

Revenue By Practice Area

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

Purpose: To display and print Calendar Year To Date Revenue (payments) received by Practice Area. The Practice Areas your office has established. You enter Practice Areas in Settings/Client Settings/on the bottom left side. Assign clients to Practice Areas in Clients (screen)/ Matters right side of screen, use the down arrow menu to select the appropriate Practice Area.

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

Report Contains: Practice Area | MTD (month to date) Revenue (payments) | MTD (month to date) Percent (of total payments received)| YTD (year to date Revenue (payments received) | YTD (year to date) Percent (of total payments received).

Running Report:

Date : The default date is the current date. Use the down arrow to select other dates.

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 Control F and entering your search word in the search box (for Macs use Command F).

End 2/11/16