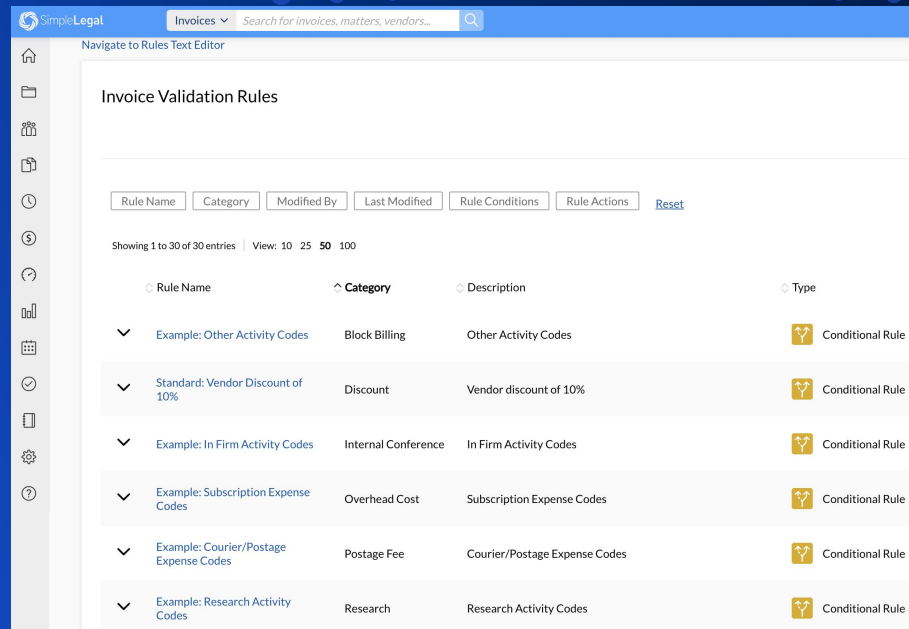


# Invoice Reviews

Streamline Legal Billing  
with AI-Powered  
Invoice Review

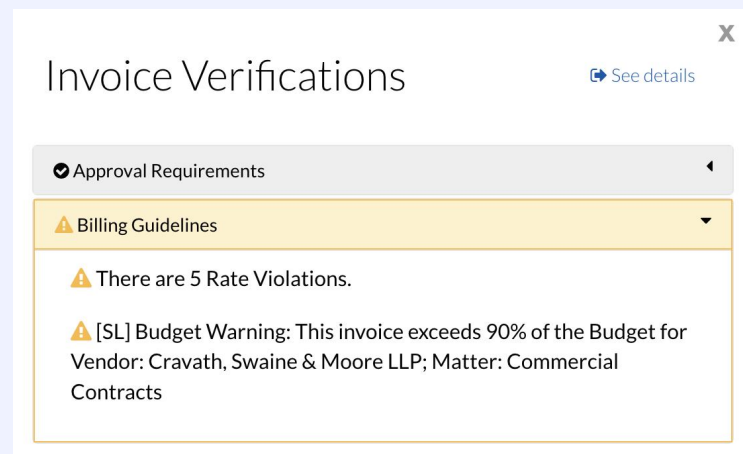


## Efficiently Validate Legal Invoices with AI-Driven Review and Smart Rules

Reviewing legal invoices for accuracy and compliance is time-consuming and prone to errors, diverting attention from higher-value legal work. SimpleLegal simplifies this process with two tools: Invoice Validation Rules and AI-Powered Invoice Review. These solutions, used together or separately, automate and improve invoice reviews, reducing manual effort and increasing efficiency for legal teams.

### Invoice Validation Rules

SimpleLegal's Invoice Validation Rules automate and streamline the entire invoice process, boosting efficiency and saving time and costs. Legal teams can create complex billing guidelines and approval workflows using a customizable rules engine, ensuring greater control and quick adjustments.



# Accelerate invoice review and enforce compliance with IVR

IVR enforces compliance with these rule types:

## Guidelines

- Specific to practice area or matter group
- Expense violations based on code and keywords
- Validate timekeepers
- Validate and adjust activity/task/expense codes
- Validate and adjust line-item totals or rates
- Vendor timekeepers & rates
- Matter-specific timekeepers & rates
- Vendor rate cards per classification
- Matter-specific rate cards

## Discounts

- Static discounts
- Volume-based tiered discounts

## Alternative Fee Arrangements (AFAs)

- Fixed or flat fees
- Fixed total costs
- Task-based fees
- Blended rates
- Volume discounts
- Vendor rate cards per classification
- Matter-specific rate cards

## Customizable Invoice Lists Lead to Improved Management

Further streamline your invoice workflow by applying necessary filters in the Invoice List page under “Add Columns” to easily track, view, and organize invoice data, improving financial oversight and saving time.

The screenshot displays the SimpleLegal Invoices interface. At the top, there are summary cards for 'Received' (\$856,666) and 'Hold' (\$19,062). Below these are filter buttons for 'Approvers', 'Received Date', 'Invoice Date', 'Matter', 'Vendor', 'Amount', 'Violation', and 'Reset'. The main table shows 8 entries, with columns for 'Approvers', 'Received Date', 'Invoice Date', 'Invoice Number', 'Vendor', 'Amount', 'Violation', 'Approvable', 'Invoice Adjustments', and 'Invoice Res'. The table is currently showing 1 to 8 of 8 entries.

Approvers	Received Date	Invoice Date	Invoice Number	Vendor	Amount	Violation	Approvable	Invoice Adjustments	Invoice Res
CU, CK, NY	7/19/2024	7/19/2024	Invoice with attachments	serhiv	\$6.00		Yes	\$0.00	No
CU, FL	5/23/2023	2/25/2008	96543	DF	GBE1,450.00	▲	Yes	GBE0.00	No
CU, MC	4/13/2023	4/13/2023	Notes Testing	Ziff and Diff	\$5,000.00	▲	Yes	\$2,000.00	No
CU, SA	2/28/2023	2/28/2023	02282023BB1	Lola Vendor	C\$1,800.00		Yes	C\$0.00	No
CU	2/10/2023	2/10/2023	02102023A1	Lola Vendor	\$8,920.00	▲	Yes	\$892.00	No
CU, BR, LS +1	2/1/2023	1/1/2023	Copy of Copy of 12345	DF	\$2,000.00		Yes	\$0.00	No
CU, M	2/1/2023	2/1/2023	Copy of 999	DF	\$2,000.00		Yes	\$0.00	No
CU, LS	2/1/2023	2/1/2023	999	DF	\$2,000.00	▲	Yes	\$40.00	No

# AI Powered Invoice Review that continuously learns

AI-Powered Invoice Review uses advanced AI models with machine learning and natural language processing to analyze the context of invoices and line items. As it processes more data, the AI continuously improves, allowing it to accurately detect common errors and violations like overbilling, duplicate charges, or non-compliance with billing guidelines. By highlighting only invoices that require human attention, it reduces the burden of manual invoice reviews and ensures accuracy in billing.

## Benefits that make a real impact

AI-powered Invoice Review is ideal for legal teams seeking to ensure vendors are billing accurately for approved work and expenses. This technology also provides additional benefits that enhance the invoice review process:

Approver	Received Date	Invoice Date	Invoice Number	Matter	Vendor	Amount	Violation
me	10/12/2024	10/17/2024	259823	IP 704	Gibson, Dunn & Crutcher LLP	\$5,252.95	me
me	10/12/2024	10/17/2024	129789	Public Policy 708.2	Kirkland & Ellis LLP	\$2,858.00	me
me	10/12/2024	10/17/2024	772535	Public Policy 345.7	Sullivan & Cromwell LLP	\$11,085.00	me
me	10/12/2024	10/17/2024	72345	Patent C1988	Skadden, Arps, Slate, Meagher & Flom LLP and Affiliates	\$9,225.00	me
me	10/12/2024	10/17/2024	48235677	Investigations C2893	Kirkland & Ellis LLP	\$11,429.90	me
me	10/12/2024	10/17/2024	235345	Investigations 24-9	Sullivan & Cromwell LLP	\$6,157.35	me



### Targeted Invoice Reviews

Flags invoices with high error potential, guiding attorneys to focus their review efforts and reducing the time spent on audits.



### Time Saved

Handles the heavy lifting of invoice reviews, allowing attorneys to concentrate on other legal tasks that support organizational goals.



### Enhanced Billing Process

Flags will surface common issues and provide data to help improve billing guidelines and vendor management.



### Improved Billing Practices

Identifies invoice issues, such as vague or block billing, providing data that can lead to better invoicing practices and greater transparency into the work performed by law firms.



### Maximized Savings

Detects violations that might be overlooked since every invoice is thoroughly reviewed.

# AI Powered Invoice Review brings context to invoice line items

Deciding whether to approve an invoice is now easier for the legal department. While IVR effectively identifies specific issues, it doesn't grasp the context of line items before flagging them.

Here's how AI-Powered Invoice Review improves automated invoice reviews by adding contextual understanding:

## The scenario:

A customer sets up an IVR postage rule to flag any line item containing the keyword "FedEx," as their department policy prohibits payment for FedEx shipping.

Customer receives these line items:

- **Line item 1:**

IVR would trigger a AI Powered Invoice

Send documents via FedEx (tracking # 2349832498237498)

- **Line item 2:**

File deposition documents for FedEx hearing

## The results:

### Invoice Validation Rules

IVR flags both line items containing the keyword "FedEx," but this is incorrect as line item 2 has nothing to do with postage.