LEGALOPS360

LegalOps360 User Guide

For in-house legal teams. About 10 minutes to read, 15 minutes to set up.

LegalOps360 helps a legal team track matters, check outside counsel invoices against its billing guidelines, and review contracts against compliance frameworks. AI assists the analysis. A person always makes the final decision.

> The live demo at **legalops360.ai/demo** uses sample data. You can follow every step below there without signing up.

1. Get started

1. Go to legalops360.ai and choose **Start Free Trial**.
2. Enter your work email, a password, and your **organization name**. Your organization is created automatically and you become its administrator.
3. Sign in. You land in **Matters**. The navigation bar gives you Matters, Vendors, E-Billing, Compliance, Analytics and Settings.

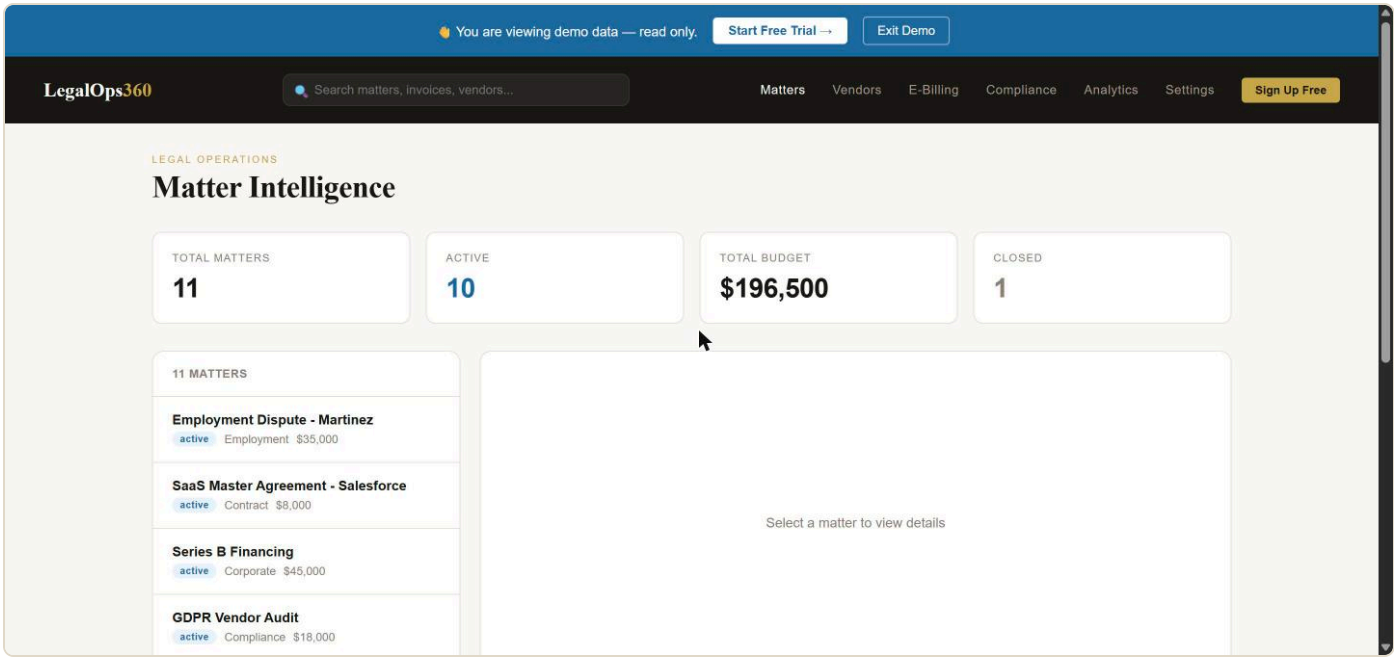
Invite your team: Settings, then Users. Enter an email, choose a role, and send the invite.

Everything you add belongs to your organization only. Other organizations cannot see it.

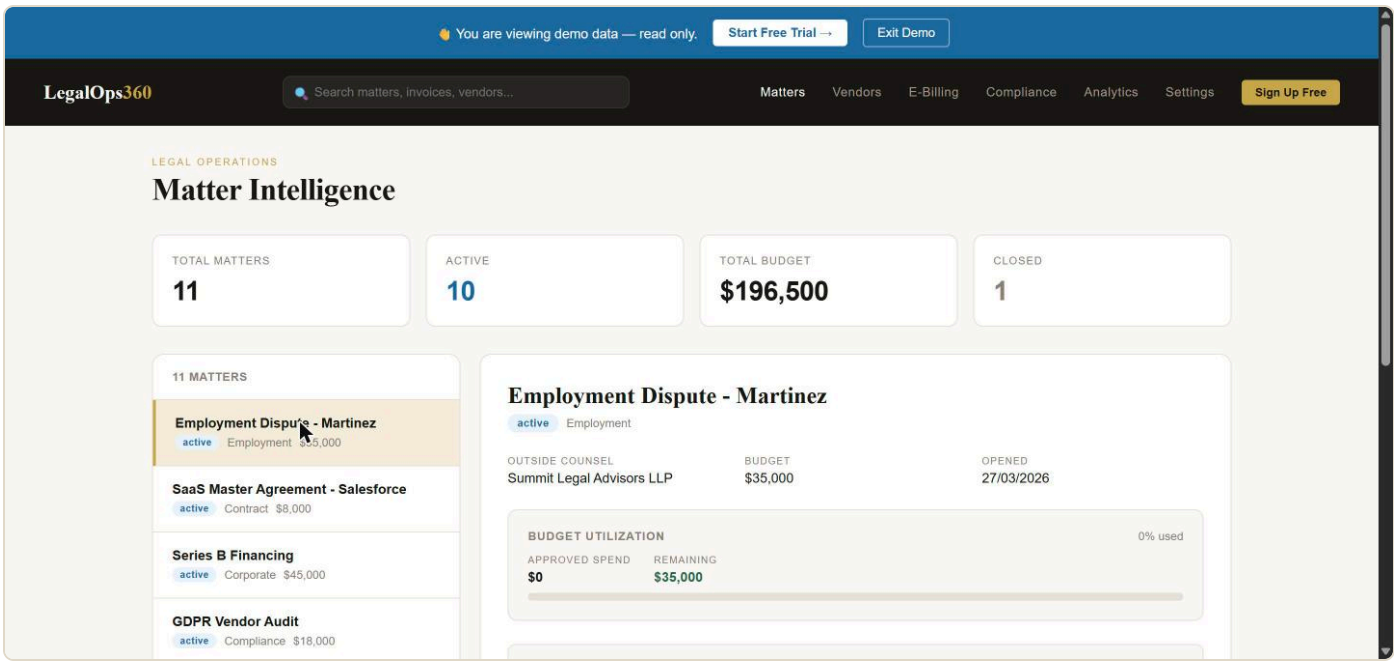
2. Matters

Matters is where you track legal work and its budget.

1. Choose + **Add Matter**.
2. Fill in **Matter Name** (required), **Type**, **Status**, **Outside Counsel**, **Budget** and a **Description**.
3. Save. The matter appears in the list. Select it to see details and linked invoices, and to **Edit** or **Close** it.



The Matters page: summary cards at the top and your matters below.

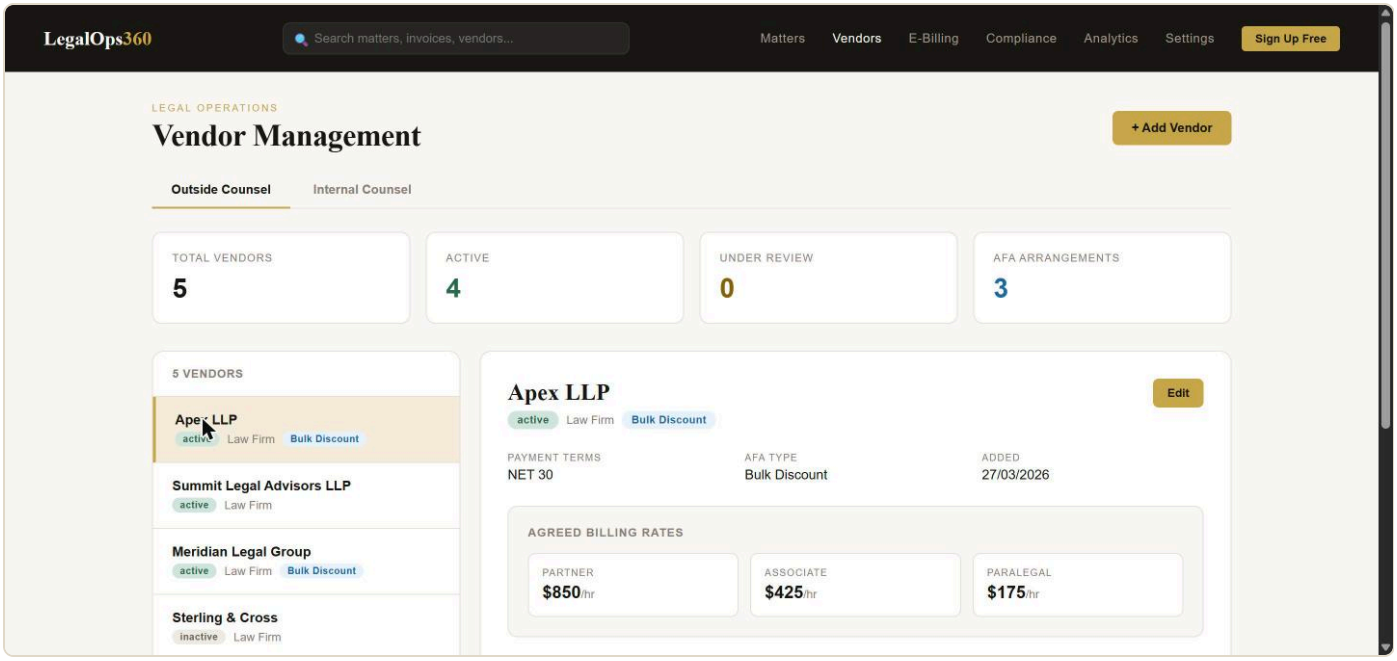


Select a matter to see its outside counsel, budget and how much has been approved against it.

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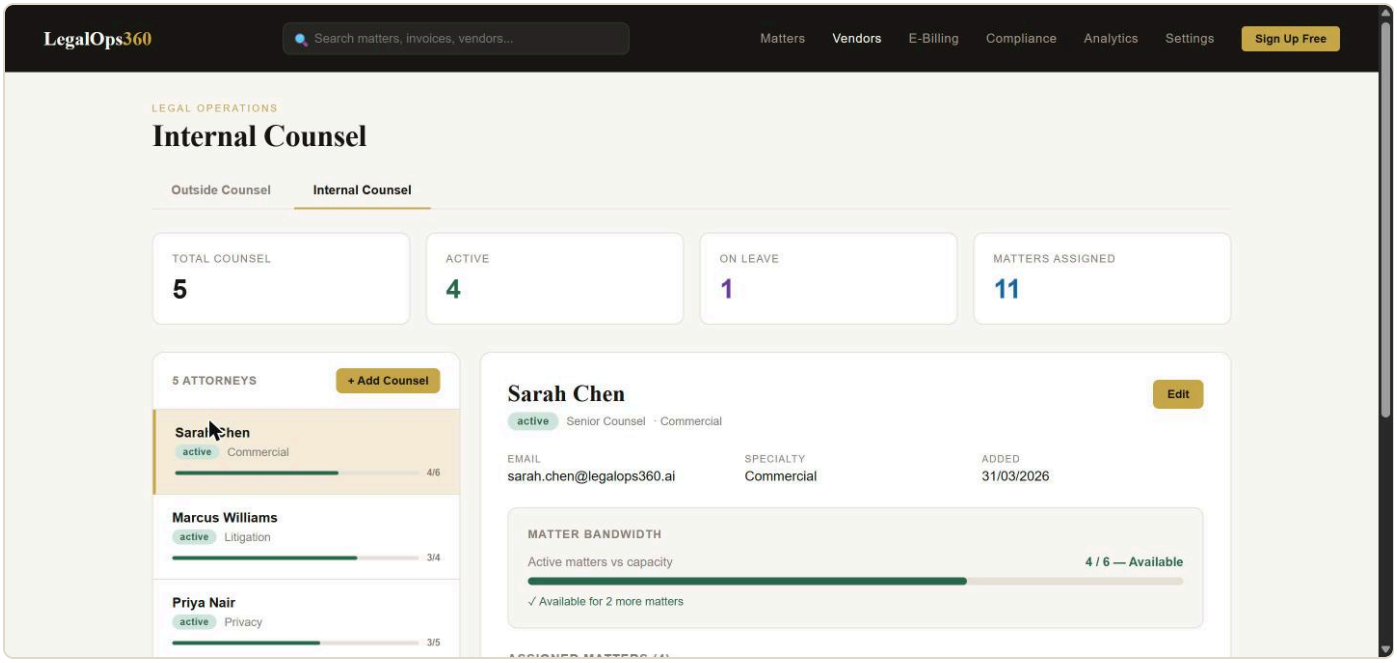
3. Vendors and internal counsel

Outside counsel (law firms): Vendors, then **Outside Counsel**, then **+ Add Vendor**. Record the firm, payment terms, any alternative fee arrangement (AFA), and rates for partner, associate and paralegal. These rates support invoice checks.



A vendor record with payment terms, AFA type and agreed hourly rates.

Internal counsel (your own attorneys): Vendors, then **Internal Counsel**, then **+ Add Counsel**. Enter name, title, email, specialty, status and the maximum number of matters that person should hold. The list shows each attorney's workload against that maximum.



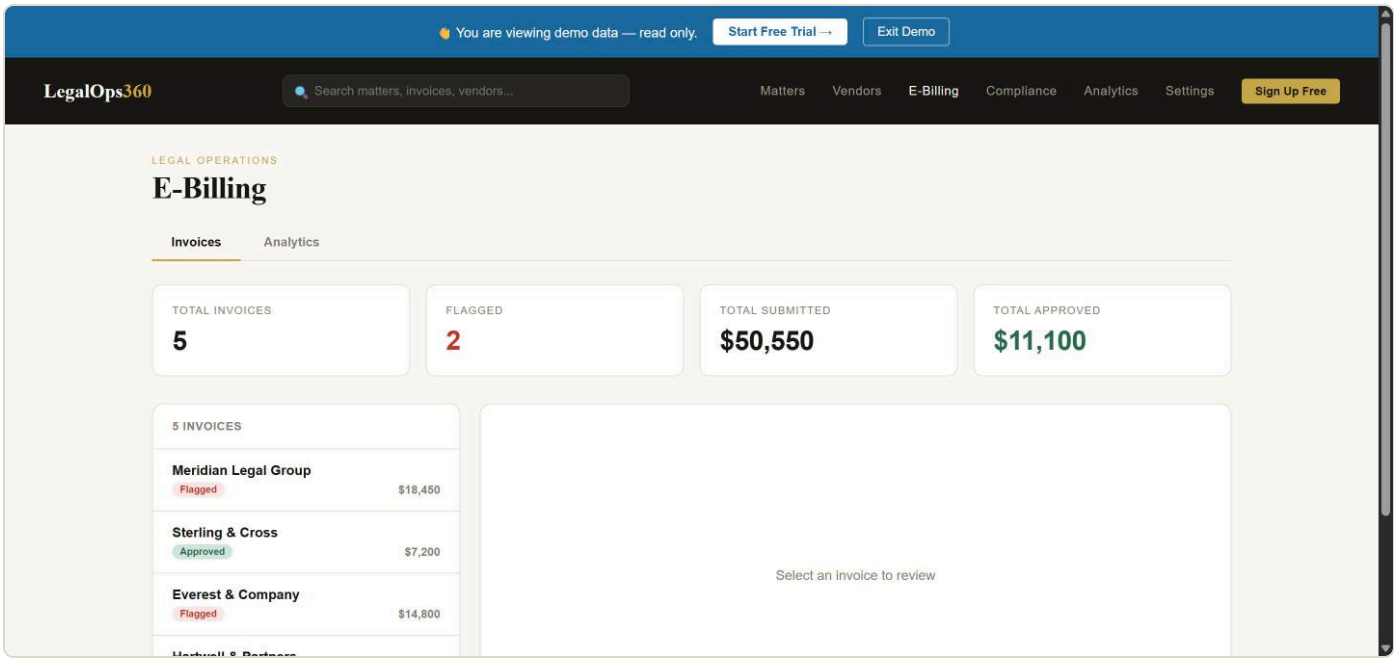
Internal Counsel: each attorney with active matters against capacity.

4. E-Billing: check an invoice

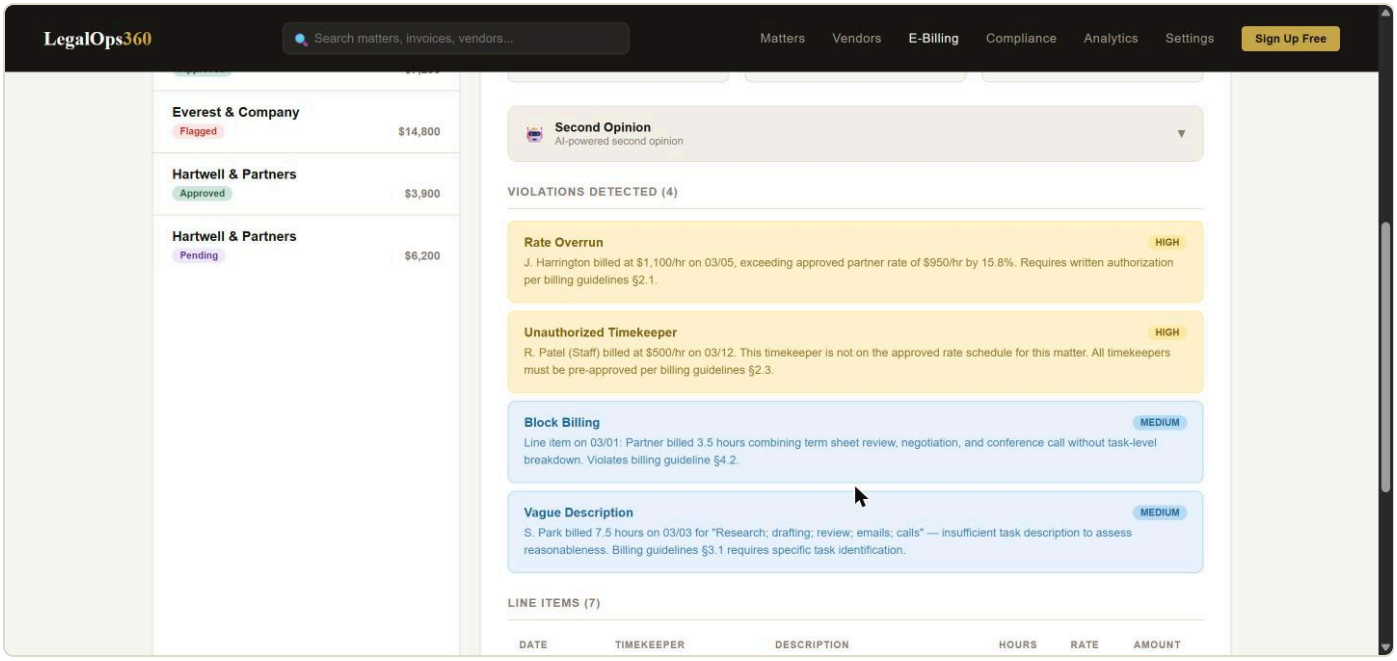
Upload one invoice (PDF)

E-Billing reviews outside counsel invoices against your billing guidelines before you approve payment.

1. E-Billing, then **Upload Invoice**, and choose the PDF. It must be a text-based PDF you can select text in, not a scan or a photo.
2. The AI reads the invoice and lists any violations, such as block billing, rates above your caps, vague entries, duplicate billing, clerical tasks, excessive time, unauthorized timekeepers or rounding up.
3. Check the vendor and amount, link the invoice to a matter if you like, and **Save**.
4. Open the invoice to review each violation. **Approve** it, or **Flag** it for discussion with the firm.



E-Billing: invoices with their status, flagged items and totals.



Each violation shows its severity and the guideline it breaks.

Upload many invoices (LEDES): use the LEDES98B `.txt` option to import one or several files at once. Each file is parsed and shown for review before import.

Get a second opinion on an analysis: on a reviewed invoice choose a mode: **Expand** (adjacent risks), **Critique** (weak spots), **Debate** (a case for and against) or **Fact-check** (checks the analysis against standard billing guidelines, such as ABA and ACC, and rates how reliable the analysis is).

Your billing rules: rate caps and which violation types to check can be set per organization. If none are set, sensible defaults apply: Partner $900, Senior Associate $700, Associate $500, Paralegal $250 per hour.

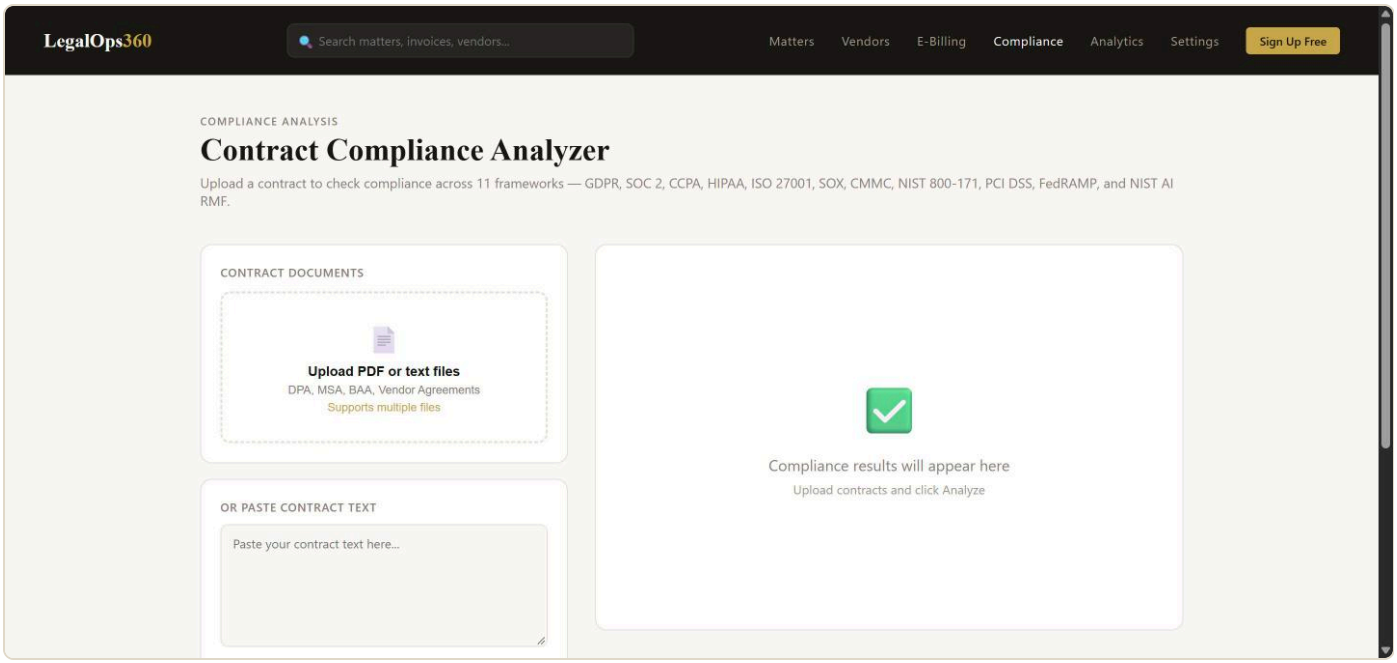
The **Analytics** tab in E-Billing shows approval rate, flag rate, and spend by firm, by matter and by month.

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5. Compliance: review a contract

1. Open **Compliance**.
2. Paste the contract text, or upload one or more files.
3. Choose **Analyze**. The contract is checked against eleven frameworks: GDPR, SOC 2, CCPA, HIPAA, ISO 27001, SOX, CMMC, NIST 800-171, PCI DSS, FedRAMP and NIST AI RMF.

4. For each framework you see a score, the gaps found, and suggested replacement clause language you can insert into the agreement. Frameworks that do not apply to the contract type are marked as such.

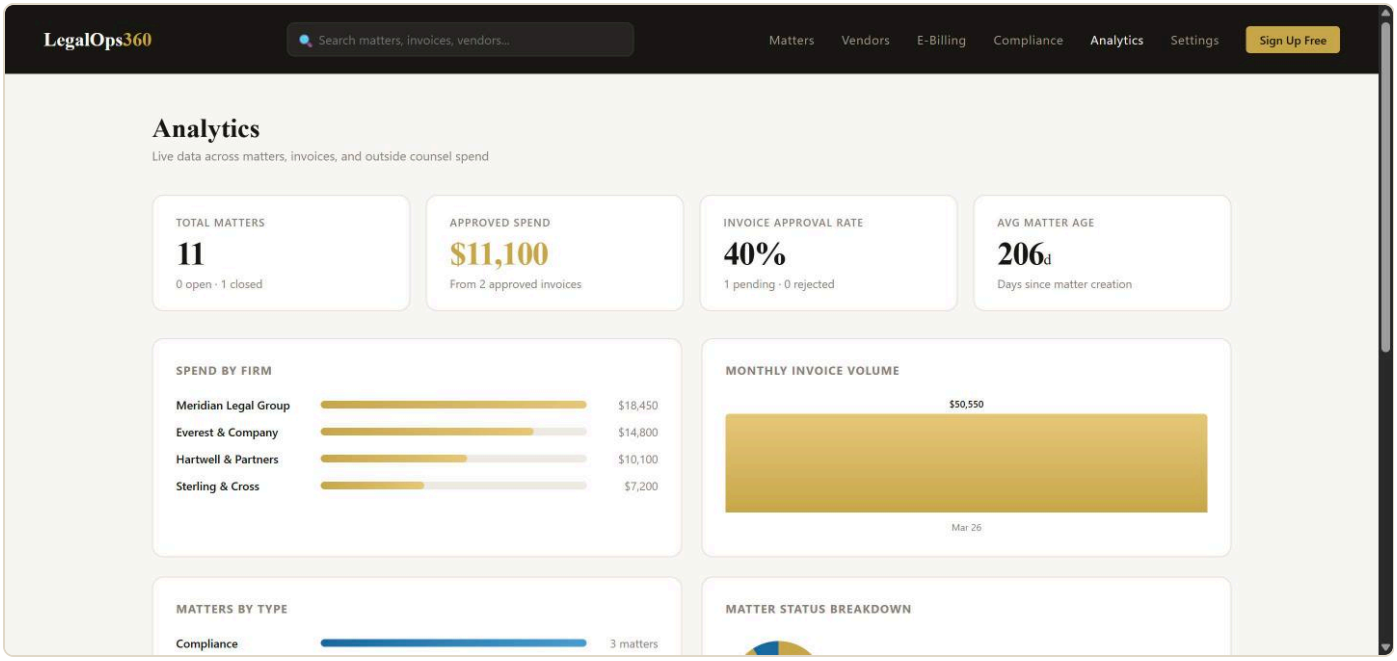


Upload or paste a contract, then choose Analyze.

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6. Analytics

Analytics gives dashboards of outside counsel spend by matter, firm and practice area, with budget variance and trends. Use it for reports to your General Counsel or CFO.



Spend by firm, monthly invoice volume, and matter breakdowns.

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7. Settings

Settings, then **Organization**, shows your organization details and support contact. **Users** shows your team and lets you invite colleagues.

Good to know

- **AI assists, you decide.** Analyses are aids. Review them before you act on them or send them to a law firm.
- **Your data.** Contract and invoice text is sent to an AI provider only to produce the analysis. We do not sell your data or use it to train AI models. Contracts you analyze are not kept unless you save the results, and invoices you save are stored in your own organization's space, which other organizations cannot see. See our Trust page and Privacy Policy for details.
- **PDF tips.** If an invoice upload fails, make sure the PDF contains selectable text. A "print to PDF" copy of the invoice usually works.
- **Need help?** Email info@legalops360.ai.
