

# How to Track and Manage Supplier Bills Details

## Objectives

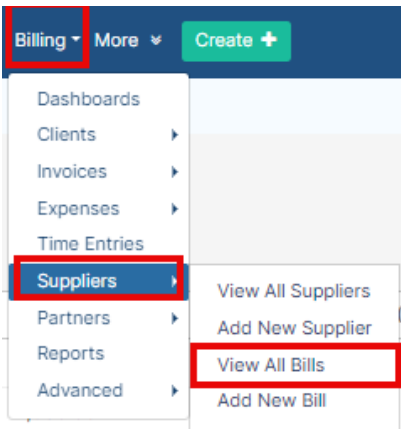
- Track the supplier bills
- Manage Bill Details (Edit/Add Comments/Approve/Record Payments/upload attachments)

## Steps


The Billing module in LEXZUR allows you to handle all financial data, such as expenses, invoices, supplier bills, clients, and time logs.

To track and manage all bills shared by a supplier:

First, from the main menu click **Billing Suppliers View All Bills**.



From this grid, you can view all the bills with their details such as bill date, number, status, related supplier account, and so on.

 You can manage the grid view, add or remove columns, advance your search based on specific bill conditions, and export the results to a spreadsheet for reporting purposes.

Dashboards Clients Invoices Expenses Time Entries Suppliers Partners Reports Advanced													App4Legal-USD - USD
Bills All													Export Tools
1 - 20 of 71 items													Search Advanced Columns
Bill Date	Bill#	Supplier Account	Supplier Account Number	Total (USD)	Payment Made (USD)	Balance Due (USD)	Due Date	Status	Supplier Bill#	Matter ID	Matter Name	Client Name	Note
2023-12-06	BIL-0000107	SA Trading Company - USD	SUP20	2,255.00	0.00	2,255.00	2023-12-06	Overdue		M00000341	Legal Advice for Mar	Maria Smith	
2023-12-06	BIL-0000106	SA Trading Company - USD	SUP20	2,600.00	0.00	2,600.00	2023-12-21	Draft		M00000341	Legal Advice for Mar	Maria Smith	
2023-11-27	BIL-0000105	Brandy Translation - EUR	SUP8	1,070.00	1,000.00	70.00	2023-12-27	Partially Paid					
2023-11-10	BIL-0000104	SSC Software - USD	SUP10	5,550.00	0.00	5,550.00	2023-11-10	Draft					
2023-10-25	BIL-0000103	Common Law - USD	SUP18	300.00	300.00	0.00	2023-10-31	Paid		M00000305	DIG International li		
2023-10-25	BIL-0000102	Common Law - USD	SUP18	200.00	200.00	0.00	2023-10-31	Paid		M00000043	Legal Advice for Adv		
2023-10-24	BIL-0000101	Common Law - USD	SUP18	555.00	555.00	0.00	2023-10-24	Paid					

To Track a specific bill, just click on the bill date. You will be directed to the Bills detailed page where you can manage the General Info, Approval Center, Payments, Attachments, and related Invoices.

## General Info:

General Info
Approval Center
Payment Made
Attachments
Client Invoices

BIL-0000059 - Draft
Supplier \*
SSC Software - USD
Date \*
04/12/2023
Due date \*
04/12/2023
Notify me before
Client's Account
Peter Young - USD
Related Matter
Legal Advice- Peter Young
Supplier Bill#
Tax Number
Approval Status
Awaiting Approval


Preview
Export
Save

Bill Summary
Supplier Bill#
Supplier Name
SSC Software - USD
Date
2023-04-12
Due date
2023-04-12
Bill Reference
0000059
Subtotal (USD)
2,100.00
Total tax (USD)
0.00
Total
2,100.00 USD

Bill Details

Account	Description	Quantity	Price (USD)	Client Details	Tax (%)	Amount (USD)
Accounts						
IT Expenses	IT expenses	1	2,100	Peter Young - USD	Select a Tax	2,100.00
Add New Line						

Under the **General info** tab, you can edit the Bill details, add new Bill items, and add comments as well.

 Bills can no longer be edited once they have been paid, partially paid, or imported into an invoice.

Account	Description	Quantity	Price (USD)	Client Details	Tax (%)	Amount (USD)
Accounts						
Firm expenses	Office Supplies	1	100	Advanced Industries - USD	Select a Tax	100.00

Description

Subtotal
100.00
Total tax
0.00
Total
100.00
Save

Comments

No Comments
Comment

Audit History

 The initial status of the bill could be set from the settings as Draft or Open

Approval Center:

If the Bill details match certain approval criteria, the approval process will start.

However, the status of the bill will be automatically set to open and it will be auto-approved if there are no matching approval criteria.

Approvers will receive an email notification, and they can then approve or reject the bill from the **Approval Center** Tab.



The Bills Approval Center can be configured from the Billing Settings based on predefined business criteria. [Learn more here.](#)

## Payment Made:

The **Payment Made** Tab, is where you can view payments made on the bill and record a new one.



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

DashboardsClientsInvoicesExpensesTime EntriesSuppliersPartnersReportsAdvancedApp4Legal-USD - USD

General InfoApproval CenterPayment MadeAttachmentsClient Invoices

Supplier:Global Tech - USD (14)

Supplier Bill#:

Total (USD)600.00

Payment Made (USD)600.00

Balance Due (USD)0.00

Payment Made

ActionsRecord Payment

Paid On	Payment Method	Amount	Currency	Reference #	Paid Through
2023-04-12	Cash	600.00	USD		BBC Bank Account (125)

## Attachments:

From the **Attachments** Tab, you can Upload Files/Folders, and create a new folder or document related to this bill.

DashboardsClientsInvoicesExpensesTime EntriesSuppliersPartnersReportsAdvancedApp4Legal-USD - USD

General InfoApproval CenterPayment MadeAttachmentsClient Invoices

+ NewUpload

Search 625

625

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By	Modified on
Bill Details.xlsx				13.9 kB	2023-04-12 18:03...	Carolina Robinson	Carolina Robinson	2023-04-12 18:03...
IT infrastructure.docx				36.8 kB	2023-04-12 18:03...	Carolina Robinson	Carolina Robinson	2023-04-12 18:03...

## Client Invoices:

Bills items can now be invoiced, therefore, you can track the related invoices under the **Client Invoices** tab.

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

App4Legal-USD - USD

General Info

Approval Center

Payment Made

Attachments

Client Invoices

Client Invoices

Related Invoice #	Client Account	Invoice Date	Status	Total	Payment Made	Currency
INV0000069	Alvah Scott - USD	2023-04-12	Open	525.00	0	USD

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!