

# SETUP GUIDE FOR VENDORS (Lawtrac/LT)

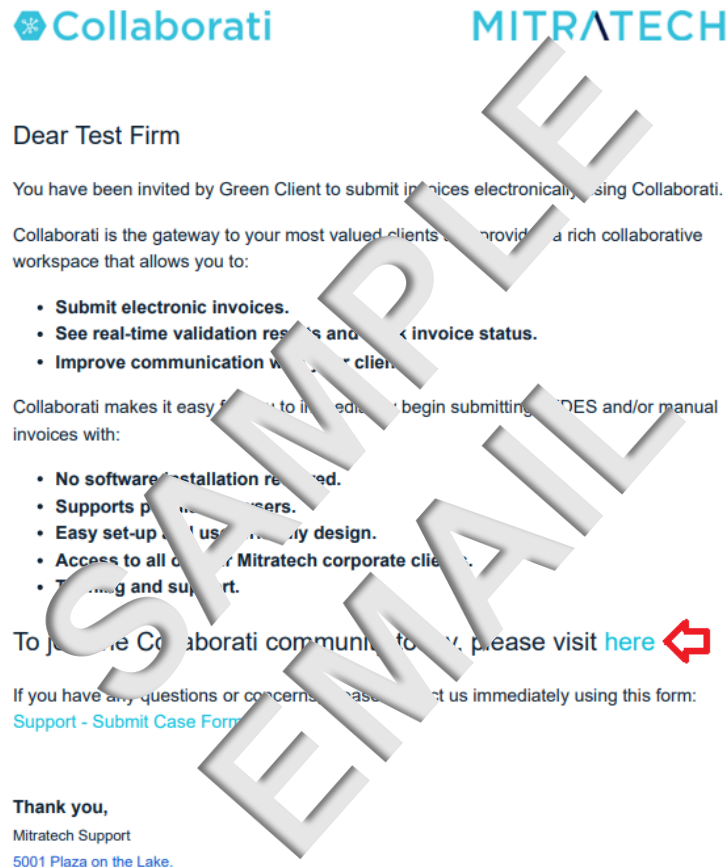
## Steps to complete setup for new firms

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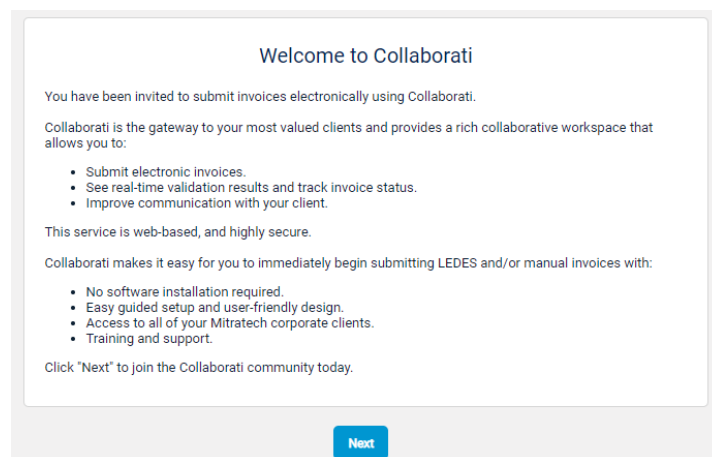
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## New Vendor/Firm Setup: Register

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".



Click on the link in the registration email to begin.



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.

The screenshot shows a web interface titled "Registration" with a progress indicator showing "1 License Agreement" and "2 Create Account". The main heading is "Welcome Test Firm". Below it, a message says: "Please read through the License Agreement below and select **I accept...** in order to proceed." The "License Agreement" section is highlighted, with a "Printable Version" link. The agreement text includes: "COLLABORATI SERVICES AGREEMENT", "Mitrtech welcomes you to Collaborati™. This agreement ('Agreement') describes the terms on which you may access and use the Collaborati™ service ('Service'), a component of Mitrtech's Collaborati Spend Management Online Services and analogous e-billing services ('CSM').", "NOTICE: IN ADDITION TO THE TERMS AND CONDITIONS CONTAINED HEREIN, AUTHORIZED USERS OF COLLABORATI™ MUST READ, AGREE TO, AND ABIDE BY THE PRIVACY POLICY AS EXPLAINED AT THE FOLLOWING WEBSITE: [http://www.mitrtech.com/privacy-policy](\"http://www.mitrtech.com/privacy-policy\").", and "ALSO, AUTHORIZED USERS OF COLLABORATI™ MUST REVIEW THE [PRICING INFORMATION LETTER FROM MITRATECH BEFORE CLICKING BELOW](\"#\"). By clicking the **'I AGREE'** button below or by using the". At the bottom, there are two radio buttons: "I accept the License Agreement" (selected) and "I do not accept the License Agreement". Below the radio buttons are "Back" and "Next" buttons.

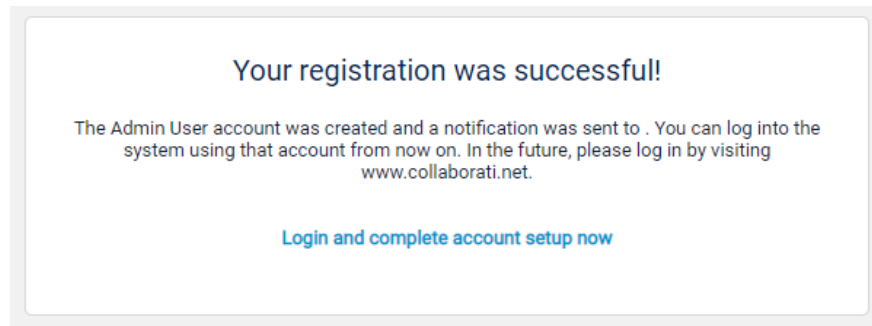
*Please note: The vendor must agree with the Collaborati End User Agreement terms and conditions, otherwise access to Collaborati would be denied.*

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.

The screenshot shows a web interface titled "Registration" with a progress indicator showing "1 License Agreement" and "2 Create Account". The main heading is "Please create an administrator account in order to complete your registration." The form fields are: "\*Email:" (tracy1007@mitratech.com, with a note "(This will be used as your login username)"), "\*Password:" (masked with dots), "\*Confirm Password:" (masked with dots), "Firm Name:" (Test Firm 1007), "User Type:" (Admin), "\*First Name:" (Tracy), "Middle Name:" (empty), "\*Last Name:" (U), and "Phone:" (empty, with a note "(xxx-xxx-xxxx)"). At the bottom, there is a note "\*Required fields are noted by an asterisk" and "Back" and "Next" buttons.

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**.

**Firm Profile** 1 General Information 2 Settings

\*Firm Name: Test Firm 1007 Registration Date:

\*Firm Tax ID: 999998992

\*Phone: 1111111111 (xxx-xxx-xxxx)

\*Email: tracy.urban@mitratech.com

Fiscal Year Start Date:

**Mailing Address**

\*Country: United States

\*Address 1: 1007 Main Street

Address 2:

\*City: Wichita

\*State/Province: Kansas

\*Zip/Postal Code: 55555

Active Users: 1  
Total Users: 1 [View List of Users](#)

\*Required fields are noted by an asterisk

\*Contact Information Verified: ☐ **Next**

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

**Firm Settings** 1 General Information 2 Settings

Profile has been updated

Select Invoice Option: ☒ Create Invoices in Collaborati [?](#)  
☐ Support LEDES international fields for invoice creation

☒ Upload LEDES Invoices [?](#)  
☐ Submit LEDES invoices to client automatically after uploading

Discounts in LEDES invoices are:  
☐ derived from a percentage  
☒ a flat amount  
☐ Select matter from drop-down by number

Matter Selection when creating line items in Collaborati:  
☒ Select matter from drop-down by name  
☐ Select matter from auto-suggest by name or number

Delete approved, paid, rejected or appealed invoices from the system after: 60 days [?](#)

Delete invoice upload warning and error messages from the system after: 60 days [?](#)

Delete approved or canceled budget requests from the system after: 90 days [?](#)

Delete approved or canceled rate requests from the system after: 90 days [?](#)

Use the following Timekeeper identifier on Rate Upload File:  
☒ Timekeeper Display Code  
☐ Timekeeper ID

\*Required fields are noted by an asterisk

**Back** **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**.

**Office Profile Setup** 1 General Information — 2 Settings

To begin, please enter your general information.

\*Office Name:

\*Office Tax ID:

\*Phone:  (xxx-xxx-xxxx)

\*Email:

---

**Mailing Address** Payment Address Same as Mailing Address? ☒ Yes ☐ No

\*Country:

\*Address 1:

Address 2:

\*City:

\*State/Province:

\*Zip/Postal Code:

\*Required fields are noted by an asterisk

**\*Contact Information Verified:** ☐ 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.

**Office Profile Setup** 1 General Information — 2 Settings

Billing Currency:

Time Zone:

\*Required fields are noted by an asterisk

Back Save

## 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

The screenshot shows the Collaborati Home page. The top navigation bar includes links for Home, Invoices, Clients, Matters, Timekeepers, Budgets, Reports, Admin, Messages, Notifications, Preferences, FAQ, Help, and Logout. The main content area is titled "Welcome to Collaborati, Tracy". It features three main sections: Messages, Recent Invoice Activity, and Budget Requests. The Messages section contains a message titled "Please complete setup for Orange Client - Test Firm", which is circled in red. The Recent Invoice Activity section shows a table with columns for Invoice Number, Submitted By, Invoice Status, Client, and Invoice Date, and a message stating "No data available in table". The Budget Requests section shows a table with columns for Budget Request, Office, Client Name, Matter, Request Date, and Due Date. On the right side, there are Quick Links for View Timekeepers, View Clients, Create Invoice, Upload Invoice, and Viewability. Below these are Get Online Training links for Create Invoices, Track Invoices, and Administer Collaborati, with a Get Started button and a note about optimization for 1280 x 1024 resolution.

Below are steps in completing a client set up

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.

Orange Client Setup

1 Codes — 2 Timekeepers — 3 Add/Assign — 4 Rates — 5 Summary

Please enter the code used to identify this client in your LEDES files/time and billing system. For multiple client codes, separate each code by commas, e.g. 123, 456.

\*Client Code (Client Id): **CLIENT ID HERE**

These are the codes accepted by Orange Client. You may accept them as is, or you may deselect ones you do not intend to use. You may also assign them an Internal Billing Code to match up with your time and billing system by typing into the field. Click "Next" at the bottom of the page when you are done.

Code	Description	Type	Select Codes	Internal Billing Code
A101	A101 Plan and prepare for	Activity	<input checked="" type="checkbox"/> Use	A101
A102	A102 Research	Activity	<input checked="" type="checkbox"/> Use	A102
A103	A103 Draft/revise	Activity	<input checked="" type="checkbox"/> Use	A103
A104	A104 Review/analyze	Activity	<input checked="" type="checkbox"/> Use	A104
A105	A105 Communicate (in firm)	Activity	<input checked="" type="checkbox"/> Use	A105
A106	A106 Communicate (with client)	Activity	<input checked="" type="checkbox"/> Use	A106
A107	A107 Communicate (other outside counsel)	Activity	<input checked="" type="checkbox"/> Use	A107
A108	A108 Communicate (other external)	Activity	<input checked="" type="checkbox"/> Use	A108
A109	A109 Appear for/attend	Activity	<input checked="" type="checkbox"/> Use	A109
A110	A110 Manage data/files	Activity	<input checked="" type="checkbox"/> Use	A110

Codes 1 - 10 of 145

1 2 3 4 5 6 7 8 9 10 ..... 15 ▶

Codes per page: 10 ▼

\*Required fields are noted by an asterisk

Cancel Next

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.

Orange Client Setup

1 Codes — 2 Timekeepers — 3 Add/Assign — 4 Rates — 5 Summary

Next, you will need to add at least one timekeeper in order to proceed. Select an option:

**Assign/Add New:** Use this option if your Timekeepers are already in the system; you will be able to select one or more to assign to this client. You can also manually type in a few new Timekeepers. You can always add more Timekeepers later.

**Upload New Timekeepers:** Use this option if you have downloaded and filled in the Sample Timekeepers 4.0 CSV file and are ready to upload it. You can always add additional Timekeepers later using the upload file.

Collaborati uses a specific format to define Timekeeper attributes, such as Timekeeper Name, Classification (or category), ID, Display Code, and Client Specific Profiles. You can download this format from the link below.

[Download Sample Timekeepers 4.0 File](#)  
tk.csv(0.8kb) - Comma Separated Value (CSV) file

Timekeepers:

☒ Assign existing and/or add new timekeepers

☐ Upload new timekeepers

No file chosen

☐ Overwrite existing timekeeper profiles ⓘ

### 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.

\$

### Timekeeper Profile

<< [Return to list of Timekeepers](#)

\*Email:

exp@tk.ocm

Salutation:

\*First Name:

Expense

Middle Name:

\*Last Name:

Timekeeper

Suffix:

Phone:

(xxx-xxx-xxxx)

Mobile Phone:

(xxx-xxx-xxxx)

Fax:

(xxx-xxx-xxxx)

City:

State/Province:

--Select--

Post Code:

Country:

United States

Gender:

--Select--

Disability:

--Select--

Veteran:

--Select--

Account Status:

☒ Active ☐ Inactive

\*Display Code:

ET

\*Timekeeper ID:

ET

\*Classification:

Partner

First Year In Current Category:

Permitted to Practice Year:

JD / Bar Year:

Practice Area:

None

Primary Expertise:

None

Secondary Expertise:

None

Clerkships:

Licensed To Practice Law In:

None

Languages Spoken:

None

Race:

--Select--

LGBTQ:

--Select--

Home Office:

Select Home Office

\*Clients:

☐ Acme Corporation Client

☐ Bricks and Buttons Inc.

☐ Client Name

10

### 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.

Orange Client Setup 1 Codes — 2 Timekeepers — 3 Add/Assign — 4 Rates — 5 Summary

Select the checkbox to assign the timekeeper(s) for the client. You can also add new timekeeper(s) into the system. Click "Add Timekeepers Rates" to add the rates information (or) click "Submit" to review and submit the timekeeper(s) information without rates.

\*Email:  \*First Name:  \*Last Name:  \*Timekeeper ID:  ⓘ

\*Display Code:  ⓘ Home Office:  \*Classification:

+ Additional Timekeeper Fields

**Add**


---



**Search Filters**

Name:  Email:  Timekeeper ID:  Classification:  Home Office:

**Clear**

---



Name	Email	Display Code	Timekeeper ID	Classification	Home Office	<input checked="" type="checkbox"/> Assign	Edit
Anderson, Janet	 janet@test.oom	JA	JA	Partner	Test Firm 1006, state	<input checked="" type="checkbox"/>	

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

Orange Client Setup 1 Codes — 2 Timekeepers — 3 Add/Assign — 4 Rates — 5 Summary


Select the checkbox to assign the timekeeper(s) for the client. You can also add new timekeeper(s) into the system. Click "Add Timekeepers Rates" to add the rates information (or) click "Submit" to review and submit the timekeeper(s) information without rates.

\*Email:  \*First Name:  \*Last Name:  \*Timekeeper ID:  ⓘ

\*Display Code:  ⓘ Home Office:  \*Classification:

+ Additional Timekeeper Fields

**Add**

 optional fields (some clients require)

### 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.

Name	Email	Display Code	Timekeeper ID	Classification	Home Office	<input type="checkbox"/> Assign
Anderson, Janet	janet@test.ocm	JA	JA	Partner	Test Firm 1006, state	<input checked="" type="checkbox"/>
Barnes, Adam	adam@test.ocm	AB	AB	Associate	Test Firm 1007, state	<input type="checkbox"/>
Dodds, Steven	steven@test.ocm	SD	SD	Associate	Test Firm 1006, state	<input checked="" type="checkbox"/>
Weston, George	george@test.ocm	GW	GW	Partner	Test Firm 1007, state	<input type="checkbox"/>

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.

By default, all the timekeepers for this OFFICE are selected.

## Submit Timekeepers (Manually Added without rates)

To submit the timekeeper information without rates for client authorization.

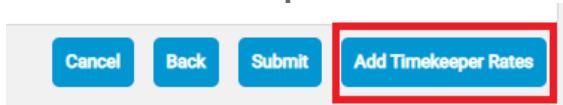
Click **Submit**.

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

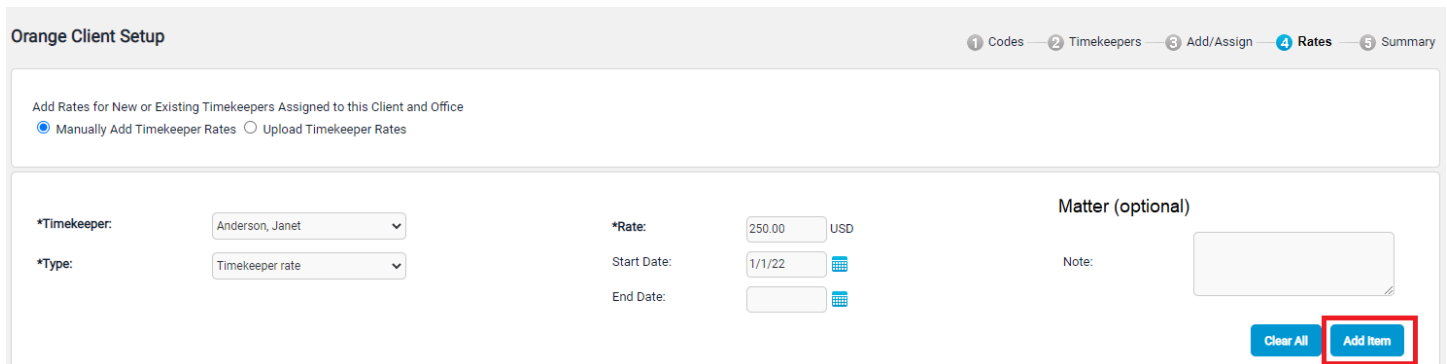
**End Date:** optional

**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.

Search:

<input type="checkbox"/>	Item No	Timekeeper	Type	Task Code	Matter	Currency	Rate	Start Date	End Date	Note	Edit
<input type="checkbox"/>	1	Anderson, Janet	Timekeeper rate	---	---	USD	250.00	1/01/22	---		
<input type="checkbox"/>	2	Dodds, Steven	Timekeeper rate	---	---	USD	245.00	1/01/22	---		

Show

10

▼

entries

Showing 1 to 2 of 2 entries

Previous

1

Next

Delete checked items

Cancel

Back

Next

### 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.

**Orange Client Setup** 1 Codes 2 **Timekeepers** 3 Add/Assign 4 Rates 5 Summary

Next, you will need to add at least one timekeeper in order to proceed. Select an option:

**Assign/Add New:** Use this option if your Timekeepers are already in the system; you will be able to select one or more to assign to this client. You can also manually type in a few new Timekeepers. You can always add more Timekeepers later.

**Upload New Timekeepers:** Use this option if you have downloaded and filled in the Sample Timekeepers 4.0 CSV file and are ready to upload it. You can always add additional Timekeepers later using the upload file.

Collaborati uses a specific format to define Timekeeper attributes, such as Timekeeper Name, Classification (or category), ID, Display Code, and Client Specific Profiles. You can download this format from the link below.

[Download Sample Timekeepers 4.0 File](#)  
tk.csv(0.5Mb) - Comma Separated Value (CSV) file

Timekeepers:

☐ Assign existing and/or add new timekeepers

☒ Upload new timekeepers

No file chosen

☐ Overwrite existing timekeeper profiles ⓘ

**Cancel Back Next**

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

**Orange Client Setup** 1 Codes 2 Timekeepers 3 **Add/Assign** 4 Rates 5 Summary

You have successfully uploaded the timekeepers information. Click "Add Timekeepers Rates" to add the rates information (or) click "Submit" to review and submit the timekeeper(s) information without rates. Click "Back" and upload a new file to modify the timekeepers information.

**Search Filters**

Name:  Email:  Timekeeper ID:  Classification:  Home Office:

Name	Email	Display Code	Timekeeper ID	Classification	Home Office	Status
Anderson, Janet	janet@test.ocm	JA	JA	Partner	Test Firm 1006, state	New Record
Dodds, Steven	steven@test.ocm	SD	SD	Associate	Test Firm 1006, state	New Record

### Submit Timekeepers (Uploaded without rates)

To submit the timekeeper information without rates for client authorization.

Click **Submit**.

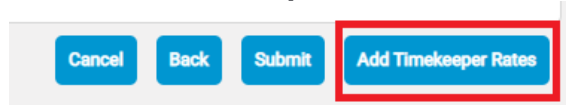
**Cancel Back Submit Add Timekeeper Rates**

View the [Summary](#) without Rates.

## 4B Add Timekeeper Rates (Uploaded with rates)

To add timekeeper rates to the timekeepers.

Click **Add Timekeeper Rates**.




Cancel Back Submit **Add Timekeeper Rates**

---

Orange Client Setup 1 Codes — 2 Timekeepers — 3 Add/Assign — **4 Rates** — 5 Summary


Add Rates for New or Existing Timekeepers Assigned to this Client and Office

☐ Manually Add Timekeeper Rates ☒ Upload Timekeeper Rates



**Upload Timekeeper Rates**

- You can upload a file containing a set of timekeeper rates. Collaborati uses a specific format to define timekeeper rate attributes, such as start date, end date, timekeeper rate, notes, etc. The fields required for upload are: timekeeper identity, category (and taskCode if category is "Invoice task rate"), currency, and rate. Matter Number is an optional field used for Matter Level Rates: your client may or may not accept this Rate Type. You can download this format from the link below.
  - Note: Timekeeper identity uses a unique identifier for the file upload tool based on the Firm Settings set by the Firm Admin User as either "Timekeeper Display Code" or "Timekeeper ID". For any help, reach out to Collaborati Firm Admin.

 [Download Sample Timekeeper rate file](#)

- Next, click "Choose File" to select the file to upload from your computer.
- Next, click "Upload" to upload the selected file.
- Click "Next" to preview the uploaded timekeeper and rate information.
- To upload a different file, click "Choose File" and Upload again. If no changes need to be made, click "Next" to go to Summary page.

File to Upload:  No file chosen

Cancel Back Next

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.





**Orange Client Setup**

1 Codes — 2 Timekeepers — 3 Add/Assign — 4 Rates — 5 **Summary**

- You have completed the setup for Orange Client. To confirm these settings, please click "Submit" to request client verification. Once the client has verified these settings, you may begin submitting invoices.
- If modifications are needed prior to client submission, click "Cancel" to exit or click "Back" to return to previous sections.

Client Code (Client Id): **Orange**  
Codes: **145 selected**

Code	Internal Billing Code
E100	E100
E101	E101
E102	E102
E103	E103
E104	E104
E105	E105



Search:

First Name	Middle Name	Last Name	Email	Display Code	Timekeeper ID	Home Office	Classification	Rate Request Attached	Timekeeper Status
Janet		Anderson	@janet@test.ocm	JA	JA	Test Firm 1006, state	Partner	No	New Record
Steven		Dodds	@steven@test.ocm	SD	SD	Test Firm 1006, state	Associate	No	New Record

Show  entries  
Showing 1 to 2 of 2 entries

Previous  Next

Cancel

Back

Submit

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

Skip to [Setup Complete](#)



Verify the summary information listed on the screen.

1 Codes — 2 Timekeepers — 3 Add/Assign — 4 Rates — 5 **Summary**

Client Code (Client Id): **Orange client**

Code	Internal Billing Code
E100	E100
E101	E101
E102	E102
E103	E103
E104	E104
E105	E105

Previous 1 Next

Cancel Back Submit





# 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**”.




Clients

Select Office

Test Firm 1006 , state



Search:

Client Name	Location	Billing Contact Name	Technical Contact Name	Status	Quick Links
Orange Client	El Paso, TX, US	@ Support , Support		Waiting for Client Authorization	  

## 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 screenshot shows the 'Notifications' page in a web application. The top navigation bar includes links for Home, Invoices, Clients, Matters, Timekeepers, Budgets, Reports, Admin, Messages, Notifications (highlighted with a red box), Preferences, FAQ, Help, and Logout. Below the navigation bar, the 'Notifications' section is displayed. It contains two main sections: 'Office and Client Notifications' and 'Matter Notifications'. The 'Office and Client Notifications' section has a checkbox labeled 'Notify On New Office and Client Association'. The 'Matter Notifications' section is highlighted with a red box and contains a sub-section 'Notify on Matter Creation :'. This sub-section has two dropdown menus: 'Select Office:' and 'Select Client:', both set to 'Any'. Below these are 'Save' and 'Cancel' buttons. At the bottom of the 'Matter Notifications' section, there are tabs for 'Office', 'Client', and 'Delete', with 'Client' selected. Below the tabs is a table with the message 'No data available in table'.

**Notifications**

Office and Client Notifications

☐ Notify On New Office and Client Association

**Matter Notifications**

Notify on Matter Creation :

Select Office: Any

Select Client: Any

**Save** **Cancel**

Office **Client** Delete

No data available in table

Email Notifications

Select Office: Any

Select Client: Any

Select Matter: Any

	Invoices				Budget Requests			Tender Requests			Rate Requests				Timekeeper Records	
Select All	Approved	Adjusted	Rejected	Paid	New	Approved	Rejected	New	Approved	Rejected	Approved	Adjusted	Rejected	Error	Authorized	Unauthorized
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save

Cancel

Invoices

Budget Requests

Tender Requests

Rate Requests

Timekeeper Records

Office

Client

Matter

Approved

Adjusted

Rejected

Paid

New

Approved

Rejected

New

Approved

Not Selected

Approved

Adjusted

Rejected

Error

Authorized

Unauthorized

Actions

Search:

No data available in table

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

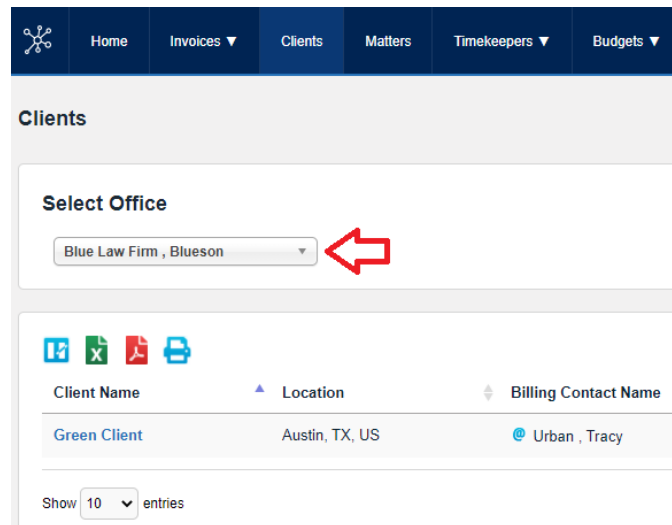
			Invoices				Budget Requests			Tender Requests			Rate Requests				Timekeeper Records		
Office	Client	Matter	Approved	Adjusted	Rejected	Paid	New	Approved	Rejected	New	Approved	Not Selected	Approved	Adjusted	Rejected	Error	Authorized	Unauthorized	Actions
Any	Any	Any	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	

More information about notifications can be found in our help guide [here](#).

Check out our Help guide for more resources: <https://success.mitrates.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).



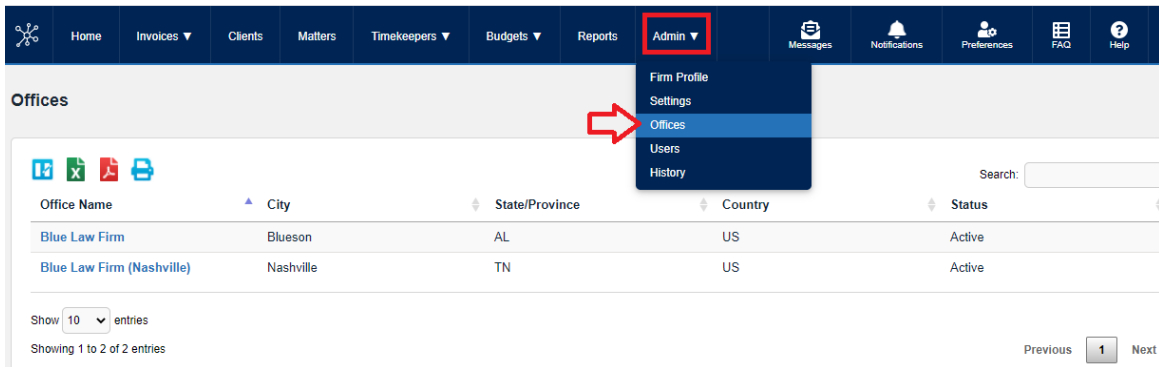
The screenshot shows the 'Clients' page in the Collaborati application. At the top is a dark blue navigation bar with icons and labels for Home, Invoices, Clients, Matters, Timekeepers, and Budgets. Below this is a light gray header for the 'Clients' section. A 'Select Office' dropdown menu is prominently displayed, with 'Blue Law Firm , Blueson' selected. A red arrow points to this dropdown. Below the dropdown is a table with columns for Client Name, Location, and Billing Contact Name. The table contains one entry: 'Green Client' located in 'Austin, TX, US' with billing contact 'Urban , Tracy'. At the bottom, there is a 'Show 10 entries' control.

Client Name	Location	Billing Contact Name
Green Client	Austin, TX, US	Urban , Tracy

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**

Office Name	City
Blue Law Firm	Blueson
Blue Law Firm (Nashville)	Nashville

View Office Profile here

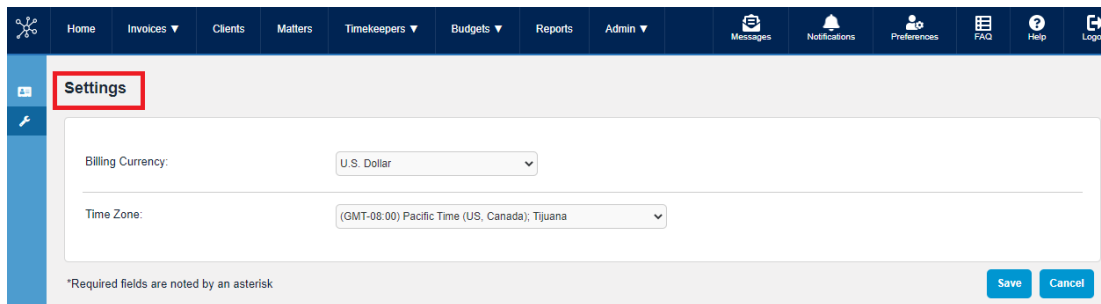
A screenshot of the 'Office Profile' form. On the left, there is a blue sidebar with a list of icons. A red arrow points to the edit icon (a wrench). The form contains the following fields:

- \*Office Name: Blue Law Firm
- \*Office Tax ID: 11-223344
- ☐ Enable checkbox if Office Tax ID is not applicable.
- \*Phone: 555-999-0000 (xxx-xxx-xxxx)
- \*Email: tracy.urban@mitratech.com
- Mailing Address**
- \*Country: United States
- \*Address 1: 333 Blue Dr
- Address 2:
- \*City: Blueson
- \*State/Province: Alabama
- \*Zip/Postal Code: 11223
- ☐ Enable checkbox if Zip/Postal Code is not applicable.
- Bank Account Information**
- Account Country: United States
- Account Title: Blue Accounting
- Account Number: 123456
- Routing Number: 654321

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

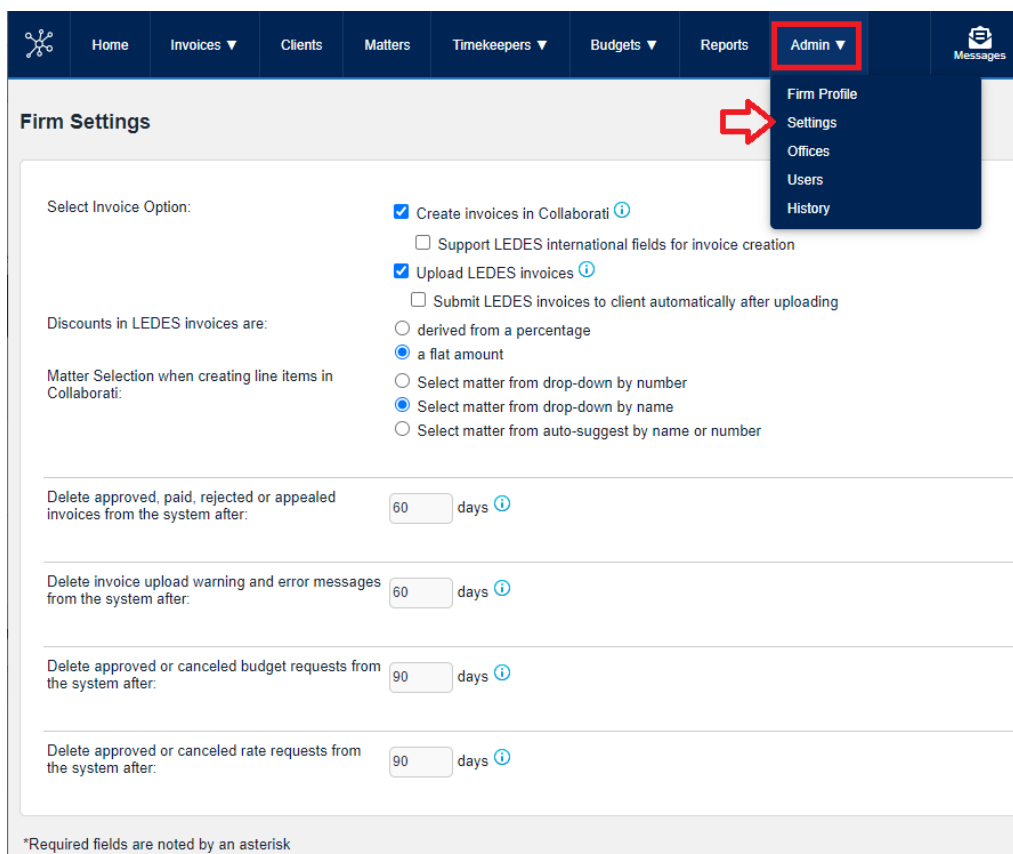
Click on the **Settings** icon in the left navigational bar.

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.

The screenshot shows the 'Firm Profile' page with the following fields and values:

- \*Firm Name:** Blue Law Firm
- \*Firm Tax ID:** 11-223344
- \*Phone:** 555-700-9999 (xxx-xxx-xxxx)
- \*Email:** tracy@mitratech.com (highlighted with a red arrow) and isabel@mitratech.com (with a trash icon and a plus icon to add more)
- Fiscal Year Start Date:** (empty field with a calendar icon)

#### 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

**Timekeepers Submitted with Rate Requests**

[Add Timekeeper with Rates](#) [Upload Timekeepers with Rates](#)

**Search Filters**

Timekeeper Name:  Timekeeper ID:  Classification:  Timekeeper Status:

Rate Request Name:  Rate Request Status:  Rejected/Adjusted Item Status:  Requested By:

Office:  Client:  Home Office:  Date Submitted:  to

Rate Request Last Changed By Client: ☐

[Clear](#)

Name	Email	Timekeeper ID	Request Name	Classification	Office	Home Office	Client	Timekeeper Status	Rate Status	Comments
Oddy, Axle	<a href="mailto:JNJto44@1.com">JNJto44@1.com</a>	JNJ_4	Rate request for Axle Oddy, 1AUSTIN TRAINING VENDOR - 03/14/2022 - 1:33 AM	Partner	1AUSTIN TRAINING VENDOR, Austin		Green Client	Authorized	Approved	
Soan, Oudie	<a href="mailto:JNJto43@1.com">JNJto43@1.com</a>	JNJ_3	Rate request for Oudie Soan, 1AUSTIN TRAINING VENDOR - 03/14/2022 - 1:33 AM	Associate	1AUSTIN TRAINING VENDOR, Austin		Green Client	Pending Client Authorization	Pending Timekeeper Authorization	

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)

**Home Invoices Clients Matters Timekeepers Budgets Reports Admin**

**Messages Notifications Preferences FAQ**

**Rates for Green Client**

Select Office

1AUSTIN TRAINING VENDOR...

**Office Rate**

**\$**

Rate	Matter	Start Date	End Date
Nothing found to display.			
Rate 0 - 0 of 0			

Rate per page: 10

**Timekeeper Rates**

Search:

Timekeeper Name	Timekeeper ID	Classification	Currency	Rate Type	Task Code	Matter	Rate	Start Date	End Date
Attorney, Joshua	SWJ	Associate	USD	Timekeeper Rate			\$180.00	9/01/18	9/30/18
Beatty, Allison	9656	Associate	USD	Timekeeper Rate			\$270.00	1/01/17	10/31/17

## 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).

Codes for Green Client

<< Return to list of clients

Select Office

Blue Law Firm , Blueson

Displayed are the billing codes for this client. You may select which codes you wish to use and enter corresponding codes from your internal time and billing system.

[Task Codes](#) | [Expense Codes](#) | [Activity Codes](#) | [Non-US Tax Codes](#) | [Internal Client Code](#)

Code	Description	Type	Use	Internal Billing Code
B110	B110 Case Administration	Task	<input checked="" type="checkbox"/>	B110
B120	B120 Asset Analysis and Recovery	Task	<input checked="" type="checkbox"/>	B120
B130	B130 Asset Disposition	Task	<input checked="" type="checkbox"/>	B130
B140	B140 Relief from Stay/Adequate Protection	Task	<input checked="" type="checkbox"/>	B140
B150	B150 Meetings of and Communications with Creditors	Task	<input checked="" type="checkbox"/>	B150
B160	B160 Fee/Employment Applications	Task	<input checked="" type="checkbox"/>	B160

### 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

**Create Invoice** 1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

\*Bill Invoice as: Blue Law Firm, Blueson

\*Invoice Number: 14679

\*Invoice Date: 11/11/20

Invoice Period: to

Invoice Total: 0.00 USD

Description: A general comment about the entire invoice.  
2000 characters maximum

\*Bill Invoice to: Green Client

Fee Arrangement: ☒ Standard ☐ Distributed Discount

Tax Type: ☒ US ☐ Non-US

Invoice Type: Standard

\*Required fields are noted by an asterisk

**Next**

- 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.

**Create Invoice** 1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

Matter	Item Type	TK	Date	Fee	Activity	Rate	Hrs	Discount	Amount
Alpha Matter	Fee	TA	11/11/20	B110	(None)	420.00	4.20	0.00	1,764.00

Total fee for time spent on matter in this invoice period.  
2000 characters maximum

☐ Taxable Item

**Add Item**

Search:

Item No	Matter	Item Type	TK	Date	Fee/Exp	Activity	Rate/Price	Hrs/Units	Disc	Amount	Edit
No data available in table											

Show 10 entries  
Showing 0 to 0 of 0 entries

**Delete checked items** Invoice Fees: \$0.00 Invoice Expenses: \$0.00 Line Item Total: \$0.00

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

## LINE ITEMS: Fees Complete

Search:

Item No	Matter	Item Type	TK	Date	Fee/Exp	Activity	Rate/Price	Hrs/Units	Disc	Amount	Edit
1	DISP-000065	Fee	TA	11/11/20	B110	---	420.00	4.20	(0.00)	1,764.00	<a href="#">Edit</a>

Show 10 entries  
Showing 1 to 1 of 1 entries

Previous **1** Next

[Delete checked items](#) Invoice Fees: \$1764.00 Invoice Expenses: \$0.00 Line Item Total: \$1764.00

## 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.

Create Invoice

1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

Matter: Alpha Matter Item Type: Exp TK: EXP Date: 11/11/20 Exp: E101 Price: 48.50 Units: 3.00 Discount: 0.00 Amount: 145.50

Total expense for time spent on matter in this invoice period. 2000 characters maximum

☐ Taxable Item [Add Item](#)

Search:

Item No	Matter	Item Type	TK	Date	Fee/Exp	Activity	Rate/Price	Hrs/Units	Disc	Amount	Edit
1	DISP-000065	Fee	TA	11/11/20	B110	---	420.00	4.20	(0.00)	1,764.00	<a href="#">Edit</a>

Show 10 entries  
Showing 1 to 1 of 1 entries

Previous **1** Next

[Delete checked items](#) Invoice Fees: \$1764.00 Invoice Expenses: \$0.00 Line Item Total: \$1764.00

## LINE ITEMS: Expenses Complete

Create Invoice

1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

Matter: Alpha Matter Item Type: Exp TK: EXP Date: 11/11/20 Exp: E101 Price: 0.00 Units: 0.00 Discount: 0.00 Amount: 0.00

Total expense for time spent on matter in this invoice period. 2000 characters maximum

☐ Taxable Item [Add Item](#)

Search:

Item No	Matter	Item Type	TK	Date	Fee/Exp	Activity	Rate/Price	Hrs/Units	Disc	Amount	Edit
2	DISP-000065	Exp	EXP	11/11/20	E101	---	48.50	3.00	(0.00)	145.50	<a href="#">Edit</a>
1	DISP-000065	Fee	TA	11/11/20	B110	---	420.00	4.20	(0.00)	1,764.00	<a href="#">Edit</a>

Show 10 entries  
Showing 1 to 2 of 2 entries

Previous **1** Next

[Delete checked items](#) Invoice Fees: \$1764.00 Invoice Expenses: \$145.50 Line Item Total: \$1909.50

- 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.

**Create Invoice** 1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

**Discounts**  
Apply discounts to: ☒ Fees & Expenses ☐ Invoice Total

Current Total Fees: \$1,764.00      Current Total Expenses: \$145.50  
Fee Discount:       Expense Discount:   
Subtotal: \$1,764.00      Subtotal: \$145.50

**Taxes**  
Tax(%):   
Tax will only be applied to line items that are marked taxable.

☐ Skip invoice attachments

Back Continue Later Next

- Click **Next** button

### 4 ATTACHMENTS

**Create Invoice** 1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

Click "Choose Files" to select a file to attach. You may attach files up to 20.0MB.

Choose Files

Uploaded By	File Name	Date Uploaded	File Size
No data available in table			

Showing 0 to 0 of 0 entries

Back Continue Later Next

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

**Create Invoice** 1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

Click "Choose Files" to select a file to attach. You may attach files up to 20.0MB.

How to Create a Manual Invoice.pdf  
Attach Files

Uploaded By	File Name	Date Uploaded	File Size
No data available in table			

Showing 0 to 0 of 0 entries

Back Continue Later Next

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

The attached document will appear in the attachment section.

**Create Invoice** 1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

Click "Choose Files" to select a file to attach. You may attach files up to 20.0MB.

[Choose Files](#)

Search:

Uploaded By	File Name	Date Uploaded	File Size
Roseann Tiongco	<a href="#">How to Create a Manual Invoice.pdf</a>	11/12/20	123 KB

Showing 1 to 1 of 1 entries

[Back](#) [Continue Later](#) [Next](#)

- Click **Next** button

## 5 PREVIEW Completed Invoice

**Create Invoice** 1 Header 2 Line Items 3 Taxes & Discounts 4 Attachments 5 Preview & Submit

[Printable View](#) [Submit to Client](#) [Submit Later](#) [Delete](#)

• This Invoice has been saved. You may submit it at a later date by going to the [track invoices](#) page.

**Blue Law Firm**  
333 Blue Dr  
Blueson, AL 11223

**Invoice**

Invoice Date	Invoice No	Fee Arrangement	Invoice Type	Reference Number	Tax Type	Currency	Period
11/11/20	14679	Standard	Standard		US	USD	-

**Bill To**  
Green Client  
5001 Plaza on the Lake  
Austin, TX 78731

**Details**  
Tax ID  
PO No  
Account Type

**Description**  
A general comment about the entire invoice.

[Edit Header](#)

No	Attachment
1	<a href="#">How to Create a Manual Invoice.pdf</a>

[Edit Attachments](#)

Fees		Expenses		Total	
Amount	1,764.00	Amount	145.50	Amount	1,909.50
Discount	0.00	Discount	0.00	Discount	0.00
Sub-Total	1,764.00	Sub-Total	145.50	Sub-Total	1,909.50
Tax	0.00	Tax	0.00	Tax	0.00
Total	1,764.00	Total	145.50	Total Due	1,909.50
Tax: 0.00%					

[Edit Taxes & Discounts](#)

[Edit Line Items](#)

No	Matter	TK	Date	Description	Rate/Price	Hrs/Units	Disco*	Total
1	DISP-000085	TA	11/11/20	Fee Code: B110 B110 Case Administration Total fee for time spent on matter in this invoice period.	420.00	4.20	0.00	1,764.00
2	DISP-000085	EXP	11/11/20	Expense Code: E101 E101 Copying Total expense for time spent on matter in this invoice period.	48.50	3.00	0.00	145.50

Line Items 1 - 2 of 2

\* Reflects both line item and invoice level discounts

Line Items per page: 10 [Edit Line Items](#)

## 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.

Recent Activity				
<div>Select Office</div> <div>Blue Law Firm , Blueson</div>				
<div> </div>	File Name	Date Uploaded	Attachments	File Status
<div> </div>	ledes_01.txt	11/09/20	<div> </div>	Ready To Submit
				<div> <div>Submit</div> <div>Delete</div> </div>

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

Attach Files

ledes\_01.txt

Invoices: 3447

Choose Files

Search:

Uploaded By	File Name	Date Uploaded	File Size
No data available in table			

Showing 0 to 0 of 0 entries

Close

Once you have uploaded your document, click on Close.

Attach Files

ledes\_01.txt

Invoices: 3447

Choose Files

Search:

Uploaded By	File Name	Date Uploaded	File Size
Aiman Khan	Attach a Document to a LEDES File.pdf	11/10/20	239 KB

Showing 1 to 1 of 1 entries

Close








Your Attachment is indicated by a blue Paperclip icon



Recent Activity

Select Office

Blue Law Firm, Blueson

File Name	Date Uploaded	Attachments	File Status	Actions
     ledes_01.txt	11/09/20	 	Ready To Submit	<a href="#">Submit</a> <a href="#">Delete</a>

Show 10 entries  
Showing 1 to 1 of 1 entries

Previous 1 Next

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”.