How to Create Client Accounts in Different Currencies?

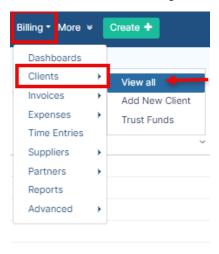
Objectives

Create client accounts in different currencies

Steps

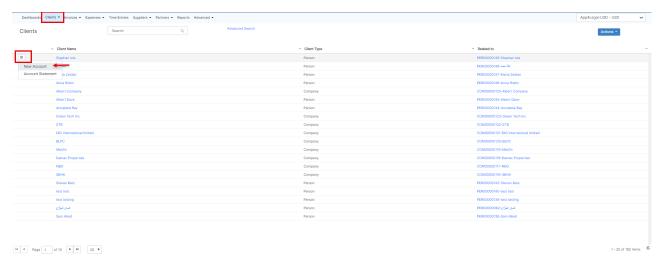
In LEXZUR, you can create multiple clients' accounts in different currencies.

From the main menu, click on Billings Clients View All

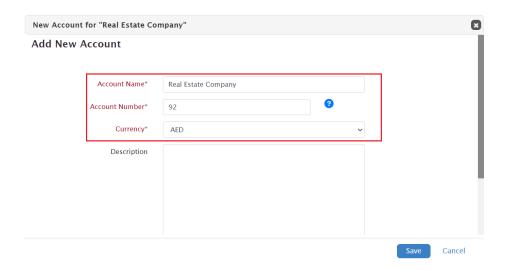


From the Clients Page in the Billing Module, you can view the list of your client's accounts, edit them, add new accounts, and view the Account Statement of each account.

From the actions wheel next to each client name, click on New Account to add an account for the selected client.



A New Account window will appear to fill in the needed information.



There are 3 required fields:

- Account Name: The name of the new account. For example, Jason Robinson which is the client's name.
 Account Number: The number of the account in the system (you can add or edit the prefix of the account number from the billing settings).
- 3. Currency: Choose the currency. For example AED, USD...

Other fields are optional:

- 1. Description: a short hint about the account.
- 2. Bill To: specify the Billing information that will be automatically reflected in the Invoice details when invoicing this client.



You can also manage the Client's Trust Fund deposits. Learn more here.

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