

How to Enable Analytic Accounts

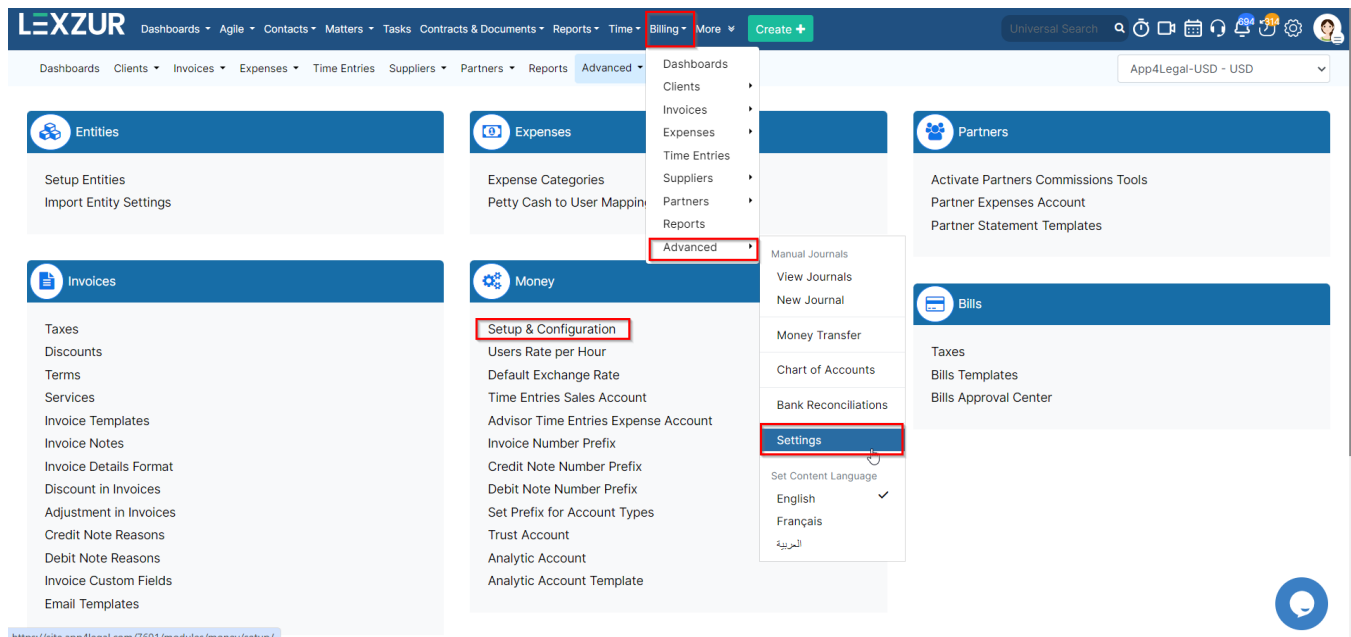
Objectives:

- Enable the Analytic Account
- Add Analytic Categories and Templates

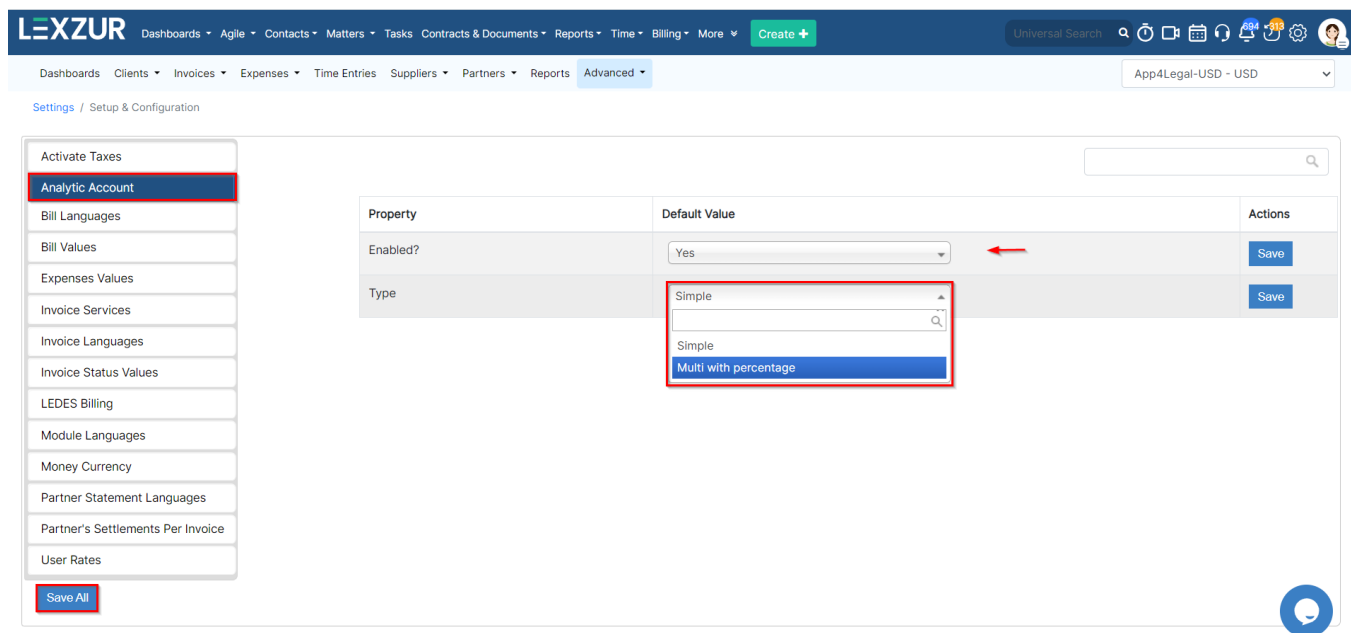
Steps:

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.





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

The screenshot shows the Lexzur application interface. The top navigation bar includes the Lexzur logo and a list of menu items: Dashboards, Agile, Contacts, Matters, Tasks, Contracts & Documents, Reports, Time, Billing, More, and Create. The 'Billing' menu item is highlighted with a red box. Below the navigation bar, the main content area is divided into several sections. On the left, there are four main menu items: Entities, Expenses, Invoices, and Money. Each item has a corresponding icon and a list of sub-items. The 'Advanced' dropdown menu is open, showing a list of sub-items: Dashboards, Clients, Invoices, Expenses, Time Entries, Suppliers, Partners, Reports, and Advanced. The 'Advanced' item is highlighted with a red box. The 'Settings' item in the 'Advanced' dropdown menu is also highlighted with a red box. The 'Settings' item has a sub-menu with the following items: Manual Journals, View Journals, New Journal, Money Transfer, Chart of Accounts, Bank Reconciliations, Settings, Set Content Language, English, Français, and العربية. The 'Settings' item is highlighted with a red box. The 'Advanced' dropdown menu is also open, showing a list of sub-items: Dashboards, Clients, Invoices, Expenses, Time Entries, Suppliers, Partners, Reports, and Advanced. The 'Advanced' item is highlighted with a red box. The 'Settings' item in the 'Advanced' dropdown menu is also highlighted with a red box. The 'Settings' item has a sub-menu with the following items: Manual Journals, View Journals, New Journal, Money Transfer, Chart of Accounts, Bank Reconciliations, Settings, Set Content Language, English, Français, and العربية. The 'Settings' item is highlighted with a red box.

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

Dashboards
Clients
Invoices
Expenses
Time Entries
Suppliers
Partners
Reports
Advanced

App4Legal-USD - USD

Analytic Account

Quick Filters:

Analytic Category

Analytic Category	
⋮	Department
⋮	Expenses
⋮	Revenue

⋮

Edit
Delete

Showing 1 to 3 of 3 entries
25

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

Dashboards Clients Invoices Expenses Time Entries Suppliers Partners Reports Advanced App4Legal-USD - USD

Analytic Account

Quick Filters: Analytic Category

Analytic Category 11

- Department
- Expenses
- Revenue

Analytic Account

Analytic Category Expenses

Analytic Item

+ Add New Line

Employee Salaries


Marketing Costs

Utilities Expense

X Cancel Save

<< < 1 > >> Showing 1 to 3 of 3 entries 25

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

 **Money**

- Setup & Configuration
- Users Rate per Hour
- Default Exchange Rate
- Time Entries Sales Account
- Advisor Time Entries Expense Account
- Invoice Number Prefix
- Credit Note Number Prefix
- Debit Note Number Prefix
- Set Prefix for Account Types
- Trust Account
- Analytic Account
- Analytic Account Template**

Here you can add and manage Analytic Account Templates as needed

Dashboards Clients Invoices Expenses Time Entries Suppliers Partners Reports Advanced App4Legal-USD - USD

Analytic Account Template

Quick Filters: Analytic Category Module Default Choose columns

Name	Module	Default	Entities
Department Templates	Bill	<input type="checkbox"/>	All
Expenses Template	Expense	<input checked="" type="checkbox"/>	All
Revenue Template	Invoice	<input type="checkbox"/>	All

Edit Delete

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.

Analytic Account Template

Quick Filters: Analytic Category Module Default Choose columns

Name	Module	Default	Entities
Department Templates	Bill	<input type="checkbox"/>	All
Expenses Template	Expense	<input checked="" type="checkbox"/>	All
Revenue Template	Invoice	<input type="checkbox"/>	All

Add

Choose columns

Analytic Account Template

Entities: All

Name: Revenue Template

Type: Invoice

Revenue	Percentage
Sales Revenue	50.0%
Service Income	50.0%

Expenses

Choose Account

100.0%

Cancel Save



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%

Analytic Account Template

×

Entities

All ☒

Name

Revenue

Type

Invoice

Revenue

Percentage

Sales Revenue

×

100.0%

Expenses

Percentage

Employee Salaries

×

100.0%

Department

Percentage

×

Cancel

Save

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!