How to invoice time logs/entries?

Objectives

- Invoice Time
- Invoice your client

Steps

In LEXZUR you can invoice time entries. You can do this by going to Billing Invoices Add Invoice.

	nboards - Agile - Contacts -	Matters - Tasks Contracts & I	Documents - Reports - Ti	ime -	Billing - More 🖲	•	Create +	Universal Sea	rch 🔍 Ō (⊐ 🗇 🖞	7 🕫 🚑
Dashboards Clients -	Invoices • Expenses • Time	e Entries Suppliers 👻 Partners 🔻	Reports Advanced -		Dashboards Clients				app4I	egal - USD	~
Invoices All 1 - 20 of 26 items C			Invoices Expenses Time Entries Suppliers	•	View All Invoices Add Invoice			Export Tools Advanced Columns			
Invoice#	Client's Account	Client Account Number	Total	C		•	Add New Quote View All Credit Notes	Currency	Status	Approval Stat.	Invoice Date
INV-0000026	BTL Insurance - USD	53	3,700.00 USD	3,	Reports Advanced	•	0.00	USD	paid	approved	2023-02-20
INV-000025	John Marven - USD	51	555.00 USD	0.	00		555.00	USD	draft	approved	2023-02-01
INV-0000024	bLP industry - USD	68	600.00 USD	0.	00		600.00	USD	overdue	approved	2023-01-10
INV-0000023	bLP industry - USD	68	450.00 USD	0.	.00		450.00	USD	draft	approved	2022-11-10
INV-0000022	BTL Insurance - USD	53	4,500.00 USD	1,	500.00		3,000.00	USD	overdue	approved	2022-09-23
INV-0000021	LNP - USD	71	2,200.00 USD	2,	200.00		0.00	USD	paid	approved	2022-08-03
INV-0000020	Modern Structure - USD	6	300.00 USD	0.	00		300.00	USD	overdue	approved	2022-08-03
INV-0000019	Modern Structure - USD	6	1,305.00 USD	1,	305.00		0.00	USD	paid	approved	2022-08-10

You will be redirected to the Add New Invoice page, where you need to go through some steps.

Client:

The first step is Client related. Therefore, specify the Client's Account, and choose the invoice template from the predefined list of templates (you can click on **Customize Template** to add a new template if needed).

An invoice number is a sequential number. It can default to start from a certain Value. The invoice # keeps on incrementing.

The client's details such as the address, Tax number, bill to address, and so on, are all fields retrieved automatically from the contact's page, and you can edit them on the fly.

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• Matters:

The next step is to link matters along with their corresponding time logs, expenses, and bills to the invoice.

Under the Matters Page, you will find all the matters (corporate matters, litigation cases, and matter containers) related to the selected client, where you can select the matters that you want to link to your invoice.

You can easily filter the type of matters you want to show on this page.

Additionally, you can search by the Matter Name, Practice Area, Assignee, and Status.

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The system will show you the time logs related to the selected Matters, here you have the list where you can select the Time Log you want to invoice.

Moreover, you have the choice to set a discount or Tax.

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Once you click on Finish, the time logs will be listed under the Invoice Details.

Dashboards Clients	Invoices Expenses Time Entries Suppliers Partners Reports Advanced								~	
	Client	Matt			Items		Additional Info	Additional Info		
≅ Add Service	() Import Time Logs ()	Import Expenses	3 Import Bill Items 🧿						٥	
~				③ Time Logs						
Date	User	Description	Effort	Rate	Discount	Тах	Amount			
2023-10-06	Carolina Robinson	2023-10-06 - 0.10	0.1	300	0%	0%	30 USD	<u>e</u>		
2023-10-06	Carolina Robinson	2023-10-06 - 2.00	2	300	0%	0%	600 USD	<u>e</u>		
2023-10-06	Carolina Robinson	2023-10-06 - 0.10	0.1	300	0%	0%	30 USD	<u>e</u>		
2023-10-07	Carolina Robinson	2023-10-07 - 1.50	1.5	300	0%	0%	450 USD	<u>e</u>		

Last but not least, the additional info page is where you must specify some additional invoice details, such as the P.O#, Terms, Date, and Due Date.

A system reminder can also be set up to notify you before a specific deadline for the invoice.

Furthermore, you can include payment details and bank account details or any specific details on your invoices via predefined notes.

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

Thank you!