

Management Reports List

Accounting Reports

General Ledger Detail Backup By Account
 General Ledger Report - By Account
 General Ledger Report - By Account By Date
 General Ledger Report - By Account By Month

4 Accounting Reports

Billing | WIP | Summary Reports

Aged Work In Process By Client
 Aged Work In Process By Client By Staff
 Aged Work In Process By Client Number
 Aged Work In Process By Client Number By Staff
 Aged Work In Process By Client Number By Staff
 Aged Work In Process By Matter Number
 Aged Work In Process By Matter Ref
 Aged Work In Process By Responsible By Client
 Aged Work In Process By Staff By Client
 Aged Work In Process By Staff By Client Number
 Aged Work In Process By Staff By Matter Ref
 Billed With % Collected By Client
 Billed With % Collected By Invoice
 Billed With % Collected By Matter Code
 Billed With % Collected By Matter Ref
 Billed With % Collected By Month
 Billed With % Collected By Responsible By Matter Code
 Billed With % Collected By Responsible By Matter Ref
 Billed With % Collected By Responsible By Month
 Billed With % Collected By Staff (Summary)
 Billing History By Client
 Billing History By Client No
 Billing History By Matter No
 Billing History By Matter Ref
 Billing Records By Responsible By Month Invoiced
 Billing Records By Responsible By Staff By Month Invoiced
 Billing Records By Staff By Month Invoiced
 Billing Records Paid/Unpaid By Client
 Billing Records Paid/Unpaid By Matter Ref
 Billing Records Paid/Unpaid By Staff
 Fees Billable | Received By Originating
 Fees/Costs Billed With % Collected (Detail)
 Hours Entered | Billed | Collected By Staff
 Matter Over-View Report - By Matter Number
 Matter Over-View Report - By Matter Reference

Management Reports List

Matter Over-View Report - By Originating Attorney
Matter Over-View Report - By Responsible Attorney
Matter Slip History Report - By Matter Number
Matter Slip History Report - By Matter Reference
Monthly Billing Trend By Client
Monthly Billing Trend By Client By Matter Ref
Monthly Billing Trend By Client By Staff
Monthly Billing Trend By Matter No
Monthly Billing Trend By Matter Ref
Monthly Billing Trend By Responsible
Monthly Billing Trend By Responsible By Matter Ref
Monthly Billing Trend By Responsible By Staff
Monthly Billing Trend By Staff
Monthly Billing Trend By Staff By Bill Code
Monthly Billing Trend By Staff By Client
Monthly Billing Trend By Staff By Client No
Payment Listing By Originating By Client No
Pre-Bill Report (Portrait)
Pre-Bill Report (Portrait) - By Matter By Phase By T/E
Pre-Bill Report (Portrait) - By Matter By T/E By Phase
WIP By Client By Staff
WIP By Staff
Work In Process By Responsible By Client
Work in Process By Staff By Matter Number
Work In Process Summary By Originating Attorney

60 Billing | WIP | Summary Reports

Calendar Reports

Calendar - Text + 12-Month Graphic
Six Week Calendar (Print)
Six Week Calendar (Screen)

3 Calendar Reports

Client Specific Reports

Budget Hrs/Rev vs. Actual Hrs/Rev By Staff By Week
Collections W/ Special Originating Allocation
Firm Rev vs. Coll and Booked vs. Target By Week
Flat Fee Matters Variance Analysis
Matters With Last Three Notes
Productivity By Matter Code
Productivity By Matter Code By Matter Ref
Productivity By Matter Code By Matter Ref By Invoice
Profit / (Loss) By Client By Staff (Detail)
Profit / (Loss) By Client By Staff (Summary)
Profit / (Loss) By Matter Code
Profit / (Loss) By Matter Ref By Staff (Detail)
Profit / (Loss) By Matter Ref By Staff (Summary)

Management Reports List

Retainer Applied Report (Detail) By Matter No
Retainer Applied Report (Detail) By Matter Ref
Retainer Applied Report (Summary) By Matter No
Retainer Applied Report (Summary) By Matter Ref
Revenue Sharing By Staff By Matter (Detail)
Revenue Sharing By Staff By Matter (Summary)

19 Client Specific Reports

Invoice | Receivables Reports

Cash Flow Projection Worksheet By Client
Cash Flow Projection Worksheet By Client Number
Cash Flow Projection Worksheet By Matter No
Cash Flow Projection Worksheet By Matter Ref
Cash Flow Projection Worksheet By RA By Client
Cash Flow Projection Worksheet By RA By Client Number
Invoice History By Client By Invoice
Invoice History By Client By Invoice
Invoice History By Invoice
Invoice History By Matter Ref
Invoice History By Matter Ref By Invoice
Invoice History By Originating
Invoice History By Originating By Client By Invoice
Invoice History By Originating By Invoice
Invoice History By Originating By Matter Ref
Invoice History By Originating By Matter Ref By Invoice
Invoice History By Responsible
Invoice History By Responsible By Client By Invoice
Invoice History By Responsible By Invoice
Invoice History By Responsible By Matter Ref
Invoice History By Responsible By Matter Ref By Invoice
Invoice Listing By Month By Matter No
Invoice Listing By Month By Matter Ref
Invoice Payment Distribution By Matter
Invoice Payment Listing With Memo
Open Invoice Listing By Matter
Open Invoice Listing By Originating By Matter
Open Invoice Listing By Responsible By Matter
Prior Period Aged A/R W/ Future Activity (Detail)
Prior Period Aged A/R W/ Future Activity (Summry)
Prior Period Aged A/R By Matter Ref
Prior Period Aged A/R By Responsible By Matter Ref
Prior Period Aged AR By Responsible By Client No
Recap of Open Invoice Analysis By Client
Recap of Open Invoice Analysis By Matter Ref
Recap of Open Invoice Analysis By Originating
Recap of Open Invoice Analysis by Responsible By Matter
Simple Aged AR By Client Name

Management Reports List

Simple Aged AR By Client Number
Simple Aged AR By Matter Ref
Simple Aged AR By Originating By Client Number
Simple Aged AR By Originating By Matter Ref
Simple Aged AR By Responsible By Client Number
Simple Aged AR By Responsible By Highest \$
Simple Aged AR By Responsible By Matter Ref

45 Invoice | Receivables Reports

Productivity | Budget Variance Reports

Chargeability Analysis By Staff
Client Fee Analysis By Staff
Graphical Productivity By Staff - Monthly
Monthly Productivity Trend By Client
Monthly Productivity Trend By Staff
Monthly Productivity Trend By Staff By Client
Monthly Productivity Trend By Staff By Matter Ref
Overhead Variance
Overhead Variance By Maatter Code By Staff
Overhead Variance By Matter Ref By Staff
Overhead Variance By Staff
Phase Budget Variance By Matter Ref By Phase
Phase Budget Variance By Responsible By Matter Ref By Phase
Productivity By Invoice W/ Fees/Costs Billed/Collected
Productivity By Matter Code By Matter RefW/ Fees/Costs Billed/C
Productivity By Matter Code W/ Fees/Costs Billed/Collected
Productivity By RA By Matter Code W/ Fees/Costs Billed/Collecte
Productivity By Staff W/ Fees/Costs Billed/Collected
Productivity By Staff W/ Fees/Costs Billed/Collected
Productivity By Staff W/ Fees/Costs Billed/Collected
Productivity By Staff W/ Fees/Costs Billed/Collected
Productivity By Staff W/ Fees/Costs Billed/Collected
Productivity By Staff W/ Fees/Costs Billed/Collected
Productivity Summary By Matter Ref
Productivity Summary By Staff By Matter Ref
Profitability Report By Staff
Recap - Value of Time Entered vs. Collections by Staff
Staff Fee Analysis By Client
Staff Fee Analysis By Matter
Staff Hours and Fees Recap Report - By Month
Staff Hours and Fees Recap Report - By Staff (Detail)
Staff Hours and Fees Recap Report - By Staff (Summary)
Staff Hours and Fees Recap Report - By Staff By Month
Staff Hours By Day (Calendar Format)
Staff Hours By Day (Calendar with Weekly Summary)
Staff Hours By Staff By Day
Staff Time Analysis By Client
Staff Time Analysis By Matter No

Management Reports List

Staff Time Analysis By Matter Ref
Time Analysis By Staff
Value of Time Entered Trend By Responsible By Month
Value of Time Entered Trend By Responsible By Staff By Month
Value of Time Entered Trend By Staff By Bill Code
Value of Time Entered Trend By Staff By Month

43 Productivity | Budget Variance Reports

Receipt Allocation | Transaction Reports

Fee Receipt Allocation By Date (Specified %)
Fee Receipt Allocation By Originating (Specified %)
Fee Receipt Allocation By Originating By Matter Ref (Specified %)
Fee Receipt Allocation By Originating By Matter Ref By Staff (Spe
Fee Receipt Allocation By Staff (Specified %)
Fee Receipt Allocation By Staff By Matter Ref (Specified %)
Fees For Staff By Originating
Fees For Staff By Originating By Staff
Fees For Staff By Other
Fees For Staff By Referring
Fees For Staff By Responsible
Fees For Staff With Subtotals By Originating By Matter Ref
Fees For Staff With Subtotals By Responsible By Matter Ref
Fees For Staff With Subtotals By Staff By Matter Ref
Fees For Staff With Subtotals By Staff By Originating
Financial History (Matter)
Funds Acitivity W/ Balance Forward
Funds Activity (Matter)
Funds Balance By Trust Account By Matter
Payment Listing By Client No
Payment Listing By Date
Payment Listing By Date By Mat Ref
Payment Listing By Mat Ref By Date
Payment Listing By Matter Code
Payment Listing By Month
Payment Listing By Originating
Payment Listing By Originating By Matter Code
Payment Listing By Originating By Matter Ref
Payment Listing By Originating By Month By Matter Ref
Payment Listing By Responsible By Client No
Pro Rata Collections By Client
Pro Rata Collections By Client By Matter Ref
Pro Rata Collections By Client By Responsible
Pro Rata Collections By Client By Staff
Pro Rata Collections By Client Code
Pro Rata Collections By Matter Code
Pro Rata Collections By Matter Ref
Pro Rata Collections By Matter Ref By Staff

Management Reports List

Pro Rata Collections By Originating
Pro Rata Collections By Originating By Staff
Pro Rata Collections By Responsible
Pro Rata Collections Detail By Client Code By Matter Ref
Pro Rata Collections Summary By Client Code By Matter Ref
Staff Collections W/ Pro Rata Fee Allocation (Detail)
Staff Collections W/ Pro Rata Fee Allocation (Summary)
Transaction Listing By Date
Transaction Listing By Matter Ref By Invoice
Transaction Listing By Responsible By Client Number
Transaction Listing By Type By Date

49 Receipt Allocation | Transaction Reports

223 Total Reports