

How to Manage Suppliers Accounts

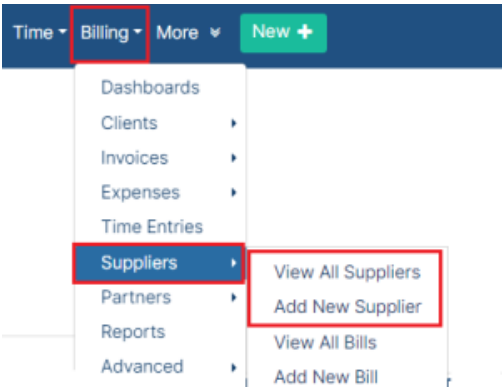
Objectives

- Add Supplier's Accounts
- Manage the account financials

Steps

Managing supplier accounts within the billing module is a straightforward process designed to ensure efficient financial transactions.

Begin by accessing the Suppliers list through the navigation menu: **Billing Suppliers View all Suppliers**



From this page, you can see the list of your suppliers with their account details.

Dashboards Clients Invoices Expenses Time Entries Suppliers Partners Reports Advanced App4Legal-USD - USD									
Suppliers		Search		Advanced Search					
Supplier Name				Supplier Type					
CBD				Company					
abc				Company					
Advanced Solutions				Company					
ABC Services				Company					
Albert smith				Person					
Global Tech				Company					
Common Law				Company					
Peter Legal				Company					
Sedibelo Resources				Company					
Mustafa Co				Company					
SA Trading Company				Company					
Peter Finance				Company					
SSC Software				Company					
BLP Industry				Company					

To add a new supplier you can either do it from the **Actions** in this page or directly from the **Billing** drop-down list from the navigation menu.

Two essential fields are required "Supplier Name" and "Account Number".

Suppliers in LEXZUR can take the form of companies or individual contacts. Therefore search for an existing contact or add a new one on the fly.

The flexibility extends to the account number prefix, which can be added or edited conveniently from the billing settings.

Add New Supplier

Supplier Name*

Company / Group

Start typing

Account Number*

SUP 22

Account Currency

USD

Account Description

Save

A supplier in LEXZUR can have several accounts in different currencies. In order to manage supplier accounts, go to the supplier grid and click on the supplier Name. A table of all the available accounts is displayed. You can add a New Account from the button on the top right.

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

App4Legal-USD - USD

Audit

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Related Expenses

Related Bills

New Account

Related Accounts

Name	Balance Due	Currency	Description
Global Tech (SUP14)	-1,500.00	USD	
Global Tech (SUP22)	0.00	EUR	

Edit Account

Delete Account

You can here track also the list of **expenses** and **bills** related to the supplier accounts.

i A new account can also be added from the action wheel next to each supplier from the suppliers Grid

Albert smith

Global Tech

Common Law

Peter Legal

New Account

To add a new account, simply specify the account name, number, and choose the currency.

New Account for "Global Tech"

Add New Account

Account Name*

Global Tech

Account Number*

22

Currency*

USD

Description

☐ Is visible in the Advisor Portal

Save

Cancel

You can also manage the visibility of these accounts in the Advisor Portal.

The action wheel next to the supplier accounts allows you to either Edit or Delete the account.

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

Thank you!