

Client/Matter - Client Listing Report

Purpose: To display and print all clients with and without their matters. You can choose to include Closed Clients.

Sort: From the drop down menu, select sort by Client Name, Client ID, Open Date.

Include Matters: Select if you want to include matters.

Include Closed Clients: Select if you want to include closed files.

Click on Display Report (top of these selection criteria).

Printing Reports: All reports display in PDF and can be printed like any PDF.

Searching Reports: You can search report by entering Ctrl F and entering your search word in the search box (for Macs use Command F).

End updated 2/5/17