

Attorney Reports

- List by Code
- List by Name
- List by Class
- Active Attorneys
- Inactive Attorneys
- Attorneys in Specific Class
- As PDF
- As Excel File

Client Reports

- Active in Specific Date Range
- By Code
- By Name
- By Primary Assigned Attorney
- Summary of Clients
- Detailed List of Clients
- Active Clients
- Open Clients
- Closed Clients
- Clients for Specific Attorney
- As PDF
- As Excel File

Matter Reports

- Active within Specific Date Range
- Matters by Client
- Matters by Billing Attorney
- Matters by Responsible Attorney
- Matters by Code
- Matters by Name
- Active Matters
- Completed Matters
- Closed Matters
- Open Matters
- Matters for Specific Attorney
- Matters for Specific Client
- Matters for Specific Matter Type
- Matters with Rates Assigned
- As PDF
- As Excel File
- Vendor Reports:
 - Vendor Summary
 - Vendor Detail

- Vendors Complete List
- Active Vendor List
- Inactive Vendor List
- By Code
- By Name
- Vendors with 1099's
- As PDF
- As Excel File

Work In Process (WIP) Reports

- By Service Date
- By Date Entered
- By Date Invoiced
- Specific Start/End Date
- For Specific Client
- For Specific Matter
- For Specific Contributing Attorney
- For Specific Billing Attorney
- For Specific Originating Attorney
- For Specific Invoice Number
- For Specific Bill Code
- With Specific Description Text
- Complete WIP
- Fees Only
- Costs Only (Disbursements & Expenses)
- Expenses Only
- Disbursements Only
- Adjustments Only
- Scheduled (Non-Billed) Only
- As Adjusted
- As Originally Entered
- Un-Billed
- Billed
- Billed & Un-Billed
- Recomputed
- All WIP
- Billable Only
- Non-Billable Only
- Contingent Only
- Including/Excluding Zero Balance WIP
- Detailed WIP
- Summarized by Bill Code
- Summarized by Matter
- Summarized by Client

Summarized by Contributing Attorney
Summarized by Billing Attorney
Summarized by Originating Attorney
As PDF
As Excel File

By Billing Attorney
By Client
By Matters
By Matter Type
By Minimum WIP Amount
By Interim Bill Month
By Interim Bill Cycle

Calendar Reports

WIP by Date of Service
WIP by Date of Entry
WIP Sorted by Date
WIP Sorted by Client/Matter
WIP Between Specific Start/End Dates
WIP for Specific Attorney
WIP for Specific Client
WIP for Specific Matter
Calendar for Specific Attorney(s)
Calendar Between Specific Start/End Dates
Calendar by Client
Calendar by Matter
Calendar by Location
Calendar by Calendar Type
Calendar All Entries
Calendar Open Entries
Calendar Completed Entries
Calendar Summarized by Attorney
Calendar Summarized by Firm
Calendar Sorted Chronological
Calendar Sorted by Client/Matter
Calendar Appointments
Calendar To Do Items
Calendar by Week at a Glance
Calendar Activity List

Invoicing Reports

Billing Journal
As PDF
As Excel File
Draft Bills
Invoices
As ASCII ELF Format File
As ASCII LEDES 1998B Format File
AS ASCII Litigation Advisor Format File
AS ASCII Detailed WIP File
By Invoice Date
By Cutoff Date

Split Invoicing Reports

By General Client
By General Matter
By Split Client
By Invoice Number
As PDF
As Excel File
As LEDES 1998B File

Hours Worked Reports

By Specific Date
For Specific Contributing Attorney
For Client
As Originally Entered
As Adjusted
All WIP
Billable WIP
Non-Billable WIP
Contingent WIP
As PDF File
As Excel File

Accounts Receivable Reports

By Specific Date Range
For Specific Client
For Specific Matter
For Specific Contributing Attorney
For Specific Billing Attorney
For Specific Originating Attorney
For Specific Invoice Number
For Specific Lower/Upper Dollar Amount
All Detail
Bills Only
Receipts Only
On-Account Only
Detail A/R
Transaction Totals Only

- Summarized by Contributing Attorney
- Summarized by Billing Attorney
- Summarized by Originating Attorney
- Included Zero Balance Invoices
- As PDF
- As Excel File

Aged Accounts Receivable Reports

- Through Specified Date
- For Specific Attorney
- For Specific Client
- For Specific Matter
- Sorted by Client
- Sorted by Contributing Attorney
- Sorted by Billing Attorney
- Sorted by Originating Attorney
- Summarized by Invoice
- Summarized by Matter
- Summarized by Client
- Summarized by Attorney
- Invoices and On-Account Invoices
- Outstanding Invoices Only
- On-Account Balances Only
- Fees, Disbursements and Expenses
- Fees Only
- Disbursements Only
- Expenses Only
- Costs Only (Expenses & Disbursements)
- Active and Bad Debt
- Omitting Bad Debt
- Bad Debt Only
- Include/Exclude 30, 60, 90 & 120 Days
- As PDF
- As Excel File

Billing Journals

- For Specific Date Range
- For Specific Attorney
- For Specific Client
- For Specific Matter
- Sorted by Client
- Sorted by Contributing Attorney
- Sorted by Billing Attorney
- Sorted by Originating Attorney
- Summarized by Sort Order

- Summarized by Contributing Attorney
- Summarized by Billing Attorney
- Summarized by Originating Attorney
- Invoice Level Detail
- Matter level Detail
- Client Level Detail
- Attorney Level Detail
- Complete Fees, Disbursements & Expenses
- Fees Only
- Disbursements Only
- Expenses Only
- Costs (Expenses & Disbursements) Only
- No Transactions
- All Transactions
- Omit Invoices Paid In Full
- As PDF
- As Excel File

Cash/Adjustment Journals

- For Specific Date Range
- For Specific Attorney
- For Specific Client
- For Specific Matter
- Sort by Deposit Date
- Sorted by Client
- Sorted by Contributing Attorney
- Sorted by Billing Attorney
- Sorted by Originating Attorney
- Summarized by Sort Order
- Summarized by Contributing Attorney
- Summarized by Billing Attorney
- Summarized by Originating Attorney
- Invoice Level Detail
- Matter level Detail
- Client Level Detail
- Attorney Level Detail
- All Receipt Types
- Accounts Receivable Receipts
- On-Account Receipts
- Cost Reimbursement Receipts
- Miscellaneous Receipts
- Adjustments Only
- Receipts Only
- Complete Fees, Disbursements & Expenses
- Fees Only

Disbursements Only
Expenses Only
Costs (Expenses & Disbursements) Only
As PDF
As Excel File

Client Statements

For Specific Date Range
For Specific Attorney
For Specific Client
For Specified Days Delinquent
Summarized by Client
Summarized by Matter
Positive Amount Due Only
All Balances Due
Include On-Account and A/R Invoices
A/R Invoices Only
Include Bad Debt and Active Clients
Active Clients Only
Bad Debt Only

Printing Checks/Check Stubs

By Cash G/L Account
By Vendor
By Client
By Matter
By Attorney
By Distribution G/L Account
By Due Start/End Dates
Sorted by Due Date
Sorted by Vendor
Sorted by Check Date
Sorted by Check Number
Sorted by Due Date

Cash Requirements Reports

By Cash G/L Account
By Vendor
By Client
By Matter
By Attorney
By Distribution G/L Account
By Due Start/End Dates
Sorted by Due Date
Sorted by Vendor

Sorted by Check Date
Sorted by Check Number
Sorted by Due Date

Bank Statement Reconciliation

By Cash Account
By Reconciliation Date

Check Register Reports

Sorted by Check Number
Sorted by Vendor
For Specific Cash Account
For Specific Vendor
For Specific Start/End Date
For Specific Check Number
Summary Only
Full Detail Report
1099 Only
Blank Vendor Only
All Checks
As PDF
As Excel File

1099 Forms

By Cash Account
For Specific Start/End Dates
For Specific Vendor
For Specific Minimum Dollar Amount
For Rents
For Royalties
For Other Income
For Non-Employee Compensation

G/L Trial Balance Reports

For Specified Start/End Dates
For Specific Starting/Ending G/L Number Range
For Specific Attorney
For Specific Journal Entry Source
Summarized by G/L Account
Summarized by Major/Sub Account
Summarized by Detail Transactions
Summarized by Journal Entry
Including Balance Only Line Items
Including All Line Items
As PDF

As Excel File

Manual Journal Entries

Financial Statements

Through Date
Balance Sheet
YTD Income Statement
MTD & YTD Income Statement
Comparative Income Statement
Comparative Budget Statement
Cash Basis Report
Accrual Basis Report
For Specific Attorney
Summarized by Detail G/L Account
Summarized by Major/Minor Account
Summarized by Major Account
Including Balance Only Line Items
Including All Line Items
Trust Ledgers:
For Specific Date Ranges
By Trust Account
By Client
By Matter
Summarized by Client
Summarized by Matter
Detail Ledger
Non-Zero Balances Only
Zero and Non-Zero Balances
As PDF
As Excel File

Year End Close Journal Report

YTD Performance Productivity

For Specific Date Ranges
For Specific Attorney
For Specific Client
Sorted By Name
Sorted by YTD Fees Billed
Sorted by YTD Fees Received
Sorted by YTD Hours Worked
Limited Selection to Top Entries
Summarized by Contributing Attorney
Summarized by Billing Attorney

Summarized by Originating Attorney
Summarized by Client
Company Totals Only
As PDF
As Excel File

Daily Activity Reports

For Specific Date Range
By Cash Account
Cash
Accounts Receivable
Work In Process
As PDF
As Excel File

Ranking Productivity Reports

For Specific Date Range
Summarized by Contributing Attorney
Summarized by Billing Attorney
Summarized by Originating Attorney
Summarized by Client
Including Billable & Contingent
Billable Only
Contingent Only
As Originally Entered
As Adjusted
Limit Selection to Top Entries
As PDF
As Excel File

Realization Productivity Reports

Fees Worked Specific Date Range
For Specific Attorney
For Specific Client
For Specific Matter
Sorted by Contributing Attorney
Sorted by Billing Attorney
Sorted by Originating Attorney
Sorted by Client
Summarized by Attorney
Summarized by Client
Summarized by Matter
Including Billable & Contingent
Including Billable Only
Including Contingent Only

Based on Actual Performance
Based on Fees Worked
As PDF
As Excel File

Attorney Budget Reports

For Specific Date Ranges
Hours and Fees as Adjusted
Hours and Fees as Originally Worked
As PDF
As Excel File

Document Repository Reports

Sorted by Document Name
Sorted by Date Uploaded
Sorted by File Type
Sorted by File Size

Backups and Downloads

A/R Entries
Attorneys
Attorney Classes
Attorney Rates
Bill Codes
Bills
Clients
Disbursements
Disbursement Details

Document Repository Entries
Document Folders
Document Logs
Documents
Docket Types
G/L Numbers
G/L Transactions
Journal Entries
Journal Details
Journal Sources
Locations
Matters
Matter Types
Recurring Billing
Receipts
Schedule Templates
Split Bill Distributions
Scratch pads
Scratch pad Details
Scratch pad Responses
Calendar Templates
Trust Accounts
Users
Vendors
Vendor Distributions
WIP Adjustments
WIP Entries