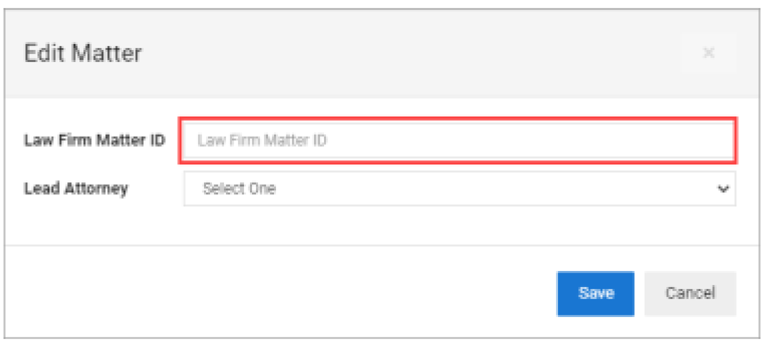
Prep for Importing - Adding a Law Firm Matter ID

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.



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

Importing an Invoice into CounselLink

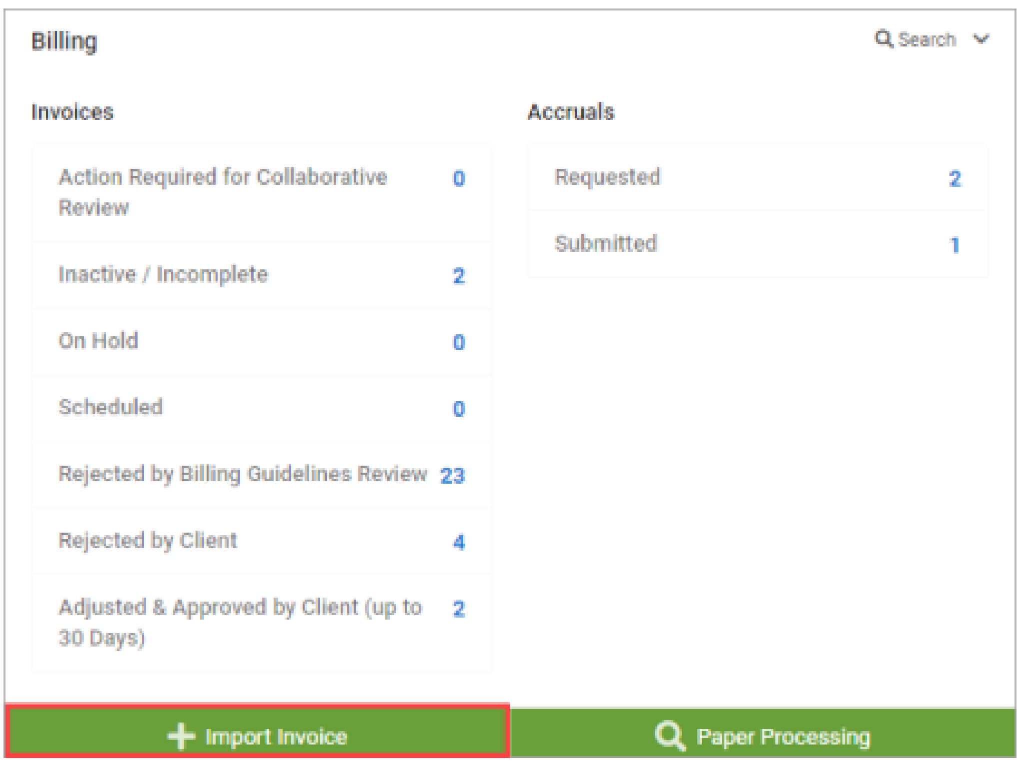
[Importing an Invoice – CounselLink Law Firm (zendesk.com)]

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.

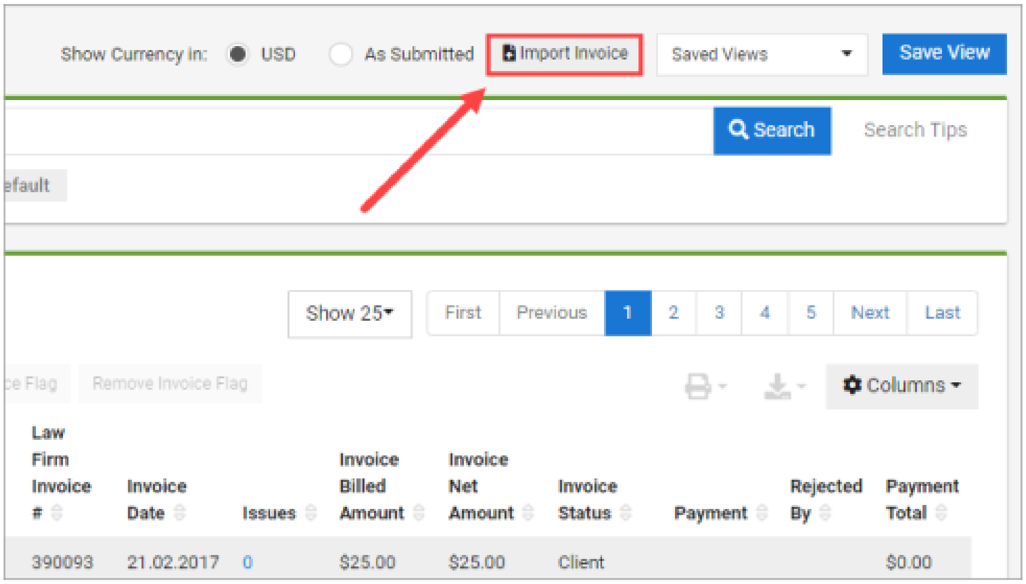
Be sure to review the accepted file formats before import. Additionally, you should have set the Adding a Law Firm Matter ID to Invoices or Set Corporate Customer Identification and set your own Set Preferred Currency for Firm/Office.

> 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.

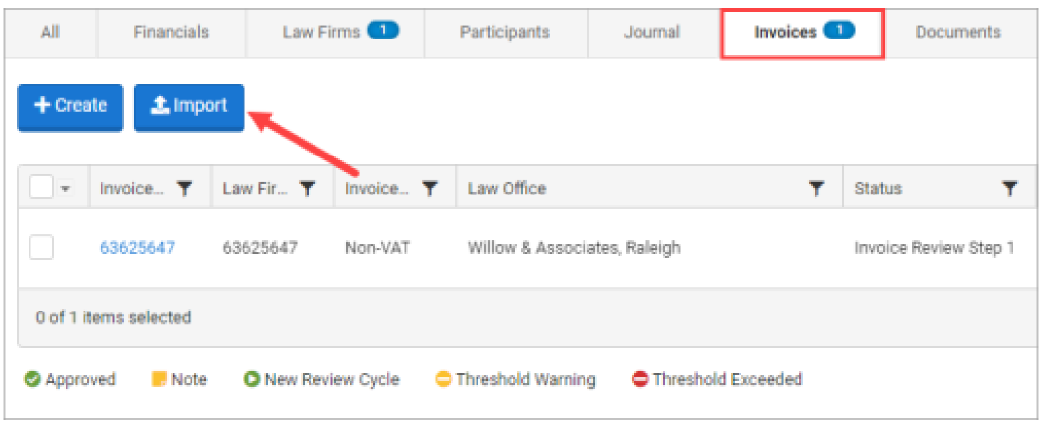
1. Navigate to the Invoice Import page by one of the following ways:
   - Click the **+Invoice Import** button on the Billing Panel.



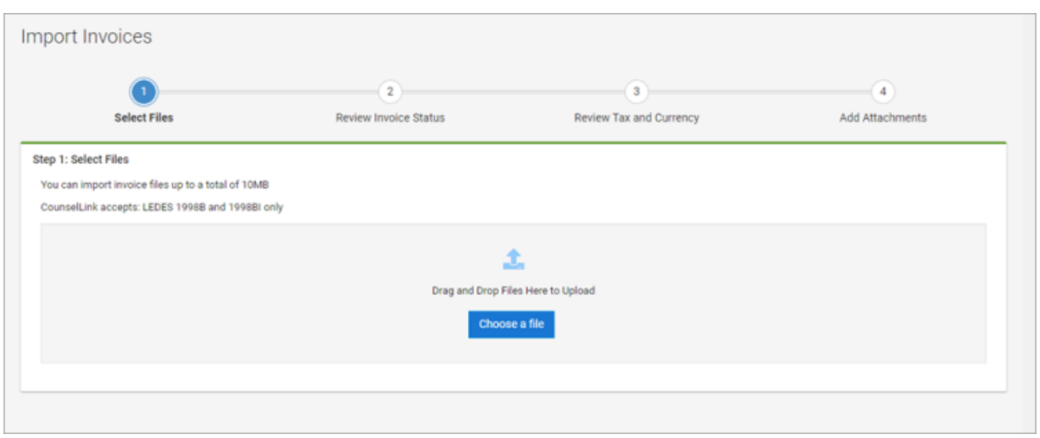
- Click the **Invoice Import** button at the top of the Invoices Search page.



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



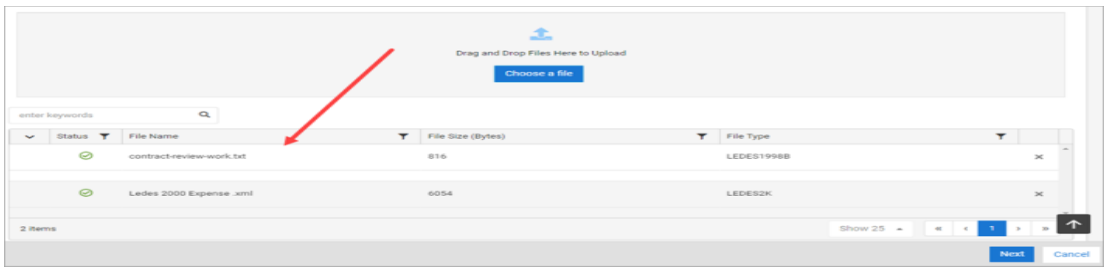
The Import Invoices page displays.



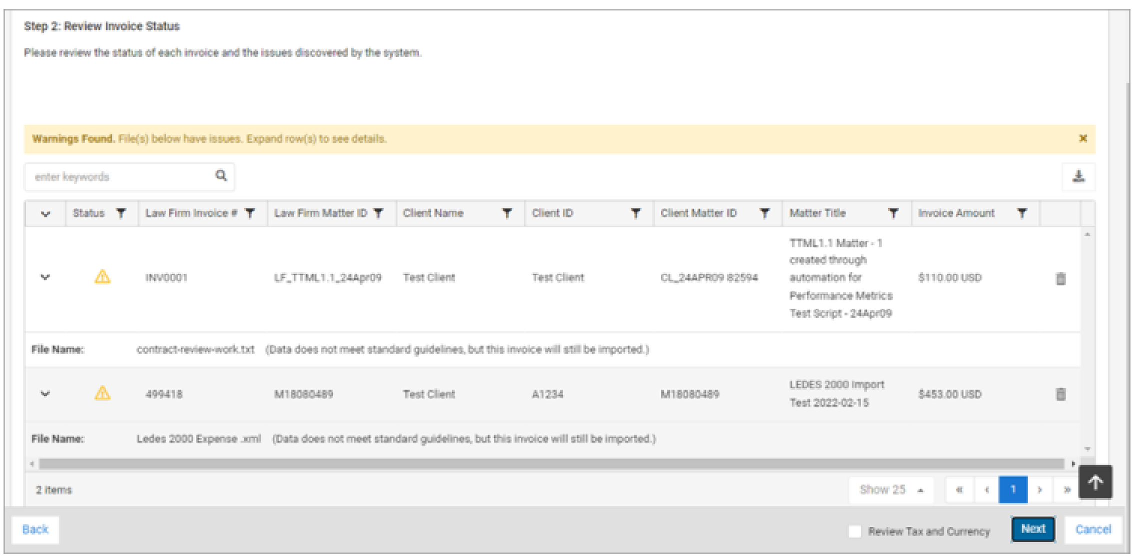
2. **Choose a File** to upload from your computer, or drag and drop the LEDES file from your desktop.

> 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.

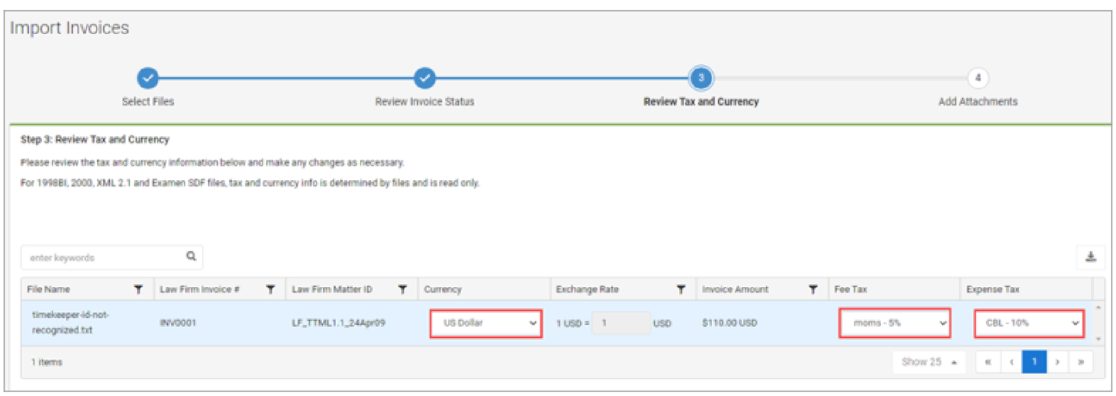
> You can group invoices by status by clicking the filter icon ( )in the Status column. You can also use the search field to find a particular invoice in the list.

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.

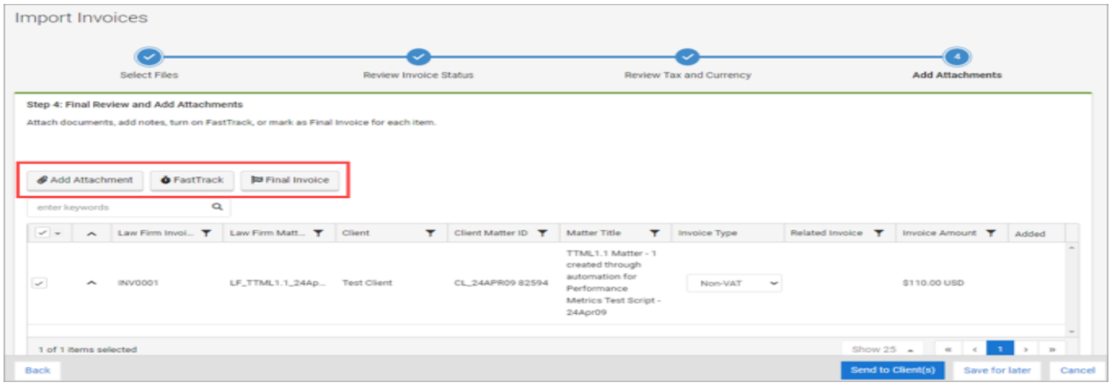
> This step is used primarily for 1998B files, where you can manually select your currency and tax selections for each invoice. If you forget to select Review Tax and Currency, you can click the **Back** button to return to Step 2.

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.



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



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.

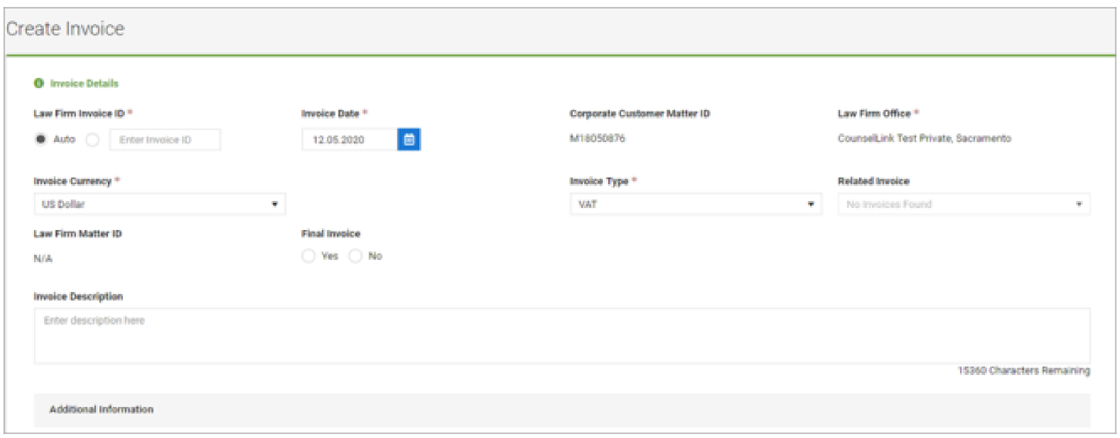
Create an Invoice within CounselLink

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



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 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.

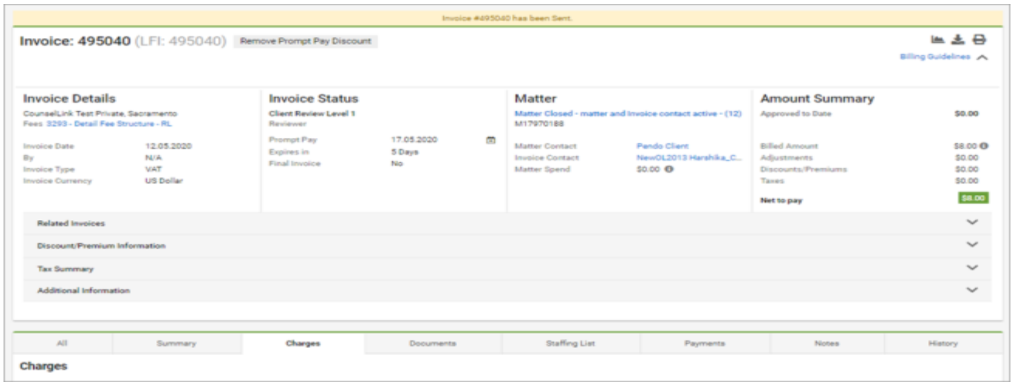
     - Click **Save**.

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

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

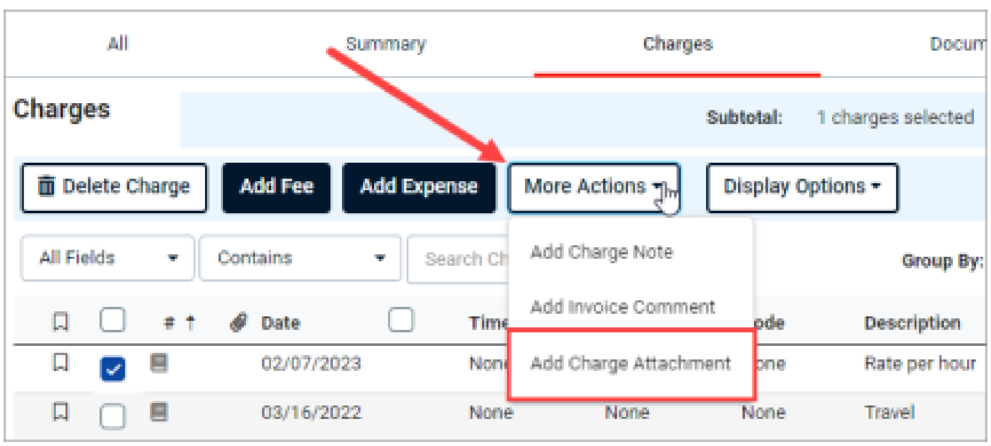
     - Click **Save**.

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

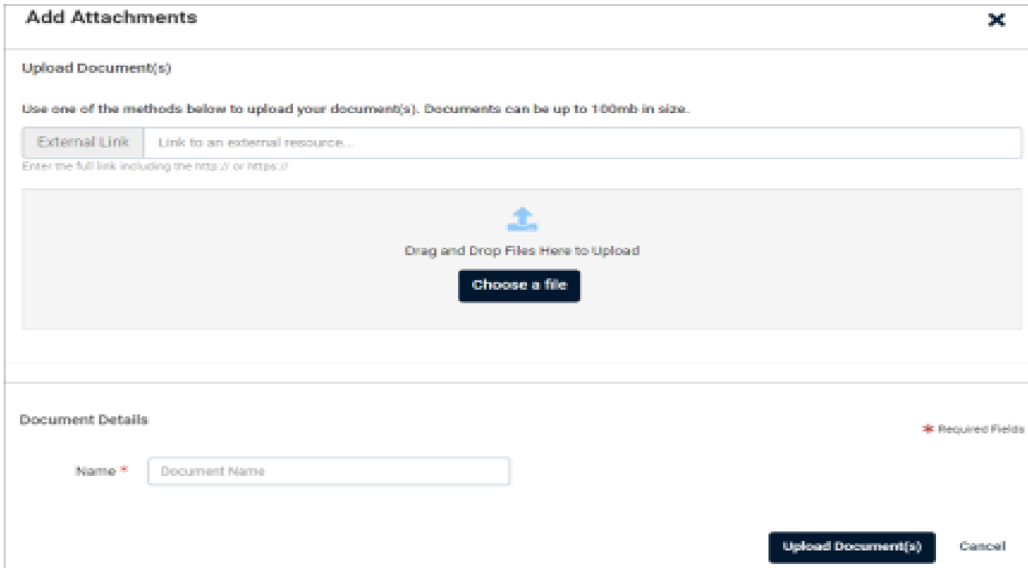


9. Optional: Add supporting documents to a charge line if necessary.

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



The Add Attachments window displays.



- 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, or call +1-919-378-2713 or 1-800-600-2282.