

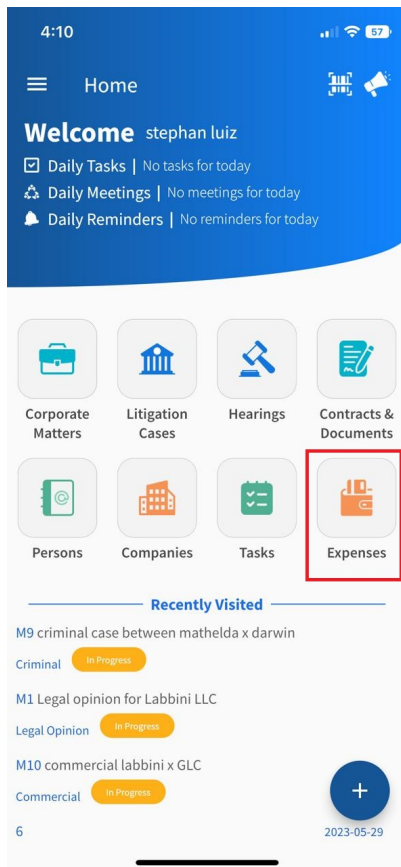
How to Manage Expenses in Mobile App

Objectives

- Manage all your expenses
- Add new expenses

Steps

With the mobile application, it's now easier to check and manage all of your expenses. You can access all of your expenses from the **Expenses** button on the home page of your application.



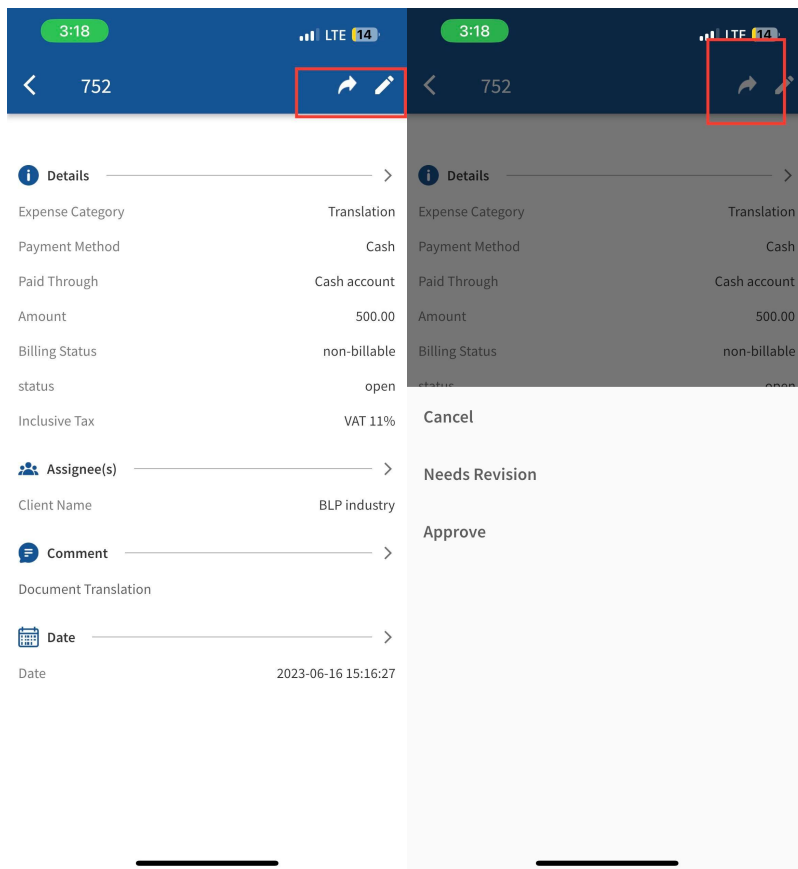
Next, you need to choose the entity you want to check its expenses. All you have to do is to click on the desired entity.

Now, you will be able to check all the expenses related to this entity. You can search for the required expense from the **Search** icon at the top right of the screen.

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< My Expenses			<div> <div></div> <div></div> </div>		
6	stephan luiz				
May 2023	approved	150.00USD			
19	stephan luiz				
Apr 2023	approved	100.00USD			
5	stephan luiz				
Apr 2023	M1: Legal opinion for La... approved	300.00USD			
5	stephan luiz				
Apr 2023	M1: Legal opinion for La... approved	300.00USD			
5	stephan luiz				
Apr 2023	M1: Legal opinion for La... approved	200.00USD			
	stenhan luiz				

Also, when clicking on an expense, you can check its Details, Clients name, Comments, and the Date information.

The actions on the top right allows you to edit or change the expense status such as approve it, move it to needs revision, or cancel it.



Adding New Expense:

To add an expense through your mobile application, all you have to do is to click on the **+** button at the top right of the **My Expenses** page.

My Expenses		
6 May 2023	stephan luiz approved	150.00USD
19 Apr 2023	stephan luiz approved	100.00USD
5 Apr 2023	stephan luiz M1: Legal opinion for La... approved	300.00USD
5 Apr 2023	stephan luiz M1: Legal opinion for La... approved	300.00USD
5 Apr 2023	stephan luiz M1: Legal opinion for La... approved	200.00USD
	stenhan luiz	

Fill out the following mandatory fields:

- **Expense Category:** choose from a list of customized categories such as court fees, expert fees, office supplies, and so on.
- **Payment Method:** This determines the types of accounts that appear accordingly, such as Cash Accounts, Credit cards, Bank Accounts, and so on.
- **Paid Through Account:** The Accounts that appear as per the Payment Method selected. Accounts can be also added on the fly. You can add different types of accounts including Cash, Bank, and Credit Cards, and add the necessary account details.
- Add the **Amount** to be paid
- And specify the **date** by which the payment should be received.

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Record Expense
SAVE

Expense Category*

Payment Method*
Cash

Paid Through*
petty cash - USD (123)
Add Account

Amount*

Paid on*
2023-06-01

Comment

Inclusive Tax

You can link this expense to matters, tasks, and hearings, as well as specify if it's an internal expense or recorded on a client account.

However, client-related expenses may be billable or nonbillable, so be sure to indicate accordingly, and attach any related documents to the expense as well.

Record Expense
SAVE

Inclusive Tax

Supplier

Reference#

Related Matter
legal advice on service agreement

☒ Client
☐ Internal

Client Name
Alvah Scott

☒ Billable
☐ Non billable

Client Account
Alvah Scott - USD (CL34)
Add Account

Save and create another
☐

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

Thank you!