

# How to transfer money from an account to other?

## Objectives

- Transfer money between accounts

## Steps

From the main menu of the application, and upon clicking on **Billing**, go to **advanced** and click on **Money Transfer**.

The screenshot displays the LEXZUR application interface. The top navigation bar includes the LEXZUR logo and a series of menu items: Dashboards, Agile, Contacts, Matters, Tasks, Contracts & Documents, Reports, Time, Billing, and More. The 'Billing' menu is highlighted with a red box. Below the navigation bar, the 'Money Transfer' form is visible, featuring fields for 'From' (Choose Account), 'To' (Choose Account), 'Amount' (?), 'Date' (2023-12-03), 'External Ref. #' (External Ref. #), 'Description' (Description), and 'Document' (Choose File). A red arrow points to the 'Money Transfer' option in the 'Billing' menu. The bottom of the interface shows a 'Save' button and a user profile icon.

There are 4 mandatory fields that need to be filled:

- **From:** Select the account you want to transfer the money from.
- **To:** Select the account you want to transfer the money to.
- **Amount:** Select the amount that needs to be transferred.
- **Description**

Dashboards

Clients ▾

Invoices ▾

Expenses ▾

Time Entries

Suppliers ▾

Partners ▾

Reports

Advanced ▾

Money Transfer

From

+ Add New Account

Choose Account

⌵

To

+ Add New Account

Choose Account

⌵

Amount

?

Amount: 0.00 USD

Date

2023-12-03

📅

External Ref. #

External Ref. #

Description

Description

✎

Document

Choose File

No file chosen

Also, you can add new accounts directly from the **Add New Account** hyperlinks.

Dashboards

Clients ▾

Invoices ▾

Expenses ▾

Time Entries

Suppliers ▾

Partners ▾

Reports

Advanced ▾

Money Transfer

+ Add New Account

Choose Account

⌵

+ Add New Account

Choose Account

⌵

Amount

?

Amount: 0.00 USD

Date

2023-12-03

📅

External Ref. #

External Ref. #

Description

Description

✎

Document

Choose File

No file chosen

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!