

How to Define the User's Label to be Used in Invoicing Time Entries?

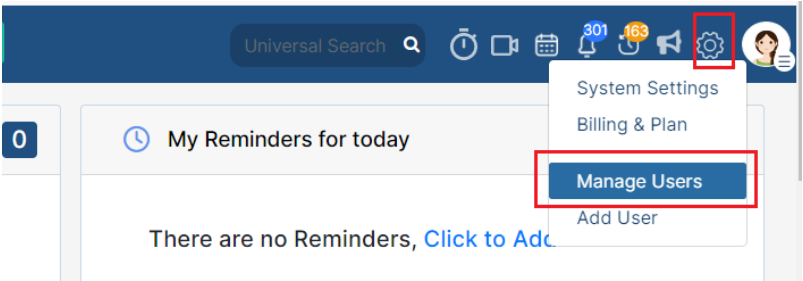
Objectives

- Define the user's label that will replace their names under the time entries in the invoice details.

Steps

In order to define the label that will be displayed in the user columns under time logs in the invoice, you must first specify the User Code from their Basic Information.

Go to **"Manage Users"** from the action wheel within the main menu.



Click on the ID related to the user then change the User code. The user code is unique to a specific user and can be used as an employee ID or a replacement for the user's full name when generating an invoice.

Settings / Search Users / Edit User

The number of licenses purchased for "Core" is (30) and the number of licenses used is (11)
The number of licenses purchased for "Contract" is (30) and the number of licenses used is (11)

Status: Active

Basic Information	Personal Information	Address	Comments
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First Name*

Sam

User Code*

SJ

Password*

Password

Confirm Password

Access type*

☒ Core ☒ Contract

Last Name*

Jones

Email*

samjones@gmail.com

User Group*

Legal Team

Seniority level*

Senior Lawyer Officer

Save

Clone

As part of the invoicing process, you have the option to select whether the user's full name or user code will appear in the user column under time logs in the invoice details.

Import Time Logs

Filter by Date

select an option

yyyy-mm-dd

Apply

Clear

Time Logs

☐

Date

☒

2023-04-05

(No Data)

(No Data)

James Marven (James UC8)

1.70

200

Matter: Legal opinion for Service Agreement for BLP

☐

2023-04-19

(No Data)

Meeting

James Marven (James UC8)

1.50

200

Matter: Advice for BLP

☒

2023-04-26

(No Data)

(No Data)

Carolina Robinson (UC1)

2.00

300

Matter: Legal Opinion for BLP

Options

☐

Group time logs by legal practitioner per matter

☐

Use User FullName

☒

Use User Code

Discount

select an option

Tax

select an option

2 items selected

Cancel

OK

The user code will be displayed in the label as you see in the below example.

Client

Matters

Items

Additional Info

Add Service

Import Time Logs

Import Expenses

Import Bill Items

Time Logs

Date	User	Description	Effort	Rate	Discount	Tax	Amount	
2023-04-05	James UC8	2023-04-05 - 1.70	1.7	740.74	0%	0%	1,259.26 AED	
2023-04-26	UC1	2023-04-26 - 2.00	2	1,111.11	0%	0%	2,222.22 AED	

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

Thank you!