

How to Manage Journals

Objectives:

- Manage Journals

Steps:

LEXZUR's Billing module allows you to manage your journals.

To access the list of journals, click on **"Advanced"** **"View Journals"**.

DashboardsClientsInvoicesExpensesTime EntriesSuppliersPartnersReportsAdvancedMy instance-E-invoice - SAR

Manual JournalsAdvanced Search

Manual JournalsView JournalsNew Journal

Money TransferDescription123James Marvin2023-05-03James Marvin2023-05-03

Chart of AccountsJournalJames Marvin2023-03-06James Marvin2023-03-06

Bank ReconciliationsjournalJames Marvin2023-03-06James Marvin2023-03-06

SettingsjournalJames Marvin2023-02-17James Marvin2023-02-17

Set Content LanguageEnglishFrançaisالعربية

Journal#	External Ref. #	Date	Created By	Created On	Modified By	Modified On
0000028		2023-05-03	James Marvin	2023-05-03	James Marvin	2023-05-03
0000024		2023-03-06	James Marvin	2023-03-06	James Marvin	2023-03-06
0000023		2023-03-06	James Marvin	2023-03-06	James Marvin	2023-03-06
0000021		2023-02-17	James Marvin	2023-02-17	James Marvin	2023-02-17
0000001		2022-05-26	Carolina Robinson	2022-05-26	Carolina Robinson	2022-05-26

Via the action wheel next to the Journal, the user can Print, View/Edit, Clone, or Delete a Journal.

Manual JournalsAdvanced Search

PrintView / EditCloneDelete

Journal#	External Ref. #	Date	Amount (SAR)	Description	Created By	Created On	Modified By	Modified On
0000028		2023-05-03	1000.00	123	James Marvin	2023-05-03	James Marvin	2023-05-03
		2023-03-06	1000.00	Journal	James Marvin	2023-03-06	James Marvin	2023-03-06
		2023-03-06	2000.00	journal	James Marvin	2023-03-06	James Marvin	2023-03-06
		2023-02-17	10000.00	journal	James Marvin	2023-02-17	James Marvin	2023-02-17
		2022-05-26	100000.00		Carolina Robinson	2022-05-26	Carolina Robinson	2022-05-26

In **Advanced Search**, the user can run the search based on a specific entity relevant to the Journal form, i.e. Journal ID, date, Amount, and more.

There is a possibility also to modify the operator of the search for each field (i.e. equal, not equal, start with, contains, >, <, and more). The Advanced Search menu is hidden by default; the user needs to click on the link Advanced Search to unhide it.

Search Journals Filters

Journal IDEqualReferencecontains

AmountEqualDateEqualYYYY-MM-DD

Created BycontainsStart typingCreated OnEqualYYYY-MM-DD

Modified BycontainsStart typingModified OnEqualYYYY-MM-DD

Descriptioncontains

ResetSubmit[Hide]

Manual JournalsAdvanced Search

Actions

Moreover, you can export your journals to Excel from the **Actions** button.

Manual Journals

[Advanced Search](#)

Actions

New Journal
Export to Excel

Journal#	External Ref. #	Date	Amount (SAR)	Description	Created By	Created On	Modified By	Modified On
0000028		2023-05-03	1000.00	123	James Marven	2023-05-03	James Marven	2023-05-03
0000024		2023-03-06	1000.00	Journal	James Marven	2023-03-06	James Marven	2023-03-06
0000023		2023-03-06	2000.00	journal	James Marven	2023-03-06	James Marven	2023-03-06
0000021		2023-02-17	10000.00	journal	James Marven	2023-02-17	James Marven	2023-02-17
0000001		2022-05-26	100000.00		Carolina Robinson	2022-05-26	Carolina Robinson	2022-05-26

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

Thank you!