

# New Features for Reports

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Multiple updates have been deployed based on customer inputs.

1- Net Investment Report, name of report changed to Invoice and WIP Aging with an option to exclude non-billable time or expenses

The Invoice and WIP (Work in Progress) Aging report shows how much money is invested by the firm in a client with aging of invoices and WIP. Since Non-billable time and expenses will not be collected, users can exclude them from the WIP.

2- Time Cards Report – title and initials column on CSV output

Some firms need to run reports by titles to see how time is being spent by a particular type of employee. By using Pivot Tables in Excel, a user can easily view the CSV output of Time Cards report and total the time by title of a timekeeper. Timekeeper titles can be entered by going to Administration, Staff, click on a user-name and enter title on the lower right of the Profile tab.

3- Reports – AR report driven by As-Of-Date

Customers needed the AR report by As-Of-Date. The As-Of-Date filters on debit dates, i.e. invoice and opening balance dates and credits, i.e. payments, credit memos, or write off dates. The same date fields apply for including WIP and Trust Payments.