

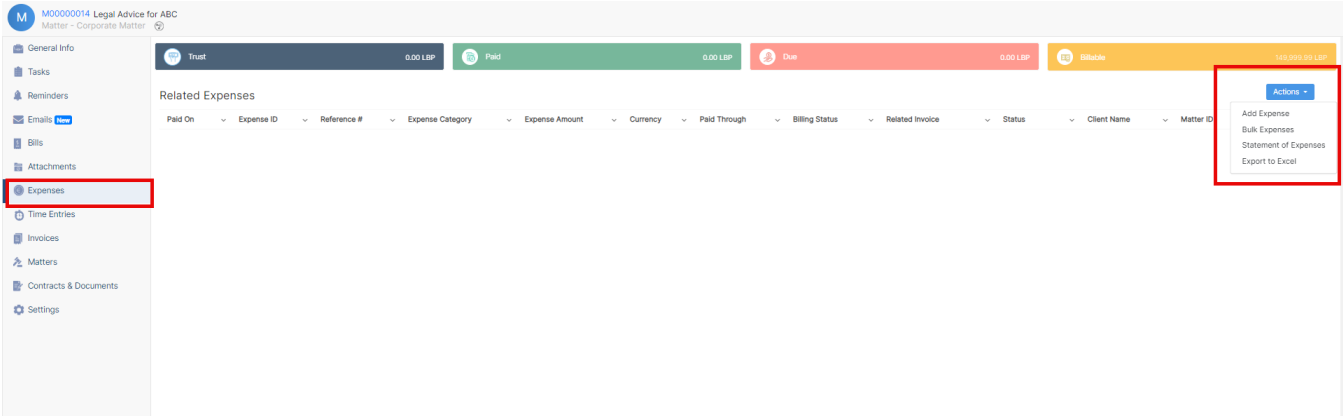
How to Record Expenses on Corporate Matters

Objectives

- Record expenses related to matters
- Add Bulk Expenses

Steps

To add a new expense, you can either choose "Expense" from the quick **Create** button or from the separate Expenses Tab on the matter page. Therefore, open the Matters page, then navigate to the **Expenses** tab, and click on the **Actions** button to record a new related expense or bulk expenses.



Fill out the following mandatory fields:

- **Expense Category:** choose from a list of customized categories such as court fees, expert fees, office supplies, and so on.
- **Payment Method:** This determines the types of accounts that appear accordingly, such as Cash Accounts, Credit cards, Bank Accounts, and so on.
- **Paid Through Account:** The Accounts that appear as per the Payment Method selected. Accounts can be also added on the fly. You can add different types of accounts including Cash, Bank, and Credit Cards, and add the necessary account details.
- Add the **Amount** to be paid
- And specify the **Date** by which the payment should be received.

Add New Expense

App4legal

Cancel

Save & Create New

Save

Expense Info

Expense Allocations

Expense Info

Expense Category *

Appeal Fee

+ Add Category

Payment Method *

Cash

X

Paid Through *

Cash Account - USD (12)

+ Add Account

Balance: USD 0.00

Total Expenses Waiting Approval: USD 0.00

Amount *

1,000

USD

Paid On *

2024-01-26

Calendar icon

Inclusive Tax

select an option

Dropdown arrow

Reference #

Supplier

Start typing

+ Add Supplier

Comments

Attach File

Drag and drop a file here or Browse

Add New Expense

App4legal

Cancel

Save & Create New

Save

Expense Info

Expense Allocations

Expense Info

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Expense Allocations

Additionally, you can link this expense to matters, tasks, and hearings, as well as specify if it's an internal expense or recorded on a client account.

However, client-related expenses may be billable or nonbillable, so be sure to indicate accordingly, and attach any related documents to the expense as well.

To add **Bulk Expenses** click on **Action Bulk Expenses** from the Matter's expenses page.

Add New Expenses

Payment Method *

Cash

Paid Through *

Cash Account - USD (12)

Balance

0.00 USD

Total Expenses Waiting Approval

0.00 USD

1 USD = 1 USD

Related Matter

00000014

Legal Advice for ABC

Relate to

Task

Internal

Client

soheir kim

Non-Billable

Billable

Expenses Details

Expenses

Expense Category *

Amount *

Inclusive Tax

Reference#

Paid On *

Supplier

Supplier Tax Number

Description

Upload Document

Advance of Expert Fee

USD 1000

2024-01-26

Search

Choose File

No file chosen

Claim Fee

USD 200

2024-01-24

Search

Choose File

No file chosen

Sub Total (USD)

1,200.00

Total (Tax) (USD)

0.00

Total (USD)

1,200.00

Add another item

Save

Select the **payment method** and the **account** through which the payment is made. Additionally, you can associate them with matters, tasks, or hearings, specifying whether they are internal or client-related, and choose the billable type.

In the **Expense details** section, enter the expense items on separate lines. Provide the category, amount, tax information, paid-on date, and other relevant details.

Once you record all the expenses related to a Corporate Matter or a Litigation Case, you can preview them in the grid.

Also, you have the option to view the statement of expense report and export them into a spreadsheet for other reporting purposes.

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

Thank you!