SETUP GUIDE FOR VENDORS (Lawtrac/LT)

Steps to complete setup for new firms

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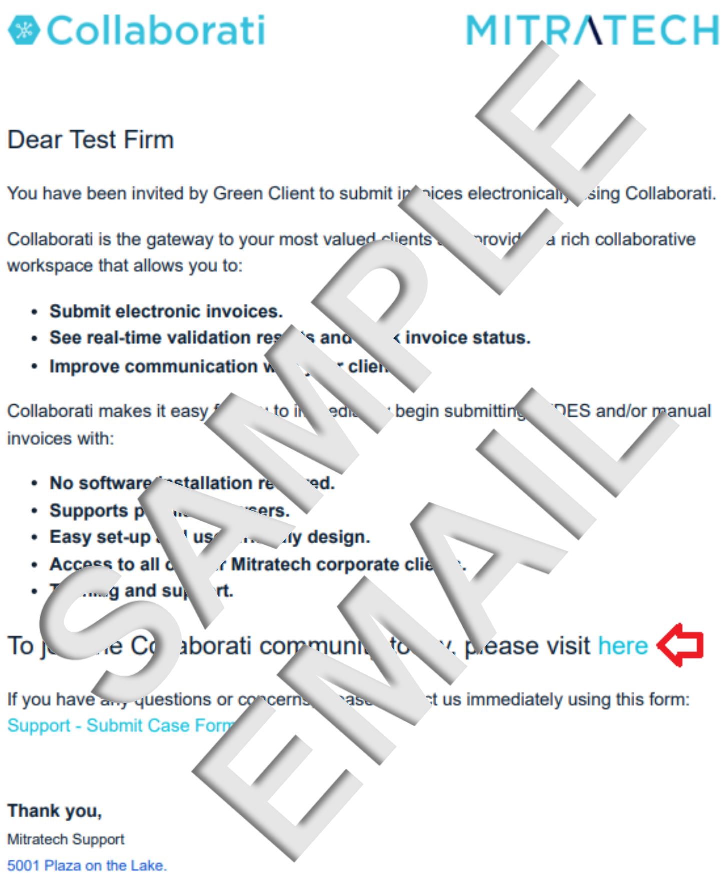
New Vendor/Firm Setup: Register

Once a firm is authorized by a client, a registration request email is automatically generated and sent to the vendor. An email will be sent with the subject “<client name> invites you to sign up for Collaborati e-billing”.


Collaborati MITRATECH

Dear Test Firm

You have been invited by Green Client to submit in[illegible]ices electronical[illegible]sing Collaborati.

Collaborati is the gateway to your most valued clients [illegible] provid[illegible] a rich collaborative workspace that allows you to:

- **Submit electronic invoices.**
- **See real-time validation res[illegible]s and [illegible]k invoice status.**
- **Improve communication w[illegible] clie[illegible]**

Collaborati makes it easy [illegible] to i[illegible]edi[illegible] begin submittin[illegible]DES and/or manual invoices with:

- **No software [illegible]stallation re[illegible]ed.**
- **Supports p[illegible]ers.**
- **Easy set-up [illegible] us[illegible]y design.**
- **Access to all [illegible] Mitratech corporate clie[illegible].**
- **T[illegible]g and su[illegible]rt.**

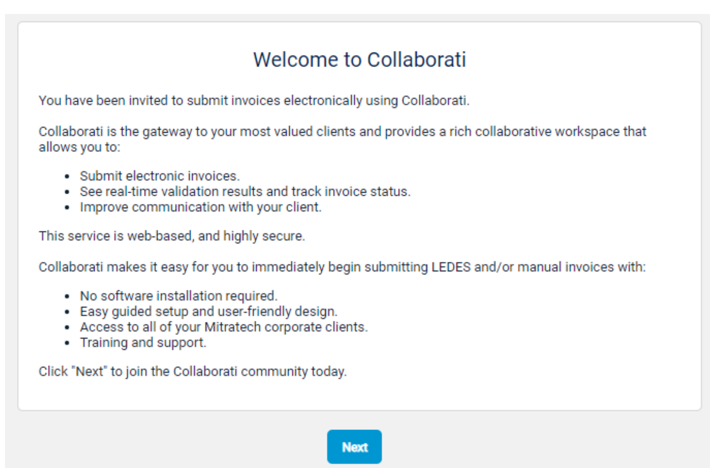
To j[illegible]e C[illegible]aborati communi[illegible] to[illegible] please visit here

If you have [illegible] questions or concerns [illegible] us immediately using this form: Support - Submit Case Form

Thank you,
Mitratech Support
5001 Plaza on the Lake.

SAMPLE EMAIL

Click on the link in the registration email to begin.


Welcome to Collaborati

You have been invited to submit invoices electronically using Collaborati.

Collaborati is the gateway to your most valued clients and provides a rich collaborative workspace that allows you to:

- Submit electronic invoices.
- See real-time validation results and track invoice status.
- Improve communication with your client.

This service is web-based, and highly secure.

Collaborati makes it easy for you to immediately begin submitting LEDES and/or manual invoices with:

- No software installation required.
- Easy guided setup and user-friendly design.
- Access to all of your Mitratech corporate clients.
- Training and support.

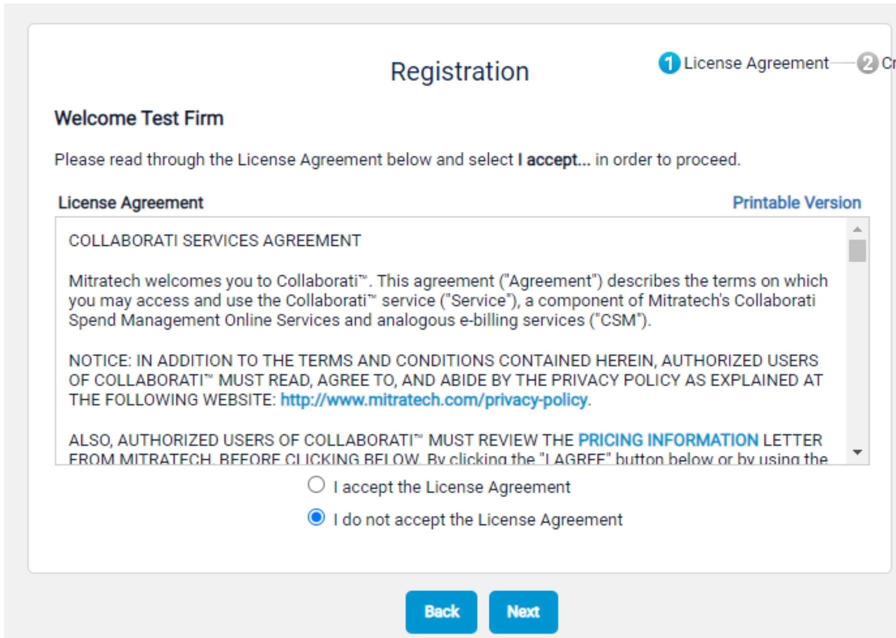
Click "Next" to join the Collaborati community today.

Next

Click on the **Next** button to continue.

License Agreement

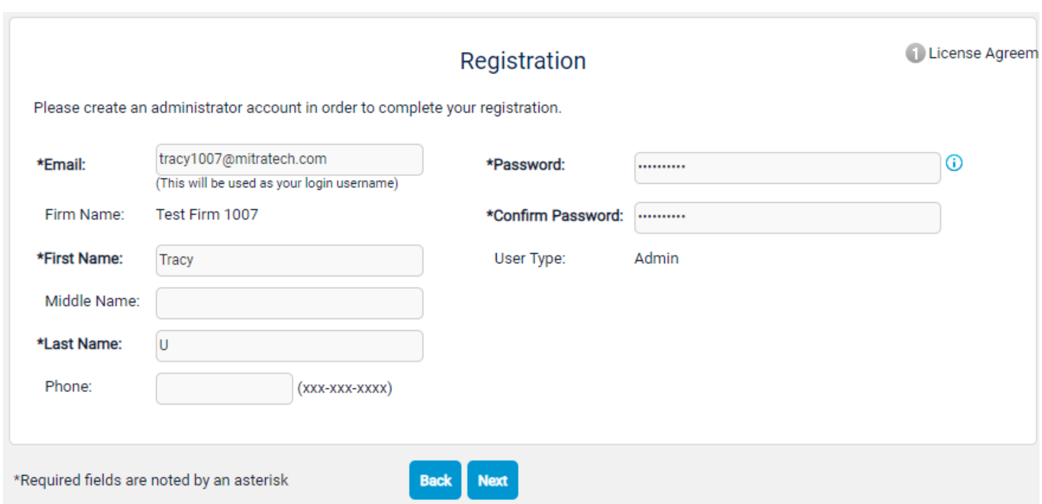
You will then be presented with the Collaborati End User Agreement. This must be accepted in order to be authorized to submit invoices to your client in Collaborati. Please scroll through and read the agreement.



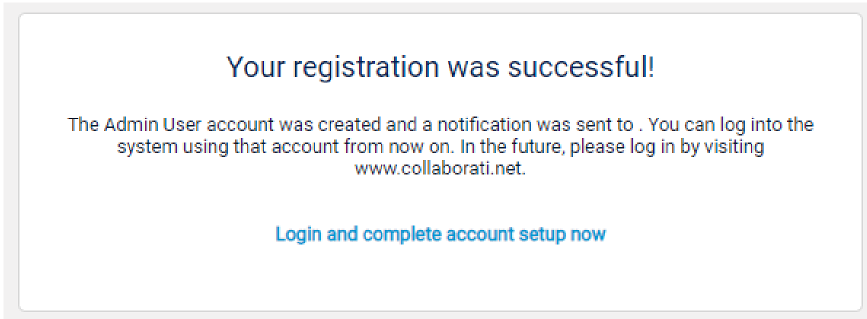
Please note: The vendor must agree with the Collaborati End User Agreement terms and conditions, otherwise access to Collaborati would be denied.

Click on the **Next** button to continue.

This will now lead you to the Registration page. You will enter your email address, name and password in this area to setup yourself as a user.



Once the **Next** button is clicked, the registration will be completed.

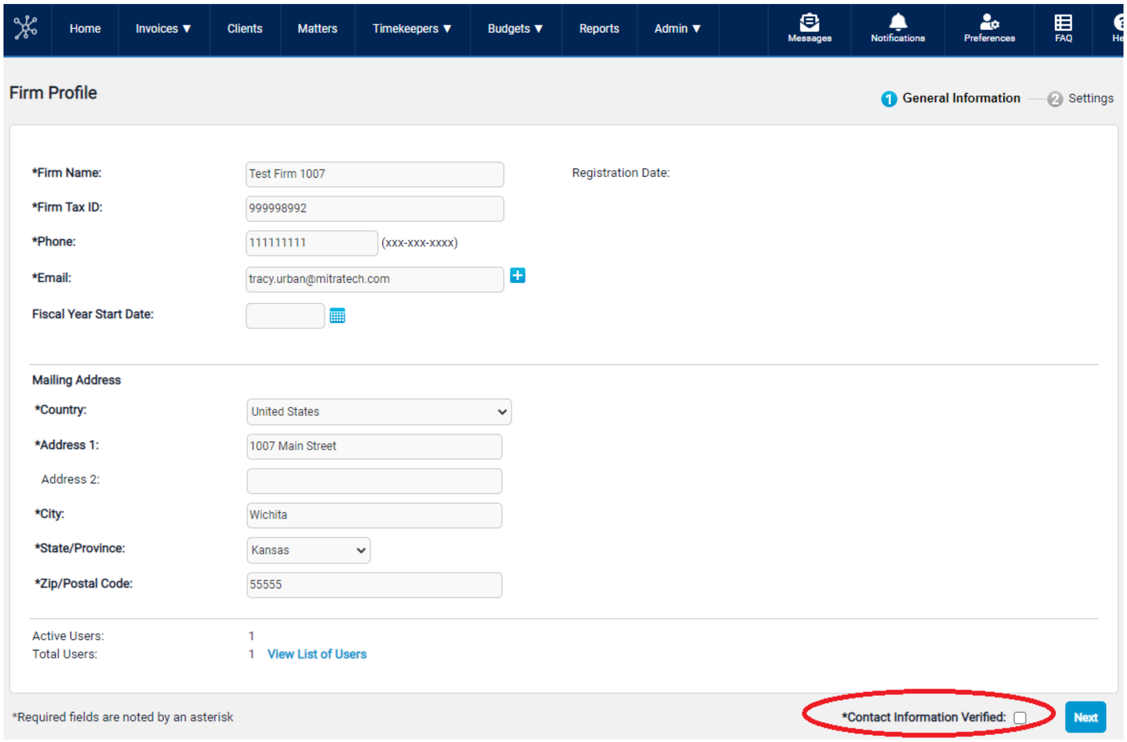


Click on the link **Login and complete account set up now**.

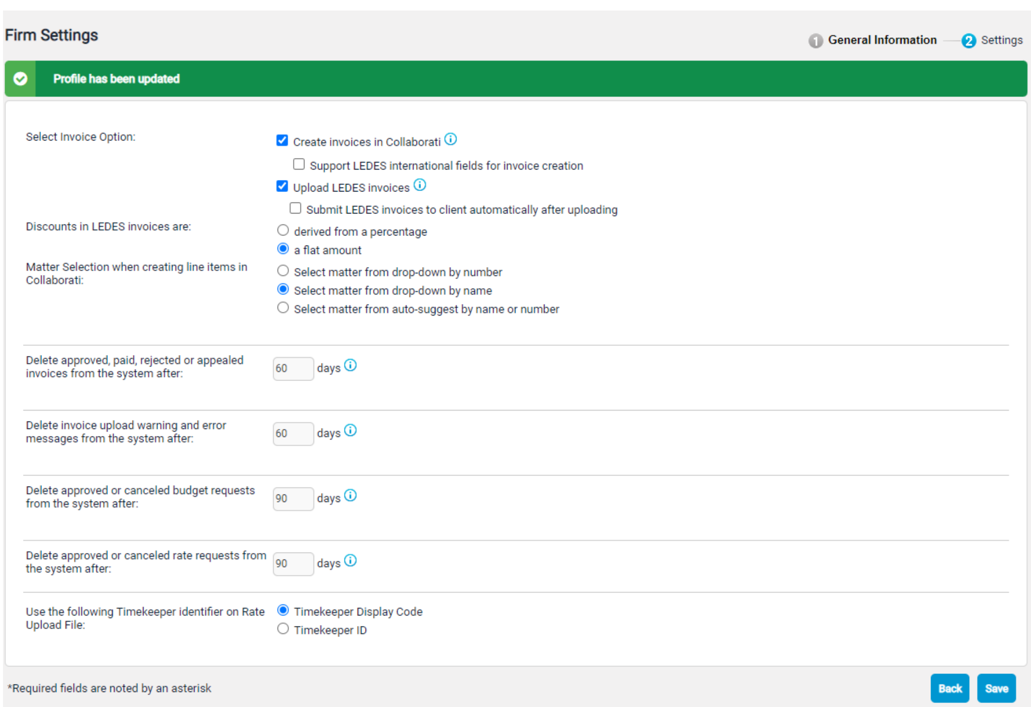
Enter your login credentials on the Login screen.

Verify Firm & Office Profiles and Settings

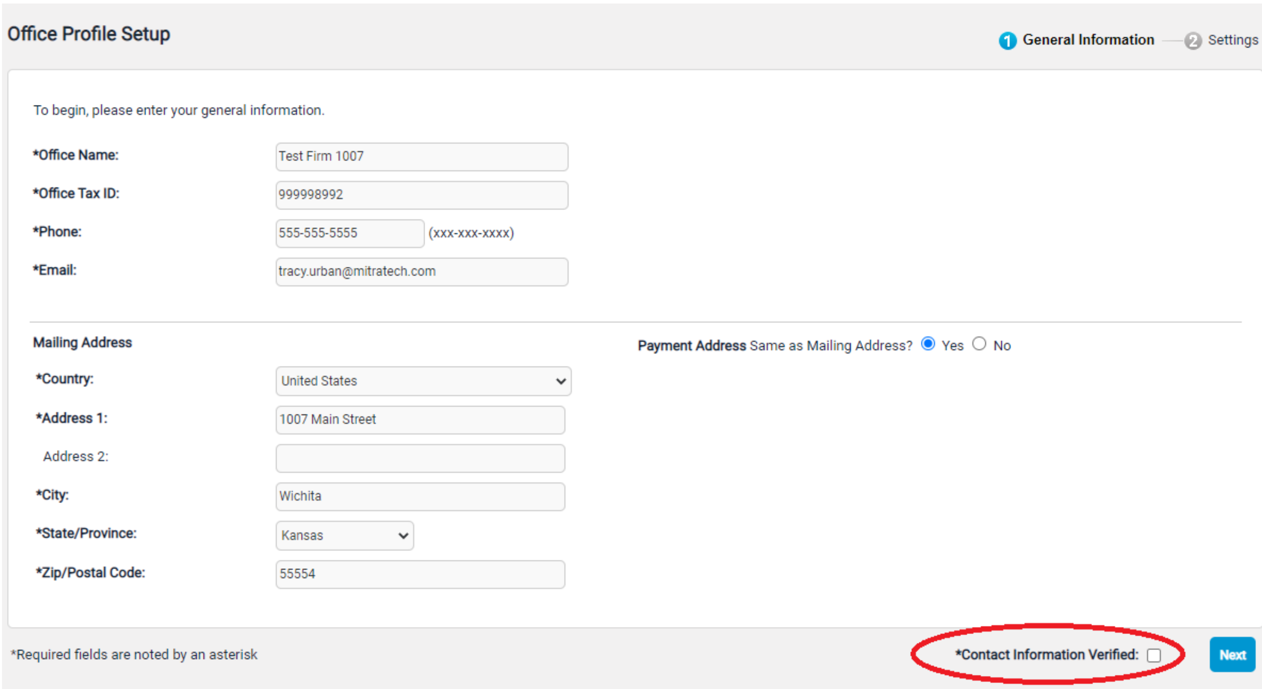
You will now see your **Firm's Profile** page, and after verifying everything is correct, check the box that says **Contact Information Verified** then click **Next**.



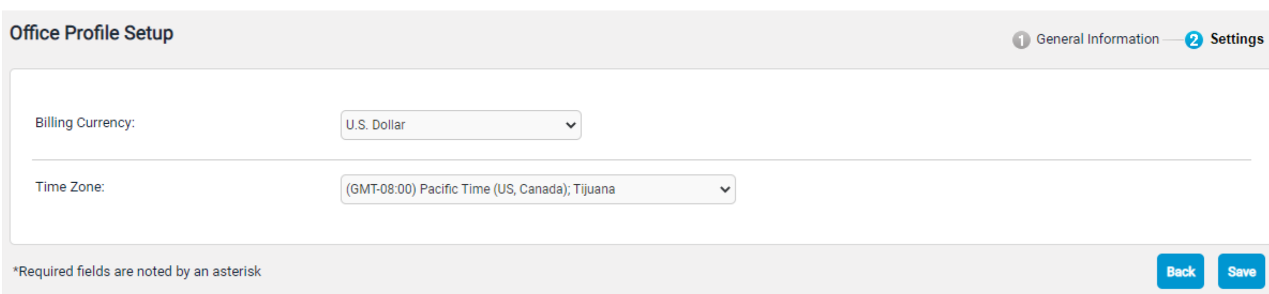
Review the Firm Settings and click **Save**.



You will now see your **Office's Profile** page, and after verifying everything is correct, check the box that says **Contact Information Verified** then click **Next**.

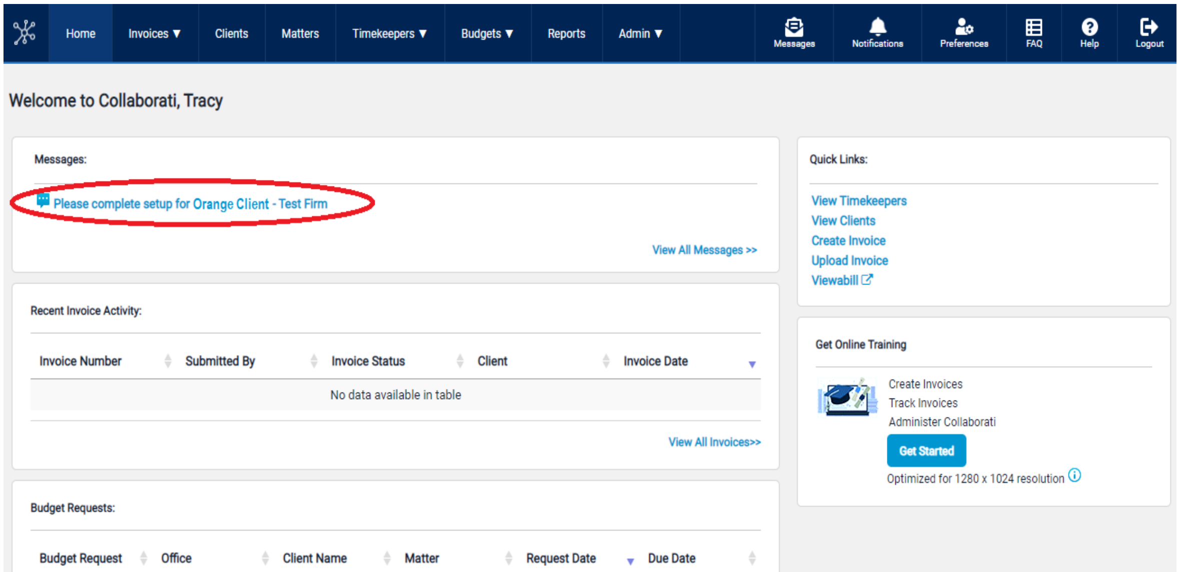


Review the Office Settings and click **Save**. Note: The Billing Currency defaults to "U.S. Dollar" and affects the currency on the Invoices and may affect Timekeeper Rate submission.



New Vendor: Client Setup (Existing Vendor Start Here)

Complete the Client Setup task by clicking the message “Please Complete Setup for <client>” link on the Collaborati Home page, in the **Messages** section



<u>Below are steps in completing a client set up</u>
Client setup involves reviewing your client's billing codes and Non-US Tax codes, and optionally associating your firms' codes equivalents, and adding/assigning timekeepers to the client record. There are 5 steps involved in setup:

1) Codes
2) review options to add or assign Timekeepers
3) Add/Assign Timekeepers
4) Add Timekeeper Rates (optional)
5) Summary review.

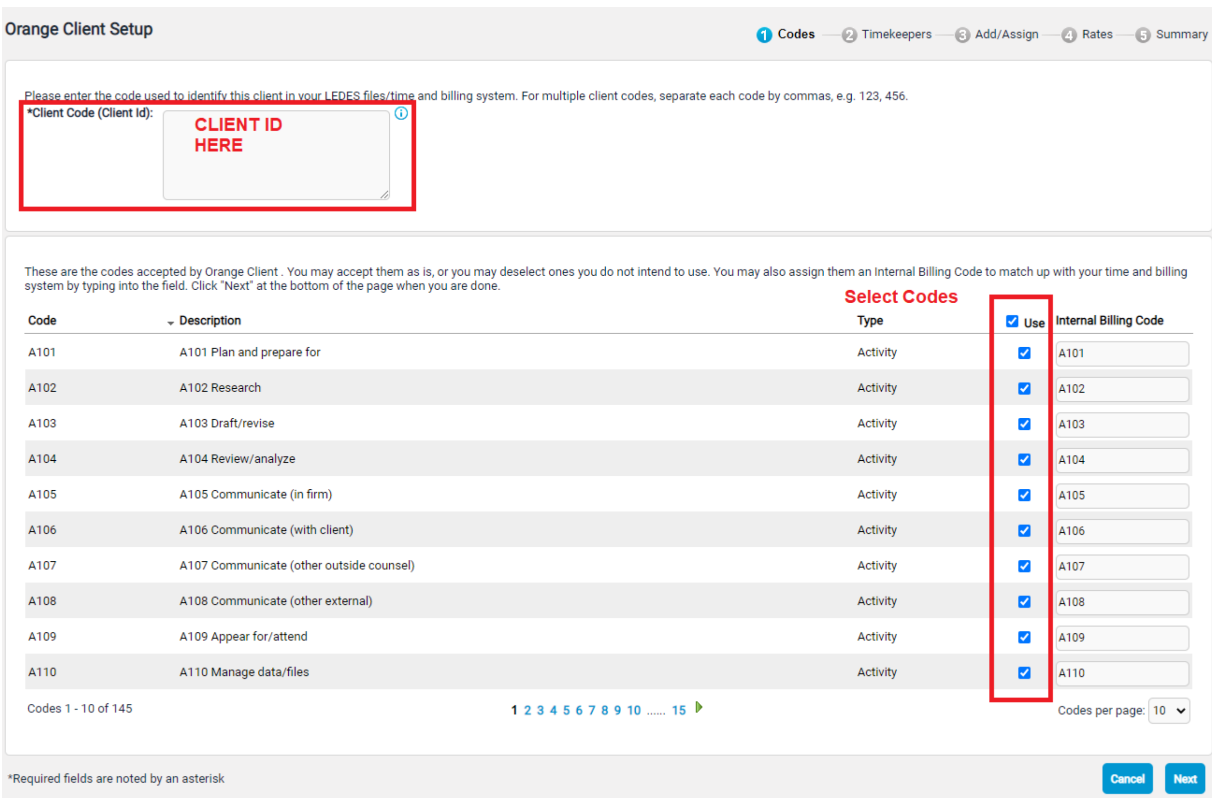
1 Codes

If your firm uses LEDES files:

1) If you choose to upload LEDES invoices, the application will ask you to enter a **Client Code (Client Id)** for this client. This is the Client Number assigned to your client in your Time and Billing Software. Enter one or more internal client codes (separated by a comma).
2) The application will display client-authorized Task (Fee), Expense and Activity billing codes on the screen (if applicable). Client-authorized Non-US Tax codes will also display.
3) If you are submitting LEDES invoices, your Time & Billing system may be using different codes. If this is the case, you can indicate your internal billing code equivalent for each applicable code, for each sub-set. By default, it is assumed that you use client codes in your invoices.

If your firm does not use LEDES files:

With regards to the setup, the **Client ID (Client Code)** refers to a Client number that may be assigned by your billing software. If you don't have one, simply type the name of your client. Leave all other codes checked for use. These are authorized by the client and should be selected for use.



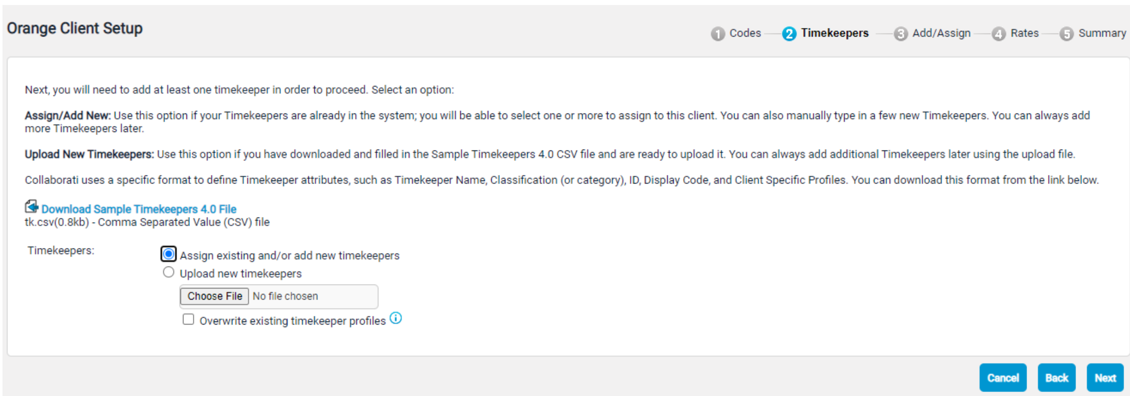
Click **Next**.

2 Timekeepers

Select how you will add or assign Timekeepers:

- by entering or assigning individual timekeepers to the client (**manually added**)
- by uploading a list of timekeepers (**uploaded**)

Your firm must have at least one timekeeper. This would be a person that provides the services to your client. The Display Code and Timekeeper ID can be the same value for a timekeeper, but no two timekeepers should share these values. If you don't already have Timekeeper IDs assigned, the best rule of thumb is to use a person's initials.



Decide whether to add rates

Once all timekeepers have been added manually or by uploading a file, choose one of these (step 4):

Submit the timekeeper information without rates for client authorization.

Add Timekeeper Rates to add timekeeper rates (recommended).

There are different types of Rate Requests and your client will usually prefer one of these.

Timekeeper rate - The rate for the timekeeper (usually the default rate).
Matter Level Rate - For a premium timekeeper rate which is matter specific (not needed for a rate that is lower than the default rate).

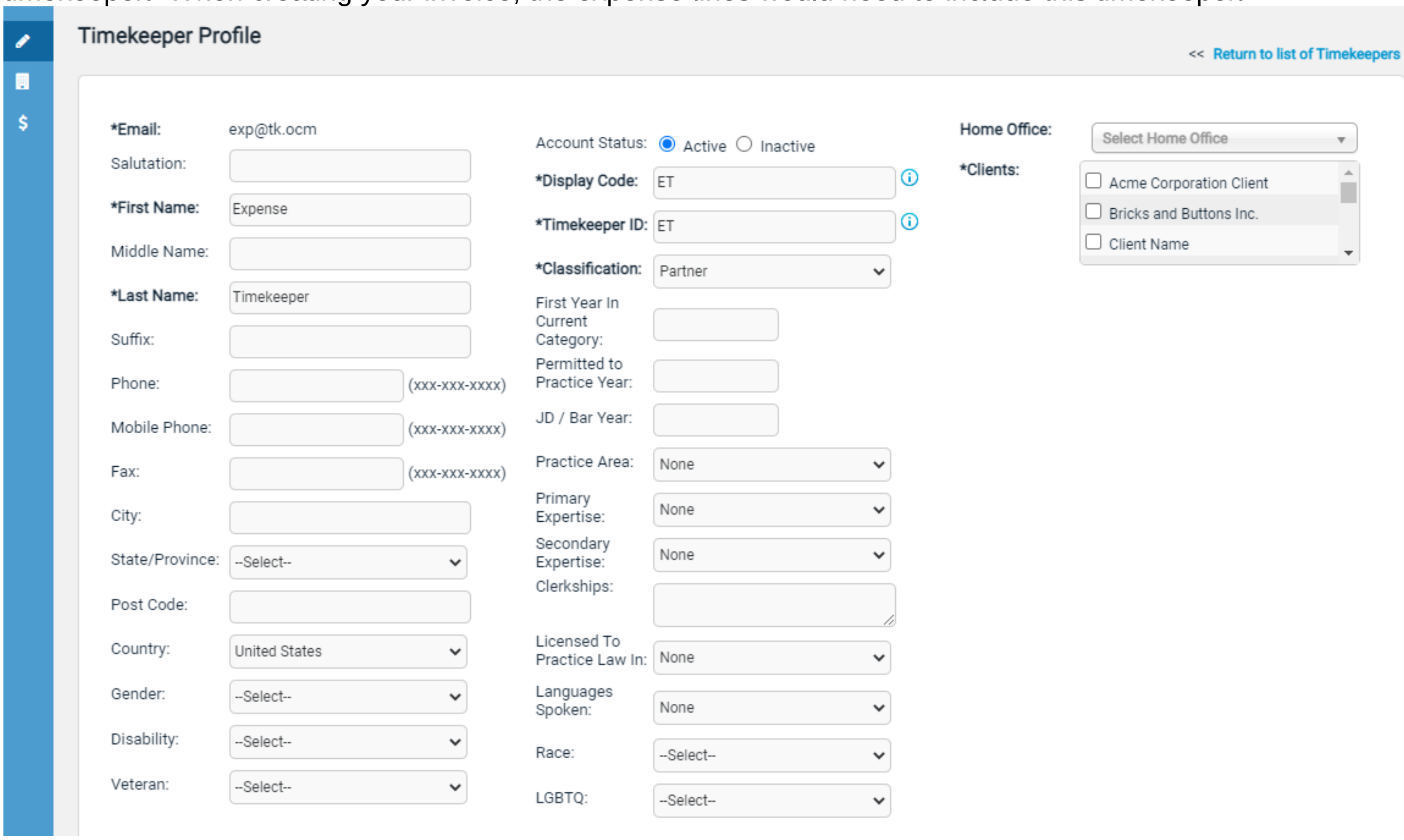
Please check with your client if you are unsure which type to use in your Rate Request.

Note: A warning message will be displayed stating that "any rate items entered on this page will be deleted if you switch your selection between Manually Timekeeper Rates and Upload Timekeeper Rates or vice versa."

Expense Timekeeper

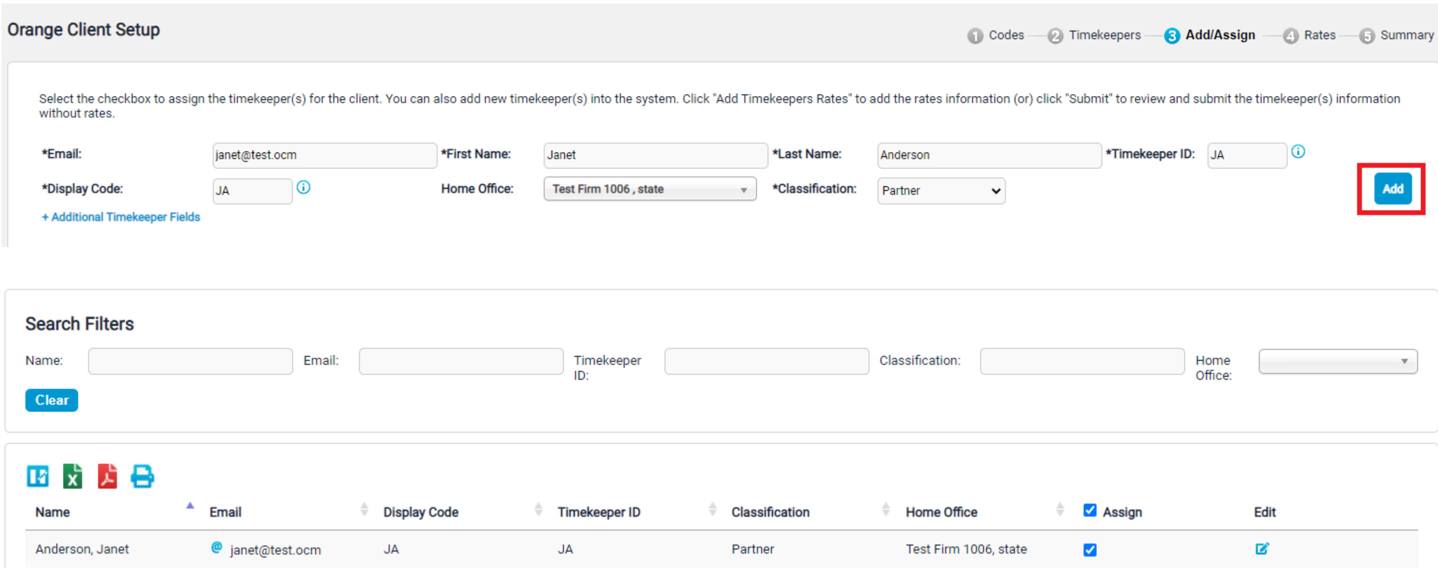
Expense line items require you to have an authorized Expense timekeeper with an approved Timekeeper rate.

Most firms have an Expense Timekeeper with a high rate (such as $1000 per hour). Here is a sample expense timekeeper. When creating your invoice, the expense lines would need to include this timekeeper.

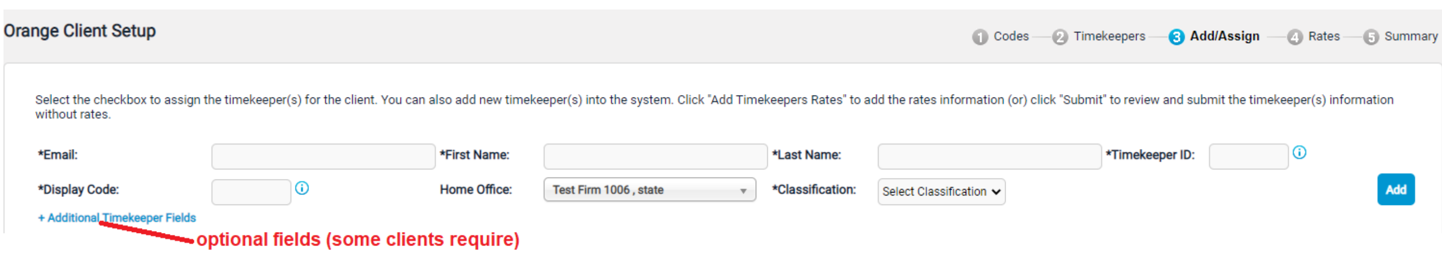


3A Add/Assign Timekeepers added manually

Choose **Assign existing and/or add new timekeepers** if you will enter individual timekeeper information one at a time. Only the highlighted fields are required. The **Home Office** should match the office that the timekeeper is most likely to work from. After you input timekeeper data, click the **Add** button.



Additional Timekeeper fields can be added (some clients may require these fields, refer to your client's billing guidelines for requirements).

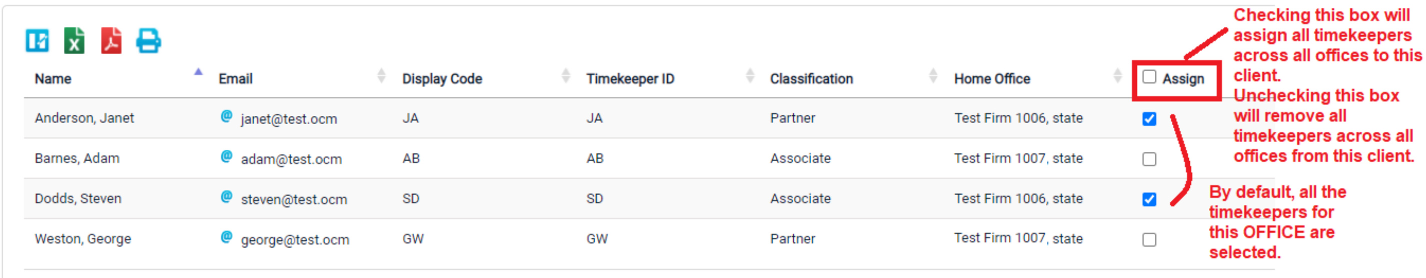


Using Timekeeper Global Assign/Unassign checkbox

Firms with multiple Offices:

If using the checkbox, note that *by default* all the Timekeepers belonging to the assigned Office for the new client are selected.

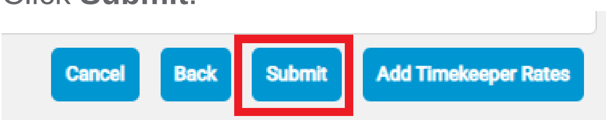
- Checking this box will assign all Timekeepers across all Offices to this client.
- Unchecking this box will remove all Timekeepers across all Offices from this client.



Submit Timekeepers (Manually Added without rates)

To submit the timekeeper information without rates for client authorization.

Click **Submit**.

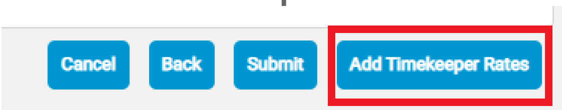


View the Summary without rates.

4A Add Timekeeper Rates (Manually Added with rates)

To add timekeeper rates to the timekeepers.

Click **Add Timekeeper Rates**.

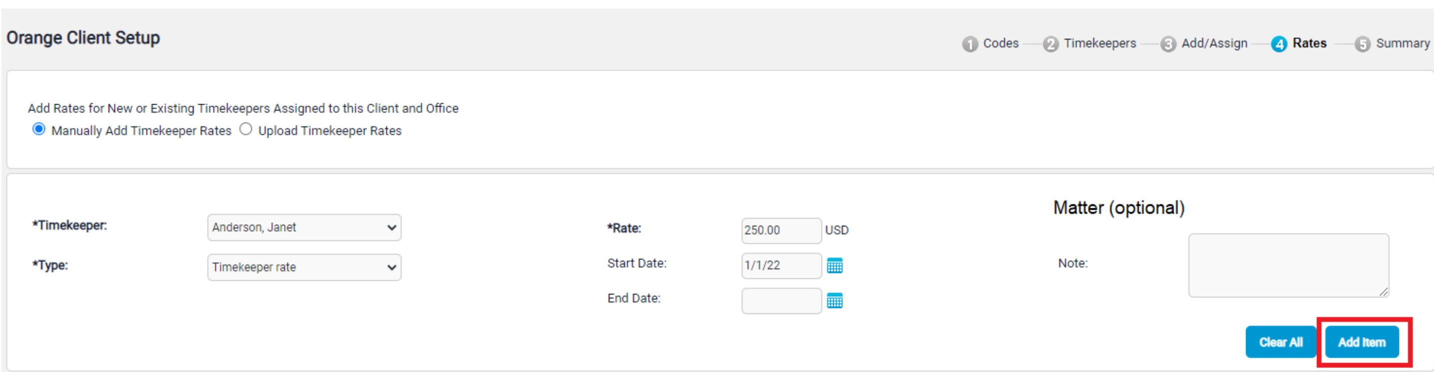


For each **Timekeeper** entry, enter the basic information about the timekeeper rate. One or more rates may be entered for each timekeeper.

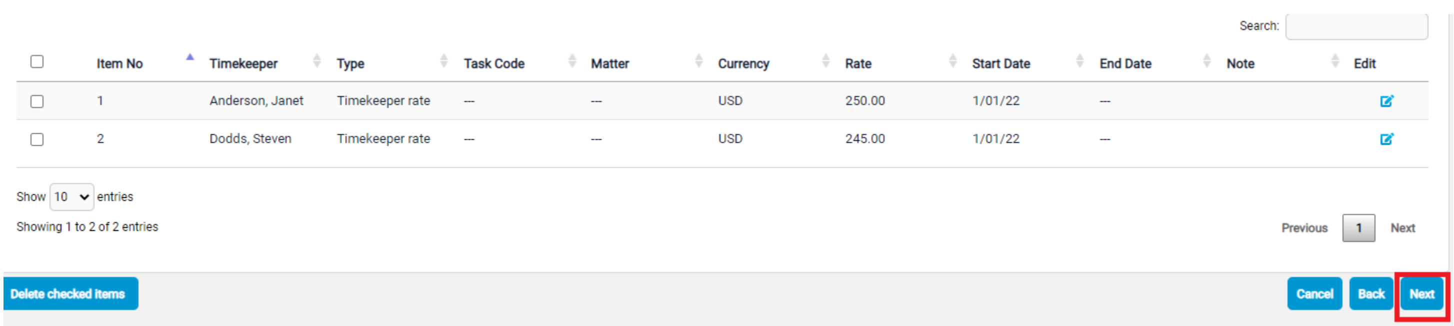
Type: Invoice Task Rate/Timekeeper Rate
Task Code: If the Type is “Invoice Task Rate”, enter the applicable Task Code
Rate: Enter the value.
Start Date: optional
End Date: optional
Matter: optional (available only if your client allows this option).
Note: optional

Click **Add Item** button.

Note: The Rate currency gets populated, based on the billing currency for the Office.



You can review all the rate items added on the preview screen at the bottom of the page.

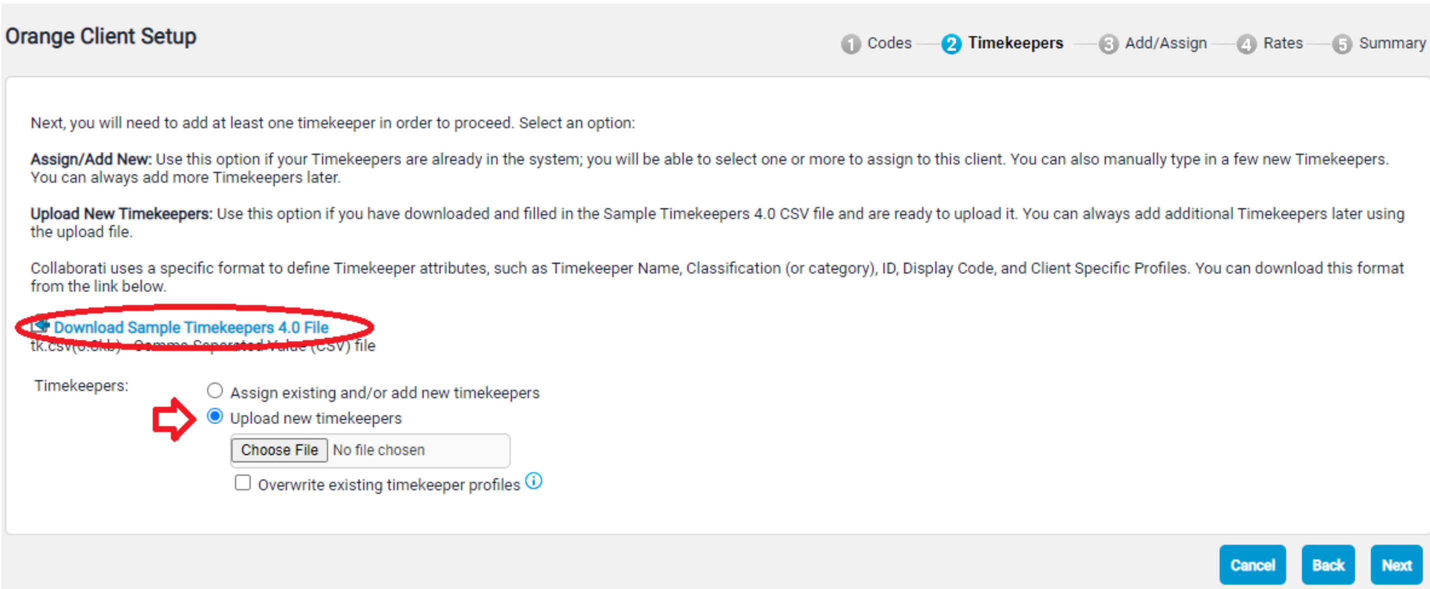


Click **Next**.

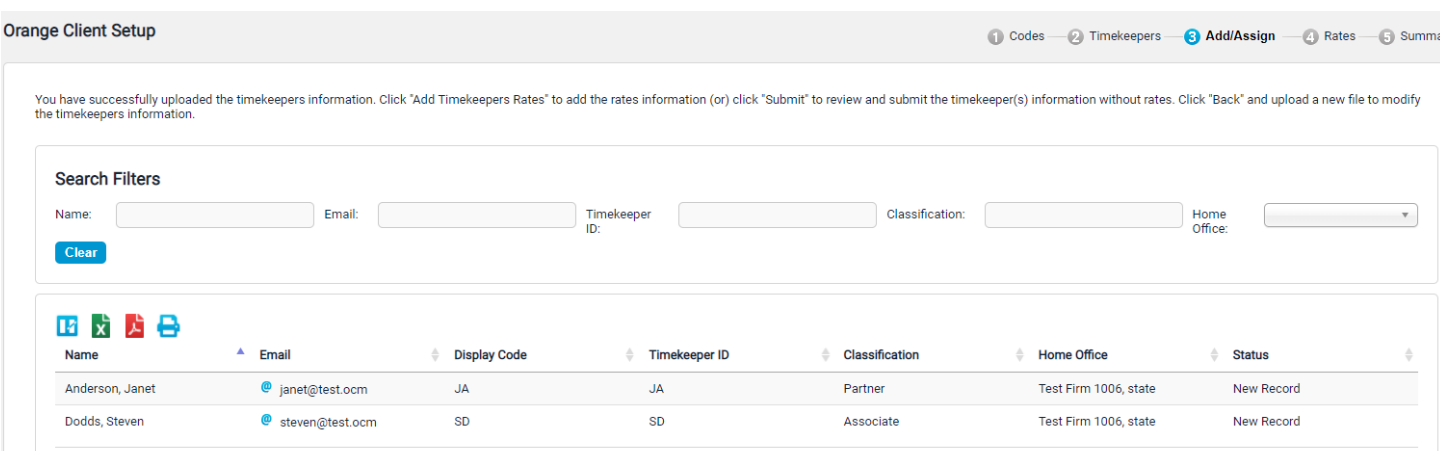
View the [Summary](#) with rates.

3B Add/Assign Timekeepers uploaded

Choose **Upload new timekeepers** if you do not assign or add timekeepers manually.
You will upload a file of many timekeepers at once. The sample file can be downloaded directly from this page. Once the file is ready, it can also be uploaded on the same page by clicking on Browse or Choose file button.



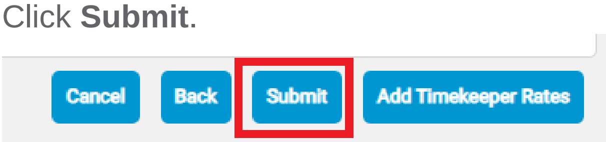
When ready to upload the file, click on the **Next** button and the file will be uploaded into Collaborati.



Submit Timekeepers (Uploaded without rates)

To submit the timekeeper information without rates for client authorization.

Click **Submit**.

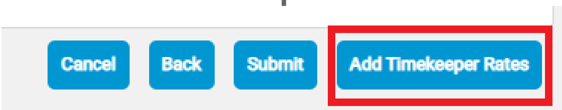


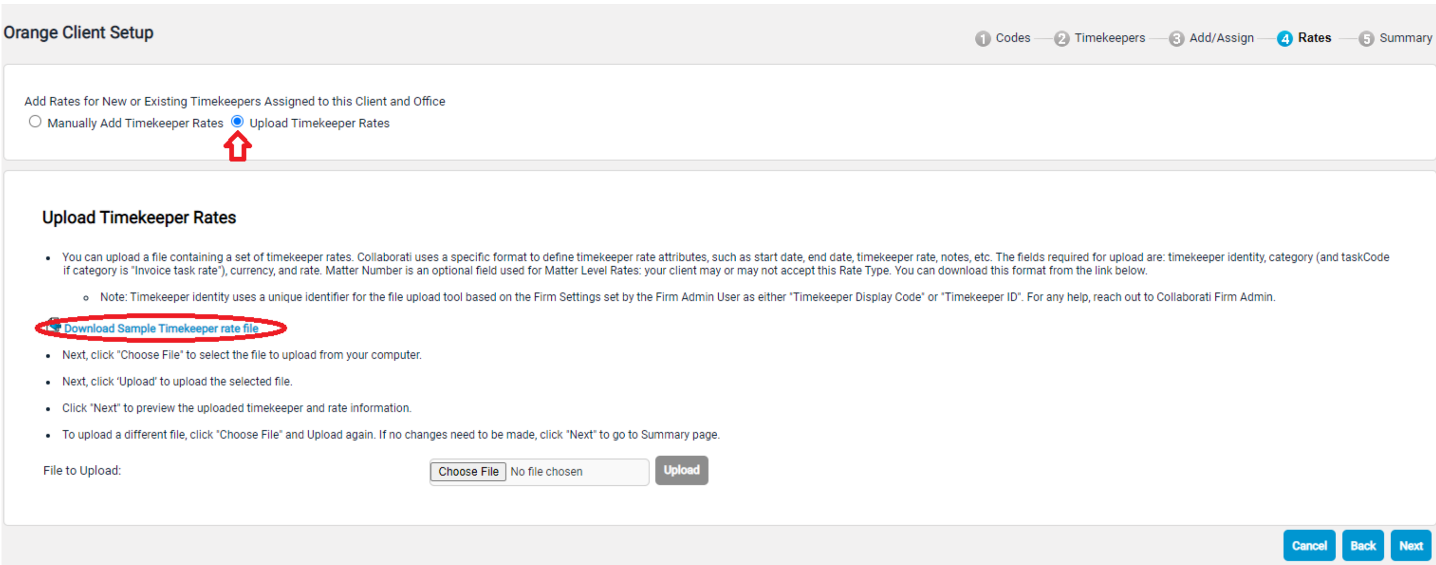
View the Summary without Rates.

4B Add Timekeeper Rates (Uploaded with rates)

To add timekeeper rates to the timekeepers.

Click **Add Timekeeper Rates**.





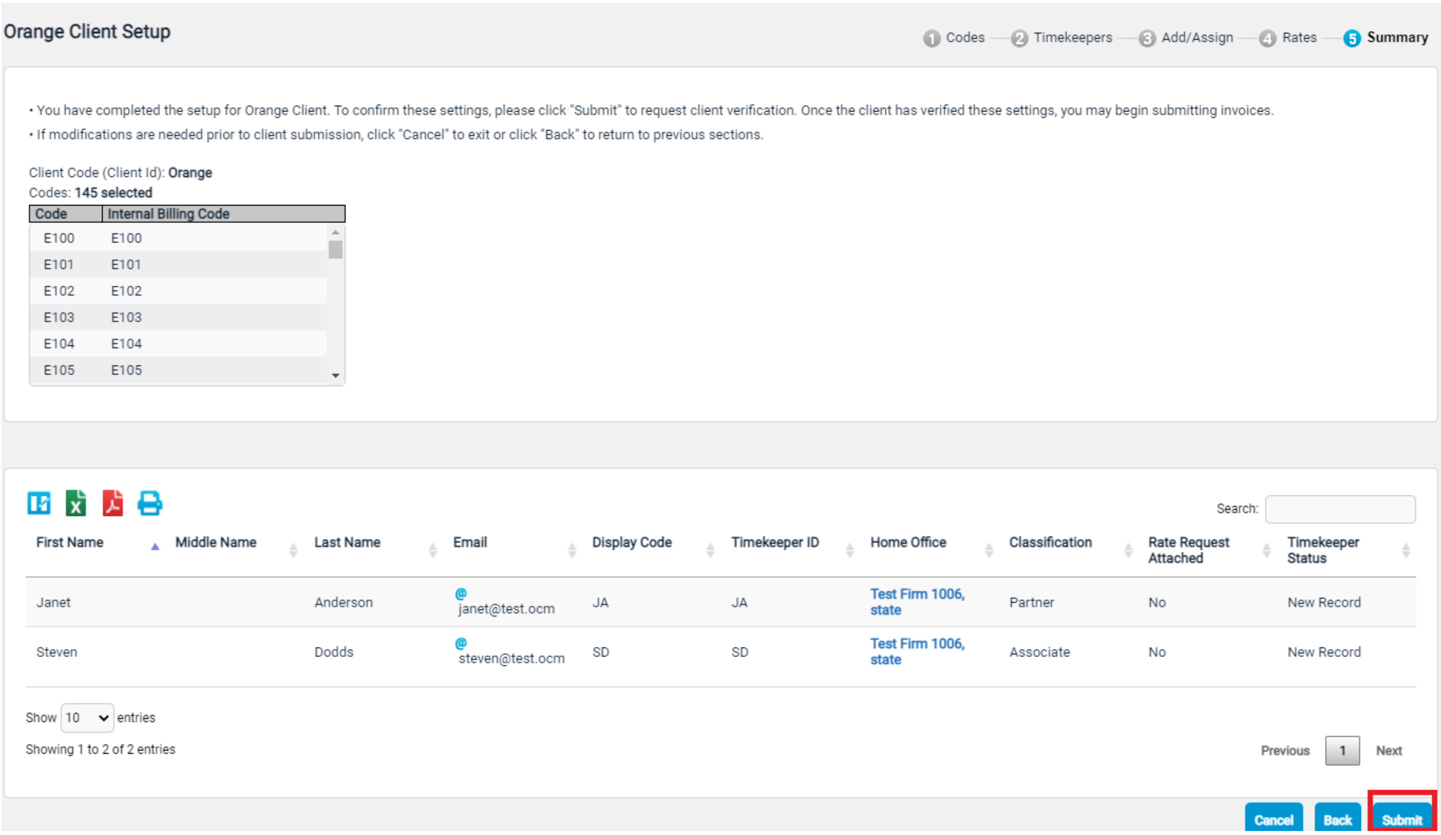
Download the Sample Timekeeper Rate file. For each Timekeeper, enter the rate in the file. One or more rates may be entered for each timekeeper.
Note: The Rate currency should match the billing currency for the Office.

Choose the file and then click **Upload**.
Once the file is Uploaded successfully, click **Next**.

View the Summary with Rates.

5 Summary without Rates

Verify the summary information listed on the screen.

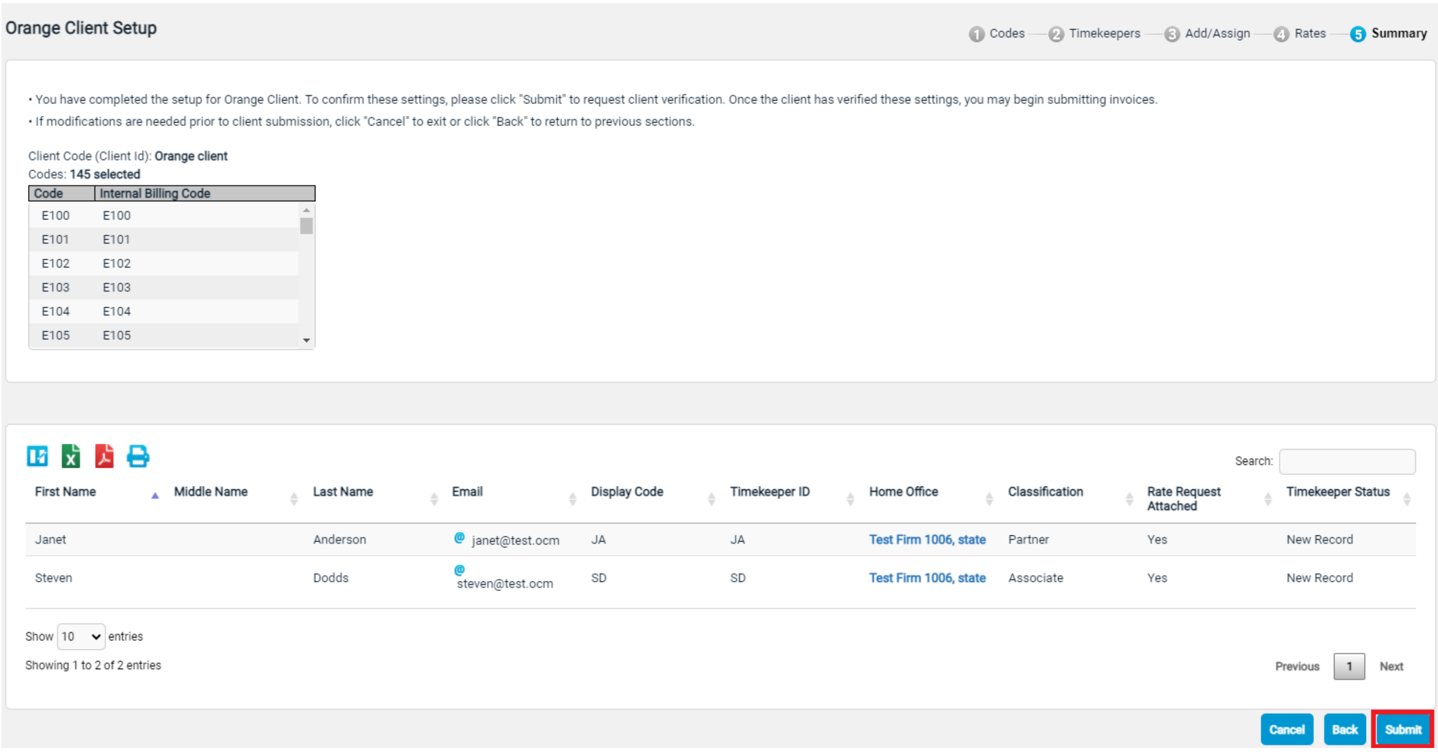


Click **Submit** when you are satisfied with the information.

Skip to Setup Complete

5 Summary with Rates

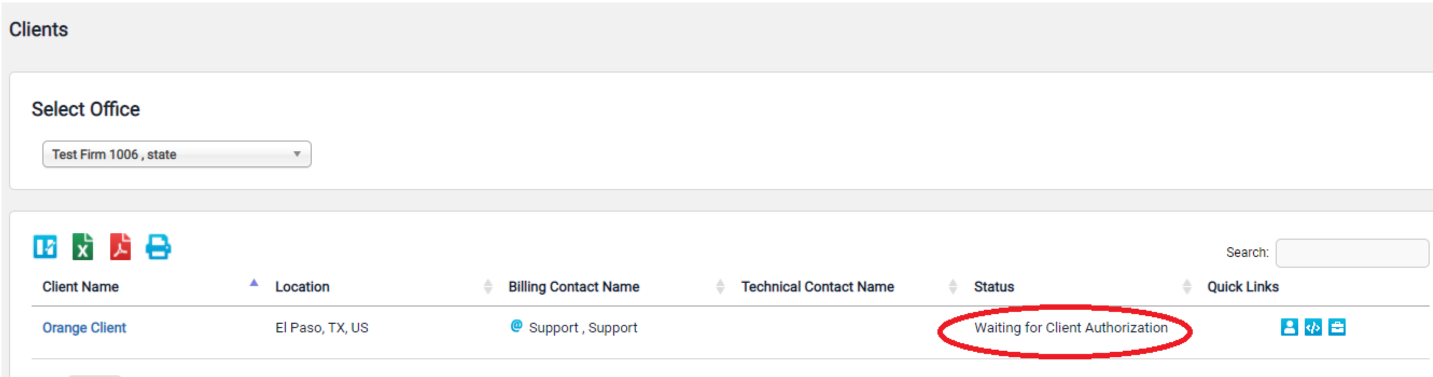
Verify the summary information listed on the screen.



Click **Submit** when you are satisfied with the information.

Setup complete

You will now see this client appear with a status of "**Waiting for Client Authorization**". This means that your timekeepers will need to be authorized by the client. Once the timekeepers are authorized, the client status will change to "**Active**".



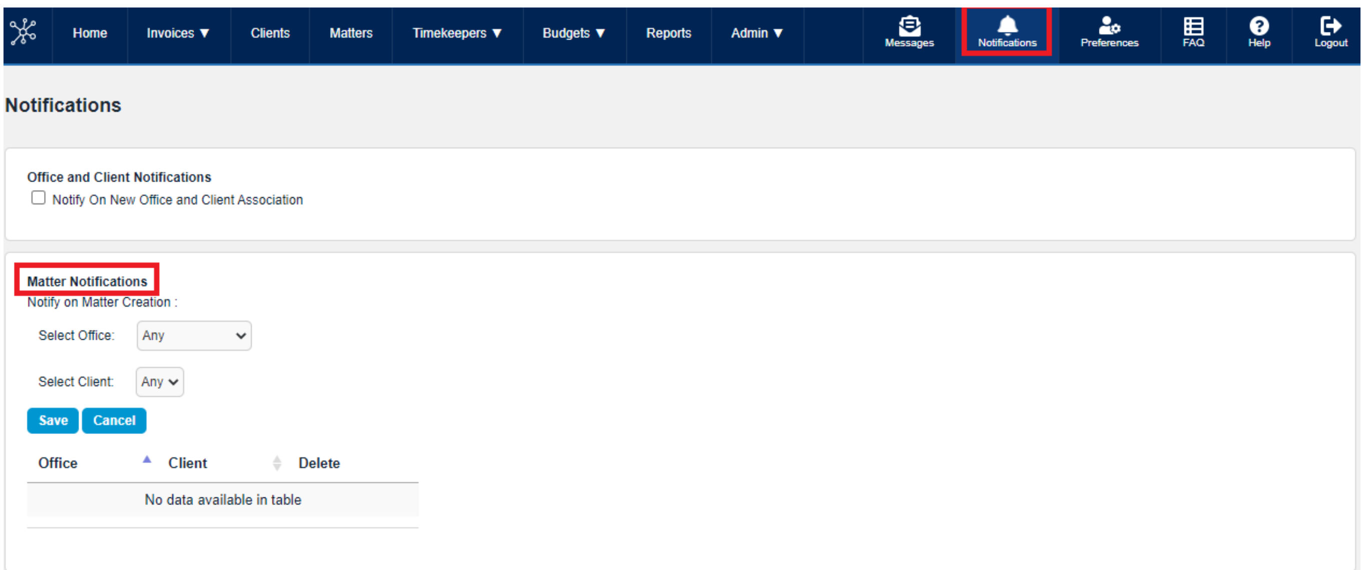
Additional Information

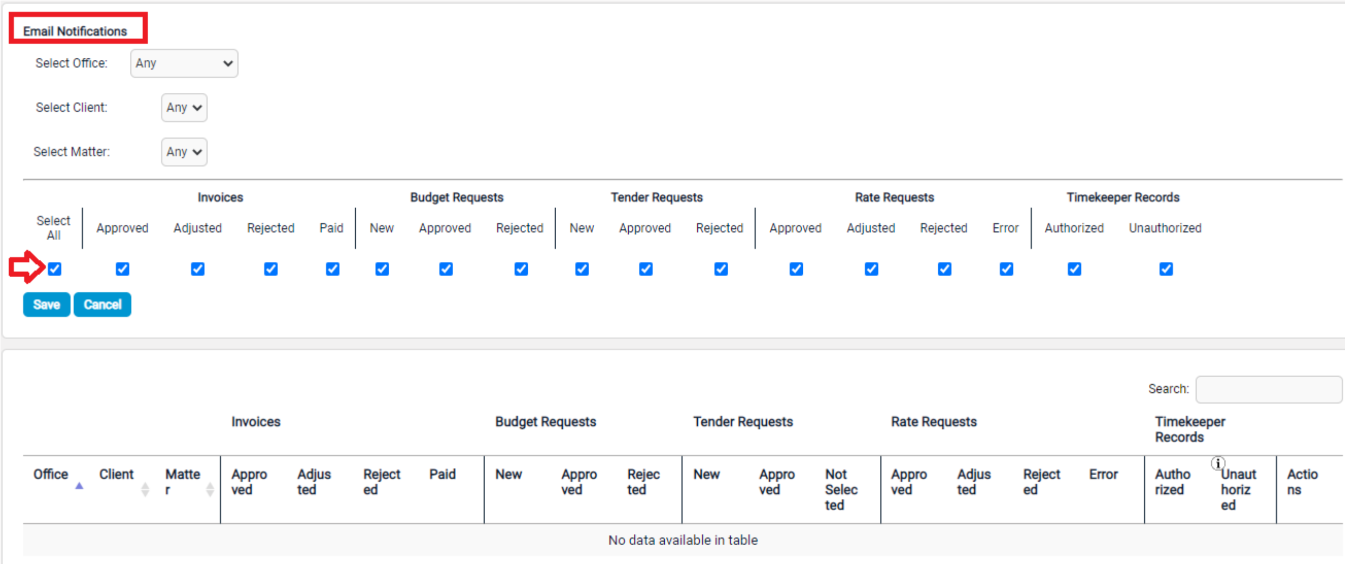
Setup Email Notifications

Optionally, you (or other Users) can sign up for email notifications.
Click **Notifications** in the top menu bar.
Choose any notifications you would like to receive and then click **Save**.
Note: Each user must setup their own Notifications.

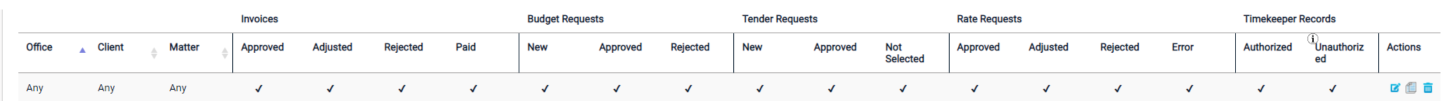
- You can choose to receive **Matter Notifications** for new matters.
- You can choose to receive **Notifications** for Invoices, Budgets, Tenders and Rate Requests, and Timekeeper Authorizations

For example, checking **Select All** will send the notifications for all your clients for Invoices, Budgets, Tenders and Rate Requests, and Timekeeper Authorizations





The table at the bottom of the page shows the notifications that you have signed up for.

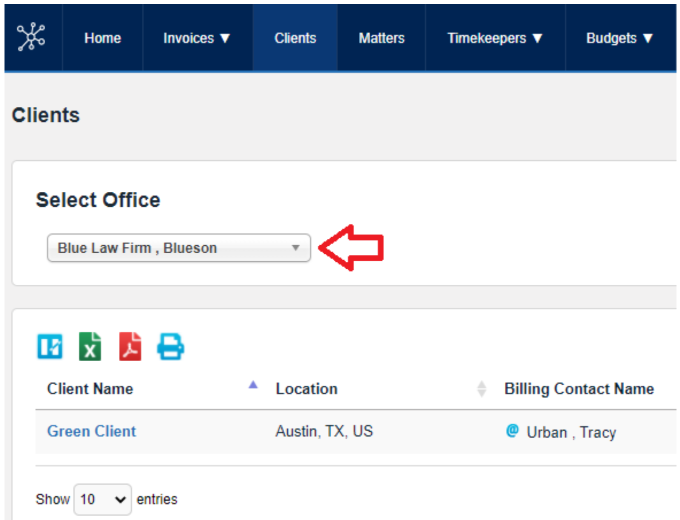


More information about notifications can be found in our help guide here.

Check out our Help guide for more resources: https://success.mitratech.com/Collaborati

Office Accounts

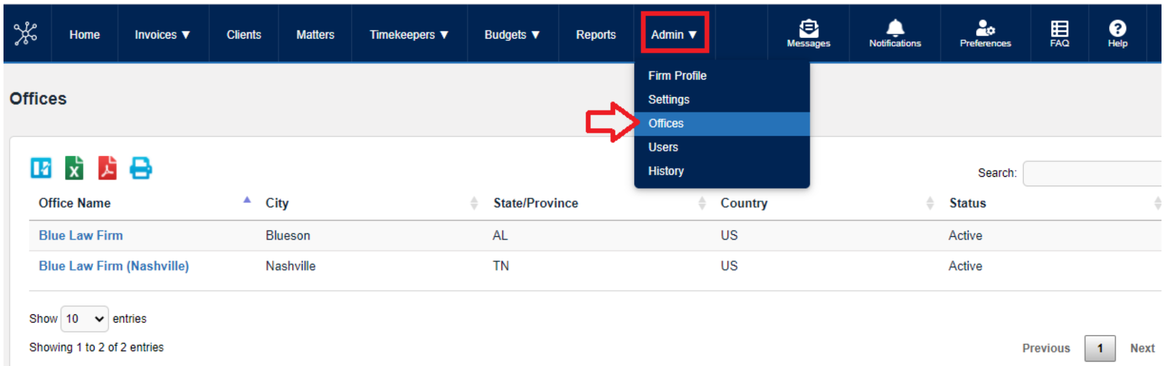
Office Accounts are created by Collaborati Support. You will notice at the top of many pages that the Select Office drop down. Office accounts are used to manage firms with multiple locations. Contact Collaborati Support about merging multiple Office accounts into a Single Firm (Multi-Office Firm).



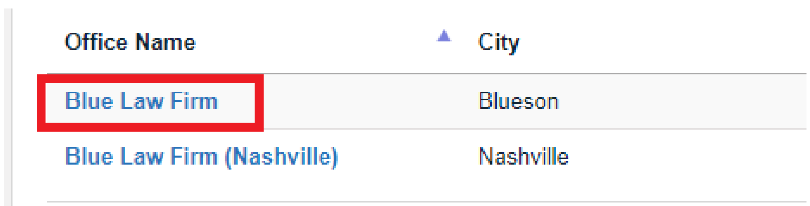
To view a page in Collaborati or create an invoice, you will need to select an “Office” if the office is not already selected.

Office Settings

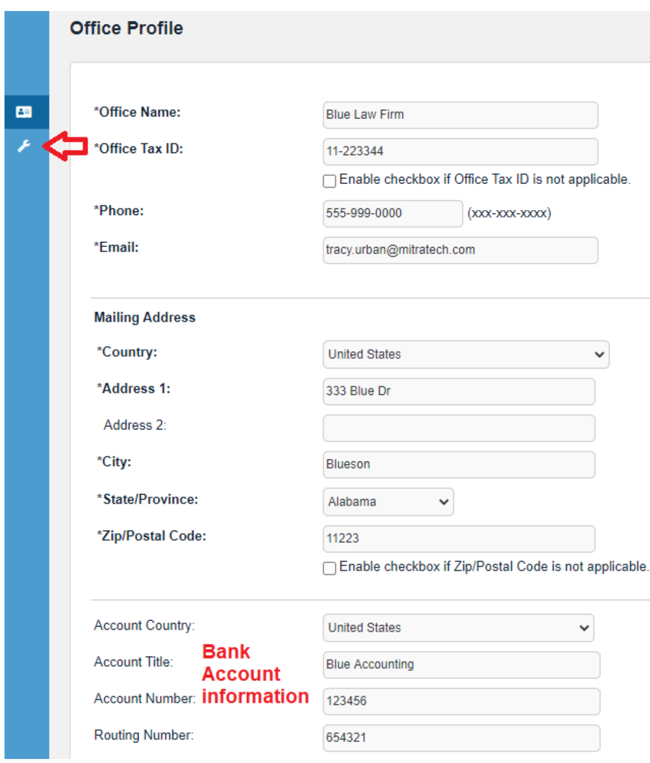
There are two places to check Settings for Firms. Additional information is stored on the Office profile. To locate the settings, such as **Billing Currency** or Time Zone, click on **Admin** in the top menu bar and choose **Offices**



Click on the **Office Name**



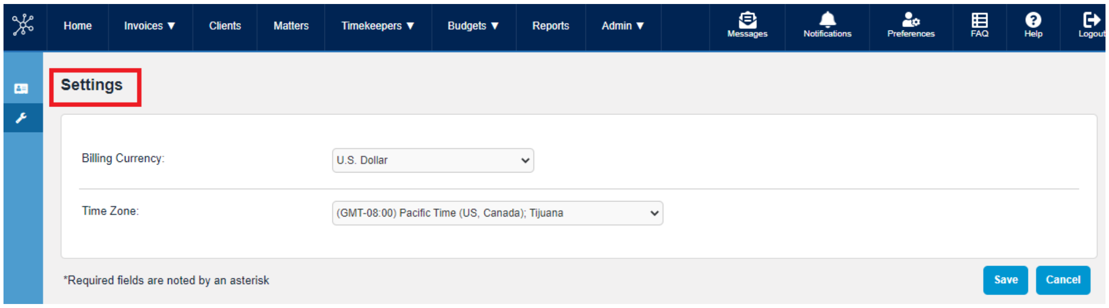
View Office Profile here



The Bank Account Information fields are available on this page (**Account Country, Account Title, Account Number, Routing Number**).

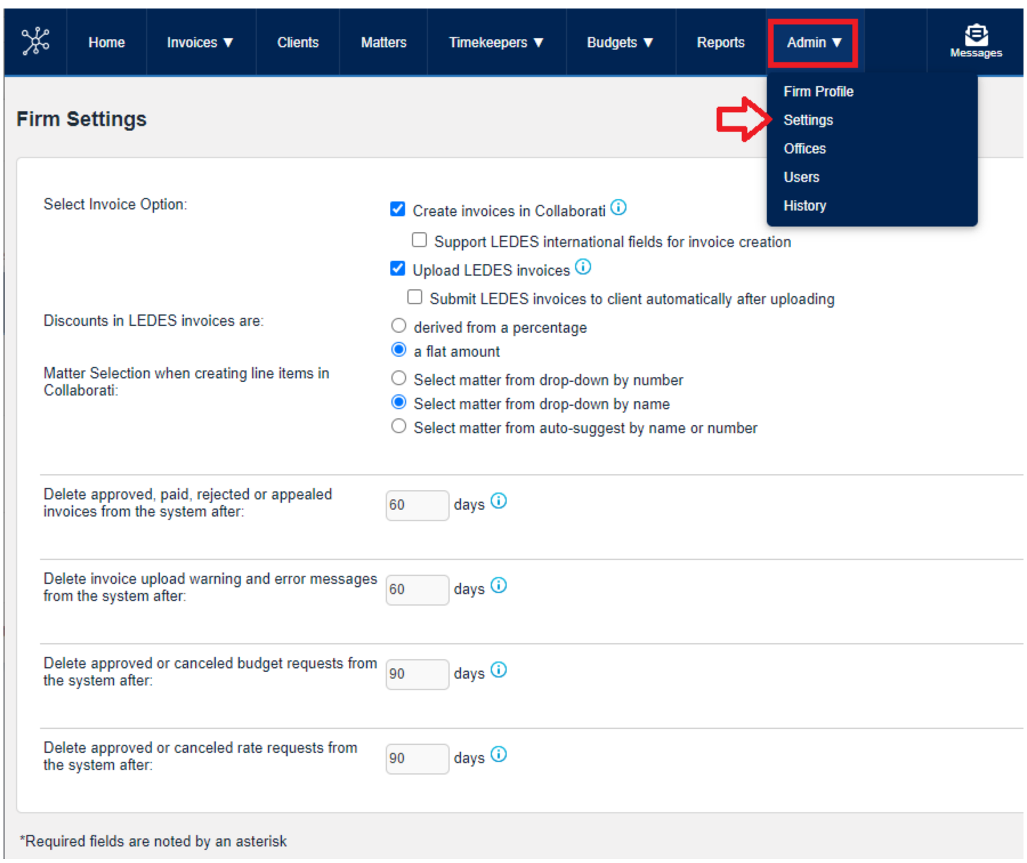
Click on the **Settings** icon in the left navigational bar.

Settings are visible on this page (**Billing Currency, Time Zone**).



Firm Settings

For additional Settings for Firms, such as **Invoice Options** and **Discounts**, click on **Admin** in the top menu bar and choose **Settings**



Best Practices for Multi-Office Firms

Unique Name

Each office should have a unique name. Having a unique name will avoid confusion when creating Rate Requests. A unique name can have all capital letters, punctuation or use parentheses.

Examples: "Austin Law Firm" with unique names

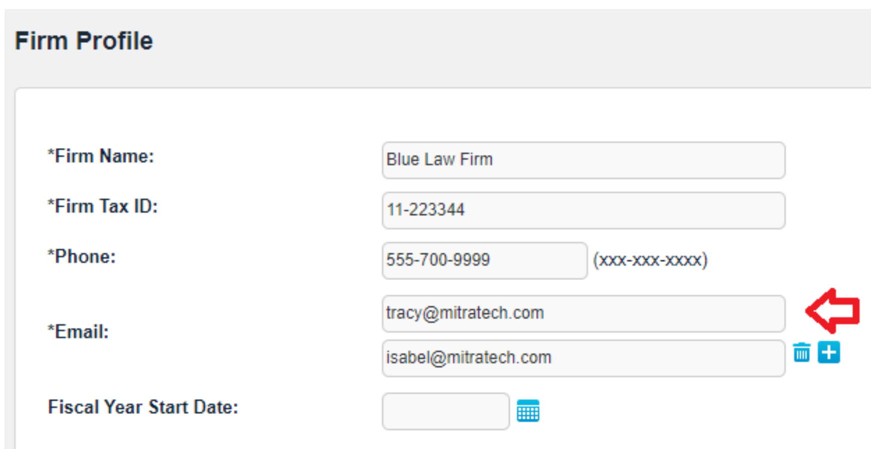
Austin Law Firm
AUSTIN LAW FIRM
Austin Law, Firm
Austin Law Firm (Dallas)

Order of list
Additionally, if there is a particular office that you want to appear at the top of the “Select Office” drop-down list, you can add a number or a space before the name of the Office.

Example (note the first one has a space at the beginning):

 Austin Law Firm (Dallas)
1Austin Law Firm
2AUSTIN LAW FIRM

Billing Contacts
You can add up to 5 different email addresses (for billing contacts) on the Firm Profile page. Click on **Admin** in the Top Menu bar.



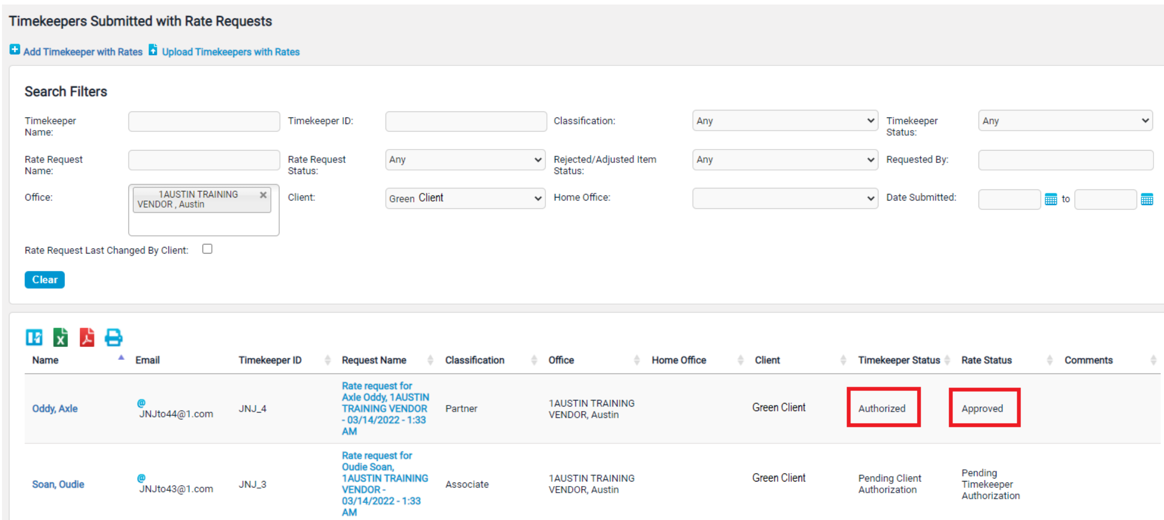
Review Users
You can disable any users that no longer need to have access by clicking on Admin in the top menu bar and then choose "Users".

Review Timekeepers
Contact Collaborati Support for assistance with merging duplicate Timekeepers across Offices.

Checking for Rate Approval

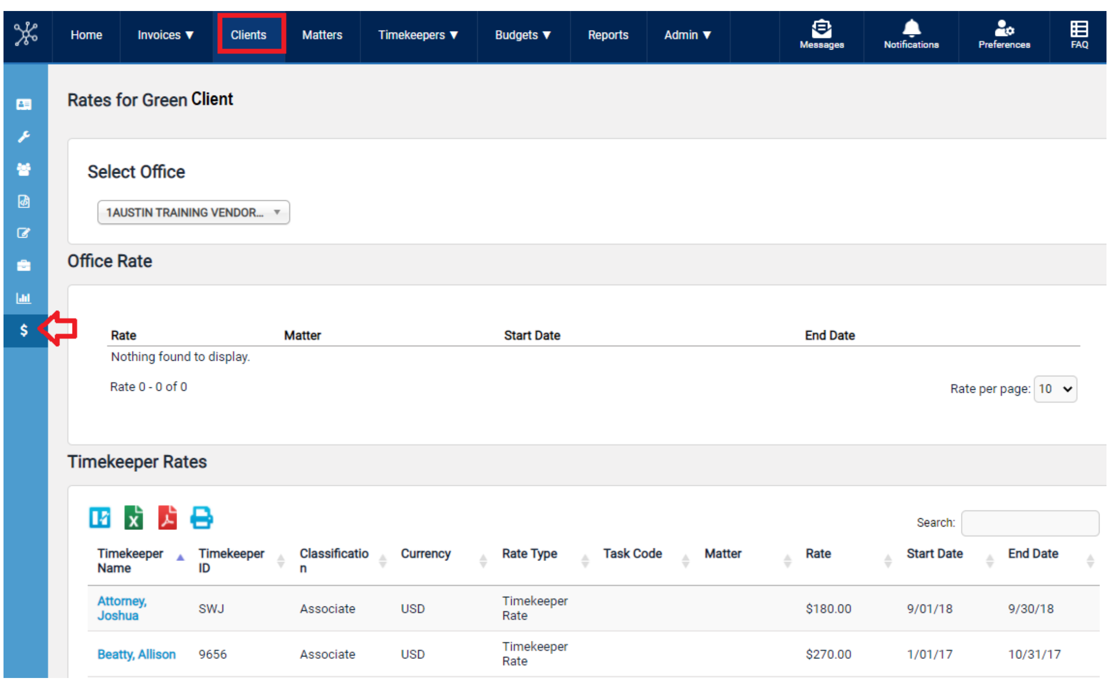
To check if your rates have been approved, you can review the Timekeeper and Rate details.

1. Hover over “Timekeepers” in the top menu bar
2. Click “Timekeepers with Rates”
3. Find the Timekeeper’s Name to review the details



OR check the Rates from the Client’s page

1. Click “Clients” in the top menu bar.
2. Click on the “$” on the left navigation menu (Rates) (see below)



Invoice Submission

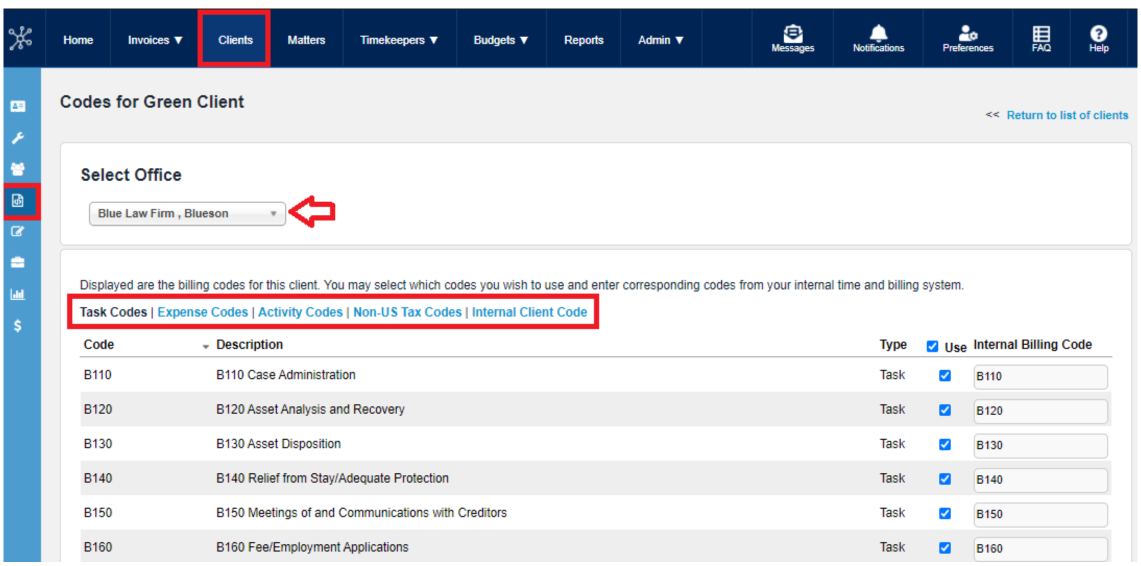
After your rates have been approved by your client, you can begin submitting your invoices. In most cases, your client will require a line item for every function being billed.

Collaborati allows two different options: **Creating an invoice manually** or **Uploading a LEDES file**.

Manual Invoice Submission

Creating an invoice manually is the choice to using a LEDES file created by automated billing software.

You may want to begin by familiarizing yourself with your client's Billing Codes. To view the codes in Collaborati, follow these steps:
1. Click "**Clients**" in the top menu bar
2. Click on the client's name
3. Click the fourth icon from the top on the left navigation menu ("**Codes**")
4. Click "**Select Office**" to choose the correct Office from the dropdown menu.
5. Displayed are the billing codes for this client.
6. Click on either "**Task Codes**" or "**Expense Codes**" to view the list of available codes.
 (shown below in the screen shot).

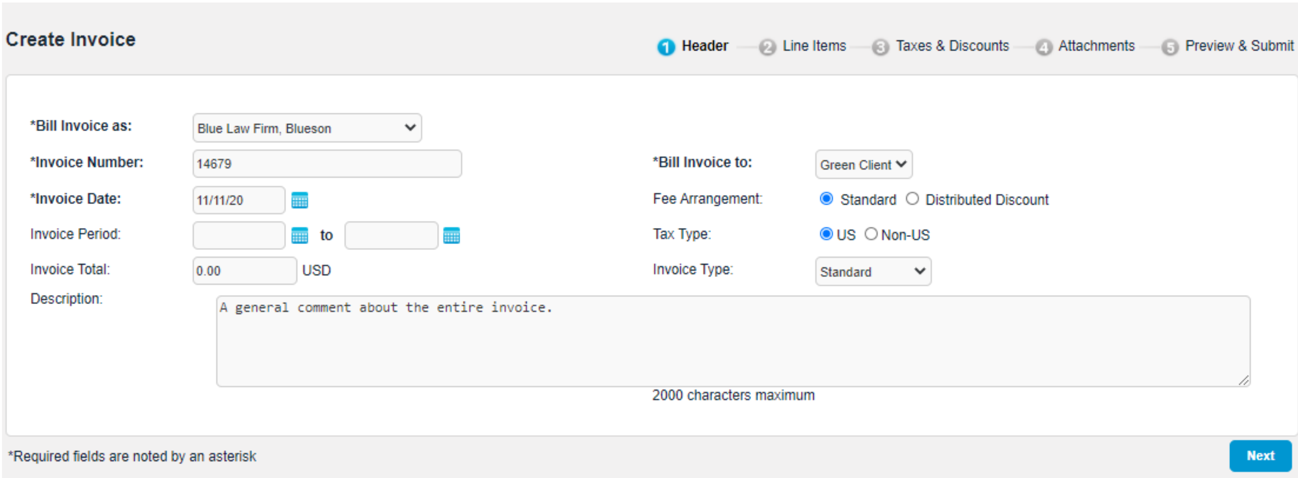


To start creating your invoice:

- Click "**Invoices**" in the top menu bar.
- Choose "**Create Invoice**".
- Click "**Bill Invoice As**" to choose the correct Office from the dropdown menu.

Fill in pertinent information. Most clients require the **Invoice Period**. **Invoice Date** must be after **Invoice Period**. It is recommended to leave the **Invoice Total** at $0.00 as Collaborati will automatically add the amount. Place a brief description of the invoice in the **Description** box.

1 HEADER

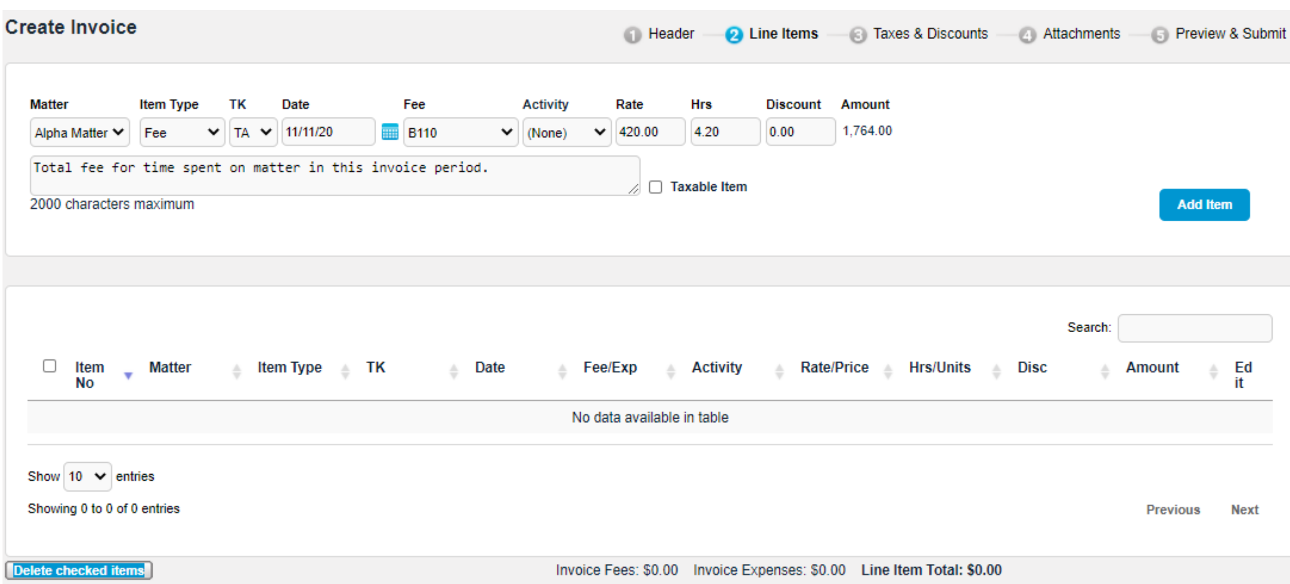


- Click **Next** button

2 LINE ITEMS: Fee Input

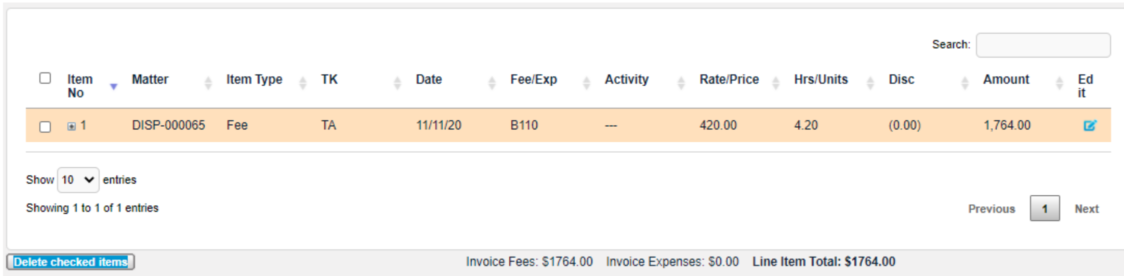
Fee line items require you to have an authorized Timekeeper and also an approved rate for that Timekeeper within the client's fiscal year corresponding to your invoice.

Select your **Matter** from the drop-down list. **Item Type** is Fee. **TK** is the timekeeper. **Fee** is the code from your Task Codes list. **Activity** is the code from your Activity Codes list. **Rate** is the hourly rate of the timekeeper used (authorized by the client). **Hours** is the amount of time the timekeeper worked on the matter. A description of the fee should be typed into the **Description** box.



- Click on the **Add Item** button to finish the line item fee input.

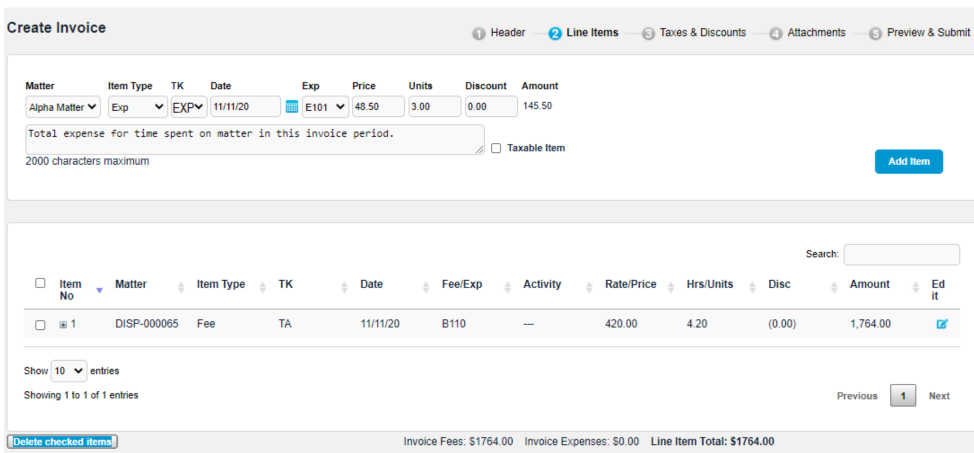
LINE ITEMS: Fees Complete



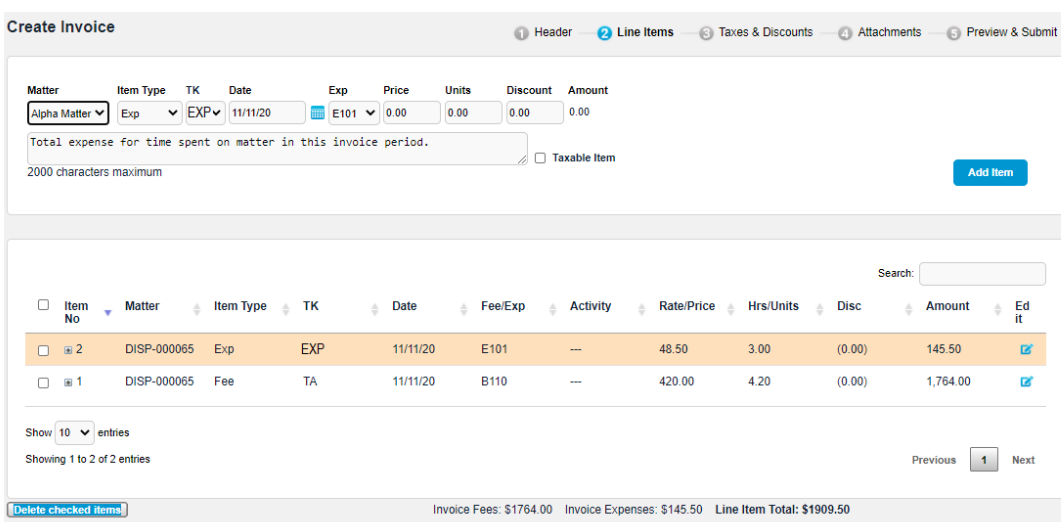
LINE ITEMS: Expenses Input

Expense line items require you to have an authorized Expense timekeeper with an approved Timekeeper rate.

Similar process as Fee input, select your **Matter** from the drop-down list. **Item Type** is Exp. The **TK** should be the authorized Expense Timekeeper . **Exp** is the code from your Expense Codes list. Enter the **Price** and **Units**. A description of the expense should be typed into the **Description** box.



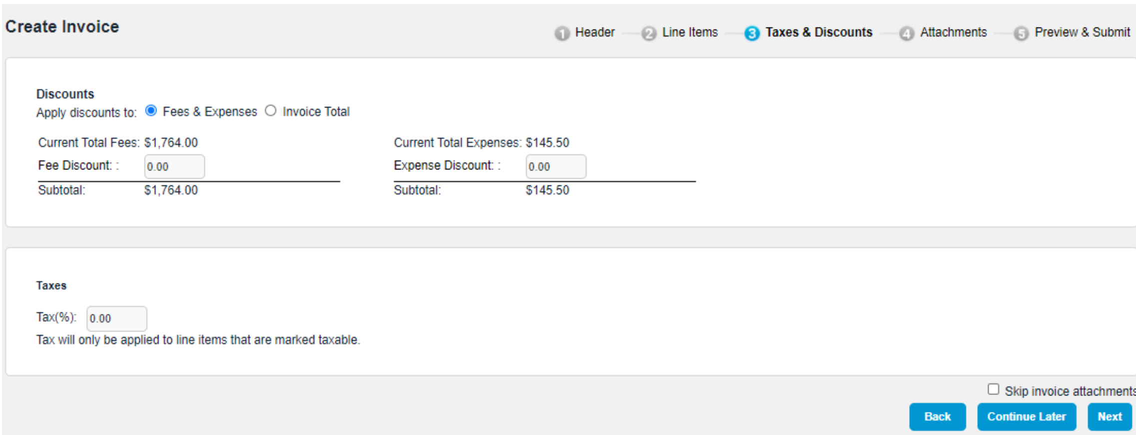
LINE ITEMS: Expenses Complete



- Click **Next** button

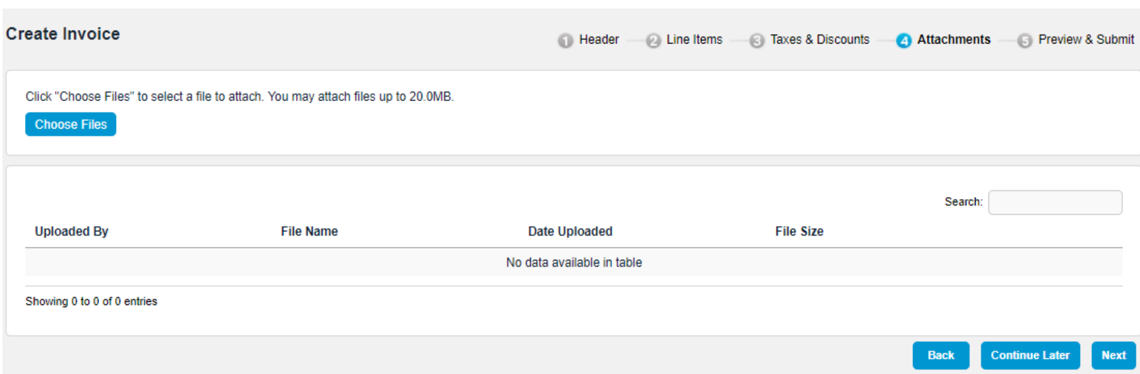
3 TAXES AND DISCOUNTS

If you are applying discounts to the invoice, here is where you apply your discount on Fees and / or Expenses. Consult your client if you need to enter tax on your invoice.

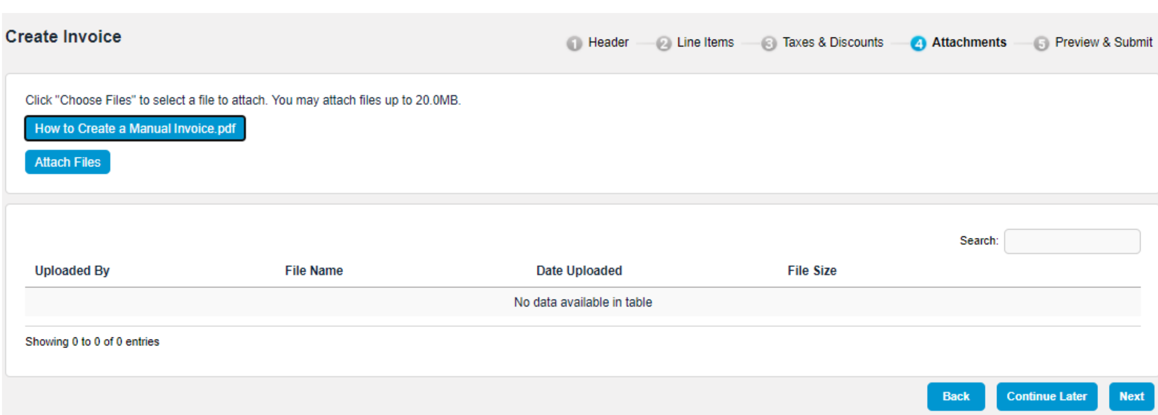


- Click **Next** button

4 ATTACHMENTS

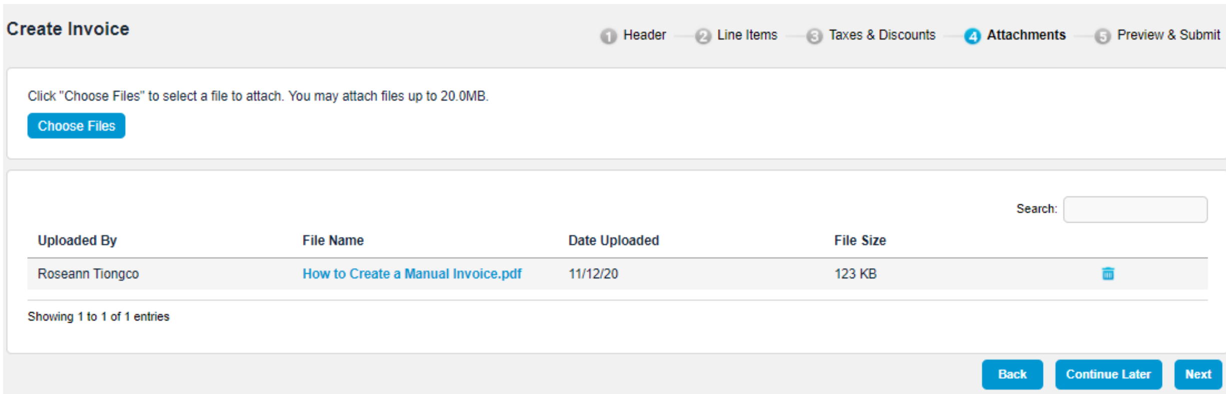


Use the **Choose Files** button to search for the document that you wish to attach.



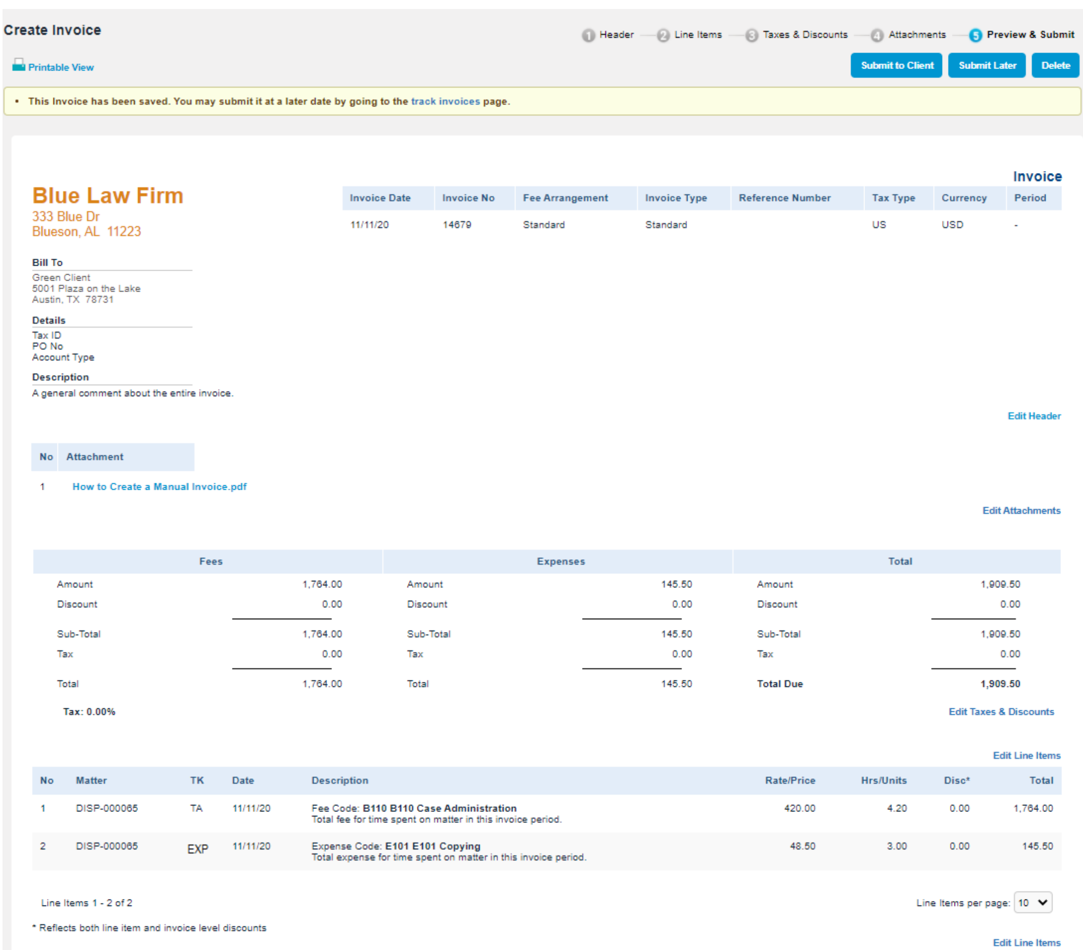
After you have found the document, click on the **Attach Files** button.

The attached document will appear in the attachment section.



- Click **Next** button

5 PREVIEW Completed Invoice



LEDES Invoice Submission

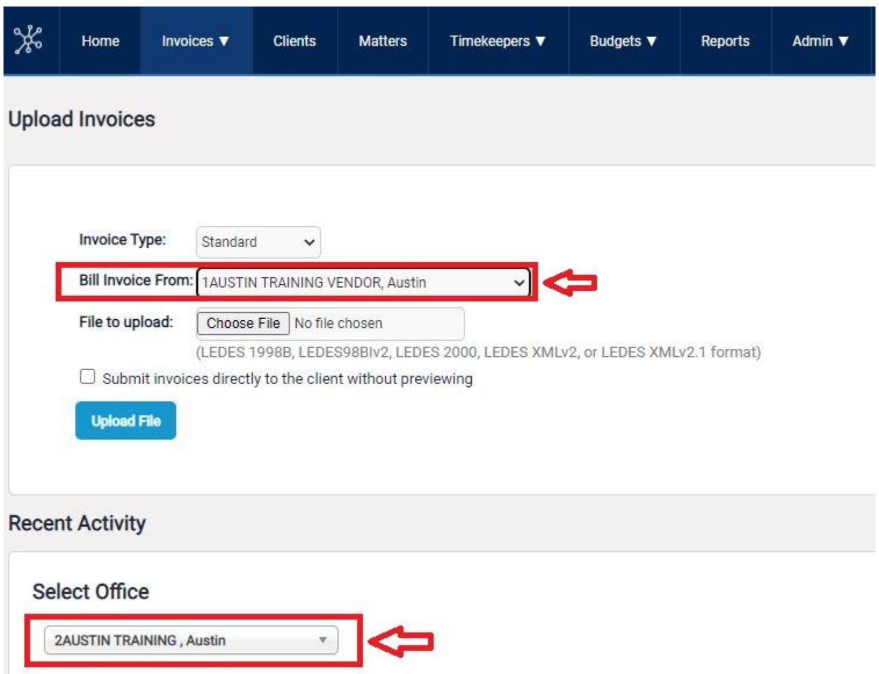
To start uploading your file:

- Hover over **Invoices** in the top menu bar
- Click **Upload Invoices**

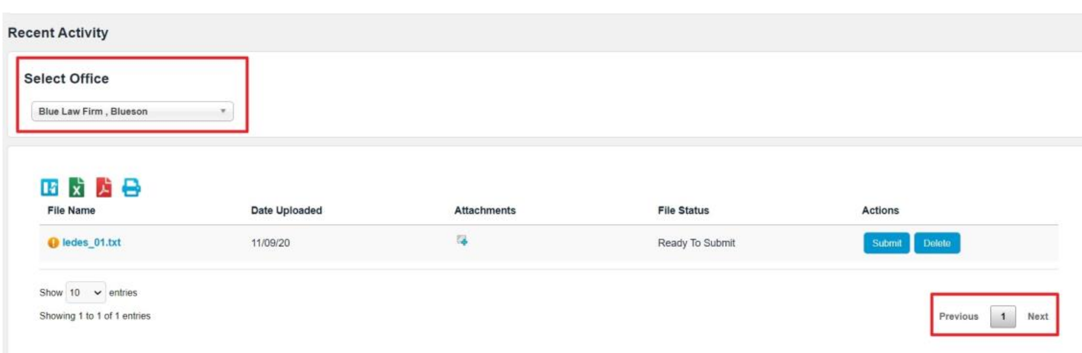
Choose **Invoice Type**: Standard (default is Standard)
Choose **Bill Office From** field
Click **Choose File** and browse for your file.

If you have any **attachments**, do not check the box “Submit invoices directly to the client without previewing”.

Choose the **Select Office** field.

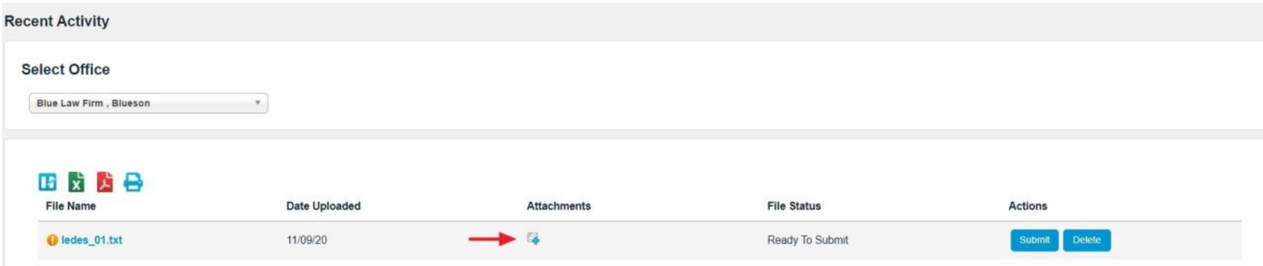


Click **Upload File**

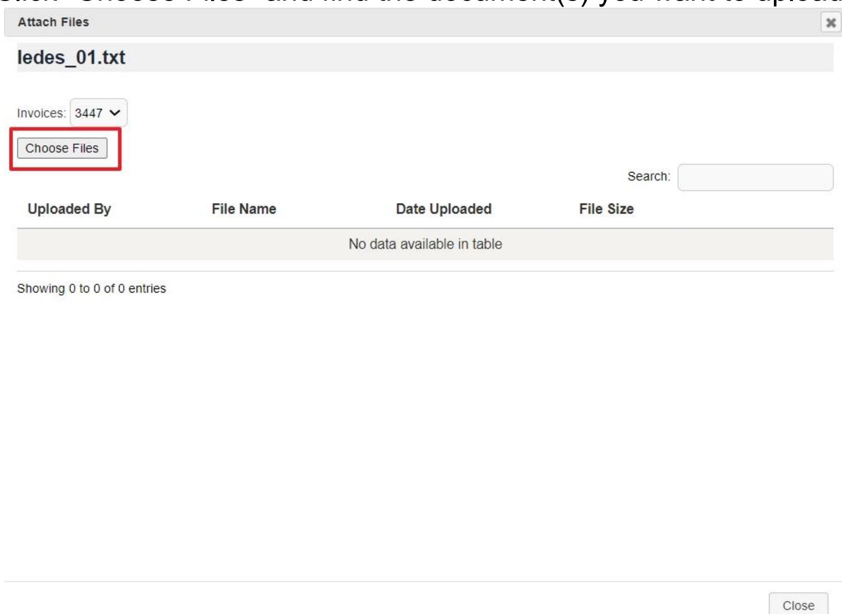


If your invoice file has errors, you can click on the “File Errors” link to review any error messages. You will need to resolve any file errors before you can submit your invoice. If your file has a status of “Ready to Submit”, you can add **attachments** or click Submit.

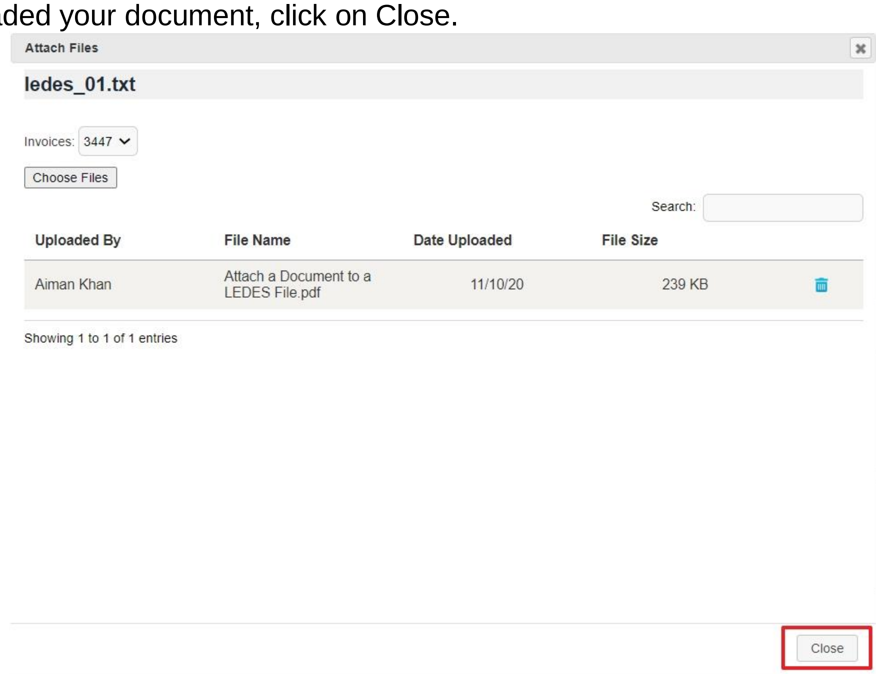
If you have any **attachments**, click on the grey Paperclip icon  in the Attachments column.



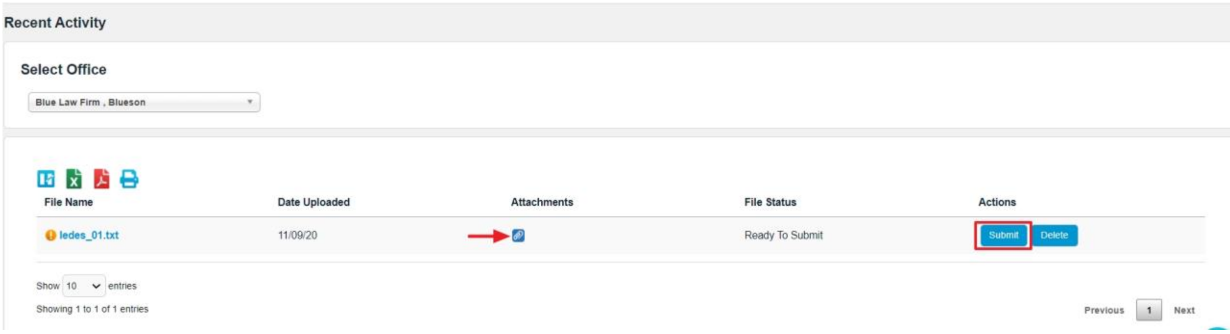
Click “Choose Files” and find the document(s) you want to upload.



Once you have uploaded your document, click on Close.



Your Attachment is indicated by a blue Paperclip icon .



If you need to review the details of the Invoice (such as the Line Items or totals) you can click on the “File Name” and then click on the “Invoice Number”.