

Log - Invoice Report

Like all reports, we suggest you experiment with selection criteria and running the reports. You can't hurt anything.

Purpose: An Invoice Report is a report that displays and prints total fee and cost charges with or without fee/cost credits for a single matter for a client regardless of how many matters are open for the client. If you want to run the Invoice Report for all matters, you will do them one matter at a time. This report is usually requested by insurance companies for matters assigned to your office.

Options: To be printed for the calendar year to the date you select. Default: current date.

Report Contains: Client's Name and Address | Client's ID | Matter Name | Invoice Number | Start Date for transactions on report | End Date for transactions on report | Total Charges on report | whether fee/cost credits are included | Itemized Hours and Fees with Sub-Totals | Optional Summary of Hours Rates and Fees by Timekeeper | Itemized Costs with Sub-Total | Total Hours | Total Fees | Total Costs.

Running Report:

Status: These are the transactions that will appear on the Invoice. The default is both billed and unbilled transactions. Use the down arrow menu to select Unbilled (only) or Billed (only).

Invoice Date: The default is the current date. Use the down arrow to select another date or type the date in the box.

Start Date: This is the start date of the transactions which will appear on the Invoice Report. Use the down arrow to select another date or type the date in the box.

End Date: This is the end date of the transactions which will appear on the Invoice Report. Use the down arrow to select another date or type the date in the box.

Client: Use the down arrow to select the correct client.

Matters: Use the down arrow to select the correct matter.

Credits: Uncheck if you want to include Fee and Cost credits.

Type: Uncheck Costs if you want to include only Fees. Uncheck Fees if you want to include only Costs.

TK Summary: Check if you want to include a summary of Each Timekeepers hour, rates and fees.

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 in PDF report by entering Ctrl F and entering your search word in the search box (for Macs use Command F).

End 2/11/16