

Firm Monthly Productivity Recap



THOMSON REUTERS

Suggestions for running the Firm Monthly Productivity Recap report:

- Detail Line: 1/1/XX – 12/31/XX *Screen Shot: 1*
- Filter for Only Time Entries (option 1) or split the Time Entries and Expense Entries (option 2)
 - Option 1 – Filtering Activity|Filter|Time Entries *Screen Shot: 2a & b*
 - Option 2 – Group by: Activity Type *Screen Shot: 3*

Screen Shot 4 shows Option 1

Screen Shot 5 shows Option 2

Screen Shot: 1

Practice CS - [200820Sample] - [Print Reports]

File Edit View Actions Setup Tools Help

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Print Reports

Lists

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

Production

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

Select

Selected Reports

- Wendell Walker Firm Prod

Remove

Identification

Description: Wendell Walker Firm Prod

Report Options

Selection Layout

Dates

Report date: End-of-Period Date 11/30/2008

Detail line: Custom Date Range 1/1/2008 To 12/31/2008

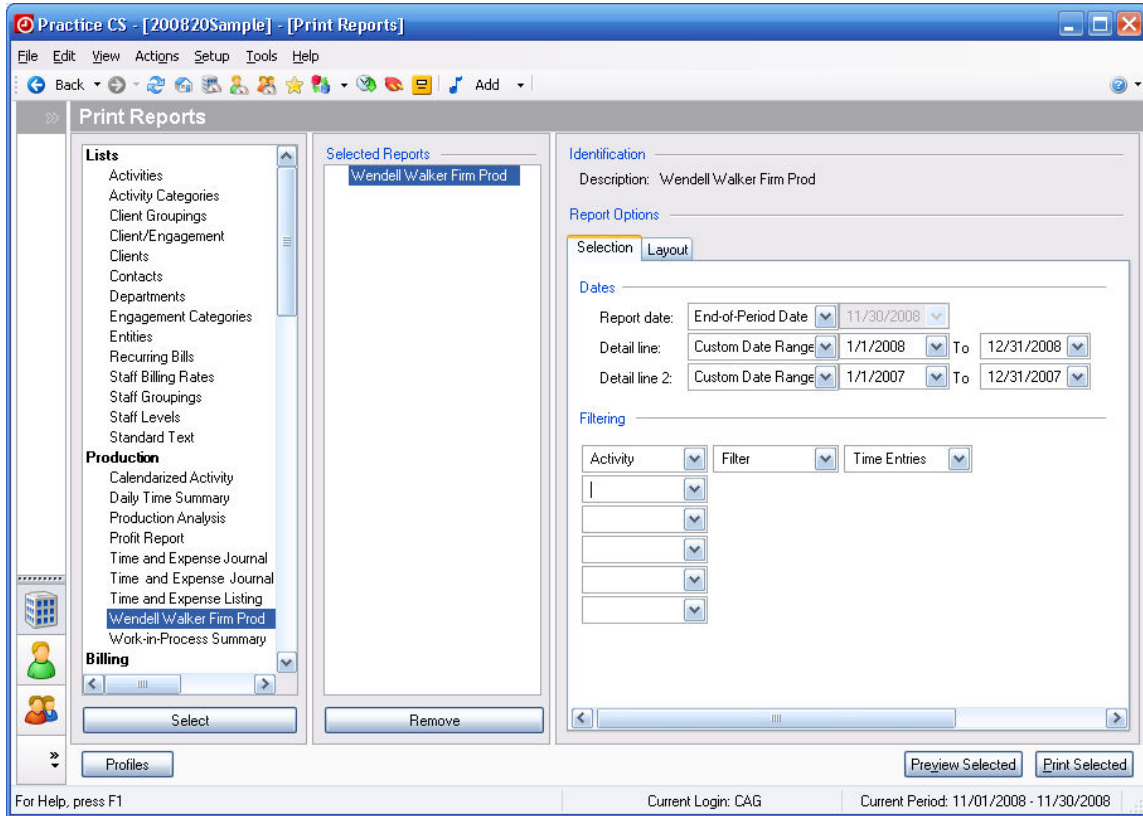
Detail line 2: Custom Date Range 1/1/2007 To 12/31/2007

Filtering

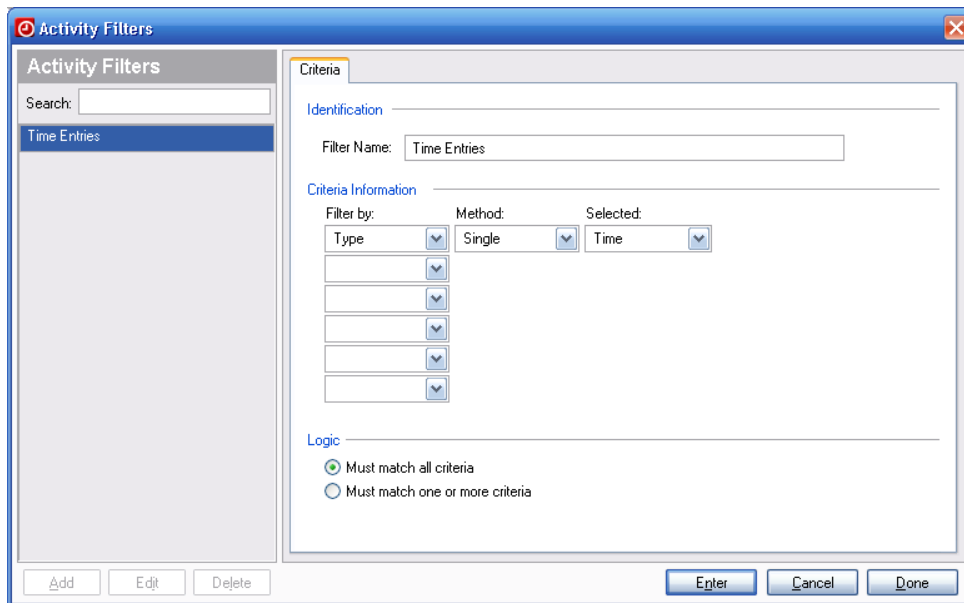
Preview Selected Print Selected

For Help, press F1 Current Login: CAG Current Period: 11/01/2008 - 11/30/2008

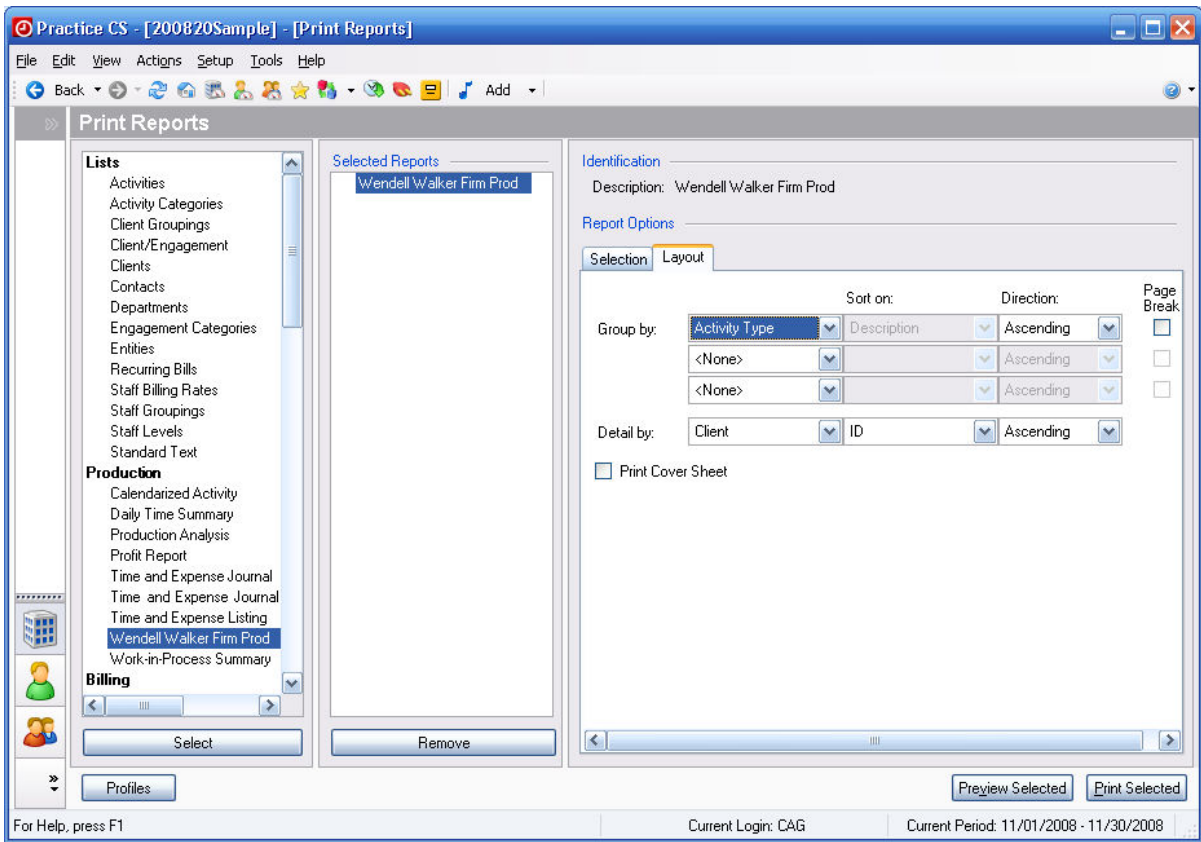
Screen Shot 2a



Screen Shot 2b



Screen Shot 3



Screen Shot 4

**Hackney & Carter CPA's
Firm Monthly Productivity Recap by Detail by: Client
November 30, 2008
January 1, 2008 - December 31, 2008**

Type of Information: Hours /Standard Amounts
January 1, 2007 - December 31, 2007

	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	Dec 08	
	Jan 07	Feb 07	Mar 07	Apr 07	May 07	Jun 07	Jul 07	Aug 07	Sep 07	Oct 07	Nov 07	Dec 07	Total
11246	Lightyear Handyman Services												
	12.60	2.50	0.00	0.00	15.00	0.00	0.00	0.00	0.00	0.00	128.00	5.00	163.10
	1,176.50	225.00	0.00	0.00	1,350.00	0.00	0.00	0.00	0.00	0.00	11,420.00	350.00	14,521.50
	4.50	2.50	6.90	2.00	5.00	5.25	2.00	3.40	3.75	5.70	1.75	3.40	46.15
	405.00	225.00	717.00	180.00	450.00	472.50	180.00	306.00	337.50	513.00	157.50	306.00	4,249.50
Report Totals													
	12.60	2.50	0.00	0.00	15.00	0.00	0.00	0.00	0.00	0.00	128.00	5.00	163.10
	1,176.50	225.00	0.00	0.00	1,350.00	0.00	0.00	0.00	0.00	0.00	11,420.00	350.00	14,521.50
	4.50	2.50	6.90	2.00	5.00	5.25	2.00	3.40	3.75	5.70	1.75	3.40	46.15
	405.00	225.00	717.00	180.00	450.00	472.50	180.00	306.00	337.50	513.00	157.50	306.00	4,249.50

Screen Shot 5

Practice CS - [200820Sample] - [Preview]

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Hackney & Carter CPA's Firm Monthly Productivity Recap by Detail by: Client November 30, 2008 January 1, 2008 - December 31, 2008 January 1, 2007 - December 31, 2007

Type of Information: Hours / Standard Amounts

	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	Dec 08	Total
	Jan 07	Feb 07	Mar 07	Apr 07	May 07	Jun 07	Jul 07	Aug 07	Sep 07	Oct 07	Nov 07	Dec 07	
Expense													
Expense													
11246	Lightyear Handyman Services												
0.00	0.00	0.00	0.00	10.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00	0.00	60.00
0.00	0.00	0.00	0.00	50.00	0.00	0.00	0.00	0.00	0.00	0.00	200.00	0.00	250.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Expense Expense Totals													
0.00	0.00	0.00	0.00	10.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00	0.00	60.00
0.00	0.00	0.00	0.00	50.00	0.00	0.00	0.00	0.00	0.00	0.00	200.00	0.00	250.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Time													
Time													
11246	Lightyear Handyman Services												
12.60	2.50	0.00	0.00	15.00	0.00	0.00	0.00	0.00	0.00	0.00	128.00	5.00	163.10
1,176.50	225.00	0.00	0.00	1,350.00	0.00	0.00	0.00	0.00	0.00	0.00	11,420.00	350.00	14,521.50
4.50	2.50	6.90	2.00	5.00	5.25	2.00	3.40	3.75	5.70	1.75	3.40		46.15
405.00	225.00	717.00	180.00	450.00	472.50	180.00	306.00	337.50	513.00	157.50	306.00		4,249.50
Time Time Totals													
12.60	2.50	0.00	0.00	15.00	0.00	0.00	0.00	0.00	0.00	0.00	128.00	5.00	163.10
1,176.50	225.00	0.00	0.00	1,350.00	0.00	0.00	0.00	0.00	0.00	0.00	11,420.00	350.00	14,521.50
4.50	2.50	6.90	2.00	5.00	5.25	2.00	3.40	3.75	5.70	1.75	3.40		46.15
405.00	225.00	717.00	180.00	450.00	472.50	180.00	306.00	337.50	513.00	157.50	306.00		4,249.50
Report Totals													
12.60	2.50	0.00	0.00	25.00	0.00	0.00	0.00	0.00	0.00	0.00	178.00	5.00	223.10
1,176.50	225.00	0.00	0.00	1,400.00	0.00	0.00	0.00	0.00	0.00	0.00	11,620.00	350.00	14,771.50
4.50	2.50	6.90	2.00	5.00	5.25	2.00	3.40	3.75	5.70	1.75	3.40		46.15
405.00	225.00	717.00	180.00	450.00	472.50	180.00	306.00	337.50	513.00	157.50	306.00		4,249.50

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