THOMSON REUTERS LEGAL TRACKER

QUICK REFERENCE GUIDE

LAW FIRM BILLING MANAGERS

Document Version 2021-1

THOMSON REUTERS®

DOCUMENT VERSION HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
2019-1	September 2019	New edition, revised for the current Legal Tracker interface.
2021-1	July 2021	Revised information about training resources to include the Legal Tracker Learning Management System.

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WHAT IS LEGAL TRACKER?

Legal Tracker is the world’s leading legal matter management, e-billing, and legal analytics system designed for corporate legal departments.

With Tracker's newly reimagined interface you can access your current matter information and submit invoices, status reports, budgets and documents electronically. More than 400 different reports help you analyze the legal work, spending, results and performance regarding your matters.

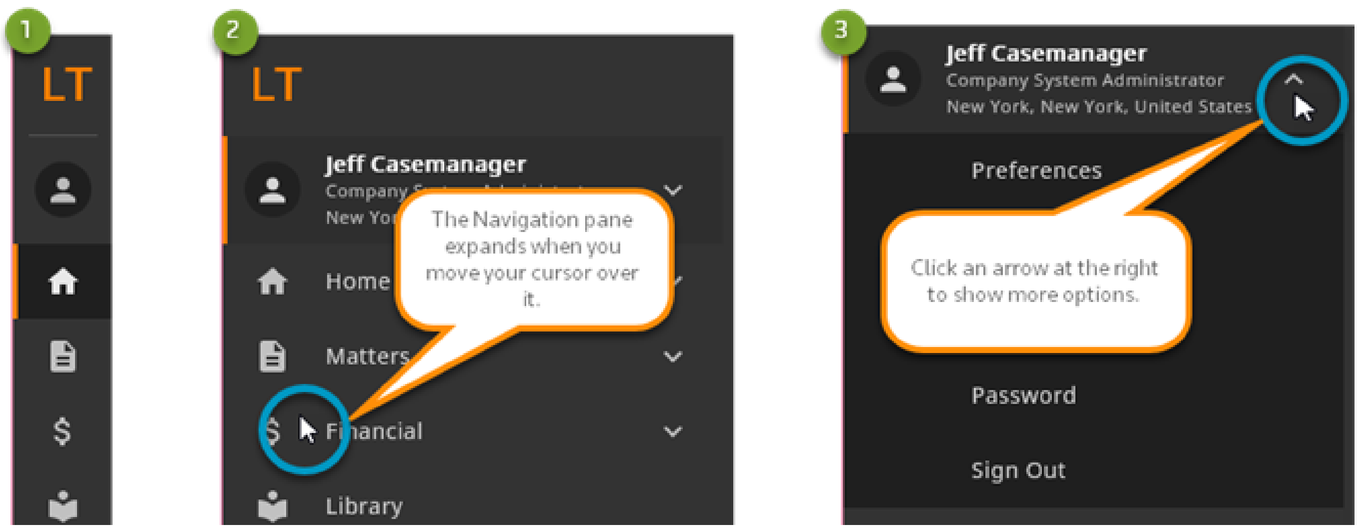
The Tracker platform is a native web-based application. All you need is an internet connection and a browser. We recommend you use one of the following browsers for best results:

- Google Chrome™
- Microsoft® Edge®
- Firefox®
- Safari®
- Microsoft® Internet Explorer®

To learn more about Tracker, visit legaltracker.com.

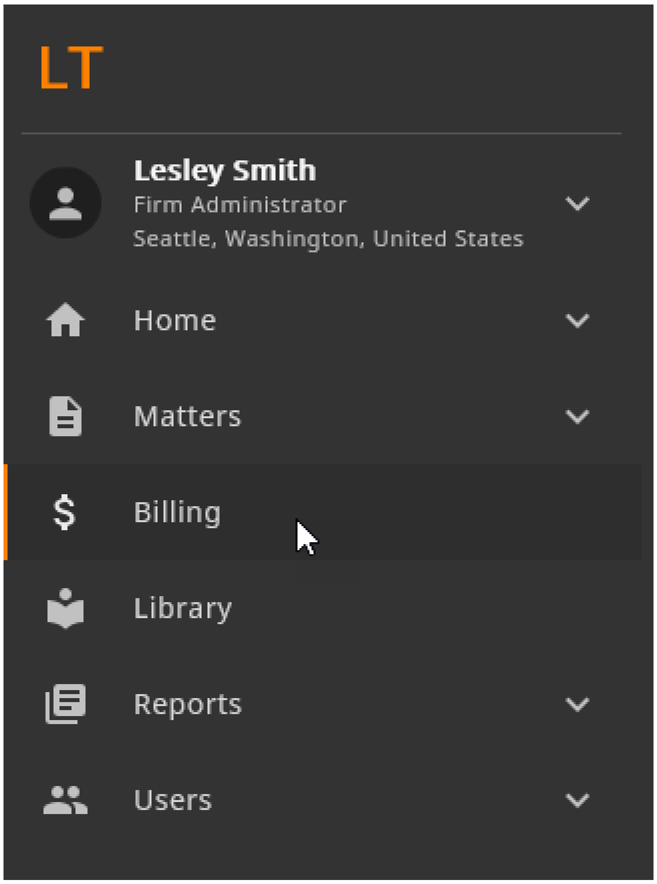
USING THE NAVIGATION PANE

At the left of every page in Tracker is a dark gray bar with icons. When you move your cursor over the bar, it expands to show a menu of the available functions in Tracker. Note that your Tracker screen may look a little different, depending on your Tracker role. If there is a down arrow to the right of a menu item, you can click it to show more menu options.



BILLING

The most important tasks you will need to use as a billing manager are in the **Billing** module in the left navigation.



ENTER OR EDIT YOUR FIRM CLIENT AND FIRM MATTER NUMBERS FOR INVOICES

To enter your firm client and firm matter numbers, matter name and location of legal work:

1. Select **Billing** in the left navigation.
2. Click the **Matter #s** tab.
3. Click **Edit firm client & matter #** in the matter you want to work with.

4. Enter the firm client number, firm matter number and firm name in the **FIRM CLIENT #**, **FIRM MATTER #** and **FIRM MATTER NAME** fields.
5. If the location is not already listed, under **LOCATION OF LEGAL WORK**, click **Select** then select the location from the list.
6. If you need to enter information for additional matters, click **Assign additional firm client & matter #** and enter the information in the fields as explained in step 4.
7. Click **Save**.

EDIT, DELETE, OR MOVE INVOICES

You can alter an invoice by selecting **Billing** in the left navigation or from within a matter. Firms cannot move LEDES invoices posted by SpeedPost or that were posted to a Consolidated Billing Matter because Tracker relies on the firm, client and matter number to route the invoices. Firms need to ask their clients to move invoices when either posting method is used. If a client does not want to move an invoice, firms need to repost the invoices with a new invoice number to correct the matter.

1. Click **Billing** in the left navigation.
2. Check that you are on the **View invoices** page view. (If unbilled amounts are due, Tracker displays the **Accruals**page view by default).
3. Use the view selector to specify which invoices you want to view (all, pending, approved, or rejected), then click **Change view**.
4. Click the invoice number of the invoice you want to work with.
5. Click **Invoice** on the toolbar.
6. Complete one of the following:
   - To edit or move the invoice, click **Edit / move** in the toolbar. To move the invoice to another matter, click **Change matter** for the **Matter Name** field then select the new matter. To edit the invoice, make your changes.
   - To delete the invoice, click the ellipsis (•••) in the toolbar then select **Delete**.
7. Click **Close** on the toolbar.

Edit, Move or Delete an Invoice from within a Matter

1. Click **Matters > Matter List** in the left navigation.
2. Click the matter name for the applicable matter.
3. Click **Invoices**. You may need to complete this step if **Accruals** displays because unbilled amounts are due.
4. Click the invoice number for the invoice you want to edit, delete or move.
5. Click **Invoice**.
6. Complete one of the following:
   - To edit or move the invoice, click **Edit / move** in the toolbar. To move the invoice to another matter, click **Change matter** for the **Matter Name** field then select the new matter. To edit the invoice, make your changes.
   - To delete the invoice, click the ellipsis (•••) in the toolbar then select **Delete**.
7. Click **Save & close** in the toolbar.

Moving an Invoice to a Different Matter When Reposting

If Company addresses audits on an invoice and rejects it, a firm cannot move the invoice to a different matter when reposting. If this happens, the firm must post new invoice to the correct matter using a new invoice number.

INVOICING | OVERVIEW

There are many different electronic formats available for creating invoices and you can submit an electronic invoice in any format that your client accepts. Tracker defines two different categories of electronic invoices: LEDES and non-LEDES.

SUPPORTED LEDES FORMATS

LEDES™ (Legal Electronic Data Exchange Standard) is an open standard for the electronic exchange of billing and other information between corporations and law firms. LEDES ebilling standards are globally recognized and accepted as industry-specific electronic data interchange standards for the exchange of legal ebilling information. Legal Tracker supports the following LEDES formats:

- LEDES 1998B
- LEDES 1998BI (for international invoices or invoices that include tax)
- LEDES XML 2.1

Although Tracker does not require you to post invoices in the LEDES format, some companies request that their firms generate and post invoices using a LEDES format.

Tracker does not provide support for time and billing systems. If you need help with generating a LEDES-formatted invoice, contact your time and billing vendor.

POSTING INVOICES

Firms can post invoices in Tracker in any format (for example, LEDES, non-LEDES, paper, or electronic) that the company accepts. Companies can set specific invoice currency or format requirements that determine what users see on the Post invoice page. For example, if a company has configured Tracker to require that your firm or office submit only LEDES invoices, the ability to post other formats will be disabled. Likewise, if a company configured Tracker to require that your firm or office submit invoices in specific currencies, you can select only those currencies.

If you are posting a LEDES-formatted invoice, you have the option of posting invoices one at a time or posting multiple invoices at once using SpeedPost. If you are posting a non-LEDES-formatted invoice, you can only post one invoice at a time.

Posting Speedpost Invoices

Tracker SpeedPost allows you to post multiple LEDES-formatted invoices at once. To use SpeedPost, the invoice must be in the LEDES format.

To post a Speedpost invoice:

1. Click **Billing** in the left navigation.
2. Click **Post invoices**.
3. Select **LEDES SPEEDPOST UPLOAD**.
4. In the **Law Firm Office** drop-down list, select the office the invoice was generated from.
5. Select the invoice currency from the Invoice currency drop-down list.
   - All LEDES 1998B invoices will be posted in the currency you select in this field.
   - If you need to post 1998B invoices in different currencies, you must manually post each invoice and select the applicable currency for each.
   - If you are uploading LEDES 1998BI invoices, the currency indicated in the invoice file will overwrite any currency you specify here.
6. If you have a receipt or other supporting file that you want to attach to the invoice, click **Browse** next to **Supporting documents**. On your computer, locate and select the file to attach.
7. Click **Post invoices** in the toolbar.

Posting Non-LEDES Invoices

To post a non-LEDES invoice:

1. Select **Billing** in the left navigation.
2. Select **Post invoices** in the toolbar.
3. Select **OTHER FILE UPLOAD** to select the invoice format and method for posting the invoice.
4. Click **Post invoice** next to the matter you want to post an invoice for.
5. Complete the fields on the new invoice page. Fields with an asterisk are required.

You must include a PDF invoice with non-LEDES invoices. Select **Browse** next to **PDF**. On your computer, locate and select the PDF document to attach.

6. Click **Post & close** in the toolbar.

INVOICE DELIVERY ON HOLD

If you post an invoice to a matter that has incomplete tasks, Tracker uploads and saves the invoice, but it is not delivered to the client until all the incomplete tasks for the matter are resolved.

When an invoice for a matter with incomplete tasks is uploaded, Tracker saves the invoice and assigns a status of **Delivery on Hold**. This feature enables companies to enforce the completion of assigned tasks while allowing billing clerks to complete their billing responsibilities. The invoice is delivered to the client after all of the incomplete tasks for the matter are resolved.

If an invoice has a status of **Delivery on Hold** for more than 45 days, Tracker automatically rejects the invoice back to the firm.

View Delivery on Hold Invoices

To view all **Delivery on Hold** invoices:

1. Click **Billing** in the left navigation.
2. Click **View invoices**. You may need to complete this step if **Accruals** displays because unbilled amounts are due.

   Any invoice for a matter that has incomplete tasks associated with it is listed under the **INVOICES ON HOLD** collapsible section.
3. Click **View incomplete tasks** if you want to view detailed information (including the responsible parties) about the tasks.

   The posting date displays as **TBD** and the days pending displays as **N/A** because the invoice has not yet been submitted to the company for review.

REVIEW POSTED INVOICES

To track the progress of a pending invoice:

1. Click **Billing** in the left navigation.
2. If it is not already selected, click the **View invoices** tab. This tab shows all pending invoices, invoices that were approved in the past 30 days and invoices that were rejected in the past 180 days.
3. To view more information for a specific invoice, click the invoice number to open the invoice. This view shows information such as approval history, rejection comments, and remittance address.

REPOSTING INVOICES

Clients can reject or dispute an invoice when they believe there is an issue with the invoice. A client may reject an invoice for any number of reasons. For example:

- An invoice was posted to the wrong matter.
- The invoice is a duplicate.
- The invoice's content is incorrect.

You can repost an invoice to the same matter or post a rejected invoice to a different matter with or without changing the invoice, and you can use the same invoice number. For example, you may need to repost an unchanged invoice to the same matter if your client notifies you that they accidentally rejected a correct invoice.

> You cannot repost an invoice that was rejected more than 180 days ago. After 180 days, you need to submit a new invoice.

Repost an Invoice Without Changing the Matter

1. Complete one of the following to access the rejected invoice:
   - From your homepage Action Items, click **Review** in the **Invoice Alert** column for your Matter Action Items.
   - Access the matter associated with the rejected invoice then click **Invoices**.
   - Click **Billing** in the left navigation then click **View invoices**. Select **All Invoices (pending & past 30 days)** or **Rejected Invoices (past 180 days)** from the view selector then click **Change view**.
2. Click the invoice number for the rejected invoice.
3. Click **Repost** in the toolbar.

4. Make the necessary changes to the invoice and/or supporting documents. You do not need to attach a new LEDES or non-LEDES invoice if you are changing only the invoice profile information.

5. Click **Save & close** in the toolbar.

Repost a Rejected Invoice to a Different Matter

1. Complete one of the following to access the rejected invoice:

   - From your homepage Action Items, click **Review** in the **Invoice Alert** column for your Matter Action Items.

   - Access the matter associated with the rejected invoice then click **Invoices**.

   - Click **Billing** in the left navigation then click **View invoices**. Select **All Invoices (pending & past 30 days)** or **Rejected Invoices (past 180 days)** from the view selector then click **Change view**.

2. Click the invoice number for the rejected invoice.

3. Click **Repost** in the toolbar.

4. Click **Change matter** for the **Matter Name** field.

5. Complete one of the following:

   - If you know the name of the matter you want to repost the invoice to, enter it the invoice to in the **Matter name** field then click **Generate list**.

   - If you do not know the name of the matter you want to repost the invoice to, search for the matter using **Field to search** and **Field** then click **Generate list**.

6. Click **Select** for the matter you want to repost the invoice to.

7. Make the necessary changes to the invoice and/or supporting documents. If you do not need to change the actual invoice attachment, then you do not need to attach a new LEDES or non-LEDES invoice but a confirmation message displays.

8. Click **Save & close** in the toolbar.

Repost a Disputed Invoice

You can repost a disputed invoice with the same invoice number and with or without changing the invoice. You cannot repost a disputed invoice to a different matter.

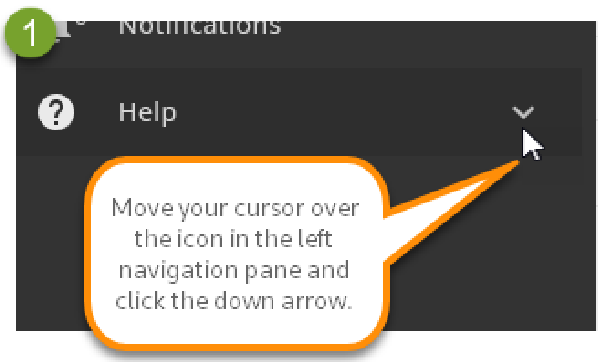
To repost a disputed invoice with no changes:

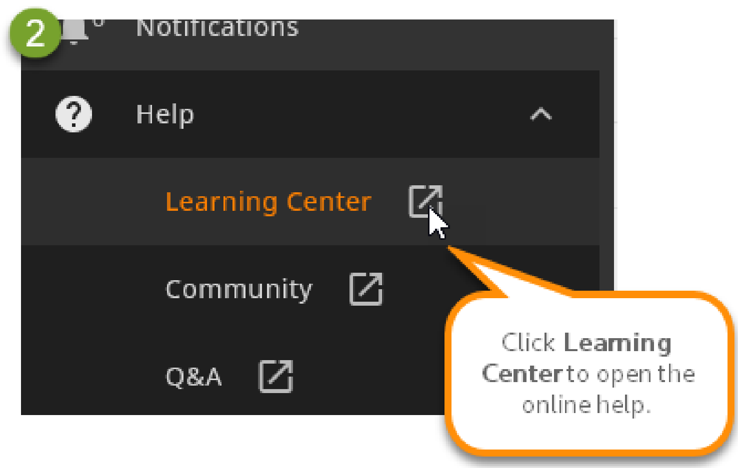
1. Complete one of the following to access the disputed invoice:
   - From your homepage Action Items, click **Review** in the **Invoice Alert** column for your Matter Action Items.
   - Access the matter associated with the disputed invoice then click **Invoices**.
   - Click **Billing** in the left navigation then click the **View invoices** tab. If necessary, use the view selector then click **Change view** to limit the number of invoices displayed.
2. Click the invoice number for the disputed invoice.
3. Click **Repost** in the toolbar.
4. Ensure **No** is selected for **Attach new invoice**.
5. If necessary, attach new supporting documents.
6. Enter your response to the client's concerns about the invoice in the **Reply to Dispute Comments** field. This field is required.
7. Click **Save & close** in the toolbar.

ADDITIONAL RESOURCES

ONLINE HELP

Comprehensive user documentation is available on the Tracker Help Center. To open help, scroll to the bottom of the left navigation pane. On the **Help** menu, select **Learning Center**.



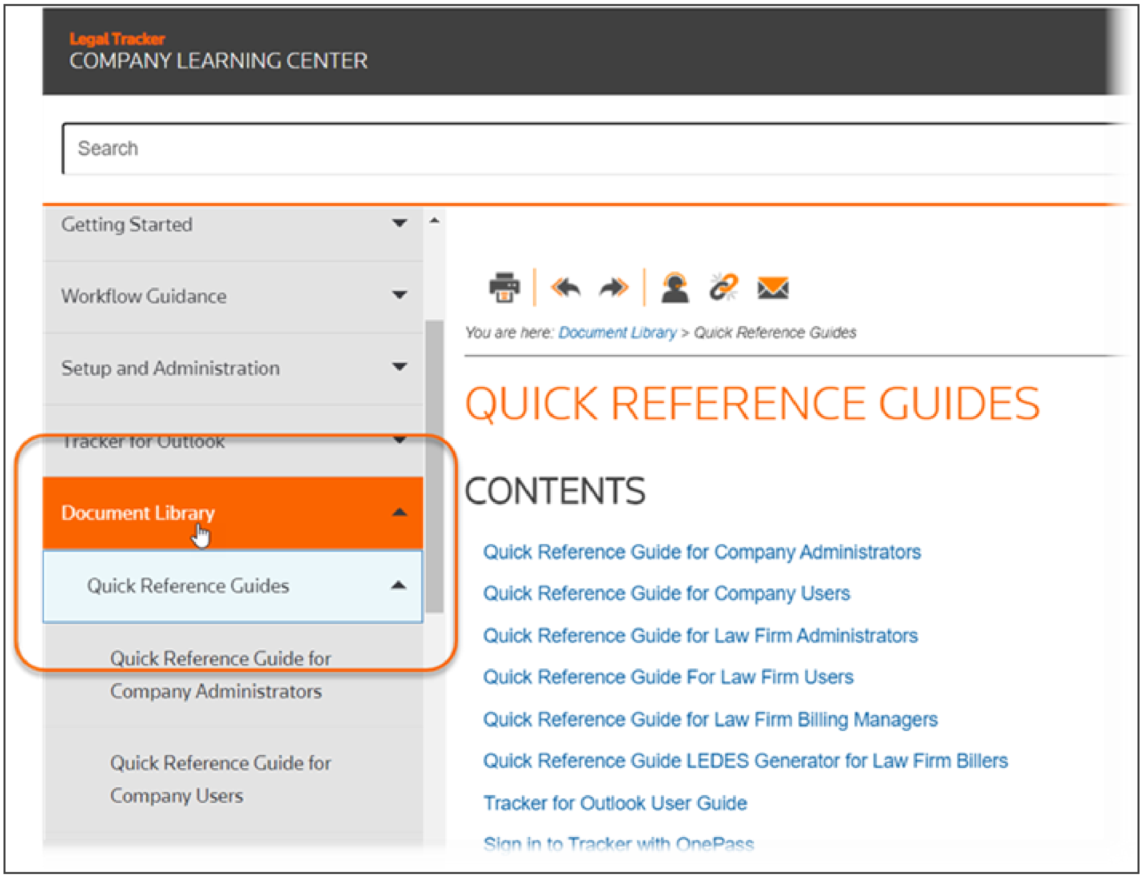


Online help has detailed step-by-step instructions on the tasks you perform in Tracker.

Additional page-specific help is available on selected pages in Tracker. When available, click **Page help** at the top of a Tracker page to access specific information for the page you are on.

DOCUMENT LIBRARY

The *Quick Reference Guide for Law Firm Billing Managers* and other guides are available in the Learning Center Document Library.



LEGAL TRACKER TUTORIAL VIDEOS AND WEBSEMINARS

The Legal Tracker video tutorials and Webseminars provide instructions and demonstrations for how to perform common tasks in Legal Tracker. Please visit our new Learning Management System at https://corp-legal-training.thomsonreuters.com/ for the current Legal Tracker Webseminars and eLearning.

If you are new to Legal Tracker Learning, click the **Register** button to request an account and get started.

For any questions about training and inquire about the All Access Training Passport, please send an email to legaltraining.corporates@thomsonreuters.com.