

How to Add a New Bill

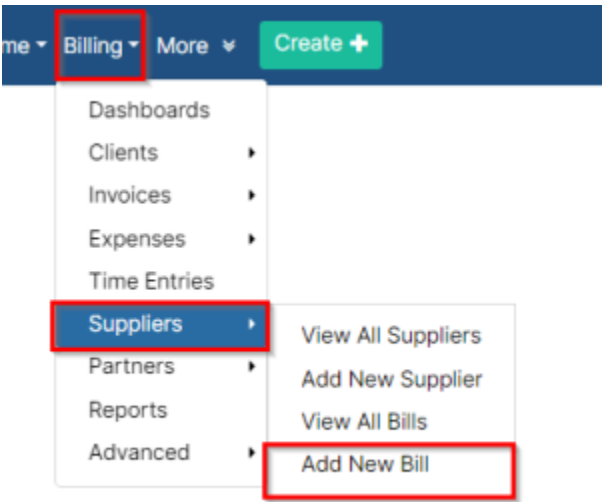
Objectives

- 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:

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

App4Legal-USD - USD

Save

BIL-00056 - Draft ?

Supplier *

Global Tech - USD

Date *

04/12/2023

Due date *

05/31/2023

Client's Account

Alvah Scott - USD

Related Matter

Legal Advice For Alvah Scott

Supplier Bill#

Tax Number

Bill Summary

Supplier Bill#

Supplier Name

Date

Due date

Bill Reference

Subtotal (USD)

Total tax (USD)

Total

Global Tech - USD

2023-04-12

2023-05-31

00056

0.00

0.00

0.00 USD

Bill Details

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.

Bill Details

Account *	Description	Quantity	Price (?)	Client Details	Tax (%)	Amount (?)
Select an Account		1	0	Start typing	Select a Tax	0.00
Add New Line						

Description

Attachments

Choose File No file chosen

Subtotal 0.00
Total tax 0.00
Total 0.00

Save

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.

Bill Details

Account	Description	Quantity	Price (USD)	Client Details	Tax (%)	Amount (USD)
Office Supplies	Technical Supplies	1	500	Alvah Scott - USD	Select a Tax	500.00
Internet & Telephone	Internet expenses	1	100	Legal Advice For Alvah Scott	Select a Tax	100.00
Add New Line						

Description

Alvah Scott - USD

Billable

Related Matter

Legal Advice For Alvah Scott

Markup Rate

5

Cancel Update



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.

Dashboards

Clients ▾

Invoices ▾

Expenses ▾

Time Entries

Suppliers ▾

Partners ▾

Reports

Advanced ▾

General Info

Approval Center

Payment Made

Attachments

Client Invoices

BIL-0000059 -

Draft

Supplier *

SSC Software - USD

Date *

04/12/2023

Due date *

04/12/2023

Notify me before

Client's Account

Peter Young - USD

Related Matter

Legal Advice- Peter Young

Supplier Bill#

Tax Number

Approval Status

Awaiting Approval

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

Thank you!