How to Set Invoice Number Prefix

Objectives

- Set Invoice Prefix Number
- Secondary Invoice Prefix

Steps

The Billing Module in LEXZUR allows you to set your Invoice number prefixes for the organization and categorization of the billing processes.

To add an Invoice Prefix, open the Billing Settings, then choose Invoice Number Prefix from the Money section:

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

Here you can include a unique alphanumeric prefix before the sequential invoice number.

Dashboards	Clients 👻	Invoices -	Expenses •	Time Entries	Suppliers 🝷	Partners 🝷	Reports	Advanced 👻	
			Settir	ngs / Invoice N	lumber Prefix				
			Invoi	ce Numb	er Prefix				
				voice Number P NV	Prefix				
			_	Enable Invoice voice Number S		· ·			
			1	NT					
				Save					

Additionally, LEXZUR offers the functionality of a Secondary Invoice Prefix. This feature allows users to further customize invoice numbering based on specific criteria, such as client type, location, or any other preferred identifier. By enabling the Secondary Invoice Prefix, you can create distinct invoice numbers for different categories of clients or regions.

Settings / Invoice Number Prefix
Invoice Number Prefix
Invoice Number Prefix
INV
Enable Invoice Number Secondary Prefix
Invoice Number Secondary Prefix
INT
Save

The system will then allow you to easily select the desired invoice prefix type when creating an invoice.

lient	Matters	
Client Account		
Start typing		
Invoice Templates		
Choose a template		\sim
Prefix Type		
Invoice Number Prefix		\sim
Invoice Number Prefix		
Invoice Number Secondary Prefix		

The invoice prefix will be visible on the invoice number once it is generated.

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Invo	ices All	•	Save as							₽• Export 👻	🌣 Tools 👻
1 - 2 of :	2 items 🖒									Advanced	Columns 👻
	Invoice#	Client's Account	Client Account Number	Total	Payment Made	Balance Due	Currency	Status	Approval Stat	Invoice Date	Due On
	INV-230000002	BLP industry - USD	1	2,050.00 USD	0.00	2,050.00	USD	overdue	approved	2023-07-13	2023-07-13
	INV-230000001	BLP industry - USD	1	500.00 USD	0.00	500.00	USD	overdue	approved	2023-07-13	2023-07-13

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

Thank you!