Firm Central

Exporting and downloading data

User guide

As a law firm leaving Firm Central, it is imperative that the data be exported and downloaded BEFORE the subscription lapses. Once the subscription is lapsed, some data will no longer be available. For more information on exporting data from a lapsed Firm Central, please refer to Page 29 in this document under the section titled "Exporting Data from a Lapsed Firm Central."

We recommend you first export or download a list of all clients and cases.

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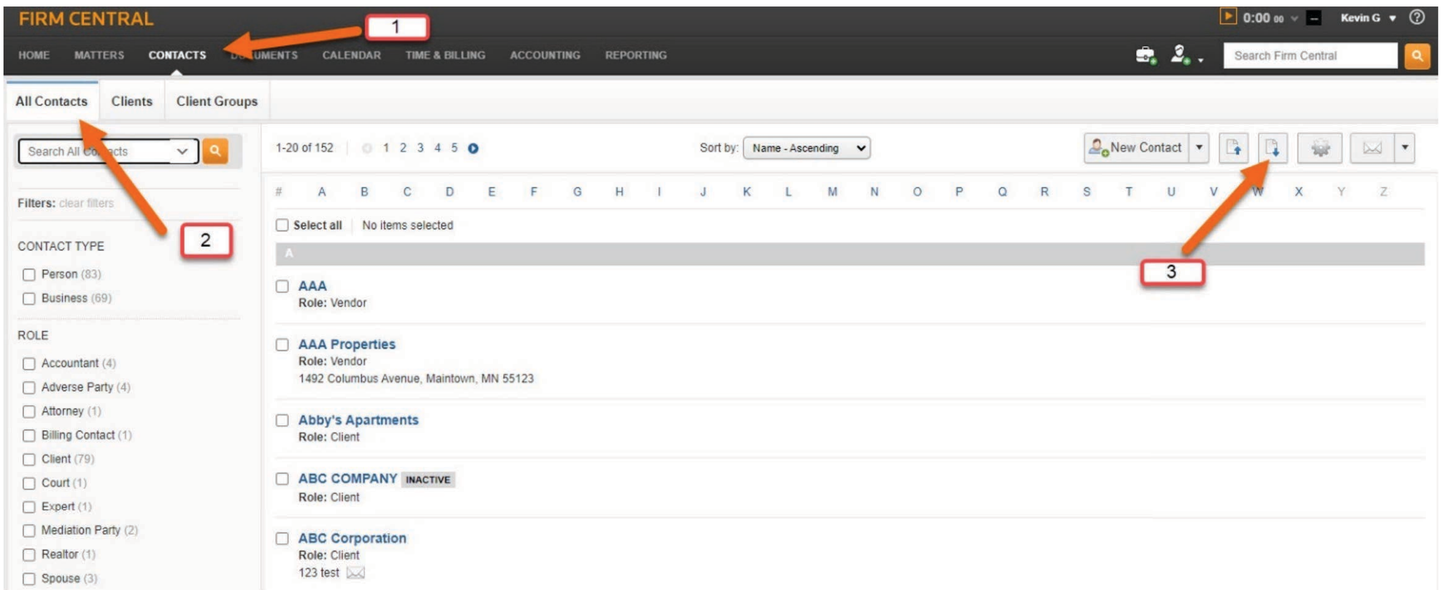
Exporting Clients and Contacts

To export the client and contact list:

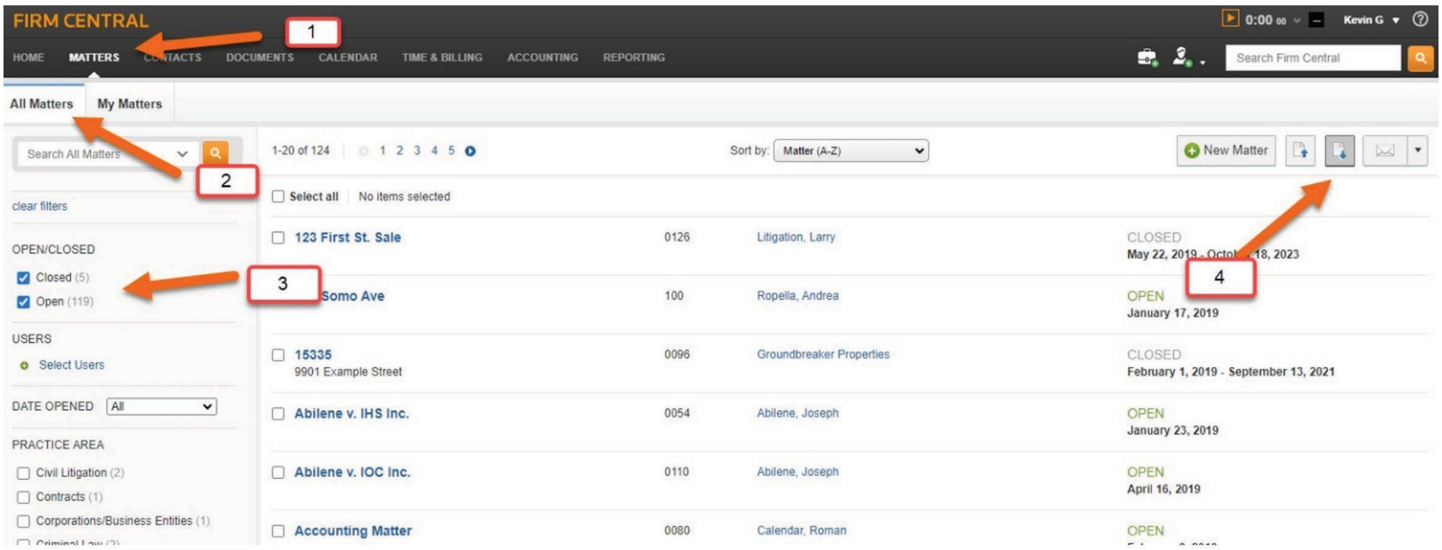
1. Select "Contacts" from the main menu.
2. Then select "All Contacts". Note: you do not need to click the "Select All" box – leaving this unclicked will allow you to download all Clients and Contacts, including any that are inactive.
3. Click on the "Export" icon in the upper right corner. This will begin the export of your Client list to a .CSV file.



Exporting Matters

To export Matters:

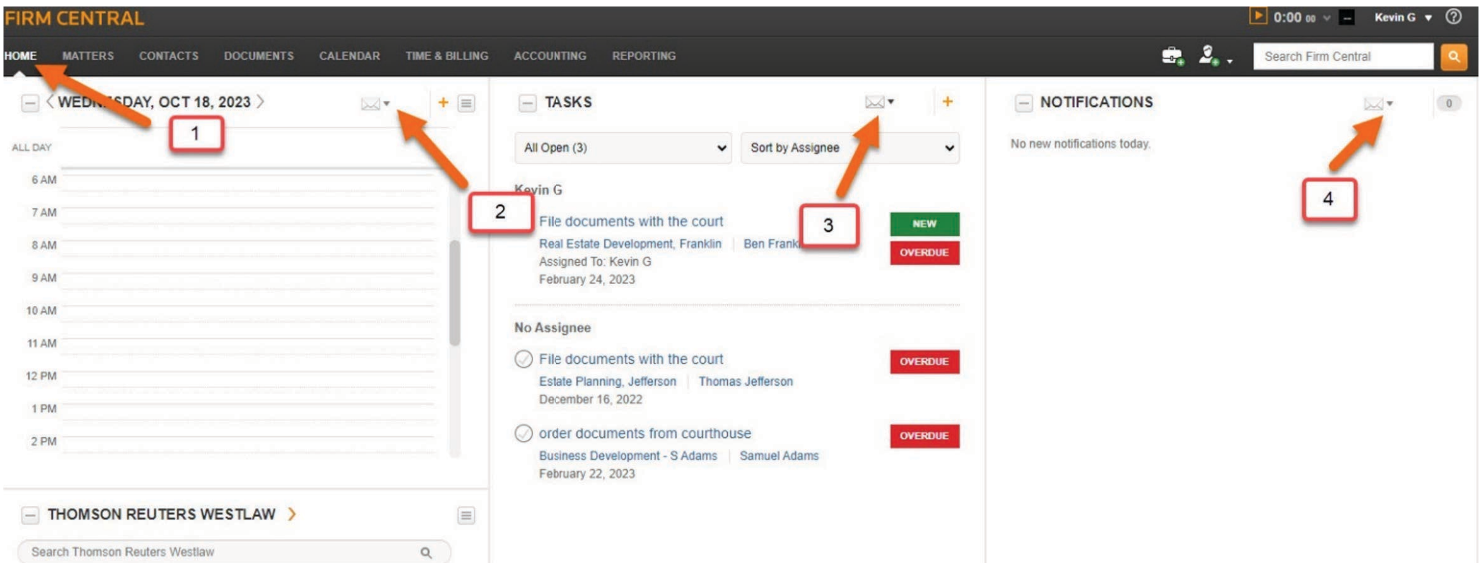
1. Select "Matters" from the main menu.
2. Select "All Matters".
3. Make sure both Open and Closed Matters are selected.
4. Click on the Export icon in the upper right corner. This will begin the export of your Matter list to a .CSV file.



Export data from the Home Page

From the Firm Central Home Page, you can export data from the Calendar, Tasks, and Notifications widgets.

1. Select "Home" from the main menu.
2. **To export Calendar data**: click on the icon to email or print data. This process is the same as outlined in the section on exporting Calendar (see page 11)
3. **To export Task data**: click on the icon to email or print data. You can select "Export Completed Tasks" from the drop-down menus as well.
4. **To export Notifications data**: click on the icon to email or print data. When printing data, most printers support the choice to "Print to PDF." We recommend using this method to create and save a digital copy.

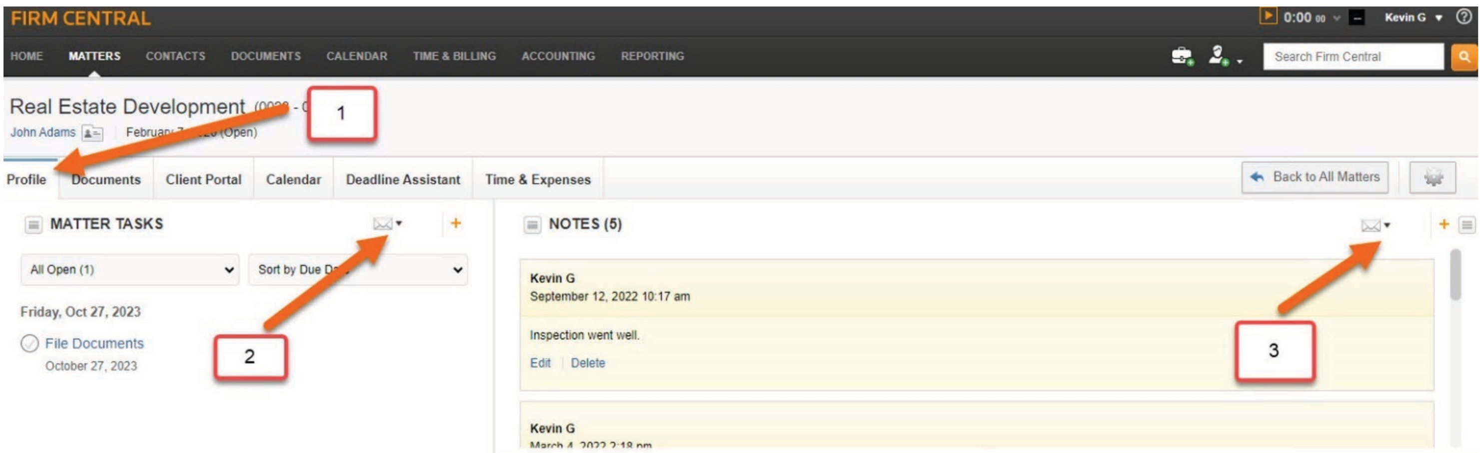


Export data from within a specific Matter

Data can also be exported or downloaded from within a specific Matter. To export this data, you will need to go into each Matter separately.

From the Profile Tab:

1. Click on the "Profile" Tab within the Matter.
2. **To export Matter Tasks**: click on the icon to email or print data.
3. **To export Notes**: click on the icon to email or print data. Most printers allow the choice to print to PDF to download the information.



Export data from within a specific Matter

Data can also be exported or downloaded from within a specific Matter. To export this data, you will need to go into each Matter separately.

From the Documents Tab:

Please refer to the Exporting Documents section (see Page 9).

From Client Portal Tab:

If you have uploaded documents to the Client Portal, please refer to the Exporting Documents section (Page 9), as the process is the same. Otherwise, you are not able to download documents directly from the Client Portal page. Also, you are not able to export messages from the Client Portal.

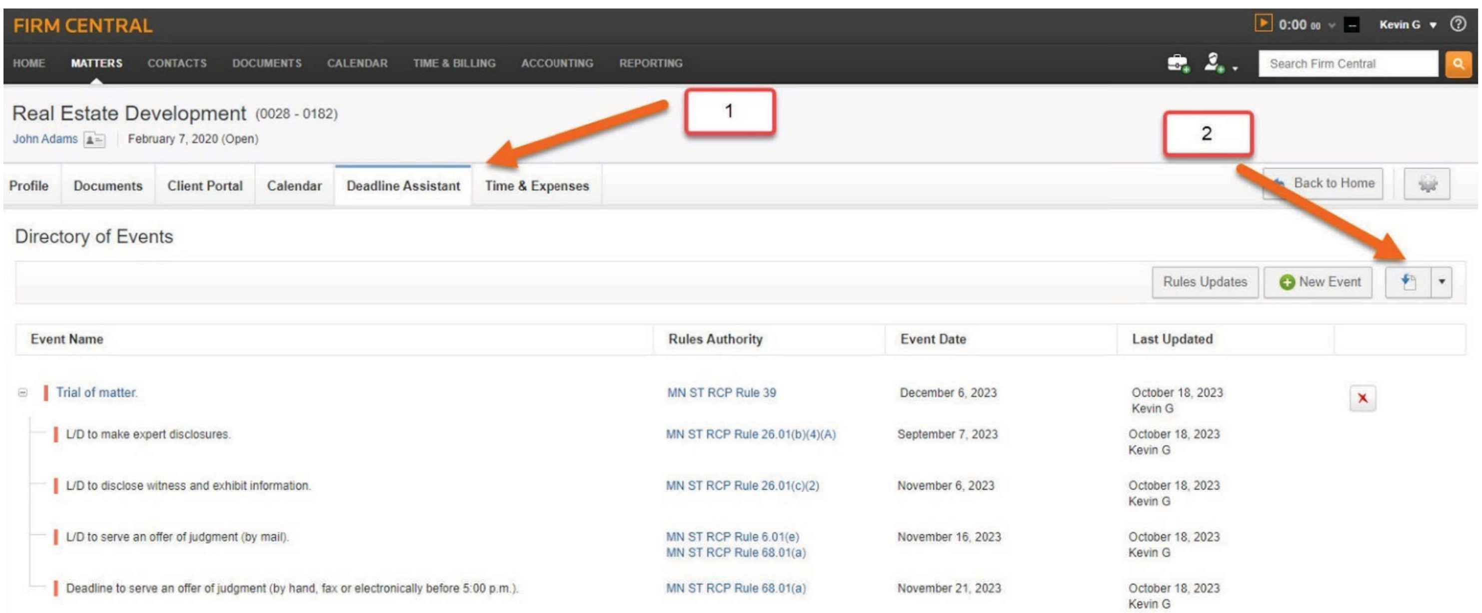
From the Calendar Tab:

Please refer to the Exporting Calendar Events section (see Page 11).

From the Deadline Assistant Tab:

For customers with the Deadline Assistant program, you can download the Events from the Calendar within the Matter. As an alternative, you can download the Directory of Events from the Deadline Assistant Tab by following these steps:

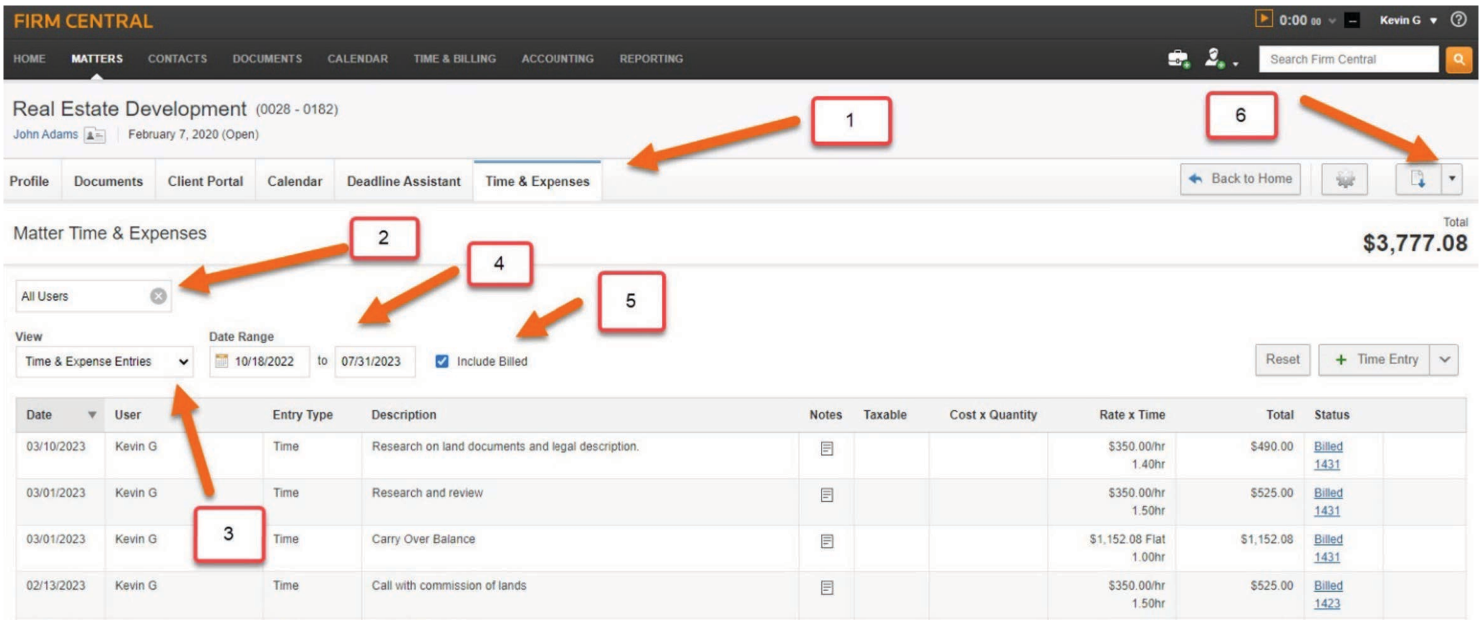
1. Select the "Deadline Assistant" tab within the Matter.
2. Click on the Export icon or down arrow and select the date range and file type to download.



From the Time and Expense Tab:

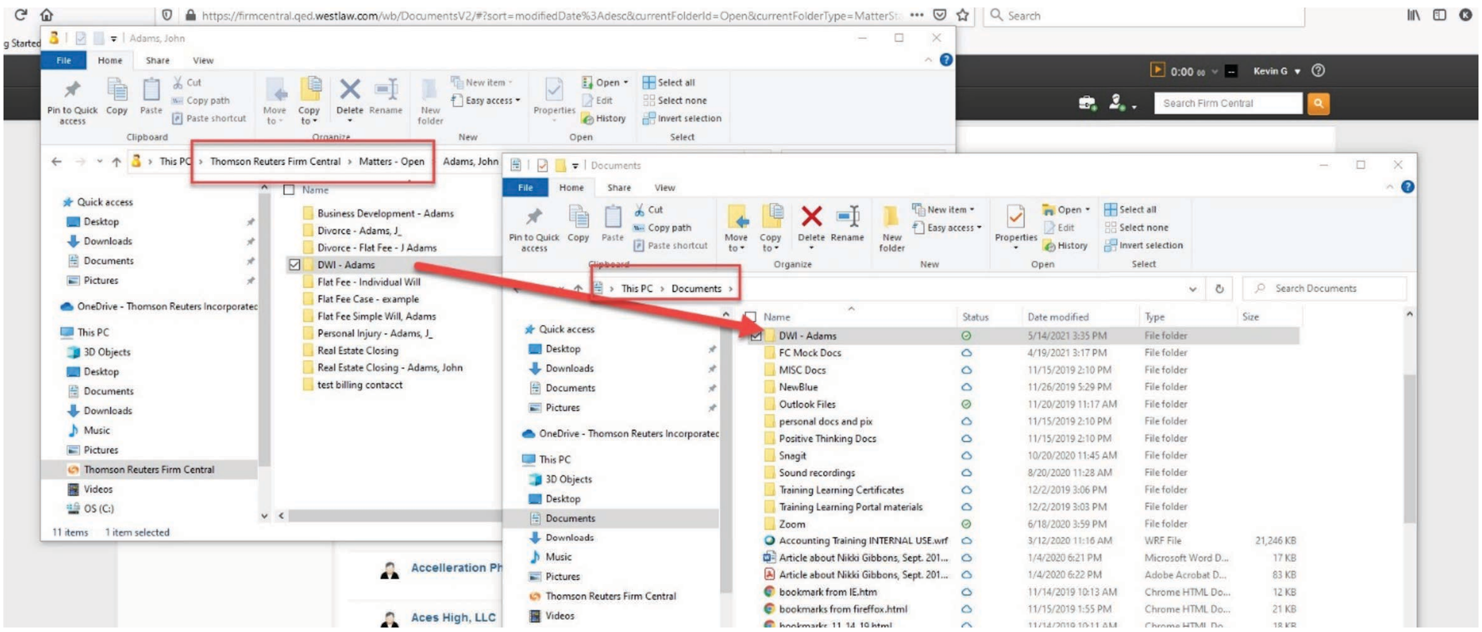
For customers with the Time & Billing module, you can download all Time and Expenses for the specific matter by following these steps:

1. Select the "Time & Expense" tab within the Matter.
2. Select the specific User or all Users.
3. Select all time and expenses, just time, or just expenses.
4. Select a date range (optional).
5. If you wish to include billed time, check the box to include billed time.
6. Click the Export icon or down arrow to export the data to a .CSV file.



Exporting Documents

Windows File Explorer is the best method to download your documents. To use this feature, you need to have the Desktop App installed. With this, you can open two file explorers and copy or drag-and-drop from one (Firm Central) to another (your own computer). In this case, you will need to manually drill down to the Matter and copy that folder. However, you can copy entire folders, which will include sub folders and files. If you have many files that need to be exported from Firm Central to your machine, we recommend that you export them in chunks (e.g., 100-to-200 at a time), rather than all of them at once. Please note that the Desktop App is only available for PC computers.



If you do not have the Desktop Software installed, you can click on this link to download and install. Please note, this software is only compatible with a Windows computer.

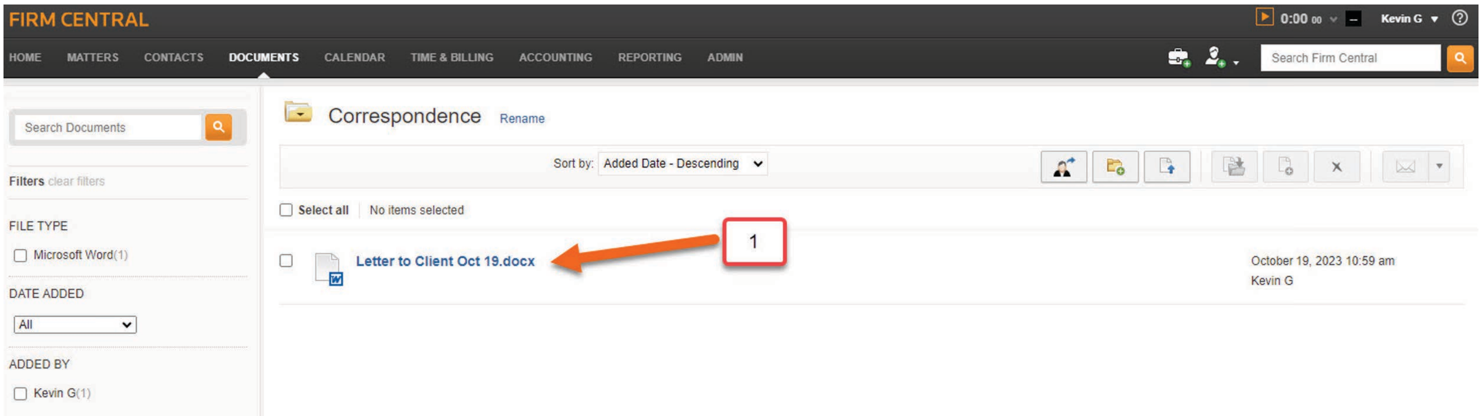
http://info.legalsolutions.thomsonreuters.com/software/firm-central/

Also, here is a help video with step-by-step instructions to download and install the Desktop Software:

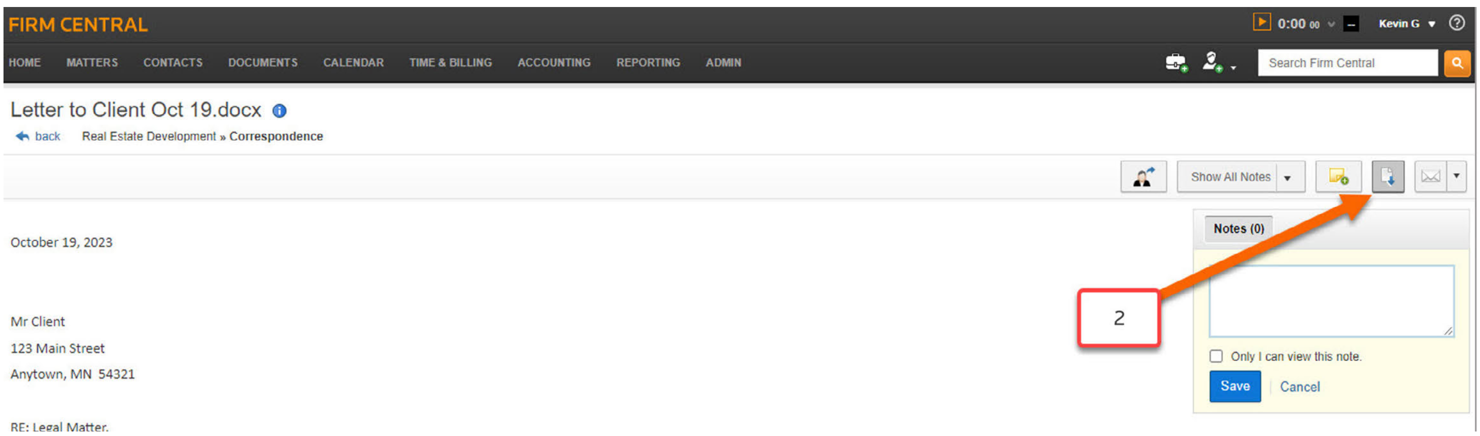
https://answers.legalprof.thomsonreuters.com/firm-central/tx4han2wuet7fah5sri5

The alternate way to download a document is within Firm Central:

1. Select the individual document by clicking on the document name highlighted in blue.



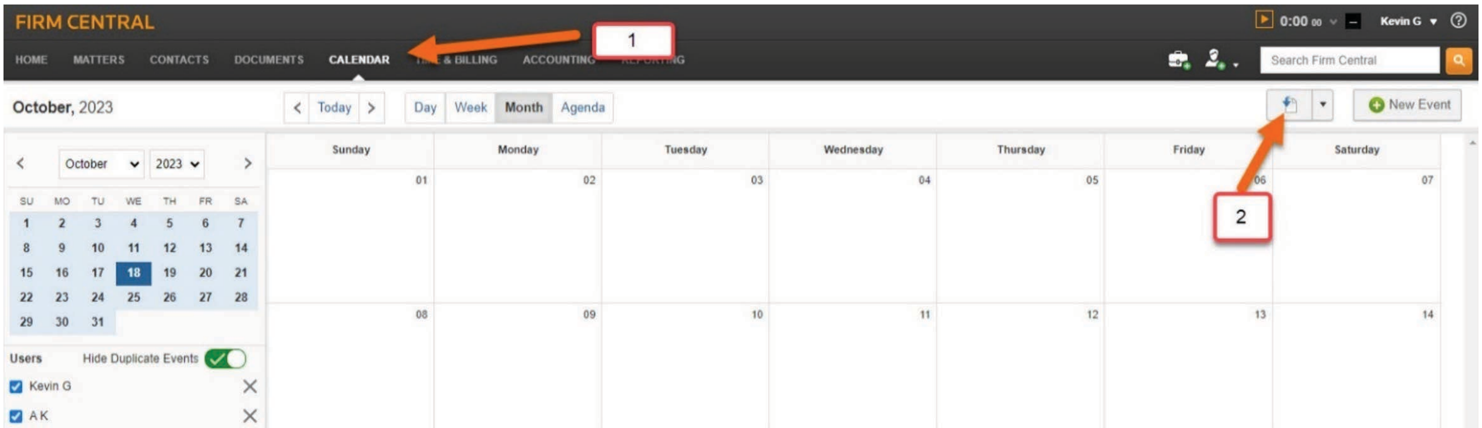
2. In the upper right corner click on the Export icon. Your document will be downloaded in its original format.



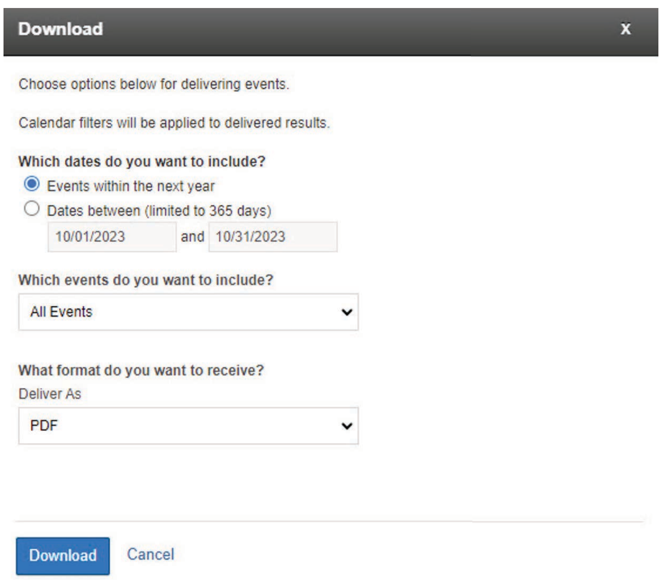
Exporting Calendar Events

To export Calendar Events:

1. Select "Calendar" from the main menu.
2. In the upper right corner, click on the Export button.



3. A pop-up window will appear with options.
4. You can select a date range to export along with which types of Events and files.



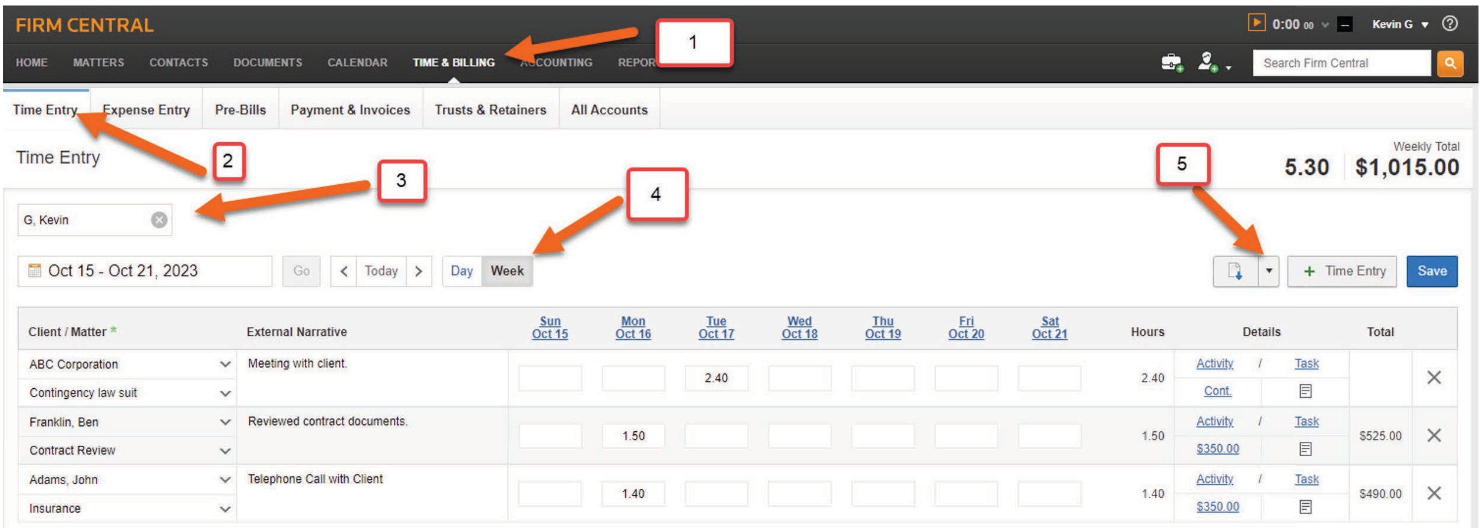
You can only export 365 days at a time. Depending on how long you have used the Firm Central calendar, you may need to run multiple exports. You can run the export in different file types; however, you should export at least one as a .CSV file, since most practice management software import/exports require .CSV files. This will allow you to import your Calendar data into another practice management system, provided it's supported.

Time & Billing

For customers with Time & Billing, it is strongly recommended to generate invoices for all unbilled time and expenses. All Pre-Bills should be generated into Invoices. We will go through each tab starting with the Time Entry Tab.

Time Entry Tab:

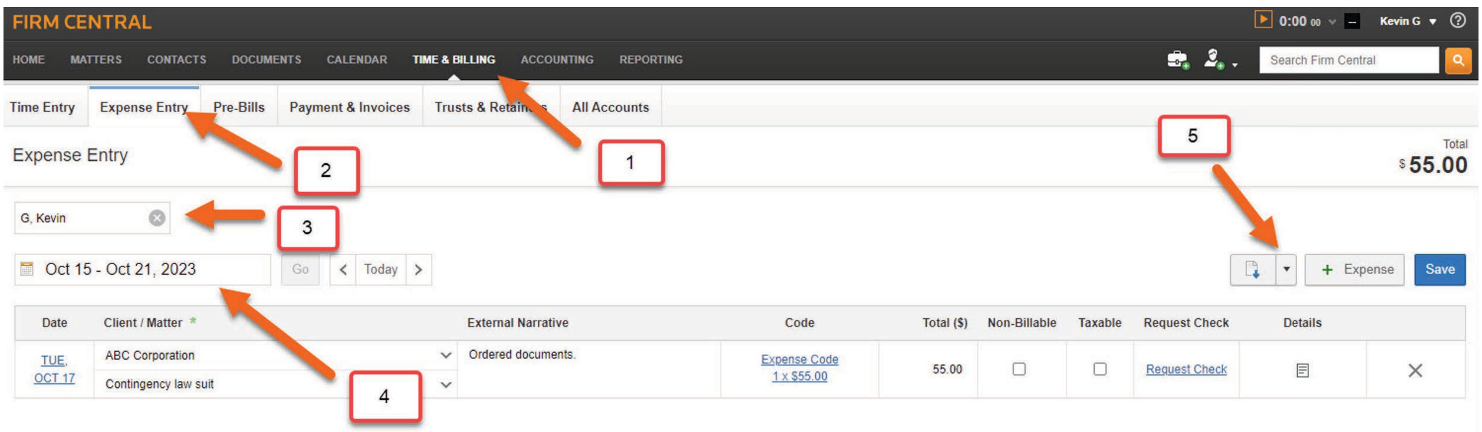
1. Select "Time & Billing" from the main menu.
2. Select the "Time Entry" Tab.
3. Select the User. Please note, you can only select one User at a time.
4. Select either "Day" or "Week". You can click into the calendar to go to a previous week.
5. Click the Export icon or down arrow to export the data to a .CSV file.



Expense Entry Tab:

Follow these steps to export expense data:

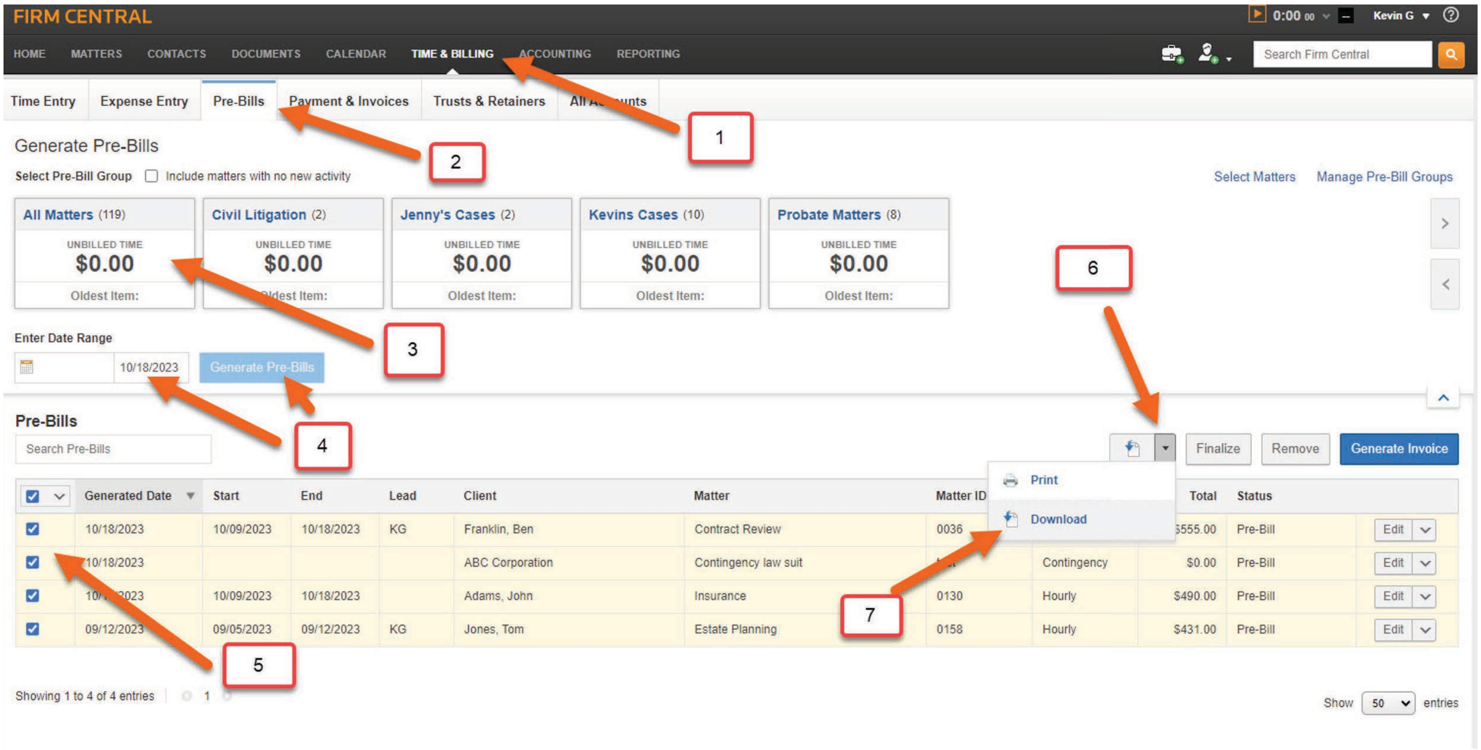
1. Select "Time & Billing" from the main menu.
2. Select "Expense Entry" Tab.
3. Select the User.
4. Select the date range. Please note, the expense date range is one week. You can click into the calendar to back date to previous weeks.
5. Click the Export icon or down arrow to export the data to a .CSV file.



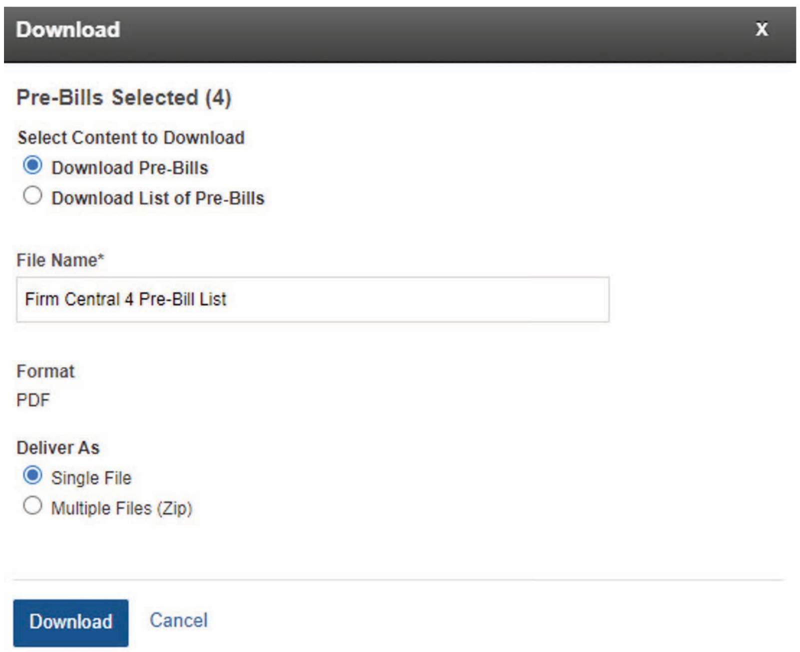
Pre-Bill Tab:

A list of your Pre-Bills can be downloaded by following these steps:

1. Select the "Time & Billing" Tab from the main menu.
2. Select the "Pre-Bills" Tab.
3. Click on the "All Matters" box.
4. Enter your desired date range and click the "Generate Pre-Bills" button.
5. Once the Pre-Bills are generated, select the Pre-Bills you want to print or click the box to select all.
6. Click on the Export icon or down arrow.
7. Select "Download".



After selecting "Download" a pop-up window will appear with options to download (all) Pre-Bills or just a list of the Pre-Bills. By selecting "Download Pre-Bills" you will then be prompted to select a delivery method as a Single File or Multiple Files (Zip file download). If you select the list, it will be in one PDF document with a summary of the Pre-Bills.

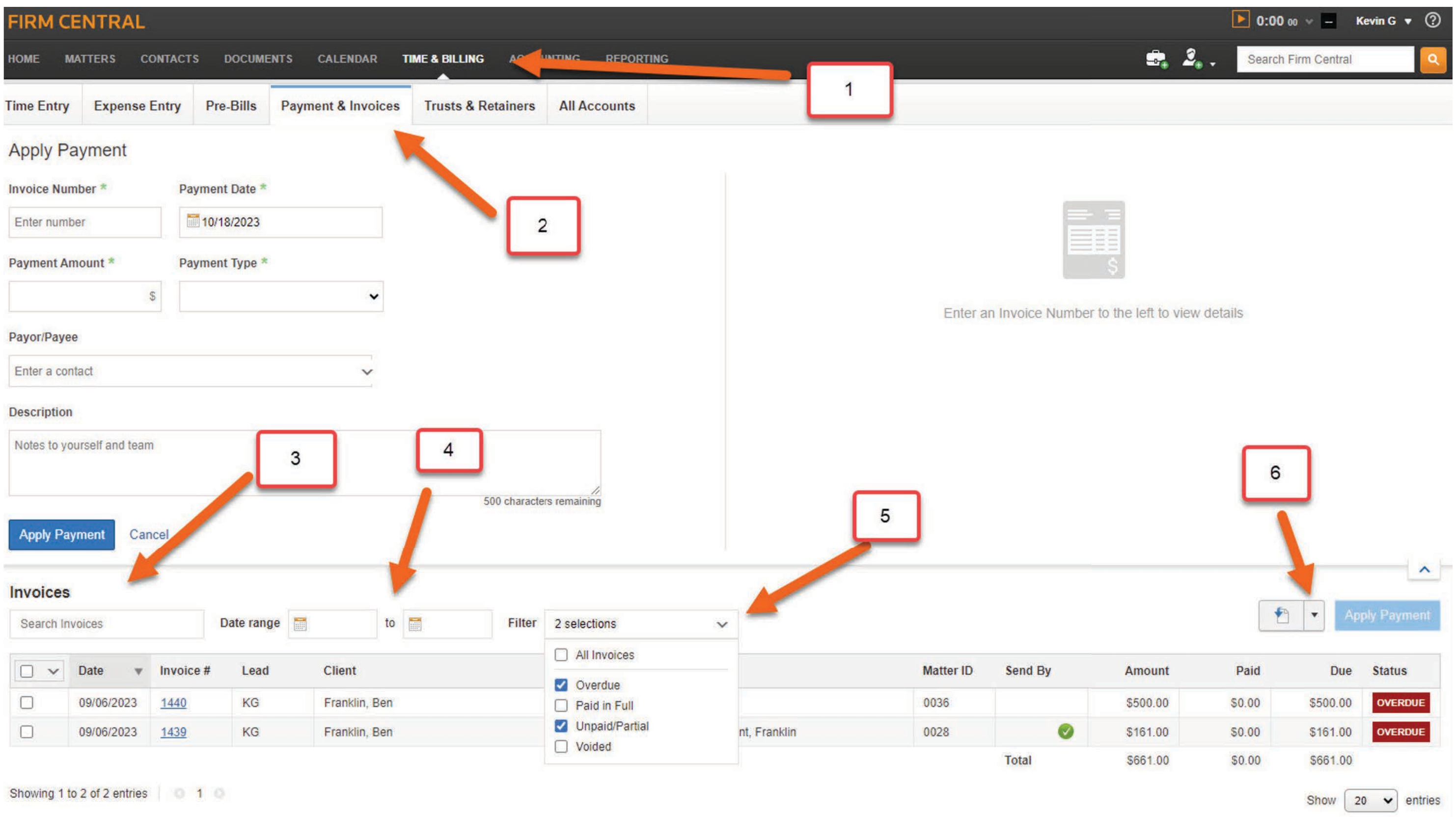


Payment and Invoices Tab:

To download invoices, follow these steps:

1. Select the "Time & Billing" Tab from the main menu.
2. Select the "Payment & Invoices" Tab.
3. Search for a specific client or matter (optional).
4. Apply a date range (optional).
5. The "Filter" drop down menu supplies the choice to download all invoices, including Paid in Full and Voided invoices.
6. Click on the Export or down arrow button. You will see three options: Print, Download, or Export. When selecting "Download" it will download the invoices as PDFs. You'll have the option to download a summary list or each invoice either as one PDF file or a ZIP file containing each invoice summary of the invoice data will export to a .CSV file.

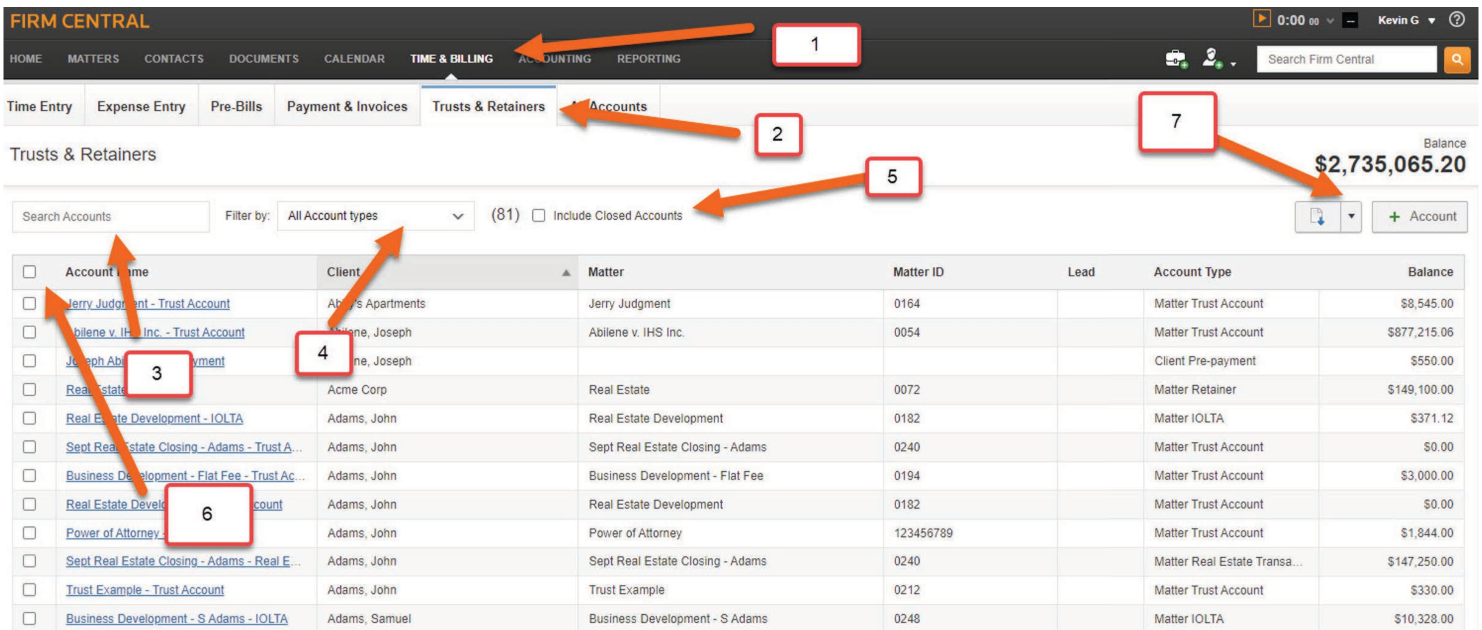
Please note: under "Reporting" you can download reports that will detail invoice time and expense entries.



Trusts & Retainers Tab:

To export data from the Trusts & Retainers Tab:

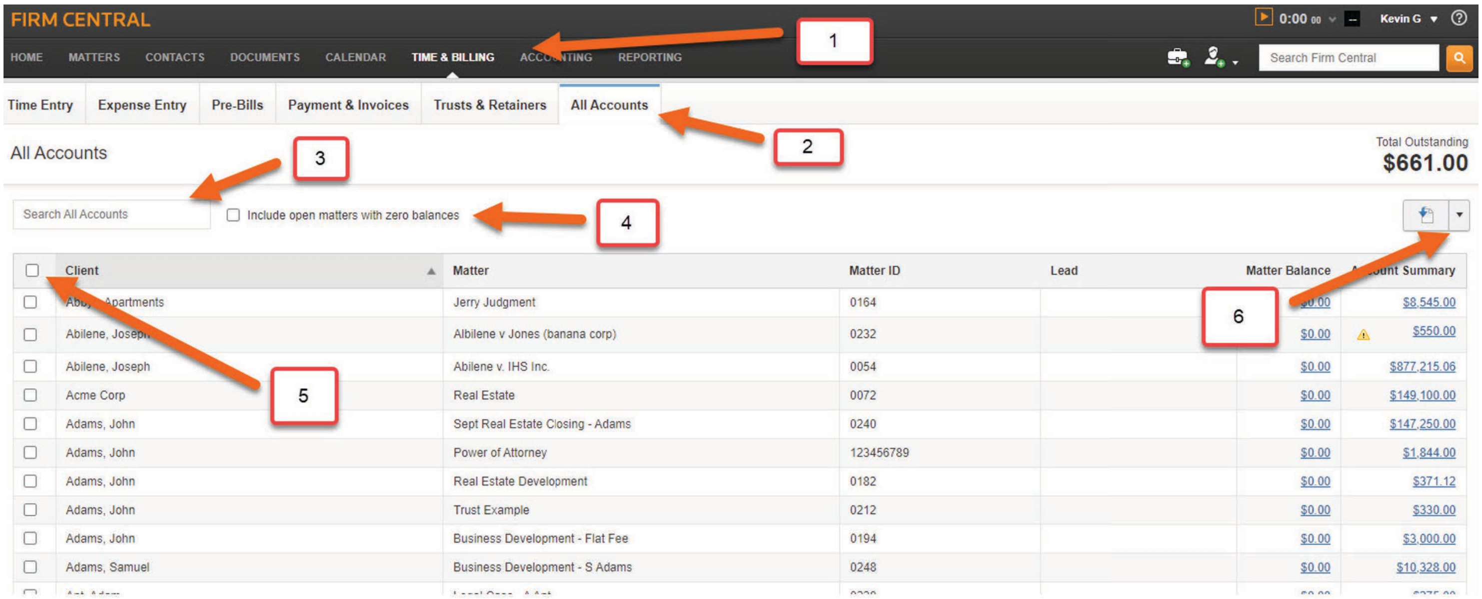
1. Select the "Time & Billing" Tab from the main menu.
2. Select the "Trusts & Retainers" Tab.
3. Select an individual Client or Matter by entering the name in the search box.
4. Select a specific account type or select all accounts.
5. Include closed accounts (optional).
6. Select individual accounts or all accounts (you do not have to make any selections if you want all accounts).
7. Once your selections have been made, click on the Export icon or down arrow. When selecting "Download" it will download the account activity as PDFs. You'll have the option to download each single account either as one PDF or a ZIP file containing each account as a PDF. If you select the choice to "Export", a summary of the invoice data will export to a .CSV file.



All Accounts Tab:

"All Accounts" supplies an account summary for each Matter. The data can be downloaded in similar way to the trust account data.

1. Select the "Time & Billing" Tab from the main menu.
2. Select the "All Accounts" Tab.
3. Select an individual Client or Matter by entering the name in the search box.
4. Include Matters with a zero balance (optional).
5. Select individual accounts or all accounts. Note: you do not have to make any selections if you want all accounts.
6. Once your selections have been made, click on the Export icon or down arrow. When selecting "Download" it will download the account activity as PDFs. You'll have the option to download each single account either as one PDF or a ZIP file containing each account as a PDF. If you select the choice to "Export", a summary of the invoice data will export to a .CSV file.



Reporting

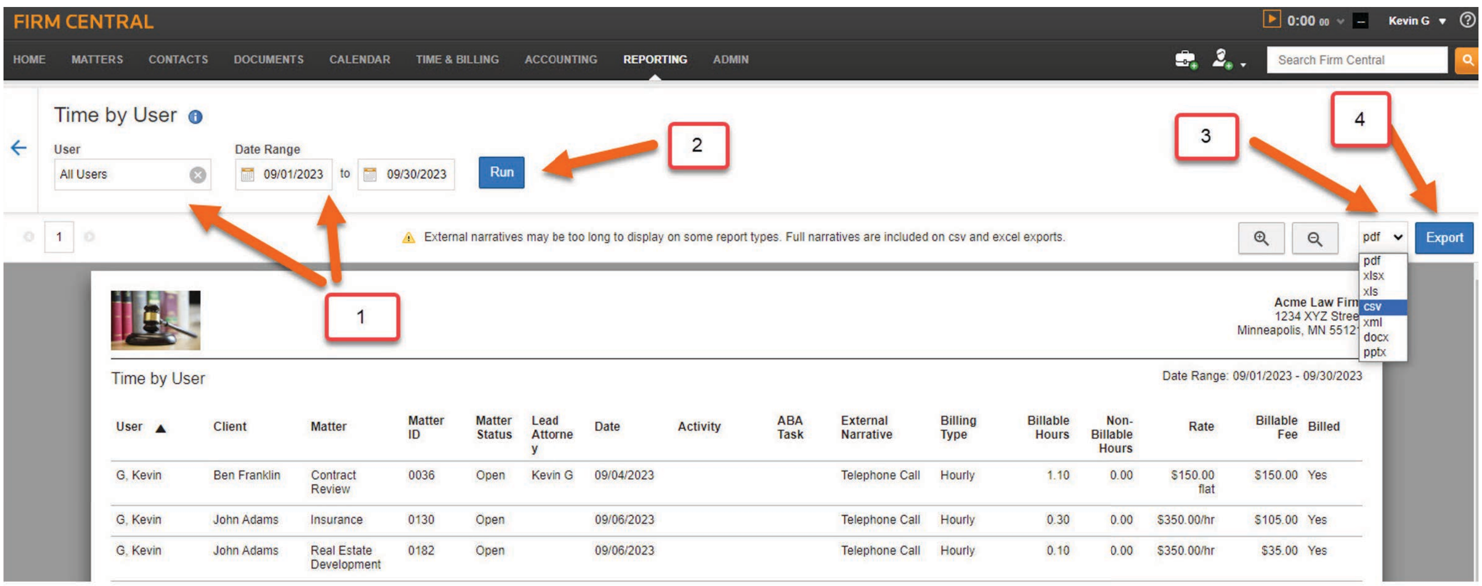
From the “Reporting” Tab you can run a series of reports to export data. We recommend you run several, if not all, the reports to capture your data.

1. Select “Reporting” from the main menu.
2. Select the “Reports” Tab.
3. On the left side of the page, you will see the report titles.
4. In the center of the page, you will see the description of each report.
5. The Category column shows the category of the report. Customers with Firm Central Accounting will have six additional report categories to choose from.
6. On the far right of the page you can select “Run” to run the desired report.

Report	Description	Category	
Sales Tax Liability	View a list of taxable transactions over a selected date range. Provides a total of the taxable transaction amount as well as a total of the tax liability amount for the selected date range.	Accounting	Run
Account Transactions	View all associated transactions including firm deposits, firm expenses, journal entries, trust transactions, invoice payments or payable payments. View for all accounts or an individual account over a selected date range. Inactive accounts are included by default. Optional ability to also view all distributions for the associated accounts.	Accounting	Run
Profit & Loss	View the firm's profit or loss for the date range selected. View if a profit or loss has been made and identify the account/s which contributed to that profit or loss. Provides a net operating income total as well as a total of the net profit or loss. Net operating income is calculated as the total income subtracted by the total expenses. Inactive accounts are included by default. Optional ability to include zero balances.	Accounting	Run
Trial Balance	View a list of accounts and their balances for a specified date. Provides a total of debits and credits. Inactive accounts are included by default. Optional ability to include accounts with zero balances.	Accounting	Run
Balance Sheet	View a point-in-time statement of the assets, liabilities, and capital of the firm. The total of the Assets and the total of the Liabilities + Equity should always match. Inactive accounts are included by default.	Accounting	Run
Vendor Summary	View a summary of vendor information including status, year-to-date spend, and current balance. The current balance column will always show the current balance due for the vendors regardless of when the report is run.Inactive vendors are included by default.	Accounting	Run
Time by User	View details of all time entries for a single user or all users during a selected period of time. Optional ability to view time entries for inactive/deleted users.	Time and Billing	Run
Time by Client	View details of all time entries for a single client during a selected period of time. Clients which have been marked as inactive are not included as a selection option.	Time and Billing	Run
Time by Matter	View details of all time entries for a single matter during a selected period of time. By default closed matters are included in the selection drop down list.	Time and Billing	Run
Collection Realization by User	View the details of billed, written off, and collected fees with realization rates broken down by invoices for a selected time frame. Will only include invoices on which a payment/collection has been made in the selected date range. The reports can be run for a single user or for all. The amount due column will always show the current amount due for the invoice regardless of the selected date range. For a partial payment the order in which payment is applied to the invoice is taxes, expenses, fees, and finance charges respectively. For a partial write off or credit the order in which the invoice is written off is finance charges, fees, expenses, and taxes. This report does not show payments or adjustments made to finance charges, expenses or taxes. Optional ability to view collection realization for inactive/deleted users.	Time and Billing	Run
Write Offs	View details for any discounts, credits or write offs applied to an invoice over a selected time period, or where a prebill has been entirely written-off. View totals for all clients or select to view for a single client. Clients which have been marked as inactive are not included as a selection option. By default closed matters are included in this report.	Time and Billing	Run
	View the details of billed and collected fees and expenses with realization rates broken down by invoices for a selected timeframe. Only includes invoices where a payment/collection has been made in the selected date range. The report can be run for a single matter, single client or for all. The amount due column will always		

After selecting your report, the report page will load. If the report allows for a date range, date range will default to the previous month. However, depending on the report, you can easily change that with options such as Client, Matter, User, and Date Range. In this example, we have selected the report "Time by User":

1. Select all Users or a specific User.
2. Select a Date Range. Please note that for the report to display on the screen the date range must not exceed 365 days. If the date range exceeds 365 days, you will be prompted to "Download the Report." When you select "Run" you will see a pop-up window informing you the report must be downloaded. Choose the file format and select "Download" to continue. Follow the prompts. If your report is less than 365 days continue to Step 3.
3. From the drop-down menu, select the file type in which you want to export the data. Reports can be exported in several file formats, including .CSV. We recommend at least one format be .CSV file because other report formats do not include information from all the fields (due to limitations in the data field). A .CSV file includes all field information.
4. Once your options have been selected, click on the "Export" button to export, and download your report.

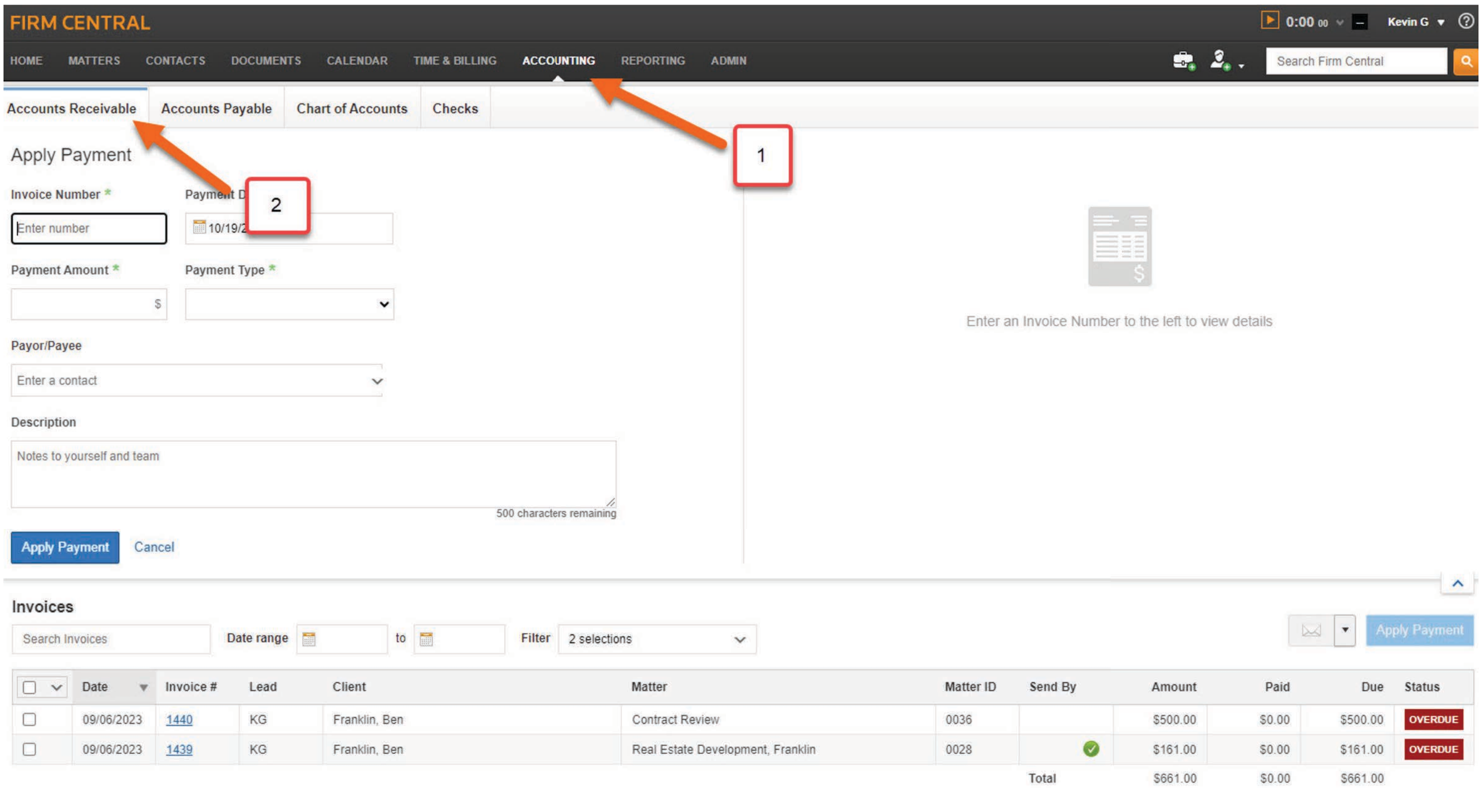


Accounting

For customers with Accounting Module, we will show how data can be exported and downloaded.

Accounts Receivable Tab:

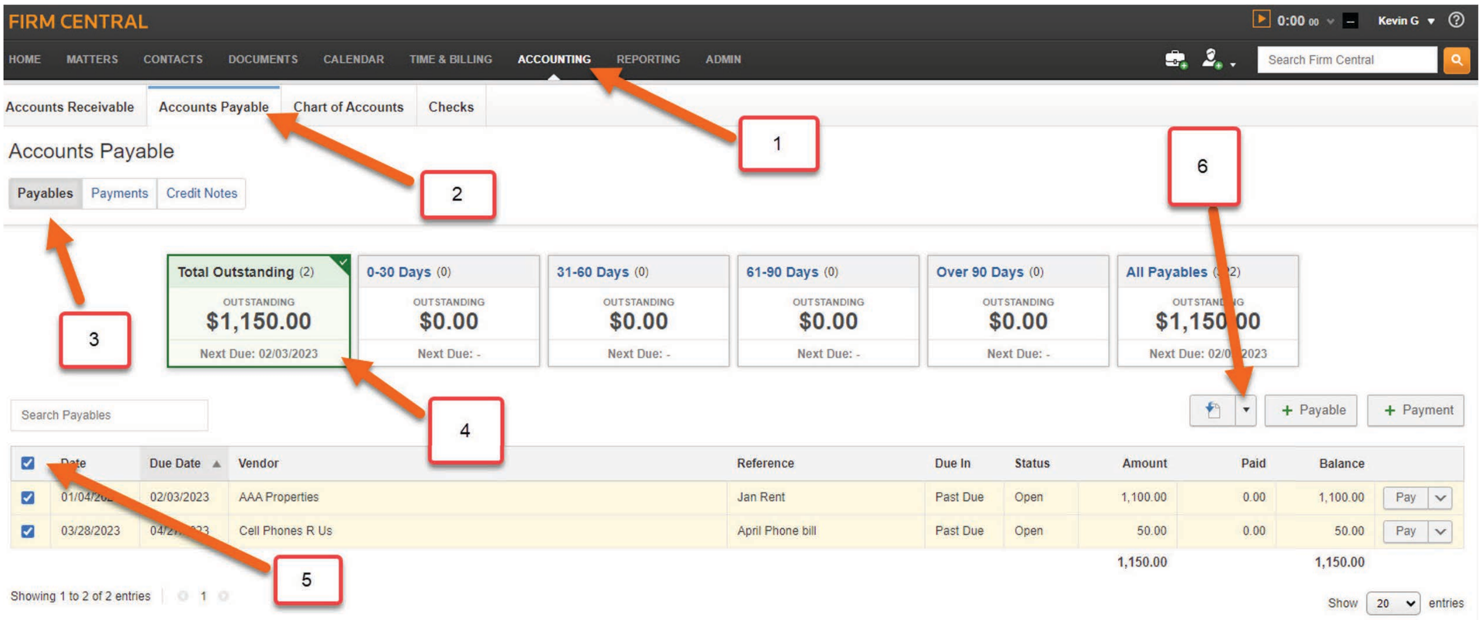
The "Accounts Receivable" Tab is identical to the "Payment & Invoices" Tab within "Time & Billing" (see Page 16 for steps to download invoices).



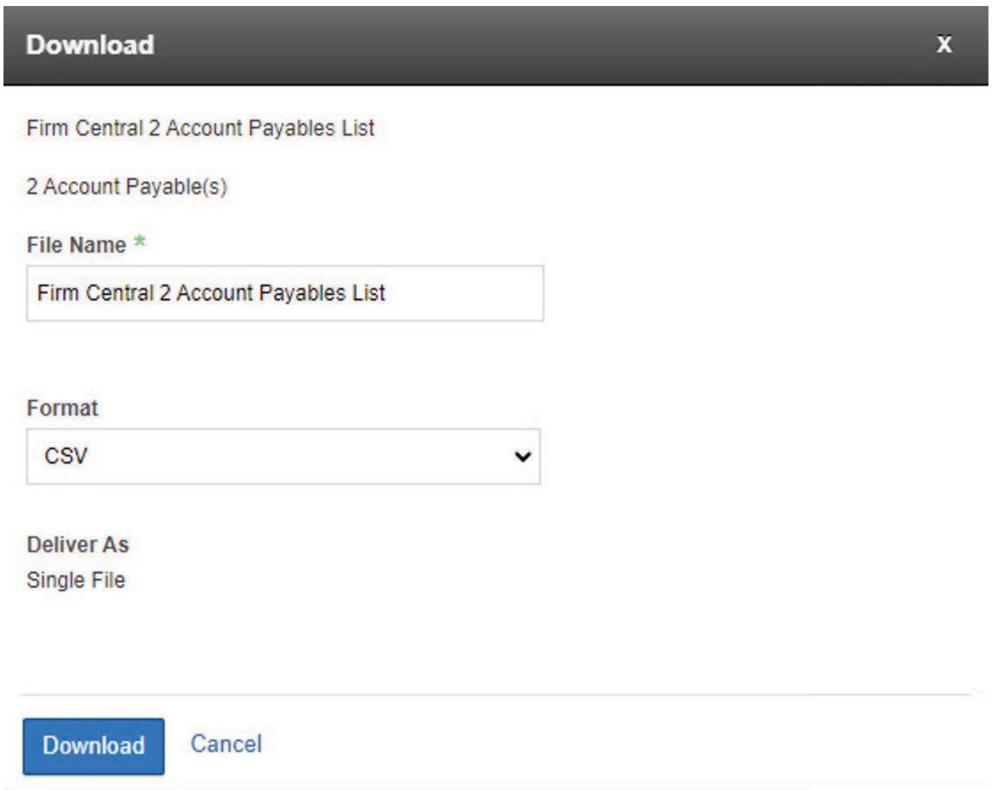
Accounts Payable Tab:

Within the Accounts Payable page, there are three (3) sub-tabs. We'll start with "Payables".

1. Select "Accounting" from the main menu.
2. Select the "Accounts Payable" Tab.
3. Select the sub-tab "Payables".
4. We recommend you click on "Total Outstanding" or "All Payables" to capture all outstanding Payables.
5. Click the "Select All" box to the far left on the page.
6. Click the Export button or down arrow to choose your option to print or download.

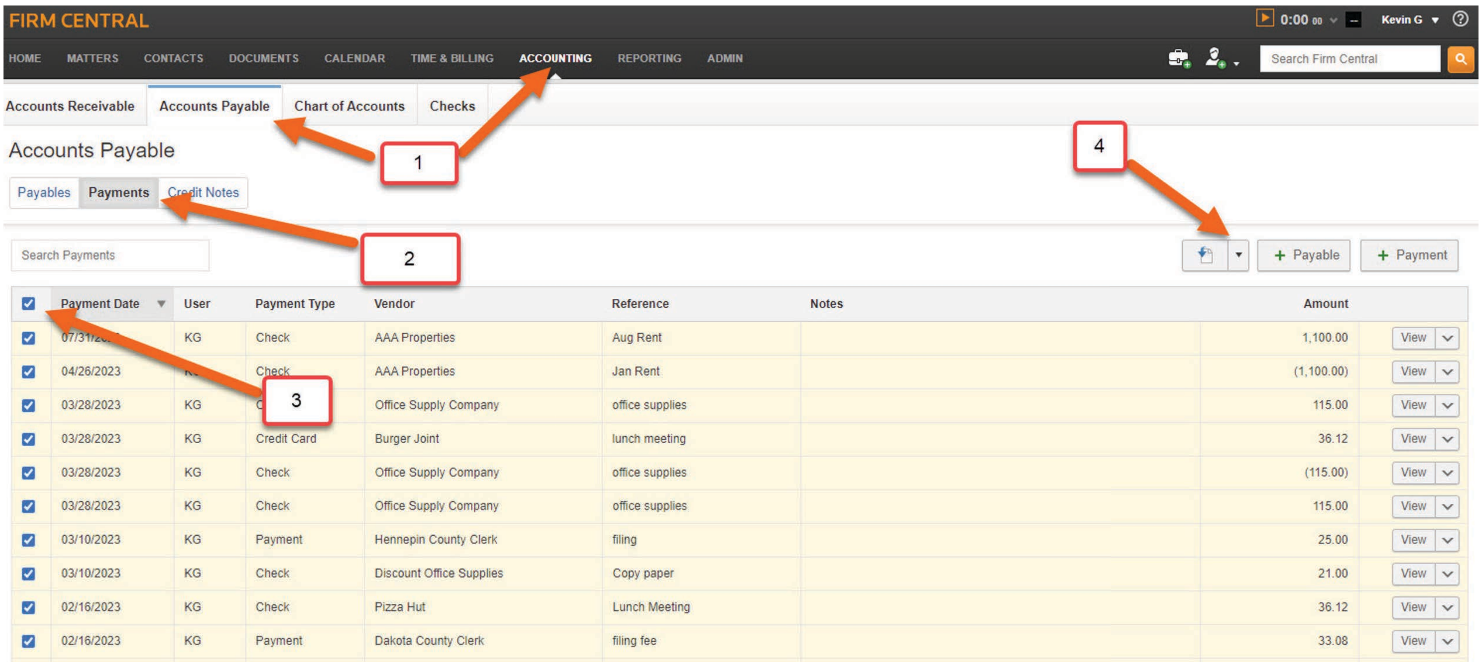


When selecting "Download" a pop-up window will appear, giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the "Download" button to download the information.



The next tab within "Accounts Payable" is the "Payments" Tab.

1. Select "Accounting" from the main menu and then the "Accounts Payable" Tab.
2. Select the "Payments" Sub-tab.
3. Click on the box to the right of the page to "Select All".
4. Click the Export icon or down arrow to download the report. Like the "Payables" download, when selecting "Download" a pop-up window will appear, giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the "Download" button to download the information.



The third and last tab under "Accounts Payable" is the "Credit Notes" Tab.

1. Select "Accounting" from the main menu and then select "Accounts Payable".
2. Click on the "Credit Notes" Sub-tab.
3. There is no option to select all notes or individual notes, so continue by clicking the Export icon or down arrow to begin the download. Like the "Payables" and "Payments" downloads, when selecting "Download" a pop-up window will appear giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the "Download" button to download the information.

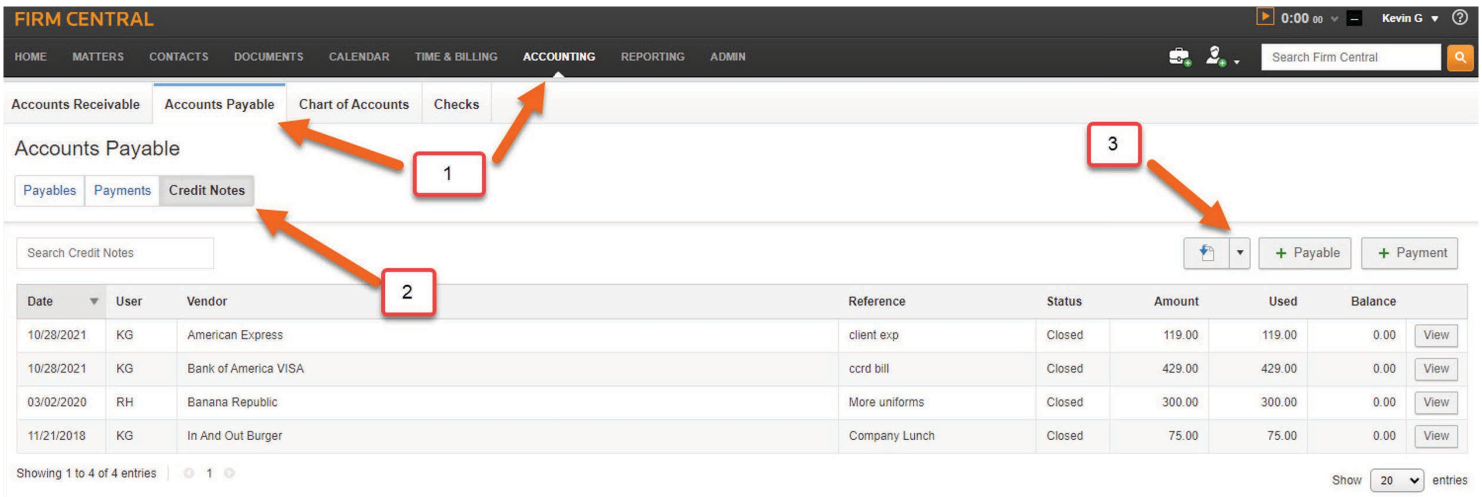
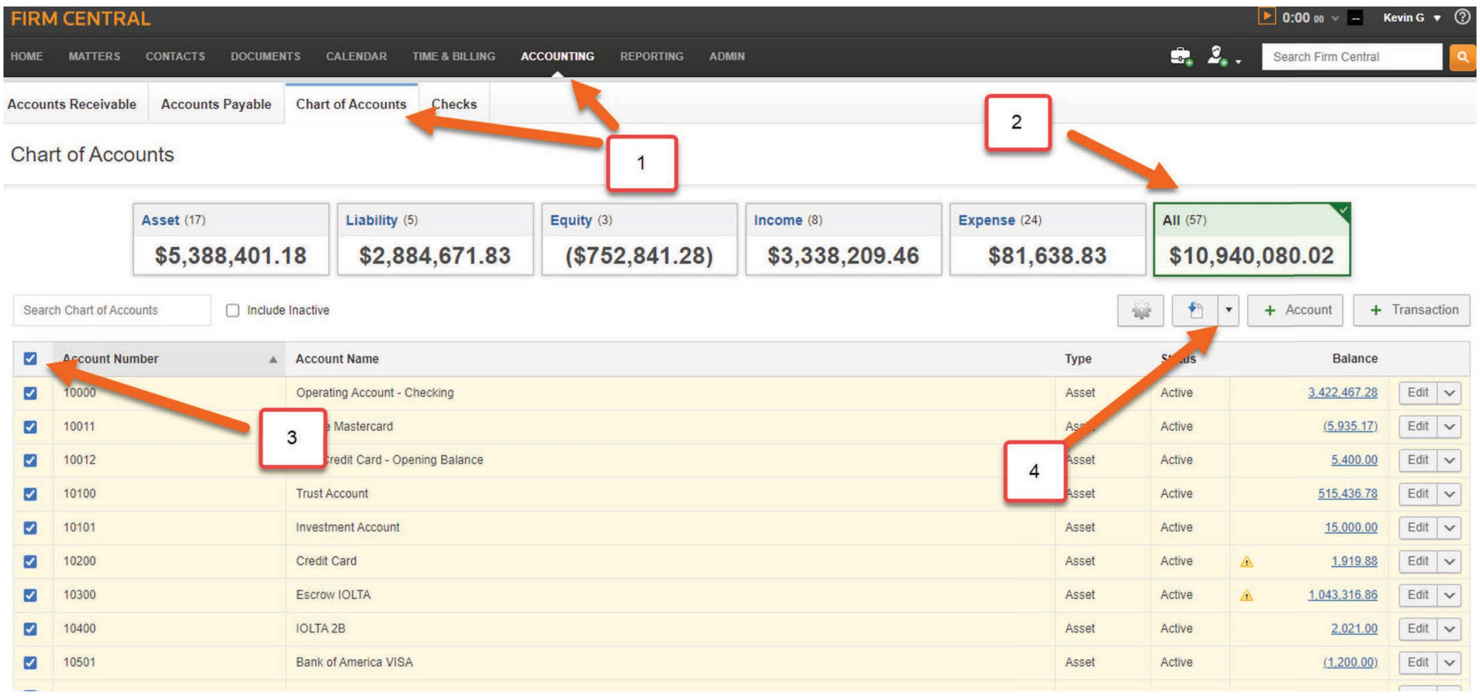


Chart of Accounts Tab:

Data from the Chart of Accounts can be exported following these steps:

1. Select “Accounting” from the main menu and then select “Chart of Accounts”.
2. To capture all the Chart of Accounts data, select the “All” box. You can also select individual account categories, if so desired.
3. Click the “Select All” box on the far left on the page.
4. Click on the Export icon or down arrow to begin the export. Like the “Payables” and “Payments” download, when selecting “Download” a pop-up window will appear, giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the “Download” button to download the information.

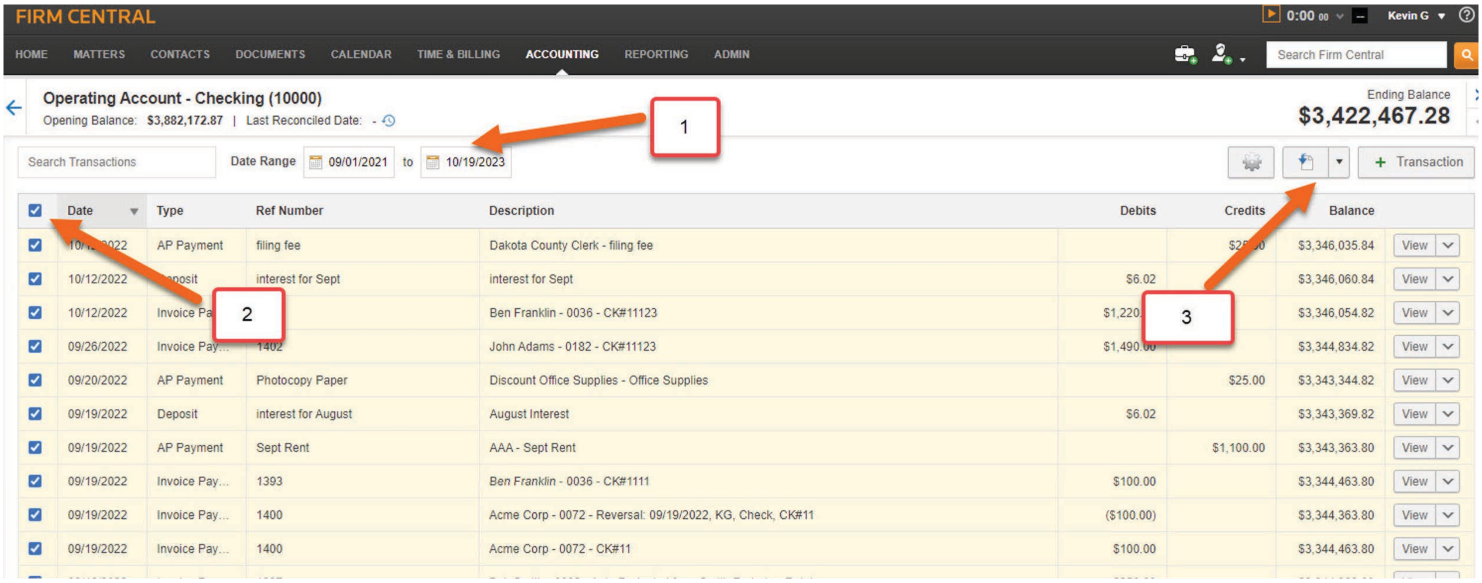


To download or export data from an individual account, click on the account balance (highlighted in blue in the "Balance" column). This will bring you into the individual account.

1. Begin by selecting your date range.

2. Click the "Select All" box on the far left on the page.

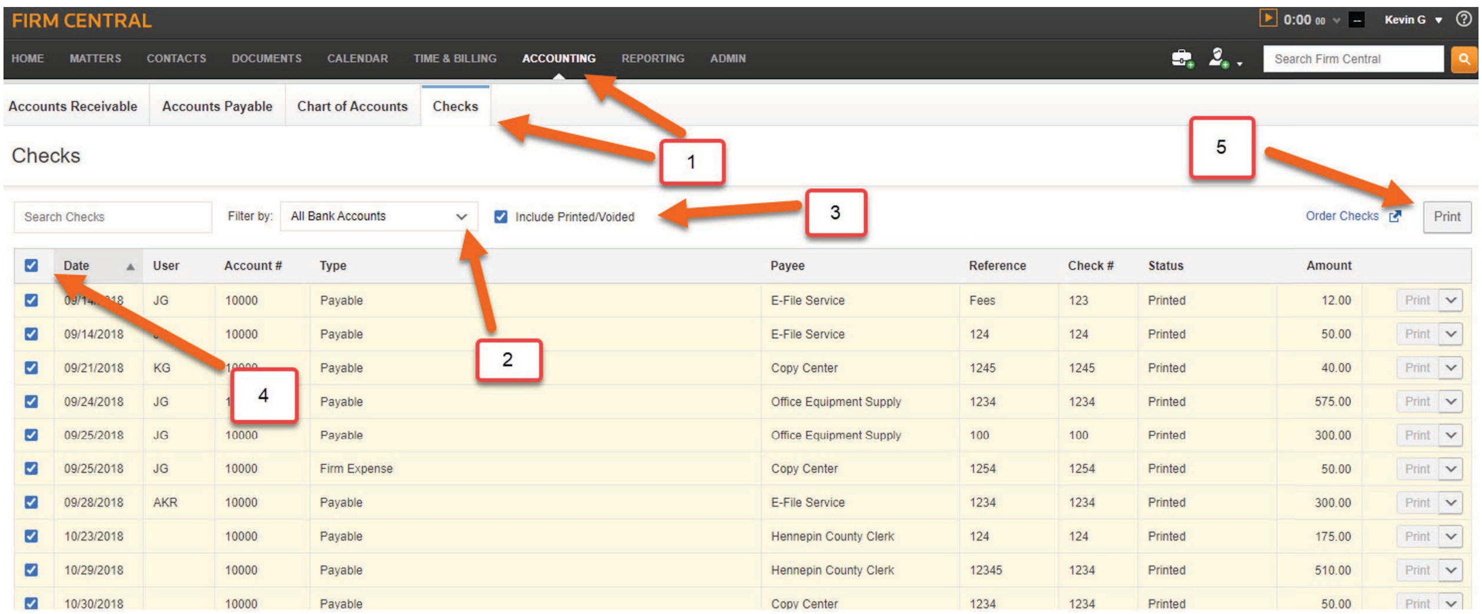
3. Click on the Export icon or down arrow to begin the download. Like the "Payables" and "Payments" download, when selecting "Download" a pop-up window will appear, giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the "Download" button to download the information.



Checks Tab:

To download generated checks, follow these steps:

1. Select "Accounting" from the main menu and then select "Checks".
2. From the "Filter by" drop down menu, select "All Bank Accounts" or individual bank accounts.
3. To download checks that have been printed or voided, check the "Include Printed/ Voided" box.
4. Click on the "Select All" box to include all the checks (optional).
5. Click the "Print" button. Please note, this information is only sent to your printer. However, most printers have an option to create a PDF. We recommend doing this to keep a digital copy of your checks.



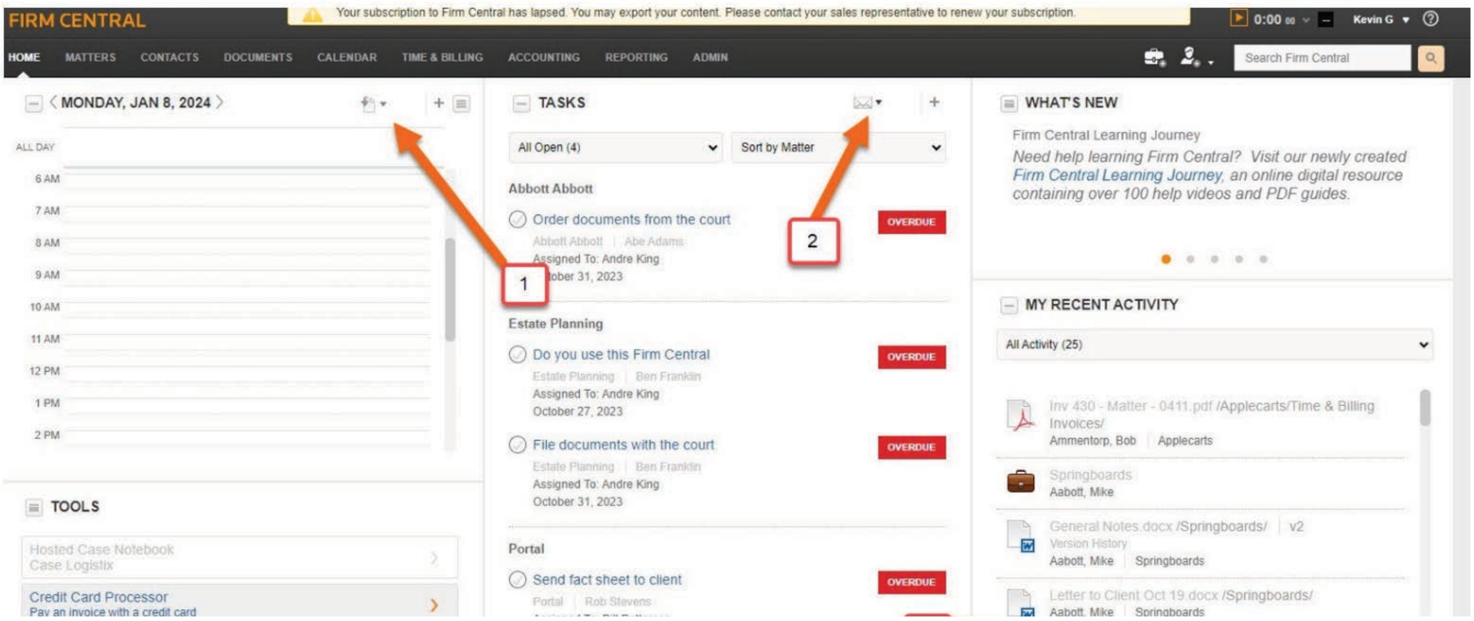
Exporting data from a lapsed Firm Central

This section will provide information on how to export your data from a Firm Central subscription that has been lapsed.

The first thing to note is that you will have 180 days (about 6 months) after the lapse date, to access Firm Central. Your access will be limited, and we shall review that here in this document. We will go page by page in Firm Central describing what data can be exported.

Home Page

Starting with the Home Page, you will first notice a warning message going along the top of every page in Firm Central. This is just to indicate that your subscription has lapsed.



You will be able to export data from:

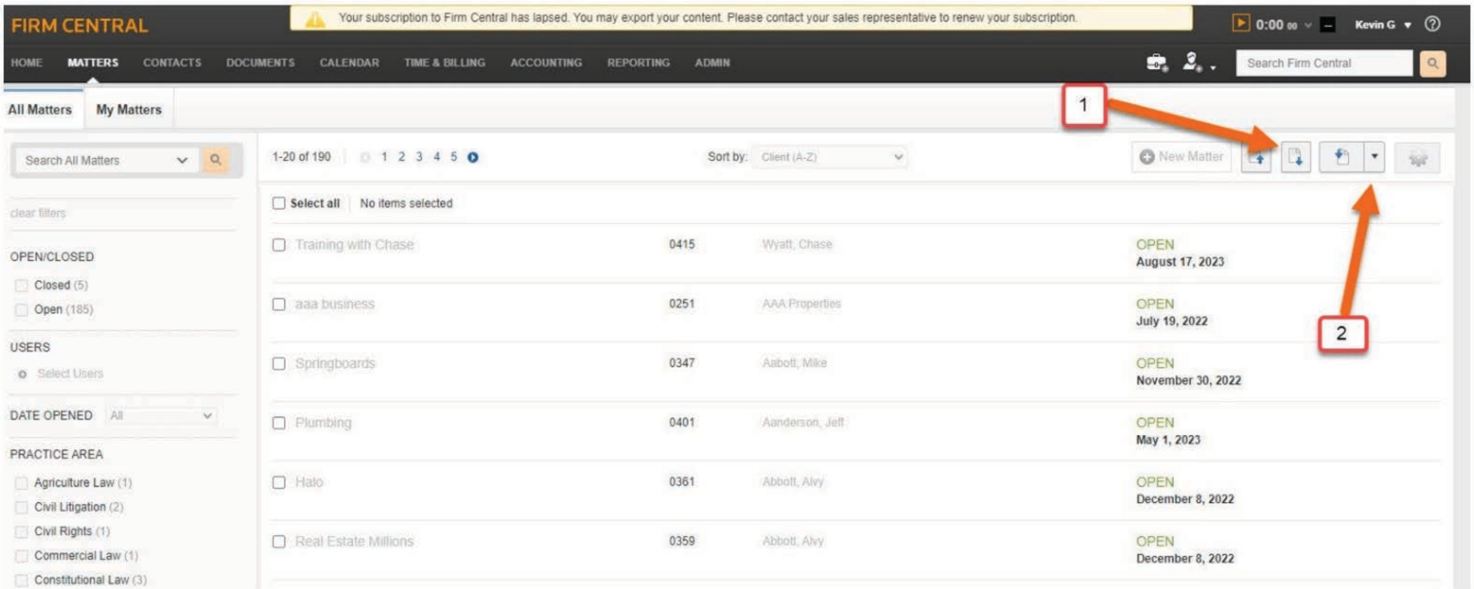
1. The Calendar. Remember, this Calendar Widget is only a one-day snapshot. The export option will be grayed-out if there is no data on the calendar. It is recommended to export data from the main Calendar. This will be outlined further in this document.

2. Tasks

3. Notifications

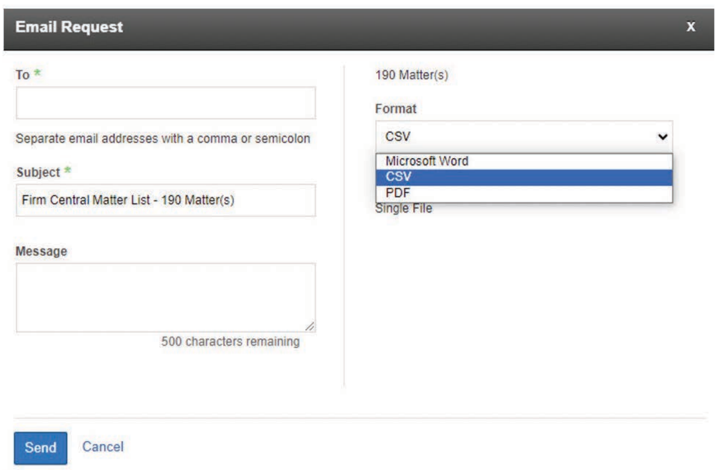
Matters

You will not be able to access individual Matters. That option will be grayed out.



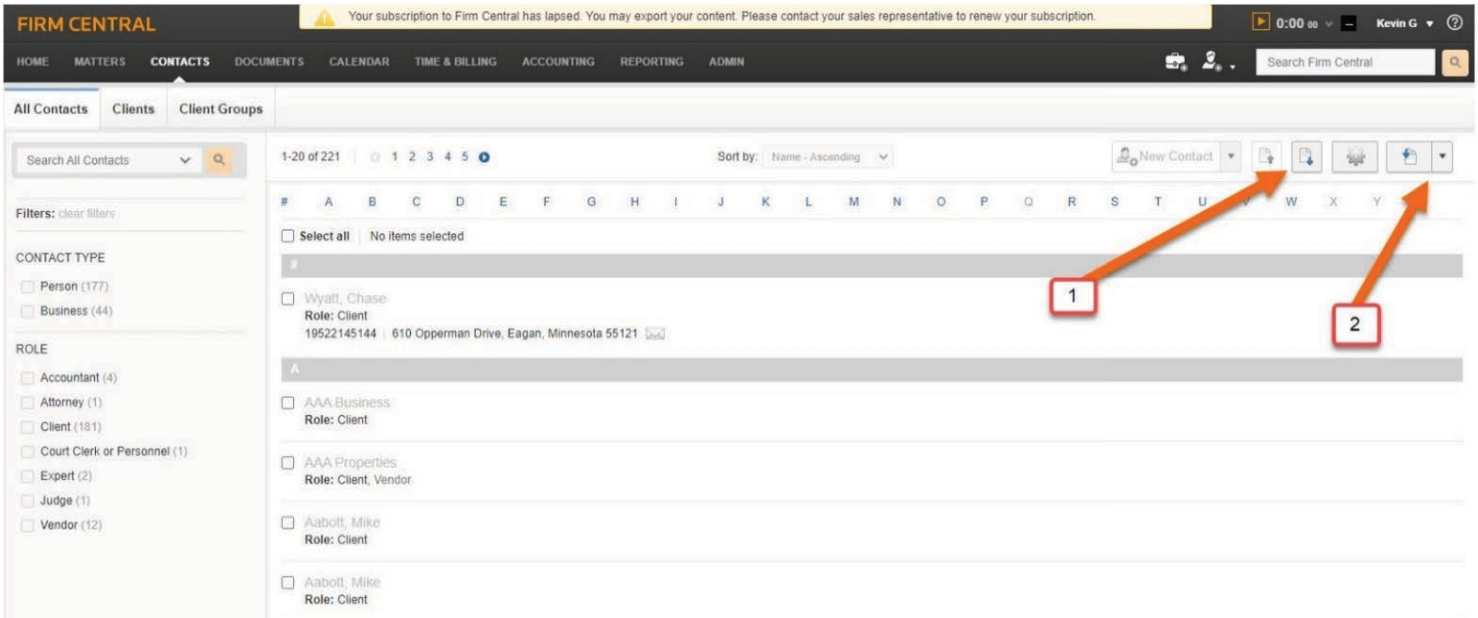
You will be able to export your Matter list in one of two ways:

1. Selecting this menu option will download your Matter list as a .CSV file. The file will contain most, but not all, of the information on the Matter intake.
2. This second option will allow you to export to a .CSV file, like the first option. In addition, you will be able to print or email your Matter list. If you choose to email the Matter list, a pop-up window will appear with a drop down offering the option to email the Matter list as a PDF, CSV or Word document.



Contacts and Clients

Like the Matter Profile, you will not be able to access the Contact and Client Profile. You will be able to export the Contact and Client list as shown below.

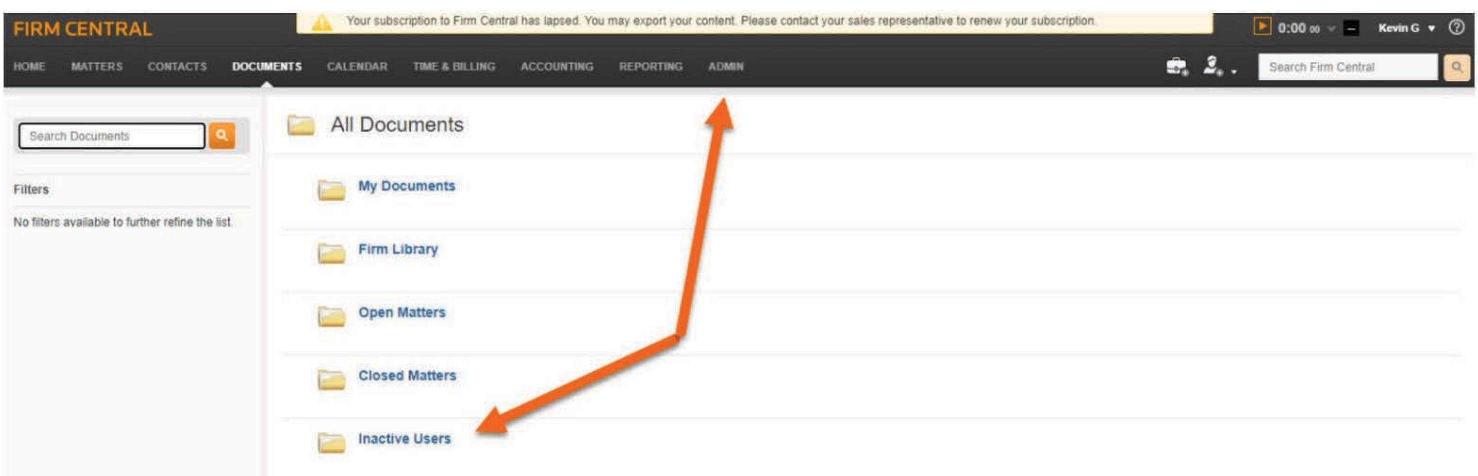


1. Selecting this menu option will download your Contact and Client list as a .CSV file. The file will contain most, but not all, of the information on the Contact and Client intake form.

2. This second option will allow you to export to a .CSV file, like the first option. In addition, you will be able to print or email your Contact and Client list. If you choose to email the list, a pop-up window will appear with a drop down offering the option to email the list as a PDF, CSV, or Word document.

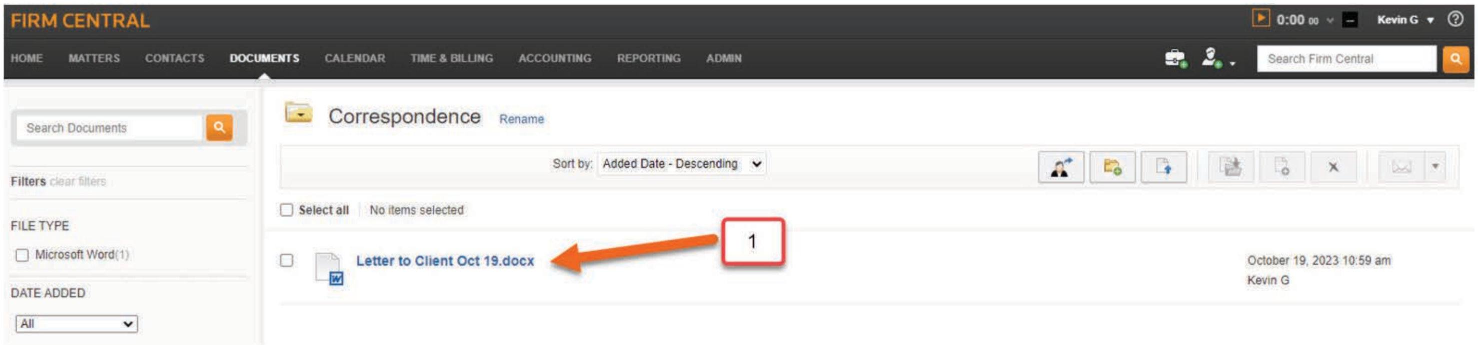
Documents

The Documents Tab will have full access to all documents, including the ability to run the search option. Please note that you must be logged in as Admin to access the "My Documents" folder for any inactive user.

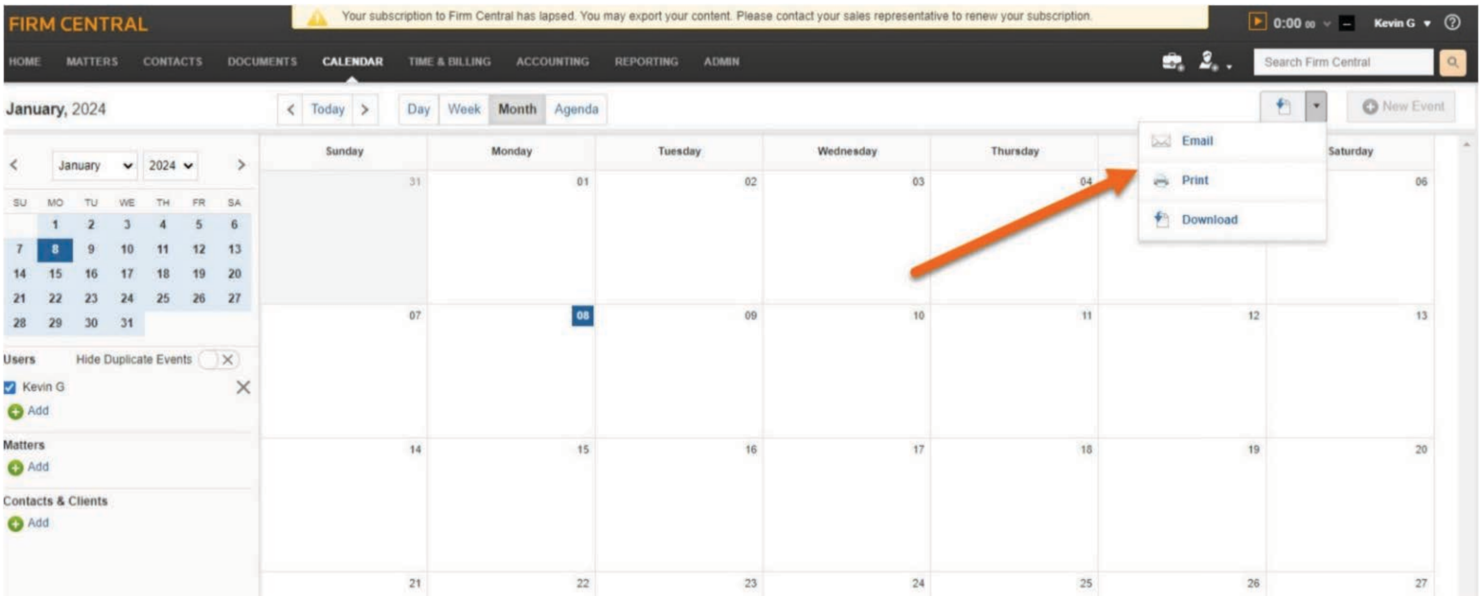


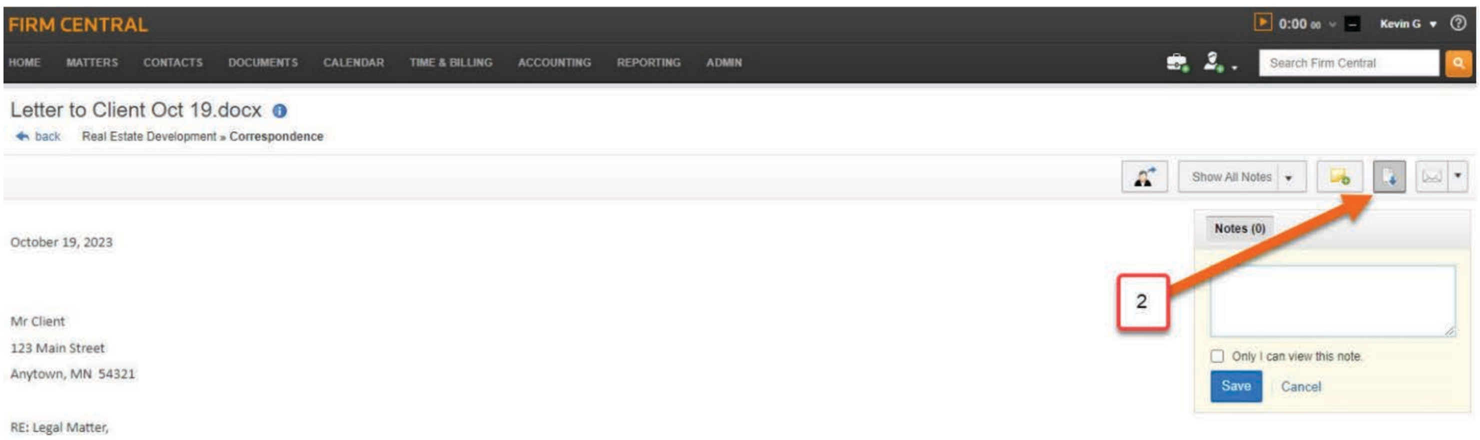
To download an individual document, drill down into the folder to the document you want to download.

1. Select the individual document by clicking on the document name highlighted in blue.

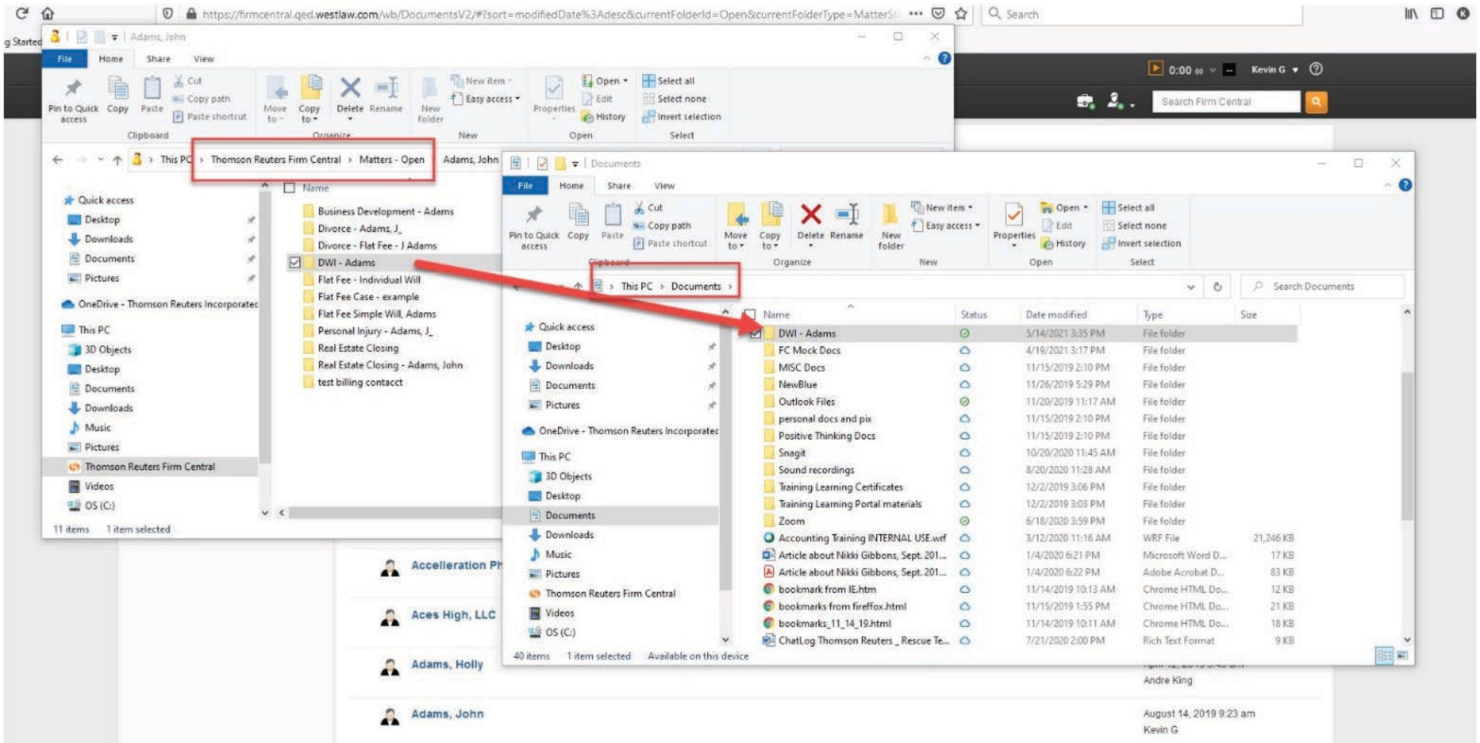


2. Then, in the upper right corner click on the export icon. Your document will be downloaded in its original format





If you have the Desktop software installed, you will be able to drag and drop documents from Firm Central using the Windows File Explorer. The best method is to use Windows File Explorer. You do need to have the Desktop App installed to use this feature. With this, you can open two file explorers and copy or drag-and-drop from one (Firm Central) to another (your own computer). You will need to drill down to the Matter and copy that folder. You can copy entire folders, which will have sub folders and files. Please note that the Desktop App is only available for PC computers. If you have many files that need to be exported from Firm Central to your machine, we recommend that you export them in chunks (e.g., 100-to-200 at a time), rather than all of them at once.



If you do not have the Desktop Software installed, you can click on this link to download and install. Please note, this software is only compatible with a Windows computer.

http://info.legalsolutions.thomsonreuters.com/software/firm-central/

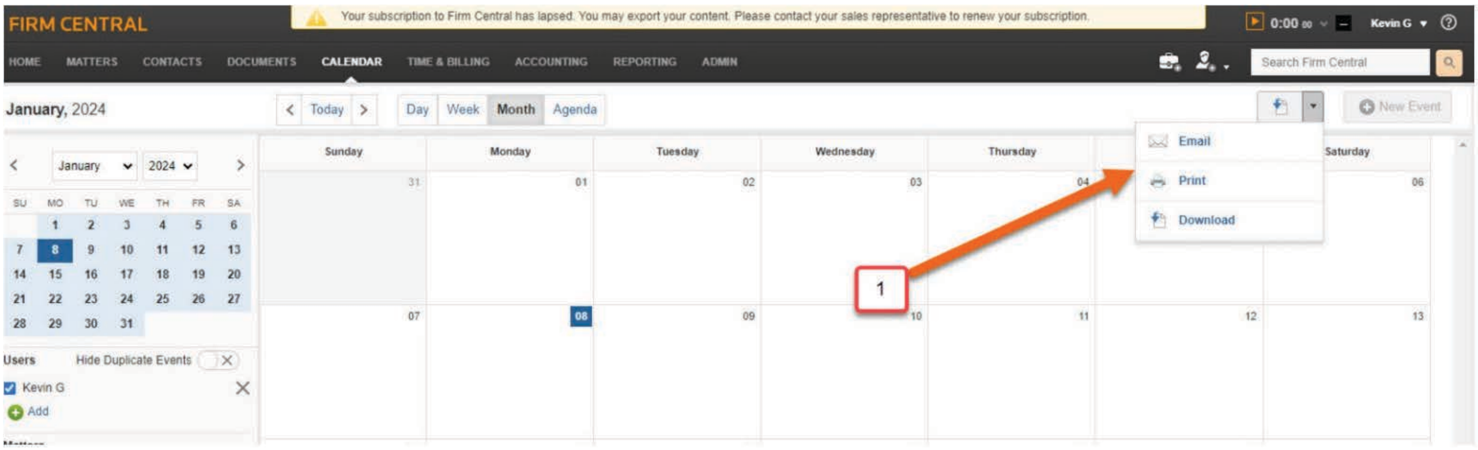
Also, here is a help video with step-by-step instructions to download and install the Desktop Software:

https://answers.legalprof.thomsonreuters.com/firm-central/tx4han2wuet7fah5sri5

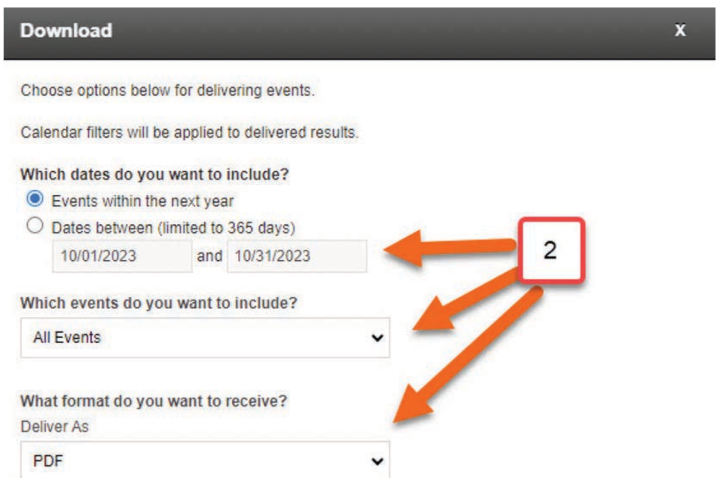
Calendar

You will be able to export your calendar events along with the Deadline Assistant events if you have this in your subscription.

1. In the upper right corner, click on the "Export" button and a pop-up window will appear the options to Email, Print, or Download.



2. You can select a date range to export along with which type of events and the file type. If you have Deadline Assistant, the option to print those events separately is available.



Note: you can only export 365 days at a time, so depending on how long you have used the Firm Central calendar, you may need to run multiple exports. You can run the export in different file types; however, you should export at least one file type as a .CSV file. Most practice management software import/exports require .CSV files. This will allow you to import your Calendar data into another practice management system, provided it is supported.

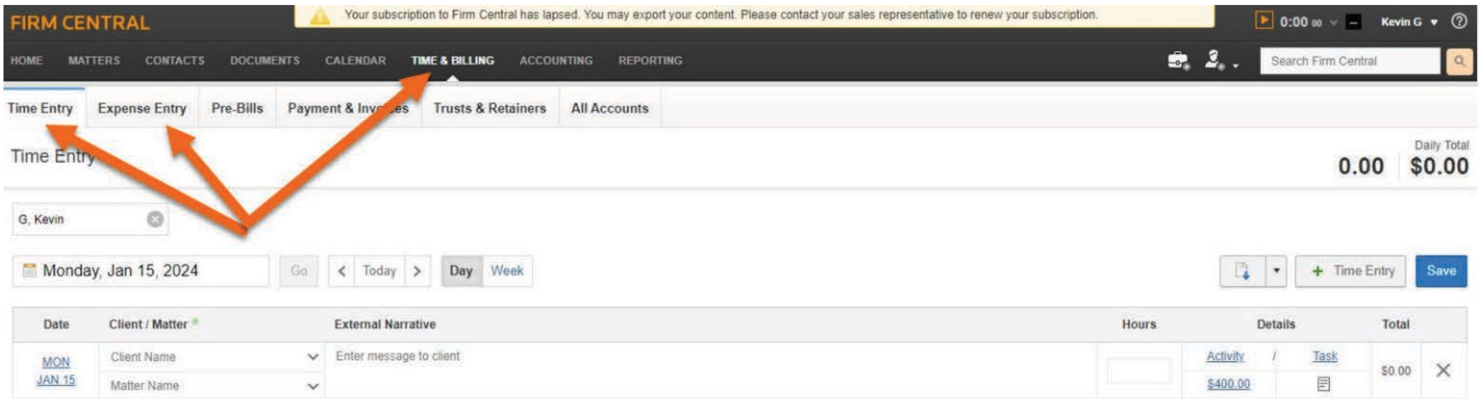
Time & Billing

You will have full functionality of the Pre-Bills page along with the "Payment & Invoices", "Trust & Retainers" and "All Accounts" pages. This will allow you to complete all billing including the ability to close out Trust & Retainer Accounts and print all Account Summary Statements.

Even though certain buttons may work on the "Time Entry" and "Expense Entry" pages, neither will be functional. We will now go through each page. Please note for the sake of brevity, we will not explain "how" to do certain functions, such as "edit a Pre-Bill".

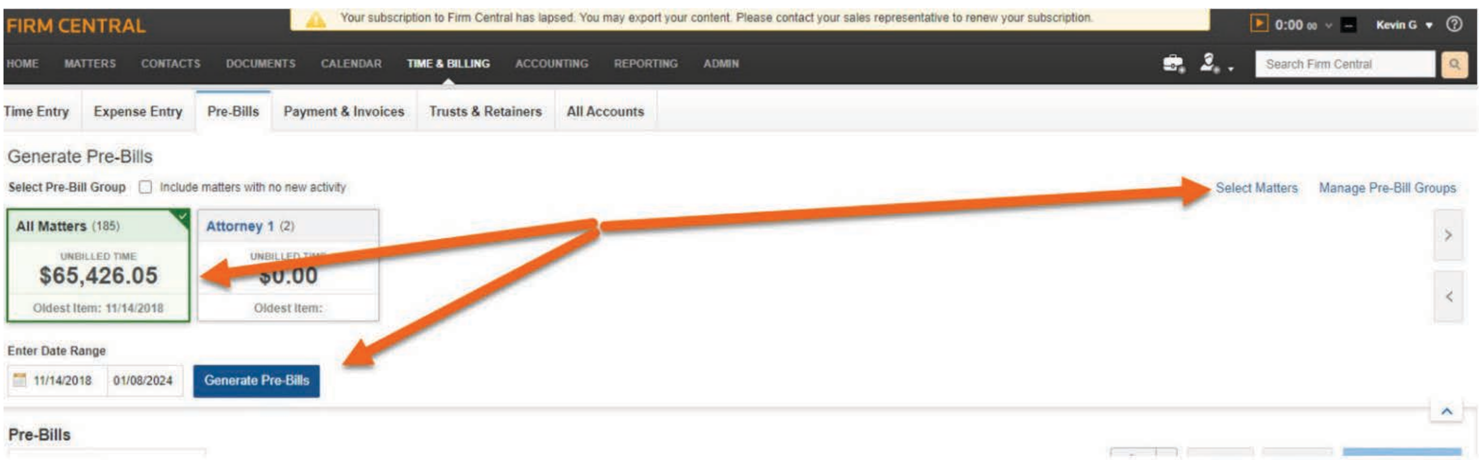
Time Entry and Expense Entry

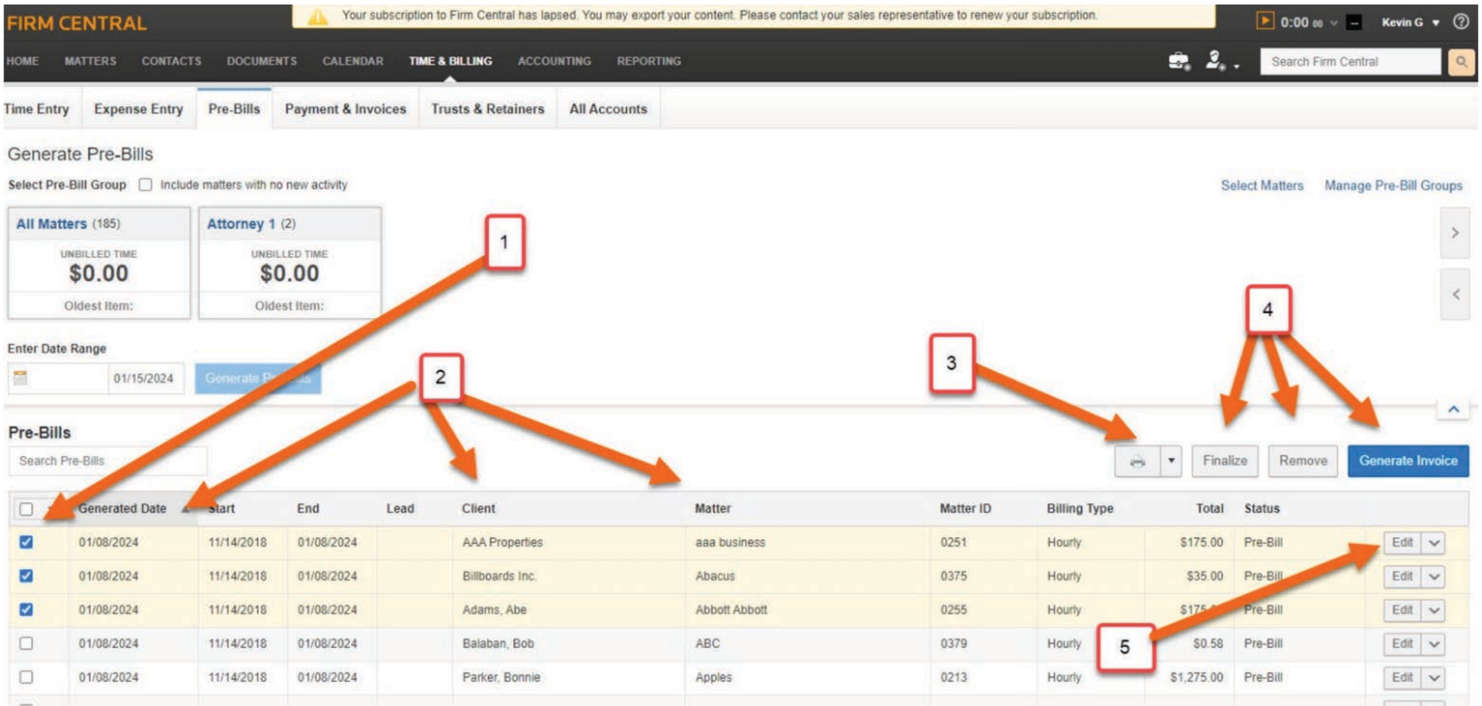
The "Time Entry" and "Expense Entry" Tabs may appear to have active menu options, but these pages are not functional. You can, however, enter time and expense in the Pre-Bill Summary, which we will cover next.



Pre-Bills

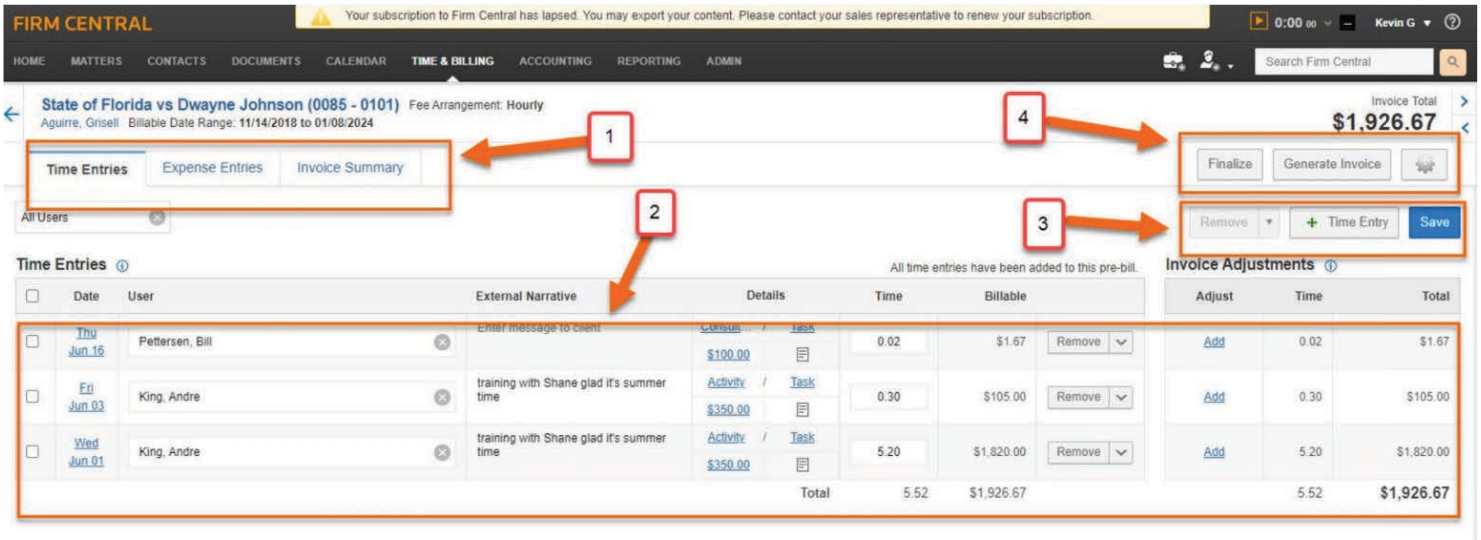
You will have full functionality to generate Pre-Bills whether in a batch or individual selected Matters.





All functions on the Pre-Bills page will remain active, including the ability to:

1. Select Matters.
2. Sort by Date Generated or other column headers.
3. Print or Download.
4. Finalize, Remove, or Generate into an Invoice.
5. Edit.

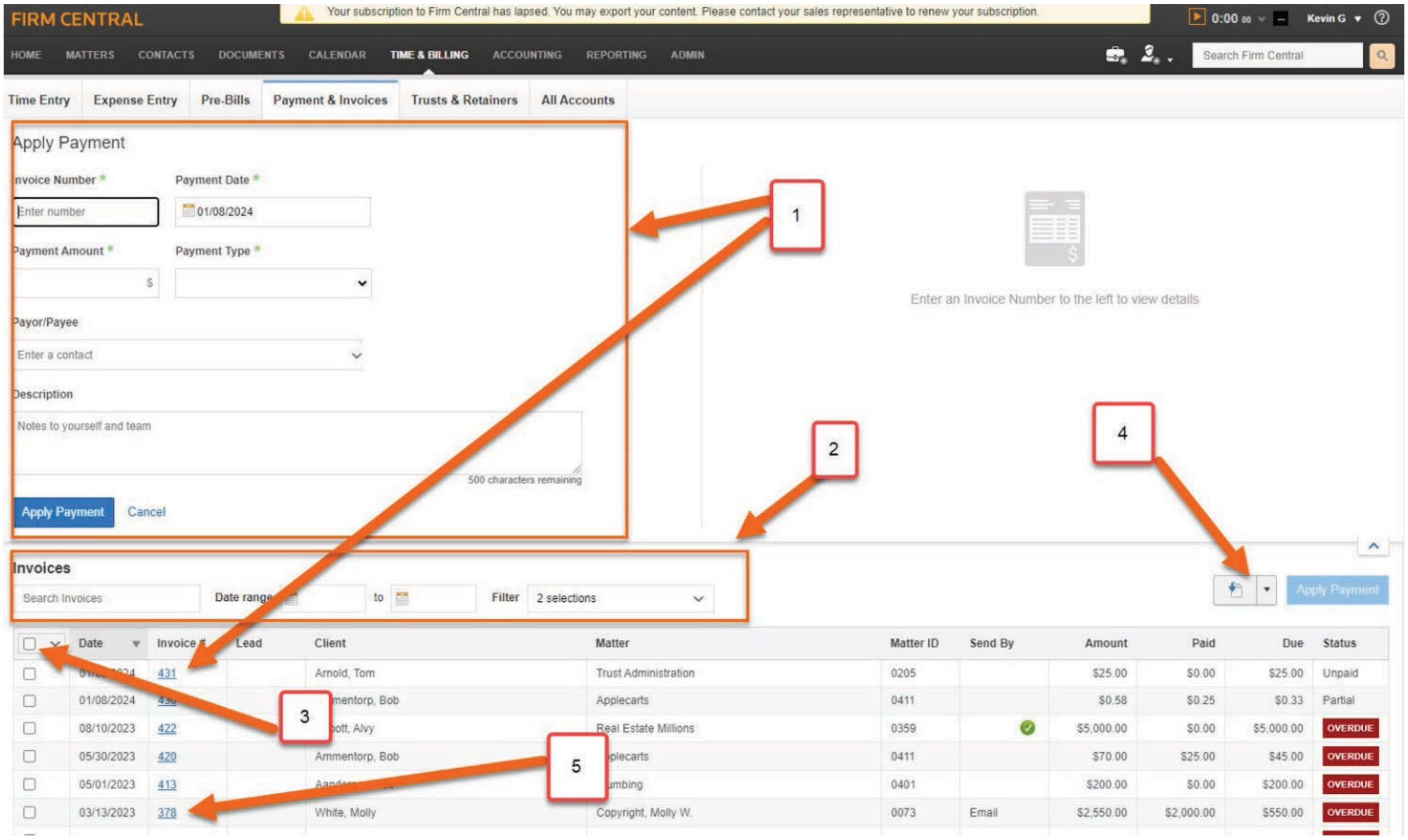


Edit a Pre-Bill

Special attention should be given to this page because it remains fully functional. Meaning, you can:

1. Access Time and Expense Entries along with any edits on the Invoice Summary Page.
2. Edit any Time or Expense Entries, including all functions relating to Adjustments, Removing, and Deleting entries.
3. Add or remove a time or Expense Entry, saving all edits.
4. Finalize, Generate an Invoice, and Write Off or Remove a Pre-Bill.

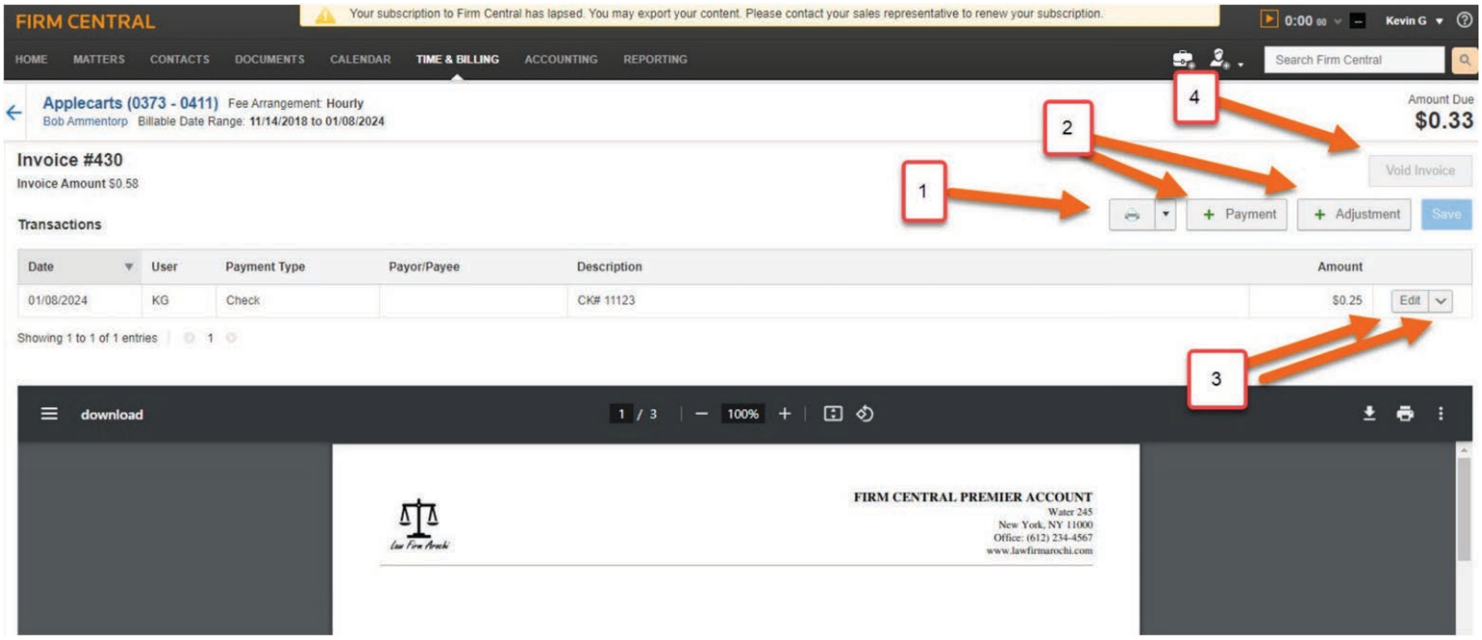
Please note that even though we are not showing the "Expense Entry" page or the "Pre-Bill" Summary page, these pages are fully functional.



Payment & Invoices

The Payment & Invoices page is fully functional. You will have all the ability to:

1. Apply a payment directly on this page or by clicking on the invoice number to load the alternate payments page.
2. Sort and filter.
3. Select invoices.
4. Print, Email, Download, or Export Invoices.
5. Click on the Invoice to access the alternate Invoice page, which we will cover next.

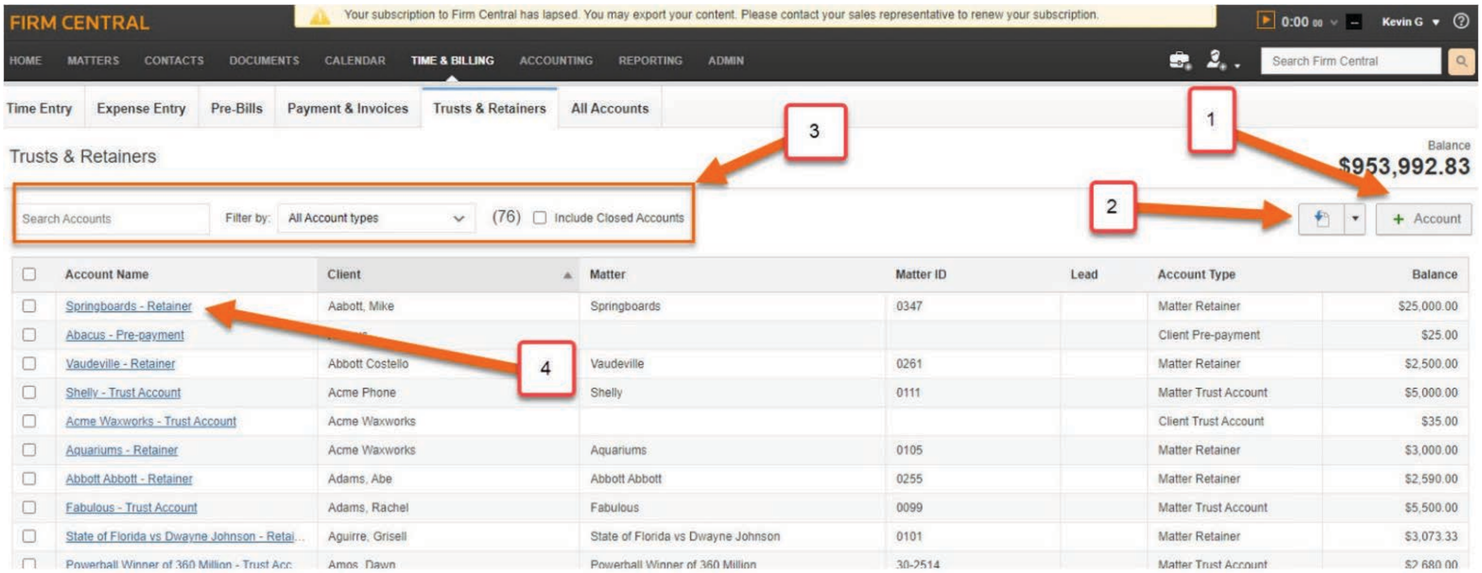


All functions are available on the alternate Invoice page including:

1. Print, Email, or Download.
2. Add a Payment or Adjustment.
3. Edit or reverse the payment.
4. Void an Invoice.

LawPay and Quickbooks Integration:

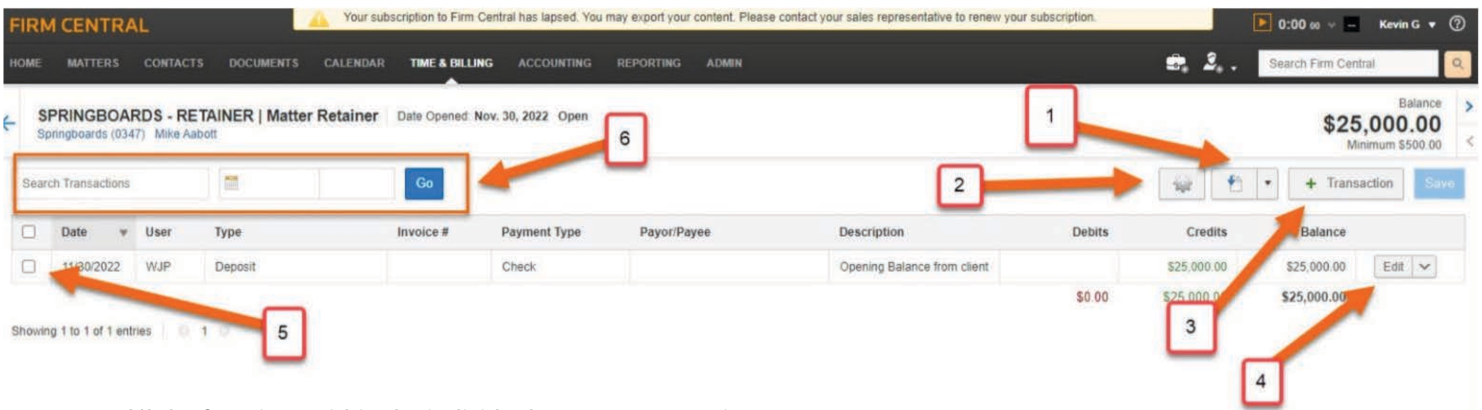
For those customers who have the integration with LawPay and Quickbooks, the integration will still be functional (provided your account with these providers is still active).



Trust & Retainers

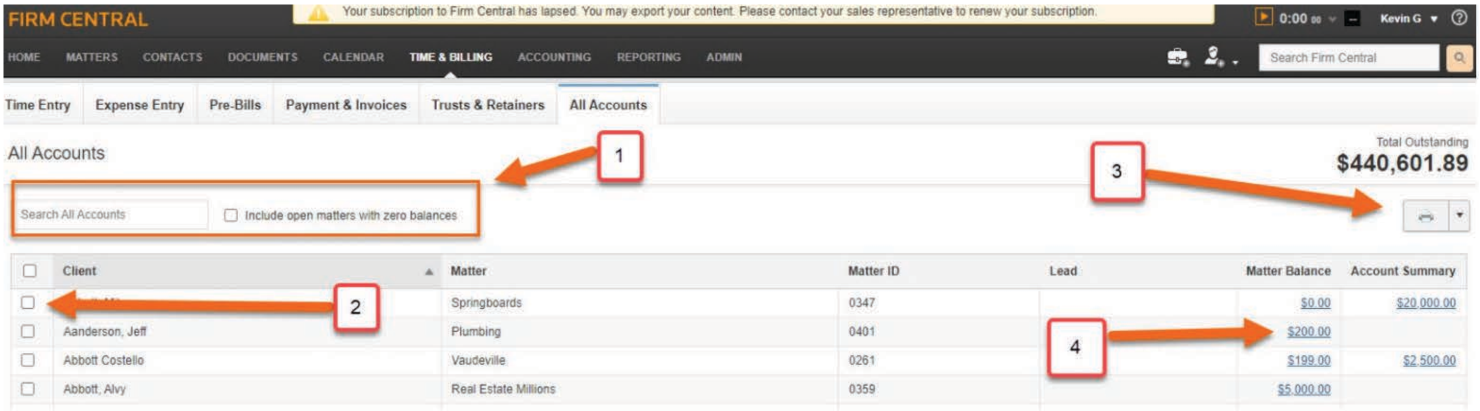
All functions within the Trust & Retainers pages are fully functional, allowing you to make transactions, close accounts, and export data. You will have the ability to:

1. Add an Account.
2. Print, Download, or Export.
3. Use the filter and search options.
4. Click into individual accounts.



All the functions within the individual accounts are active.

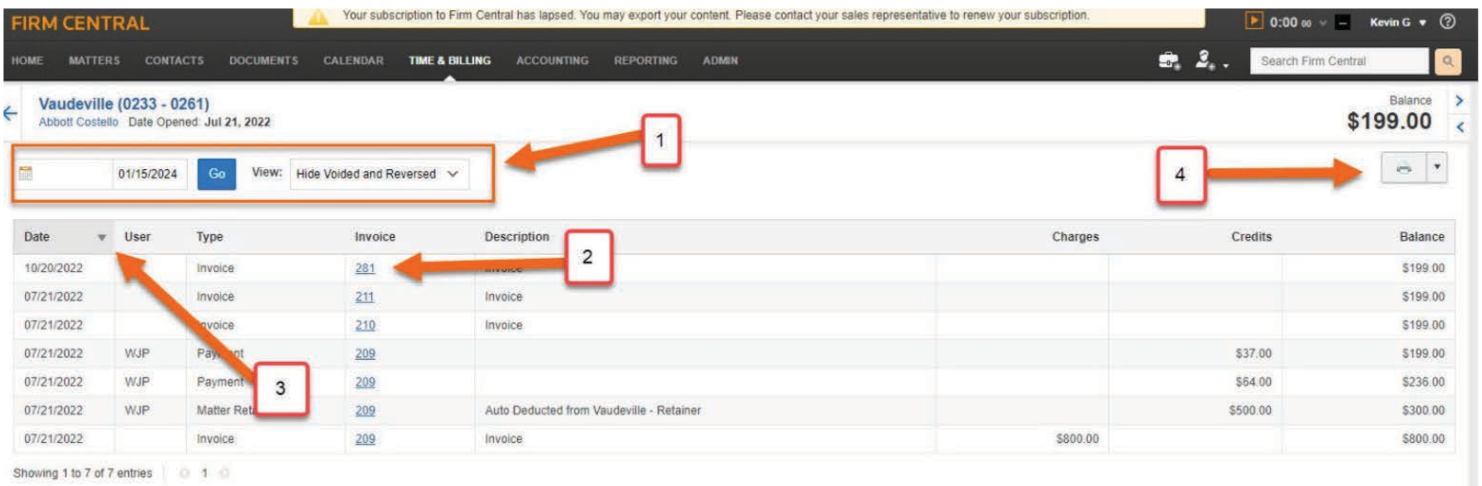
1. Print, Download, or Export.
2. Edit or close.
3. Add a transaction.
4. Edit a transaction.
5. Select transactions.
6. Filter options.



All Accounts

All functions are available in “All Accounts”, including the ability to:

1. Filter.
2. Select.
3. Print, Download, or Export.
4. Select an Individual account.



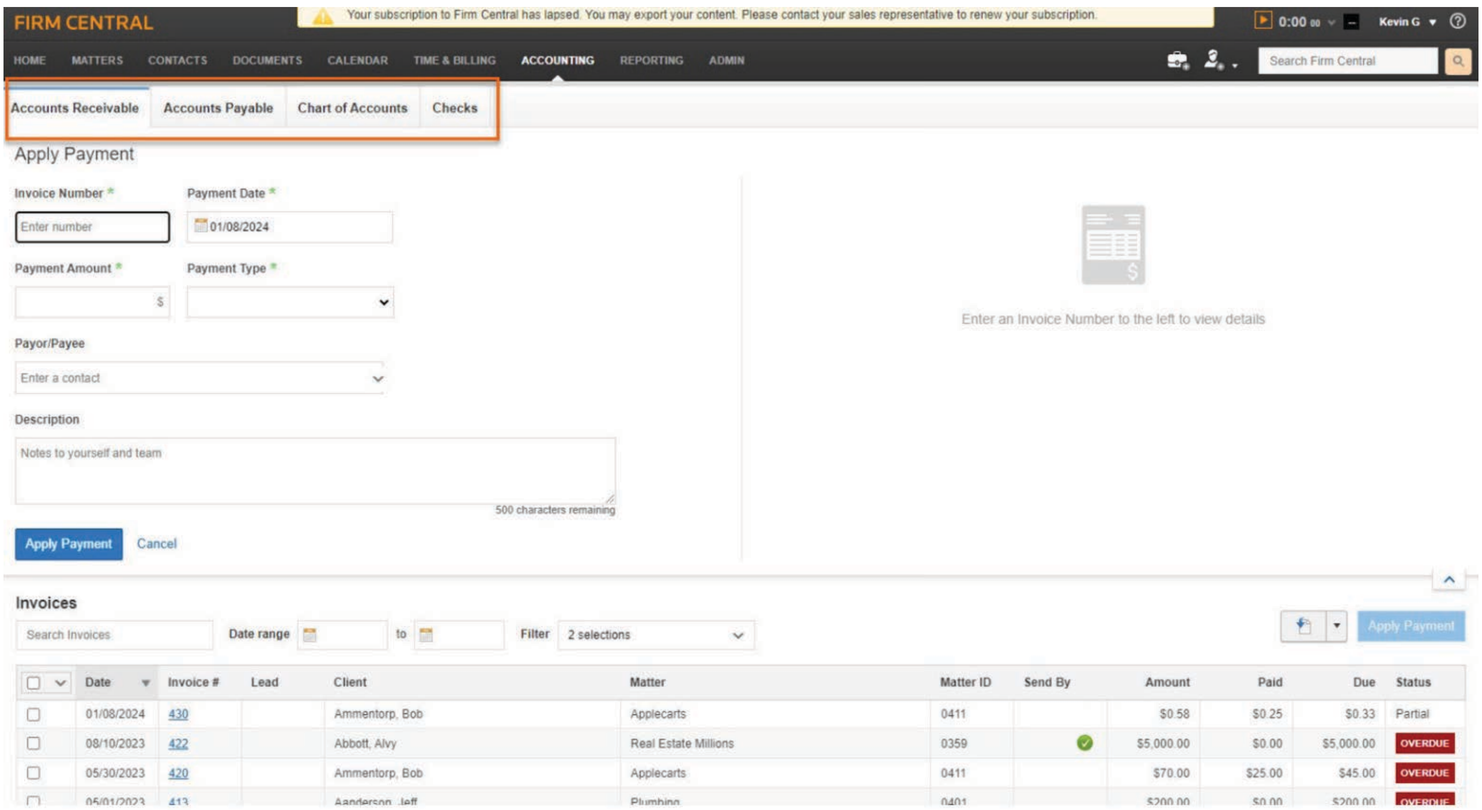
All functions are working within an individual account under “All Accounts”, including:

1. Sort and filter.
2. Select an invoice to view.
3. Sort the Date column.
4. Print or Download.

Accounting

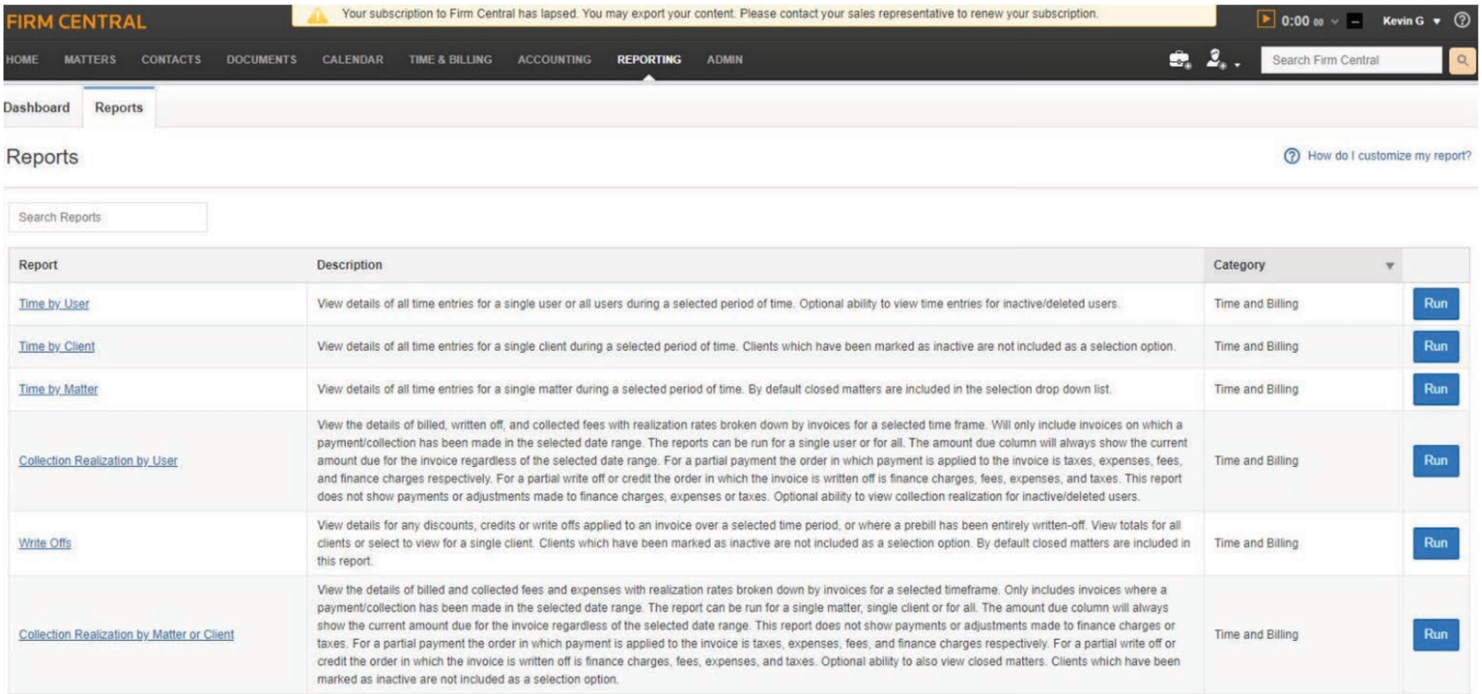
All functions within the Firm Central Accounting Module are fully functional, allowing you to print, download, export, reconcile, add adjustments, and perform other activities. We will now provide a high-level overview of each page. As with the Time & Billing section, we will not go into detail on each page, but rest assured that the Accounting pages are all fully functional. The same access and functionality will be available for those customers who have granted their Accountant access to Firm Central Accounting.

All Accounting tabs and pages are fully functional, allowing you to complete your work and export your data.



Reporting

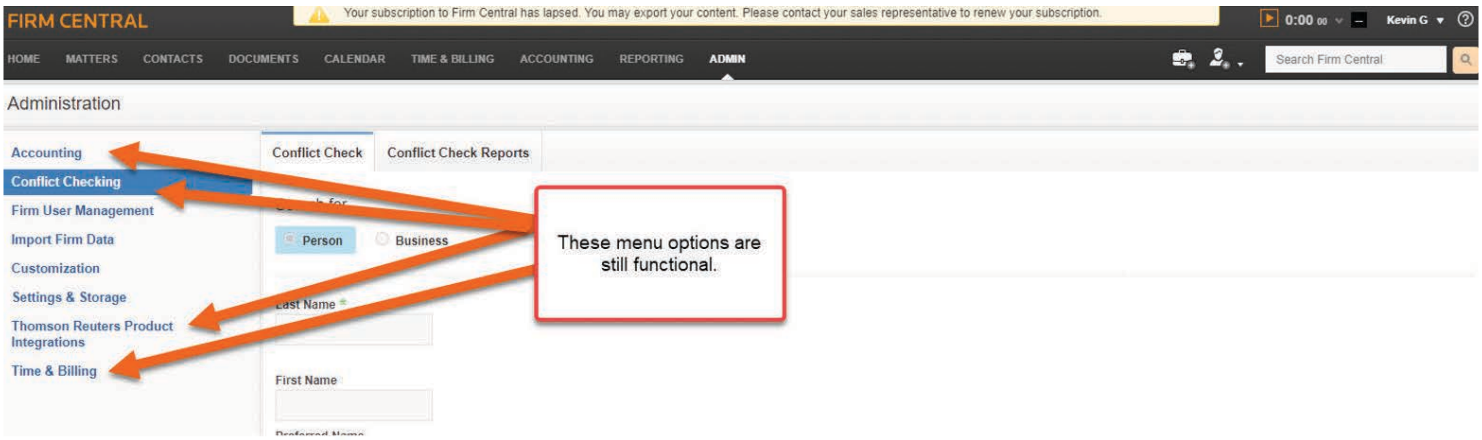
The Reporting page along with Dashboard and Reports are all fully functional, allowing you to export data.



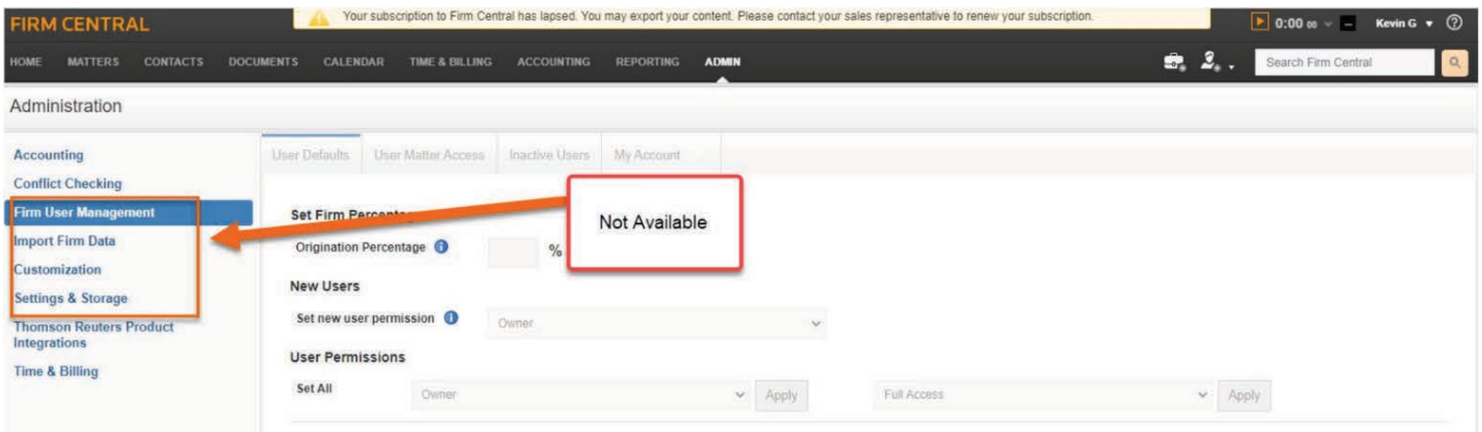
Report	Description	Category	
Time by User	View details of all time entries for a single user or all users during a selected period of time. Optional ability to view time entries for inactive/deleted users.	Time and Billing	Run
Time by Client	View details of all time entries for a single client during a selected period of time. Clients which have been marked as inactive are not included as a selection option.	Time and Billing	Run
Time by Matter	View details of all time entries for a single matter during a selected period of time. By default closed matters are included in the selection drop down list.	Time and Billing	Run
Collection Realization by User	View the details of billed, written off, and collected fees with realization rates broken down by invoices for a selected time frame. Will only include invoices on which a payment/collection has been made in the selected date range. The reports can be run for a single user or for all. The amount due column will always show the current amount due for the invoice regardless of the selected date range. For a partial payment the order in which payment is applied to the invoice is taxes, expenses, fees, and finance charges respectively. For a partial write off or credit the order in which the invoice is written off is finance charges, fees, expenses, and taxes. This report does not show payments or adjustments made to finance charges, expenses or taxes. Optional ability to view collection realization for inactive/deleted users.	Time and Billing	Run
Write Offs	View details for any discounts, credits or write offs applied to an invoice over a selected time period, or where a prebill has been entirely written-off. View totals for all clients or select to view for a single client. Clients which have been marked as inactive are not included as a selection option. By default closed matters are included in this report.	Time and Billing	Run
Collection Realization by Matter or Client	View the details of billed and collected fees and expenses with realization rates broken down by invoices for a selected timeframe. Only includes invoices where a payment/collection has been made in the selected date range. The report can be run for a single matter, single client or for all. The amount due column will always show the current amount due for the invoice regardless of the selected date range. This report does not show payments or adjustments made to finance charges or taxes. For a partial payment the order in which payment is applied to the invoice is taxes, expenses, fees, and finance charges respectively. For a partial write off or credit the order in which the invoice is written off is finance charges, fees, expenses, and taxes. Optional ability to also view closed matters. Clients which have been marked as inactive are not included as a selection option.	Time and Billing	Run

Administrative Menu

There should not be a need to make global edits in the Administrative Menu. However, if you do, there is some limited ability to do so. The Administrative Menu options that are still functional are Accounting, Conflict Checking, Product Integration, and Time & Billing including all the sub tabs.

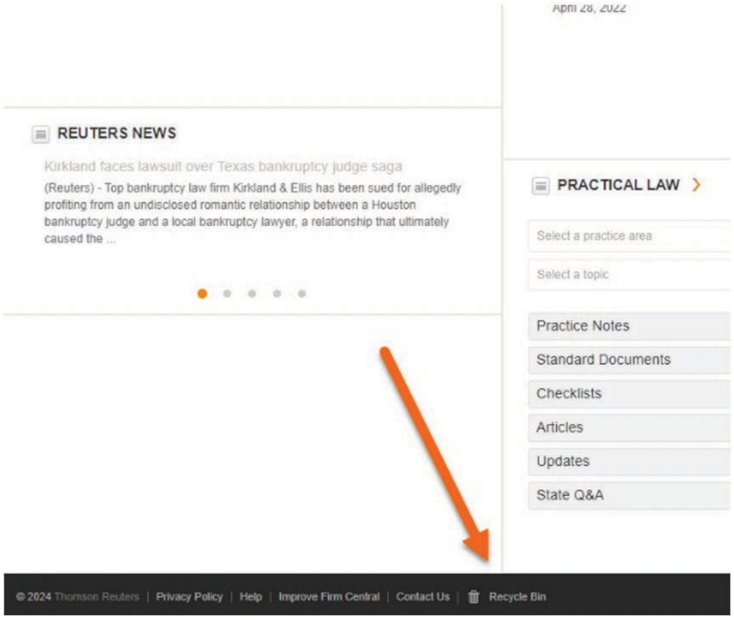


Firm User Management, Import Firm Data, Customization, and Settings & Storage are all nonfunctional.

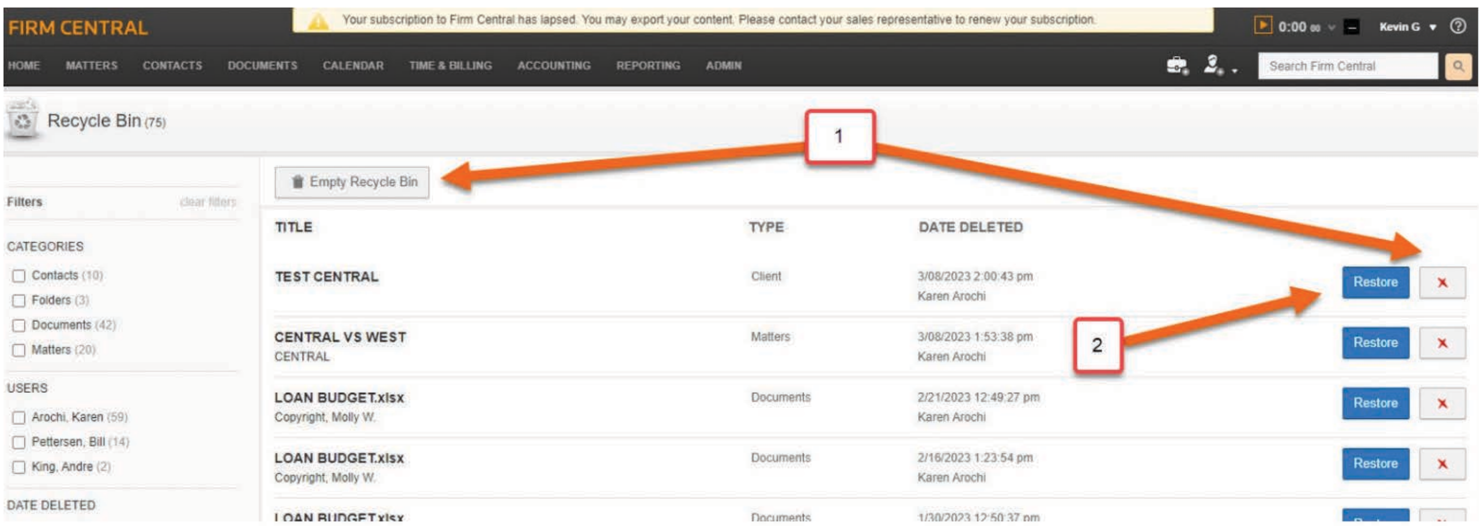


Recycle Bin

Lastly, the Recycle Bin is fully functional. This option is found on the bottom of every page.



Any user can "Restore" a document. However, you need to be logged in as Administrator to Empty the Recycle Bin or Delete items.



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