



# Invoice Validation Rules Training

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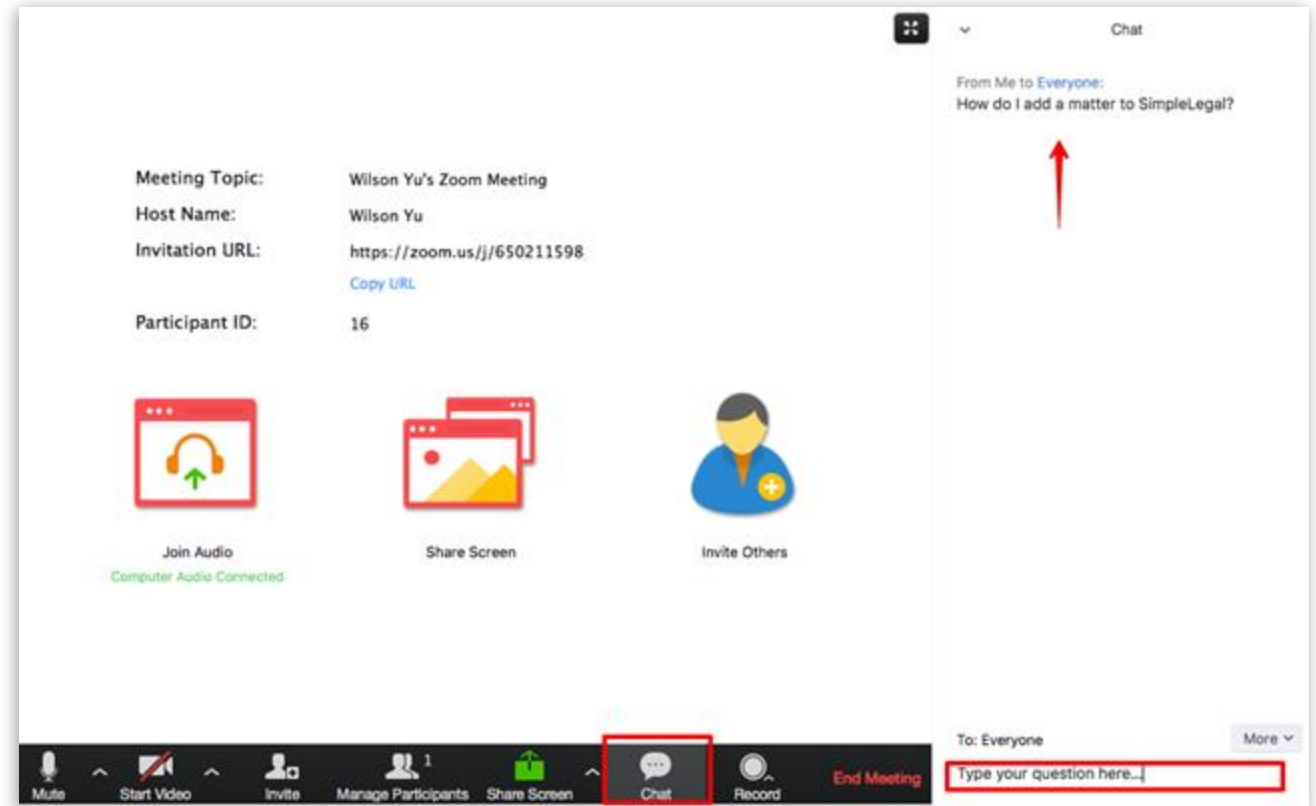
# Hi, I'm Kinda! 🤝

- Customer Education Manager
- Based in Houston, TX



# How to participate

- Your audio is muted
- Use the Q&A function to ask questions
- Training is recorded and a link will be sent to you along with the slides





By the end of this training, you'll be able to:

- **Use invoice validation rules** to streamline the invoice review process
- **Customize and activate** an existing invoice validation rule
- **Create** a new invoice validation rule

## Learning Goals

# Reflect

How are you currently enforcing billing guidelines with your vendors?

Share your thoughts in the chat!



# Why Invoice Validation Rules

As a legal team member, you may be facing various challenges:

- Struggle to enforce billing guidelines with your vendors
- Unsure if vendors are complying with the stated guidelines and how to enforce them, if not.

**Invoice validation rules automatically catch invoice violations according to the billing guidelines you set, saving you time in manual invoice reviews.**

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# Examples of Invoice Validation Rules

Basic Rules	
Use Case	Example of a Rule
Flag / Reject Expense Codes, Task Codes, and /or Activity Codes	Reject E101
Flag Keywords	If the line item is an expense, flag if line item or invoice if the words "copy" and "copies" appear
Advanced Rules	
Use Case	Example of a Rule
Vendor Discount	Vendor DLA Piper needs to apply a 10% discount to all hourly fees.
Tiered Discount	Our standard discount with Ropes & Gray is 5%. Once our annual spend with them exceeds \$10M, the discount goes up to 7.5%. If our annual spend exceeds \$20M, the discount goes up to 10%. Flag invoice is correct tired discount is not applied
Validating against specific attributes on the matter of vendor	A vendor needs to bill in a specific currency. Flag the invoice if it is submitted in a different currency
Prevent Parent Line Item Codes from Submission	Flag if L100 is used. Firms should be submitting codes like L110, L120, etc
Negative Amount Flag	Flag if there is a line item <0
Fee / Expense code required	If expense code line type, and expense code is blank, Flag invoice or line item
Specific Code Set not allowed	Flag any invoice with Task Codes that contain "D"

**Demo**

# Session outline

	Topic	Details
1	Introduction to Invoice Validation Rules (IVR)	Overview of rules and benefits of using IVR
2	Examples of IVR	<ul style="list-style-type: none"><li>• Basic Rules</li><li>• Advanced Rules</li></ul>
3	Customize and activate an existing rule	<ul style="list-style-type: none"><li>• Inactive rules overview</li><li>• Using the rules editor</li></ul>
4	Create a new rule	<ul style="list-style-type: none"><li>• Determine rule needs</li><li>• Conditions vs. Actions</li><li>• Activate the rule</li></ul>
5	Manage existing rules	<ul style="list-style-type: none"><li>• Filter and sort rules</li><li>• Download rules</li><li>• Clone rules</li></ul>

# Additional Resources

- Check out the [Invoice Validation Rules Success Kit](#)
  - Access the SimpleLegal **help center** for articles on how to use [Invoice Validation Rules](#) (make sure to be logged in).
  - Attend an upcoming [Invoice Validation Rules Office Hours](#)
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# Reflect

Can you name 1 thing you learned today that you found particularly useful?

Share your thoughts in the chat



**Questions?**