

How to Add Adjustments on Invoices

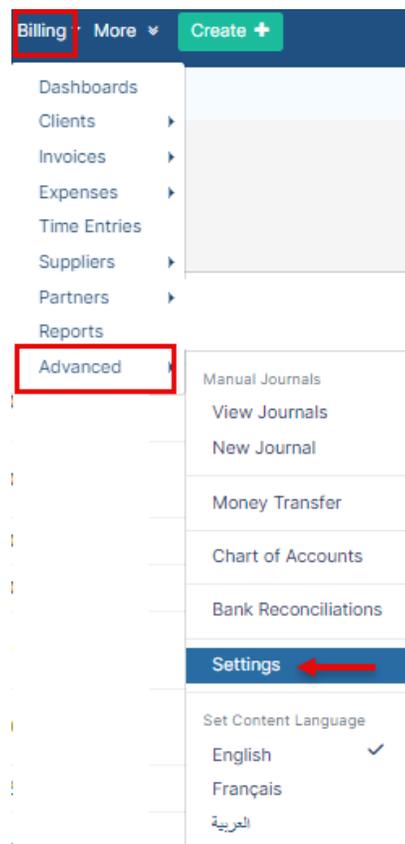
Objectives

- [Enable the Adjustment feature](#)
- [Add Adjustment at the invoices level](#)

Steps

Adjustments are amounts or percentages that could be added to the invoices' total amount.

You must first enable this feature from the Billing Settings, therefore from the main menu click **Billing Advanced Settings**



Within the **Invoices** Section click **Adjustment in Invoices**.

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Entities

- Setup Entities
- Import Entity Settings

Expenses

- Expense Categories
- Petty Cash to User Mapping

Partners

- Activate Partners Commissions Tools
- Partner Expenses Account
- Partner Statement Templates

Invoices

- Taxes
- Discounts
- Terms
- Services
- Invoice Templates
- Invoice Notes
- Invoice Details Format
- Discount in Invoices
- Adjustment in Invoices
- Credit Note Reasons
- Debit Note Reasons
- Invoice Custom Fields
- Email Templates

Money

- Setup & Configuration
- Users Rate per Hour
- Default Exchange Rate
- Time Entries Exchange Account
- Advisor Time Entries Expense Account
- Invoice Number Prefix
- Credit Note Number Prefix
- Debit Note Number Prefix
- Set Prefix for Account Types
- Trust Account
- Analytic Account
- Analytic Account Template

Bills

- Taxes
- Bills Templates
- Bills Approval Center

Manage Boards

- Money Dashboard

Adjustments could be enabled at the invoice level **Before Tax** or **After Tax**. Also, could be enabled to **services and time logs after tax** or **apply to services and time logs before tax**.

And it should be linked to an **Income Account**.

✔ [Learn more about how to create accounts here.](#)

Adjustment in Invoices ✕

Enabled

Invoice Level (After Tax)
▼

No

Invoice Level (After Tax)

Invoice Level (Before Tax)

Apply to Services and Timelogs (After Tax)

Apply to Services and Timelogs (Before Tax)

Save
Cancel

You can now use this feature while creating the invoice.

When editing your invoice, you can access the action wheel located on the right side. From there, select "Change Adjustment Level." Then, choose the desired adjustment level for the invoice you are currently working on.

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Client Matters Items Additional Info

Add Service Import Time Logs Import Expenses Import Bill Items

Time Logs

Date	User	Description	Effort	Rate	Tax	Amount
2024-02-13	James Marven	A104: Review/Analyze	1.5	200	0%	300 USD

Expenses

Date	Expense Category	Description	Quantity	Expense Amount	Tax	Amount
2024-02-13	Copying	2024-02-13	1	1,000	0%	1000 USD

Total Discount (At Invoice Level Before Tax) 10.0%

Adjustment 0.0% Percentage

Sub Total USD 1,300.00

Discount Amount USD 130.00

Sub Total After Discount USD 1,170.00

Cancel Back Next Save

- Options
- Change Discount Level
 - Change Adjustment Level
 - Hide Service Date
 - Hide Quantity
 - Hide Tax
 - Go To
 - Services
 - Discounts
 - Taxes

Change Adjustment Level

At Invoice Level After Tax

No Adjustment

At Invoice Level After Tax

At Invoice Level Before Tax

Apply to Services and Timelogs After Tax

Apply to Services and Timelogs Before Tax

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Client Matters Items Additional Info

Add Service Import Time Logs Import Expenses Import Bill Items

Time Logs

Date	User	Description	Effort	Rate	Tax	Amount
2023-12-05	Carolina Robinson	Meeting	2	300	0%	600 USD

Expenses

Date	Expense Category	Description	Quantity	Expense Amount	Tax	Amount
2023-12-01	Internet & Telephone	2023-12-01	1	500	0%	500 USD

Total Discount (At Invoice Level Before Tax) 0.0% Percentage

Adjustment 5.0% Percentage

Sub Total USD 1,100.00

Discount Amount USD 0.00

Sub Total After Discount USD 1,100.00

Adjustment Amount USD 55.00

Tax USD 0.00

Back Next

At the **Items** level, add the percentage or the amount of adjustment needed.



Learn more about how to Invoice your clients [here](#).

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

Thank you!