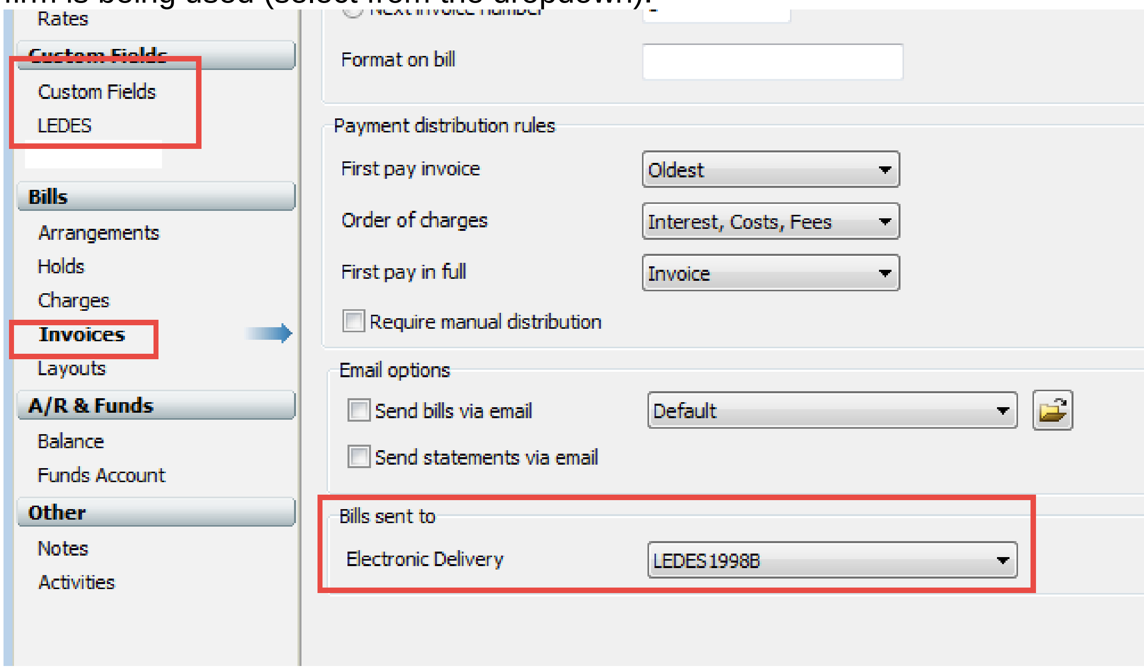
ELECTRONIC BILLING (LEDES, ETC.):

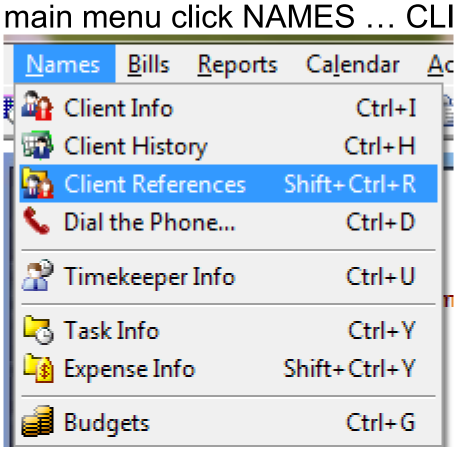
Setting up the Client:

Clients who require electronic billing such as Serengeti or LEDES need to be set up as follows:

1. The Client Information Custom Fields sections will require certain information based on the client
2. The Client Information “Invoices” section must show which electronic delivery firm is being used (select from the dropdown).



3. Each client must also be assigned to require L codes as follows: From the top main menu click NAMES … CLIENT REFERENCES



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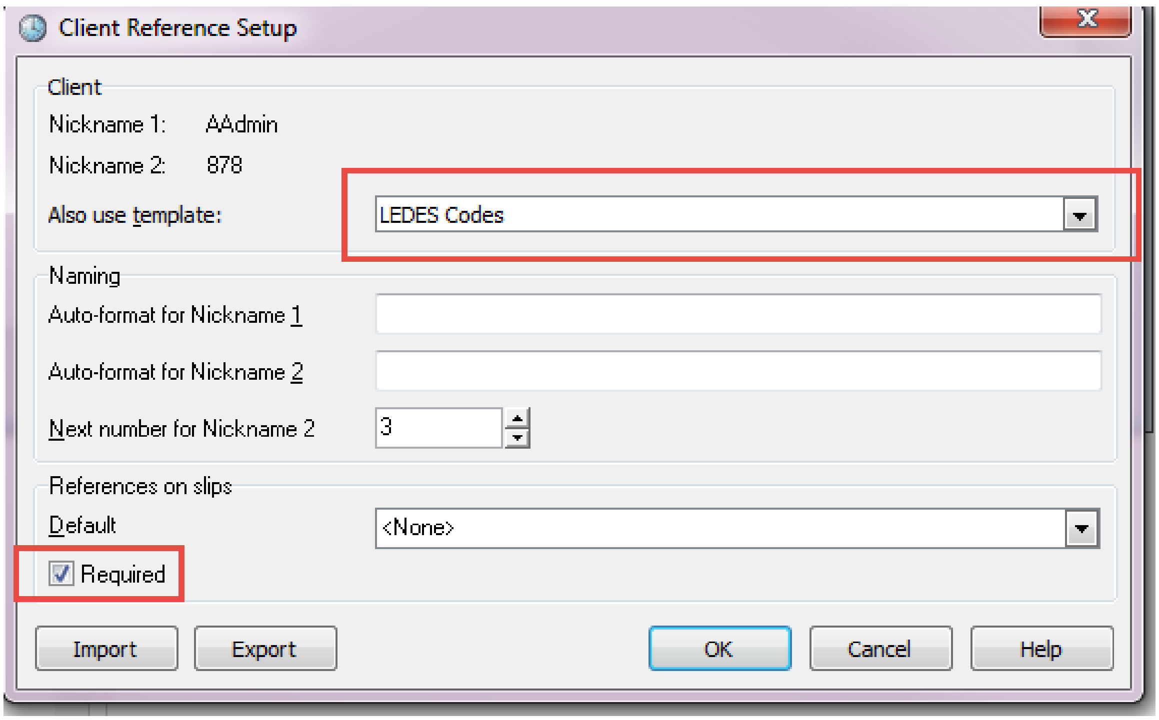
4. Open the client and click the OPTIONS button on the right:

5. Choose the correct template from the drop-down and check the “Required” box and then click OK.



Creating the Electronic Bill

1. Generate the bill and put it into PROOF stage
2. From the top menu click BILLS … SEND BILLS TO AUDIT HOUSES
3. Place a checkmark next to the bills to be sent to the audit house
4. Click the EXPORT button to create the file
5. Move the bills to audit stage
6. Use the file created in step 4 to upload to the audit house
7. When the bill is accepted, approve the bill

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