

E-Billing Product Plan Breakdown

	Definitions	Starter	Signature
E-Billing And Spend			
Multi-currency and tax	Support for more than 1 currency and tax jurisdiction	✓	✓
Multi-format invoices (PDF, LEDES, digital)	Ability to ingest multiple invoice formats	✓	✓
Financial allocations	Support and enforce financial allocations	✓	✓
Smart invoice rules (AI)	AI-powered invoice review (SimpleReview)	✓	✓
Billing guidelines enforcement	Invoice validation rules (standard + configurable)	✓	✓
Purchase orders	Ability to ingest purchase orders	✓	✓
Invoice approval rules	<p>"Set and enforce who can approve invoices based on conditions including:</p> <ul style="list-style-type: none"> -Monetary threshold rules -Matter-specific approval chains -Sequential, parallel, and multiple approvers -Approval authority escalations based on dollars (all approvers, highest-level approver, or none) -Auto approvals -Specific approvers based on conditions you set, like custom attributes -Team approvals" 	✓	✓
Alternative fee arrangements	Enforce legal fee arrangements for billing outside a traditional hourly rate.	—	✓
Accruals management	Automated collection and processing of financial accruals	—	✓
Budgets	Ability to create internal budgets	—	✓
Budget requests	Ability to collaborate on external budgets	—	✓

	Definitions	Starter	Signature
Matters			
Matter templates	Create custom templates for different matter types	3	Unlimited
Custom fields	Support for custom fields (or attributes)	20	Unlimited
Matter relationships	Create system relationships for multiple related matters (parent/child/sibling)	✓	✓
Matter groups (Practice Areas)	Group matters by type	✓	✓
Matter tracking	Ability to track matters through its lifecycle within the system	✓	✓
Confidential matters	Ability to keep confidential matter information secret or private	—	✓

Vendors			
CounselGO (vendor collaboration portal)	Ability for law firms to access and use vendor portal (submit invoices, budgets, TK management, matter collaboration, etc.)	✓	✓
Timekeeper validation	Automated validation of law firm timekeeper rates on submitted invoices	✓	✓
Timekeeper management	Submit and approve law firm timekeeper rates at the vendor level	✓	✓
Diversity tracking and reporting	Track diversity at law firms	—	✓
Vendor groups	Group vendors together within system (i.e. select satellite offices combined w/ HQ for budgeting/reporting purposes)	—	✓
Vendor surveys	Ability to survey in-house team for feedback on law firm performance	—	✓
External collaboration with a vendor on files	Collaborate externally with a law firm on non-matter files	5 files	Unlimited
Copy shared files	Ability to copy non-matter files that have been shared by vendors	—	✓
Download shared files	Ability to download non-matter files that have been shared by vendors	✓	✓

	Definitions	Starter	Signature
Reporting and Analytics			
Standard reports (real-time)	Access to out-of-the-box, real-time report library	✓	✓
Ad-hoc reports	Ability to create ad-hoc reports	✓	✓
Enhanced reports (snapshot)	Access to enhanced reporting capabilities (create new reports, tailor existing reports, access to more data and analysis capabilities)	✓	✓

Support			
Access to customer success team	Access to CS team	✓	✓
Live webinar and on-demand training	Access to user trainings	✓	✓
Online knowledge base	Access to online help center	✓	✓
Law firm / vendor support	Technical support for law firms, free of charge	✓	✓
Email support	Email support for customers	✓	✓
In-app guidance	Guidance for new functionality and features within the SimpleLegal application	✓	✓
Live chat	Live chat support for customers	—	✓
Annual success planning	Dedicated time with Success to review goals and plan how to get there	—	✓

	Definitions	Starter	Signature
Account Overview and Setup			
Bulk actions	Execute changes and updates across multiple records in the system	✓	Unlimited
Address book	Store and find contact information of billing and matter stakeholders	✓	Unlimited
Vendor setup	Initial vendor setup in system and onboarding	✓	✓
User management	Create and manage SimpleLegal users (role, notifications, login, etc.)	✓	✓
User teams	Manage user teams and their permissions	—	✓
Conditional custom attributes	Associate 2 or more custom fields together so they are dependent on each other	—	✓
Permissions	Manage permissions for individual user access	Basic: Role-based	Advanced: Matter-level
Storage	Storage limits for all documents (general and matter files)	Starter 500GB max	Signature 3TB max

Add-ons			
Custom reports	Reports built specifically for an individual customer	Add-on	Add-on
SimpleLegal API	Access to SimpleLegal's REST API	Add-on - 10K transactions per month per API token	Add-on - 10K transactions per month per API token
Third party integrations	Integrations with other applications like AP, ERP, time tracking, IP management, etc.	Add-on	Add-on
Sandbox environments	Test environment for customers to test changes prior to them going live in production	Add-on	Add-on
Single sign on (SSO)	Apply SSO for easy login and greater security	Add-on	Add-on
"Single tenant environment (dedicated environment)"	Host SimpleLegal on a distinct software instance running on infrastructure that is not shared with other customers	—	Add-on
"Historical data migration (service only; one-time charge)"	Migrate historical data from prior e-billing solution into SimpleLegal	Add-on	Add-on