

How to E-invoice your clients?

Objectives

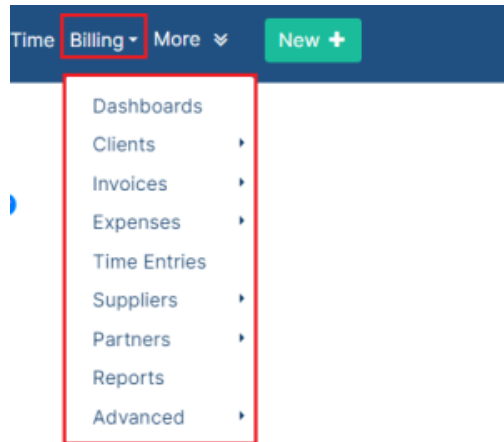
- [Activate E-invoicing](#)
- [Create Invoice](#)

Steps

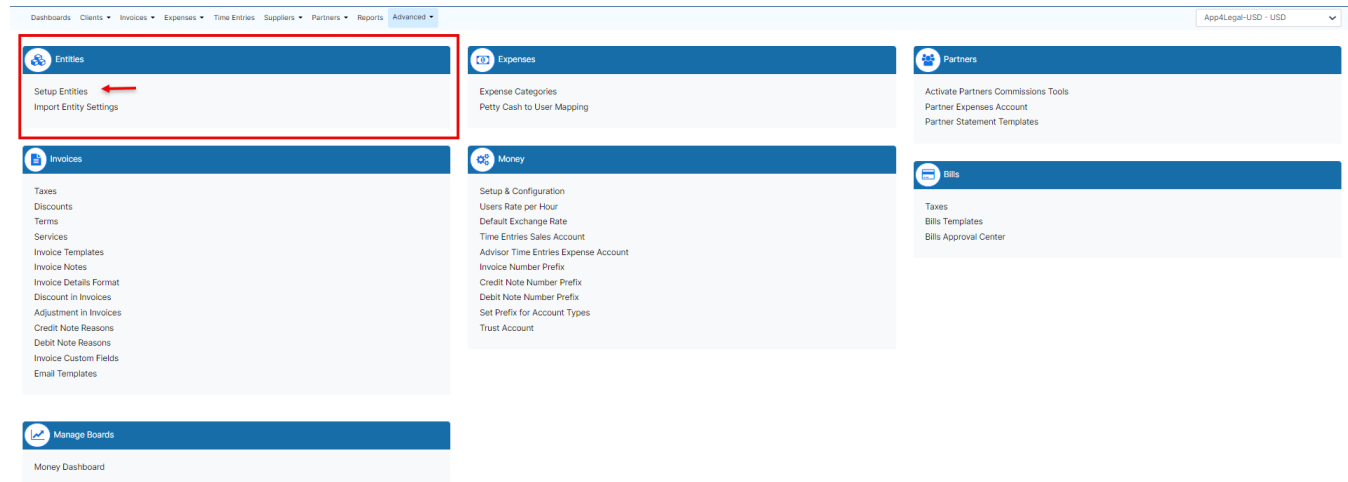
In LEXZUR you can e-invoice your clients. You can activate this option following a set of simple steps.

- **Activate E-Invoicing:**

First, from the **Billing** in the main menu, go to the **Settings**, within the **Advanced** options.



Under **Entities**, choose **Setup Entities**.



Choose the Entity for which you want to activate the E-invoice option and click on the green edit button. Go to the E-invoicing field and choose Active. Make sure to add all the fields like the address details, tax number, and phone, then click Save.

Edit Entity

Entity Name*	<input type="text" value="My First Instance-AED"/>	Menu Color	<input type="text" value=""/>
Base Currency*	<input type="text" value="AED"/>	Fiscal Year Starts On*	<input type="text" value="February"/>
Address1	<input type="text" value="Address1"/>	ID	<input type="text" value="ID"/>
Address2	<input type="text" value="Address2"/>	City	<input type="text" value="City"/>
Zip	<input type="text" value="Zip"/>	State	<input type="text" value="State"/>
Website	<input type="text" value="Website"/>	Country	<input type="text" value="None"/>
Fax	<input type="text" value="Fax"/>	Phone	<input type="text" value="Phone"/>
Comments	<input type="text" value="Comments"/>	Mobile	<input type="text" value="Mobile"/>
E-Invoicing	<input type="text" value="Active"/>	Tax Number	<input type="text" value="Tax Number"/>
<input type="button" value="Save"/>			

⚠ Changing this value is not reversible, Once you enable the e-invoicing, you cannot disable it later for the current entity

After Activating this feature, E-invoicing will be applied to this specific Entity. You could always have multiple entities. Therefore, this feature could apply to entities for which e-invoicing is required. Now, let's have an example of how to e-invoice a client.

• Create Invoice:

Go to Invoices and create a new invoice. You must follow some steps.

First, the Client's Details: Specify the Client's Account, and choose the invoice template from the predefined list of templates.

⚠ Once the invoice is saved as open, the system will provide the invoice number automatically

Client

Client Account

BLP Industry

Invoice Templates

BLP Template

Prefix Type

Invoice Number Prefix

Invoice Number

INV0000112

COM00000059: BLP Industry

Currency: AED

Exchange Rate: 1 AED = 0.8 USD

Tax Number: 1222

Bill To: BLP Industry

King Street 123

12345, Riyadh, Saudi Arabia

Matters

Items

Additional Info

Business Name: BLP Industries

Registration Number: 125635

Street: Oxford Street

City, State, Country: United Kingdom

Phone Number: 2565 2563 896

Website: BLPindustries.com

LAW FIRM

Invoice

www.blpindustries.com

Skip to Items >>

Next >

The client's details such as the address, Tax number, and so on, are all fields required by ZATCA. Therefore, these details will be retrieved automatically from the contact's page, and you can edit them on the fly.

Edit Client

Tax Number: 1222

Additional ID Type: Commercial Registration

Additional ID Value: 1344

Country: Saudi Arabia

City: Riyadh

State: Riyadh

Address: King Street 123

Street Name: King Street

Additional Street Name: KSA

Building Number: 12

Address Additional Number: 5194

Zip: 12345

[Cancel](#) [Save](#)

The next step is to link matters along with their corresponding time logs, expenses, and bill items 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 related to the selected client, where you can select the matters that you want to link to your invoice. Additionally, you can search by the Matter Name, Practice Area, Assignee, and Status.

Matters Related to BLP Industry

Corporate Matter, Litigation Case, Matter Container

Matter	Matter Name	Practice Area	Assignee	Status	Billing Status	Billing Method	Time Logs / Expenses / Bill Items
<input type="checkbox"/> M00000245	Legal opinion	Legal opinion	Jim Batz	In Progress	To-Invoice	Hourly Rate	10 Time Logs 0 Expenses 0 Bill Items
<input type="checkbox"/> M00000315	BLP VS ABC Services	Real Estate	Carolina Robinson	Drafting	To-Invoice	Hourly Rate	3 Time Logs 0 Expenses 0 Bill Items
<input type="checkbox"/> M00000283	BLP Industry x ABC services	Commercial	Alice Jones	3-Closed	To-Invoice	Hourly Rate	1 Time Logs 0 Expenses 0 Bill Items
<input type="checkbox"/> M00000092	Legal Opinion for BLP	Administrative	James Marven	Cancelled	Invoiced	Hourly Rate	0 Time Logs 0 Expenses 0 Bill Items
<input type="checkbox"/> M00000102	Business Card Reader	Case of Intellectual Property	Aleen Peterson		To-Invoice	Hourly Rate	0 Time Logs 0 Expenses 0 Bill Items
<input type="checkbox"/> M00000104	BLP x ALvah	Constitutional Court	James Marven	In Progress	Invoiced	Hourly Rate	0 Time Logs 0 Expenses 0 Bill Items

[Back](#) [Next](#)

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

You can filter the time logs by date prior to the selection.



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

Import Time Logs



Filter by Date

<input type="checkbox"/>	Date	Description	Category	User	Effort	Rate	Matter/Task
<input checked="" type="checkbox"/>	2023-10-05	(No Data)	(No Data)	Carolina Robinson (UC1)	1.00	300	Matter: BLP Industry x ABC services
<input type="checkbox"/>	2023-10-30	(No Data)	(No Data)	Carolina Robinson (UC1)	1.00	300	Matter: BLP VS ABC Services
<input type="checkbox"/>	2023-11-01	(No Data)	(No Data)	Carolina Robinson (UC1)	1.00	300	Matter: BLP VS ABC Services
<input type="checkbox"/>	2023-11-07	(No Data)	Administration- Training Session	Carolina Robinson (UC1)	1.00	300	Matter: BLP VS ABC Services

Options

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

Tax

1 items selected

Import Expenses



<input type="checkbox"/>	Paid On	Category	Amount	Tax	Total Amount	Paid Through	Billing Status	Matter	Comments
<input checked="" type="checkbox"/>	2023-04-05	Judgment Fee	500 USD	(No Tax)	500 USD	Supplies	to-invoice	Legal opinion for service agreement for BLP	(No Data)
<input type="checkbox"/>	2023-04-05	Fines	500 SAR	(No Tax)	500 SAR	Office	to-invoice	Legal opinion for Service Agreement for BLP	(No Data)

<input checked="" type="checkbox"/>	Paid On	Category	Amount	Tax	Total Amount	Paid Through	Billing Status	Comments
<input checked="" type="checkbox"/>	2023-03-08	Fines	3,000 SAR	(No Tax)	3,000 SAR	Office	to-invoice	(No Data)

2 items selected

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

The import Expenses window will allow you to select from expenses related to matters or miscellaneous expenses.

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

Client

Matters

Items

Additional Info

Add Service

Import Time Logs

Import Expenses

Import Bill Items

Time Logs

Date	User	Description	Effort	Rate	Tax	Amount	
2023-04-05	Carolina Robinson	Hearing	1	5,000	0%	5,000 SAR	<div><div></div><div></div></div>

Expenses

Date	Expense Category	Description	Quantity	Expense Amount	Tax	Amount	
2023-04-05	Judgment Fee	2023-04-05	1	500	0%	500 SAR	<div><div></div><div></div></div>
2023-03-08	Fines	2023-03-08	1	3,000	0%	3,000 SAR	<div><div></div><div></div></div>

Bill Items

Date	Account Name	Description	Quantity	Unit Price	Tax	Amount	
2023-04-05	Office Supplies	Stationary supplies	1	100	0%	100 SAR	<div><div></div><div></div></div>

Back

Next

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 SAR	(No Tax)
<input type="checkbox"/> Office Expenses	Average monthly expenses	5,000 SAR	(No Tax)
<input type="checkbox"/> Consultancy	Legal Consultation	5,000 SAR	(No Tax)
<input type="checkbox"/> consultation	Legal Consultation	5,000 SAR	(No Tax)
<input type="checkbox"/> Incorporation	(No Data)	2,000 SAR	(No Tax)
<input type="checkbox"/> Legal Docs	(No Data)	3,000 SAR	(No Tax)
<input type="checkbox"/> Stamps	(No Data)	1,000 SAR	(No Tax)
<input checked="" type="checkbox"/> Translation	Legal Docs Translation	1,000 SAR	(No Tax)

1 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.

The screenshot shows the 'Invoice Ref' section with fields for 'Invoice Ref', 'P.O.#', 'Terms' (30 Days), 'Date' (2023-03-08), 'Due Date' (2023-04-07), 'Reminder' (ON), and 'Notify Me Before' (5 days). The 'Status' dropdown is set to 'DRAFT'. The 'Description' field is empty. The 'Notes' section contains bank details for 'Bank ABC' with account number '555256256', IBAN 'US-23265235', and Swift Code '1334'. The 'E-invoicing Required Fields' section is highlighted with a red box, showing 'Invoice Type' as 'Tax Invoice', 'Transaction Type' as 'Nominal', and 'Payment Method' as 'Credit transfer'. The 'Save' button is also highlighted with a red box.

The remaining fields, such as invoice type, transaction type, and payment method, are E-invoicing Required Fields and must be filled out as well:

- **Invoice Type:** It can be Tax Invoice, Simplified Tax invoice or Both
 1. **Tax Invoice:** A normal tax invoice as per KSA VAT regulation. Taxable Supplies subject to the standard rate valued at SAR 1,000 or more, made to a Taxable Person or non-taxable Legal Person. Taxable Supplies made to a non-taxable natural person (other than exports of goods).
 2. **Simplified Tax Invoice:** A simplified Tax Invoice may be issued for a Supply of Goods or services. A simplified tax invoice contains a lower number of fields as per KSA VAT regulation. Mainly B2C (business to consumer). Export of goods

The 'Invoice Type' dropdown menu is open, showing 'Tax Invoice' and 'Simplified Tax Invoice' as options.

- **Transaction Type:** Can be Nominal, Export, Summary or others
 1. **Nominal:** The invoice is issued for goods that are provided without consideration as per KSA VAT regulation.
 2. **Export:** The invoice is issued to a foreign buyer as per KSA VAT regulation.
 3. **Summary:** The invoice is issued for sales occurring over a period of time and occurs for some types of invoicing arrangements between seller and buyer.
 4. **Others**

The 'Transaction Type' dropdown menu is open, showing 'Nominal', 'Export', 'Summary', and 'Others' as options.

- **Payment Method:** Can be Cash, Credit Transfer, Payment to a bank account, Bank card or Instrument not defined
 1. **In Cash:** Payment by currency (including bills and coins) in circulation, including checking account deposits.
 2. **Credit Transfer:** Payment by credit movement of funds from one account to another.
 3. **Payment to bank account:** Payment by an arrangement for settling debts that is operated by the Post Office.
 4. **Bank Card:** Payment by means of a card issued by a bank or other financial institution.
 5. **Instrument not defined:** Not defined legally enforceable agreement between two or more parties (expressing a contractual right or a right to the payment of Billing).

Payment Method

Select Payment Method

Select Payment Method
 In Cash
 Credit transfer
 Payment to bank account
 Bank Card
 Instrument not defined

The invoice default status will be set as a draft. In other words, the system will not allocate an automatic number, unless you activate the invoice from the top right button, changing created the invoice status to open. When you choose open, the system will give this invoice an automatic unique identifier number.

Once the invoice is created, some restrictions will be applied, such as this invoice cannot be altered or deleted.

General Info
Payment Made
Attachments
Email

INV0000023

BLP industry - SAR

BLP industry 123 12345, 1234, Riyadh, Saudi Arabia... [Show More](#)

Date	2023-03-08
Due On	2023-04-07
Reference Number	(No Data)
Terms	30 Days
P.O#	(No Data)
Description	(No Data)
Invoice Type	Tax Invoice
Transaction Type	Nominal
Payment Method	Credit transfer

[Matters Linked](#)

Summary

Sub Total	SAR 8,600.00
Total Tax	SAR 0.00
Total	SAR 8,600.00

Invoice Template
Invoice Status
Approval Status

Zatca Invoice
Open
Approved

فانورة ضريبية
TAX INVOICE

Invoice #	INV0000023	مراج الفانورة
Date	2023-03-08	التاريخ
Due On	2023-04-07	تاريخ الاستحقاق
Exchange Rate	1 SAR = 1 SAR	سعر الصرف
Matter Name	Legal opinion for service agreement for BLP. Acquire the company of BLP	عنوان المسألة

Seller	المورد Buyer	العميل
Name	My instance-E-invoice	Name
	BLP industry	الاسم

You can now preview your invoice using selected templates, view its details, send emails, print, and export it to Word or to PDF based on the predefined templates, from the list of actions on the **General Info** page.



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

Once this invoice is exported, you will find all the required information and the QR Code. You can, therefore, send it to your client.

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.

General Info
Payment Made
Attachments
Email

INV0000023
PARTIALLY PAID

BLP industry - SAR
BLP industry 123 12345, 1234, Riyadh, Saudi Arabia... Show More

Date	2023-03-08
Due On	2023-04-07
Reference Number	(No Data)
Terms	30 Days
P.O#	(No Data)
Description	(No Data)
Invoice Type	Tax Invoice
Transaction Type	Nominal
Payment Method	Credit transfer

Matters Linked

Summary
Sub Total SAR 8,600.00
Total Tax SAR 0.00
Total SAR 8,600.00

Invoice Template: Zatca invoice
Invoice Status: Partially paid
Approval Status: Approved

فانورة ضريبية
TAX INVOICE

Invoice #	INV0000023	مرجع الفانورة
Date	2023-03-08	التاريخ
Due On	2023-04-07	تاريخ الاستحقاق
Exchange Rate	1 SAR = 1 SAR	سعر الصرف
Matter Name	Legal opinion for service agreement for BLP , Acquire the company of BLP	عنوان المسألة

Create Credit Note
Create Debit Note

When the client decides to discard a service that has been invoiced, a credit note should be created. Learn how to create credit notes in this [guide](#).

If you decide to include additional services or link more matters to your invoice, you must create a Debit Note. Learn how to create debit notes in this [guide](#).

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

Thank you!