

Tip of the Week: Run Accounts Receivable Report by Categories

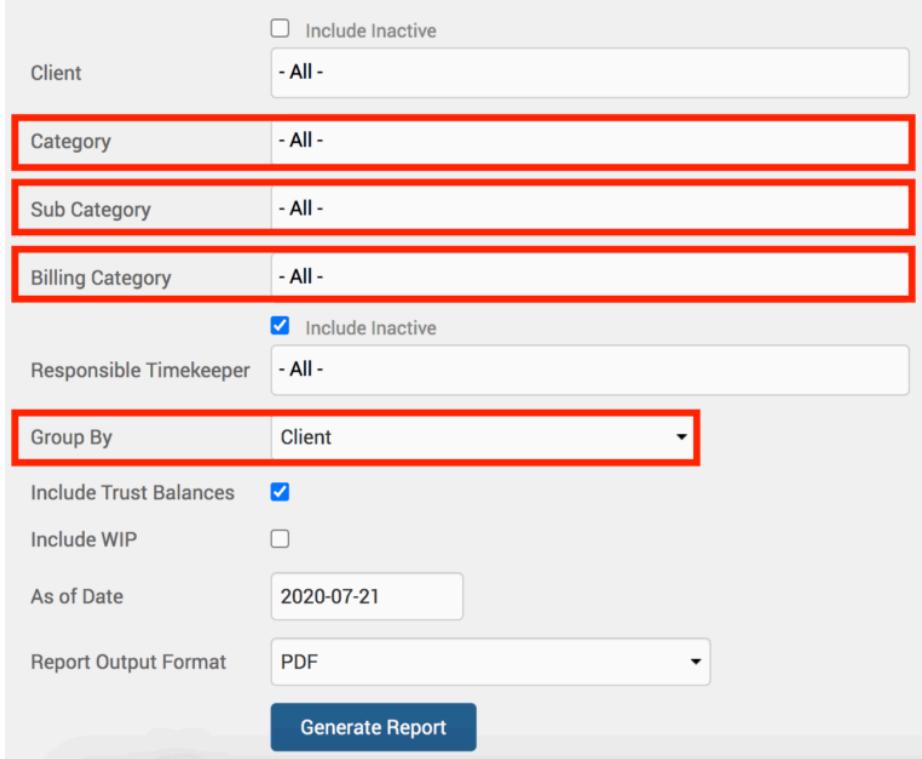
Quality legal services require time and effort to acquire. That same time and effort transpire to the collection of invoice payments. When accounts receivables are too high, law firms struggle to keep up with profitability. This is why it's so important to keep a tab on your accounts receivables before it potentially outweighs your business's ability to manage. TimeSolv has added an extra filter to our Accounts Receivable Report by allowing users to now filter the report by categories. This week's Tip of the Week will take a look at the new report filter.

Users can now filter the **Accounts Receivable Report** by **Clients, Categories**, and **Responsible Timekeeper and Client**.

You will need to have Categories set up and in use for these new report filters to be visible and useful for you. Click for more information on setting up Categories and Billing Categories.

To get started with building out the report, click under **Reports>Accounts Receivable** link.

Accounts Receivable



The screenshot shows the 'Accounts Receivable' report configuration interface. It includes the following fields:

- Client:** Includes an for 'Include Inactive' and a dropdown menu set to '- All -'.
- Category:** Includes a dropdown menu set to '- All -'.
- Sub Category:** Includes a dropdown menu set to '- All -'.
- Billing Category:** Includes a dropdown menu set to '- All -'.
- Responsible Timekeeper:** Includes an for 'Include Inactive' and a dropdown menu set to '- All -'.
- Group By:** A dropdown menu set to 'Client', which is highlighted with a red box.
- Include Trust Balances:** An is selected.
- Include WIP:** An is not selected.
- As of Date:** A date input field showing '2020-07-21'.
- Report Output Format:** A dropdown menu set to 'PDF'.

Generate Report button is located at the bottom of the form.

You can see above we now have filters for **Category**, **Sub-Category**, **Billing Category**, and the ability to **Group by Clients**, **Category and Client**, or **Responsible Timekeeper and Client**.

TimeSolv's Accounts Receivable Report is designed to help firms determine and quantify amounts outstanding on all Open and Past Due Invoices on a per-Timekeeper, per-Client, and per-Matter basis. The new report filters help users get into the nitty-gritty details and refine their overview assessment of the business's account receivables condition.

If you'd like to contact TimeSolv support for help, please call 1.800.715.1284 or [Contact support!](#)

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