

# Firm Monthly Billing Recap



THOMSON REUTERS

## Using your Custom Report:

Suggestions for running the Firm Monthly Billing Recap report:

- Detail Line: 1/1/XX – 12/31/XX – Entire Year \*
- Detail Line 2: 1/1/XX – 12/31/XX – Entire Year \*
- Detail by: Staff, Client, etc.

\*Must have all period created for the date range entered, otherwise the column headings will display incorrectly.

Practice CS - [200822Sample] - [Print Reports]

File Edit View Actions Setup Tools Help

Back Add

**Firm**

Actions

- Dashboard
- Print Reports
- Print Labels & Letters
- Change Periods

Setup

- Firm
- Offices
- Office Custom Fields
- Departments
- Bank Accounts
- Security Groups
- Activities
- Activity Categories
- Activity Custom Fiel...
- Contact Categories
- Standard Text
- Custom Formats

**Firm**

- Staff
- Clients

**Print Reports**

Lists

- Activities
- Activity Categories
- Client Groupings
- Client/Engagement
- Clients
- Contacts
- Departments
- Engagement Categories
- Entities
- Staff Billing Rates
- Staff Groupings
- Staff Levels
- Standard Text

**Production**

- Calendarized Activity
- Production Analysis
- Profit Report
- Time and Expense Journal
- Time and Expense Listing
- Wendell Walker Firm Prod
- Work-in-Process Summary

**Billing**

- Billed Tax Summary
- Billing Analysis
- Billing Worksheet
- Detail Worksheet
- Firm Monthly Billing Recap
- Invoice Journal

**Collection**

- Accounts Receivable Applications
- Accounts Receivable Ledger
- Accounts Receivable Summary
- Collection Summary

Selected Reports

Firm Monthly Billing Recap

Remove

Identification

Description: Firm Monthly Billing Recap

Report Options

Selection Layout

Group by: <None> Sort on: <None> Direction: Ascending Page Breaks:

Group by: <None> Sort on: <None> Direction: Ascending Page Breaks:

Group by: <None> Sort on: <None> Direction: Ascending Page Breaks:

Detail by: Staff ID Ascending

Print Cover Sheet

Preview Selected Print Selected

For Help, press F1 Current Login: CAG Current Period: 09/01/2009 - 09/30/2009

Practice CS - [200822Sample] - [Preview]

File Edit View Actions Setup Tools Help

Back Add

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**Firm**

- Staff
- Clients

**Hackney & Carter CPA's**

**Firm Monthly Billing Recap by Detail by: Staff**

January 1, 2007 - December 31, 2007  
January 1, 2008 - December 31, 2008

	Jan 07	Feb 07	Mar 07	Apr 07	May 07	Jun 07	Jul 07	Aug 07	Sep 07	Oct 07	Nov 07	Dec 07	
	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	Dec 08	Totals
<b>CAG Goodman, Catherine</b>													
Hours\Units	23.50	21.45	23.00	20.90	23.25	26.55	22.75	23.40	23.25	25.95	20.75	23.65	278.40
Amount:	1,740.00	2,090.00	2,090.00	2,090.00	2,090.00	2,090.00	2,090.00	2,090.00	2,090.00	2,090.00	2,090.00	2,090.00	24,730.00
Hours\Units	56.54	31.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	75.00	0.00	163.44
Amount:	4,891.40	2,837.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,000.00	0.00	12,728.74
<b>JAB Bailey, Jennifer</b>													
Hours\Units	38.30	27.45	25.40	33.85	26.20	26.65	27.80	26.40	27.80	29.90	27.70	27.85	345.30
Amount:	2,245.00	2,370.00	1,895.00	2,770.00	1,895.00	1,895.00	1,895.00	1,895.00	1,895.00	1,895.00	1,895.00	1,895.00	24,440.00
Hours\Units	60.01	38.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	98.76
Amount:	4,826.20	3,441.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100.00	0.00	8,367.88
<b>SLC Carter, Steve</b>													
Hours\Units	31.10	28.30	42.05	33.95	20.10	21.15	23.10	20.05	22.90	26.90	28.65	26.15	324.00
Amount:	2,150.00	3,250.00	4,630.00	2,965.00	2,125.00	2,125.00	2,135.00	2,135.00	2,135.00	2,165.00	2,865.00	2,165.00	30,845.00
Hours\Units	5.25	32.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.85
Amount:	426.50	2,536.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,963.36
<b>WCH Hackney, William</b>													
Hours\Units	8.30	4.25	10.85	4.15	4.50	31.85	33.90	88.70	44.65	23.70	31.00	27.60	313.45
Amount:	785.00	525.00	1,430.00	525.00	525.00	5,525.00	5,525.00	4,525.00	11,525.00	5,525.00	3,525.00	4,525.00	41,465.00
Hours\Units	42.00	26.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	68.70
Amount:	5,700.90	3,770.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9,471.27
<b>Report Totals</b>													
Hours\Units	101.20	81.45	101.30	92.85	74.05	106.20	107.55	158.55	118.20	106.45	108.10	105.25	1,261.15
Amount:	6,920.00	8,235.00	10,045.00	8,350.00	6,635.00	11,635.00	10,645.00	17,645.00	11,645.00	8,675.00	10,375.00	10,675.00	121,460.00
Hours\Units	163.80	129.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	75.00	0.00	368.75
Amount:	15,845.00	12,586.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,100.00	0.00	33,531.25

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