

Tip of the Week: Report formats

Monthly and annual reports are valuable tools in building a successful law practice. They provide you with detailed information about your firm from a variety of financial and management perspectives. Used properly, monthly reports can help you identify what is working within your business and what needs improvement. Gain fresh insights into your business with 31 different reports for law firms and other businesses covering billable hours, accounts receivable, expenses, performance, and more. Our insightful reports can be viewed and shared in 10 formats, including PDF, Excel, Word, and more.

To access reports, click on the Reports tab at the top of the screen and select the type of report you need to generate. By default, the format of reports is set to PDF, but users can change this as needed. CSV is a popular format used by our clients as it opens up into Excel, allowing users to work with the report in Excel.

There are multiple filtering options for each type of report. Users can choose which Professional to include, Client-Matters, Categories, Responsible Professionals, Task Codes, Status, Billable Type, Approval Status, Date Range, and so much more.

If you'd like TimeSolv support to help you with our reports feature, please call 1.800.715.1284 or Contact support!

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