

How to Manage Expenses

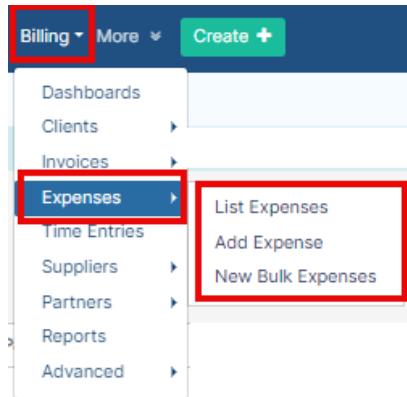
Objectives

- Record new expense
- Access and edit all the expenses

Steps

From the Billing Module, you can manage expenses which can be court fees, expert fees, translation, and so on.

To Access it, you can directly click on **Billing Expenses**, and choose the option you need.



To record a new expense click on **Expenses Add Expense**.

i You can also record expenses from the **Tools** button in the expenses grid or from the quick **New** button in the main menu.

Paid On	Expense ID	Reference #	Expense Category	Expense Amount	Payment Method	Paid Through	Paid Through Account Number	Supplier Name	Billing Status	Related Invoice	Status	Client Name	Client Account
□	2023-12-06	00000324	Contribution to the Judges Funds	100.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Approved	Maria Smith	Maria Smith
□	2023-12-05	00000323	Office / Internet & Telephone	200.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Approved	Maria Smith	Maria Smith
□	2023-12-04	00000327	Printing & Copying	500.00	Cash	Alice Petty Cash - USD	CASH1334565695		invoiced	INV110	Approved	Maria Smith	Maria Smith
□	2023-12-01	00000325	Office / Internet & Telephone	500.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Approved	Maria Smith	Maria Smith
□	2023-12-01	00000321	Office / Internet & Telephone	500.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Approved	Brand Line Company	Brand Line C
□	2023-11-27	00000316	Office / Internet & Telephone	500.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Open	Advanced Industries	Advanced Ind
□	2023-11-27	00000317	Office / Office Supplies	400.00	Cash	Cash account - USD	CASH1334565694		invoiced	INV106	Approved	Albert smith	Albert smith
□	2023-11-27	00000319	Court Fee	1,000.00	Credit Card	Alice Card Account - USD	CC1		invoiced	INV107	Approved	Albert smith	Albert smith

Fill out the mandatory fields:

- **Expense Category:** Categories default in the Billing Settings.
- **Payment Method:** The method determines the types of accounts that appear accordingly:
 1. **Cash:** Cash Accounts
 2. **Credit Card:** Liability of type Credit Card Accounts
 3. **Cheque & Bank:** Bank Accounts
 4. **Online payment:** Bank Accounts and Credit Card Accounts
 5. **Other:** Cash, Bank, and Credit Card Accounts
- **Paid Through Account:** The Account that appears as per the Payment Method. Accounts can be added on the fly via the Add account hyperlink.
- **Amount**
- **Paid On:** date of the expense payment.

Add New Expense

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Expense Info Expense Allocations

Expense Info

Expense Category *

Payment Method *

Paid Through *

Amount *

Paid On *

Inclusive Tax

Reference #

Supplier

Comments

Attach File

Additional information could be the Tax, Reference number, supplier, comments, or any related documents that could be attached as well.

Expenses could be related to matters, contracts, tasks, or hearings. Therefore you can specify this while adding the expense from the **Expense Allocation** Tab.

Expenses could also be Internal or Client-related. In the case of Client-related Expenses, you have to specify if it will be billable or not and add the client account accordingly.

Add New Expense

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Expense Info Expense Allocations

Expense Allocations

Related Matter

Expense Type

Billing Status

Client *

Client Account *

Related Task

Related Hearing

Related Event

All the expenses will be then listed in the Expense Grid, simply access it from **Billing Expenses List Expenses** from the navigation menu.

The expenses grid is where you can track and manage all the Expenses recorded, Advance your search, get reports, add bulk expenses, and so on.

All the expenses added can be viewed in the list along with their details, such as amount, status, related client account, and so on.

A screenshot of the Expenses list grid. The grid shows 1 - 20 of 113 items. Each row contains details like Paid On, Expense ID, Reference #, Expense Category, Expense Amount, Payment Method, Paid Through, Paid Through Account Number, Billing Status, Status, Client Name, and a small profile picture. A context menu is open for the row with Expense ID 00000207, which includes options: View / Edit, Change Billing Status, Approve, Move to needs revision, Cancel, and Delete. The entire context menu area is highlighted with a red box.

Paid On	Expense ID	Reference #	Expense Category	Expense Amount	Payment Method	Paid Through	Paid Through Account Number	Billing Status	Status	Client Name
2023-05-03	00000208		Transportation Fee	100.00	Cash	Cash account - USD	1334565694	invoiced	Approved	BTL Ins
2023-05-02	00000207		Renewal Fee	100.00	Cash	petty cash Samira - USD	125	to-invoice	Open	Michelli
	00000206		Advance of Expert Fee	563.00	Cash	Alice Petty Cash - USD	1334565695	internal	Open	
	00000205		Advance of Expert Fee	500.00	Cash	Alice Petty Cash - USD	1334565695	internal	Open	
	00000204		Advance of Expert Fee	500.00	Cash	Alice Petty Cash - USD	1334565695	internal	Open	
2023-04-28	00000203		BBA Fee	800.00	Cash	Alice Petty Cash - USD	1334565695	non-billable	Open	Alvah S
2023-04-28	00000202		Built Property Tax	500.00	Cash	Cash account - USD	1334565694	internal	Open	
2023-04-28	00000201		Advance of Expert Fee	2,500.00	Cash	Alice Petty Cash - USD	1334565695	to-invoice	Open	Jennife
2023-04-28	00000200		Transportation Fee / Fuel	100.00	Cash	Cash account - USD	1334565694	to-invoice	Approved	Propert
2023-04-27	00000199		Court Fee	1,200.00	Cash	Alice Petty Cash - USD	1334565695	to-invoice	Open	Alvah S
2023-04-20	00000198		Transportation Fee	100.00	Cash	petty cash Samira - USD	125	to-invoice	Open	
2023-04-13	00000197		Court Fee	1,000.00	Cash	Cash account - USD	1334565694	reimbursed	Approved	App Ind

There are certain actions a user can do from the settings wheel next to an expense (view/edit, change billing status, etc.).

The admin can set an approval process. Therefore, responsible users such as **accountants**, can edit the expense information, approve, review, or cancel an expense before being invoiced.

A screenshot of the expense detail view for Expense ID 00000329. The General Info tab is selected. The right side shows a status dropdown with options: Open, Approved, Open, Open, Cancelled, and Needs Revision. The 'Open' option is currently selected. A context menu is open over the status dropdown, showing the same six options. The status dropdown itself is also highlighted with a red box.

Expense ID: 00000329

Expense Category: Hotel
Payment Method: Cash
Paid Through: Alice Petty Cash (CASH1334565695)
Amount: USD 2,000.00
Comments: (No Data)

Paid On: 2023-12-11
Inclusive Tax: --
Reference #: --
Supplier: --

Status
Billing Status

Client
Client Account

! Invoiced and Reimbursed expenses can not be edited or deleted.

i Reimbursed Expenses are expenses that are invoiced and the related invoice has been paid

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

Thank you!