

# How to Manage Expenses

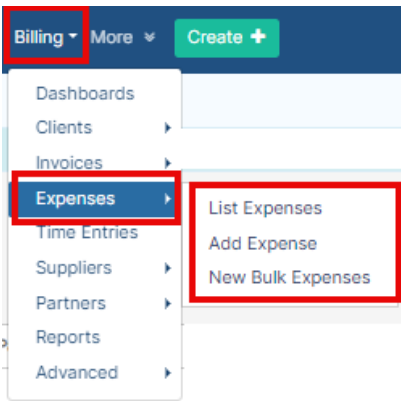
## Objectives

- Record new expense
- Access and edit all the expenses

## Steps

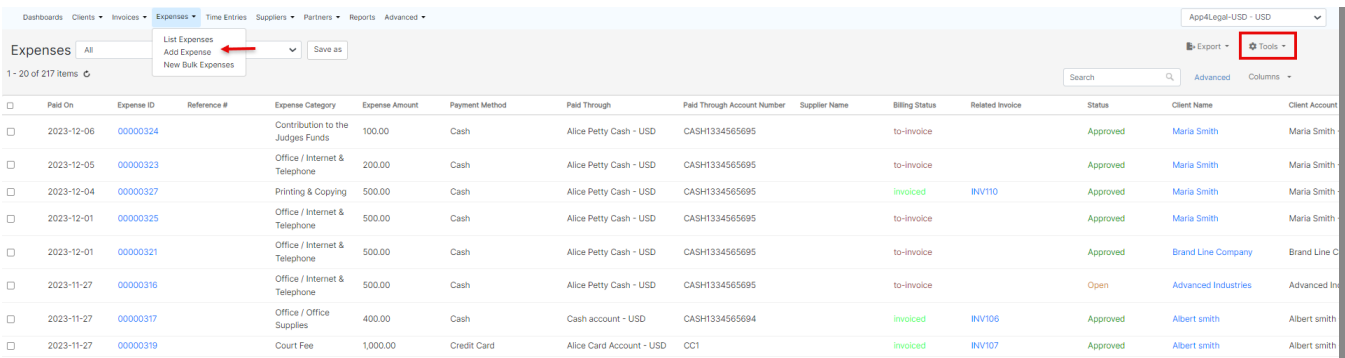
From the Billing Module, you can manage expenses which can be court fees, expert fees, translation, and so on.

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.



Paid On	Expense ID	Reference #	Expense Category	Expense Amount	Payment Method	Paid Through	Paid Through Account Number	Supplier Name	Billing Status	Related Invoice	Status	Client Name	Client Account
2023-12-06	00000324		Contribution to the Judges Funds	100.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Approved	Maria Smith	Maria Smith
2023-12-05	00000323		Office / Internet & Telephone	200.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Approved	Maria Smith	Maria Smith
2023-12-04	00000327		Printing & Copying	500.00	Cash	Alice Petty Cash - USD	CASH1334565695		invoiced	INV100	Approved	Maria Smith	Maria Smith
2023-12-01	00000325		Office / Internet & Telephone	500.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Approved	Maria Smith	Maria Smith
2023-12-01	00000321		Office / Internet & Telephone	500.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Approved	Brand Line Company	Brand Line C
2023-11-27	00000316		Office / Internet & Telephone	500.00	Cash	Alice Petty Cash - USD	CASH1334565695		to-invoice		Open	Advanced Industries	Advanced Inc
2023-11-27	00000317		Office / Office Supplies	400.00	Cash	Cash account - USD	CASH1334565694		invoiced	INV106	Approved	Albert smith	Albert smith
2023-11-27	00000319		Court Fee	1,000.00	Credit Card	Alice Card Account - USD	CC1		invoiced	INV107	Approved	Albert smith	Albert smith

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.

Add New Expense

app4legal

Cancel

Save & Create New

Save

Expense Info
Expense Allocations

Expense Info

Expense Category \*

+ Add Category

select an option

Payment Method \*

select an option

Paid Through \*

+ Add Account

select an option

Balance: 0.00  
Total Expenses Waiting Approval: 0.00

Amount \*

Paid On \*

2024-01-17

Inclusive Tax

select an option

Reference #

Supplier

+ Add Supplier

Start typing

Comments

Attach File

Drag and drop a file here or

Browse

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.

Add New Expense

App4Legal-USD

Cancel

Save & Create New

Save

Expense Info
Expense Allocations

Expense Info

Expense Allocations

Related Matter

M0000215: Advanced Insurance vs Adam Banking Case

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Expense Type

Internal

Client

Billing Status

Not Billable

Billable

Client \*

Advanced Industries

Client Account \*

+ Add Account

Advanced Industries (USD)

×

Related Task

Start typing

Related Hearing

Start typing

Related Event

Start typing

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.

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

App4Legal-USD - USD

Expenses

All

Save as

Export

Tools

1 - 20 of 113 items

Search

Advanced

Columns

<input type="checkbox"/>	Paid On	Expense ID	Reference #	Expense Category	Expense Amount	Payment Method	Paid Through	Paid Through Account Number	Billing Status	Status	Client Name
<input type="checkbox"/>	2023-05-03	00000208		Transportation Fee	100.00	Cash	Cash account - USD	1334565694	invoiced	Approved	BTL Insurance
<input type="checkbox"/>	2023-05-02	00000207		Renewal Fee	100.00	Cash	petty cash Samira - USD	125	to-invoice	Open	Michelle
<input type="checkbox"/>		0000206		Advance of Expert Fee	563.00	Cash	Alice Petty Cash - USD	1334565695	internal	Open	
<input type="checkbox"/>		0000205		Advance of Expert Fee	500.00	Cash	Alice Petty Cash - USD	1334565695	internal	Open	
<input type="checkbox"/>		0000204		Advance of Expert Fee	500.00	Cash	Alice Petty Cash - USD	1334565695	internal	Open	
<input type="checkbox"/>	2023-04-28	00000203		BBA Fee	800.00	Cash	Alice Petty Cash - USD	1334565695	non-billable	Open	Alvah Smith
<input type="checkbox"/>	2023-04-28	00000202		Built Property Tax	500.00	Cash	Cash account - USD	1334565694	internal	Open	
<input type="checkbox"/>	2023-04-28	00000201		Advance of Expert Fee	2,500.00	Cash	Alice Petty Cash - USD	1334565695	to-invoice	Open	Jennifer
<input type="checkbox"/>	2023-04-28	00000200		Transportation Fee / Fuel	100.00	Cash	Cash account - USD	1334565694	to-invoice	Approved	Property
<input type="checkbox"/>	2023-04-27	00000199		Court Fee	1,200.00	Cash	Alice Petty Cash - USD	1334565695	to-invoice	Open	Alvah Smith
<input type="checkbox"/>	2023-04-20	00000198		Transportation Fee	100.00	Cash	petty cash Samira - USD	125	to-invoice	Open	
<input type="checkbox"/>	2023-04-13	00000197		Court Fee	1,000.00	Cash	Cash account - USD	1334565694	reimbursed	Approved	Ind

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.

Dashboards

Clients

Invoices

Expenses

Time Entries

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Partners

Reports

Advanced

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General Info

Attachments

Expense ID: 00000329

Expense Category: Hotel

Payment Method: Cash

Paid Through: Alice Petty Cash (CASH1334565695)

Amount: USD 2,000.00

Comments: (No Data)

Paid On: 2023-12-11

Inclusive Tax: --

Reference #: --

Supplier: --

Status

Billing Status

Client

Client Account

Open

Approved

Open

Cancelled

Needs Revision

Open

to-invoice

Maria Smith

Maria Smith - USD

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Invoiced and Reimbursed expenses can not be edited or deleted.
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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](mailto:help@lexzur.com).

Thank you!