

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

The screenshot shows the 'General Info' tab for a person named Adam David (ID: PER0000077). The 'Tax Number' field is highlighted with a red box and contains the value '1258639'. Other fields include First Name (Adam), Middle Name, Last Name (David), Category (Client), Sub-category (Choose Sub-category), Title (None), Reference #, Company / Group (Back-Line Company), Mobile (+1 258978548), Phone (+1 568897854), Email (Adam.david@Blackline.com), Country (Albania), and Additional IDs (Choose One).

Company:

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

The screenshot shows the 'Entity Management' tab for a company named Global Tech (ID: COM0000095). The 'Registration Tax Nb' field is highlighted with a red box and contains the value '8900699'. Other fields include Registration Nb, Registration Date (YYYY-MM-DD), Registration Renewal Date (YYYY-MM-DD), Registration Expiration Date (YYYY-MM-DD), Registration City, Registration Document (Choose file), Company Duration, Attestation Authority (Start typing), Registration Authority (Start typing), Ref, and Date (YYYY-MM-DD).



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

Dashboards Clients Invoices Expenses Time Entries **Suppliers** Partners Reports Advanced app4legal - USD

BIL-00108 - Draft ? Save

Supplier *
Global Tech - USD

Date *
12/10/2023

Client's Account
Start typing

Related Matter
Start typing

Supplier Bill#
Tax Number
8900699

Supplier Bill#	
Supplier Name	Global Tech - USD
Date	2023-12-10
Due date	2023-12-10
Bill Reference	00108
Subtotal (USD)	0.00
Total tax (USD)	0.00
Total	0.00 USD

Account *	Description	Quantity	Price (USD)	Client Details	Tax (%)	Amount (USD)
-----------	-------------	----------	-------------	----------------	---------	--------------

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

Thank you!