

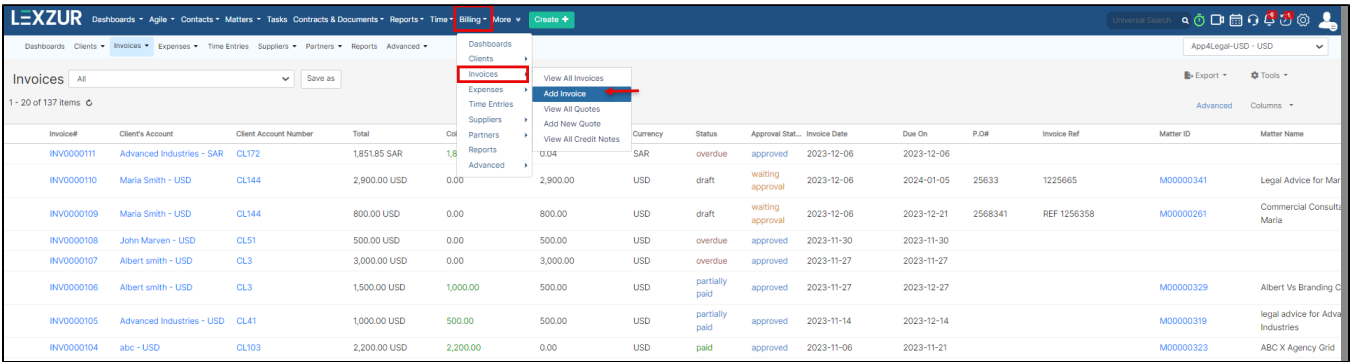
How to Invoice Your Clients

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.

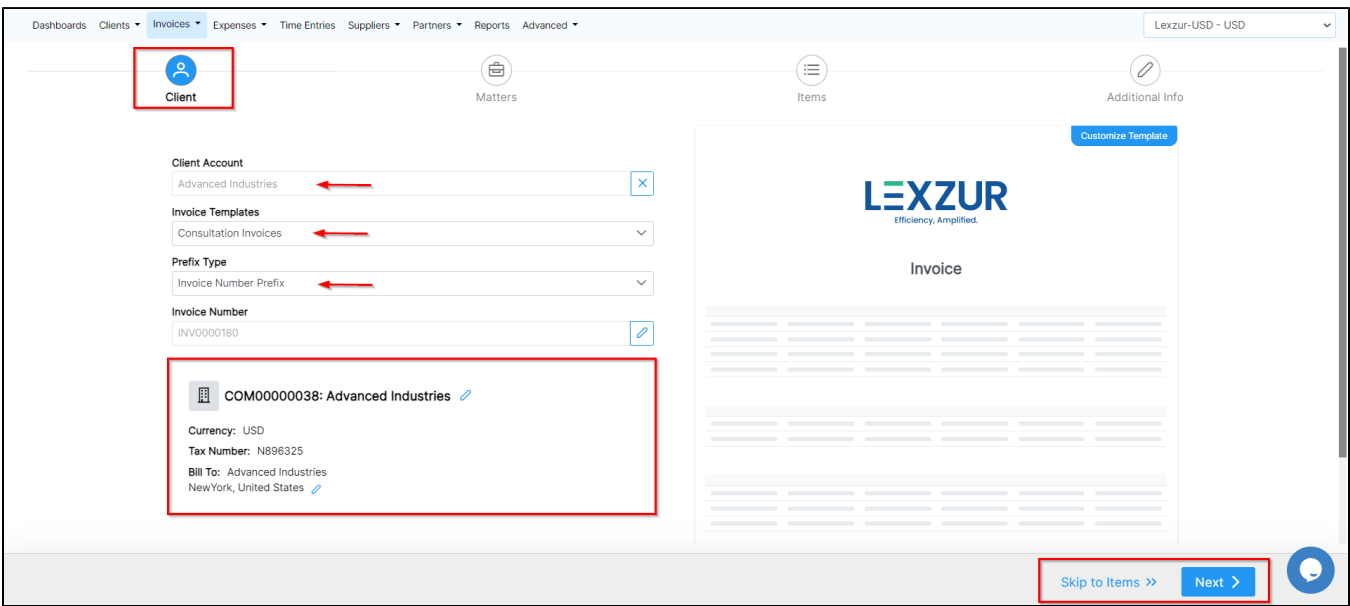
You will be redirected to the Add New Invoice page, where you need to go through some steps.

- **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.



- **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.

Navigation: Dashboards Clients **Invoices** Expenses Time Entries Suppliers Partners Reports Advanced App4Legal-USD - USD

Client Matters Items Additional Info

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
<input checked="" type="checkbox"/> M00000341	Legal Advice for Maria	Real Estate	Carolina Robinson	In Progress	Invoiced	Hourly Rate	2 Time Logs 4 Expenses 3 Bill Items
<input checked="" type="checkbox"/> M00000239	legal advice for Maria	Commercial	Carolina Robinson	Done	Invoiced	Hourly Rate	2 Time Logs 0 Expenses 0 Bill Items
<input checked="" type="checkbox"/> M00000333	Commercial Consultation	Commercial	(No Data)	1-Review	Invoiced	Hourly Rate	1 Time Logs 1 Expenses 0 Bill Items
<input type="checkbox"/> M00000261	Commercial Consultation for Maria	Commercial	Carolina Robinson	1-Review	Invoiced	Fixed Fee	0 Time Logs 0 Expenses 0 Bill Items Fixed Fee:5000.00
<input type="checkbox"/> M00000285	Legal Advice for Banking Issue	Banking & finance	James Marvin	2-In Progress	To-Invoice	Hourly Rate	0 Time Logs 0 Expenses 0 Bill Items
<input type="checkbox"/> M00000290	PRONOI	Civil	Carolina Robinson	Closed	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 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%) Tax VAT (11.00%)

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.

The screenshot shows the 'Items' section of the App4Legal interface. The navigation bar at the top includes 'Dashboards', 'Clients', 'Invoices', 'Expenses', 'Time Entries', 'Suppliers', 'Partners', 'Reports', and 'Advanced'. The 'Items' tab is selected. Below the navigation bar, there are four buttons: 'Add Service', 'Import Time Logs', 'Import Expenses', and 'Import Bill Items'. A red box highlights these buttons. To the right of these buttons is a settings gear icon, also highlighted with a red box. Below the buttons, there are three sections: 'Time Logs', 'Expenses', and 'Bill Items'. Each section has a table of data. The 'Time Logs' table has columns: Date, User, Description, Effort, Rate, Discount, Tax, and Amount. It contains three rows of data. The 'Expenses' table has columns: Date, Expense Category, Description, Quantity, Expense Amount, Discount, Tax, and Amount. It contains one row of data. The 'Bill Items' table has columns: Date, Account Name, Description, Quantity, Unit Price, Discount, Tax, and Amount. At the bottom right, there are 'Back' and 'Next' buttons, and a chat bubble icon. A red box highlights the 'Back' and 'Next' buttons.

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.

The screenshot shows the 'Options' menu in the App4Legal interface. The menu is open, showing a list of options: 'Change Discount Level', 'Hide Date', 'Hide Quantity', and 'Hide Tax'. Below these options, there is a 'Go To' section with three items: 'Services', 'Discounts', and 'Taxes'. The menu is styled with a light blue background and a white border.

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

Q 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.

Import Expenses

×

> Expenses Still in Draft Vouchers

1

Expenses Related to Matters

Q Start typing

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)

Expenses

Miscellaneous Expenses

Q Start typing

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.

Dashboards
Clients
Invoices
Expenses
Time Entries
Suppliers
Partners
Reports
Advanced

App4Legal-USD - USD

Client
Matters
Items
Additional Info

Invoice Ref

P.O#

Terms
30 Days
Date
2023-03-08
Due Date
2023-04-07
Reminder
ON
Notify Me Before
5 Day(s)

Status
DRAFT OPEN

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:

Dashboards
Clients
Invoices
Expenses
Time Entries
Suppliers
Partners
Reports
Advanced

App4Legal-USD - USD

General Info
Payment Made
Attachments
Email

INV0000055
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

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 page allows you to see all payments made on the invoice, with the option to print a receipt.



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!