

Apperio Adds Auditable Invoice Review and Approval Workflow to Legal Spend Management

London, UK – May 19, 2022 – Apperio, a provider of legal spend analytics and matter tracking software, today announced the availability of a new feature to streamline the process of reviewing and approving law firm invoices to its legal spend management platform. The new feature includes a detailed audit trail that tracks and reports every action made about an invoice as it moves through the review and approval workflow.

Apperio is best known for providing in-house teams with real-time visibility into work-in-progress and accruals. This allows legal teams to control legal spend and gives them the insight to know their total legal costs even before they receive an invoice. This new feature closes the loop on the payment cycle by allowing in-house teams to channel invoices through a formal business workflow to approve law firm payments.

“For most of our customers, the review and approval of law firm invoices is a matter of formality,” says Apperio Founder and CEO Nicholas d’Adhemar. “The fact remains, even in-house teams who are in total command of their legal spend still have to follow a process to get invoices paid – and many have compliance requirements to maintain a record of authorization.”

Alongside the audit trail, another unique aspect of the new feature is the ability to show a breakdown of line-item charges alongside a law firm’s PDF invoice. Apperio is already tracking accruals by fee-earners along with time entries and

narratives which makes it simple to populate this data. If there's a query regarding a charge on an invoice, it's easy for an in-house legal team to remind themselves of the details without going back and forth with their law firm.

Some further capabilities of the new invoice review and approval feature include the following:

- Flexible configuration. Legal teams can configure an unlimited number of approval steps to match nuanced internal business processes.
- Automated rules. Create automated rules to trigger a pre-configured workflow. For example, if an invoice amount reaches a certain threshold, it may require an additional approval step from the GC or CEO.
- Supporting documentation. Reviewers can reference letters of engagement, records of instruction, credit notes and other supporting documentation that's been associated with a matter file in Apperio, alongside an invoice.
- In-app comments. The feature enables reviewers to write comments for other reviewers in the approval process. This is useful for annotating pre-approved expenses, for example, which keeps the review process moving forward.
- Invoice query. Reviewers can query an invoice directly from within the workflow. All communication is recorded in the approval history for reference and auditing.
- Seamless integration. Apperio can easily integrate with an existing accounts payable (AP) system – to allow for timely payment of approved invoices.
- Dashboard reporting. The feature provides customizable reporting in the Apperio dashboard to track progress and identify bottlenecks around invoice review. Some of the metrics that can be tracked include the aggregate status of

invoices in review, the total time in review, and which invoices are still pending actions by a reviewer.

Apperio developed the invoice review and approval process in response to customer requests. It's the latest in a string of new features available in its legal spend management product. For example, Apperio recently released matter files and enhanced dashboards for legal ops and finance, personalization features for in-house lawyers by role, and client-centric views for outside counsel.

"As our customers use Apperio to gain control of their legal spend, they begin to identify new needs that would benefit from automation," added d'Adhemar. "We continuously strive to be highly responsive to the market and develop additional functionality that uses data and technology to drive better legal outcomes."

Note: Apperio will be hosting a complimentary feature spotlight webinar showcasing the new invoice approval workflow on Thursday, June 9, 2022, from 15:00-15:20 BST(10:00-10:20 a.m. EDT); register here (<https://www.apperio.com/events/feature-spotlight-webinar-invoice-approval-workflow>).