

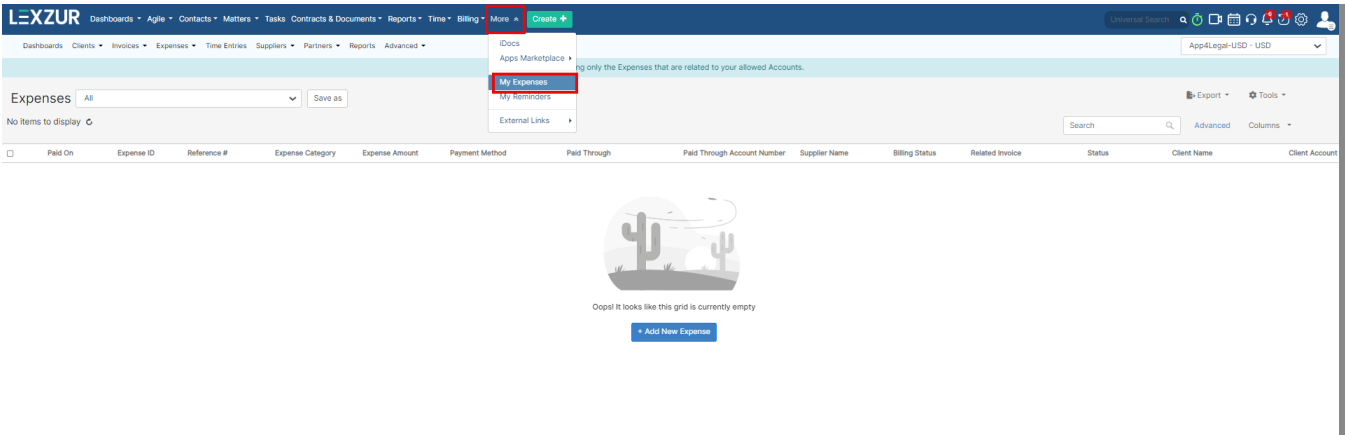
How to log an Expense from my Petty Cash?

Objectives

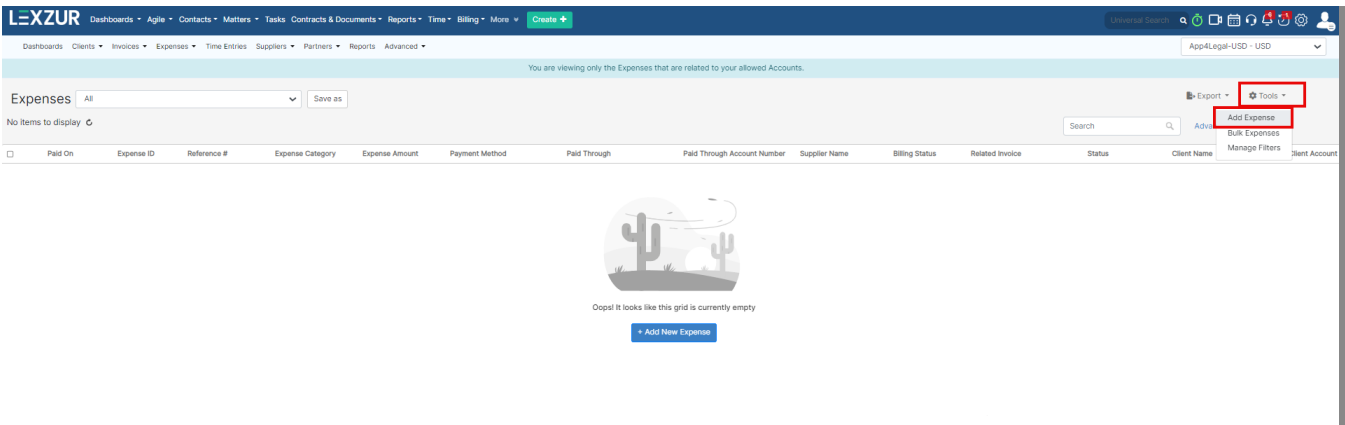
- Record expenses using my petty cash

Steps

To access the list of your expenses, simply click on **More** near the Create button, then **My Expenses**.



From "My Expenses", you can view the expenses related to your allowed accounts, and you can record any new Expenses from the Tools button.



You can add expenses anytime from the **Create** button in the main menu as well.

Create +

Company

Person

Corporate Matter

Litigation Case

Hearing

Matter Container

Contract/Document from Template

Upload Contract/Document

Intellectual Property

Task

Time entry

Expense

Invoice

Meeting

Reminder

To create a new expense from your petty cash, fill out the mandatory fields,

- **Expense Category:** the category of the expenses
- **Payment Method:** how this expense is paid
- **Paid Through:** the account you use for payment, here you can add your **Petty Cash Account**
- **Amount:** the amount paid
- **Paid On:** the date of the payment.

To know more about how to create Petty Cash Accounts for team members. Click [here](#).

Add New Expense

App4legal

X Cancel

Save & Create New

Save

Expense Info

Expense Allocations

Expense Info

Expense Category *

Travel / Hotel

+ Add Category

X

Payment Method *

Cash

X

Paid Through *

Petty Cash Account - USD (13)

+ Add Account

X

Balance: USD 0.00

Total Expenses Waiting Approval: USD 0.00

Amount *

5,000

USD

Paid On *

2024-01-26

Inclusive Tax

select an option

Reference #

Supplier

Start typing

+ Add Supplier



To know more about managing expenses, click [here](#).

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

Thank you!