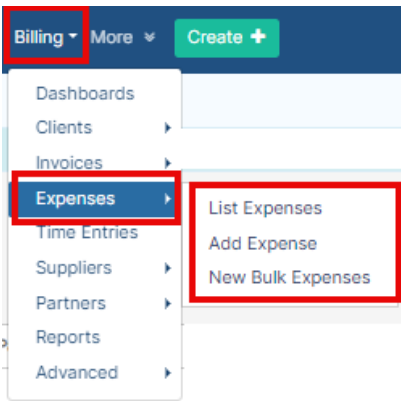# How to Manage Expenses

Objectives

- Record new expense
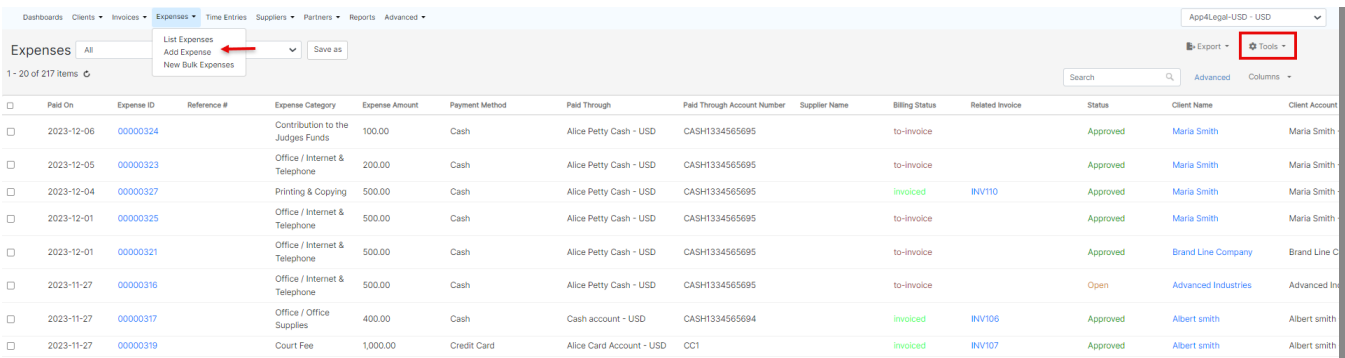- Access and edit all the expenses

Steps

From the Billing Module, you can manage expenses which can be court fees, expert fees, translation, and so on.

To Access it, you can directly click on **Billing Expenses,** and choose the option you need.

To record a new expense click on **Expenses Add Expense.**

> ⓘ You can also record expenses from the **Tools** button in the expenses grid or from the quick **New** button in the main menu.

Fill out the mandatory fields:

- **Expense Category**: Categories default in the Billing Settings.
- **Payment Method**: The method determines the types of accounts that appear accordingly:
    1. **Cash**: Cash Accounts
    2. **Credit Card**: Liability of type Credit Card Accounts
    3. **Cheque & Bank**: Bank Accounts
    4. **Online payment**: Bank Accounts and Credit Card Accounts
    5. **Other**: Cash, Bank, and Credit Card Accounts
- **Paid Through Account:** The Account that appears as per the Payment Method. Accounts can be added on the fly via the Add account hyperlink.
- **Amount**
- **Paid On**: date of the expense payment.

Additional information could be the Tax, Reference number, supplier, comments, or any related documents that could be attached as well.

Expenses could be related to matters, contracts, tasks, or hearings. Therefore you can specify this while adding the expense from the **Expense Allocation** Tab.

Expenses could also be Internal or Client-related. In the case of Client-related Expenses, you have to specify if it will be billable or not and add the client account accordingly.

All the expenses will be then listed in the Expense Grid, simply access it from **Billing Expenses List Expenses** from the navigation menu.

The expenses grid is where you can track and manage all the Expenses recorded, Advance your search, get reports, add bulk expenses, and so on.

All the expenses added can be viewed in the list along with their details, such as amount, status, related client account, and so on.

There are certain actions a user can do from the settings wheel next to an expense (view/edit, change billing status, etc.).

The admin can set an approval process. Therefore, responsible users such as **accountants,** can edit the expense information, approve, review, or cancel an expense before being invoiced.

⚠️ Invoiced and Reimbursed expenses can not be edited or deleted.

ℹ️ Reimbursed Expenses are expenses that are invoiced and the related invoice has been paid

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

Thank you!