

# How to Manage Partners Accounts

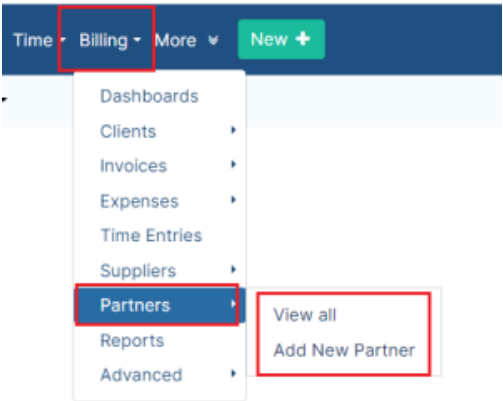
## Objectives

- Add Partner's Accounts
- Manage the account financials

## Steps

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

Begin by accessing partners through the navigation menu: **Billing Partners View all**



From this page you can see the list of your partners with their accounts details.

Dashboards Clients Invoices Expenses Time Entries Suppliers Partners Reports Advanced									
App4Legal-USD - USD									
Partners Search Advanced Search									
Actions - Add New Partner Export to Excel									
Partner Name	Partner Type	Is Third Party?							
LLP Services	Company	No							
ABC Services	Company	No							
Peter Legal	Company	No							
Alberto Scott	Person	No							
Common Law	Company	No							
BLP Industry	Company	No							

To add a new partner 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 "Partner Name" and "Account Number".

Partners 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 Partner

Partner Name\*

Company / Group

Start typing

☐ Is Third Party?

Account Number\*

PAR 9

Account Currency

USD

Account Description

Save

A Partner in LEXZUR can have several accounts in different currencies. In order to manage Partner Accounts, go to the Partner grid and click on the Partner 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

Related Accounts

New Account

Name	Balance Due	Currency	Description
Common Law (PAR6)	-4,116.50	USD	
<div><div></div>Common Law (PAR8)</div>	0.00	AED	

Zoom In

Settlement Of Partner Account

Export Statement

Edit Account

Delete Account



A new account can also be added from the action wheel next to each partner from the Partners Grid

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

New Account for "Common Law"

Add New Account

Account Name\*

Common Law

Account Number\*

8

Currency\*

AED

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 Partner accounts allows you to:

- **Zoom In:** This displays all the transactions of the selected account filtered by date

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

App4Legal-USD - USD

From Date

>=

2023-01-01

To Date

<=

2024-01-01

Submit

Transactions of Common Law - USD (PAR6)

Date	Description	Type	Debit	Credit
2023-08-02	Partners Shares - INV0000099	INV		40.00
2023-08-02	Partners Shares - INV0000099	INV		20.00
2023-08-02	Partners Shares - INV0000099	INV		20.00
2023-06-20	CRD0000003 - Partners Shares	CRN	50.00	
2023-06-08	Partners Shares - INV0000088	INV		30.00
2023-06-08	Partners Shares - INV0000088	INV		50.00
2023-05-26	Partners Shares - INV0000084	INV		50.00
2023-05-26	Partners Shares - INV0000084	INV		10.00
2023-05-26	Partners Shares - INV0000084	INV		50.00
2023-05-26	Partners Shares - INV0000084	INV		50.00
2023-04-20	Partners Shares - INV0000071	INV		50.00
2023-04-13	Partners Shares - INV0000070	INV		28.00
2023-04-13	Partners Shares - INV0000070	INV		20.00
2023-04-12	Partners Shares - INV0000068	INV		53.50

- **Create a Settlement of Partner Account**

Settlement Of Partner Account

Paid Through\*

Choose Account

Amount\*

4116.5

Paid On\*

2023-08-09

Comments

Settlement Of Partner Account

Save

Cancel

- **Export the Statement of this Account**

Export Partner Statement

Partner Statement Templates\*

partner's template

From Date

2023-01-01

To Date

2023-08-09

Run

<input checked="" type="checkbox"/>	Invoice Number	Date	Status
<input checked="" type="checkbox"/>	INV0000044	2023-02-07	partially paid
<input checked="" type="checkbox"/>	INV0000047	2023-02-10	partially paid
<input checked="" type="checkbox"/>	INV0000051	2023-02-15	partially paid
<input checked="" type="checkbox"/>	INV0000053	2023-02-01	partially paid
<input checked="" type="checkbox"/>	INV0000019	2023-03-06	open
<input checked="" type="checkbox"/>	INV0000056	2023-03-09	partially paid
<input checked="" type="checkbox"/>	INV0000061	2023-03-21	paid
<input checked="" type="checkbox"/>	INV0000025	2023-03-30	partially paid
<input checked="" type="checkbox"/>	INV0000062	2023-03-31	paid
<input checked="" type="checkbox"/>	INV0000026	2023-03-31	paid
<input checked="" type="checkbox"/>	INV0000065	2023-04-05	cancelled
<input checked="" type="checkbox"/>	INV0000068	2023-04-12	open
<input checked="" type="checkbox"/>	INV0000070	2023-04-13	paid
<input checked="" type="checkbox"/>	INV0000064	2023-04-05	draft



• Edit or Delete the Account

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!