

Brightflag: July Vendor Webinar

Wednesday July 27th, 2022

brightflag

Agenda



User Management and Permissions



Timekeepers



Invoice Rejection



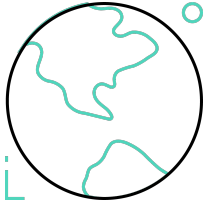
Invoice Resubmission



Q&A

User Management

Brightflag Roles and Permissions



Vendor Admin

- View all offices
- View all invoices
- View all matters
- Add and manage users
- View and submit timekeeper rates
- View and submit accruals



Vendor Office Admin

- View all office invoices
- View all office matters
- Add users
- View and submit timekeeper rates
- View and submit accruals

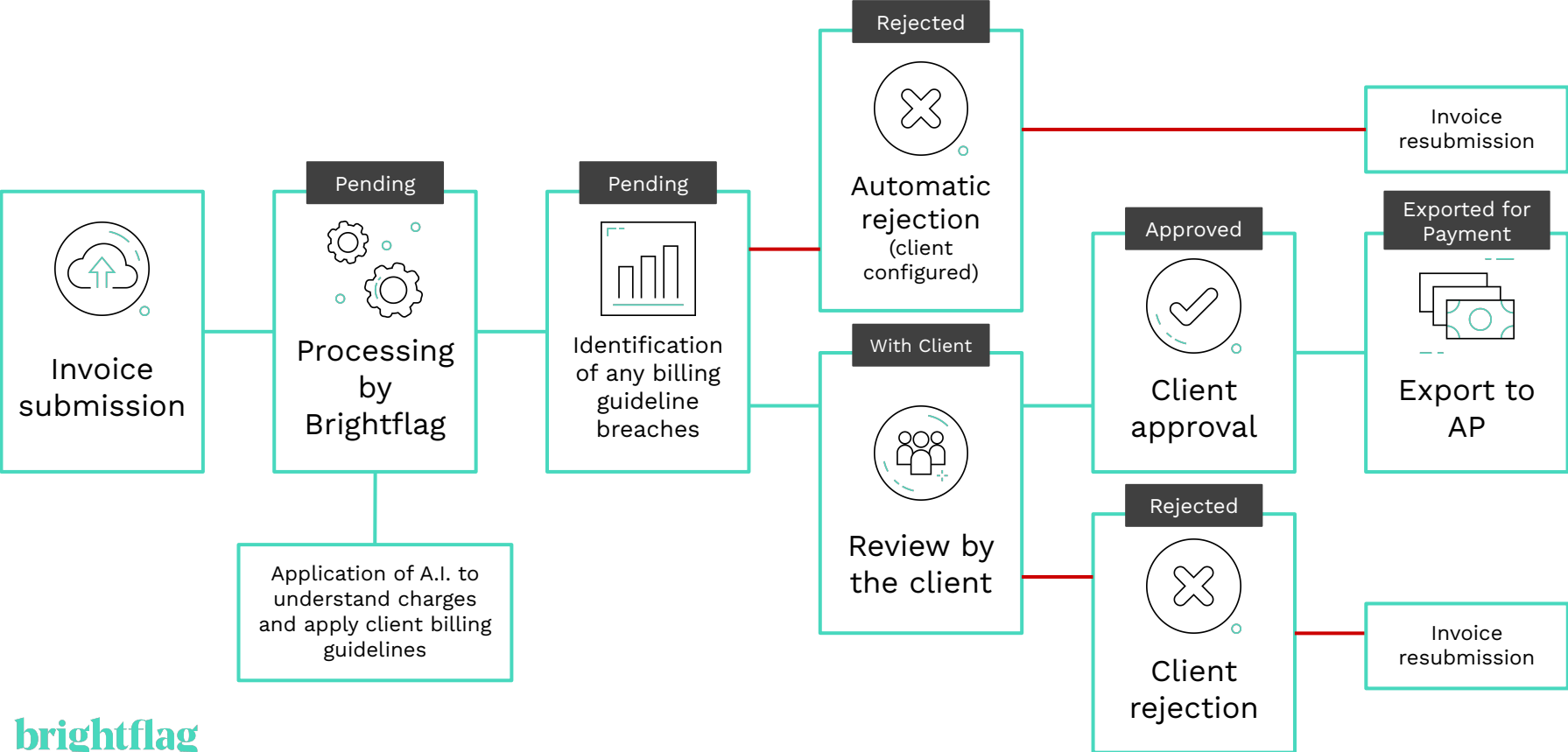


Standard User

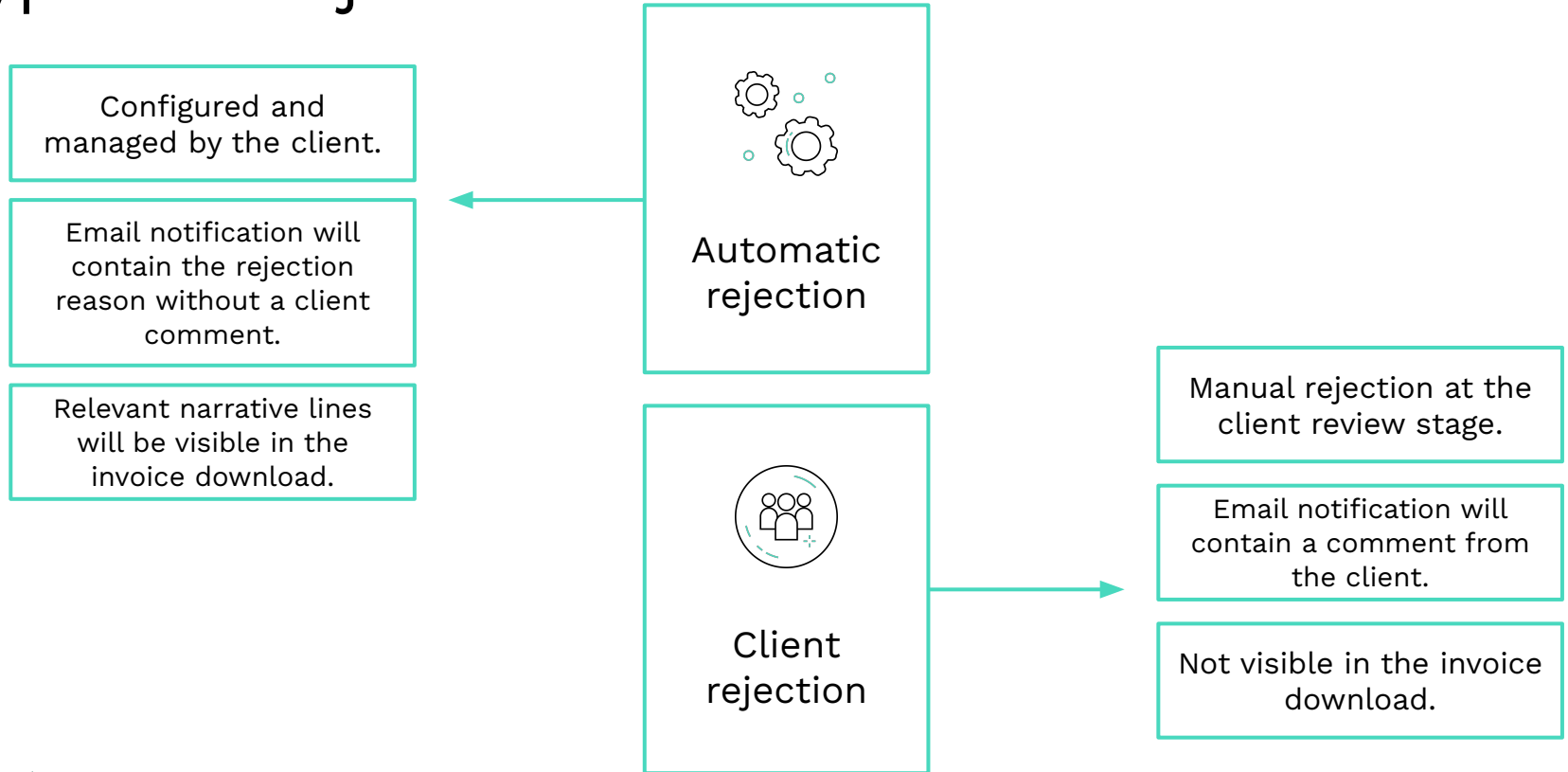
- View invoices you have uploaded
- View invoices that were shared with you
- View matters that you have been added to
- Submit accruals on matters you that you have been added to

Invoice Rejection

What does the process look like?



Types of Rejection



Reasons for invoice rejection: Mismatching Fees



Rejection where one or more of the following items inputted to Brightflag do not match the PDF invoice

Net Fees

Discount

Expense
Total

Currency

Tax

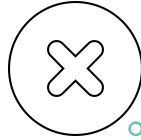
Invoice Total

Reasons for invoice rejection: Errors



Time Entry Calculation Error

- The hourly rate multiplied by the hours worked does not match the total



Incorrect Gross Invoice Total

- The calculation of the net fee minus expenses, discounts, and tax is incorrect



Discrepancy in Invoice Fee Totals

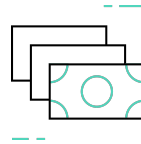
- The calculated total of all narrative lines on an invoice does not match the net fee on the invoice

Reasons for invoice rejection: Direct Breaches



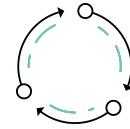
Prohibited Expenses

- Charges on an invoice that the customer would consider to be a law firm overhead
- E.g. printing, copying, online research, word processing



Administrative Support Costs

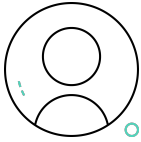
- Any references to activities such as printing, copying, scanning, redacting, document management, etc.
- Not listed as an expense



Billing Process

- Charges for time spent preparing invoices, communicating in relation to billing queries, or using Brightflag

Reasons for invoice rejection: Rates



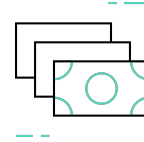
New Timekeeper

- A new timekeeper who has not been approved on Brightflag is detected on an invoice



Rejected Rate Request

- A timekeeper whose rate was rejected by the client on Brightflag is detected on an invoice



Timekeeper Rate Increase

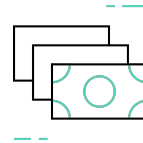
- The system has detected an increase in an approved timekeeper's rate

Reasons for invoice rejection



Participation at meetings or on calls

- Charges for more than one timekeeper attending the same meeting or call



Block Billing

- Multiple activities being billed within a single narrative line

Viewing Rejection Details or Adjustments

Demo

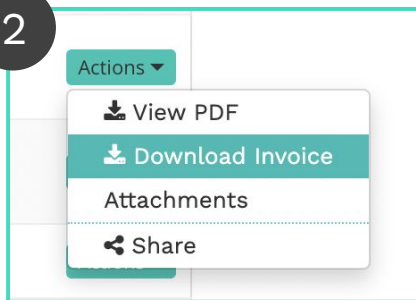


Viewing Rejection Details or Adjustments

1

Matter Name	Client Matter ID	Firm Matter Ref	Invoice No.	Invoice Date	Submission Date	Invoice Total	Client Contact	Law Firm Contact	Status	Rejection Note	Upload Note	Resolution of Rejection ?	Attachments	Actions
Project Jupiter	BF_M#181621	N/A	260722	Jul 07, 2022	Jul 26, 2022	USD 16,250.00		Niamh Ryan	Rejected			Click to add Resolution Note		Actions
ABC V Lightning Inc.	BF_M#181620	N/A	154376	Jul 14, 2022	Jul 14, 2022	EUR 1,100.00		Niamh Ryan	Pending					Actions

2



In this spreadsheet download, you will be able to view:

- Adjustments/Reductions at the narrative line level
- Adjustment/Reduction comments from the client
- Rejection reasons at the narrative line level (if your invoice was auto-rejected)

Invoice Resubmission

Ensure you link revised/amended invoices to the previous draft at resubmission:

PDF

Matter Search

Project Jupiter - BF_REF_7 - BF_M#181621

Matter Purchase Order

PO REF - 132453


Is This a Resubmitted Invoice?

No Yes

Link to Invoice ⓘ

Invoice

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Errors/Warnings	Actions
No Errors	<div style="display: flex; align-items: center; gap: 10px;"><div style="border: 1px solid teal; padding: 2px 5px;">Edit</div><div style="border: 1px solid black; border-radius: 50%; padding: 5px; display: flex; align-items: center; justify-content: center; width: 20px; height: 20px; background-color: red; color: white;"></div><div style="padding: 2px 5px;">✕ Delete</div></div>

LEDES Submission

