

How to Create Multiple Entities

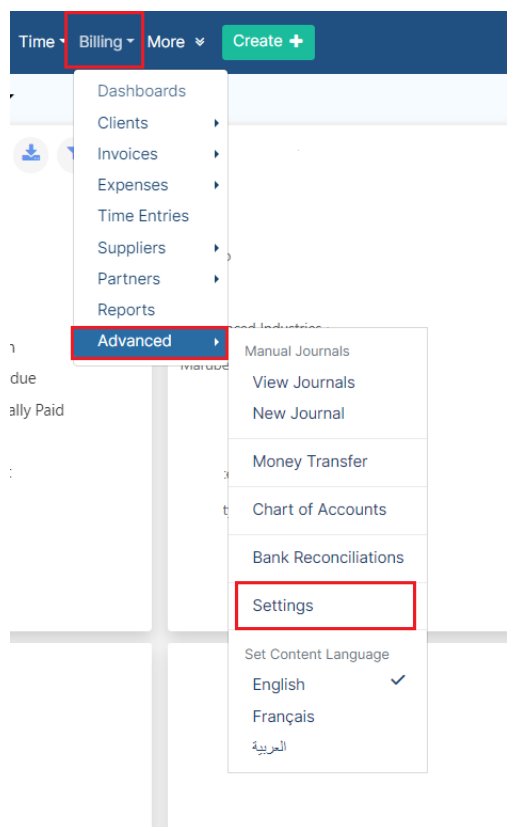
Objectives

- Create multiple entities

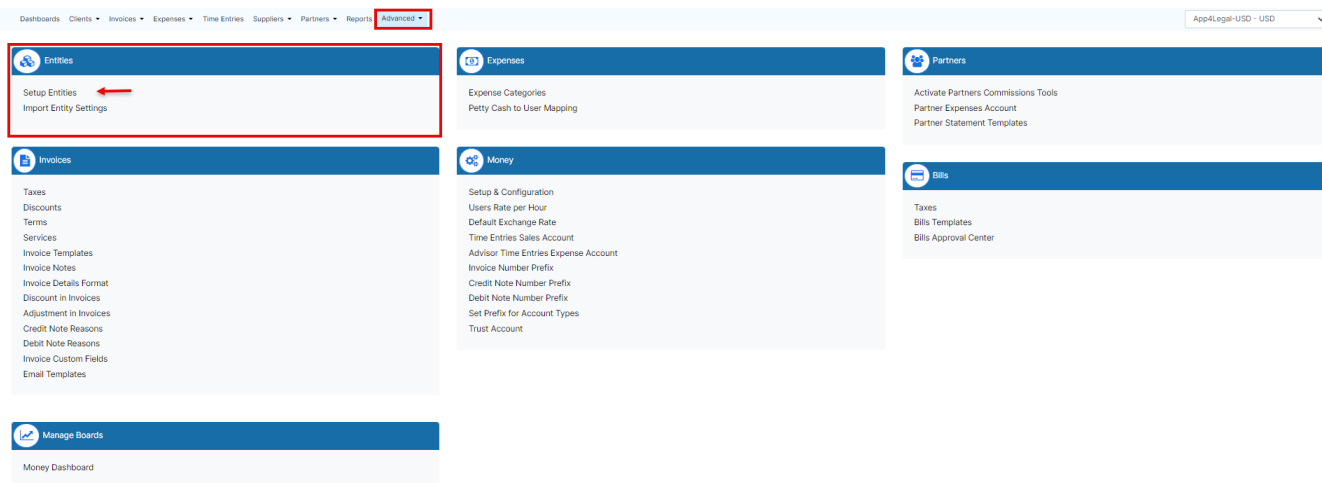
Steps

In cases where a law firm operates in multiple cities or countries, each subject to distinct financial regulations, they have the option to establish separate entities, each with its unique financial settings and configurations.

You can add multiple entities from the billing module settings. First, navigate to **Billing Advanced Settings**:



Within the **Settings**, head to the **Entities** section and click on the **Setup Entities** hyperlink that will direct you to the **List of Entities** page.



From the **List of Entities** page, you can simply add a new entity by clicking on the **Add New Entity** hyperlink.

List of Entities

Entity Name	Fiscal Year Starts On	Base Currency	Menu Color	Status	Actions
Myfirm Instance-AED	January	AED	<div></div>	Active	<div><div></div><div></div></div>
Hegmann-USA LLC	January	USD	<div></div>	Active	<div><div></div><div></div></div>
Sharjah	February	USD	<div></div>	Inactive	<div><div></div><div></div></div>
Invoice	February	USD	<div></div>	Inactive	<div><div></div><div></div></div>
Hegmann Dubai	June	AED	<div></div>	Active	<div><div></div><div></div></div>
RAALC	January	USD	<div></div>	Active	<div><div></div><div></div></div>
Smith and Sons	January	GBP	<div></div>	Inactive	<div><div></div><div></div></div>
Black and Sons Incorporated	March	ZAR	<div></div>	Active	<div><div></div><div></div></div>
App4legal	January	AED	<div></div>	Active	<div><div></div><div></div></div>

Total Records: 9

You will be directed to the **Add New Entity** page where you have to configure the new entity.

LEXZUR

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Add New Entity

1 Basic Configuration

2 Additional Configuration

3 Import Settings

Basic Configuration

Entity Name*

Entity Name

Base Currency*

USD

Address1

Address1

Address2

Address2

Zip

Zip

Website

Website

Fax

Fax

Comments

Comments

Street Name

Street Name

Building Number

Building Number

Menu Color

Fiscal Year Starts On*

Choose One

ID

ID

City

City

State

State

Country

None

Phone

Phone

Mobile

Mobile

Tax Number

Tax Number

Additional IDs

Choose One

Additional ID Value

Address Additional Number

Address Additional Number

Entity Setup & Configuration ?

Invoice Number Prefix*

Debit Note Number Prefix*

Credit Note Number Prefix*

Tax Rounding Method*

Round Globally

The first stage is the Basic Configuration:

There are 7 required fields:

1. Entity Name: the name of the entity. For example LEXZUR.
2. Base Currency: specify the currency used for this entity.
3. Fiscal Year Starts On: specify the starting month.
4. Invoice Number Prefix: the constant prefix for the invoice numbers to be used within this entity.
5. Credit Note Number Prefix: the constant prefix for the credit note numbers to be used within this entity.
6. Debit Note Number Prefix: the constant prefix for the debit note numbers to be used within this entity.
7. Tax Rounding Method: Choose between global rounding or per-line rounding.

The rest of the fields are optional.

Once you finish the basic configuration, press **Next** on the right-bottom of the page to move into the Additional Configuration step.

Additional Configuration

1 AED = *

1.00

AED

1 EUR = *

AED

1 EGP = *

AED

1 GBP = *

AED

1 IDR = *

AED

1 LBP = *

AED

1 MUR = *

AED

1 USD = *

AED

1 ZAR = *

AED

In the Additional Configuration step, you have to first add each currency rate with respect to the main currency of your entity (AED in our example).

Then, you have the option to specify the Related User Groups and the Default User Rate.

Once you finish click on Next to move to the final step.

Related User Groups in User Rates grid

Accountant

Accountant-read-only

Accounting Team

Administrator

Checkers

Finance Team

Legal Team

Makers

System Administrator

User

User-read-only

Default User Rate

Activate Partners Commissions Tools

No

Next

Finish



Add New Entity

- 1 Basic Configuration
- 2 Additional Configuration
- 3 Import Settings

Import Settings

Do you want to import the Entity Settings from other previous Entities? [Click here.](#)

Next

Finish

The last step is optional. If you want to import the Entity Settings from other previous entities you can simply click on the Click here hyperlink, else, click Finish to finish adding the new entity.

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