

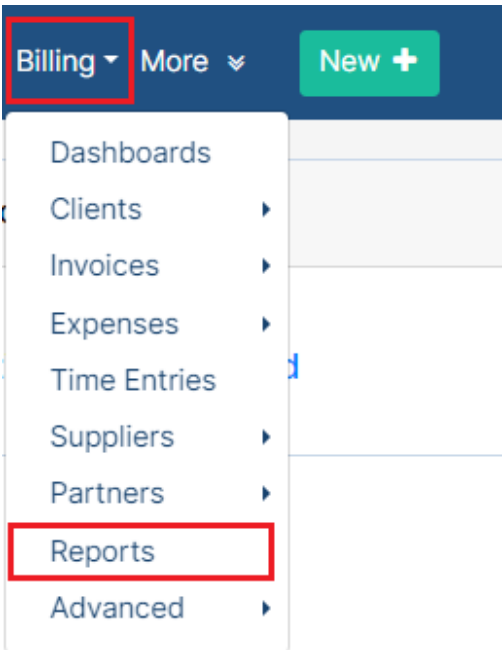
# Billing Reports-Matters

## Objectives

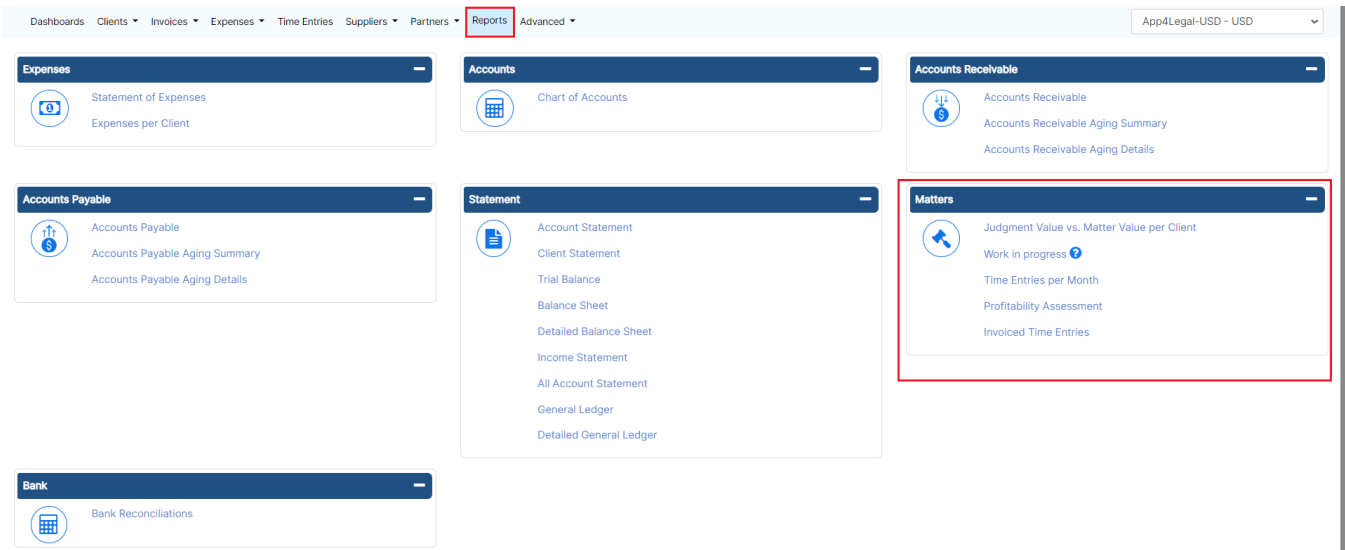
- Judgment Value vs. Matter Value per Client Report
- Work in progress
- Time Entries per Month
- Profitability Assessment
- Invoiced Time Entries

## Steps

In order to generate the matter-related reports, you must first access the Billing Report page by clicking **Billing Reports** from the main menu:



Within the Reports page, choose the report needed under the **Matters** section:



**Judgment Value vs. Matter Value per Client:**

This report shows the accumulated amounts of Matter Values, Total Expenses, Total Judgment, and Total Recovered Values for each client. You can filter by Arrival Date, and from the action wheel on the top right you have the option to **show more details**, **export to Excel**, and **view the report in a Chart**.

Dashboards

Clients

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App4Legal-USD - USD

Judgment Value vs. Matter Value per Client Report

Arrival Date

between

2023-01-01

and

2023-05-08

Search

Currency: USD

Client	Total Matters Values	Total Expenses	Total Judgment Values	Total Recovered Values
Eliane Travis	0.00	288,900.00	0.00	0.00
BTL Insurance	0.00	288,900.00	10,000.00	0.00
Jennifer Spencer	0.00	96,300.00	0.00	0.00
HSBC	0.00	385,200.00	0.00	0.00
Paul Jones	0.00	96,300.00	0.00	0.00
Lauren Travis	0.00	192,600.00	0.00	0.00
BLP Industry	0.00	577,800.00	2,000.00	0.00
Alvah Scott	0.00	192,600.00	0.00	0.00

Page 1 of 1

50

items per page

1 - 8 of 8 items

Work in Progress:

The work in progress means all the not **invoiced** activities such as **time entries**, **expenses**, or **billable items** for which no invoice has been issued or invoiced on a draft invoice.

Dashboards

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Lenzur - AED

Work in progress

Report Filters

Date

between

2023-12-01

and

2023-12-07

Client Name

M20, Matter Name or Client Name

Practice Area

Choose Practice Area

Workflow Status

Choose Workflow Status

Assignee

Choose User

Assigned Teams

Select Assigned Teams

Referred By

Start typing

Requested By

Start typing

User

Choose User

Type

Time Entry, Expenses, Billable Item

Billing Method

Select

Include activities fetched on draft invoices/quotes?

Search

Group

Show Details

Currency

AED

Tax (%)

Nothing selected

You can filter by Date, Client Name, Matter, Practice Area, Status, Assignee, and much more. And you can choose the type of activities you want to show in this report such as Time Entries, Expenses, Billable Items, or all of them.

Work in progress

Report Filters

Group

Show Details

Show Details

Group By Matter

Group By Matter / Show Details

Currency

USD

Tax (%)

VAT (11.00%)

Type	Matter ID	Matter	Practice Area	Assignee	Assigned Team	Referred By	Requested By	Workflow Status	Client	User	Comments	Date	Quantity	Unit Price (USD)	Sub Total (USD)	Tax Number	Tax (%)	Tax (USD)	Total (USD)
Time entry	M199	Project USTD	Telecommunication	James Marven	All Teams			In Progress	Michelin	James Marven		2023-05-02	1h 30m	200.00	300.00		11%	33.00	333.00
Time entry	M199	Project USTD	Telecommunication	James Marven	All Teams			In Progress	Michelin	James Marven		2023-05-02 15:58 - 2023-05-02 15:59	6m	200.00	20.00		11%	2.20	22.20
Time entry	M199	Project USTD	Telecommunication	James Marven	All Teams			In Progress	Michelin	James Marven		2023-05-03	1h 12m	200.00	240.00		11%	26.40	266.40
Time entry	M205	Legal opinion for ABC services	Legal opinion	Micheal Cavino	All Teams			Open	ABC Services	James Marven		2023-05-04	1h 24m	200.00	280.00		11%	30.80	310.80
Time entry	M205	Legal opinion for ABC services	Legal opinion	Micheal Cavino	All Teams			Open	ABC Services	James Marven		2023-05-05	1h 30m	200.00	300.00		11%	33.00	333.00
Time entry	M28	Legal	Agreement	Sam	Corporate	Adam Skims	Pending	SA	Carolina			2023-	2h	300.00	600.00		11%	66.00	666.00

Additionally, you can Group the result by Matters, and export to Excel or PDF from the 3 dots option in the top right.

Time Entries per Month:

This report shows Time Logs per month for all users or for each user alone including the total invoiced and collected with or without tax.

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App4Legal-USD - USD

Time Entries per Month

Log Date

between

2023-12-01

and

2023-12-07

Show/Hide

Show Total Invoiced without Tax

Show Total Invoiced with Tax

Show Total Collected without Tax

Show Total Collected with Tax

Show Total Invoiced and Collected without Tax

Show Total Invoiced and Collected with Tax

Search

Report Generated for the records dated between 2023-12-01 and 2023-12-07

Time logs for all users

Month	Hours	Total Invoiced without Tax (USD)	Total Invoiced with Tax (USD)	Total Collected without Tax (USD)	Total Collected with Tax (USD)	Total Invoiced and Collected without Tax (USD)	Total Invoiced and Collected with Tax (USD)
December	4.00	2,600.00	2,600.00	0.00	0.00	2,600.00	2,600.00

Time logs for each user

User/Total-month	Hours December	Total Invoiced without Tax (USD) December	Total Invoiced with Tax (USD) December	Total Collected without Tax (USD) December	Total Collected with Tax (USD) December	Total Invoiced and Collected without Tax (USD) December	Total Invoiced and Collected with Tax (USD) December
Alice Jones	2.00	600.00	600.00	0.00	0.00	600.00	600.00
Sam Marvin	2.00	2,000.00	2,000.00	0.00	0.00	2,000.00	2,000.00

Profitability Assessment:

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App4Legal-USD - USD

Profitability Assessment

From Date

2023-12-01

To Date

2023-12-07

Search

Invoice #	Client Account	Client Account Number	Total	Collection	Balance Due	Currency	Status	Invoice Date	Due On	P.O#	Invoice Ref	Matter ID	Matter Name	Assignee	Assigned Team	Sub-Total After Discount (USD)	Billable Amount (USD)	Profit (USD)
INV0000109	Maria Smith - USD	CL144	800.00	0.00	800.00	USD	draft	2023-12-06	2023-12-21	2568341	REF 1256358	M00000261	Commercial Consultation for Maria	Carolina Robinson	All Teams	800.00	3,550.00	-2,750.00
INV0000110	Maria Smith - USD	CL144	2,900.00	0.00	2,900.00	USD	draft	2023-12-06	2024-01-05	25633	1225665	M00000341	Legal Advice for Maria	Carolina Robinson	All Teams	2,900.00	5,650.00	-2,750.00
INV0000111	Advanced Industries - SAR	CL172	1,851.85	1,851.81	0.04	SAR	overdue	2023-12-06	2023-12-06							500.00	0.00	500.00

1 - 3 of 3 Items

Invoiced Time Entries:

Displays the time entries that have been invoiced, along with the invoices and their respective details.

Dashboards

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Time Entries

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App4Legal-USD - USD

Invoiced Time Entries

41 - 60 of 103 items

Export

Advanced

Columns

Invoice#	Client's Account	Client Account Number	Currency	Status	Invoice Date	Due On	Sub Total	Total Discount	Sub Total After Discount	Payment Made	Balance
INV0000055	Advanced Industries - USD	CL41	USD	paid	2023-03-08	2023-04-07	3,320.00 USD	0.00 USD	3,320.00 USD	3,320.00	0.00
INV0000054	BLP Industry - USD	CL67	USD	overdue	2023-03-08	2023-04-07	1,600.00 USD	0.00 USD	1,600.00 USD	1,000.00	600.00
INV0000053	Jennifer Spencer - USD	CL114	USD	overdue	2023-02-01	2023-04-01	6,185.00 USD	168.50 USD	6,016.50 USD	5,500.00	571.50
INV0000051	Jennifer Spencer - USD	CL114	USD	overdue	2023-02-15	2023-02-28	4,815.00 USD	0.00 USD	4,815.00 USD	2,000.00	2,815.00
INV0000047	Jennifer Spencer - USD	CL114	USD	overdue	2023-02-10	2023-02-28	2,600.00 USD	0.00 USD	2,600.00 USD	1,500.00	1,100.00
INV0000046	SSC Software - USD	CL117	USD	paid	2023-02-07	2023-02-07	500.00 USD	0.00 USD	500.00 USD	500.00	0.00
INV0000045	Jennifer Spencer - USD	CL114	USD	overdue	2023-02-07	2023-03-11	300.00 USD	0.00 USD	300.00 USD	0.00	300.00
INV0000044	Jennifer Spencer - USD	CL114	USD	overdue	2023-02-07	2023-02-28	1,600.00 USD	0.00 USD	1,600.00 USD	1,100.00	500.00
INV0000041	BLP Industry - USD	CL67	USD	paid	2023-01-31	2023-03-02	1,200.00 USD	63.85 USD	1,200.00 USD	1,213.15	0.00

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!