

Published Date: 2023-08-04

Version: 1

Quick Links

[What's New](#)
[Improvements](#)
[Addons](#)

We have been hard at work upgrading LEX247 which will allow us to introduce some exciting features in the near future. Please keep an eye out on our [Upcoming Features](#) which will be updated periodically on what we are working on. Our last release notes can be found [here](#).

You can also search our [Knowledge Base](#) for additional articles if necessary or you can contact customer support for more information if you cannot find any relevant article(s).

The features mentioned below will be available after **2022-08-06**.

What's New?

Price Lists

The long-awaited feature, Price Lists is now available. This was soft-launched in our last update to a few customers but is now available for all to use.

Price Lists can be used for various purposes, such as creating fee-specific amounts for the following Conditions: Case Type, Activity Types, Activity Type Groups, User Title, or User.

PL with -10% to Fee
7/27/2023

Edit Price List

Name: PL with -10% to Fee | Start Date: 7/27/2023 | Can be used in: Cases Clients

Rules

Activity Type	Standard Fee	Hourly Fee	Currency
<Unspecified>	Standard Fee	1,000.00	USD

+ Add Rule

Filters

<Unspecified>	Multiplier	Value
Select...	0.90	

+ Add Filter

Cancel

After a Price List is created, you can set the Price List in the following areas: Case, Client, Case Types, and Billing Units.

CASE 35170-001

Standard Consultation

REPORT ASSET

Dashboard

Details

Participants

Time Records

Expenses

Default Hourly Fee's

Yearly Standard Fees Price List

Billing Type

Billable

Please read the following article on the [Different Fee Levels](#) that include Price Lists that effects what fee levels will take effect when time is reported.

Who can access it?

1. Users with 'Administrator'-rights when setting up Price Lists.
2. Users with 'Administrator'-rights when adding Price List to either Case Type(s) or Billing Unit(s).
3. Users who can edit Client and Case Cards can add Price List to either Client-level or Case-level.

Where can it be found?

Control Panel > Billing > Manage Price Lists.

Learn More

[Price Lists: What are Rules, Filters & Conditions?](#)

[How to Create a Price List?](#)

[How to Assign a Price List on Case Card?](#)

[How to Assign a Price List on Client Card?](#)

[How to Assign a Price List to a Practice Area?](#)





[How to Assign a Price List on Billing Unit?](#)

Time Bank


This feature is not available as a standard in LEX. If you are interested in this feature, please email Customer Support at support@lex247.com.

Through the Control Panel, you can now create Time Banks.

Time Banks was created with insurance in mind. For example, if a client of yours has purchased Home Insurance (Hemförsäkring) or Legal Insurance (Juristförsikring), you can create Time Banks for the number of hours covered by those insurances.

CASE 35170-001     Kim Chang

Standard Consultation



- Dashboard
- Details
- Participants
- Time Records
- Expenses
- Activities
- Documents
- Communication
- Invoices

Invoice Specification: *Inherited from Billing Unit*

Invoice Due Days: *Inherited from Billing Unit*

Invoice Currency: *Inherited from Billing Unit*


Invoice Separately:

\$ Case Budget


Time Bank

Primary Time Bank 0h / 10h

Opened

7/25/2023 2:46 pm by  Kim Chang

Last Modified

7/25/2023 2:46 pm by  Kim Chang

After a Time Bank has been created in the Control Panel, you can add the Time Bank(s) in the Details-view in the following Cards: Client, Payer, Related Entity, and Case.

Time Banks must first be created, added to the Client, and then added to the Case before it can be used. When time is reported in the Case, the number of hours used will show how much is used.

Time Bank

Primary Time Bank 3h / 10h

This is also updated in real-time when reporting time on a Case with Time Bank.

Report Asset TIME EXPENSE

Standard Consultation
Primary Time Bank (10h) 7h available

Select Activity Type...

Description 🇬🇧 Date 📅 7/27/2023

Duration ⓘ 0.0 🔗 From (optional) 00:00 - To (optional) 00:00 *Time Unit is set to 6 min*

Time is Billable, for 100 USD / Hour [Change...](#)

👤 Kim Chang

🕒 START TIMER CANCEL REGISTER REGISTER & CLOSE

Who can access it?

1. Users with 'Administrator'-rights when setting up Time Bank.
2. Users who can edit Clients, Cases, Payers, and Related Entities can add Time Bank in the Details-view.

Where can it be found?

Control Panel > Data Types > Manage Time Banks.

Learn More

[How to Create a Time Bank?](#)

[How to Add a Time Bank?](#)

User Experience Level

You can now add User Experience Levels in the Control Panel.

User Experience Levels are used as a Rule/Filter Condition for Price Lists. When setting up User Experience Levels for Price Lists, you can create as many User Experience Levels as required so you can have more options to create specific Fees for Users based on their experience in the law firm.

This brings an additional level of customization for you to create custom fees rather than having to use the limited amount of User Roles in LEX.

Add User Experience Level

English | v ⓘ

Name

Number

Description

Rule Condition where you can set the User Experience Level.

Add Price List

Name

Start Date X 🗑️

Can be used in Cases Clients

Rules

^	User Experience Level v	Hourly Fee	+ v
v	Select... v	<input type="text" value="0.00"/>	USD v 🗑️

After a User Experience Level is created, you can add it to a User in Control Panel > Manage Users.

Edit User X

Username ⓘ Number

Full Name ⓘ Initials

User Role Job Title Experience Level

User Rights

<input checked="" type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Accounting	<input checked="" type="checkbox"/> Reporting
<input checked="" type="checkbox"/> Compliance	<input checked="" type="checkbox"/> Approve others Invoices	<input checked="" type="checkbox"/> Access to all Billing Units

Access to Business Units ⓘ

Who can access it?

Users with 'Administrator'-rights when setting up User Experience Levels and creating Price Lists with it as a Rule/Filter Condition.

Where can it be found?

Control Panel > Data Types > Manage Users Experience Levels.

Learn More

[How to Add a User Experience Level](#)

Blacklist

You can now configure and manage Blacklists in LEX through the Control Panel.

Add Blacklist X

Name	Legal Name
<input type="text"/>	<input type="text"/>
Notes	Relationship Type
<input type="text"/>	Select... v
Keywords	Description
<input type="text"/>	<input type="text"/>

These Blacklists created, depending on the Relationship Type selected, will be used when performing the Conflict of Interest checks during the creation of cases and case requests.

Conflict of Interest

- ✓ PASSED CLIENT AND OPPONENT REGISTRY
- ✗ FAILED CLIENT BLACK LIST
 - Client has been Blacklisted (Edward Darby [Blacklist Note])Check initiated by Kim Chang, 8/4/2023 5:04:16 AM

You can create Blacklists with the following Relationship Types;

1. Client

- If you add this Person/Company as a Client, when performing the Conflict of Interest check will display failed with the name of the Blacklisted client.

2. Opponent

- If you add this Person/Company as an Opponent, when performing the Conflict of Interest check will display failed with the name of the Blacklisted opponent.

3. Payer

- If a Pure Payer exists in the system, and you add their name to the Blacklist, if you add this Person/Company as a Client, when performing the Conflict of Interest check will display failed with the name of the Blacklisted payer.

Who can access it?

Users with 'Administrator'-rights to set up Blacklists.

Where can it be found?

Control Panel > Organization > Manage Blacklist.

Learn More

[How to Add a Blacklist](#)

Improvements

New Control Panel User Interface

We have updated the User Interface in Control Panel in all areas. Here are some examples.

Law firm Settings

The screenshot displays the 'Lawfirm settings' page. At the top, there is a navigation bar with 'LEX247 - LEX247 Consulting' on the left and a user profile 'Kim Chang' on the right. Below the navigation bar, the page title 'Lawfirm settings' is shown with a 'GO TO CONTROL PANEL' link. The main content area is divided into several sections:

- Lawfirm settings:** Includes text input fields for 'Law firm name' (LEX247 Consulting) and 'VAT identification number' (1234567890). It also features dropdown menus for 'H.Q. Country' (United States of America (USA)), 'H.Q. Time Zone' ((UTC+07:00) Bangkok, Hanoi, Jakarta), 'Default Language' (English), and 'Default Currency' (USD - U.S. Dollar). There are several checkboxes: 'Practice Area is Mandatory', 'Display "My Business Unit Cases" section at Main Cases view', 'Allow Clients without any Identity Number (VAT, Corp. number or SSN)' (checked), and 'Notify assistants when new Case Requests are created'. A dropdown menu for 'Business Units for assistants notification' is set to 'Select...'. There is also a dropdown for 'Who can Approve invoices...' set to 'Client Managers and Case Managers' and a dropdown for 'Layout uses in the report dialog...' set to 'Classification-first layout'. A numeric input field for 'Max amount of responsible client managers' is set to '2'.
- Time reporting settings:** Includes a 'Backdating limit' of '0 Days (0 = Unlimited)', a 'Default Activity Type' of '-- No Default Activity Type --', a 'Minimum Time Unit Size' of '6 Minutes', and a checked checkbox for 'Activity Type is Mandatory'.
- Expense reporting settings:** Includes a 'Backdating limit' of '0 Days (0 = Unlimited)', a 'Default Activity Type' of '-- No Default Activity Type --', and a checked checkbox for 'Activity Type is Mandatory'.
- Number Series:** Includes a 'Client Number Serie' field with '(SERIE:5)' and a 'Next Number in Client Serie' field with '35176 (Can only be set to unused number)'. A small downward arrow icon is visible in the bottom right corner of the settings area.

Manage Users



+ Add User

Deactivate Selected

Selected View

LEX247 Consulting ALBQ

All Active Users

Q Enter text to search...

Refresh

<input type="checkbox"/>	Display Name ^	Username	Status	Role	
<input type="checkbox"/>	Augusta Minerva Lennox	lex247consulting+augusta@gmail.com	Active	Associate	
<input type="checkbox"/>	Brienne Christie	lex247consulting+brienne@gmail.com	Active	Assistant	
<input type="checkbox"/>	Catelyn Fairley	lex247consulting+catelyn@gmail.com	Active	Associate	
<input type="checkbox"/>	Charles L.	lex247consulting+charles@gmail.com	Active	Staff	
<input type="checkbox"/>	Chuck Wolowitz	lex247consulting+chuck@gmail.com	Active	Associate	
<input type="checkbox"/>	Gus Gubelmann	lex247consulting+gus@gmail.com	Active	Associate	
<input type="checkbox"/>	Howard Cooper	lex247consulting+howard@gmail.com	Active	Associate	
<input type="checkbox"/>	Kim Chang	lex247consulting+kim@gmail.com	Active	Assistant	
<input type="checkbox"/>	Michael Highmore	lex247consulting+michael@gmail.com	Active	Associate	
<input type="checkbox"/>	Pat Apiwongpattara	lex247consulting+pat@gmail.com	Active	Assistant	

Go to page : 1

« < 1 2 > »

Page size : 10

Page 1 of 2 (13 Items)

Nothing has changed in terms of functionality, what you have been used to remains, we have just made the User Interface more pleasing to the eye and slightly re-arranged some settings/configurations to be much clearer.

Who can access it?

Users with 'Administrator'-rights.

Where can it be found?

Control Panel

Lawfirm Settings > Features

Over the years, we have developed various custom configuration settings for our customers. These configuration settings either changed the behaviour of LEX247 or changed specific workflows that support the needs and requirements of small, medium, and large law firms.

We have now added all these configuration settings to the Control Panel, under Law firm Settings.

You can now turn on or off these settings and configure/customize LEX247 to support your own workflows required by your law firm or Users.



Features

Allow duplicate numbers among data types

Default entity type when creating new entities

Client Settings

Use Person Job Title as Default Client Contact Role

Allow users with user role 'Partner' to Manage Clients

Allow everyone to access all clients

Allow everyone to access clients within their business units

Only allow users with Compliance-right to change KYC Risk level

Case Settings

Create Case

Only allow create new cases using Case Requests

Allow empty case names when create new case, defaulting to case type or tag name

Show placeholder text displayed in Case Name textbox when creating new case

Automatically add following user as default Case Manager on case/case request creation, when user is assistant

Automatically add following user as default Case Manager on case/case request creation, for user who is not an assistant

Automatically add case manager as client manager when creating an case with new client

Automatically add case manager as client manager when creating an case request with new client(s)

Case Requests require KYC process to be completed before accepting



Supporting articles will be created in the near future that will describe in detail each of these settings when they are turned on.

Important Notice:

For some, these configurations are already turned on. The configurations that you have had in the past will be reflected in these settings after release so you will not be required to turn them back on.

Who can access it?

Users with 'Administrator'-rights.

Where can it be found?

Control Panel > Organisation > Lawfirm Settings

If you have any questions about any of these settings, please contact Customer Support.

If you have any questions regarding any of the above, please feel free to contact

support.nordics@lex247.com or support@lex247.com.

Release Note Updates

- None... so far.