

How to Log Time and Add Expenses to Contracts

Objectives

- Log and Track Time entries to contracts/documents
- Add expenses to contracts/documents

Steps

- **Time Entries:**

In LEXZUR, time can be recorded manually by clicking the quick **Create** button and selecting "Time entry" or automatically by using the timer.

You can also log time using the time entries tab of the contract or document.

The screenshot shows the LEXZUR interface for a contract named "CT157 - Brandy Translation Purchase Agreement". The "Time Entries" tab is active, displaying a table with columns: Date, User, Effort, Rate, Category, Billable, Description, Client, Status, and Created By. A red box highlights the "Actions" menu in the top right of the table, which includes options like "Log Time", "Start Timer", and "Export to Excel". The right-hand panel shows a "Balance" section with a summary of Total Effort (13h 32m), Billable (6h), Non-billable (7h 32m), and Total (1,600.00 USD).

To add a new time entry, you must fill out the following mandatory fields: Type, Contract name, Date, Effort, and Client name.

The "Time entry" form is displayed with the following fields and values:

- Type*: Contract/Document
- Contract/Document*: CT157: Brandy Translation Purchase Agreement
- Date*: 2023-01-20
- Effort*: 2
- Category: Meeting
- Internal Status: To-Be Reviewed
- Client*: Brandy Translation
- Repeat:

Buttons at the bottom: Save, Save and duplicate, Cancel.

- Type: The type should be the contract/document to which the time is logged.
- Contract/Document: Enter the contract/document name or ID.
- Effort: Time logged in hours.
- Client: Whenever the time entry is billable, the client associated with the contract is required.

Additionally, using the Timer feature, the system will calculate the time automatically in hours and add the effort accordingly.

Universal Search

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Manage Timer

Start Timer

No Task 00: 00: 12

No Matter

End Timer

CT157 - Brandy Translation Purchase Agreement

No Description

Start Timer

Matter Task Contract/Document

Contract/Document* CT157: Brandy Translation Purchase Agreement

Category Meeting

Comments

Start Timer Cancel

Click on the Timer in the main menu to start. You will be asked to choose the type, like Contract/Document, specify the contract name, and you can add the category and comments.

Once you end the timer, the recorded time will be added to the corresponding time log page.

- **Expenses:**

From the **Expenses** tab within each contract/document, click on Actions to add a new expense.

CT157 - Brandy Translation Purchase Agreement

Related Expenses

Paid On	Expense ID	Reference #	Expense Category	Expense Amount	Currency	Paid Through	Billing Status	Status	Client Name	Related Task	Related	Actions
2023-01-20	00000133		Printing & Copying	100.00	USD	Cash account	to-invoice	Approved	Brandy Translation		App4Leg	<ul style="list-style-type: none"> Add Expense Bulk Expenses Statement of Expenses Export to Excel

Expenses **New**

You must fill out the following mandatory fields: Expense Category, Payment Method, the Paid Through Account, Amount, and Paid on Date.

Add New Expense

App4Legal-USD [Cancel] [Save & Create New] [Save]

- Expense Info
- Expense Allocations
- Analytic Accounts

Expense Info

Expense Category * Office / Internet & Telephone

Payment Method * Credit Card

Paid Through * Alice Card Account - USD (CC1)

Balance: USD -3,780.00
Total Expenses Waiting Approval: USD 6,000.00

Amount * 500 USD

Paid On * 2024-01-10

Inclusive Tax select an option

Reference #

Supplier Start typing

Comments

Additionally, from the Expense Allocations tab, you can relate the expense to the contract you are dealing with and expenses may be internal or client-related, which are either billable or non-billable.

Once you record all the expenses related to the contract/document you can preview them in the grid, and you can export them into a spreadsheet for other reporting purposes.

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

Thank you!