

How to Apply Partner Commissions on Invoices

Objectives:

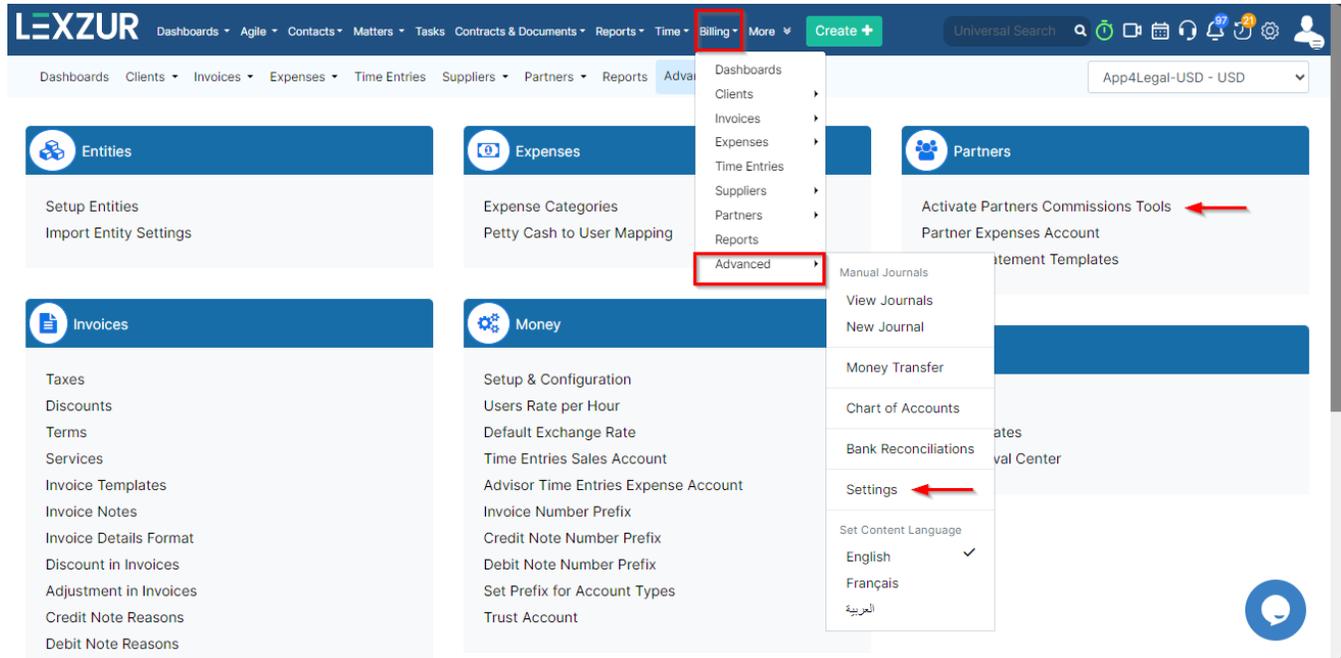
- Activate the Partners' commission tool
- Add partners' shares on invoices
- Add Default partner shares

Steps:

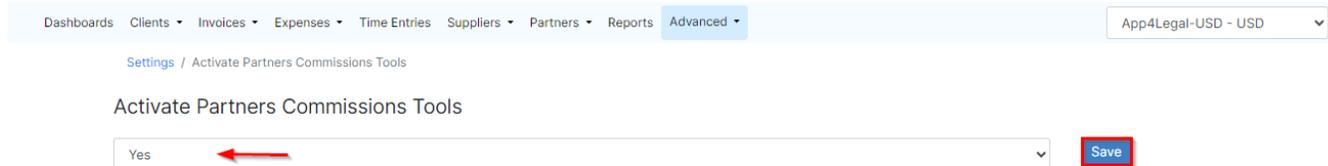
In Lexzur, you have the option to add the partners' commission on invoices.

First, you have to activate this tool.

- Go to **Billing Advanced Settings Activate Partners Commissions Tools** under the Partners Settings.



- Activate the partner's commissions tools by changing the status to **Yes**.



- Now, at the level of invoices, after adding all the billable items, a new icon will appear at each item level which is related to the partner's shares.

The screenshot shows a software interface for managing invoices. At the top, there is a navigation bar with tabs for 'Dashboards', 'Clients', 'Invoices', 'Expenses', 'Time Entries', 'Suppliers', 'Partners', 'Reports', and 'Advanced'. A dropdown menu on the right shows 'confident case UK - EUR'. Below the navigation bar, there are four main sections: 'Client', 'Matters', 'Items', and 'Additional Info'. The 'Items' section is active, showing a table of services and time logs. The 'Services' table has columns for Date, Service Name, Description, Quantity, Unit Price, Discount, Tax, and Amount. The first row is for 'Consultancy' on 2024-02-11 with a quantity of 1 and a unit price of 500, totaling 500 EUR. A red box highlights a blue icon with a person symbol next to this row. The 'Time Logs' table has columns for Date, User, Description, Effort, Rate, Discount, Tax, and Amount. It shows two entries for 'Carolina Robinson' with a total amount of 200 EUR. Red boxes highlight the blue icons with person symbols next to both time log entries. At the bottom right, there are 'Back' and 'Next' buttons and a chat icon.

- Click to add partner shares at the level of an item as needed. A new page will pop up, where you have to add the partners and the percentages for each partner.

The 'Add Partners Shares' dialog box is shown. It has a title bar with a close button. Below the title, there is a search icon and the text 'Partners Shares'. A red box highlights a blue button with a plus sign and the text '+ Add New Line'. Below this is a table with three columns: 'Partner', 'Percentage', and 'Amount'. The first row has 'LLP Services' in the Partner column, '22.0%' in the Percentage column, and '110.00 EUR' in the Amount column. The second row has 'abc' in the Partner column, '12.0%' in the Percentage column, and '60.00 EUR' in the Amount column. Red arrows point to the input fields for the Partner, Percentage, and Amount columns. At the bottom right, there are 'Cancel' and 'OK' buttons.

 You can add more partners from the "Add New Line" button

- Once the partner's shares are added to the line items, the icon's color will change to green.

[Dashboards](#) [Clients](#) [Invoices](#) [Expenses](#) [Time Entries](#) [Suppliers](#) [Partners](#) [Reports](#) [Advanced](#) confident case UK - EUR

[Client](#) [Matters](#) [Items](#) [Additional Info](#)

[Add Service](#) [Import Time Logs](#) [Import Expenses](#) [Import Bill Items](#)

Services

Date	Service Name	Description	Quantity	Unit Price	Discount	Tax	Amount
2024-02-11	Consultancy		1	500	0%	0%	500 EUR

Time Logs

Date	User	Description	Effort	Rate	Discount	Tax	Amount
2023-10-17	Carolina Robinson	2023-10-17 - 1.50	1.5	100	0%	0%	150 EUR
2023-10-23	Carolina Robinson	2023-10-23 14:23 - 2023-10-23 14:24	0.5	100	0%	0%	50 EUR

Sub Total EUR 700.00

[Back](#) [Next](#)

You have the flexibility to define a default partner share either at the level of the clients themselves or on a per-matter basis.

To do so, navigate to the client's page, (From the main menu: **Contacts Clients Click on the Client ID**) access the **Partners Shares** tab, and add the shares based on each partner.

LEXZUR [Dashboards](#) [Agile](#) [Contacts](#) [Matters](#) [Tasks](#) [Contracts & Documents](#) [Reports](#) [Time](#) [Billing](#) [More](#) [Create +](#)

MS PER0000127 Maria Smith
 Client

[General Info](#)
[Attachments](#)
[Persons](#)
[Matters](#)
[Contracts & Documents](#)
[Reminders](#)
[Expenses](#)
[Time Entries](#)
[Supplier Bills](#)
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[Trust Fund Deposits](#)
[Partner Shares](#)

Add Partner Shares

Partner	Percentage
Common Law - AED	10

[Save](#)

Additionally, within the matter **settings** page, you'll find a dedicated **Partners Percentage** tab where you can specify shares at the matter level.

The screenshot displays the Lexzur software interface. At the top, a navigation bar includes 'Dashboards', 'Agile', 'Contacts', 'Matters', 'Tasks', 'Contracts & Documents', 'Reports', 'Time', 'Billing', 'More', and a 'Create +' button. Below this, the main header shows 'M00000285 Legal Advice for Banking Issue' and 'Matter - Corporate Matter'. A sidebar on the left lists various menu items: 'General Info', 'Tasks', 'Reminders', 'Emails', 'Bills', 'Attachments', 'Expenses', 'Time Entries', 'Invoices', 'Matters', 'Contracts & Documents', 'Settings', and 'Financial'. The 'Settings' item is highlighted with a red box. The main content area shows a summary of financial metrics: 'Trust' (14,400.00 USD), 'Paid' (0.00 USD), 'Due' (1,400.00 USD), and 'Billable' (0.00 USD). Below these metrics, there are tabs for 'User Rate Per Hour', 'Matter Rate', 'Capping', 'Partners Percentage', and 'Billing Preferences'. The 'Partners Percentage' tab is selected and highlighted with a red box. Under this tab, there is a table with columns for 'Partner' and 'Percentage'. The first row shows 'Common Law - AED' with a percentage of '25'. A red arrow points to a red 'X' icon next to the '25' value. A '+ Add partner share' button is located above the table. A 'Save' button is positioned below the table.

In this scenario, once a matter is invoiced, the partner share will be automatically applied to all items imported from that matter. Of course, you also have the option to modify and add different shares for various invoice items as needed.

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

Thank you!