



# Fee Tracking Agent

🕒 Estimated time: 5 minutes

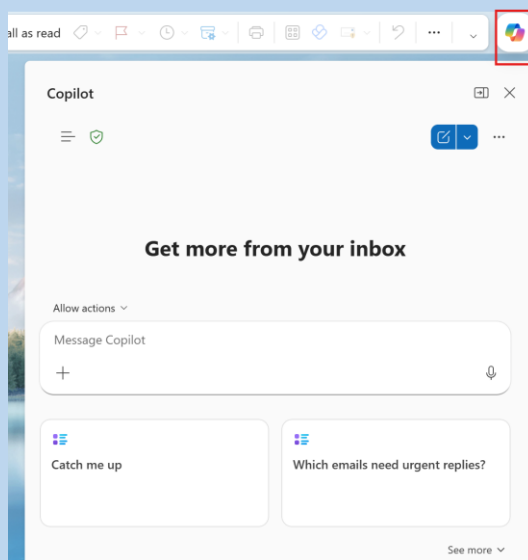
*(recipe inspired by Eversheds Sutherland)*

## Purposes:

- For each matter or client, generate a table directly in Outlook message for writing billing emails and summaries.

## Step-by-step guide:

1. Navigate to [outlook.live.com/mail](https://outlook.live.com/mail) or open your desktop Outlook. Expand the **Copilot** panel on the right. Alternatively, navigate to <https://m365.cloud.microsoft/chat>.



2. Type and adapt the following sample prompt in the text box.

### # GOAL

Produce a bite-sized summary of the legal fees of a matter, including the following items:

- Initial work scope and fee estimate;
- Agreed fee and the date on which it was agreed;
- Applicable hourly rates;

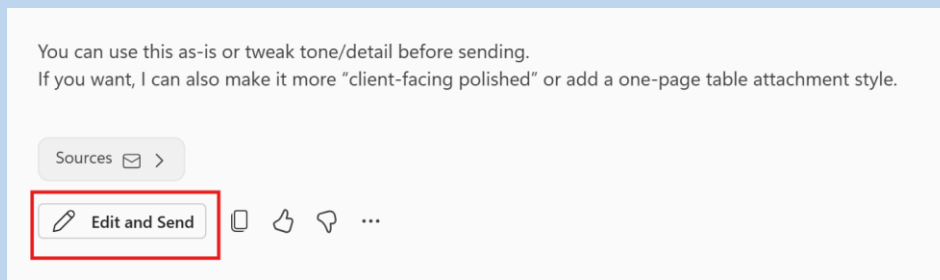
- Any budget increase requests and whether they were approved by the client;
- All work-in-progress updates provided to the client (which shows the actual spending);
- Remaining budget; and
- Billing protocols.

### # INSTRUCTIONS

In the **[Matter name]** matter, please review all emails containing discussions related to fees in a chronological order, and provide a summary table of such discussions. Include the current state of the agreed scope and fees for this work with the details in #Goal above. Please also retrieve any pricing guidance shared by the client and the rates applicable.

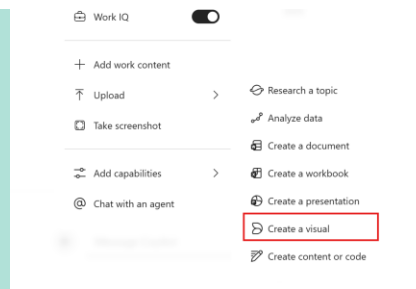
Based on the summary table, draft an email to **[Client name]** summarising the fees incurred to date, including key developments, current budget status, and any remaining budget.

3. Review the summary and further prompt Copilot to fine-tune the table. Click **Edit and Send** if the draft email is ready.



### Practical Tips

- Ask Copilot to act on next steps, for example, adding forecasted remaining costs and generating a bar chart comparing incurred costs versus budgeted amount and forecasted amount (using the **Create a visual** function).



- In the Copilot app, use **Add work content** to upload relevant emails, documents and files to provide additional context and improve the quality of the output.
- You can also save the prompt to your **Copilot Prompt Gallery** for future uses by hovering above the prompt you sent and clicking the bookmark icon.

