How to Enable Analytic Accounts

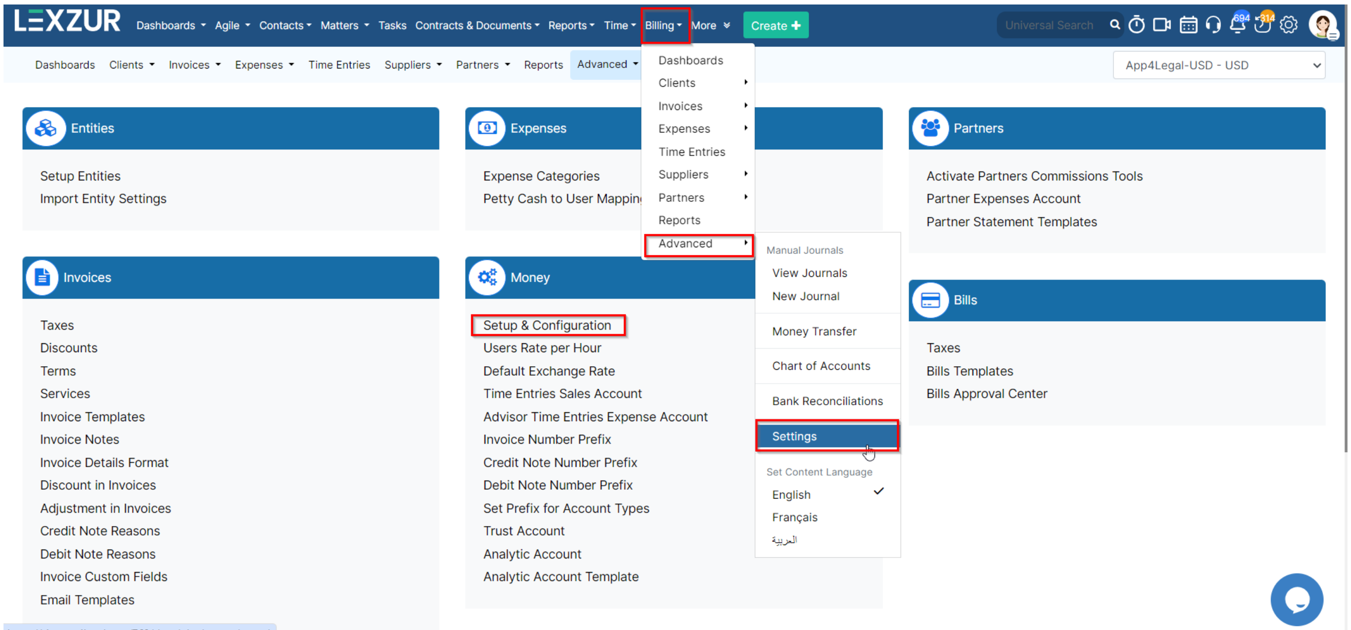
Objectives:

- Enable the Analytic Account
- Add Analytic Categories and Templates

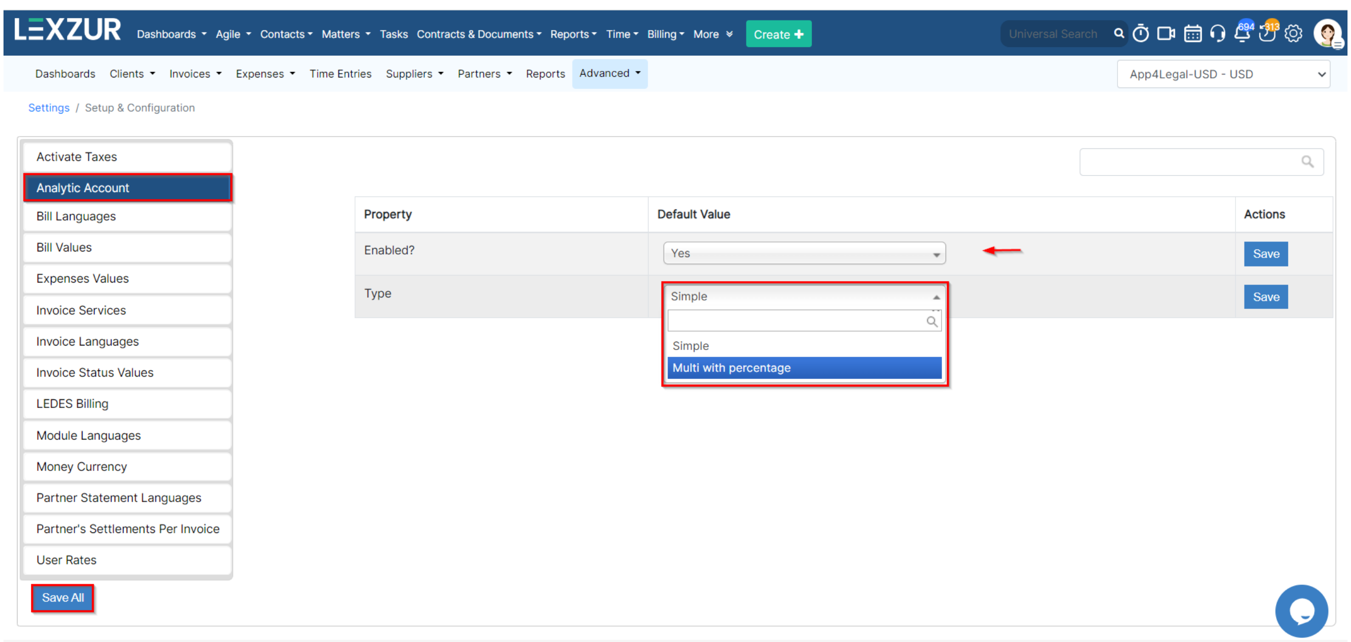
Steps:

Lexzur's billing module now supports analytical accounting, specifically introducing the cost center feature. This update enables the management of multiple cost centers within the billing forms, empowering users to allocate a percentage to each specific cost center.

To activate analytical accounting, navigate to **Billing Advanced Settings   Setup and Configuration.**

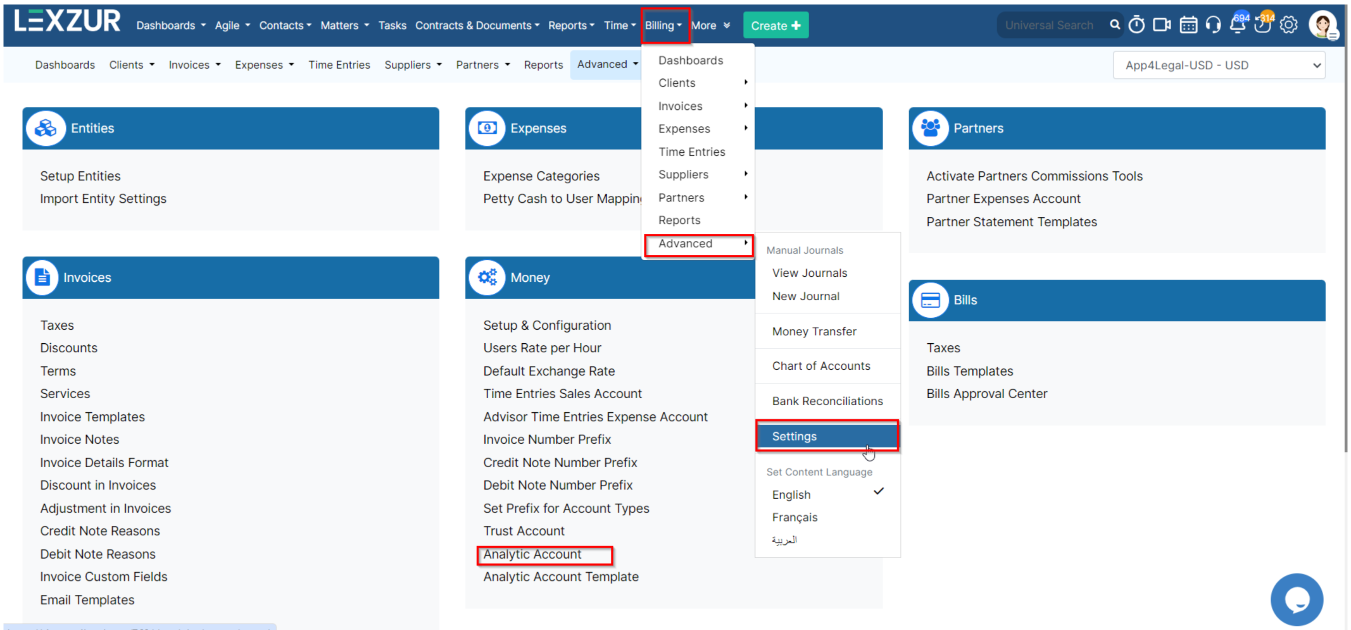


Within the Analytic Account tab, enable the feature and choose between a **simple** or **multi with a percentage.** And Save all the changes once done.

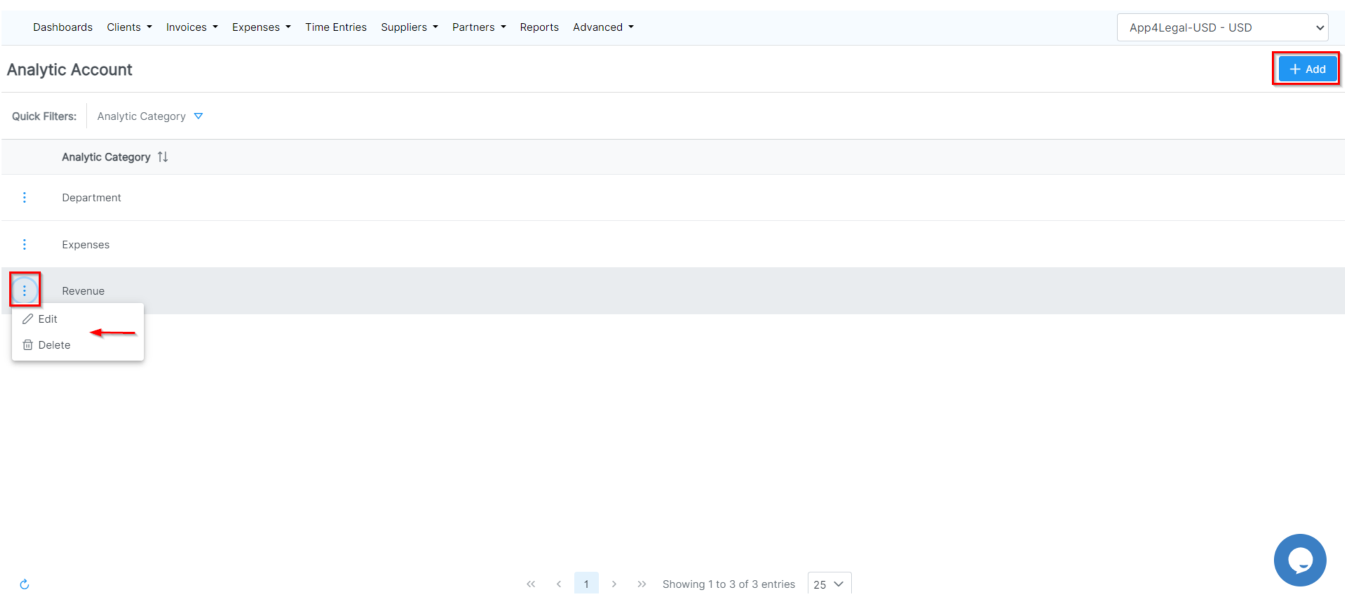


⚠ Multi with percentage allows the addition of multiple items with varying percentages for each analytic category. For the simple option, only one item of 100% can be chosen for each analytic category.

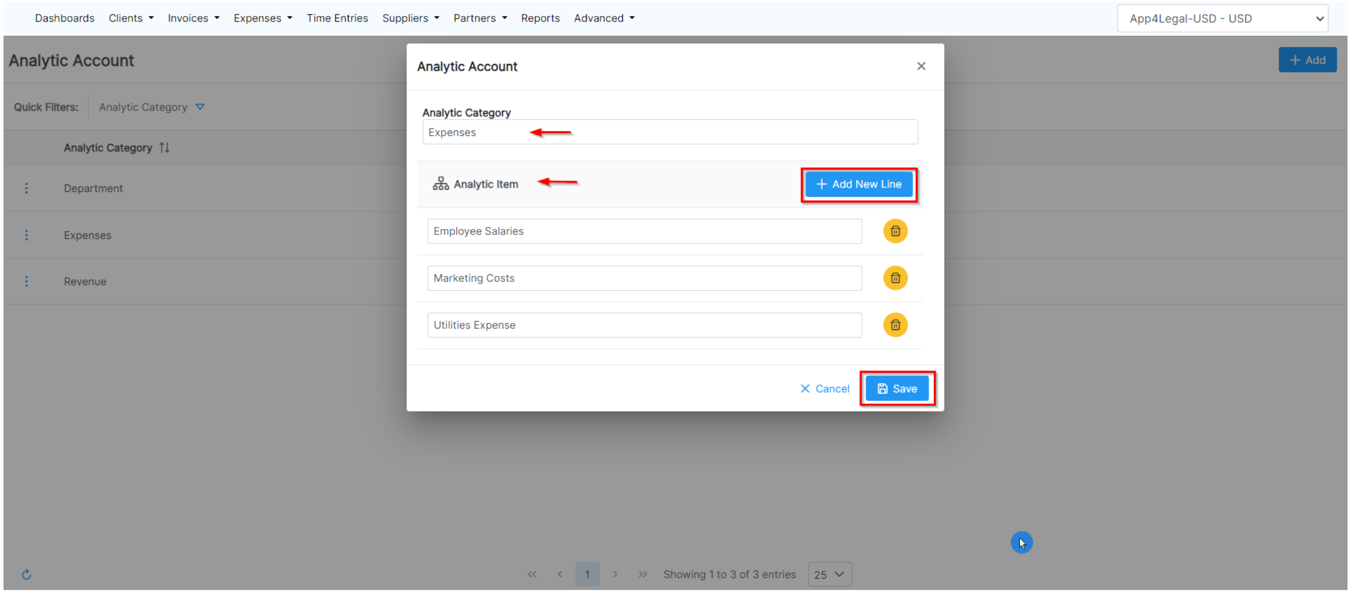
Next, create analytic account categories and templates by going back to **Billing Settings Money Analytic Account.**



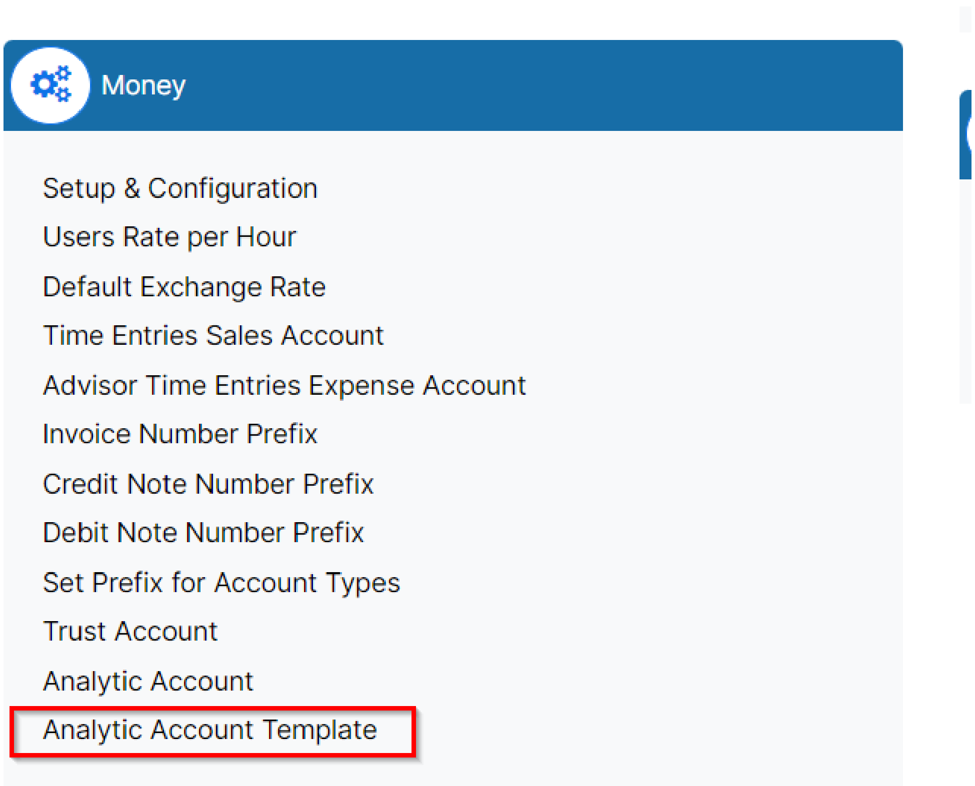
From this page, you can add and manage Analytic Categories as needed.



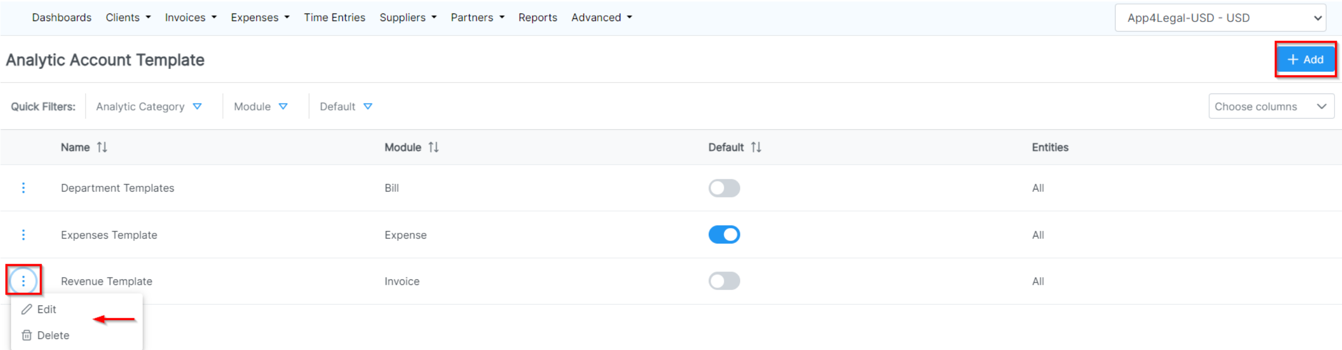
Click "Add" to create a new category, name it, and add related items as necessary.



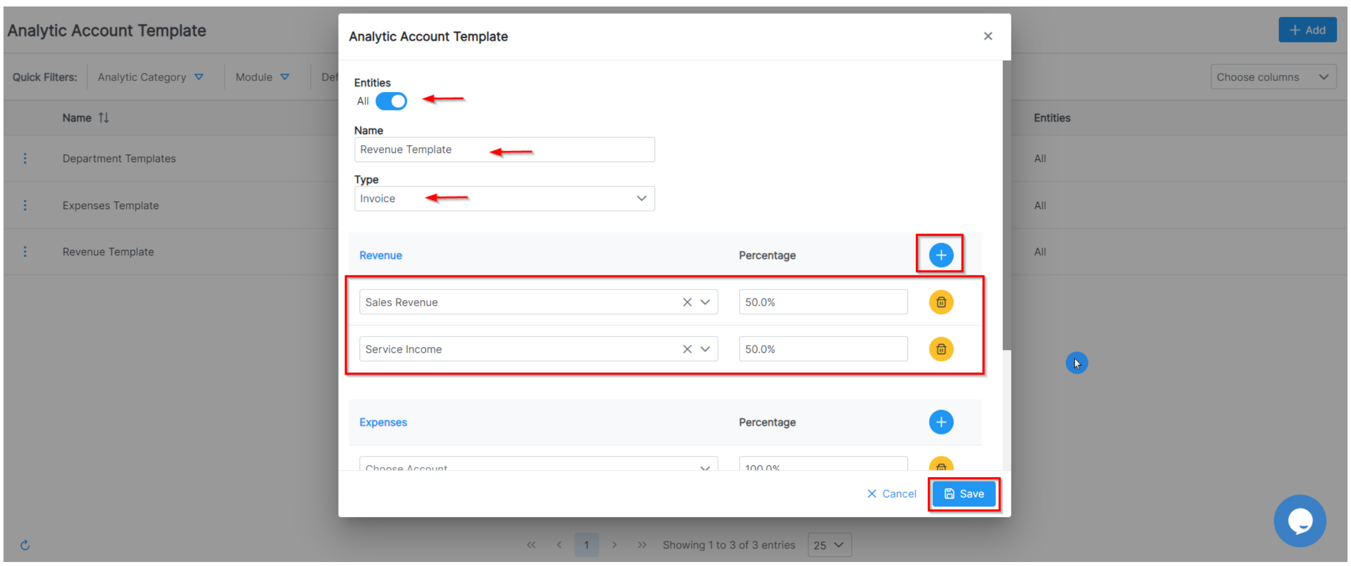
Now, create templates based on the categories by going back to **Billing Settings   Money Analytic Account Template.**



Here you can add and manage Analytic Account Templates as needed

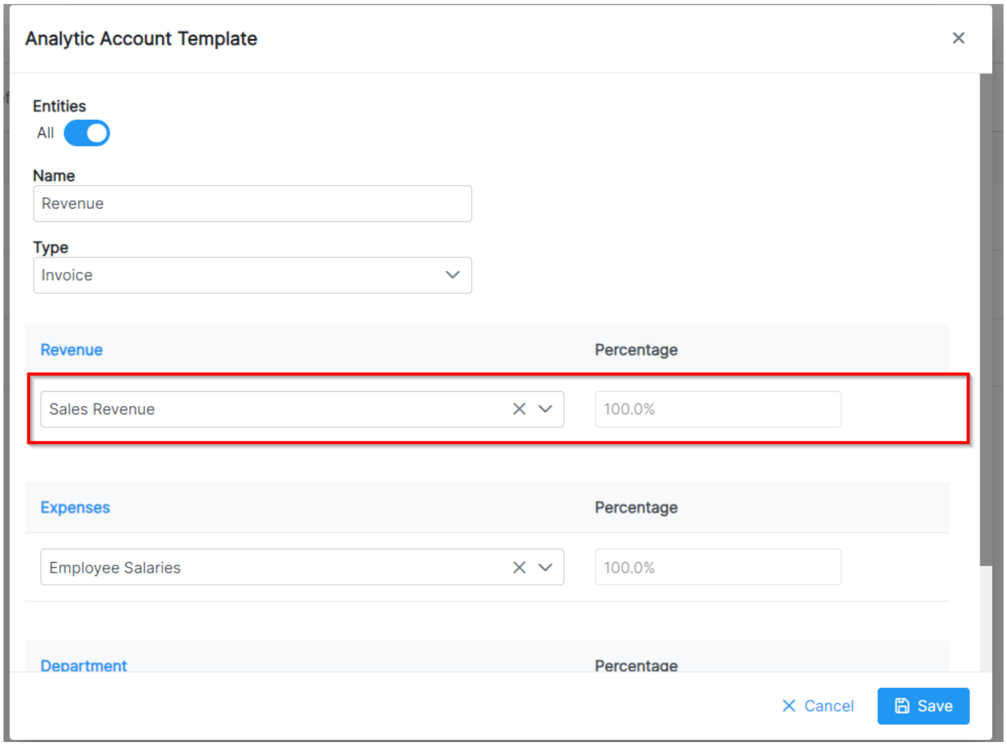


Click "Add" to create a new template, specify if it applies to all entities or a specific one, name the template, select its type (Invoices, Bills, or Expenses), and assign percentages to each category's related items.



⚠ If the multi-type is chosen, distribute the 100% among the selected items without exceeding the total.

⚠ In the case of **Simple** type, you can only choose one item under each category of 100%



Additionally, you can set the template as default for automatic application or distribute items as needed later on.

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

Thank you!