

How to Manage Your Accounts

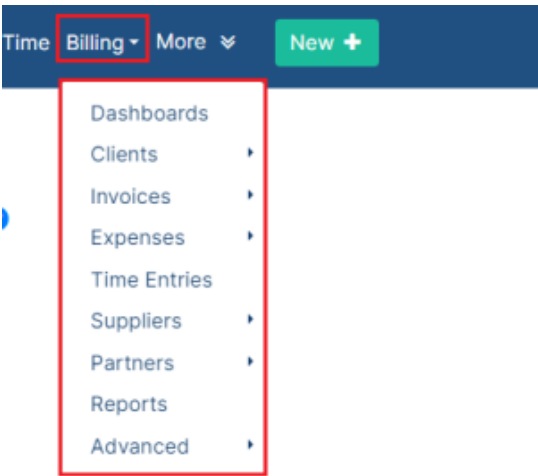
Objectives

- [Add Accounts in the Billing Module](#)
- [Manage your Accounts](#)

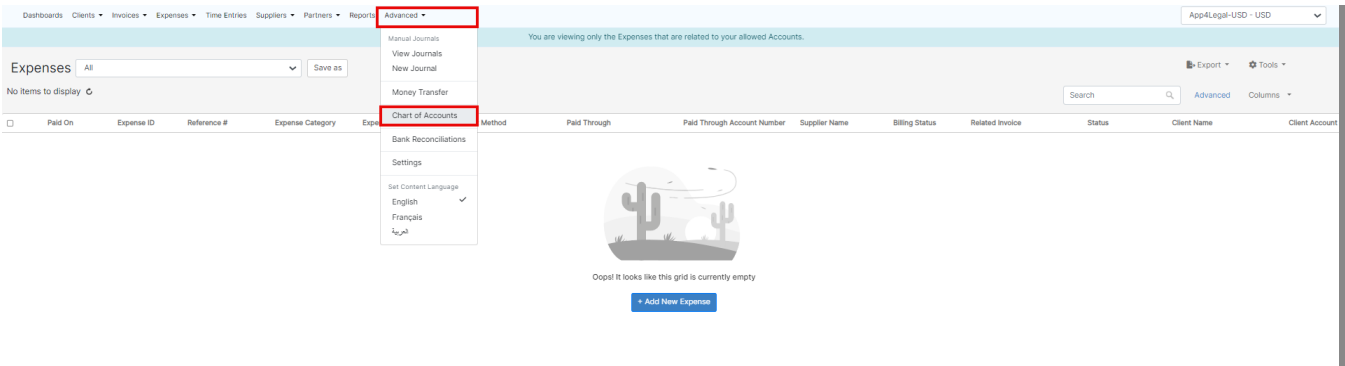
Steps

The chart of accounts in LEXZUR is where you can centralize all your accounts in the system.

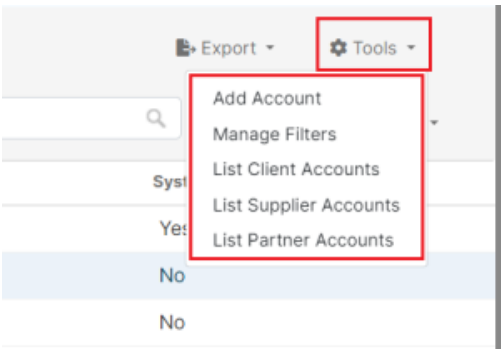
You can access it directly from the main menu, from the Billing module by simply clicking **Billing Advanced Chart of Accounts**.



or from the Billing Module Menu:



Via the **Tools** button on the top right. you can Add an Account, and List the Clients, Suppliers, or Partners' accounts.



To **Add Accounts**, you must fill out the following:

- **Account Name**
- **Account Type**
- **Account Number**
- **Currency**

[Settings](#) / [Chart of Accounts](#) / Add New Account

Add New Account

Account Name (English)*

Account Name (English)

Account Name (Français)

Account Name (Français)

Account Name (العربية)

Account Name (العربية)

Account Type*

Bank

Account Number*

1234592

Currency*

USD

Description (English)

> More Fields

☒ Show in dashboard

☐ Is visible in the Advisor Portal

☒ Visible to all users

☐ Save and Create Another

Save

Account Types could be Asset, Expense, Liability, and so on.

Add New Account

Account Name*

Account Name

Account Type*

Choose One

Currency*

Description

Choose One

Asset

Bank

Cash

Fixed Asset

Other Asset

Trust Asset Account

Expense

Cost of Goods Sold

Expense

Other Expense

Liability

Credit Card

Long Term Liability

Other Liability

Equity

Equity

Income

Income



You can directly set some Account settings such as to make it visible for all users, to the advisor portal, and on the dashboards.

This **Chart of Accounts** grid displays all your Account details, along with their balance.

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

App4Legal-USD - USD

Accounts

All

Save as

Export

Tools

1 - 20 of 39 items

Search

Advanced

Columns

Account Name (English)	Account Number	Account Type	Currency	Balance	System Account
Advertising & Marketing	2	Expense / Expense	USD	-1,000.00	Yes
Advisor Expenses	2	Expense / Other Expense	USD	400.00	No
Alice Card Account	1	Liability / Credit Card	USD	0.00	No
Alice Petty Cash	1334565695	Asset / Cash	USD	15,869.40	No
bank account 12342	1234590	Asset / Bank	USD	57,028.55	No
BBC Bank Account	125	Asset / Bank	USD	195,100.00	No
Car & Taxi	8	Expense / Expense	USD	5,414.00	Yes
Cash account	1334565694	Asset / Cash	USD	-32,956.80	No
Cash LBP	1334565693	Asset / Cash	LBP	272,727.27	No
Discount	13	Income / Income	USD	8,104.05	Yes
Exchange gain or loss	12	Expense / Expense	USD	0.00	Yes
Firm expenses	13	Expense / Expense	USD	3,007.00	No
Fixed	2	Asset / Fixed Asset	USD	0.00	No
Furniture & Equipment	1	Asset / Fixed Asset	USD	-18,500.00	Yes

You can from here view, edit, or delete accounts directly from the action wheel next to each account's name.

Accounts		All
1 - 20 of 39 items		
Account Name (English)		
Advertising & Marketing		
Advisor Expenses		
Alice Card Account		
Alice Petty Cash		
bank account 12342		
BBC Bank Account		
Car & Taxi		



View / Edit

Delete



System Accounts cannot be deleted

Chart of Accounts can also be viewed from the Billing **Reports** page, and you can export the list to Excel for the reporting purposes

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

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Expenses

Statement of Expenses

Expenses per Client

Accounts

Chart of Accounts

Accounts Payable

Accounts Payable

Accounts Payable Aging Summary

Accounts Payable Aging Details

Accounts Receivable

Accounts Receivable

Accounts Receivable Aging Summary

Accounts Receivable Aging Details

Statement

Account Statement

Client Statement

Trial Balance

Balance Sheet

Detailed Balance Sheet

Income Statement

All Account Statement

General Ledger

Detailed General Ledger

Matters

Judgment Value vs. Matter Value per Client

Uninvoiced Time Entries

Time Entries per Month

Profitability Assessment

Bank

Bank Reconciliations

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