

How to Manage Partners Accounts

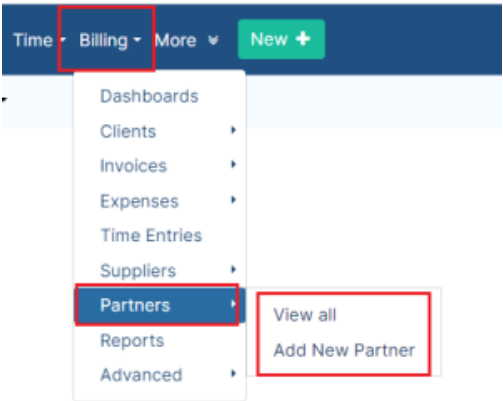
Objectives

- Add Partner's Accounts
- Manage the account financials

Steps

Managing partner accounts within the billing module is a straightforward process designed to ensure efficient financial transactions.

Begin by accessing partners through the navigation menu: **Billing Partners View all**



From this page you can see the list of your partners with their accounts details.

Dashboards Clients Invoices Expenses Time Entries Suppliers Partners Reports Advanced				App4Legal-USD - USD	
Partners		Search	Advanced Search	Actions	
Partner Name	Partner Type	Is Third Party?		Add New Partner	
LLP Services	Company	No		Export to Excel	
ABC Services	Company	No			
Peter Legal	Company	No			
Alberto Scott	Person	No			
Common Law	Company	No			
BLP Industry	Company	No			

To add a new partner you can either do it from the **Actions** in this page or directly from the **Billing** drop-down list from the navigation menu.

Two essential fields are required "Partner Name" and "Account Number".

Partners in LEXZUR can take the form of companies or individual contacts. Therefore search for an existing contact or add a new one on the fly.

The flexibility extends to the account number prefix, which can be added or edited conveniently from the billing settings.

Add New Partner

Partner Name*

Company / Group

Start typing

☐ Is Third Party?

Account Number*

PAR 9

Account Currency

USD

Account Description

Save

A Partner in LEXZUR can have several accounts in different currencies. In order to manage Partner Accounts, go to the Partner grid and click on the Partner Name. A table of all the available accounts is displayed. You can add a New Account from the button on the top right.

Dashboards Clients Invoices Expenses Time Entries Suppliers Partners Reports Advanced

App4Legal-USD - USD

Audit

Related Accounts

New Account

Name	Balance Due	Currency	Description
Common Law (PAR6)	-4,116.50	USD	
<div><div></div>Common Law (PAR8)</div>	0.00	AED	

Zoom In

Settlement Of Partner Account

Export Statement

Edit Account

Delete Account



A new account can also be added from the action wheel next to each partner from the Partners Grid

To add a new account, simply specify the account name, number, and choose the currency.

New Account for "Common Law"

Add New Account

Account Name*

Common Law

Account Number*

8

Currency*

AED

Description

☒ Is visible in the Advisor Portal

Save Cancel

You can also manage the visibility of these accounts in the Advisor Portal.

The action wheel next to the Partner accounts allows you to:

- **Zoom In:** This displays all the transactions of the selected account filtered by date

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

App4Legal-USD - USD

From Date

>=

2023-01-01

To Date

<=

2024-01-01

Submit

Transactions of Common Law - USD (PAR6)

Date	Description	Type	Debit	Credit
2023-08-02	Partners Shares - INV0000099	INV		40.00
2023-08-02	Partners Shares - INV0000099	INV		20.00
2023-08-02	Partners Shares - INV0000099	INV		20.00
2023-06-20	CRD0000003 - Partners Shares	CRN	50.00	
2023-06-08	Partners Shares - INV0000088	INV		30.00
2023-06-08	Partners Shares - INV0000088	INV		50.00
2023-05-26	Partners Shares - INV0000084	INV		50.00
2023-05-26	Partners Shares - INV0000084	INV		10.00
2023-05-26	Partners Shares - INV0000084	INV		50.00
2023-05-26	Partners Shares - INV0000084	INV		50.00
2023-04-20	Partners Shares - INV0000071	INV		50.00
2023-04-13	Partners Shares - INV0000070	INV		28.00
2023-04-13	Partners Shares - INV0000070	INV		20.00
2023-04-12	Partners Shares - INV0000068	INV		53.50

- **Create a Settlement of Partner Account**

Settlement Of Partner Account

Paid Through*

Choose Account

Amount*

4116.5

Paid On*

2023-08-09

Comments

Settlement Of Partner Account

Save

Cancel

- **Export the Statement of this Account**

Export Partner Statement

Partner Statement Templates*
partner's template

From Date
2023-01-01

To Date
2023-08-09

Run

<input checked="" type="checkbox"/>	Invoice Number	Date	Status
<input checked="" type="checkbox"/>	INV0000044	2023-02-07	partially paid
<input checked="" type="checkbox"/>	INV0000047	2023-02-10	partially paid
<input checked="" type="checkbox"/>	INV0000051	2023-02-15	partially paid
<input checked="" type="checkbox"/>	INV0000053	2023-02-01	partially paid
<input checked="" type="checkbox"/>	INV0000019	2023-03-06	open
<input checked="" type="checkbox"/>	INV0000056	2023-03-09	partially paid
<input checked="" type="checkbox"/>	INV0000061	2023-03-21	paid
<input checked="" type="checkbox"/>	INV0000025	2023-03-30	partially paid
<input checked="" type="checkbox"/>	INV0000062	2023-03-31	paid
<input checked="" type="checkbox"/>	INV0000026	2023-03-31	paid
<input checked="" type="checkbox"/>	INV0000065	2023-04-05	cancelled
<input checked="" type="checkbox"/>	INV0000068	2023-04-12	open
<input checked="" type="checkbox"/>	INV0000070	2023-04-13	paid
<input checked="" type="checkbox"/>	INV0000064	2023-04-05	draft



- Edit or Delete the Account

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

Thank you!