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M M00000285 Legal Advice for Banking Issue  
Matter - Corporate Matter ⓘ

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

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

Billing Method: Hourly Rate

Save

Hourly Rate

Fixed Fee

- Under billing preferences, select the "fixed fee" billing method. (You can also directly choose the fixed fee option upon creating the matter)

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

Trust 14,400.00 USD Paid 0.00 USD Due 0.00 USD Billable 600.00 USD

User Rate Per Hour Matter Rate Capping Partners Percentage Billing Preferences

Billing Method: Fixed Fee

Entity: App4Legal-USD (USD)

Invoice Service: Consultancy

Fixed Fee (USD): 500.00

Set Default Matter Time Entries Status to Billable

For the existing unbilled Time Entries Related to this matter, you can:

☒ Make no status changes

☐ Mark Time Entries as non-billable

Save

- You will then need to provide specific details such as the **Entity**, **Invoice Service**, and the corresponding **fixed fee** for that matter.



If there are any existing unbilled time logs for this matter, you have the option to change their status directly to "Non-billable" from this section.

Once the Lump Sum feature is enabled, you can seamlessly utilize it in invoices.

When selecting the matter associated with the client, any fixed fee amounts that have not yet been invoiced will be displayed alongside the relevant time logs, expenses, and bill items.

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App4Legal-USD - USD

Client

Matters

Items

Additional Info

Matters Related to Maria Smith

Corporate Matter, Litigation Case, Matter Container

Matter	Matter Name	Practice Area	Assignee	Status	Billing Status	Billing Method	Time Logs / Expenses / Bill Items
<input type="checkbox"/>	Type	Type	Select	Type	Select	Select	
<input type="checkbox"/>	M00000261	Commercial Consultation for Maria	Commercial	Carolina Robinson	1-Review	Invoiced	<div>Fixed Fee</div> <div><input checked="" type="checkbox"/> Fixed Fee</div> <div><input type="checkbox"/> Hourly Rate</div> <div>0 Time Logs</div> <div>0 Expenses</div> <div>0 Bill Items</div> <div>Fixed Fee:5000.00</div>
<input checked="" type="checkbox"/>	M00000285	Legal Advice for Banking Issue	Banking & finance	James Marven	2-In Progress	Invoiced	<div>Fixed Fee</div> <div>0 Time Logs</div> <div>0 Expenses</div> <div>0 Bill Items</div> <div>Fixed Fee:500.00</div>

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The service linked to this fixed fee (previously chosen for the matter) will be automatically added as a service item in the invoice, streamlining the billing process and ensuring accurate invoicing for the specified fixed-rate services.

Dashboard

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App4Legal-USD - USD

Client

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Add Service

Import Time Logs

Import Expenses

Import Bill Items

Services

Date	Service Name	Description	Quantity	Unit Price	Tax	Amount	
2024-02-07	Consultancy		1	500	0%	500 USD	<div></div>

Total Discount (At Invoice Level Before Tax)

0.0%

Percentage

Adjustment

0.0%

Percentage

Sub Total

USD 500.00

Discount Amount

USD 0.00

Sub Total After Discount

USD 500.00

Adjustment Amount

USD 0.00

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Once the Lump Sum feature is enabled and applied to a matter for billing, it cannot be changed back to the hourly rate option at a later time. However, you can still add time logs and expenses and invoice them separately.

Matter related Invoices will be then easily accessible from the Matter page under the Invoice Tab

M

M00000285 Legal Advice for Banking Issue

Matter - Corporate Matter

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Financial

Trust14,400.00 USD

Paid0.00 USD

Due500.00 USD

Billable0.00 USD

Invoices

Actions

Invoice Date	Invoice#	Prefix Type	Client's Account	Total	Balance Due	Currency
2024-02-07	INV0000152	Invoice Number Prefix	Maria Smith - USD	500.00 USD	500.00	USD

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Filter

Related EntityApp4Legal-USD (USD)

CurrencyUSD

Billing Preferences

Billing MethodFixed Fee

Fixed Fee500.00 USD

Sub Total

Services500.00 USD

Expenses0.00 USD

Time Entries0.00 USD

Bill Items0.00

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!