

Billing Matters can produce a report listing the revenue your firm has received during any date range.

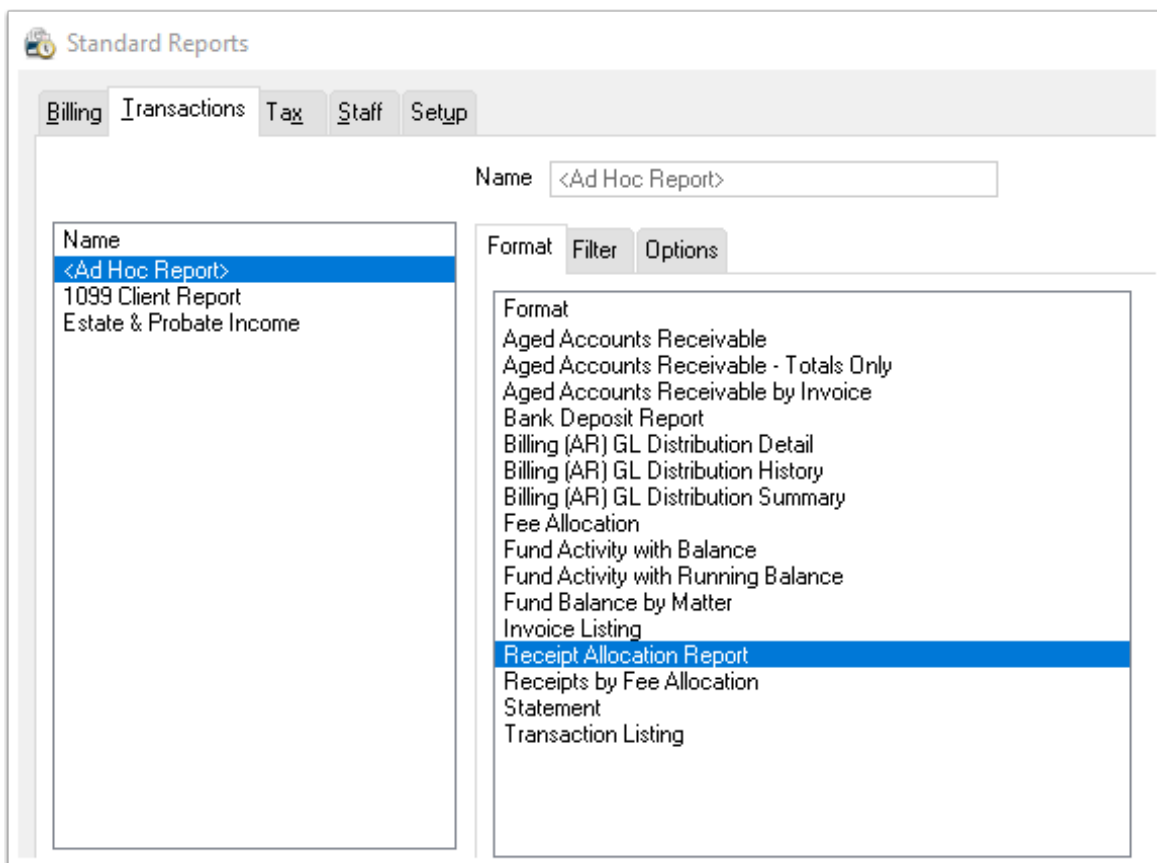
The report can list a subtotal for each timekeeper.

You can save the settings for a Revenue per Timekeeper Report as a Report Specification.

Select Receipt Allocation Report

To create a Report Specification for a Revenue per Timekeeper report:

1. Go to Time Matters Main Menu / Reports / Standard Reports.
2. Click the **Transactions** tab.
3. Click **<Ad Hoc Report>**
4. On the **Format** tab, click **Receipt Allocation Report**.



The screenshot shows the 'Standard Reports' window. At the top, there are tabs for 'Billing', 'Transactions', 'Tax', 'Staff', and 'Setup'. The 'Transactions' tab is selected. Below the tabs, there is a 'Name' field containing '<Ad Hoc Report>'. To the left of the main content area is a list of report names: '<Ad Hoc Report>', '1099 Client Report', and 'Estate & Probate Income'. The '<Ad Hoc Report>' is highlighted. To the right of this list is a 'Format' tab, which is selected. Below the 'Format' tab is a list of report formats: 'Aged Accounts Receivable', 'Aged Accounts Receivable - Totals Only', 'Aged Accounts Receivable by Invoice', 'Bank Deposit Report', 'Billing (AR) GL Distribution Detail', 'Billing (AR) GL Distribution History', 'Billing (AR) GL Distribution Summary', 'Fee Allocation', 'Fund Activity with Balance', 'Fund Activity with Running Balance', 'Fund Balance by Matter', 'Invoice Listing', 'Receipt Allocation Report', 'Receipts by Fee Allocation', 'Statement', and 'Transaction Listing'. The 'Receipt Allocation Report' is highlighted.

Here the **Current Year** is selected.

Standard Reports

Billing Transactions **Tax** Staff Setup

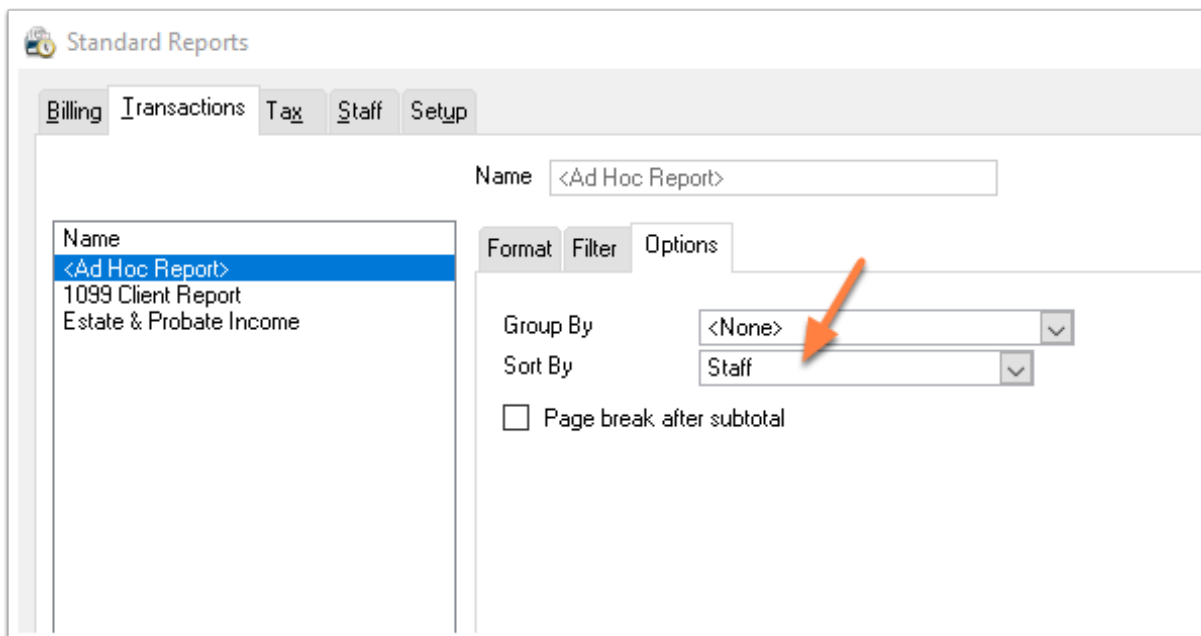
Name <Ad Hoc Report>

Name	Format	Filter	Options
<Ad Hoc Report>			
1099 Client Report			
Estate & Probate Income			

Date Range: Current Year
 From: 1/01/2020 To: 12/31/2020
 Contact:
 Client No.:
 Matter Ref:
 Matter No.:
 Staff:
 Class Code:
 Type: ☐ Time ☐ Expense ☒ Both
 Originating:
 Responsible:
 Other:

Choose Sort By Staff

On the **Options** tab, choose **Staff** from the **Sort By** drop-down.



The screenshot shows the 'Standard Reports' window with the 'Billing' tab selected. The 'Name' field is set to '<Ad Hoc Report>'. The 'Options' tab is active, showing the 'Sort By' dropdown menu set to 'Staff'. An orange arrow points to the 'Staff' option in the dropdown. The 'Group By' dropdown is set to '<None>'. The 'Page break after subtotal' checkbox is unchecked.

Name
<Ad Hoc Report>
1099 Client Report
Estate & Probate Income

Format Filter Options

Group By <None>

Sort By Staff

☐ Page break after subtotal

Add a Report Specification

1. Click the **Add** button.
2. Insert: **Revenue by Staff** in the **Name** field.
3. Save the Report Specification.

The screenshot shows the 'Standard Reports' dialog box with the 'Billing' tab selected. The 'Name' field contains 'New Report'. An orange box with the number '2' and the text 'Insert: Revenue by Staff' points to the 'Name' field. The 'Add' button is highlighted with an orange circle and the number '1'. The 'Save' button is highlighted with an orange circle and the number '3'. The 'Format' list on the right includes 'Receipt Allocation Report' which is highlighted in blue.

Standard Reports

Billing Transactions Tax Staff Setup

Name New Report

Name
<Ad Hoc Report>
1099 Client Report
Estate & Probate Income
New Report

Format Filter Options

Format
Aged Accounts Receivable
Aged Accounts Receivable - Totals Only
Aged Accounts Receivable by Invoice
Bank Deposit Report
Billing (AR) GL Distribution Detail
Billing (AR) GL Distribution History
Billing (AR) GL Distribution Summary
Fee Allocation
Fund Activity with Balance
Fund Activity with Running Balance
Fund Balance by Matter
Invoice Listing
Receipt Allocation Report
Receipts by Fee Allocation
Statement
Transaction Listing

Add Save Cancel

To Change the Date Range

If you want to run the report for a **Date Range** different from the one saved in your Report Specification, highlight the name of the Report Specification. In this example, it is **Revenue by Staff**.

1. Click **Change**.
2. Choose a different **Date Range**.

Now you can Preview or Print the report.

The screenshot shows the 'Standard Reports' dialog box with the 'Staff' tab selected. The 'Name' field contains 'Revenue by Staff'. On the left, a list of report specifications includes '<Ad Hoc Report>', 'GL Distribution Apply Funds', 'GL Distribution Funds Other', 'GL Distribution Non Funds', and 'Revenue by Staff' (highlighted). Below the list are 'Add', 'Change', and 'Delete' buttons. An orange arrow labeled '1' points to the 'Change' button. On the right, the 'Options' tab is active, showing a 'Date Range' dropdown set to 'Last Quarter'. An orange arrow labeled '2' points to this dropdown. Below the 'Date Range' are fields for 'From' (7/01/2020) and 'To' (9/30/2020), and other filter fields like 'Contact', 'Client No.', 'Matter Ref', 'Matter No.', 'Staff', 'Class Code', 'Type' (radio buttons for Time, Expense, Both), 'Originating', 'Responsible', and 'Other'. At the bottom of the dialog are 'Printer', 'Preview', 'Print', and 'Close' buttons.

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