

How to transfer money from an account to other?

Objectives

- Transfer money between accounts

Steps

From the main menu of the application, and upon clicking on **Billing**, go to **advanced** and click on **Money Transfer**.

The screenshot displays the LEXZUR application interface. The top navigation bar includes the LEXZUR logo and a series of menu items: Dashboards, Agile, Contacts, Matters, Tasks, Contracts & Documents, Reports, Time, Billing, and More. The 'Billing' menu is highlighted with a red box, and its dropdown menu is open, showing options like Dashboards, Clients, Invoices, Expenses, Time Entries, Suppliers, Partners, Reports, and 'Advanced', which is also highlighted with a red box. A red arrow points to the 'Money Transfer' option in the dropdown menu. The main content area shows the 'Money Transfer' form with fields for 'From' (Choose Account), 'To' (Choose Account), 'Amount' (?), 'Date' (2023-12-03), 'External Ref. #' (External Ref. #), 'Description' (Description), and 'Document' (Choose File). The bottom right corner features a 'Save' button and a user profile icon.

There are 4 mandatory fields that need to be filled:

- **From:** Select the account you want to transfer the money from.
- **To:** Select the account you want to transfer the money to.
- **Amount:** Select the amount that needs to be transferred.
- **Description**

Dashboards

Clients ▾

Invoices ▾

Expenses ▾

Time Entries

Suppliers ▾

Partners ▾

Reports

Advanced ▾

Money Transfer

From

+ Add New Account

Choose Account

⌵

To

+ Add New Account

Choose Account

⌵

Amount

?

Amount: 0.00 USD

Date

2023-12-03

📅

External Ref. #

External Ref. #

Description

Description

✎

Document

Choose File

No file chosen

Also, you can add new accounts directly from the **Add New Account** hyperlinks.

Dashboards

Clients ▾

Invoices ▾

Expenses ▾

Time Entries

Suppliers ▾

Partners ▾

Reports

Advanced ▾

Money Transfer

From

+ Add New Account

Choose Account

⌵

To

+ Add New Account

Choose Account

⌵

Amount

?

Amount: 0.00 USD

Date

2023-12-03

📅

External Ref. #

External Ref. #

Description

Description

✎

Document

Choose File

No file chosen

Thank you!