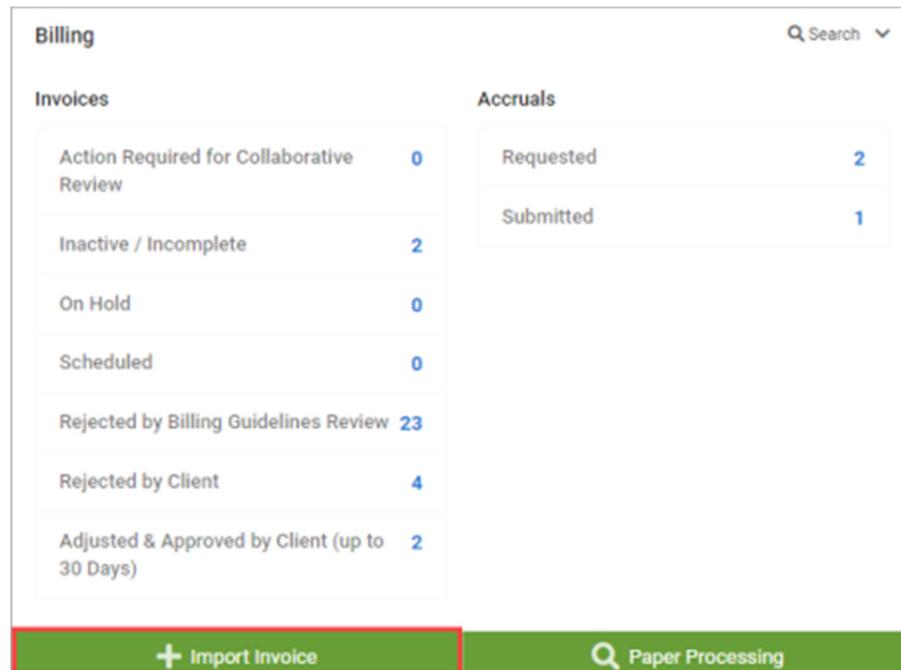


There are two methods to submit your invoices to CounselLink:

A. If your software can export in LEDES format, you can upload the invoice to the file in CounselLink as follows:

1. Navigate to the Invoice Import page by one of the following ways:
  - Click the **+Invoice Import** button on the Billing Panel.



The screenshot shows the 'Billing' section of the CounselLink interface. It features a search bar at the top right. Below the title, there are two columns: 'Invoices' and 'Accruals'. The 'Invoices' column lists various statuses with their respective counts: Action Required for Collaborative Review (0), Inactive / Incomplete (2), On Hold (0), Scheduled (0), Rejected by Billing Guidelines Review (23), Rejected by Client (4), and Adjusted & Approved by Client (up to 30 Days) (2). The 'Accruals' column lists Requested (2) and Submitted (1). At the bottom, there are two buttons: '+ Import Invoice' (highlighted with a red box) and 'Paper Processing'.

Billing		Search	
Invoices		Accruals	
Action Required for Collaborative Review	0	Requested	2
Inactive / Incomplete	2	Submitted	1
On Hold	0		
Scheduled	0		
Rejected by Billing Guidelines Review	23		
Rejected by Client	4		
Adjusted & Approved by Client (up to 30 Days)	2		

- Click the **Invoice Import** button at the top of the Invoices Search page.

Show Currency in:  USD  As Submitted **Import Invoice** Saved Views [Save View](#)

[Search](#) Search Tips

default

Show 25 ▾ First Previous **1** 2 3 4 5 Next Last

Remove Invoice Flag [Columns ▾](#)

Law Firm Invoice #	Invoice Date	Issues	Invoice Billed Amount	Invoice Net Amount	Invoice Status	Payment	Rejected By	Payment Total
390093	21.02.2017	0	\$25.00	\$25.00	Client			\$0.00

- Click the **Import** button on the Invoices tab of the Matter Overview page.

All Financials Law Firms **1** Participants Journal **Invoices 1** Documents

[+ Create](#) **Import**

<input type="checkbox"/>	Invoice...	Law Fir...	Invoice...	Law Office	Status
<input type="checkbox"/>	63625647	63625647	Non-VAT	Willow & Associates, Raleigh	Invoice Review Step 1

0 of 1 items selected

Approved
  Note
  New Review Cycle
  Threshold Warning
  Threshold Exceeded

The Import Invoices page displays.

### Import Invoices

- Select Files
- Review Invoice Status
- Review Tax and Currency
- Add Attachments

**Step 1: Select Files**

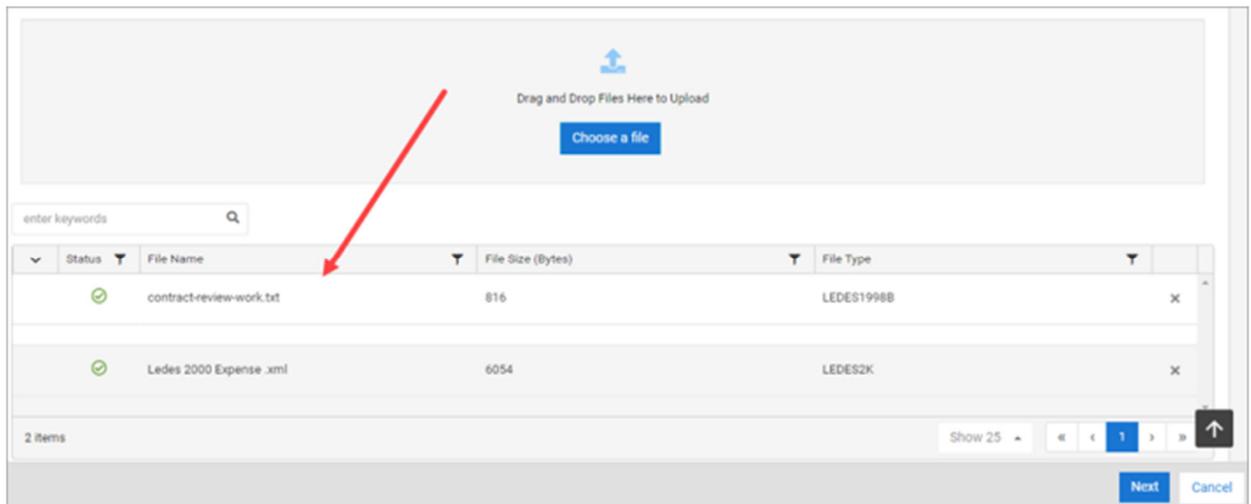
You can import invoice files up to a total of 10MB  
CounselLink accepts: LEDES 1998B and 1998BI only

Drag and Drop Files Here to Upload

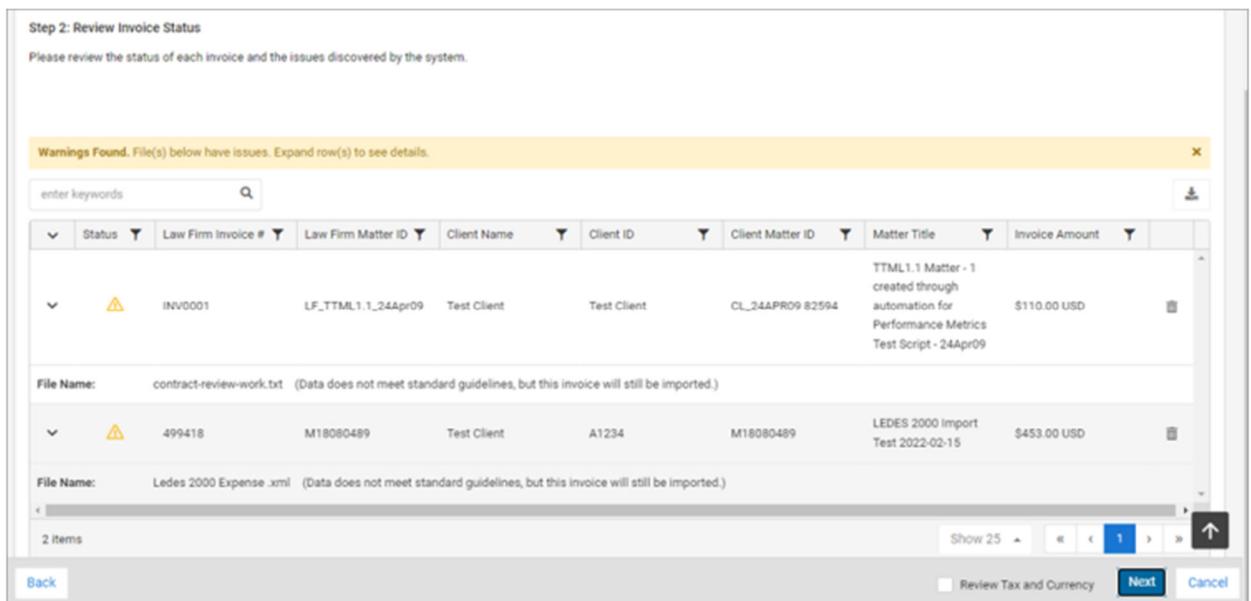
[Choose a file](#)

2. **Choose a File** to upload from your computer, or drag and drop the LEDES file from your desktop.

View the files you've uploaded, including their status, under the drag and drop section.



3. Click **Next** once you have uploaded all files. The progress bar moves to Step 2, displaying any validation errors or warnings.



4. Click the down arrow next to the file to expand any validation error notes. Each invoice will display one of three symbols:

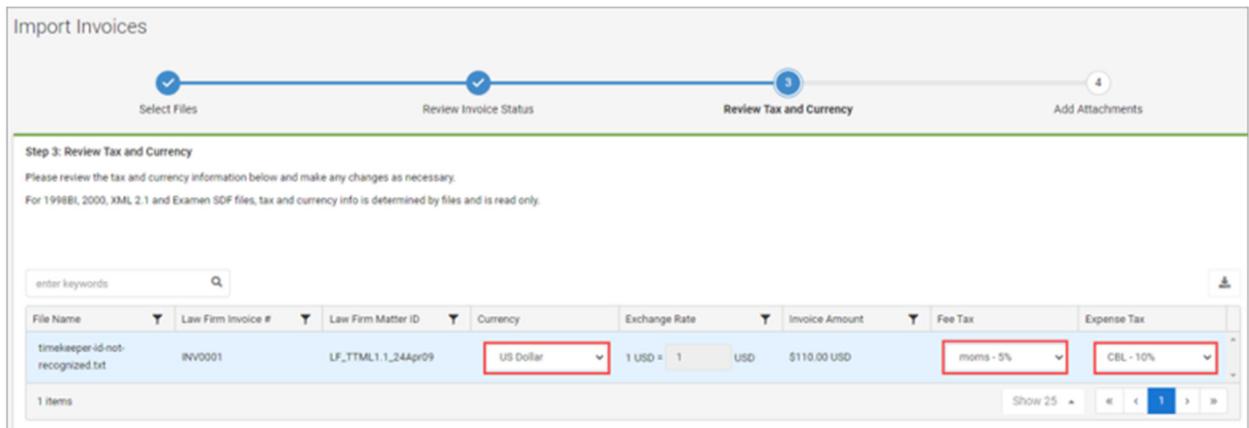
- **Green check mark**  : The invoice was validated.

- **Yellow exclamation point** : The invoice will be accepted but certain items were altered to validate properly.
- **Red exclamation point** : The invoice can not be validated in its current state. You can continue to the next step with any validated invoices, or you can resubmit this invoice to correct the errors detailed here. Click the **Back** button to resubmit or the trash can icon in the invoice row to remove it from the upload.

5. Before advancing, you have two options:

- Click **Next**. This takes you directly to the final step in the upload process. Skip to Step 8 in this topic.
- Check the box next to Review Tax and Currency and click **Next**. The Review Tax and Currency step displays.

6. Select the Currency and Tax information from the drop down options as needed.



Import Invoices

Step 3: Review Tax and Currency

Please review the tax and currency information below and make any changes as necessary.  
For 1998BI, 2000, XML 2.1 and Examen SDF files, tax and currency info is determined by files and is read only.

enter keywords

File Name	Law Firm Invoice #	Law Firm Matter ID	Currency	Exchange Rate	Invoice Amount	Fee Tax	Expense Tax
timekeeper-id-not-recognized.txt	INV0001	LF_TTML1.1_24Apr09	US Dollar	1 USD = 1 USD	\$110.00 USD	moms - 5%	CBL - 10%

1 items

Show 25

7. Click **Next**. The Final Review and Add Attachments step displays.

Import Invoices

Select Files     
 Review Invoice Status     
 Review Tax and Currency     
 Add Attachments

**Step 4: Final Review and Add Attachments**  
Attach documents, add notes, turn on FastTrack, or mark as Final Invoice for each item.

enter keywords

<input checked="" type="checkbox"/>	^	Law Firm Invo...	Law Firm Matt...	Client	Client Matter ID	Matter Title	Invoice Type	Related Invoice	Invoice Amount	Added
<input checked="" type="checkbox"/>	^	INV0001	LF_TTML1.1_24Ap...	Test Client	CL_24APR09 82594	TTML1.1 Matter - 1 created through automation for Performance Metrics Test Script - 24Apr09	Non-VAT		\$110.00 USD	

1 of 1 items selected

8. If needed, select the invoice(s) and choose one of the following:
  - **Add Attachment:** Click to add an attachment or attachments to your invoice.
    - a. **Choose a File** or drag and drop from your desktop to the Add Attachments window. You can also enter a URL to an external file.
    - b. Enter a **Document Name**.
    - c. Click **Upload Document(s)**.
  - **Final Invoice:** Click if the invoice(s) selected will be your final invoice.
9. Click **Send to CATIC**.

The invoice is sent to CATIC for review.

B. II. If your software does not export in LEDES format, you can email your invoice in PDF form to [counselinkinvoices@lexisnexis.com](mailto:counselinkinvoices@lexisnexis.com). *The invoice should not contain underlines or bold characters.* It takes up to two weeks for the invoices to be uploaded into CounselLink. There is no charge for this service.