

How to Define the Tax Number

Objectives

- Add Company/ Person Tax Number
- Show this number in Invoices and Bills

Steps

In order to show the Tax number in your invoices and bills, you need first to define these values from the corresponding contact's page.

Therefore open the Contacts page, under the **Contacts** in the main menu, choose either **Person** or **Company**, and from the list, choose the contact you want and open their page by clicking on the name or the ID of the contact:

Person:

From the Person's page, you can add the Tax number from the General Info tab

AD

PER00000077 Adam David

Client

General Info

Job Details

Address

Personal Details

Comments

Attachments

Persons

Matters

Contracts & Documents

Reminders

General Info

First Name*

Adam

Mobile

+1 258978548

Middle Name

Phone

+1 568897854

Last Name*

David

Email

Start typing

Adam.david@Blackline.com

Category*

Client

Sub-category

Choose Sub-category

Title

None

Reference #

Tax Number

1258639

Company / Group

Start typing

Country

Albania

Back-Line Company

Additional IDs

Choose One

Privacy

Shared With

Set as Public

Jimmy Peterson

Carolina Robinson

Maysa Hakim

Including Person Creator

Custom Fields

Referred ...

Passport...

Custom ...

Custom ...

Company:

For Companies, the Tax Number is defined under the Entity Management tab

G

COM00000095 Global Tech

General Info

Entity Management

Registration

Registration By Law

Licenses & Waivers

Commercial Registration

Auditors

Company Lawyer

Shareholders

Board Members

Attachments

Assets

Reminders

Registration

Registration Nb

Registration Nb

Registration Date

YYYY-MM-DD

Registration Renewal Date

YYYY-MM-DD

Registration Expiration Date

YYYY-MM-DD

Registration City

Registration City

Registration Tax Nb

8900699

Registration Document

Choose file

Company Duration

Company Duration

Registration By Law

Attestation Authority

Start typing

Registration Authority

Start typing

Ref

Ref

Date

YYYY-MM-DD

Licenses & Waivers



Tax Number is defined for both Clients and Suppliers from their detailed pages.

Once done, the Tax number will be automatically retrieved when creating a new invoice or bill and after specifying the client's or supplier's account

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

app4legal - USD

Client

Matters

Items

Additional Info

Client Account

Adam David

Invoice Templates

Proforma Template

Invoice Number

INV-0000027

PER00000077: Adam David

Currency: USD

Tax Number: 1258639

Bill To: Adam David

Invoice

ALA Law Firm

Phone number:12334423

Registration number:1234

Tax Number: 1223232

COMPANY NAME

Company Slogan

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

app4legal - USD

BIL-00108 - Draft

Supplier *

Global Tech - USD

Date *

12/10/2023

Client's Account

Start typing

Related Matter

Start typing

Supplier Bill#

Tax Number

8900699

Bill Summary

Supplier Bill#

Supplier Name

Date

Due date

Bill Reference

Subtotal (USD)

Total tax (USD)

Total

Global Tech - USD

2023-12-10

2023-12-10

00108

0.00

0.00

0.00 USD

Bill Details

Account *	Description	Quantity	Price (USD)	Client Details	Tax (%)	Amount (USD)
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For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!