

How to Add Adjustments on Invoices

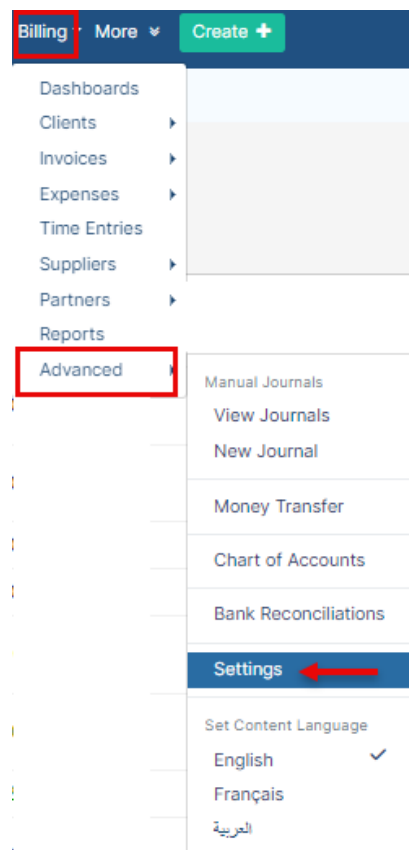
Objectives

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

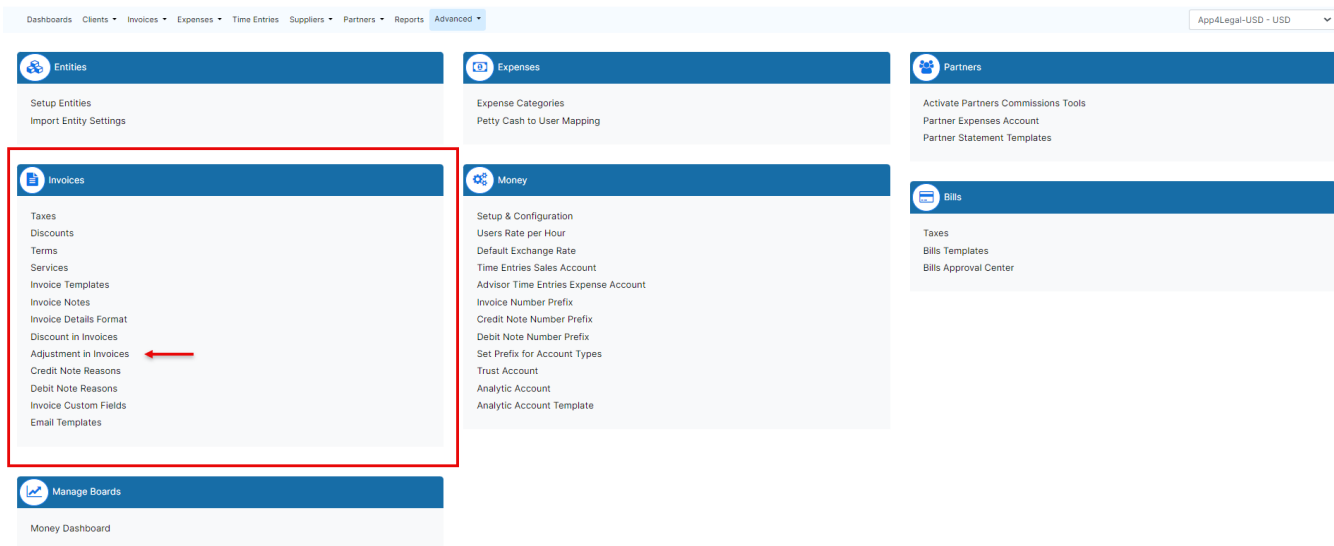
Steps

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**.



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.

Dashboard

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App4Legal-USD - USD

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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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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

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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!