

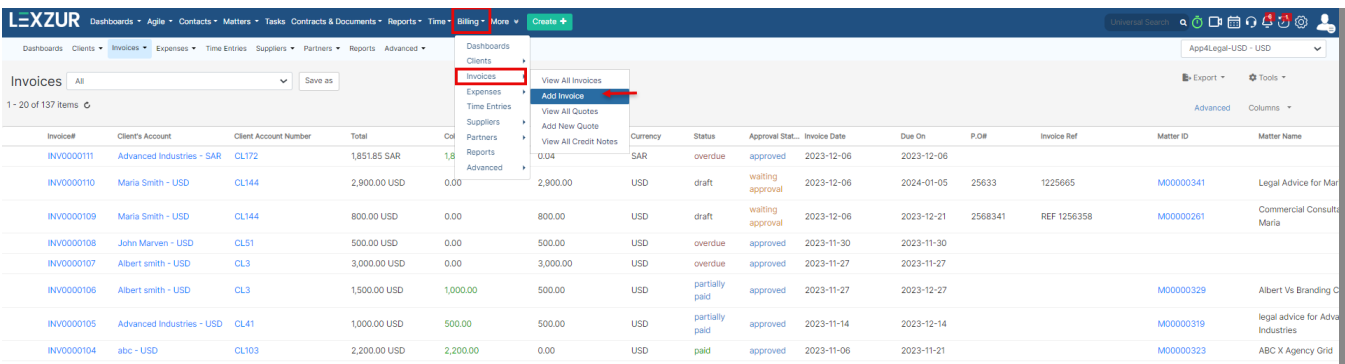
How to Invoice Your Clients

Objectives

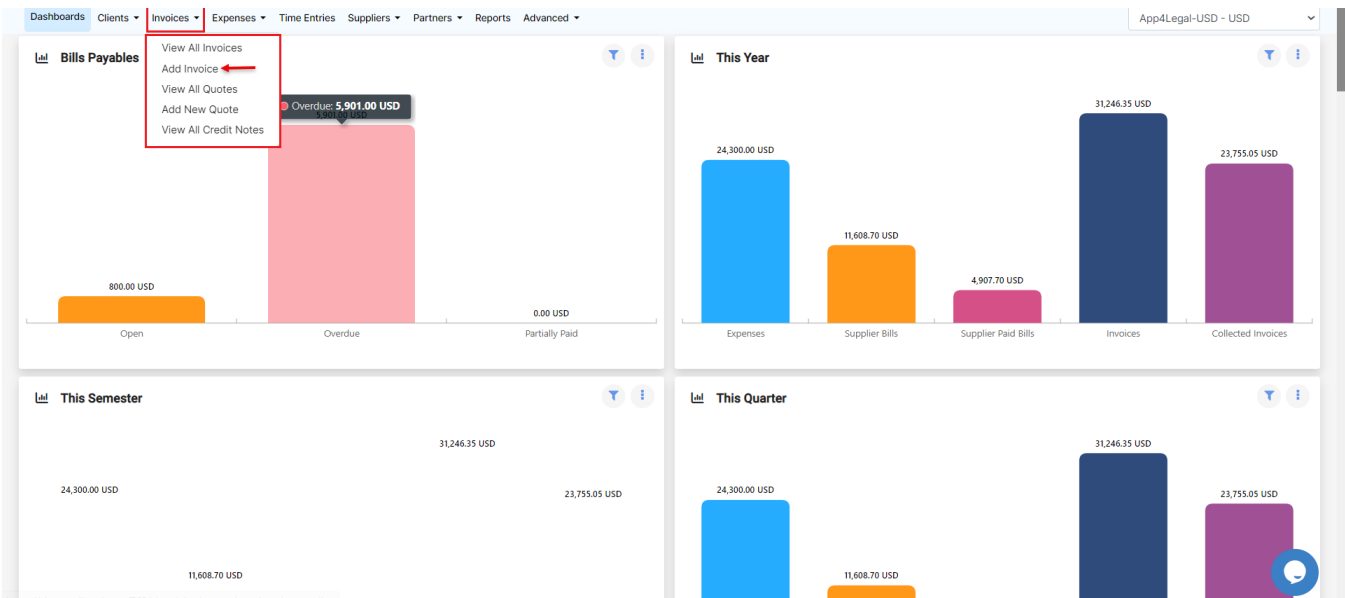
- Add new Invoices

Steps

From the main menu, click on **Billing Invoices Add Invoice** to add a new invoice.



Under the Invoices sections, you can view the list of invoices, add invoices, and quotes, and access the credit note list as well.



You will be redirected to the Add New Invoice page, where you need to go through some steps.

- **Client:**

The first step is Client related. Therefore, specify the Client's Account, and choose the invoice template from the predefined list of templates (you can click on **Customize Template** to add a new template if needed).

An invoice number is a sequential number. It can default to start from a certain Value. The invoice # keeps on incrementing.

The client's details such as the address, Tax number, bill to address, and so on, are all fields retrieved automatically from the contact's page, and you can edit them on the fly.

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App4Legal-USD - USD

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Client Account

Advanced Industries

Invoice Templates

app4legal template

Invoice Number

INV0000096

COM0000038: Advanced Industries

Currency: USD

Tax Number: N896325

Bill To: Advanced Industries
NewYork, United States

Invoice

Customize Template

Skip to Items >>

Next >

• Matters:

The next step is to link matters along with their corresponding time logs, expenses, and bills to the invoice.

 Skip to Items directly if you don't want to link matters

Under the Matters Page, you will find all the matters (corporate matters, litigation cases, and matter containers) related to the selected client, where you can select the matters that you want to link to your invoice.

You can easily filter the type of matters you want to show on this page.

Additionally, you can search by the Matter Name, Practice Area, Assignee, and Status.

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Matters Related to Maria Smith

Corporate Matter, Litigation Case, Matter Container

Matter	Matter Name	Practice Area	Assignee	Status	Billing Status	Billing Method	Time Logs / Expenses / Bill Items
Type	Type	Select	Type	Select	Select	Select	
<input checked="" type="checkbox"/> M00000341	Legal Advice for Maria	Real Estate	Carolina Robinson	In Progress	Involved	Hourly Rate	<div>2 Time Logs</div> <div>4 Expenses</div> <div>3 Bill Items</div>
<input checked="" type="checkbox"/> M00000239	legal advice for Maria	Commercial	Carolina Robinson	Done	Involved	Hourly Rate	<div>2 Time Logs</div> <div>0 Expenses</div> <div>0 Bill Items</div>
<input checked="" type="checkbox"/> M00000333	Commercial Consultation	Commercial	(No Data)	1-Review	Involved	Hourly Rate	<div>1 Time Logs</div> <div>1 Expenses</div> <div>0 Bill Items</div>
<input type="checkbox"/> M00000261	Commercial Consultation for Maria	Commercial	Carolina Robinson	1-Review	Involved	Fixed Fee	<div>0 Time Logs</div> <div>0 Expenses</div> <div>0 Bill Items</div> <div>Fixed Fee:5000.00</div>
<input type="checkbox"/> M00000285	Legal Advice for Banking Issue	Banking & finance	James Marvin	2-In Progress	To-Invoice	Hourly Rate	<div>0 Time Logs</div> <div>0 Expenses</div> <div>0 Bill Items</div>
<input type="checkbox"/> M00000290	PIRONOI	Civil	Carolina Robinson	Closed	Involved	Hourly Rate	<div>0 Time Logs</div> <div>0 Expenses</div> <div>0 Bill Items</div>

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Next >

Import the Time Logs, Expenses, and Bill items related to the matters you selected, then submit and continue.

You can also filter the time logs by date before selection.



You have the option to add Tax or Discount at the level of all the imported time logs.

Import Time Logs



> Time Logs Still in Draft Vouchers

2

Filter by Date select an option yyyy-mm-dd Apply Clear

Time Logs	Date	Description	Category	User	Effort	Rate	Matter/Task
<input checked="" type="checkbox"/>	2023-06-15	(No Data)	Drafting	Carolina Robinson (UC1)	1.00	300	Matter: legal advice for Maria
<input checked="" type="checkbox"/>	2023-12-01	(No Data)	(No Data)	Carolina Robinson (UC1)	1.00	300	Matter: Commercial Consultation
<input type="checkbox"/>	2023-12-05	(No Data)	Meeting	Carolina Robinson (UC1)	2.00	300	Matter: Legal Advice for Maria
<input type="checkbox"/>	2023-12-06	Team Meeting	Administration- Team Meeting	Carolina Robinson (UC1)	1.50	300	Matter: Legal Advice for Maria
<input type="checkbox"/>	2023-12-11	(No Data)	(No Data)	Maria Dave (UC23)	1.50	200	Matter: legal advice for Maria

Options

- ☐ Group time logs by legal practitioner per matter
- ☒ Use User FullName
- ☐ Use User Code

Discount Discount (10.00%) X ▼ Tax VAT (11.00%) X ▼

2 items selected

X Cancel ✓ OK

Items:

In the third step, you will view all imported time logs, expenses, and Bill items, or you can add additional services.

At the level of each added item, you can edit their details, delete lines, or add partner shares.

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Client

Matters

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Additional Info

Add Service

Import Time Logs

Import Expenses

Import Bill Items

Time Logs

Date	User	Description	Effort	Rate	Discount	Tax	Amount
2022-01-18	Alice Jones	Hearing	1	300	0%	0%	300 USD
2023-02-03	Alice Jones	Drafting	1.75	320	0%	0%	560 USD
2023-04-05	Carolina Robinson	Hearing	1	300	0%	0%	300 USD

Expenses

Date	Expense Category	Description	Quantity	Expense Amount	Discount	Tax	Amount
2022-05-27	Advance of Expert Fee	2022-05-27	1	1,000	0%	0%	1,000 USD

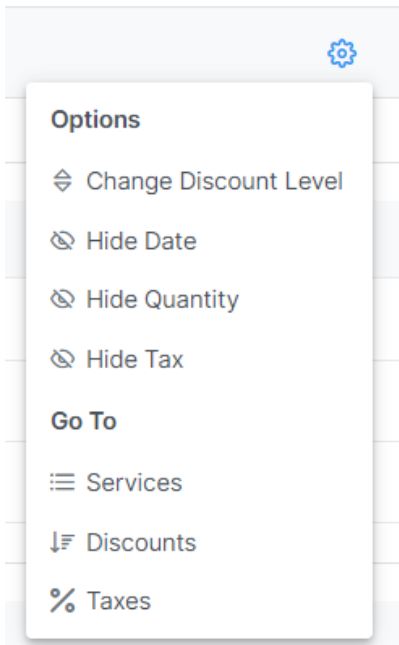
Bill Items

Date	Account Name	Description	Quantity	Unit Price	Discount	Tax	Amount
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Moreover, the action wheel on the top right, allows you to do further modifications such as changing the discount level, therefore, you can perform discounts on the level of each item in the invoice, on the level of the invoice total amount before tax, and on the level of the invoice total amount after-tax. This advanced option will allow more flexibility when invoicing your clients.



To add a new service you can simply choose from a list of predefined services and you can add a new one on the fly.

Add Service

Services

Start typing

+ New Service

Service Name	Description	Unit Price	Tax
<input type="checkbox"/> Annual Legal Mgt.	(No Data)	6,000 USD	(No Tax)
<input type="checkbox"/> Office Expenses	Average monthly expenses	500 USD	(No Tax)
<input type="checkbox"/> Consultancy	(No Data)	500 USD	(No Tax)
<input type="checkbox"/> Incorporation	(No Data)	2,000 USD	(No Tax)
<input checked="" type="checkbox"/> Legal Docs	(No Data)	300 USD	(No Tax)
<input type="checkbox"/> Stamps	(No Data)	100 USD	(No Tax)
<input checked="" type="checkbox"/> Translation	(No Data)	100 USD	(No Tax)
<input type="checkbox"/> fees	(No Data)	200 USD	(No Tax)
<input type="checkbox"/> Fixed Fees	(No Data)	0 USD	(No Tax)

2 items selected

Cancel

OK

Additionally, you can import expenses that are not related to matters, so all client-related expenses can now be invoiced.

Click on the Import Expenses button, it will allow you to import either expenses related to matters or miscellaneous expenses.

Expenses Still in Draft Vouchers

Expenses Related to Matters

Paid On	Category	Amount	Tax	Total Amount	Paid Through	Billing Status	Matter	Comments	
<input checked="" type="checkbox"/>	2023-11-10	Flight	909.09 USD	VAT 10 (10.00%)	1,000 USD	Alice Petty Cash	to-invoice	Legal Advice for Maria	(No Data)
<input checked="" type="checkbox"/>	2023-12-01	Internet & Telephone	500 USD	(No Tax)	500 USD	Alice Petty Cash	to-invoice	Legal Advice for Maria	(No Data)
<input type="checkbox"/>	2023-12-05	Internet & Telephone	200 USD	(No Tax)	200 USD	Alice Petty Cash	to-invoice	Legal Advice for Maria	(No Data)
<input type="checkbox"/>	2023-12-06	Contribution to the Judges Funds	90.09 USD	VAT (11.00%)	100 USD	Alice Petty Cash	to-invoice	Legal Advice for Maria	(No Data)
<input type="checkbox"/>	2023-12-11	Appeal Fee	1,500 USD	(No Tax)	1,500 USD	Alice Petty Cash	to-invoice	Commercial Consultation	(No Data)

Miscellaneous Expenses

Paid On	Category	Amount	Tax	Total Amount	Paid Through	Billing Status	Comments	
<input checked="" type="checkbox"/>	2023-10-05	Translation	50 USD	(No Tax)	50 USD	Alice Petty Cash	not-set	(No Data)
<input type="checkbox"/>	2023-10-25	Appeal Fee	200 USD	(No Tax)	200 USD	Cash account	not-set	(No Data)

3 Items selected

Cancel OK

Last but not least, the additional info page is where you must specify some additional invoice details, such as the P.O#, Terms, Date, and Due Date.

A system reminder can also be set up to notify you before a specific deadline for the invoice.

Furthermore, you can include payment details and bank account details or any specific details on your invoices via predefined notes.

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Client Matters Items Additional Info

Invoice Ref

Invoice Ref

P.O#

P.O#

Terms

30 Days

Date

2023-03-08

Due Date

2023-04-07

Reminder

ON

Notify Me Before

5 Day(s)

Also Send an Email

Status

DRAFT OPEN

Description

Description

Notes

Bank Details

For the settlement of the invoice please use the below medium:

1- Wire transfer or Local Deposit:

Bank name:Bank ABC

Account name:555256256

IBAN:US-23265235

Swift Code:1334

Back Save

- Invoice Ref:** This Reference appears in the Invoice Details exported Excel form.
- PO#:** Purchase Order of the Invoice.
- Terms:** Choose from a set of terms defined within the system or you can add new terms for your invoice from the settings.

You can also change the status of the invoice from "Draft" to "Open". Draft means that no impact on the Related Accounts (Expense Accounts and Client Accounts) shall take place after saving this Invoice. If the Invoice is created as Open, automatically the Accounts are debited and credited as per the transaction of the Invoice.

Your invoice is now ready:

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General Info

Payment Made

Attachments

Email

INV0000055

PAID

Advanced Industries - USD

Advanced Industries NewYork, United States

Date

2023-03-08

Due On

2023-04-07

Reference Number

(No Data)

Terms

30 Days

P.O.#

(No Data)

Description

(No Data)

Matters Linked

Summary

Sub Total

USD 3,320.00

Total Discount

USD 0.00

Sub Total After Discount

USD 3,320.00

Total Tax

USD 0.00

Total

USD 3,320.00

Invoice Template

template example

Invoice Status

Paid

Approval Status

Approved

Customize Template

Your Business Name

Your Registration Number

Your Street

City, State, Country

Your Phone Number

Your Website

COMPANY NAME

Company Slogan

INVOICE

Matter ID: 00000036, 00000067

Matter Name: Advanced Industries Vs Johnny Dev, Administrative for Advanced Industries

Bill To: Advanced Industries NewYork, United States

Tax Number: N896325

Invoice #: INV0000055

Status: Paid

Date: 2023-03-08

Due On: 2023-04-07

Terms: 30 Days

Description	Amount
Items	400.00 USD
Expenses	800.00 USD
Time Logs	2,120.00 USD
Sub Total	3,320.00 USD
Total Discount	0.00 USD
Total Tax	0.00 USD
Total (USD)	3,320.00 USD
Paid Amount	3,320.00 USD
Remaining Amount	0.00 USD

You can now preview your invoice using selected templates, view its details, and change its status or the approval status.

Also, the list of actions on the **General Info** page allows you to edit, send emails, print, export to Word or to PDF based on the predefined templates, and delete.

⚠

Invoices must be set as a draft to edit them, and only open and draft invoices could be deleted.

✅

You can customize your own Invoice Templates to be used in previewing or exporting invoices. [Learn more here.](#)

Whenever you receive payments, you can easily record them. The Payment Made page allows you to see all payments made on the invoice, with the option to print a receipt.

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General Info

Payment Made

Attachments

Emails

Client:

Advanced Industries - USD (41)

Invoice Number:

INV0000055

Total (USD)	3,320.00
Payment Made (USD)	3,320.00
Credit Notes (USD)	0.00
Balance Due (USD)	0.00

Payment Made

Paid On

2023-03-09

Payment Method

Bank Transfer

Amount

3,320.00

Currency

USD

Reference #

3000

Deposit To

Alice Petty Cash

Actions

Record Payment

✅

Learn more about how to settle payments on invoices in this [guide](#).

You can also send Invoices automatically from the system by using an embedded **Email Engine** and track all the related email conversations. Learn more [here](#).

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

Thank you!