

LEDES Billing

Objectives:

- [Enable LEDES in Lexzur](#)
- [Add LEDES Line Items \(Fees and Expenses\)](#)
- [Create an Invoice and Export to LEDES Format](#)

Steps:

LEDES (Legal Electronic Data Exchange Standard) is a set of formats and guidelines used for the electronic exchange of legal billing information. It provides a standardized way for law firms and legal departments to submit and receive detailed billing information electronically.

Enable LEDES:

To enable LEDES billing, navigate to the billing settings: **Advanced Settings Setup and Configuration:**

The screenshot shows the Lexzur Advanced Settings Setup and Configuration page. The top navigation bar includes 'Dashboards', 'Clients', 'Invoices', 'Expenses', 'Time Entries', 'Suppliers', 'Partners', 'Reports', and 'Advanced' (which is selected). The right side of the navigation bar shows 'App4legal - AED'. The main content area is divided into several sections: 'Entities', 'Expenses', 'Partners', 'Invoices', 'Money', and 'Bills'. The 'Money' section is highlighted with a red box, and a red arrow points to the 'Setup & Configuration' option within it. The 'Money' section lists the following options: 'Setup & Configuration', 'Users Rate per Hour', 'Default Exchange Rate', 'Time Entries Sales Account', 'Advisor Time Entries Expense Account', 'Invoice Number Prefix', 'Credit Note Number Prefix', 'Debit Note Number Prefix', 'Set Prefix for Account Types', and 'Trust Account'.

Navigate to the **LEDES Billing** tab and enable it. Once enabled, The UTBMS code sets will be visible, allowing you to input the necessary codes tailored to your business requirements. These sets will subsequently determine the task codes in time entries and expense categories. Simply click on the blank to add new code sets.



These sets may differ between countries, with each country employing its own distinct sets.

LEXZUR Dashboards Agile Contacts Matters Tasks Contracts & Documents A.I. Reports Time Billing More Create + Universal Search

Dashboards Clients Invoices Expenses Time Entries Suppliers Partners Reports Advanced App4legal - AED

Settings / Setup & Configuration

- Activate Taxes
- Bill Languages
- Bill Values
- Expenses Values
- Invoice Services
- Invoice Languages
- Invoice Status Values
- LEDES Billing**
- Module Languages
- Money Currency
- Partner Statement Languages
- Partner's Settlements Per Invoice
- User Rates

Save All

Property	Default Value	Actions
Enable LEDES ?	Yes	Save
UTBMS Code Sets ?	<ul style="list-style-type: none"> ABA Bankruptcy ABA Counseling ABA Litigation ABA Project EW Civil Litigation LOC eDiscovery LOC GRC UTBMS LOC Patent LOC Trademark Workers' Compensation 	Save

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Activation of LEDES is required at the client level as well. To enable LEDES for a client, navigate to the client's account page, access "**other details**," and activate the LEDES option.

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PER00000131
 Adam Smith
 Client Type: Person
 Trust: 0.00 AED

General Info **Other Details** Attachments Partner Shares

Terms: Choose Term ?

Discount (%)*: 0 ?

Save

Enable LEDES Billing ?

If the client is a new addition, you can enable LEDES directly during the client creation process, whether it's a company or a person. Simply select the "client" type, and the LEDES option will appear for activation.

New Company ✕

Name*

Nickname*

Category*
 Client ←

Website

Email

Use semicolons separator (;) to add multiple emails: for ex. john@gmail.com;john@live.com

Address >

Company Details >

Document >

Custom Fields >

LEDES Billing >

Enable LEDES Billing ⓘ ←

Shared With Public Set as Private

Save Save and Create Another Cancel

LEDES Line Items:

Let's proceed by adding a new matter for a client with LEDES enabled. When selecting this client, a new field, the **Client Matter ID**, will appear. This identifier is provided by the client to uniquely identify the matter.

Add Corporate Matter

Cancel send a notification Save & Create New Save

General Info

Name:*
 Legal Advice for Albert on Consultancy Agreement

Practice Area:*
 Consultation استشارة + Practice Area

Arrival Date:*
 2023-11-29 Hijri Date

Client Name:
 Person Albert Smith ←

Client Matter ID: ⓘ
 Client Matter ID

Description:
 Description

When creating a time entry for this client, a new **UTBMS task code** field will now be accessible, containing all the codes for categorizing the time entry, such as research, analysis, meetings, and more.

Time entry ✕

Type*
Matter

Matter*
M00000316: Legal Advice for Albert on Consultancy Agr

Date*
2023-11-29

Effort*
2

Description

Category ? + Add New
A101: Plan and Prepare for

UTBMS Task Code ?
C100: Fact Gathering

Internal Status + Add New
Not Set

Client* Non-Billable ?
Albert Smith

Repeat ?

[> More Fields](#)
[> Audit](#)

Save **Save and duplicate** Cancel

Additionally, you can choose from a default category related to LEDES activity codes. Both the UTBMS task code and the time category are mandatory for creating time entries in LEDES billing.

UTBMS Task Code 

C100: Fact Gathering

B310: Claims Administration and Objections

B320: Plan and Disclosure Statement (including Bu

B410: General Bankruptcy Advice/Opinions

B420: Restructurings

C100: Fact Gathering

C200: Researching Law

C300: Analysis and Advice

C400: Third Party Communication

G111: Analyze the External Business Context

G112: Analyze External Stakeholder and Influencer

Category 

[+ Add New](#)

A101: Plan and Prepare for

Choose One

A101: Plan and Prepare for

A102: Research

A103: Draft/Revise

A104: Review/Analyze

A105: Communicate (within legal team)

A106: Communicate (with client)

A107: Communicate (opponents/other outside cour

A108: Communicate (other external)

 The list of task codes will be associated with the UTBMS code set you selected during the activation of LEDES.

 The category, which includes the codes, is automatically generated when LEDES is enabled, irrespective of the chosen sets. The time Category can be modified from the Settings.

The same process applies when adding expenses related to that specific matter. Specify the expense category, reflecting the UTBMS expense code in LEDES, and complete the remaining fields, including the paid-on date, payment method, amount, and account. In the expenses section, there is also a UTBMS task code, similar to the one in time entries, though it is not mandatory.

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Add New Expense

Expense Category* **E127: Patent and Trade Mark Records** ?

Payment Method* Cash

Paid Through* Cash - USD (1234567894) Add Account

Amount* USD 5000

Balance 0.00 USD

Total Expenses Waiting Approval 0.00 USD

1 USD = 0.27 AED Edit

Paid On* 2023-11-24

Inclusive Tax

Comments

Reference#

Supplier Search

Tax Number

Related Matter 00000316 goto
Legal Advice for Albert on Consultancy Agreement

Relate to Task
 Internal Client
Albert Smith

Non-Billable
 Billable

Client Account
Albert Smith - USD (99)

Add

UTBMS Task Code Choose One ?

Upload Document

Upload Document Choose File No file chosen

Save Save and Create Another

i The list of Expense categories will be associated with the UTBMS code set you selected during the activation of LEDES. It is a mandatory field to add expenses in LEDES billing.

Add New Expense

Expense Category* **E127: Patent and Trade Mark Records** ?

Payment Method*

Paid Through* Add Account

Amount*

Balance

Total Expenses

Paid On*

Inclusive Tax

Comments

- E128: Searching and Monitoring
- E129: Official Fees, excluding post-issuance patent maintenance, trademark renewal fees, and late fees
- E130: Medical Records Costs
- E131: Late Fees
- X101: Copies/Hard Copy Prints/Printing-Black & White (Internal)
- X102: Copies/Hard Copy Prints/Printing-Colour (Internal)
- X103: Copy Service (External)
- X104: Special Handling Copying/Scanning/Imaging

LEDES Format in Invoicing:

Now, proceed to create the invoice for that client as you would for any standard invoice. In LEDES, it's important to note that you can only include one matter in an invoice.

Dashboards Clients **Invoices** Expenses Time Entries Suppliers Partners Reports Advanced App4legal - AED

Client **Matters** Items Additional Info

You are only allowed to select 1 matter when the Client is LEDES enabled.

Matters Related to Albert Smith Corporate Matter, Litigation Case, Matter Container

Matter	Matter Name	Practice Area	Assignee	Status	Billing Status	Billing Method	Time Logs / Expenses / Bill Items
<input checked="" type="radio"/> M00000316	Legal Advice for Albert on Consultancy Agreement	Consultation استشارة	(No Data)	1-Open	Invoiced	Hourly Rate	<input type="button" value="1 Time Logs"/> <input type="button" value="1 Expenses"/> <input type="button" value="1 Bill Items"/>
<input type="radio"/> M00000250	Legal advice for Albert	Legal Opinion	(No Data)	2-Review	To-Invoice	Hourly Rate	<input type="button" value="0 Time Logs"/> <input type="button" value="0 Expenses"/> <input type="button" value="0 Bill Items"/>
<input type="radio"/> M00000272	Albert Vs Telecom Banking Case	Acclaimas	William Singleton	1-Open	To-Invoice	Hourly Rate	<input type="button" value="0 Time Logs"/> <input type="button" value="0 Expenses"/> <input type="button" value="0 Bill Items"/>

< Back Next >

Thus, when the client has LEDES enabled, you are restricted to selecting a single matter. Choose the matter, and import the time entries, expenses, and any billable items that may be available.

Import Time Logs

Filter by Date select an option yyyy-mm-dd Apply Clear

Time Logs Start typing

<input checked="" type="checkbox"/>	Date	Description	Category	User	Effort	Rate	Matter/Task
<input checked="" type="checkbox"/>	2023-11-29	(No Data)	A101: Plan and Prepare for	Carolina Robin (UC22)	2.00	0	Matter: Legal Advice for Albert on Consultancy Agreement

Options

Group time logs by legal practitioner per matter

Use User FullName

Use User Code

Discount select an option Tax select an option

1 Items selected Cancel OK

On the items page, the selected items will be displayed in the invoice, each with its respective codes. These codes will be reflected in the final invoice. Add Services if needed and move to the additional info page. Fill in additional invoice information and save.

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Client Matters **Items** Additional Info

Add Service Import Time Logs Import Expenses Import Bill Items

Time Logs

Date	User	Category	UTBMS Task Code	Description	Effort	Rate	Discount	Tax	Amount
2023-11-29	Carolina Robin	A101	C100	A101: Plan and Prepare for	2	0	0%	0%	0 USD

Expenses

Date	Expense Category	UTBMS Expense Code	UTBMS Task Code	Description	Quantity	Expense Amount	Discount	Tax	Amount
2023-11-24	Patent and Trade Mark Records	E127	B160	2023-11-24	1	5,000	0%	0%	5,000 USD

Bill Items

Date	Account Name	UTBMS Expense Code	Description	Quantity	Unit Price	Discount	Tax	Amount
2023-11-29	Legal Expenses	E125	Translation	1	1,000	0%	0%	1,000 USD

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From the template, you can also track the code for each line item in the LEDES invoice. Users can then export the invoice using the standard Word or PDF formats or using two new LEDES-specific formats: the **LEDES1998B** standard and the **LEDES1998BI** standard.

The LEDES1998BI supports international billing, accommodating different currencies between the entity and the invoice currency. This standard also includes details such as tax, client address, and law firm details.

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Invoice Details Collection Attachments Email

INVO000001 Albert Smith - USD Albert Smith United Arab Emirates

Date: 2023-11-29 Due On: 2023-12-29 Reference Number: 12563 Terms: 30 days P.O#: 25855 Description: (No Data)

Summary USD AED Exchange Rate (When Issued) 1 USD = 15000 AED Sub Total USD 6,000.00 Total Tax USD 0.00 Total USD 6,000.00

Invoice Template: Tax Invoice Invoice Status: Open Approval Status: Approved

Matter ID: 00000316 Matter Name: Legal Advice for Albert on Consultancy Agreement Invoice #: INV0000001 Invoice Ref: 12563 Status: Open Date: 2023-11-29 Due On: 2023-12-29 Terms: 30 days P.O#: 25855

Bill To: Albert Smith United Arab Emirates Tax Number: 125639

Legal Costs

Date	Service	UTBMS Codes	Description	Quantity	Unit Price	Tax	Amount (USD)
2023-11-29	Patent and Trade Mark Records	E127: Patent and Trade Mark Records - B160 Fee/Employment Applications	2023-11-29	1.00	5,000.00	0.00%	5,000.00

Total (Legal Costs): 5,000.00 USD

Time Logs

Date	Item	UTBMS Codes	Description	Hours	Rate	Tax	Amount (USD)
2023-11-29	Carolina Robin	A101: Plan and Prepare for - C100: Fact Gathering	A101: Plan and Prepare for	2.00	0.00	0.00%	0.00

Total (Time Logs): 0.00 USD

Bill Items

Date	Item	UTBMS Codes	Description	Quantity	Unit Price	Tax	Amount (USD)
2023-11-29	Legal Expenses	E125: Translation	Translation	1.00	1,000.00	0.00%	1,000.00

Total (Bill Items): 1,000.00 USD Sub Total: 6,000.00 (USD) Total (Tax): 0.00 (USD)

Export to Word Export to PDF Export to LEDES1998B Export to LEDES1998BI

The exported invoice will present all the necessary details using LEDES format.

```
SquirrelSetup INV0000001-1998BI
File Edit View
|LEDES1998BI[]
INVOICE_DATE|INVOICE_NUMBER|CLIENT_ID|LAW_FIRM_MATTER_ID|INVOICE_TOTAL|BILLING_START_DATE|BILLING_END_DATE|INVOICE_DESCRIPTION|LINE_ITEM_NUM
BER|EXP/FEE/INV_ADJ_TYPE|LINE_ITEM_NUMBER_OF_UNITS|LINE_ITEM_ADJUSTMENT_AMOUNT|LINE_ITEM_TOTAL|LINE_ITEM_DATE|LINE_ITEM_TASK_CODE|LINE_ITEM
EXPENSE_CODE|LINE_ITEM_ACTIVITY_CODE|TIMEKEEPER_ID|LINE_ITEM_DESCRIPTION|LAW_FIRM_ID|LINE_ITEM_UNIT_COST|TIMEKEEPER_NAME|TIMEKEEPER_CLASSIFI
CATION|CLIENT_MATTER_ID|PO_NUMBER|CLIENT_TAX_ID|MATTER_NAME|INVOICE_TAX_TOTAL|INVOICE_NET_TOTAL|INVOICE_CURRENCY|TIMEKEEPER_LAST_NAME|TIMEKE
EPER_FIRST_NAME|ACCOUNT_TYPE|LAW_FIRM_NAME|LAW_FIRM_ADDRESS_1|LAW_FIRM_ADDRESS_2
|LAW_FIRM_CITY|LAW_FIRM_STATEorREGION|LAW_FIRM_POSTCODE|LAW_FIRM_COUNTRY|CLIENT_NAME|CLIENT_ADDRESS_1|CLIENT_ADDRESS_2
|CLIENT_CITY|CLIENT_STATEorREGION|CLIENT_POSTCODE|CLIENT_COUNTRY|LINE_ITEM_TAX_RATE|LINE_ITEM_TAX_TOTAL|LINE_ITEM_TAX_TYPE|INVOICE_REPORTED_
TAX_TOTAL|INVOICE_TAX_CURRENCY[]
20231129|INV0000001|145|316|6000.00|20231129|20231229|Bank number: 12345432Address: Qatar|1|F|2.00|0.00|0.00|20231129|C100|A101|22|A101:
Plan and Prepare for|0010|0.00|Robin, Carolina|||25855|125639|Legal Advice for Albert on consultancy Agreement|0.00|6000.00
|USD|Robin|Carolina|0|App4Legal-AED|||||AE|Albert Smith|||||AE|0.00|0.00|0.00|AED[]
20231129|INV0000001|145|316|6000.00|20231129|20231229|Bank number: 12345432Address: Qatar|2|E|1.00|0.00|5000.00|20231129|B160|E127|||
2023-11-29|0010|5000.00|||25855|125639|Legal Advice for Albert on Consultancy Agreement|0.00|6000.00|USD|||0|App4Legal-AED|||||AE|Albert
Smith|||||AE|0.00|0.00|0.00|AED[]
20231129|INV0000001|145|316|6000.00|20231129|20231229|Bank number: 12345432Address: Qatar|3|E|1.00|0.00|1000.00|20231129||E125
|||Translation|0010|1000.00|||25855|125639|Legal Advice for Albert on Consultancy Agreement|0.00|6000.00|USD|||0|App4Legal-
AED|||||AE|Albert Smith|||||AE|0.00|0.00|0.00|AED[]

Ln 1, Col 1 100% Unix (LF) UTF-8
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For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!