

**History Statements:** For every client billed, a history of billed charges and credits formatted like regular statements. Default selection is full history, but you can select to display and print Statement date ranges within the client's billing history.

**Overdue Clients (Overdue Statements):** Special statements for Clients with Overdue balances with specialized wording bringing the client's attention to their overdue balance. Can be printed anytime.

## Reports

### In Program Reports

**Log Reports:** Customizable reports of Log Entries for any date range, for unbilled, billed or both, firmwide, by client or by user. You can create your own Fee Report, Payment Report, Trust and Retainer Reports for any data range, for any client or any user.

**Invoice Report:** A customizable client invoice format which can include fees only, costs only, credits and summary.

**Installment Billing Report:** List of the clients who are paying by installments and whether or not they are overdue.

### Trust/Retainer Reports:

**Trust/Retainer Balance Report** (most commonly used): Displays all clients with Trust/Retainer Beginning Balances, Deposits, Disbursements, Transfers (important total for knowing how much to transfer from your Trust/Retainer account into your General Account).

**Trust/Retainer Activity Detail Report:** Displays each Trust/Retainer entry for each client with totals.

**Accounts Receivable Report** (who owes how much and for how long): Overdue Client amounts aged up to 120 days. with the last payment amount and date. Customizable to include Closed Clients and display by oldest balances, name or date last paid.

**Work In Process Report** (Unbilled Report): A listing of all clients with Unbilled (not yet billed) Fees and Cost charges with date last billed and aging of unbilled.

**Productivity Report:** For any date range, A summary by client of hours and fees charged to each client by each user with totals by user and office.

**Revenue by Practice Area:** Month to Date (MTD) and Year to Date (YTD) Payments Received by Practice Area. Your office establishes Practice Areas in Settings/Client Settings.

**Office Totals Report: Year to Date** (soon to be Date Range with YTD default): Year To Date Totals for all Charges and credits (Payments, Trusts, Retainers) with Billed and Unbilled Balances.

Reports Not In Program (ordered by email and delivered overnight in Spreadsheet format)

**Full Client Listing of Active and Inactive Clients:** with full address, Start date, and Bill Type (Hourly, Flat Rate, Contingency, Non-Chargeable)

**Client listing with Phone and or/Email.**

**Client listing with Rates by User.**

**Client's File To Date Totals Report - Active, Inactive or Both:** For each client, total File To Date Hours, Fees, (Fee Write-downs) Costs, Late Charges, Payments, Trusts and Retainers by Client with Trust, Retainer and File Balances.

**Client's Year to Date Totals Report - Active, Inactive or Both:** (any year): For each client, total Year To Date Hours, Fees, (Fee Write-downs) Costs, Late Charges, Payments, Trusts and Retainers by Client with Trust, Retainer and File Balances.

**Practice Area Report - Active, Inactive, or Both:** For any date range, for each Practice Area, total Hours, Fees, (Fee Write-downs) Costs, Late Charges, Payments, Trusts and Retainers.