

How to E-invoice your clients

Objectives

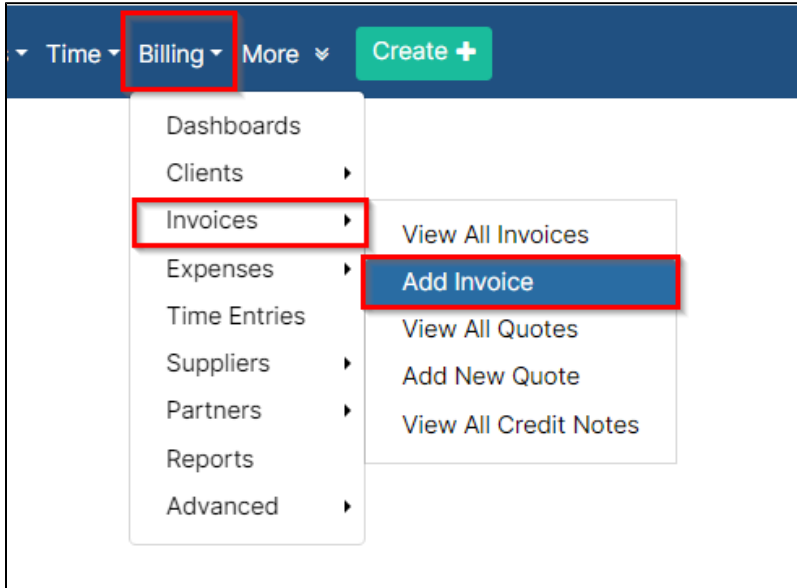
- Create E-Invoice

Steps



You should enable E-invoicing at the entity level you are using before creating an invoice.

To create an E-invoice, Go to the **Billing Invoices Add Invoice**



You must follow some steps.

First, the Client's Details: Specify the Client's Account, and choose the invoice template from the predefined list of templates.



Once the invoice is saved as open, the system will provide the invoice number automatically

Import Expenses

Expenses Related to Matters

☐ Paid On
 Category
 Amount
 Tax
 Total Amount
 Paid Through
 Billing Status
 Matter
 Comments

☒ 2023-04-05 Judgment Fee 500 USD (No Tax) 500 USD Supplies to-invoice Legal opinion for service agreement for BLP (No Data)

☐ 2023-04-05 Fines 500 SAR (No Tax) 500 SAR Office to-invoice Legal opinion for Service Agreement for BLP (No Data)

Miscellaneous Expenses

☒ Paid On
 Category
 Amount
 Tax
 Total Amount
 Paid Through
 Billing Status
 Comments

☒ 2023-03-08 Fines 3,000 SAR (No Tax) 3,000 SAR Office to-invoice (No Data)

2 items selected

Cancel

Submit and Continue

Additionally, you can import expenses that are not related to matters, so all client-related expenses can now be invoiced.

The import Expenses window will allow you to select from expenses related to matters or miscellaneous expenses.

In the third step, you will view or edit all imported time logs, expenses, and bill items or you can add additional services.

Client

Matters

Items

Additional Info

Add Service

Import Time Logs

Import Expenses

Import Bill Items

Time Logs

Expenses

Bill Items

Date

User

Description

Effort

Rate

Tax

Amount

2023-04-05

Carolina Robinson

Hearing

1

5,000

0%

5,000 SAR

Date

Expense Category

Description

Quantity

Expense Amount

Tax

Amount

2023-04-05

Judgment Fee

2023-04-05

1

500

0%

500 SAR

2023-03-08

Fines

2023-03-08

1

3,000

0%

3,000 SAR

Date

Account Name

Description

Quantity

Unit Price

Tax

Amount

2023-04-05

Office Supplies

Stationary supplies

1

100

0%

100 SAR

Back

Next

Moreover, the action wheel on the top right, allows you to do further modifications such as changing the discount level, therefore, you can perform discounts on the level of each item in the invoice, on the level of the invoice total amount before tax, and on the level of the invoice total amount after-tax. This advanced option will allow more flexibility when invoicing your clients.

To add a new service you can simply choose from a list of predefined services and you can add a new one on the fly.

Add Service

Services

Start typing

New Service

Service Name	Description	Unit Price	Tax
<input type="checkbox"/> Annual Legal Mgt.	(No Data)	6,000 SAR	(No Tax)
<input type="checkbox"/> Office Expenses	Average monthly expenses	5,000 SAR	(No Tax)
<input type="checkbox"/> Consultancy	Legal Consultation	5,000 SAR	(No Tax)
<input type="checkbox"/> consultation	Legal Consultation	5,000 SAR	(No Tax)
<input type="checkbox"/> Incorporation	(No Data)	2,000 SAR	(No Tax)
<input type="checkbox"/> Legal Docs	(No Data)	3,000 SAR	(No Tax)
<input type="checkbox"/> Stamps	(No Data)	1,000 SAR	(No Tax)
<input checked="" type="checkbox"/> Translation	Legal Docs Translation	1,000 SAR	(No Tax)

1 items selected

Cancel

OK

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.

Client

Matters

Items

Additional Info

Invoice Ref

Invoice Ref

Status

DRAFT

OPEN

P.O#

P.O#

Terms

30 Days

Date

2023-03-08

Due Date

2023-04-07

Reminder

ON

Notify Me Before

5

Day(s)

Also Send an Email

Description

Description

Notes

Bank Details

For the settlement of the invoice please use the below medium:

1- Wire transfer or Local Deposit:

Bank name: Bank ABC

Account name: 555256256

IBAN: US-23265235

Swift Code: 1334

E-Invoicing Required Fields

Invoice Type

Tax Invoice

Transaction Type

Nominal

Payment Method

Credit transfer

Back

Save

The remaining fields, such as invoice type, transaction type, and payment method, are E-invoicing Required Fields and must be filled out as well:

- Invoice Type:** It can be Tax Invoice, Simplified Tax invoice or Both
 - Tax Invoice:** A normal tax invoice as per KSA VAT regulation. Taxable Supplies subject to the standard rate valued at SAR 1,000 or more, made to a Taxable Person or non-taxable Legal Person. Taxable Supplies made to a non-taxable natural person (other than exports of goods).
 - Simplified Tax Invoice:** A simplified Tax Invoice may be issued for a Supply of Goods or services. A simplified tax invoice contains a lower number of fields as per KSA VAT regulation. Mainly B2C (business to consumer). Export of goods

Invoice Type

Tax Invoice X v

Tax Invoice

Simplified Tax Invoice

- **Transaction Type:** Can be Nominal, Export, Summary or others

1. **Nominal:** The invoice is issued for goods that are provided without consideration as per KSA VAT regulation.
2. **Export:** The invoice is issued to a foreign buyer as per KSA VAT regulation.
3. **Summary:** The invoice is issued for sales occurring over a period of time and occurs for some types of invoicing arrangements between seller and buyer.
4. **Others**

Transaction Type

select an option v

Nominal

Export

Summary

Others

- **Payment Method:** Can be Cash, Credit Transfer, Payment to a bank account, Bank card or Instrument not defined

1. **In Cash:** Payment by currency (including bills and coins) in circulation, including checking account deposits.
2. **Credit Transfer:** Payment by credit movement of funds from one account to another.
3. **Payment to bank account:** Payment by an arrangement for settling debts that is operated by the Post Office.
4. **Bank Card:** Payment by means of a card issued by a bank or other financial institution.
5. **Instrument not defined:** Not defined legally enforceable agreement between two or more parties (expressing a contractual right or a right to the payment of Billing).

Payment Method

Select Payment Method v

Select Payment Method

In Cash

Credit transfer

Payment to bank account

Bank Card

Instrument not defined

The invoice default status will be set as a draft. In other words, the system will not allocate an automatic number, unless you activate the invoice from the top right button, changing created the invoice status to open. When you choose open, the system will give this invoice an automatic unique identifier number.

Once the invoice is created, some restrictions will be applied, such as this invoice cannot be altered or deleted.

General Info

Payment Made

Attachments

Email

INV0000023

BLP Industry - SAR

BLP Industry 123 12345, 1234, Riyadh, Saudi Arabia... Show More

OPEN

Date

2023-03-08

Due On

2023-04-07

Reference Number

(No Data)

Terms

30 Days

P.O#

(No Data)

Description

(No Data)

Invoice Type

Tax Invoice

Transaction Type

Nominal

Payment Method

Credit transfer

> Matters Linked

Summary

Sub Total

SAR 8,600.00

Total Tax

SAR 0.00

Total

SAR 8,600.00

Invoice Template

Zatca invoice

Invoice Status

Open

Approval Status


Approved

THE CURRY LAW FIRM

Real Lawyers, Real Results

فاتورة ضريبية


TAX INVOICE



Invoice #	INV0000023	مراجع الفاتورة
Date	2023-03-08	التاريخ
Due On	2023-04-07	تاريخ الاستحقاق
Exchange Rate	1 SAR = 1 SAR	سعر الصرف
Matter Name	Legal opinion for service agreement for BLP - Acquire the company of BLP	عنوان المسألة

Seller	Buyer	العميل
Name	My instance-E-invoice	الاسم
		BLP Industry
		الاسم

You can now preview your invoice using selected templates, view its details, send emails, print, and export it to Word or to PDF based on the predefined templates, from the list of actions on the **General Info** page.

 You can customize your own E-Invoice Templates to be used in previewing or exporting invoices. Learn more [here](#).

Once this invoice is exported, you will find all the required information and the QR Code. You can, therefore, send it to your client.

Whenever you receive payments, you can easily record them. The Payment Made page allows you to see all payments made on the invoice, with the option to print a receipt.

 Learn more about how to settle payments on invoices in this [guide](#).

You can also send Invoices automatically from the system by using an embedded **Email Engine** and track all the related email conversations.

 Learn more about how to send invoices by email in this [guide](#).

General Info
Payment Made
Attachments
Email

INV0000023
PARTIALLY PAID

BLP industry - SAR
BLP industry 123 12345, 1234, Riyadh, Saudi Arabia... [Show More](#)

Date	2023-03-08
Due On	2023-04-07
Reference Number	(No Data)
Terms	30 Days
P.O#	(No Data)
Description	(No Data)
Invoice Type	Tax Invoice
Transaction Type	Nominal
Payment Method	Credit transfer

[Matters Linked](#)

Summary
Sub Total SAR 8,600.00
Total Tax SAR 0.00
Total SAR 8,600.00

Invoice Template: Zatca invoice
Invoice Status: Partially paid
Approval Status: Approved

فانورة ضريبية
TAX INVOICE

Invoice #	INV0000023	مرجع الفانورة
Date	2023-03-08	التاريخ
Due On	2023-04-07	تاريخ الاستحقاق
Exchange Rate	1 SAR = 1 SAR	سعر الصرف
Matter Name	Legal opinion for service agreement for BLP , Acquire the company of BLP	عنوان المسألة

Create Credit Note
Create Debit Note

When the client decides to discard a service that has been invoiced, a credit note should be created. Learn how to create credit notes in this [guide](#).

If you decide to include additional services or link more matters to your invoice, you must create a Debit Note. Learn how to create debit notes in this [guide](#).

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

Thank you!