

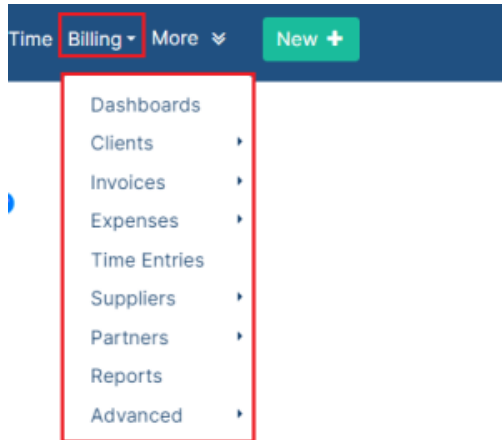
How to customize invoice template?

Objectives

- Customize invoice template (Add template/ upload your logo/ manage template details...)

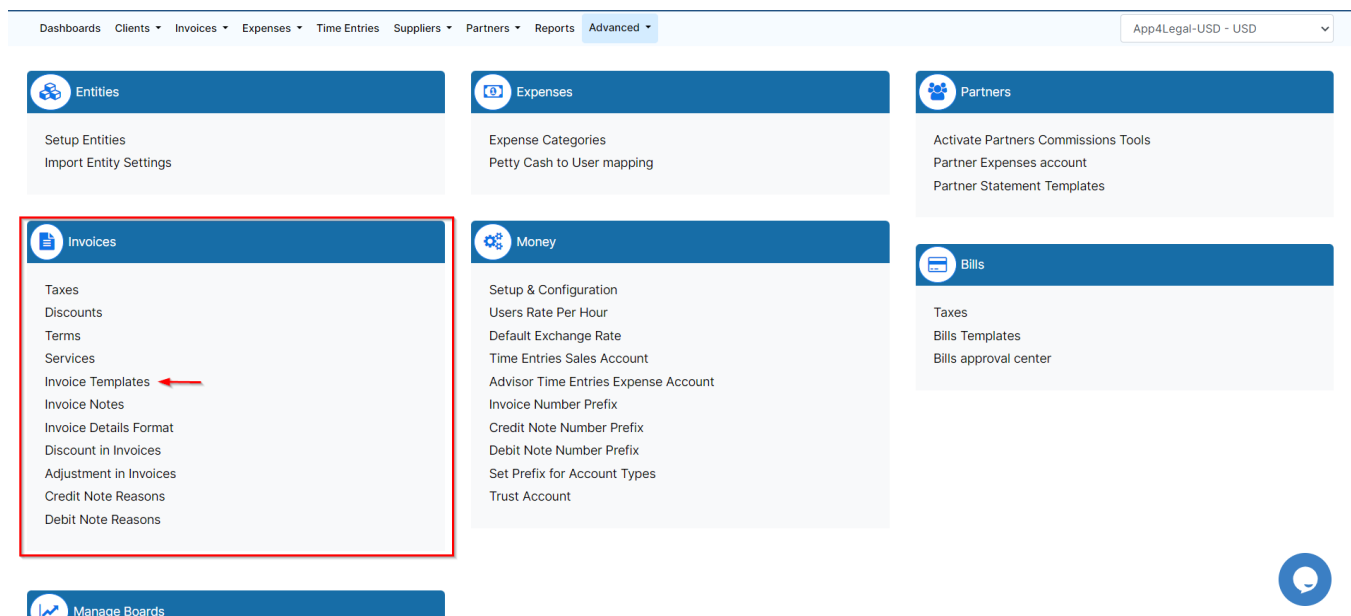
Steps

Invoice Templates could be configured from the Invoices settings. Therefore, Click on **Billing Advanced Settings** from the main menu.



The admin will be guided to a page where he will be able to set up billing settings including the **Invoices**.

From the **Invoices** section, click on the **Invoice Templates** hyperlink. Invoice templates are used in the exported form of the Invoice.



From the **List of Templates Per Entity** page, you can add templates from **Add New Template** hyperlink, **customize**, **clone**, **rename**, or **delete** the existing templates.



A default Invoice Template will be generated automatically upon sign-up or creation of a new entity.

Settings / Invoice Templates / Confidential Cases template

Properties

Header

Body

Footer

Layout

Page Size: ☐ A4 ☒ Letter ☐ Legal

Page Orientation: ☒ Portrait ☐ Landscape

Font

Page Font:

Save

MyCompany Ltd
Registration #: Rivers Building
13 Fox Street
London W1T 1JY
United Kingdom
Phone (878) 7890741
Fax (878) 7890741
www.mycompany.com

COMPANY NAME
Company Slogan

INVOICE

Matter ID: M0001
Matter Name: Child Adoption
Internal Ref Number: REF 2018/4386
Client: INFO - SAL
Attention to: Mr James
London, United Kingdom
Tax Number: 125595545

Invoice #: INV-201
Ref: REF-201
From: 2023-12-07
To: 2023-12-07
Terms: Due on Date
P.O#: 5001

Expenses

Date	Item	Description	Quantity	Unit Price	Discount	Tax	Amount (USD)
2023-12-07	Expert Fees		2	225	0%	0%	450.00
Total (USD):							450.00

Time Logs

Date	Attorney	Activity	Time	Rate	Discount	Tax	Amount (USD)
2023-12-07	JC	Filing request	4	450	0%	0%	1800.00
2023-12-07	JC	Respond to office action	1	900	0%	0%	900.00
2023-12-07	TE	Consultation with client	3	375	0%	0%	1125.00

Then, from the **Header** tab, you will be able to upload your logo by simply clicking on **"Upload Logo "** and selecting the logo of your company.

You have the Firm's Description section also where you can add all the company information such as the registration number, address, email, and phone number.

Settings / Invoice Templates / Confidential Cases template

Properties

Header

Body

Footer

Logo

☒ Show Logo

☐ Left ☐ Center ☒ Right

☐ Full Header Image layout

☒ Modify Image Size
The image will be scaled to a maximum of 350 x 350 pixels

Upload Logo

Max File size accepted is 1MB

Firm's Description

☒ Show

System Font 10pt B I U

MyCompany Ltd
Registration #: Rivers Building
13 Fox Street
London W1T 1JY
United Kingdom
Phone (878) 7890741
Fax (878) 7890741

Save

MyCompany Ltd
Registration #: Rivers Building
13 Fox Street
London W1T 1JY
United Kingdom
Phone (878) 7890741
Fax (878) 7890741
www.mycompany.com

COMPANY NAME
Company Slogan

INVOICE

Matter ID: M0001
Matter Name: Child Adoption
Internal Ref Number: REF 2018/4386
Client: INFO - SAL
Attention to: Mr James
London, United Kingdom
Tax Number: 125595545

Invoice #: INV-201
Ref: REF-201
From: 2023-12-07
To: 2023-12-07
Terms: Due on Date
P.O#: 5001

Expenses

Date	Item	Description	Quantity	Unit Price	Discount	Tax	Amount (USD)
2023-12-07	Expert Fees		2	225	0%	0%	450.00
Total (USD):							450.00

Time Logs

Date	Attorney	Activity	Time	Rate	Discount	Tax	Amount (USD)
2023-12-07	JC	Filing request	4	450	0%	0%	1800.00
2023-12-07	JC	Respond to office action	1	900	0%	0%	900.00
2023-12-07	TE	Consultation with client	3	375	0%	0%	1125.00

From the **Body** tab, you can customize the styles, choose the invoice Title, and select the information that you want to show on the invoice such as the matter name, invoice number, dates, and so on.

Settings / Invoice Templates / Confidential Cases template

Properties

Header

Body

Footer

Styles

Invoice Body Top Spacing: 0.38 in

Invoice Information Font: 10 pt

Invoice Tables' Header Font: 10 pt

Invoice Tables Font: 10 pt

Invoice Summation Font: 10 pt

Invoice Notes Font: 10 pt

Tables' Titles Font: 12 pt

Tables' Headers Background Color:

Tables' Titles Alignment: ☐ Left ☒ Center ☐ Right

Tables' Borders: ☐ None ☐ Rows ☐ Columns ☒ Both

Invoice Margins:

Save

MyCompany Ltd
Registration #: Rivers Building
13 Fox Street
London W1T 1JY
United Kingdom
Phone (878) 7890741
Fax (878) 7890741
www.mycompany.com

COMPANY NAME
Company Slogan

INVOICE

Matter ID: M0001
Matter Name: Child Adoption
Internal Ref Number: REF 2018/4386
Client: INFO - SAL
Attention to: Mr James
London, United Kingdom
Tax Number: 125595545

Invoice #: INV-201
Ref: REF-201
From: 2023-12-07
To: 2023-12-07
Terms: Due on Date
P.O#: 5001

Expenses

Date	Item	Description	Quantity	Unit Price	Discount	Tax	Amount (USD)
2023-12-07	Expert Fees		2	225	0%	0%	450.00
Total (USD):							450.00

Time Logs

Date	Attorney	Activity	Time	Rate	Discount	Tax	Amount (USD)
2023-12-07	JC	Filing request	4	450	0%	0%	1800.00
2023-12-07	JC	Respond to office action	1	900	0%	0%	900.00
2023-12-07	TE	Consultation with client	3	375	0%	0%	1125.00

Settings / Invoice Templates / Confident Cases template

Properties

Header

Body

Footer

Title


☒ Show
English Invoice
Français Facture
العربية فاتورة

Invoice Information

☐ Show Matter Info On All Pages
☒ Show Matter ID
☒ Show Matter Name
☒ Show Internal Ref Number
☒ Show Bill To
☒ Show Tax Number
☒ Show Invoice #
☒ Show Invoice Ref
☒ Show Date
☒ Show Due On
☒ Show Terms

Save

MyCompany Ltd
Registration #: 123456789
Riverside Building
123 Fox Street
London W1T 1JY
United Kingdom
Phone (878) 7890123
Fax (878) 7890141
www.mycompany.com


COMPANY NAME
Company Slogan

Matter ID: M0001
Matter Name: Child Adoption
Internal Ref Number: REF 2018/4366
Client: INFO - SAL
Attention to: Mr James
London, United Kingdom
Tax Number: 123456789

INVOICE

Invoice #: INV-201
Ref: REF-201
From: 2023-12-07
To: 2023-12-07
Terms: Due on Date
P.O#: 5001

Expenses

Date	Item	Description	Quantity	Unit Price	Discount	Tax	Amount (USD)
2023-12-07	Expert Fees	2023-12-07	2	225	0%	0%	450.00
Total (USD):							450.00

Time Logs

Date	Attorney	Activity	Time	Rate	Discount	Tax	Amount (USD)
2023-12-07	JC	Filing request	4	450	0%	0%	1800.00
2023-12-07	JC	Respond to office action	1	900	0%	0%	900.00
2023-12-07	TS	Consultation with client	3	375	0%	0%	1125.00

You can also select the invoice information, append matter and invoice custom fields, and manage the line items order for expenses, time logs, bill items, and services.

Additionally, you can manage here the appearance of time logs settings, Invoice summary, and upload signatures as well.

Properties

Header

Body

Footer

Additional Options

☒ Show Tables' Titles

☒ Show Item Column

☒ Show Description Column

☐ Show Service Categories without Subcategories

☒ Show Table Sub Total

☐ Show Invoice Amount In Letters

☐ Sub Total After Discount

☐ Show Paid Amount

☐ Show Entity Currency

☒ Show Notes

Number Format

American number formatting

Date Format

Short (2023-12-07)

Line Amount Value

Tax Included

Append matter custom fields to note

Append invoice custom fields to note

Save

Properties

Header

Body

Footer

Tables Order

Expenses

Time Entries

Services

Bill Items

☐ Merge bill items under expenses table

Time Entries Settings

Show Summary

No summary

☐ Time Logs Rebuild Description

Invoice Summary

☐ Show Description Table

☐ Show Categories Total

Signature

☐ Show Signature

Note

Authorized Signature

Upload Signature

Save

Finally, from the **Footer** tab, you can show the page number and add a footer to your template.

Settings / Invoice Templates / Confidential Cases template

Properties

Header

Body

Footer

Page Numbering

Show Page Number

Notes

Show Footer Text

System Font10ptB I U

www.lexzur.com

Save

2023-12-07	JC	Respond to office action	1	900	0%	0%	900.00
2023-12-07	TS	Consultation with client	2	270	0%	0%	540.00
Total (USD):							3,240.00
Items							
Date	Service	Description	Quantity	Unit Price	Discount	Tax	Amount (USD)
2023-12-07	Communication	Call the company and get some information	2	500	0%	0%	1000.00
Total (USD):							1,000.00
Bill Items							
Date	Item	Description	Quantity	Unit Price	Discount	Tax	Amount (USD)
2023-12-07	IT Expenses	IT Expenses	1	200	0%	0%	200.00
Total (USD):							200.00
Sub Total:							4890.00
Total Discount:							0.00
Total Tax:							0.00
Total (USD):							4890.00
Thank you for your business.							
www.lexzur.com							

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!