

How to Manage Matter's Rates and Billing Preferences

Objective

- Set User's Rate for Matters
- Set a Matter Rate
- Enable Capping
- Add Partner's Percentage
- Set Matter Billing Preferences

Steps

In LEXZUR, you have the flexibility to adjust user rates for specific Matters. The Settings tab allows you to establish the User Rate per Hour, providing a precise way to define the rate applicable to a particular matter or for a specific user's time logs. To modify user rates, simply click on **"User Rate per Hour"** and manually set the rate for the desired user. This adjustment can be made for multiple users simultaneously, streamlining the process.

The screenshot shows the LEXZUR interface for a matter titled "M00000341 Legal Advice for Maria". The "Settings" tab is selected in the left sidebar. The "User Rate per Hour" tab is active, showing a table with one row: "Rate Per Hour" set to 200.00, "Related Entity" as "app4legal (USD)", "First Name" as "Katrina", "Last Name" as "diab", and "Seniority level" as "Lawyers". The "Save" button is highlighted in the top right corner.

Additionally, you can set the rate for the entire matter. Navigate to the **Matter Rate** Tab,

The screenshot shows the LEXZUR interface for the same matter. The "Matter Rate" tab is selected, showing a table with one row: "Rate Per Hour" set to 200.00, "Related Entity" as "app4legal (USD)". The "Save" button is highlighted in the top right corner.

Click on **"Actions Add a matter rate"** select your entity, and set the Rate per Hour accordingly.

The screenshot shows the "Add a matter rate" dialog box. The "Entities" dropdown is set to "app4legal (USD)" and the "Rate Per Hour" is set to 200. The "Save" button is highlighted.

Moreover, within the Capping Tab, you have the option to establish a maximum capping limit. Enabling a capping amount prevents users from exceeding the defined limit.



Once this limit is reached, the system will restrict users from adding any further time logs, thus ensuring financial compliance and control.

M00000287 Legal Opinion on Service Agreement
Matter - Corporate Matter

General Info Tasks Reminders Emails Bills Attachments Expenses Time Entries Matters Contracts & Documents **Settings**

Trust 8,520.00 USD Paid 0.00 USD Due 0.00 USD Billable 0.00 USD

User Rate Per Hour Matter Rate **Capping** Partners Percentage Billing Preferences

Enable Cap Yes

Allow Exceed No

Cap

Cap Amount 20000 (USD)*

Save

Moreover, LEXZUR offers the flexibility to determine Partners' Percentages through the dedicated tab. Search for partner name, and specify the percentage.

M00000341 Legal Advice for Maria
Matter - Corporate Matter

General Info Tasks Reminders Emails Bills Attachments Expenses Time Entries Invoices Matters Contracts & Documents **Settings**

Trust 14,400.00 USD Paid 0.00 USD Due 0.00 USD Billable 0.00 USD

User Rate Per Hour Matter Rate Capping **Partners Percentage** Billing Preferences

+ Add partner share

Partner Percentage

Partner Percentage

Save

You can precisely set billing preferences as well, whether it's based on hourly rates or fixed fees for the matter(lump sum payments).

✓ Learn more about how to use lump sum in matters [here](#).

M00000287 Legal Opinion on Service Agreement
Matter - Corporate Matter

General Info Tasks Reminders Emails Bills Attachments Expenses Time Entries Matters Contracts & Documents **Settings**

Trust 8,520.00 USD Paid 0.00 USD Due 0.00 USD Billable 0.00 USD

User Rate Per Hour Matter Rate Capping Partners Percentage **Billing Preferences**

Billing Method Fixed Fee

Entity app4legal (USD)

Invoice Service consultation

Fixed Fee (USD) 10000

Set Default Matter Time Entries Status to Billable

Save

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!