How to create a Quote in a currency other than the Entity's currency?

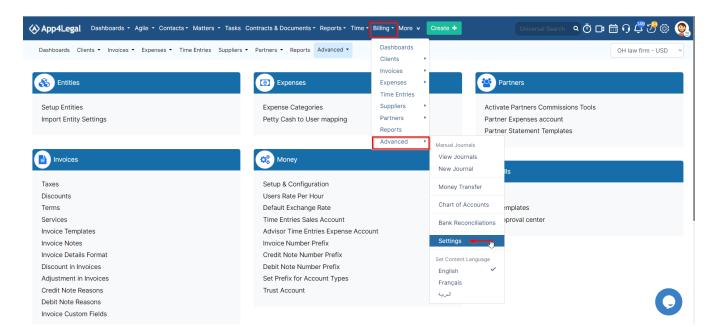
Objectives

• Create a Quote in a different currency

Steps

To create a Quote in a currency other than the Entity's currency, first, you should add the currencies you will be using from the Billing Module.

Go to Billing Advanced Settings



Under Money, click on Setup & Configuration.

| Dashboards Clients ▼ Invoices ▼ Expenses ▼ Time Entries S | Suppliers Partners Reports Advanced | OH law firm | n - USD |
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| & Entities | () Expenses | Partners | |
| Setup Entities | Expense Categories | Activate Partners Commissions Tools | |
| Import Entity Settings | Petty Cash to User mapping | Partner Expenses account Partner Statement Templates | |
| E Invoices | Money | | |
| Taxes | Setup & Configuration | Bills | |
| Discounts | Users Rate Per Hour | Taxes | |
| Terms | Default Exchange Rate | Bills Templates | |
| Services | Time Entries Sales Account | Bills approval center | |
| Invoice Templates | Advisor Time Entries Expense Account | | |
| Invoice Notes | Invoice Number Prefix | | |
| Invoice Details Format | Credit Note Number Prefix | | |
| Discount in Invoices | Debit Note Number Prefix | | |
| Adjustment in Invoices | Set Prefix for Account Types | | |
| Credit Note Reasons | Trust Account | 6 | |
| Debit Note Reasons | | | |
| Invoice Custom Fields | | | |

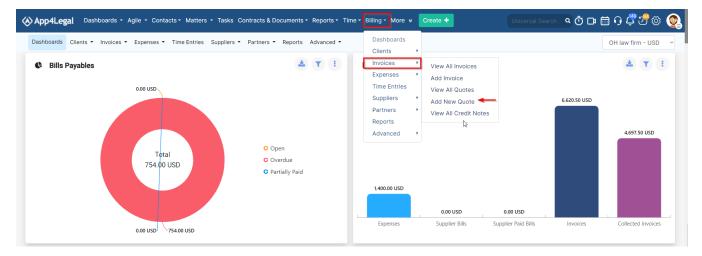
In the Money Currency tab, click on the blank to add more currencies, then click on save.

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| Settings / Setup & Configuration | | | | | |
| Activate Taxes | | | | | Q |
| Bill Languages | | | | | |
| Bill Values | | Property | | Default Value | Actions |
| Expenses Values | | Currencies | | EUR - France | Save |
| Invoice Services | | | | LBP - Lebanon 🗙 | |
| Invoice Languages | | | | SAR - Saudi Arabia x USD - United States x | |
| Invoice Status Values | | | | | |
| Module Languages | | | | | |
| Money Currency | | | | | |
| Partner Statement Languages | | | | | |
| Partner's Settlements Per Invoice | | | | | |
| User Rates | | | | | |
| | | | | | |

After adding the currencies you will likely use, you should create accounts for your clients

Learn more about how to Create Client Accounts in Different Currencies in this guide.

Once you did these steps, you can add a quote from Billing Invoices Add New Quote.



In the Client's Account, you can add the account with a different currency than the entity currency.

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|----------------------------|---|------------|-------------|-----------------------|
| Save | | | | \$ - |
| Client's Account* | Labbini LLC C EUR | Tax Number | 10000 | |
| | 1 EUR = 1.38 USD | | | |
| Quote Ref | | Bill To | Labbini LLC | |
| | | | | |
| | | | | li li |
| Date* | 2023-09-26 | Terms* | In Advance | ~ |
| Due On* | 2023-09-26 | PO# | | |
| | Notify me before | | | |
| Matters | | | | |
| | Link Matters | | | |
| Quote details | | | C3 | |
| | | | | |

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