How to Manage Clients in LEXZUR

Objectives

- Manage Clients
- Add new Client

Steps

You can manage clients easily in LEXZUR. First, you can access the list of all your clients under the **Contacts Module** from the navigation menu

Clients can be either companies or persons, and the grid view provides a detailed list of clients along with their essential information. You can easily search and filter clients to quickly find the specific ones you need. Moreover, the option to export the client list to Excel streamlines data management.

You can also add new clients directly from the same page. Click on the **"+"** on the top right of the page. Specify whether this client is a company or person and fill out the required fields accordingly.

Add Client   ✕

Company   ○ Person   ←

Name*   [   ]

Nickname*   [   ]

Sub-category   None

City   [   ]

Country   None

Website   [   ]

Mobile   [   ]

Phone   [   ]

Email   [   ]

Use semicolons separator (;) to add multiple emails: for ex. john@gmail.com;john@live.com

[Save]   Cancel

For further modifications and access to detailed information about a particular client, simply click on their ID to navigate to their dedicated page.

Here, you have the ability to track and manage all client details, including general information, related documents, and reminders.

Additionally, on the client's dedicated page, you can view a comprehensive overview of their expenses, time entries, related bills, invoices, trust deposits, and partners' shares. This feature allows you to stay informed and in control of all financial aspects related to each client.

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

Thank you!