

# How to Add a New Bill

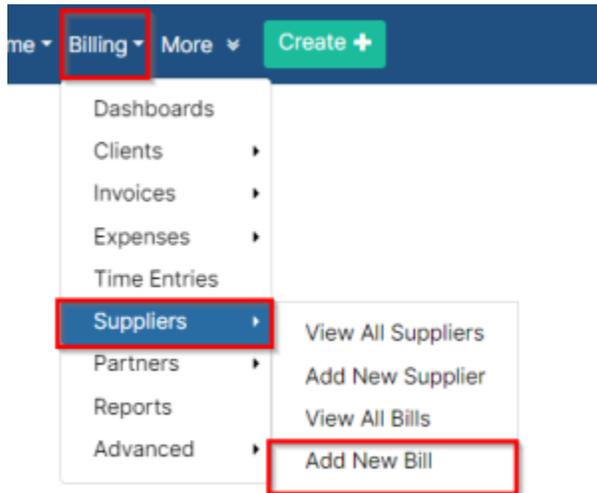
## Objectives

- Add Supplier Bills

## Steps

To add a new Bill:

Click on **Billing Suppliers Add New Bill** from the main menu



Fill out the necessary fields:

A screenshot of the 'Add New Bill' form in a web application. The form is titled 'BIL-00056 - Draft' and has a 'Save' button. It contains several input fields: 'Supplier' (Global Tech - USD), 'Date' (04/12/2023), 'Due date' (05/31/2023), 'Client's Account' (Alvah Scott - USD), and 'Related Matter' (Legal Advice For Alvah Scott). There are also fields for 'Supplier Bill#' and 'Tax Number'. A 'Bill Summary' table is displayed on the right side of the form. Below the form is a 'Bill Details' table with columns for Account, Description, Quantity, Price (USD), Client Details, Tax (%), and Amount (USD).

Supplier Bill#	
Supplier Name	Global Tech - USD
Date	2023-04-12
Due date	2023-05-31
Bill Reference	00056
Subtotal (USD)	0.00
Total tax (USD)	0.00
<b>Total</b>	<b>0.00 USD</b>

Account	Description	Quantity	Price (USD)	Client Details	Tax (%)	Amount (USD)
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**Supplier:** Supplier Account concerned with the Bill

**Date and Due Date** of the bill (you can set a reminder directly to remind you prior to the due date)

**Client's Account:** Specify the Client related to the created bill.

**Related Matter:** You can relate this bill to a matter. Simply specify the matter ID or name.

**Supplier Bill#**

**Tax Number** of the Supplier. It will be automatically retrieved from the Company/Person details page.



The Tax number used in the Billing Module can be predefined for clients or suppliers from the Contacts (Company or Person) Details Page. [Learn more here.](#)



The initial status of the bill could be set from the settings as Draft or Open.

Under the Bills Details section add the bill items:

Specify the Account to be used in the bill (Assets, Liability, or Expense accounts), Description of the items, Quantity, Price, and Tax if needed.

You can also relate the items to a client under the Client Details field.

The screenshot shows the 'Bill Details' form. At the top, there's a table with columns: Account, Description, Quantity, Price (€), Client Details, Tax (%), and Amount (€). Below the table, there's a 'Description' field and an 'Attachments' section with a 'Choose File' button highlighted in a red box. On the right side, there's a summary box showing Subtotal (0.00), Total tax (0.00), and Total (0.00) with a 'Save' button.

Bills Items could be invoiced later on. Therefore, you can specify for each item if it's billable or not, relate it to a matter, and add a markup rate as well.

The screenshot shows the 'Bill Details' form with a dropdown menu open for the 'Client Details' field. The menu options are: 'Alvah Scott - USD', 'Billable' (checked), 'Related Matter' (with a search field containing 'Legal Advice For Alvah Scott'), and 'Markup Rate' (set to 5%). The 'Update' button is highlighted in a red box.



Once saved, the bill status will be automatically set to open and it will be auto-approved if there are no matching approval criteria. Otherwise, it will be kept as a draft, and awaiting approval.

General Info

Approval Center

Payment Made

Attachments

Client Invoices

BIL-0000059 -

Draft

Supplier \*

SSC Software - USD

Supplier Bill#

Date \*

04/12/2023

Due date \*

04/12/2023

Notify me before

Tax Number

Client's Account

Peter Young - USD

Approval Status

Awaiting Approval

Related Matter

Legal Advice- Peter Young

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!