

How to Create Petty Cash Accounts for the Team Members?

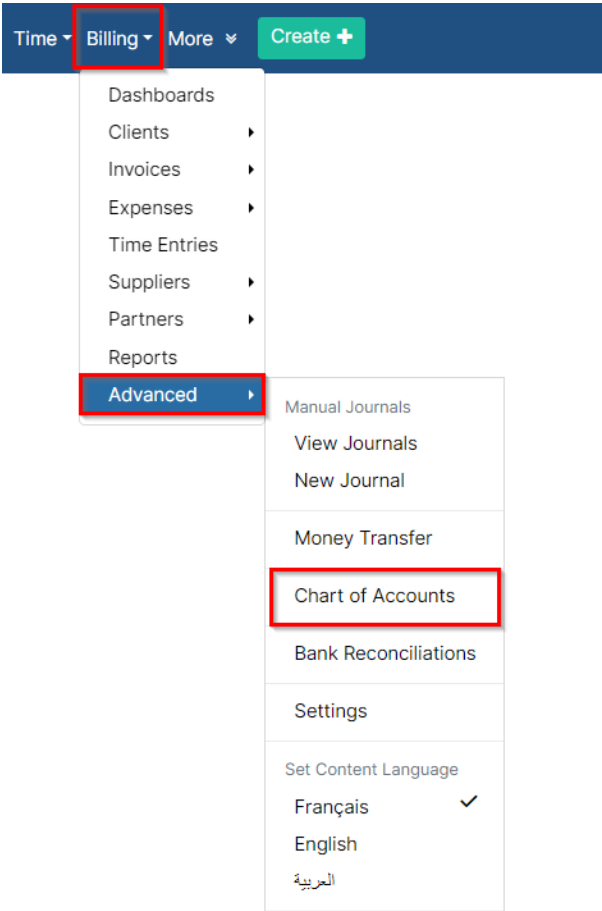
Objectives

- Create team members' accounts

Steps

In LEXZUR, you can create accounts for every team member from the Billing Module.

Therefore, from the main menu, click on **Billing Advanced Chart or Accounts**.



This page lists all your accounts with their details, such as their types, balance, currency, and so on.

To add a new account, click on the **Tools** action, then "Add Account".

A screenshot of the 'Accounts' page in LEXZUR. The page has a light blue header with navigation links: Dashboards, Clients, Invoices, Expenses, Time Entries, Suppliers, Partners, Reports, and Advanced. The 'Accounts' section is active, showing a table of accounts. The table has columns: Account Name (English), Account Number, Account Type, Currency, Balance, and System Account. The table lists 11 accounts, including 'Advertising & Marketing', 'Advisor Expenses', 'All Bank Account', 'Alice Card Account', 'Alice Petty Cash', 'bank account 12342', 'BBC Bank Account', 'Car & Taxi', 'Cash account', and 'Cash LBP'. A 'Tools' dropdown menu is open in the top right corner, showing options: 'Add Account', 'Manage Filters', 'List Client Accounts', 'List Supplier Accounts', and 'List Partner Accounts'. The 'Add Account' option is highlighted with a red box and an arrow.

Fill out the required fields:

1. **Account Name:** The name of the new account.

2. **Account Type:** The type of the account in the system (it can be asset, Expense, Liability, Equity, or Income)
3. **Account Number**
4. **Currency**

[Settings](#) / [Chart of Accounts](#) / Add New Account

Add New Account

Account Name (English)*

Alice Petty Cash

Account Name (Français)

Account Name (Français)

Account Name (العربية)

Account Name (العربية)

Account Type*

Bank

Account Number*

1234592

Currency*

USD

Description (English)

> More Fields

☒ Show in dashboard

☐ Is visible in the Advisor Portal

☒ Visible to all users

☐ Save and Create Another

Save



You can decide if you want to show the created account in the dashboard, make it visible to all users, and in the Advisor Portal.

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

Thank you!