

# How to Duplicate Billing Transactions

## Objectives:

- Duplicate Invoices
- Duplicate bills
- Duplicate Journals

## Steps:

Accountants now can replicate invoices, bills, and journals. This enhanced feature greatly improves efficiency, enabling you to quickly duplicate your billing transactions, simplifying the process, and conserving valuable time.

### Duplicating Invoices:

To duplicate invoices, go to **Billing Invoices View All Invoices**.

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Save as

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Invoice#	Client's Account	Matter Name	Invoice Date	Approval Stat...	Status	Practice Area	Total	Total Tax	Collection	Curren	
INV0000107	Albert smith - USD		2023-11-27								
INV0000106	Albert smith - USD	Albert Vs Branding Company	2023-11-27	approved	paid	Jilly	1,500.00 USD	Civil	0.00 USD	1,000.00	USD
INV0000105	Advanced Industries - USD	legal advice for Advanced Industries	2023-11-14	approved	partially paid		1,000.00 USD	Agreement	0.00 USD	500.00	USD
INV0000104	abc - USD	ABC X Agency Grid	2023-11-06	approved	paid		2,200.00 USD	Commercial	0.00 USD	2,200.00	USD
INV0000103	Alberto Scott - USD	Due Diligence-Alberto Scott	2023-11-06	waiting approval	draft		300.00 USD	Due Diligence	0.00 USD	0.00	USD
INV0000102	abc - USD	XY x Z , Legal opinion for ABC	2023-08-16	approved	overdue		1,000.00 USD	Arbitration,Legal opinion	0.00 USD	500.00	USD
INV0000101	BLP industry - USD	Legal Opinion for BLP	2023-08-09	approved	overdue		1,755.63 USD	Administrative	29.70 USD	1,000.00	USD
INV0000099	BLP industry - USD	BLP industry x ABC, Legal Opinion for BLP	2023-08-02	approved	overdue		1,799.10 USD	Commercial,Administrative	89.10 USD	0.00	USD
INV0000098	BLP industry - USD		2023-07-26	approved	draft		450.00 USD		0.00 USD	0.00	USD
INV0000097	Maria Smith - USD	Commercial Consultation for Maria	2023-07-25	approved	paid		4,500.00 USD	Commercial	0.00 USD	4,500.00	USD

From there, click on the action wheel icon located next to the invoice that you want to duplicate, and choose **More->Clone**

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Columns

Invoice#	Client's Account	Matter Name	Invoice Date	Approval Stat...	Status	Practice Area	Total	Total Tax	Paid	Curren
INV0000181	ABC Services - USD	ABC services x PAD	2024-05-10	waiting approval	draft	Commercial	11,600.00 USD	0.00 USD	0.00	USD
INV0000180	Advanced Solutions - USD	Legal Advice for Advanced Solutions	2024-05-09	waiting approval	draft	Consultation	2,200.00 USD	0.00 USD	0.00	USD
INV0000179	BLP industry - USD	BLP x ABC	2024-05-07	approved	partially paid	Commercial	20,000.00 USD	0.00 USD	18,000.00	USD
INV0000178	BLP industry - USD	BLP x ALvah, Legal Opinion for BLP industry	2024-05-07	approved	paid	Constitutional Court,Commercial	12,423.37 USD	1,052.77 USD	12,423.37	USD
INV0000177	USD		2024-05-07	waiting approval	draft		1,000.00 USD	0.00 USD	0.00	USD
INV0000176	ABC Services - USD	Legal opinion for ABC services , ABC services x Bernadette	2024-04-24	approved	paid	Legal opinion ,Civil	999.00 USD	99.00 USD	999.00	USD

Approval Status

Invoice Details

Export

Delete

More

Preview

Clone

Cancel

You can also create a duplicate of the invoice from inside the invoice itself.

All you have to do is to click on the **action wheel clone**.

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Invoice Details

Collection

Attachments

Email

INV-0000088

DRAFT

Labbini LLC - USD

Labbini LLC

Date

2023-11-22

Due On

2023-11-22

Reference Number

(No Data)

Terms

In Advance

P.O#

(No Data)

Description

(No Data)

Matters Linked

Summary

Sub Total

USD 500.00

Total Discount

USD 0.00

(At Invoice Level After Tax)

Adjustment

USD 0.00

Total Tax

USD 0.00

Total

USD 500.00

Invoice Template

invoice template

Invoice Status

Draft

Approval Status

Approved

Customize Template

Company Name

INVOICE

Matter ID: 00000001

Bill To: Labbini LLC

Matter Name: Legal opinion for Labbini LLC

Tax Number: 1234567

Status: Draft

Date: 2023-11-22

Due On: 2023-11-22

Terms: In Advance

Services

This will redirect you to the invoice page, where all the duplicated invoice data is added.

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Client

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Items

Additional Info

Client Account

Labbini LLC

Invoice Templates

invoice template

Invoice Number

INV-0000089

COM000000005: Labbini LLC

Currency: USD

Tax Number: 1234567

Bill To: Labbini LLC

Customize Template

Company Name

Invoice

Skip to Items

Next

Subsequently, you can include additional information in your invoice as usual.

 This feature is exclusively applicable to invoices with "Services" items only.

## Duplicating Bills:

To duplicate bills, go to **Billing Suppliers View All Bills**

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Dashboards Clients ▾ Invoices ▾ Expenses ▾ Time Entries ▾ Suppliers ▾ Partners ▾ Reports ▾ Advanced ▾

**Bills** All ▾ Save as

1 - 20 of 69 Items 🔍

Bill Date	Bill#	Supplier Account	Supplier Account Number	(USD)	Balance Due (USD)	Due Date	Status	Supplier Bill#
2023-11-27	BIL-0000105	Brandly Translation - EUR	SUP8		70.00	2023-12-27	Partially Paid	
2023-11-10	BIL-0000104	SSC Software - USD	SUP10	5,550.00	0.00	2023-11-10	Draft	
2023-10-25	BIL-0000103	Common Law - USD	SUP18	300.00	300.00	2023-10-31	Paid	
2023-10-25	BIL-0000102	Common Law - USD	SUP18	200.00	200.00	2023-10-31	Paid	
2023-10-24	BIL-0000101	Common Law - USD	SUP18	555.00	555.00	2023-10-24	Paid	
2023-10-24	BIL-0000100	Common Law - USD	SUP18	950.00	950.00	2023-10-25	Paid	
2023-10-16	BIL-0000099	SSC Software - USD	SUP10	11,100.00	0.00	2023-10-31	Draft	
2023-09-28	BIL-0000098	Brandly Translation - AED	SUP17	1,600.00	1,600.00	2023-09-28	Paid	
2023-09-20	BIL-0000097	Brandly Translation - AED	SUP17	0.00	0.00	2023-10-06	Paid	
2023-09-05	BIL-0000096	BLP industry - USD	SUP9	550.00	0.00	2023-09-05	Overdue	
2023-08-14	BIL-0000095	BLP industry - USD	SUP9	200.00	0.00	2023-08-15	Overdue	

From there, click on the action wheel icon located next to the bill that you want to duplicate, and choose Clone.

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**Bills** All ▾ Save as

1 - 16 of 16 items 🔍

Bill Date	Bill#	Supplier Account	Supplier Account Number	Total (USD)	Payment Made (USD)	Balance Due (USD)	Due Date
2023-10-16	BIL-0000018	Ed Traslation - USD	2	1.00	0.00	1.00	2023-10-16
2023-10-12	BIL-0000017	Ed Traslation - USD	2	20.00	20.00	0.00	2023-10-12
2023-07-31	BIL-0000016	Ed Traslation - USD	2	4.00	0.00	4.00	2023-07-31
2023-06-03	BIL-0000015	Ed Traslation - USD	2	100.00	100.00	0.00	2023-06-03
2023-05-10	BIL-0000014	Ed Traslation - USD	2	600.00	0.00	600.00	2023-05-10
2023-05-03	BIL-0000013	Ed Traslation - USD	2	50.00	0.00	50.00	2023-05-03
2023-04-06	BIL-0000011	Ed Traslation - USD	2	100.00	100.00	0.00	2023-04-06
2023-04-06	BIL-0000012	Ed Traslation - USD	2	100.00	0.00	100.00	2023-04-06
2023-04-05	BIL-0000009	Marshall - USD	1	139.00	139.00	0.00	2023-04-05
2023-04-05	BIL-0000010	Ed Traslation - USD	2	100.00	100.00	0.00	2023-04-05
2023-04-03	BIL-0000005	Marshall - USD	1	100.00	100.00	0.00	2023-04-03
2023-04-03	BIL-0000007	Marshall - USD	1	50.00	50.00	0.00	2023-04-03

You can also create a duplicate of the bill from its own menu.

All you have to do is to click on the **3 dots clone**.

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General Info
Approval Center
Payment Made
Attachments
Client Invoices

BIL-0000018 - Open
Preview Export Save ⓘ

Clone
Delete

Supplier \*  
Ed Traslation - USD

Date \*  
10/16/2023

Due date \*  
10/16/2023

Client's Account  
Start typing

Related Matter  
Start typing

Supplier Bill#

Tax Number

Approval Status  
Auto Approved

### Bill Summary

Supplier Bill#	
Supplier Name	Ed Traslation - USD
Date	2023-10-16
Due date	2023-10-16
Bill Reference	0000018
Subtotal (USD)	1.00
Total tax (USD)	0.00
<b>Total</b>	<b>1.00 USD</b>

### Bill Details

Account *	Description	Quantity	Price (USD)	Client Details	Tax (%)	Amount (USD)
Accounts						

This will navigate you to the bills page, where all the information is preloaded, allowing you to add any extra details for the duplicated bill.

BIL-00019 - Open ?
Save

Supplier \*  
Ed Traslation - USD

Date \*  
11/22/2023

Due date \*  
11/22/2023

Client's Account  
Start typing

Related Matter  
Start typing

Supplier Bill#

Tax Number

### Bill Summary

Supplier Bill#	
Supplier Name	Ed Traslation - USD
Date	2023-11-22
Due date	2023-11-22
Bill Reference	00019
Subtotal (USD)	1.00
Total tax (USD)	0.00
<b>Total</b>	<b>1.00 USD</b>

### Bill Details

Account *	Description	Quantity	Price (USD)	Client Details	Tax (%)	Amount (USD)
Accounts						
petty cash		1	1	USD		1.00

## Duplicating Journals:

To duplicate journals, go to **Billing Advanced View Journals**.

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Dashboards Clients ▾ Invoices ▾ Expenses ▾ Time Entries ▾ Suppliers ▾ Partners ▾ Reports ▾ Advanced ▾

Manual Journals Advanced Search

Date	Amount (USD)	Description	Created By	Journal#	Modified By	Created On	Modified On	External Ref. #
2023-07-07	1000.00	Open balance	James Marven (Inactive)	0000030	James Marven (Inactive)	2023-07-07	2023-07-25	
2023-05-05	1000.00	add balance	Carolina Robinson	0000029	James Marven (Inactive)	2023-05-05	2023-07-07	
2023-03-10	1000.00	Journal Entry	James Marven (Inactive)	0000025	James Marven (Inactive)	2023-03-10	2023-03-10	
2023-02-08	1300.00	bank reconciliation correction	Alice Jones	0000020	James Marven (Inactive)	2023-02-08	2023-02-08	
2023-02-07	200000.00	opening balance of BBC bank	Carolina Robinson	0000019	James Marven (Inactive)	2023-02-07	2023-02-07	
2023-02-07	5000.00	Transfer	James Marven (Inactive)	0000018	James Marven (Inactive)	2023-02-07	2023-02-07	
2023-02-07	7135.00	From Firm Expenses to legal expenses	Carolina Robinson	0000017	James Marven (Inactive)	2023-02-07	2023-02-07	
2023-01-09	5000.00		James Marven (Inactive)	0000016	James Marven (Inactive)	2023-01-09	2023-01-09	
2022-11-29	20000.00	opening balance	James Marven (Inactive)	0000014	James Marven (Inactive)	2022-11-29	2022-11-29	
2022-11-18	2140.00		James Marven (Inactive)	0000013	James Marven (Inactive)	2022-11-18	2022-11-18	
2022-09-27	3000.00		James Marven (Inactive)	0000012	James Marven (Inactive)	2022-09-27	2022-09-27	
2022-09-27	1000.00	Transfer money	James Marven (Inactive)	0000011	James Marven (Inactive)	2022-09-27	2022-09-27	
2022-09-01	13.20		James Marven (Inactive)	0000010	James Marven (Inactive)	2022-09-01	2022-09-01	
2022-08-25	10000.00	234	James Marven (Inactive)	0000009	James Marven (Inactive)	2022-08-25	2022-08-25	

Advanced ▾

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- Settings
- Set Content Language
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- Français
- العربية

View Journals

From there, click on the action wheel icon located next to the journal that you want to duplicate, and choose **Clone**.

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OH law firm - USD

Manual Journals Advanced Search

Journal#	External Ref. #	Date	Amount (USD)	Description	Created By	Created On	Modified By	Modified On
0000017		2023-10-04	71.30	Journal 1	stephan luiz	2023-10-04	stephan luiz	2023-11-22
		2023-09-26	1.00	Journal 2	stephan luiz	2023-09-26	stephan luiz	2023-11-22
		2023-07-10	1.00	testing trust funds	stephan luiz	2023-07-10	stephan luiz	2023-07-10
		2023-07-10	1.00	July Journal	stephan luiz	2023-07-10	stephan luiz	2023-11-22
		2023-07-05	100.00	July Journal 2	stephan luiz	2023-07-05	stephan luiz	2023-11-22
0000012		2023-06-06	200.00	June Journal	stephan luiz	2023-06-06	stephan luiz	2023-11-22
0000011		2023-06-05	200.00	closing account	stephan luiz	2023-06-05	stephan luiz	2023-06-06

Print

View / Edit

Clone

Delete

This will also redirect you to the journal page, where all the information is preloaded, allowing you to add any extra details for the duplicated journal.

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New Journal

Date: 2023-11-22

External Ref. #: External Ref. #

Currency: Account Currency

Document: Choose File No file chosen

Description: Journal 1

Account Name	Description	Debit	Credit	Amount (USD)
Partner Expenses - USD (11)		USD 71.3	USD	71.30
petty cash - USD (123)		USD	USD 71.3	71.30

+ Add another line

Summary

Debit: USD 71.30

Credit: USD 71.30

Save

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!