

How to Log Time on Corporate Matters

Objectives

- Add time entries related to a corporate matter.
- Record the time on matters using a timer.

Steps

The Time Tracking module In LEXZUR enables you to track your time manually by adding your time logs, or automatically by using the timer embedded inside the system.

To do that, simply open the matter, click on the **Time Entries** tab, click on the **Actions** button, then choose "Time entry", to record the time spent on a particular activity.

M

M00000229 Legal Opinion on Purchase Agreement for BLP

Matter - Corporate Matter

General Info

Tasks

Reminders

Emails Now

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

Trust7,520.00 USD

Paid2,100.00 USD

Due0.00 USD

Billable

☐	Date	User	Effort	Rate	Category	Internal Status	Billable	Description
☐	2023-05-26	James Marven	1h (1.00h)	Default Rate	Meeting	To-Be Reviewed	Yes	Meeting with the
☐	2023-05-26	James Marven	30m (0.50h)		Meeting	To-Be Reviewed	No	Meeting with the
☐	2023-05-23	Carolina Robinson	1h (1.00h)	Default Rate		To-Be Reviewed	Yes	
☐	2023-05-23	Carolina Robinson	1h (1.00h)	Default Rate	Planning	To-Be Reviewed	Yes	FRA-CT-202305 *Employment Co

Save

Actions

Time entry

Export to Excel

Start Timer

Bulk Transfer to another Matter

Filter

Related EntityApp4Legal-USD (USD)

UserUsername

FromYYYY-MM-DD

ToYYYY-MM-DD

Balance

Total Effort3h 30m

Billable3h

Non-billable30m

Total1,500.00 USD

i

You can also add any time entry directly from the **Create** button, and link it to the desired matter.

The image shows a 'Create +' button in a dark blue header. A dropdown menu is open, listing various entity types. The 'Time entry' option is highlighted with a blue background and a red arrow pointing to it. Other options include Company, Person, Corporate Matter, Litigation Case, Hearing, Matter Container, Contract/Document from Template, Upload Contract/Document, Intellectual Property, Task, Expense, Invoice, Meeting, and Reminder.

Adding time entries from the matter's page automatically sets some values, such as **Type** and the **Matter name**.

Likewise, the current **date** is set. However, you may choose another date and indicate the **Effort** logged in hours.

The **Client Name** is automatically retrieved from the related matter's information as well.

The image shows the 'Time entry' form. Red arrows point to the following fields: 'Type*' (set to 'Matter'), 'Matter*' (set to 'M00000229: Legal Opinion on Purchase Agreement for...'), 'Date*' (set to '2023-06-16'), 'Effort*' (set to '2:30'), and 'Client*' (set to 'BLP industry'). Other fields include 'Description' (a text area), 'Category' (set to 'Meeting'), 'Internal Status' (set to 'Reviewed'), 'Non-Billable' (checkbox), 'Repeat' (checkbox), and 'Save', 'Save and duplicate', and 'Cancel' buttons at the bottom.

Time log entries are billable by default unless you check the non-billable box.

Additionally, admins can choose the user related to such time entry and the user rate. Therefore, they can choose between either the system's predefined rate or a fixed rate.

Time entry

✕

Type*

Matter

Date*

2023-06-16

Description

User*

Carolina Robinson

User Rate

System Rate

Less Fields

Audit

Matter*

M00000229: Legal Opinion on Purchase Agreement for BLP

Effort*

2:30

Category

Meeting

Internal Status

Reviewed

Client*

BLP industry

To Date*

06/23/2023

Rate

500.00

☐ Non-Billable

☒ Repeat

Save

Save and duplicate

Cancel

Time Logs could also be repeated on a daily basis. Check the **Repeat** option and set the **To Date**.

 Weekend days and holidays will not be included in the repeated time logs.

Furthermore, you can also log time automatically by starting the timer embedded inside the system.

Click on the timer within the navigation menu **Start Timer**.

Choose the Type and specify the matter name, choose a category, and add comments if needed.

Start Timer

✕

☒ Matter
 ☐ Task
 ☐ Contract/Document

Matter*

M00000229: Legal Opinion on Purchase Agreement for BLP

Category

Drafting

Comments

Start Timer

Cancel

Upon finishing, you will have the option to pause or end the timer, and the system will automatically calculate and log the time to the related matter.

Universal Search

Manage Timer

Start Timer

No Task

M00000229 - Legal Opinion on Purchase Agreement for BLP

No Contract

No Description

00:00:10

End Timer

No Task

M00000237 - legal opinion on Service Agreement

No Contract

No Description

02:02:05

End Timer

To end the timer, click on **"End Timer."** Specify the client name and indicate whether it is billable or an internal time log. Finally, select the option to end the timer.

End Timer

☒ Matter ☐ Task ☐ Contract/Document

Matter* legal opinion on Service Agreement

☐ Internal ☒ Billable

Client* BLP industry

Category Administration

Comments

End Timer Cancel Timer

Cancel

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

Thank you!