



## Prep for Importing - Adding a Law Firm Matter ID

Before you import your invoice, you must enter the Law Firm Matter ID. The ID is assigned to the matter by your time and billing software.

As an alternative to this process, you may want to try the steps in [Set Corporate Customer Identification](#) process. This process only has to be done once, and it is completed.

1. Find the Matter Overview page for which you wish to add the Law Firm Matter ID.
2. Click on the **Edit** button to access the **Matter Edit** screen.
3. In the **Matter ID** field, type in the applicable **Law Firm Matter ID**. This is the number your invoicing system puts into the fourth field of a LEDES98B file.

The limit on this ID is 64 characters.

A screenshot of a web form titled "Edit Matter" with a close button (X) in the top right corner. The form contains two main input fields: "Law Firm Matter ID" and "Lead Attorney". The "Law Firm Matter ID" field is a text box with the placeholder text "Law Firm Matter ID" and is highlighted with a red rectangular border. The "Lead Attorney" field is a dropdown menu with the placeholder text "Select One" and a downward arrow icon. At the bottom right of the form, there are two buttons: a blue "Save" button and a grey "Cancel" button.

4. Click the **Save** button to complete the process.

## Importing an Invoice into CounselLink

[Importing an Invoice – CounselLink Law Firm \(zendesk.com\)](#)

CounselLink accepts invoices created by third party time and billing software.

CounselLink [performs a validation process](#) during the upload. Once the invoice is uploaded, you can add tax, choose currency, and attach documents.

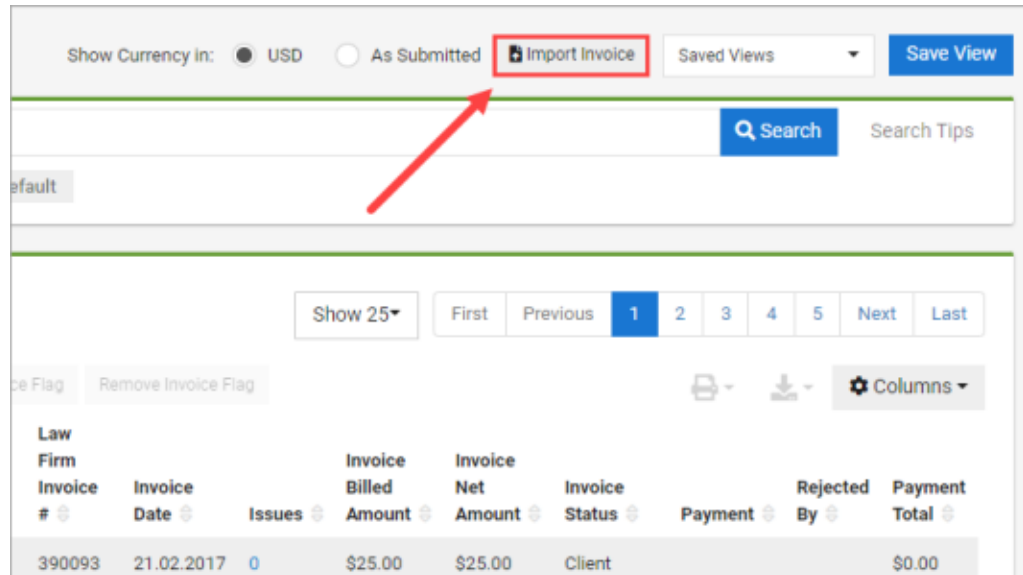
Be sure to review the [accepted file formats](#) before import. Additionally, you should have set the [Adding a Law Firm Matter ID to Invoices](#) or [Set Corporate Customer Identification](#) and set your own [Set Preferred Currency for Firm/Office](#).

This import feature does not accept 2.1 LEDES formats. If you upload a 2.1 file, you will receive an error and be prompted to step through the process using our class import feature.

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

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		
+ Import Invoice		Paper Processing	

- 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](#)

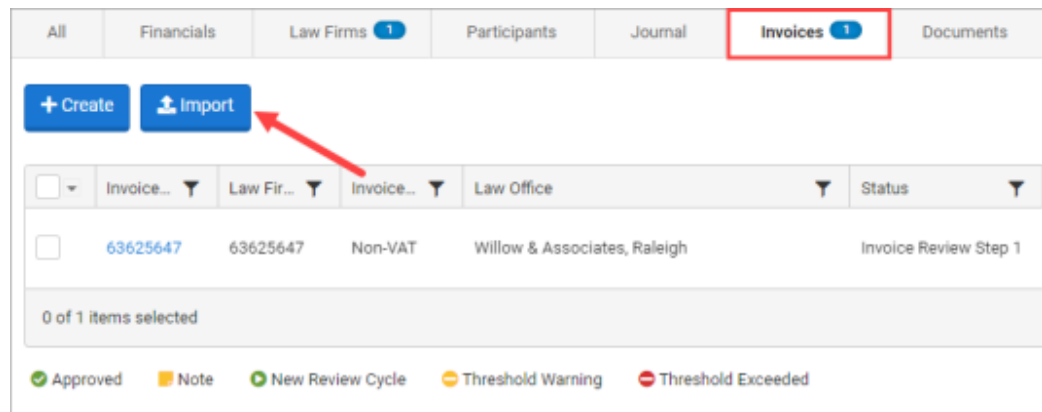
[Search](#) Search Tips

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

Remove Invoice Flag

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

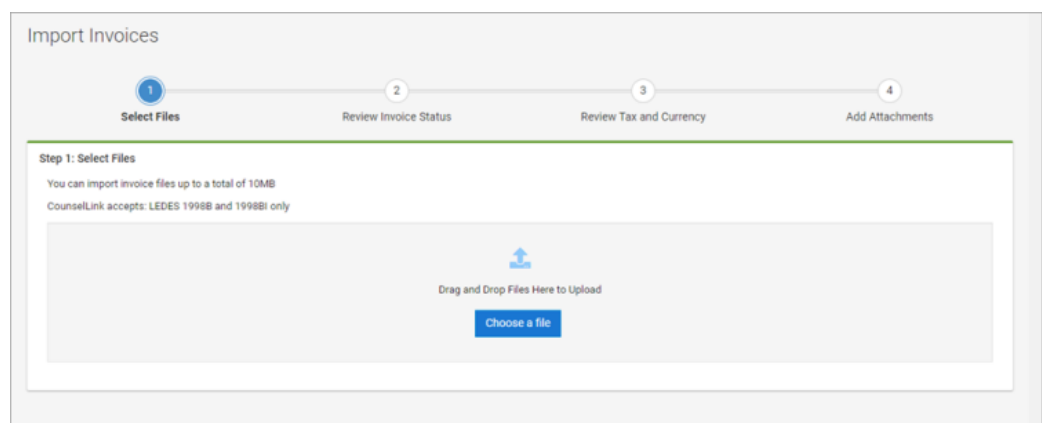
[+ Create](#) **Import**

	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

1 Select Files 2 Review Invoice Status 3 Review Tax and Currency 4 Add Attachments

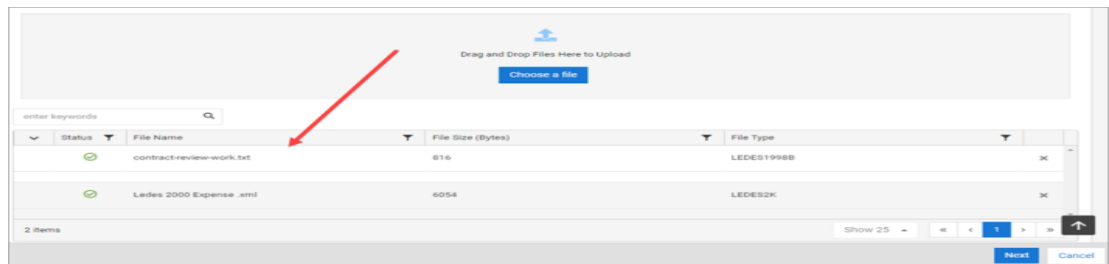
Step 1: Select Files  
 You can import invoice files up to a total of 10MB  
 CounselLink accepts: LEDES 1998B and 1998Bii only

Drag and Drop Files Here to Upload  
[Choose a file](#)

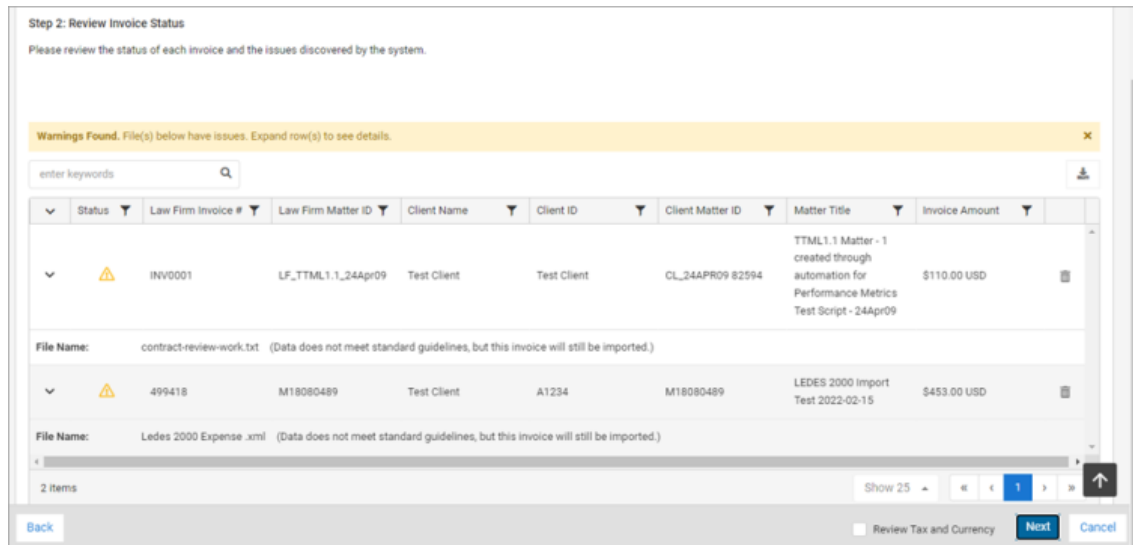
2. **Choose a File** to upload from your computer, or drag and drop the LEDES file from your desktop.




You can drag and drop multiple files at the same time. Select all invoices at once, and drag them onto the page.

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.

You can group invoices by status by clicking the filter icon (  ) in the Status column. You can also use the search field to find a particular invoice in the list.

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.

This step is used primarily for 1998B files, where you can manually select your currency and tax selections for each invoice. If you forget to select Review Tax and Currency, you can click the **Back** button to return to Step 2.

6. Select the [Currency and Tax information](#) from the drop down options as needed.

If there are no expenses on the invoice, the Expense Tax field will be read only.

Import Invoices

Progress: 1. Select Files (✓) 2. Review Invoice Status (✓) 3. Review Tax and Currency (3) 4. Add Attachments (4)

**Step 3: Review Tax and Currency**

Please review the tax and currency information below and make any changes as necessary.  
For 1998B, 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%	CEL - 10%

1 items

Show 25

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

Import Invoices

Step 4: Final Review and Add Attachments

Attach documents, add notes, turn on FastTrack, or mark as Final Invoice for each item.

**Add Attachment** **FastTrack** **Final Invoice**

enter keywords

✓	Law Firm Invo...	Law Firm Matt...	Client	Client Matter ID	Matter Title	Invoice Type	Related Invoice	Invoice Amount	Added
✓	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

Back Send to Client(s) Save for later Cancel

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.

You must have the Document Administrator role to add attachments. If your invoice file contains invoices for multiple clients, you will be unable to add attachments.

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)**.

- **FastTrack:** Click to use FastTrack for your invoice(s). This option shows if it is enabled for your client and your firm is enrolled.
- **Final Invoice:** Click if the invoice(s) selected will be your final invoice.

9. Click **Send to Client(s)**.

Click **Save for Later** if you wish to delay sending to the client. The invoice will be put into a pending state.

## Create an Invoice within CounselLink

There may be times when you need to create an invoice directly within CounselLink.

<https://cllf.zendesk.com/hc/en-us/articles/26679622978451-Creating-an-Invoice-within-CounselLink>

See [this video](#) for a demonstration on creating an invoice in CounselLink.

1. Click the **Invoices** tab from the Matter Overview page.
2. Click **+Create**. The Create Invoice page displays

Create Invoice

**Invoice Details**

Law Firm Invoice ID \*  
☒ Auto ☐ Enter Invoice ID

Invoice Date \*  
12.05.2020

Corporate Customer Matter ID  
M18050876

Law Firm Office \*  
CounselLink Test Private, Sacramento

Invoice Currency \*  
US Dollar

Invoice Type \*  
VAT

Related Invoice  
No Invoices Found

Law Firm Matter ID  
N/A

Final Invoice  
☐ Yes ☐ No

Invoice Description  
Enter description here  
15360 Characters Remaining

Additional Information

3. Provide the required information in the **Invoice Details** section.

Fields marked with an asterisk (\*) indicate required entry.

- The **Law Firm Invoice ID** will fill in automatically if you select **Auto**. Select **Enter Invoice ID** to enter a new ID manually. This ID can be used to track the invoice status once it is created.
- Click the **calendar icon** in the Invoice Date box to select the date when the invoice is to be sent to the client. The current date displays by default.
- The default law firm office is displayed under **Law Firm Office**. You are required to select an office from the list when multiple law firms are assigned to a matter.
- Select the currency to be used for the billing transaction in the **Invoice Currency** list. US Dollar is selected by default.
- Click one of the **Final Invoice** options:
  - **Yes**, if this is the last invoice being submitted for the matter.

- **No**, if there might be more invoices being submitted for the matter.
  - Type a short explanation of the invoice or other pertinent notes in the **Invoice Description** box. You can enter a maximum of 15360 characters.
4. In the **Additional Information** section, complete each section as appropriate, where fields marked with an asterisk (\*) indicate required entry.
  5. If applicable, [add a discount or premium](#) to the invoice.
  6. Click **Save**. The Invoice Overview page displays.
  7. Expand the sections in the Additional Information area as needed. You may be required to fill in some client-configured fields before activation.
  8. When manually creating an invoice, complete the following:

#### **Add Fees and / or Expenses**

- Click the **Charges** tab.
- Perform one / all of the following:

Click **Add Fee** to add a fee / fees.

- In the **Edit Fee Charges** screen, complete / add entries as required.
- Click **Save**.

Click **Add Expense** to add an expense / expenses.

- In the **Edit Expense Charges** screen, complete / add entries as required.
- Click **Save**.

The Invoice Overview screen displays, indicating any issues that may remain, highlighted in yellow. Review for any errors and correct as necessary.



Invoice: 495040 (LFI: 495040) Remove Prompt Pay Discount

Invoice Details  
 CounselLink Test Private, Sacramento  
 Fees: 3293 - Detail Fee Structure - RL

Invoice Status  
 Client Review Level 1  
 Reviewer

Matter  
 Matter Closed - matter and Invoice contact active - (12)  
 M17970188

Amount Summary  
 Approved to Date \$0.00  
 Billed Amount \$0.00  
 Adjustments \$0.00  
 Discounts/Premiums \$0.00  
 Taxes \$0.00  
 Net to pay \$0.00

Related Invoices  
 Discount/Premium Information  
 Tax Summary  
 Additional Information

Charges

9. Optional: Add supporting documents to a charge line if necessary.

- Place a check mark next to one or more charges.
- Click **More Actions**.
- Select **Add Charge Attachment**.

Charges

Subtotal: 1 charges selected

Delete Charge Add Fee Add Expense More Actions Display Options

All Fields Contains Search Ch

Group By:

	Date	Time	Code	Description
<input checked="" type="checkbox"/>	02/07/2023	None	None	Rate per hour
<input type="checkbox"/>	03/16/2022	None	None	Travel

The Add Attachments window displays.

**Add Attachments** [X]

**Upload Document(s)**

Use one of the methods below to upload your document(s). Documents can be up to 100mb in size.

**External Link** Link to an external resource...

Enter the full link including the http:// or https://

Drag and Drop Files Here to Upload

**Choose a file**

**Document Details** \* Required Fields

Name \* Document Name

**Upload Document(s)** Cancel

- Upload your document(s) by one of the following methods:
  - **Enter** the link (URL) to the document(s) to be uploaded under the Upload Documents section.

Enter the full link including the http:// or https://

- **Drag and drop** a file into the Drag and Drop section.
- Click **Choose a file** In the Drag and Drop section to access the document directory / location.

#### 10. Activate the invoice.

Click the **Activate** button to activate the invoice.

Click **Yes, Activate** on the Activate Invoice screen.

If you have any billing questions or need assistance, please contact our Customer Support team, available 24/7 at [ask@lexisnexis.com](mailto:ask@lexisnexis.com), or call +1-919-378-2713 or 1-800-600-2282.