



# LedesAssist

## EffortlessLegal

## Summary

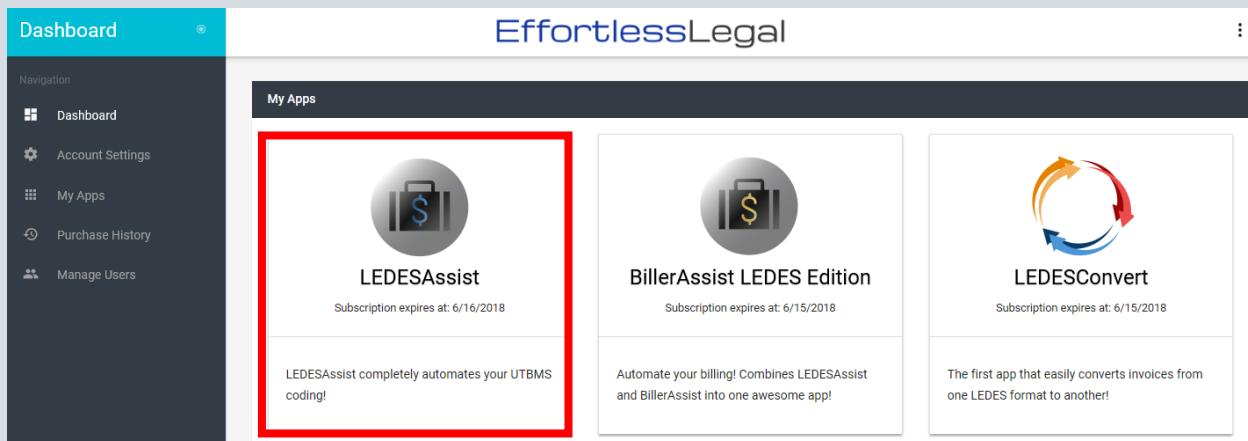
- Easily and automatically connects with your existing software.
- Automatically applies accurate LEDES/UTBMS codes as you bill.
- Local Counsel can easily add entries to their own billing.
- Adds features that will speed up your billing.
- Make your existing software smarter, easier and more accurate.
- Automatically applies UTBMS codes to time and expense entries.
- Learns and grows smarter from use, learns your unique billing needs.
- Enables users to invite Local Counsel to log time and expense entries for particular matters.
- Invite lawyers not with your firm (Local Counsel) to log time for your clients.
- Requires no installation.
- No need to migrate your data.
- Allows batch-processing to code an entire month of entries in just minutes
- Remembers approved billing and uses artificial intelligence to improve billing.
- Can be used stand alone, with any billing system and even proprietary billing systems.
- Can be customized for specific billing systems, even proprietary billing systems.
- Local Counsel users can enter time for multiple firms.

## Overview

- Clients/Matters
- Billing Entries
- Billing Rates
- Settings

## Where to Begin

LedesAssist is launched from the EffortlessLegal dashboard. To begin, you'll need to sign up with an account, and can then log in to the dashboard from the EffortlessLegal homepage. Input your credentials, and you will be directed to the dashboard as shown below. Select LedesAssist, or purchase the app if you have not done so already. If you would like to learn more on how to create an account with EffortlessLegal, [click here!](#)



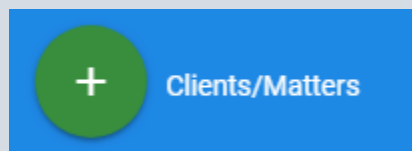
## Adding a Client/Matter to LedesAssist

In order to be able to create time/expense entries, a client and matter are needed. First, a client must be created, then a matter.

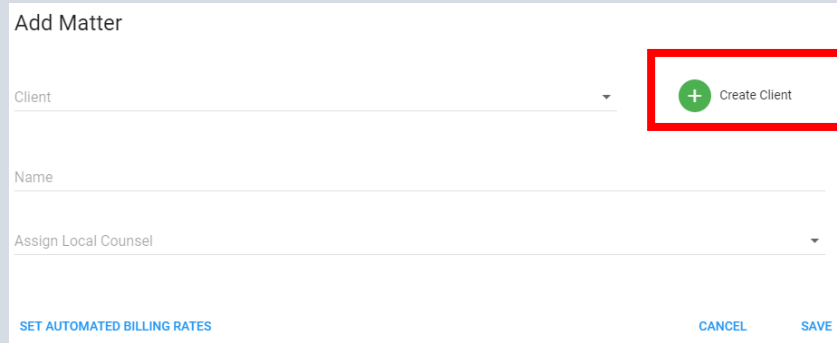
1. To add a client, click the "CLIENTS/MATTERS" tab on the navigation bar on the top right.



2. Click the large green "+" button on the top left. This will open the create matter window.

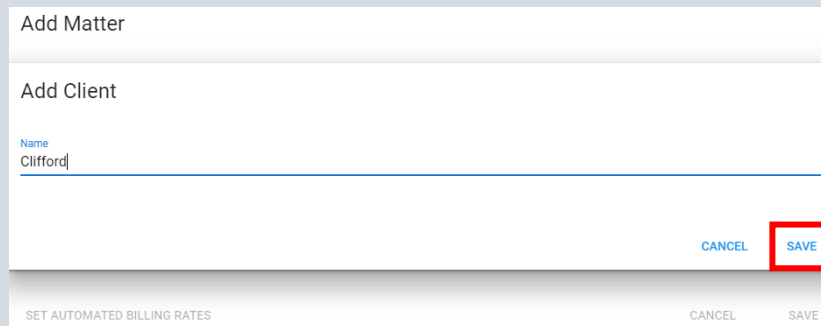


3. Clicking the plus sign will prompt a little window to pop up. Click the green “+” button again, this time on the top right. Another window will pop up.



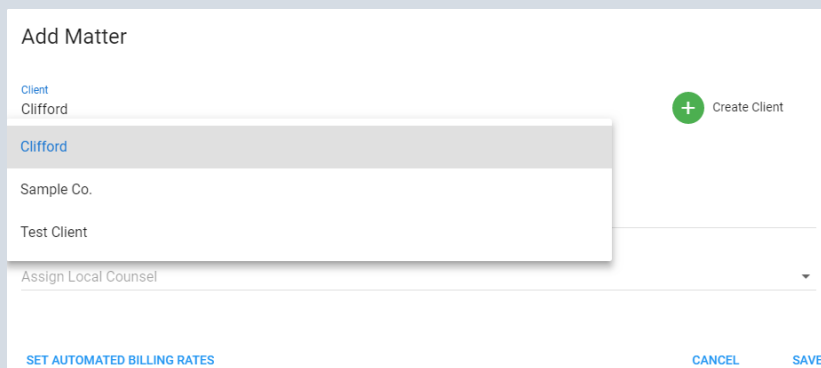
The screenshot shows the 'Add Matter' form. At the top right, there is a green circular button with a white plus sign and the text 'Create Client'. This button is highlighted with a red rectangular box. Below the button are three input fields: 'Client' (a dropdown menu), 'Name' (a text field), and 'Assign Local Counsel' (a dropdown menu). At the bottom of the form, there are three buttons: 'SET AUTOMATED BILLING RATES' on the left, and 'CANCEL' and 'SAVE' on the right.

Enter the name of the client here, then click “SAVE.” You can also assign automated billing rates as needed.



The screenshot shows the 'Add Client' form. The title is 'Add Client'. Below the title is a 'Name' label and a text input field containing the text 'Clifford'. At the bottom right of the form, there are two buttons: 'CANCEL' and 'SAVE'. The 'SAVE' button is highlighted with a red rectangular box. At the bottom of the form, there are three buttons: 'SET AUTOMATED BILLING RATES' on the left, and 'CANCEL' and 'SAVE' on the right.

4. Now that the Client has been created, it will autofill into the “Add Matter” popup seen previously. Now you can add the appropriate name to the matter that corresponds to the client. If you have other existing Clients, you can also select them in the dropdown menu.



The screenshot shows the 'Add Matter' form with a dropdown menu open. The dropdown menu is positioned over the 'Client' field and lists four options: 'Clifford', 'Sample Co.', and 'Test Client'. The 'Clifford' option is highlighted with a grey background. The 'Create Client' button is still visible in the top right corner. At the bottom of the form, there are three buttons: 'SET AUTOMATED BILLING RATES' on the left, and 'CANCEL' and 'SAVE' on the right.

In this example, we'll add a matter named "Martin" for our client Clifford. Then click "SAVE."

Add Matter

Client  
Clifford

Create Client

Name  
Martin

Assign Local Counsel

SET AUTOMATED BILLING RATES

CANCEL

SAVE

## Creating a Billing Entry using LedesAssist

Once "CLIENTS/MATTERS" have been created, you will see the top-right section where billing entries can be formed.

LedesAssist

BILLING ENTRIES CLIENTS/MATTERS BILLING RATES SETTINGS

Billing Entries Time entry 00:00:00 APPLY

Voice Billing SAVE + CLEAR SAVE + KEEP CANCEL

Date of Entry  
05/16/2018

Time (0 mins)

Timekeeper

Client

Matter

A-code A-Descr

T-code T-Descr

Description of Work

0 / 250

For "Billing Entries," the following fields must be filled out to complete an entry:

- Date of Entry
- Time
- Timekeeper
- Client
- Matter
- Description of Work

1. If the Billing Entries section is minimized, click the little “^” button in the top left corner.
2. Fill out the time and date, the date will automatically populate to today’s date. However, select “Date of Entry” if you wish to adjust the date for the billing entry.

The screenshot shows the top section of the Billing Entries form. A blue header bar contains the text "Billing Entries" with a caret icon, a toggle switch for "Time entry" (which is turned on), a timer icon showing "00:00:00", and an "APPLY" button. Below the header, the "Date of Entry" field is highlighted with a red box and contains the date "05/29/2018". To the right of this field is a "Time (0 mins)" input box. A calendar pop-up is visible, showing the month of May 2018 with the 29th selected. Other fields like "Client", "Matter", and "Description" are partially visible but not the focus.

3. Select whether the entry is a “Time Entry” or “Expense Entry” using the toggle button on the left.

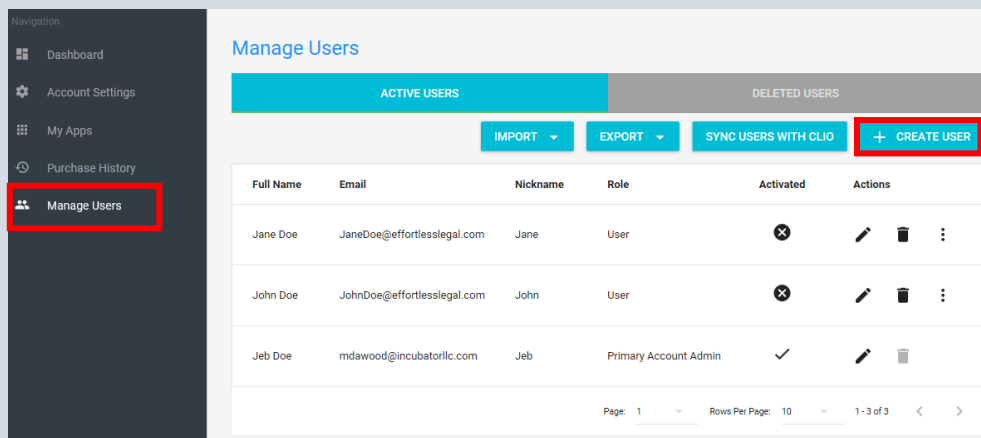
This screenshot shows the same Billing Entries form as above, but the "Time entry" toggle switch is highlighted with a red box. The date field now shows "04/27/2018". The "Time (0 mins)" field is also visible.

4. If you are entering a “Time Entry”, enter the time spent in “Time” input box. Time Spent is accepted in 0.1 increments (tenths of an hour).

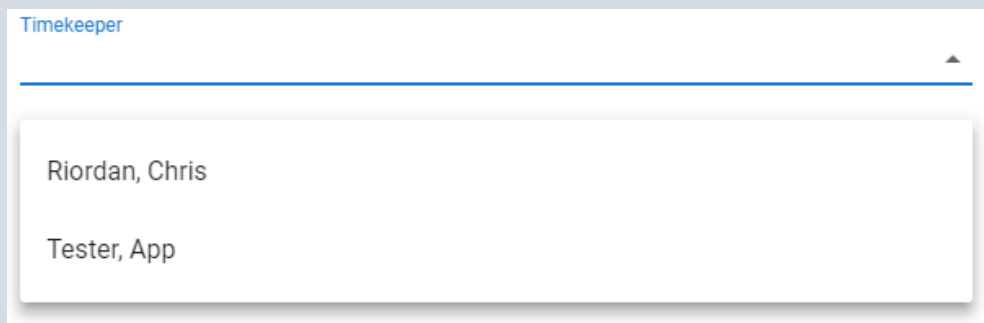
The top screenshot shows the "Time entry" toggle is on, and the "Time (0 mins)" input box is highlighted with a red box. The "APPLY" button is also highlighted with a red box. The date is "04/27/2018".

The bottom screenshot shows the "Expense entry" toggle is on, highlighted with a red box. Below the header, the "Date of Entry" is "04/27/2018". The "Unit Price" field is highlighted with a red box and contains "\$ 0". The "Quantity" field is also highlighted with a red box. The "TOTAL" field on the right contains "\$ 0".

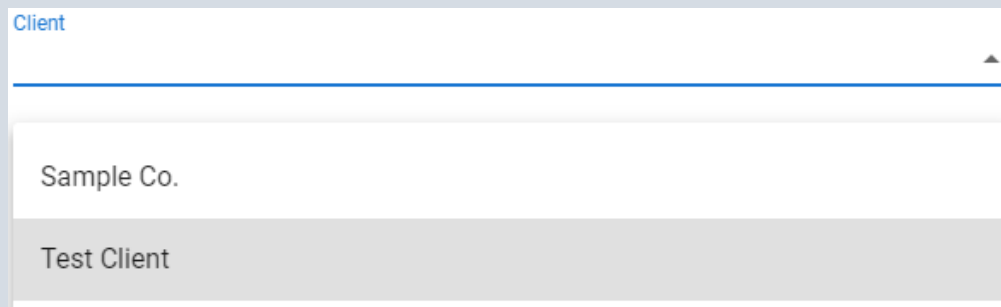
- The Time can be entered manually, or by using the timer on the top right of the Billing Entries Bar.
  - To use the timer, press the play button. When finished, you may click the pause button, and click “Apply,” and the time automatically populates in the input box.
5. To add a Timekeeper, go to the dashboard and select “Manage Users.” Select “CREATE USER” and enter the user’s information required to create a new User/Timekeeper. (Only the Account Admin can select anyone to be a Timekeeper)



6. Timekeepers or Local Counsel will be able to select their name once the Account Admin creates a User role.

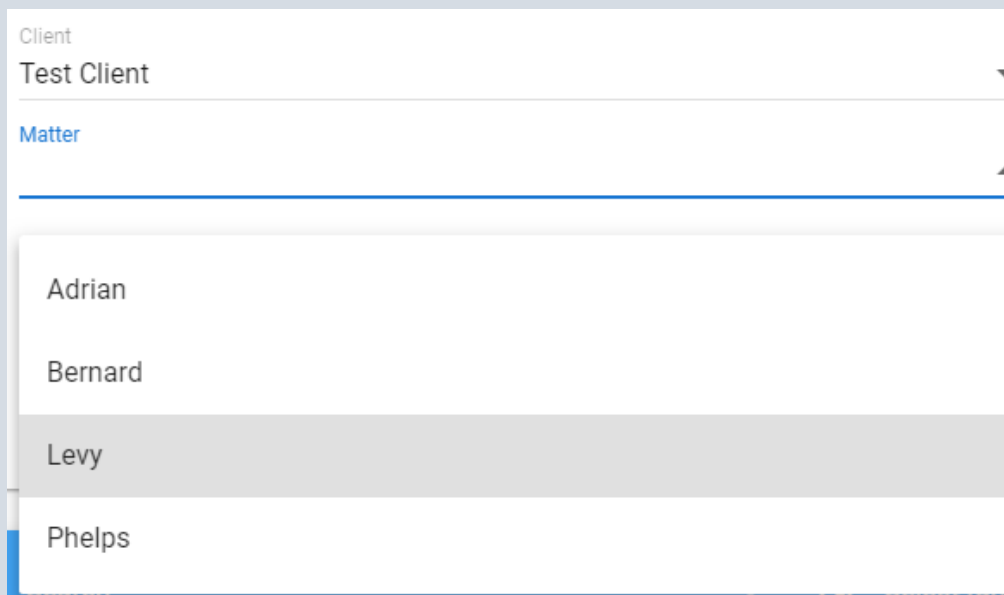


7. Select the client in the dropdown menu named "Client." In this example, we will select "Test Client."



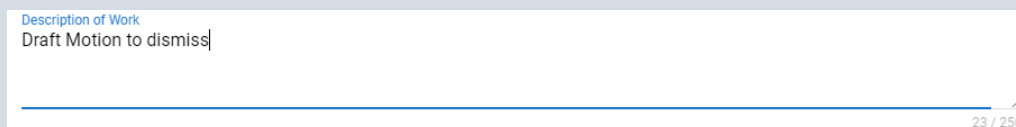
A screenshot of a dropdown menu. The label "Client" is at the top left. The menu is open, showing two options: "Sample Co." and "Test Client". The "Test Client" option is highlighted with a grey background.

8. Select the correct matter that you would like to bill the time for by selecting the name of the matter in the dropdown menu. In the example, we pick "Levy."



A screenshot of a dropdown menu. The label "Client" is at the top left, and "Test Client" is selected. Below it, the label "Matter" is at the top left. The menu is open, showing four options: "Adrian", "Bernard", "Levy", and "Phelps". The "Levy" option is highlighted with a grey background.

9. The last field is the Description of Work. Here you will type in a description of the work done for the matter in 250 characters or less.



A screenshot of a text input field. The label "Description of Work" is at the top left. The text "Draft Motion to dismiss" is entered in the field. At the bottom right, there is a character count "23 / 250".



10. Now that all fields are filled out, click “SAVE+CLEAR” or “SAVE+KEEP.” The “SAVE+CLEAR” button will save the entry down in the grid, but it will clear all fields in the entry form so that you can start billing for another matter.



Pressing “SAVE+KEEP” will also save to the entry section, except it will not clear the populated fields entered above. If you are billing for the same matter and all you want to change is the time and description of work, you don’t have to go through the other fields again, saving you time!

## Editing an Entry in LedesAssist

1. To edit an entry, simply go down to the grid section and find the matter you want to edit.

Date	Type	Amount	Time Keeper	Client	Matter	Description	A-Code	T-Code	
05/17/2018	Time	0.50 hrs (30 mins)	John Doe	Client 1	Matter One	Correspondence with client regarding interrogatories	A106	L390	
05/17/2018	Time	3.20 hrs (192 mins)	John Doe	Client Two	Matter 2	Draft motion to dismiss	A103	L240	
05/17/2018	Time	1.50 hrs (90 mins)	Jane Doe	Client Two	Matter 2	Analyze Complaint	A104	L210	
05/16/2018	Time	1.40 hrs (84 mins)	Jane Doe	Client 1	Matter One	Draft motion for summary judgement	A103	L240	

Then, press the Pencil button on the right side. Upon click, the entry will rise to the top of your screen.

2. The entry you wish to edit will appear in the entry section, and the box will have a red color. You can now edit, or even delete your entry from this box. To delete the entry, simply click the red button with the trashcan icon.

The screenshot shows the entry form with a red box around the trashcan icon in the top right corner. The form fields are as follows:

Billing Entries		Time entry	00:00:00	APPLY	Voice Billing	SAVE + CLEAR	SAVE + KEEP	CANCEL	
Date of Entry	05/29/2018	Time (30 mins)	0.50						
Client	John Doe								
Matter	Matter 1								
Description of Work	Draft motion for summary judgement.								
A-code	A103	A-Descr	Draft/Revise						
T-code	L240	T-Descr	Dispositive Motions						

3. When the edits have been made, simply click “SAVE+CLEAR,” or “SAVE+KEEP” to finalize your edits.

## Locking Entries in LedesAssist

Locking entries in LedesAssist means time entries billed can no longer be edited or deleted. This feature serves as a way to audit across other systems so that an account admin can view billing entries without added users or local counsel editing billing entries.



1. To lock Entries, go to “SETTINGS” on the top right of the browser page.

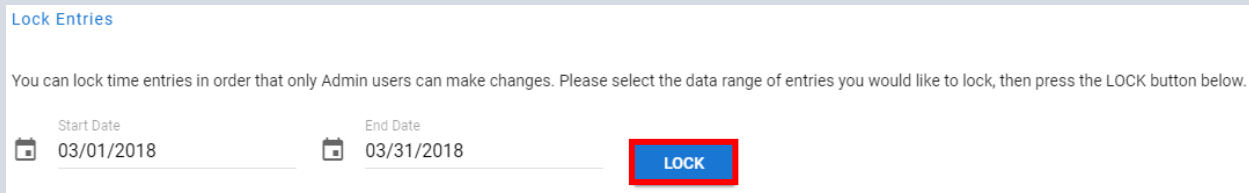


2. Click “LOCK ENTRIES” On the blue navigation bar
3. Enter a start and End Date for the time period you would like to lock in. Then press “LOCK” to lock the period of time selected.

Lock Entries

You can lock time entries in order that only Admin users can make changes. Please select the data range of entries you would like to lock, then press the LOCK button below.

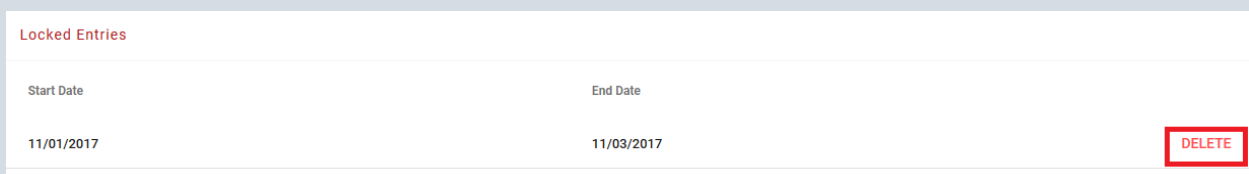
Start Date: 03/01/2018      End Date: 03/31/2018      **LOCK**



4. At the bottom there will be a “Locked Entries” section that will show what time periods have been locked in. Admin users can unlock the selected time period by pressing the red “DELETE” button on the bottom right.
5. When looking back at the grid, the entries that are locked will not be able to be deleted or edited. The pencil button will appear grey.






Locked Entries

Start Date	End Date	
11/01/2017	11/03/2017	<b>DELETE</b>



## Automated LEDES Coding

1. Once the entry has been saved it will appear below in the grid, where the appropriate LEDES/UTBMS code will be placed upon the entry. The A-Code and T-Code will appear on the right.

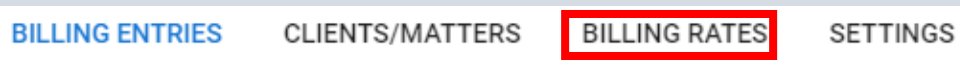
Description	A-Code	T-Code	
Shipping expense for documents to client	E124	L140	
Compile exhibits for motion of summary judgement	A103	L240	
Compile exhibits for motion of summary judgement	A103	L240	
Appear for hearing on motion.	A109	L450	
Draft and revise appearance.	A103	L140	

2. If LedesAssist assigns the codes incorrectly, you may edit the entry by clicking the blue pencil button on the right and change it to the correct entry. LedesAssist learns from the manual edits to better assign the correct code the next time using machine learning.

## Assigning Billing Rates

Clients and matters can also be assigned specific billing rates. These assigned billing rates can then be assigned to certain users. This way, the export data will show who is billing at what rate, how much a client is to be billed. To assign billing rates:

1. The billing rates first need to be set before users can be assigned. You can set rates by going to the billing rates tab on the top right menu.



2. Next, chose the client or matter you want to assign billing rates to. Let’s use the new matter we just created, Clifford/Martin. Click the pencil button on the far-right side.

Sample Co.	Osbourne	0	0	0	0	0	0	0	0	
Sample Co.	Jackson	0	0	0	0	0	0	0	0	
Sample Co.	Johnson	0	0	0	0	0	0	0	0	
Clifford	Martin	0	0	0	0	0	0	0	0	
Test Client	All matters	0	0	0	0	0	0	0	0	
Test Client	Bernard	0	0	0	0	0	0	0	0	

3. A window will appear to update the billing rates for the matter you select. Now you can input tiered billing rates as needed (For example, partners may bill more for their time than a senior counsel). Then click “SAVE,” to save the billing rate levels.

### Update Billing Rates

Client: Clifford - Matter: Martin

Rate Level 1 Rate Level 2 Rate Level 3 Rate Level 4

\$ 350 \$ 300 \$ 250 \$ 0

Rate Level 5 Rate Level 6

\$ 0 \$ 0

[CANCEL](#) [SAVE](#)

4. By clicking the blue people icon shown above, you can assign users to a selected rate level. Here we are assigning the user, “App Tester,” to Rate Level 2. Then, click “SAVE.”  
**NOTICE: Make sure to save the Billing Rate Levels before assigning users.**

### Update Billing Rates

#### Assign Users to: Rate Level 2

Assigned Users

Tester, App

[CANCEL](#) [SAVE](#)

criordan@mauricewutscher.com

[CANCEL](#) [SAVE](#)

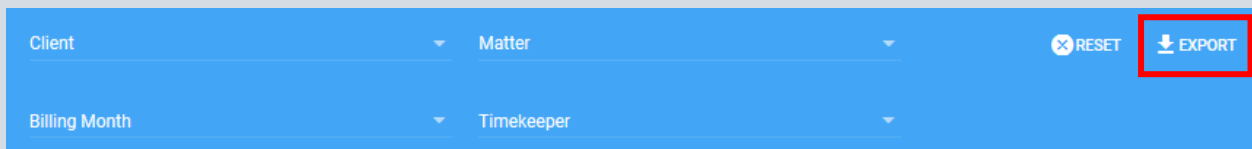
4. Now, whenever “App Tester” bills for this matter, BillerAssist LEDES Edition knows that the user will be billed at rate level 2, or \$300/hr. for Clifford/Martin. This information will not appear on the grid, but upon export, it can be seen that App Tester billed X number of hours doing work Y at a rate of \$300/hr.

## Exporting Data

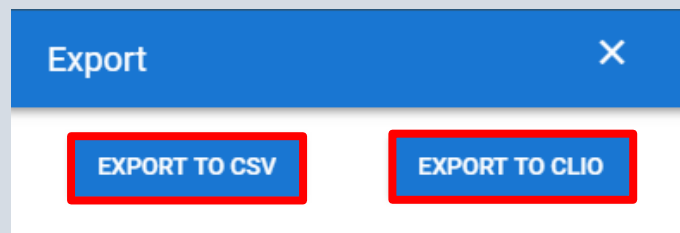
1. Select the range of data that you would like to export. This can be done using the search bar in the Grid by filling out the relevant fields to more easily narrow down the search.



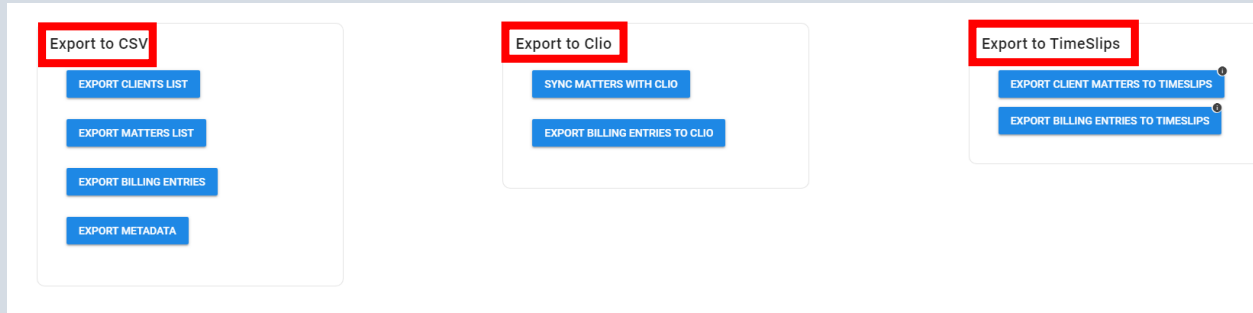
2. The fields will consist of the Search Bar, Billing Month, Start and End Dates, search by Timekeeper, Matter, and/or Client. This can be used to narrow your search. You can also filter entries by time entry or by expense. The results will appear below this search bar in the area called the Grid.
3. Once the appropriate data has been selected, simply click the “EXPORT” button on the right side of the Grid Search bar.



4. A lightbox will appear from the download. All items included within the parameters of the search in the grid will appear in the CSV file. Select “EXPORT TO CSV” to download an excel sheet containing any data being pulled, or export to Clio by selecting “EXPORT TO CLIO.”



5. Other data can be exported by clicking “SETTINGS” and then “EXPORT” on the left. You will see a menu of data that you can export, and whether you want to export the data to a CSV file, or a practice management software such as Clio or TimeSlips.



## Conclusion

LedesAssist eliminates the need for time-consuming and tedious LEDES/UTBMS coding, saving what you value most: time and money! LEDES coding is now completely automated and accurate.

- Precise automation – LEDES/UTBMS coding
- Keep your existing billing system
- Fast results
- Highly secure
- Local counsel users are free