

LEDES Billing

Objectives:

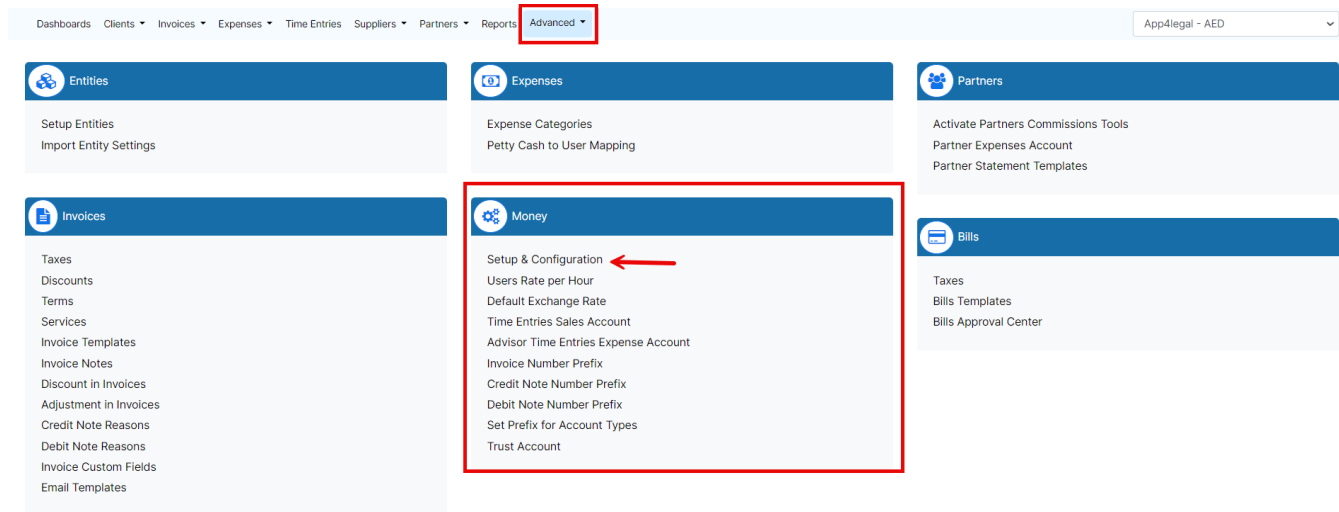
- [Enable LEDES in Lexzur](#)
- [Add LEDES Line Items \(Fees and Expenses\)](#)
- [Create an Invoice and Export to LEDES Format](#)

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:**



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.

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[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 ?	<div> <div>ABA Bankruptcy</div> <div>ABA Counseling</div> <div>ABA Litigation</div> <div>ABA Project</div> <div>EW Civil Litigation</div> <div>LOC eDiscovery</div> <div>LOC GRC UTBMS</div> <div>LOC Patent</div> <div>LOC Trademark</div> <div>Workers' Compensation</div> </div>	Save

LEXZUR

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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

More Details

Date & Time

People

More Details

Custom Fields

Matter rate

Billing Preferences

Custom Pages

Billing and Financials

General Info

Name*

Legal Advice for Albert on Consultancy Agreement

Practice Area*

Consultation استشارة

Arrival Date*

2023-11-29

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 Ag

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

Legal Advice for Albert on Consultancy Agreement

goto

Relate to

☐ Task

☐ Internal

☒ Client

Albert Smith

Search

☐ 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

E127: Patent and Trade Mark Records

?

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.

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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
Type	Type	Select	Type	Select	Select	Select	
<input checked="" type="radio"/> M00000316	Legal Advice for Albert on Consultancy Agreement	Consultation	(No Data)	1-Open	Invoiced	Hourly Rate	1 Time Logs 1 Expenses 1 Bill Items
<input type="radio"/> M00000250	Legal advice for Albert	Legal Opinion	(No Data)	2-Review	To-Invoice	Hourly Rate	0 Time Logs 0 Expenses 0 Bill Items
<input type="radio"/> M00000272	Albert Vs Telecom Banking Case	Acclaimas	William Singleton	1-Open	To-Invoice	Hourly Rate	0 Time Logs 0 Expenses 0 Bill Items

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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

☒ Date
☒ 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

Account Name	UTBMS Expense Code	Description	Quantity	Unit Price	Discount	Tax	Amount
--------------	--------------------	-------------	----------	------------	----------	-----	--------

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

INV0000001

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)

Matters Linked
Related Suppliers Bills

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

Invoice #: INV0000001
Invoice Ref: 12563
Status: Open
Date: 2023-11-29
Due On: 2023-12-29
Terms: 30 days
P.O#: 25855

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	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.

SquirrelSetupINV0000001-1998BI

FileEditView

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

Thank you!