page or the labeled links grouped in panels by type.

1. Confirm the correct client is selected from the drop-down list in the top left corner.



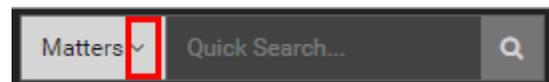
2. Click any labeled search link. The search results page displays.
3. Select a record in the results list to continue.



### Quick Search Bar

Use the Quick Search bar at the top of the CounselLink page to perform a search across all standard and custom fields.

1. Confirm the correct client is selected from the drop-down list in the top left corner.
2. Choose to search on **Matters**, **Invoices** or **Documents**.
3. Enter a keyword in the **Quick Search** area.
4. Click the **Search** icon.



### Search Pages

Search for records by type.

1. Confirm the correct client is selected from the drop-down list in the top left corner.
2. Click a labeled tab.

- All relevant results automatically display.
- Use the filters to narrow the search results to specific records.

## Working with Search Results

### Navigate the Search Page

Get familiar with the panels and options on the search page.

- Keyword Search
- Active Search Filters & Reset button
- Search Tips
- Save Search button
- Filter Panel
- Search Results List navigation buttons
- Mass Action Buttons
- Print/Export Options
- Search Result Configuration
- Search Results List

The screenshot shows a search results interface with the following elements highlighted by numbered red boxes:

- 1**: Search Matters... input field
- 2**: Matter Status: Active filter and Reset to Default button
- 3**: Search Tips button
- 4**: Save Search button
- 5**: Filter Your Results panel (Search Within, My Matters, Matter Contact)
- 6**: Show 25 dropdown and pagination buttons (First, Previous, 1, 2, Next, Last)
- 7**: Close button for mass actions
- 8**: Print and Export buttons
- 9**: Columns configuration button
- 10**: A search result row (Brown vs Rogers)

Matter Number	Matter Title	Matter Contact	Matter Type
M72671651	Hatchett Claim 01255154	Gomez, Lena	Litigation
M72666836	Smith vs Rogers	Brown, Robert S	Litigation
M72593071	Brown vs Rogers	Brown, Robert S	Litigation
M72447687	Techland Merger	Brown, Robert S	Litigation
M72447369	Green vs. Rogers	Brown, Robert S	Litigation

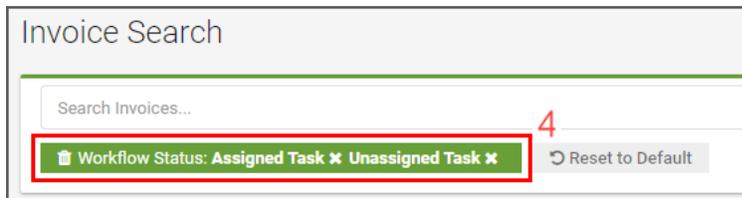
### Keyword Search Tips

When using the Keyword Search bar to narrow your search results, multiple terms you enter are “AND’ed” together by default, meaning all terms must be found in a record for it to display in your results. The **Search Tips** button displays a list of parameters that you can use to refine your keyword search in other ways:

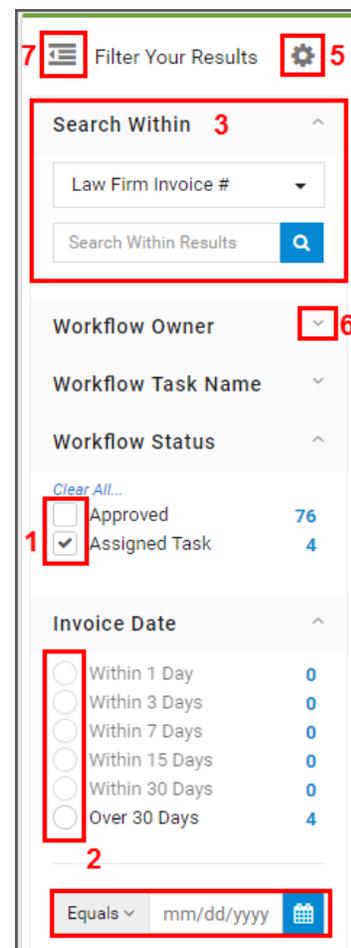
- Wildcard:** Type in a word or partial word and enter \* at the end for results that have terms that begin the same.
- Exact Match:** Use double quotes around two or more keywords to return an exact match.
- Exclude:** Use NOT (caps required) to exclude a term.
- Match Any:** Use OR (caps required) to find one term.
- Sub Strings:** Find part of an entire term by entering that portion directly in the search box.

## Use the Filter Panel

When you access any search page, the default filters applied are listed below the Search bar. Use the **Filter Your Results** panel to refine the search results. Filters are available for most standard and custom fields.



1. Select filters by placing a check mark next to any filter attribute. The search results automatically refresh.
2. For date filters, select a date range option. Or select a date comparison calculator from the drop-down list then enter the date.
3. Use the **Search Within** option to narrow search results by a keyword found in a specific field.
  - a. Click the arrow to select a field to search within.
  - b. Enter a keyword.
  - c. Click the **Search** icon.
4. Clear any filter shown below the Search bar by clicking the **X** beside it. Or click the **Reset to Default** button.
5. Click the **Configure Filters** icon to select which filters display in the panel.
6. Click the arrow to the right of any filter to collapse the section if desired.
7. Click the icon to hide the Filter Your Results panel when not in use.



## Configure Search Results

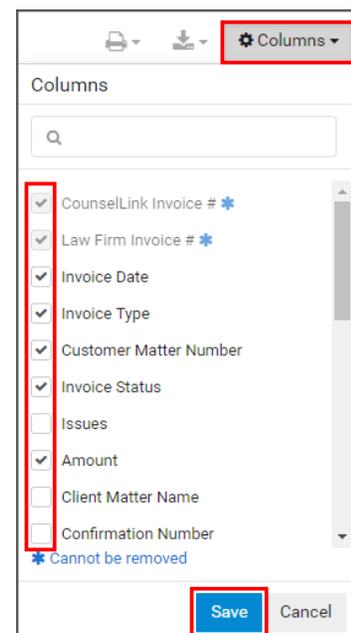
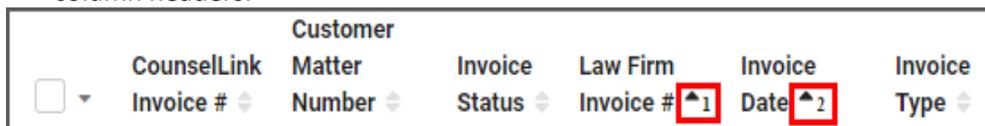
You can customize which columns display in the Search Results list and in what order. Customize the view to show the details you need.

1. Click the **Columns** icon.
2. Click the check boxes to select the fields to display. Remove check boxes beside the fields you do not want to show. Scroll down to view additional options.
3. Click **Save**. The selected columns display to the right on the list.
4. Left-click a column header and drag it into the desired order. Repeat as needed to rearrange the column order.

## Sort Search Results

Sort search results by any visible column.

1. Click any column header to sort ascending.
2. Click a second time to change to a descending sort order.
3. To sort by more than one column, hold down the **Shift** key while clicking multiple column headers.



### Complete Actions from the Search Results

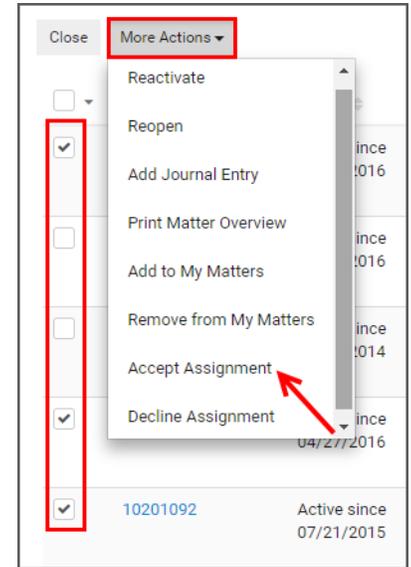
Many actions can be completed directly from the search results list. You can modify multiple records at once using available actions.

1. Select one or more items from the search results list with a check mark.
2. Perform an action on selected items.
  - a. Click an action button.
  - b. Select an option from the **More Actions** drop-down list.

### Print or Export Search Results

Print ad hoc reports or export data for sharing and analysis.

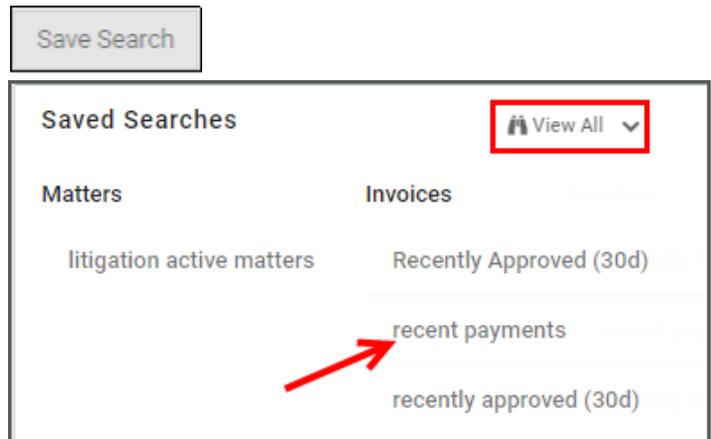
1. Select one or more items from the search results list with a check mark.
2. Click the **Print** icon to print the selected items.
3. Click the **Export** icon to create a spreadsheet of the selected items.



### Save a Search

You can save a configured search to reuse it again.

1. Configure a search using the filter options.
2. Click the **Save Search** button.
3. Enter a name for your search.
4. Click **Save**.
5. Saved Searches are available from the drop-down list at the top of the Search page or from the **Saved Searches** panel on the Home page.
6. Click any saved search name to run it again.
7. Manage your saved searches by clicking **View All** on the Home page.



## Support Resources

Training and support resources are available to assist you with Counsellink when needed.

### Training

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LexisNexis provides free [OnDemand video training](#) that is available 24X7. The self-navigational module covers a range of topics including:

- Configuration
- Rate submission
- Matter management
- Successful invoicing

We also provide a virtual, instructor-led course: [Working Efficiently in Counsellink](#). The 1 hour workshop is free to all participants. Topics include:

- Search features and shortcuts
- Updating fees and rates
- Understanding invoice review and statuses
- Microsoft Outlook integration
- General troubleshooting

### Attorney Implementation Support

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Direct any questions regarding the initial law firm registration process to the Attorney Implementation specialists.

 Attorney Implementation support is available Monday– Friday, 9:00 am to 7:00 pm, Eastern Time (US)

 Email support request to: [attorneyimplementation@lexisnexis.com](mailto:attorneyimplementation@lexisnexis.com)

### Customer Support

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Counsellink has a Customer Support team that is available to both corporate clients and law firms. Trained phone representatives are available to answer your questions concerning logins and passwords, fee offers and rates, matters, invoices, and more.

You can leave a phone message or send an email to the support team at any time. Calls are returned throughout the day.

#### **Phone Support**

 24x7 Free Customer Support

 United States: 1-800-600-2282

 International: +1 919.378.2713

## ***Email Support***



General Support: [ask@lexisnexis.com](mailto:ask@lexisnexis.com)



Test Invoices: [InvoiceTest@lexisnexis.com](mailto:InvoiceTest@lexisnexis.com)

If an invoice has been returned due to an error and you need further explanation, you can send the invoice file to the above email address as an attachment. The support team can test your invoice and help you understand the error notifications.

**WELCOME TO COUNSELLINK!**