

CREATE A BUDGET INSTRUCTIONS

Your Client may **require** that some or all of their matters have a budget of fees and expenses expected for the life of the matter submitted and be approved by them prior to invoicing. If instructed to set a Budget please see below.

The Budget feature is used to track actual fees and costs and percent of budget on a given matter. Below are the steps to submit your matter budget for approval:

- From the Home screen, under the Matters section, click “Budget Action Required”.
- From the Matter Search – Matter List screen, under the Budget Status column, click “Pending Budget” link.
- From the Law Firm Budget Overview screen, under Budget Amounts, click the “Edit” button.
- From the Edit Budget Amounts screen, enter your “Remaining Life of Matter Budget” amount and click the “Save” button.
- From the Law Firm Budget Overview screen, under Budget Amounts, confirm the amount is correct, and then click the “Submit” button. Your client will receive an email advising them to approve your budget.

Please see the **Help** files for more details.