

How to Create Invoice Custom Fields

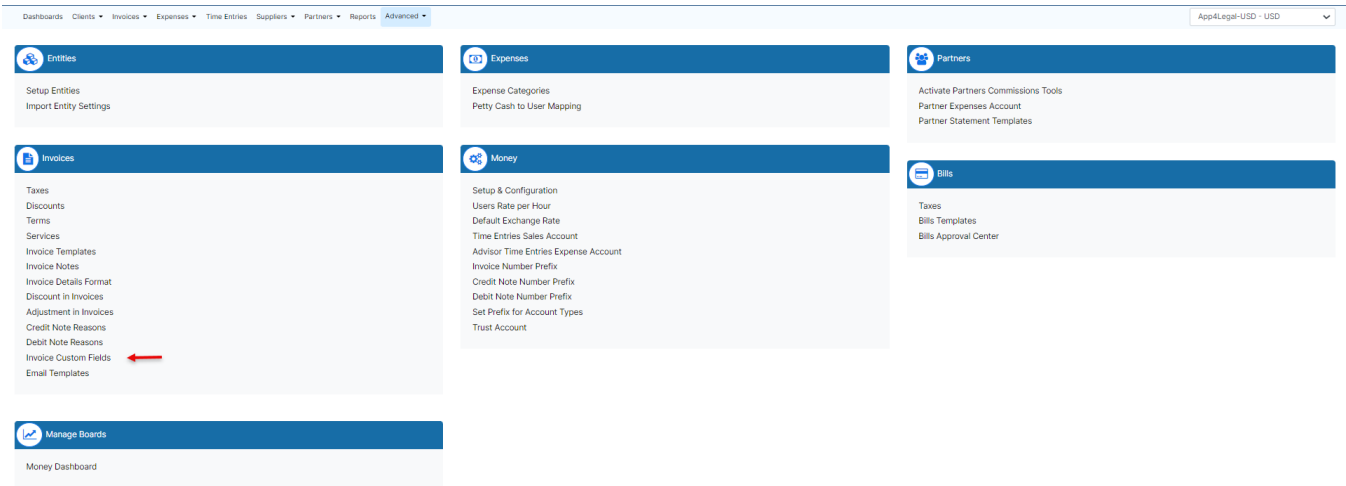
Objectives

- Add Invoice Custom Fields

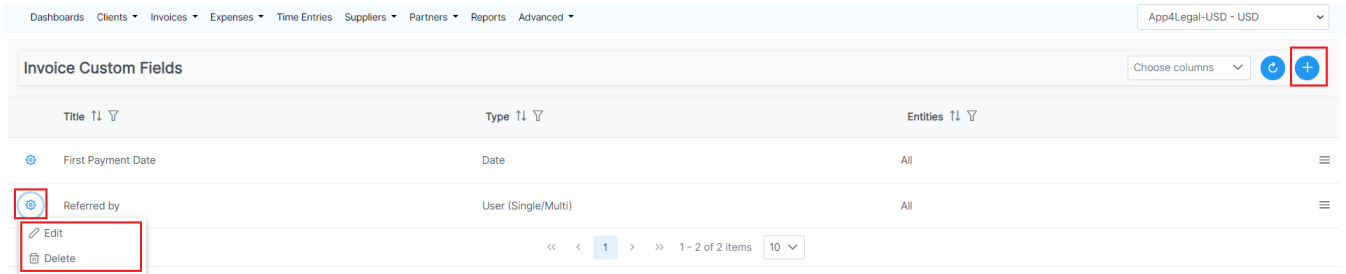
Steps

Users can now have the ability to customize the fields in invoices to suit their preferences. To get started with customizing the fields, follow these simple steps:

- Navigate to the **Billing Advanced Settings**
- Under the Invoices Settings, choose **Invoice Custom Fields**



- Here you can add new fields, edit or remove existing ones and rearrange the field's positions.



- To add a new field, specify its **type**, and give it a **title** in the default language (you can name it in multiple languages as well), and choose whether this field will be added in a specific entity or all entities.

Invoice Custom Fields

Entities

All ☒

Type

Date

Title (English)

First Payment Date

[Show More](#)

Cancel

Save and create another

Save

Invoice Custom Fields

Entities

All ☒

Type

Single Text

Single Text

Text Box

Date

Date & Time

List

Company (Single/Multi)

Person (Single/Multi)

and create another

Save

After customizing the fields, you can easily fill them out while creating the invoice. On the "Additional Info" page, the custom fields will be available for input.

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

App4Legal-USD - USD

Client

Matters

Items

Additional Info

Invoice Ref

Invoice Ref

Status

DRAFT

OPEN

Description

Description

P.O.#

P.O.#

Terms

In Advance

Date

2023-07-20

Due Date

2023-07-20

Reminder

OFF

Notify Me Before

Day(s)

Don't Send an Email

Notes

select an option

Custom Fields

First Payment Date

YYYY-MM-DD

Referred by

Start typing

Back

Save

Once the invoice is generated, these custom fields will also be visible and accessible under the "General Info" section.

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

App4Legal-USD - USD

General Info

Payment Made

Attachments

Email

INV0000095

Advanced Industries - USD

Advanced Industries NewYork, United States

Date

2023-07-20

Due On

2023-07-20

Reference Number

(No Data)

Terms

In Advance

P.O#

(No Data)

Description

(No Data)

Custom Fields

First Payment Date

2023-07-20

Referred by

James Marven

Summary

Sub Total

USD 500.00

Total Discount

USD 0.00

Adjustment

USD 0.00

Sub Total After Discount

USD 500.00

Total Tax

USD 0.00

Total

USD 500.00

Invoice Template

app4legal template

Invoice Status

Open

Approval Status

Approved

Customize Template

INVOICE

App4Legal

Practice with Innovation

Bill To:

Advanced Industries

NewYork, United States

Tax Number: N/A1022

Due On:

2023-07-20

Terms:

In Advance

Exchange Rate:

1 USD = 1 USD

Summary

Sub Total

USD 500.00

Total Discount

USD 0.00

Adjustment

USD 0.00

Sub Total After Discount

USD 500.00

Total Tax

USD 0.00

Total (USD)

USD 500.00

Five Hundred (USD) Only

www.app4legal.com

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

Thank you!