Amicus Reports

Applies to: Amicus Attorney

Category	Accessible To	Report	Run Options	Type *	
Calendar	Firm Members	**Appts - Date Range (4 Day Letter Size)**	From To	B	
		Appts - Date Range (5 Day Legal Size)	From To	B	
		Appts and ToDos - Date Range (5 Day Legal Size)	From To	B	
		Appts and ToDos List - Date Range	From To	B	A
		Appts List – Date Range	From To	B	
		Day Runner E Daily (3.75x6.75)	From To	B	
		Day Timer Portable Daily (3.75x6.75)	From To	B	
		Franklin Covey Compact Daily (4.25x6.75)	From To	B	
		Full Page Day View - Color	From To	B	
		ToDos - Date Range (4 Day Letter Size)	From To	B	
		ToDos - Date Range (5 Day Legal Size)	From To	B	
		ToDos List - Date Range	From To	B	
		Tri-Fold Daily Pocket Calendar	Date	B	
		My Events – Selected Category (List)	From To Include Notes Initials/Name Event Category	B	
Client Portal	Firm Members	**All Client Portal Shared Records - Selected File**	File		A
		My New Client Portal Changes - Date Range	From To		A
Communica-tions	Firm Members	**My Calls and Messages - Date Range**	From To	B	
		Outstanding Communications - Date Range	From To	B	A
		Today's Calls and Messages	Date	B	
		Today's Calls	Date	B	
		Today's Unreturned Messages	Date	B	
		Unreturned Messages - Date Range	From To	B	
Files	Firm Members	**All Events Selected File**	Include Notes File Initials/Names	B	
		All Time - Selected File	Minimum Time Rounding Time File Initials/Names	B	
		My Events Selected File	Include Notes File Initials/Names	B	
		My File Index - All Files	—	B	

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Files	*Firm Members*	**My File Index - Closed in Date Range**	From To File Status	B	
		My File Index - Opened in Date Range	From To File Status	B	
		My File Index - Specified Status	File Status	B	A
		My File Summary - All Files	Display Firm Members Initials/Names	B	
		My File Summary - Closed in Date Range	From To Display Firm Members Initials/Names File Status	B	
		My File Summary - Opened in Date Range	From To Display Firm Members Initials/Names File Status	B	
		My File Summary - Specified Status	Display Firm Members Initials/Names File Status	B	
		My Files with Associated People (one per page)	—	B	
		My Files with Associated People	—	B	
		My Resp Lawyer File Assignment Index - Specified Status	File Status Initials/Names	B	
		My Resp Lawyer Files with People (one per page)	—	B	
		My Resp Lawyer Files with People	—	B	
		My Time - Selected File	Minimum Time Rounding Time File	B	
		People - Selected File (Graphic)	File	B	
		My Files - Custom Pages	File Type Files Custom Page		A
		My Files - Custom Records	File Type Files Custom Record		A
People	Firm Members	**People Index - Phone and City and State**	—	B	
		People Index - Phone and E-mail	—	B	
		People Index - Phone and Groups	—	B	
		People Index - Phone, E-mail and Address	—	B	A
		People Index - Selected File	File	B	
		People Index - Selected Role	Role	B	
		People Summary - Selected File	File	B	
		People Summary - Selected Role	Role	B	
Time	Firm Members	**All My Time - Date Range**	From To Minimum Time Rounding Time	B	A
		My Billable Time - Date Range (Color Bar Graph)	From To Minimum Time Rounding Time	B	
		My Billable Time - Date Range	From To Minimum Time Rounding Time	B	

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Time	*Firm Members*	**My Non Billable Time - Date Range**	From To Minimum Time Rounding Time	B	
		My Time - Specified Client	From To Minimum Time Rounding Time Contacts	B	
		My Time - Specified File - Date Range	From To Minimum Time Rounding Time File	B	
		My Time - Specified File	Minimum Time Rounding Time File	B	
Business Planning	Administrators	**Areas of Practice - Practice Distribution (BW Graph)**	From To	B	
		Areas of Practice - Practice Distribution (Color Graph)	From To	B	
Calendar	Administrators	**Appts - All Firm Members**	From To	B	
		Appts - Selected Firm Members	From To Firm Members	B	
		Appts and To Dos - All Firm Members	From To	B	
		Appts and To Dos - Selected Firm Members	From To Firm Members	B	A
		Schedule 3-Days per Page (Letter Size)	From To Firm Members	B	
		Schedule 5-Days per Page (Legal Size)	From To Firm Members	B	
		To Dos - All Firm Members	From To	B	
		To Dos - Selected Firm Members	From To Firm Members	B	
Files	Administrators	**File Assignment Index - Selected File Status**	File Status Initials/Names	B	A
		File Index with Associated People - All Files	—	B	
		Master File Index - All Files	—	B	
		Master File Index - Closed in Date Range	From To File Status	B	
		Master File Index - Opened in Date Range	From To File Status	B	
		Master File Index – Specified Status	File Status	B	
		Master File Summary - All Files	Display Firm Members Initials/Names	B	
		Master File Summary - Closed in Date Range	From To Display Firm Members Initials/Names File Status	B	
		Master File Summary - Opened in Date Range	From To Display Firm Members Initials/Names File Status	B	
Files	*Administrators*	**Master File Summary – Specified Status**	Display Firm Members Initials/Names File Status	B	

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		File Index - Specified Status - Selected Firm Members	File Status Firm Members	A
People	Administrators	**People Index - Phone and City and State**	—	B
		People Index - Phone and E-mail	—	B
		People Index - Phone and Groups	—	B
		People Index - Selected File	File	B
		People Index - Phone, E-mail and Address - Selected Firm Members	Firm Members	A
System Admin	Administrators	**Active Firm Member Profiles**	—	B
		Custom Configuration Settings	—	B
		Firm Member Groups	—	B
		Firm Member Roles	—	B
Time	Administrators	**Time Entries - All Timekeepers - Selected Date Range**	From To Minimum Time Rounding Time	B
		Time Entries - Selected Client and Date Range	From To Minimum Time Rounding Time Contacts	B
		Time Entries - Selected File and Date Range	From To Minimum Time Rounding Time File	B
		Time Entries - Selected Timekeepers and Date Range	From To Minimum Time Rounding Time Firm Members Initials	B
		Time Entries - Selected Timekeepers	From To Firm Members Minimum Time Rounding Time Billable Status	A

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Amicus Billing	Billing Users & Supervisors	**Accounts Receivable by Client** *Lists Accounts Receivable balances for Files, along with the aging of each outstanding invoice. Client name and phone number assist you in collections. Trust and General Retainer balances help identify Files that have Retainer balances which can be used to pay outstanding balances.* *(A Billing User's data is restricted to their own Files.)*	From To Receipts up to Date Responsible Lawyer Assigned Firm Member Introducing Lawyer Fee Credit Lawyer File Type Files Clients Billing Category Invoice Numbers Aging Category Minimum AR Balance	A
		Bill Journal *Lists Client Bills and breaks down the charges by fees, expenses, taxes, and interest. Receipts, write ups and write downs, and aging are shown.* *(A Billing User's data is restricted to their own Files.)*	From To Receipts up to Date Write Up/Down up to Date Responsible Lawyer Assigned Firm Member Introducing Lawyer Fee Credit Lawyer File Type Files Clients Billing Category Include Closed Files Invoice Number Include Corrections Include Paid Minimum AR Balance	A
		Cash Receipts Report *Details all client receipts for your Trust Bank Accounts and Operating Account. Summaries are provided by Bank Account, File and Responsible Lawyer.* *(A Billing User's data is restricted to their own Files.)*	From To Payment Reference Include Corrections Received From Contains Bank Account	A
		Client Accounting Ledger *Totals up billed and unbilled fees, expenses and payments to the operating account to provide a net balance for the client.* *(A Billing User's data is restricted to their own Files.)*	From To Responsible Lawyer File Type Files Clients	A
		Client Expense Report *Shows details and a summary of expenses entered for Files. Expense details include: description charge, expense type (hard or soft cost) and billing status of the entry. The report can be run for one or more files. Summaries appear by Responsible Lawyer, File Type and Expense Code.* *(A Billing User's data is restricted to their own Files.)*	From To Working Lawyer Responsible Lawyer Assigned Firm Member Introducing Lawyer Clients Files File Type Billing Category Include Task Based File Include Closed Files Billing Status Expense Type Expense Code Include Corrections Minimum Amount Reference Number Description Contains	A

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Amicus Billing	*Billing Users & Supervisors*	**Client Listing** *Provides a concise summary of Files and their current balances including Work in Progress, Accounts Receivable, Trust and General Retainer balances. WIP and AR are broken down by fees and expenses. Summaries appear by File Type and Responsible Lawyer.* *(A Billing User's data is restricted to their own Files.)*	End Date Responsible Lawyer Assigned Firm Member Introducing Lawyer File Type Files Clients Billing Category Include Closed Files	A
		Client Payment Distribution *Displays payments made against Client Bills. It details how the receipt was allocated between attorneys for fees as well as expenses, interest and taxes. File totals appear, and summaries by Fee Lawyer, File Type and Responsible Lawyer.* *(A Billing User's data is restricted to their own Files.)*	From To Responsible Lawyer Introducing Lawyer Fee Credit Lawyer File Type Files Clients Billing Category Include Closed Files Invoice Number Receipt Number	A
		Client Profitability Report *Summarizes all the fees and expenses entered on a File and shows how much has been billed and the effective Billing Realization. Additionally, it shows how much of what has been billed has actually been paid and the resulting Collection Realization. This report can be used to identify the profitability of your cases and files.* *(A Billing User's data is restricted to their own Files.)*	From To Responsible Lawyer Clients Files Billing Category Include Closed Files Show File Summary Only	A
		Client Transactions *Provides a detailed or summary of accounting transactions for one or more Files. Details for fees, expenses, Bills, payments, and Trust accounting appear in chronological order. Summaries include: billed charges, unbilled charges, Accounts Receivable and Retainer balances (General and Trust).* *(A Billing User's data is restricted to their own Files.)*	From To Responsible Lawyer Assigned Firm Member Introducing Lawyer File Type Files Clients Billing Category Include Closed Files Billing Status Transaction Types Show Details Files with Trust or Retainer Only	A
		Client Trust Listing *Details File allocation of all the funds in each Trust Bank Account. The report includes summaries by Responsible Lawyer and Bank Account.* *(A Billing User's data is restricted to their own Files.)*	Trusts Up To: Responsible Lawyer Assigned Firm Member Introducing Lawyer File Type Files Clients Billing Category Include Closed Files Billing Status Trust Account Minimum Entry Amount	A
		GL Transaction Report *Shows the General Ledger effect of the Billing transactions including; receipts and Trust activity (based on a cash accounting system).* *(A Billing User's data is restricted to their own Files.)*	Transaction Starting Date Transaction Ending Date Posting Starting Date Posting Ending Date	A

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Amicus Billing	*Billing Users & Supervisors*	**Invoice History** *Shows a chronological history of all activity pertaining to a particular invoice, including payments and write up/downs. The Report can also be run from the Billing Index or the Bills view of File Details.* *(A Billing User's data is restricted to their own Files.)*	Invoice Number	A
		Monthly Time Summary by Timekeeper *Summarizes on a month by month basis the hours tracked per timekeeper by practice area.* *(A Billing User's data is restricted to their own Files.)*	From To Timekeeper File Type	A
		Retainer Replenishment *Lists Files that require a retainer on account and shows the type of retainer required (General or Trust), the balance, and the required amount (if any) to maintain the minimum balance.* *(A Billing User's data is restricted to their own Files.)*	Files	A
		Settlement Statement *Provides a detailed list of billed and unbilled fees and expenses as well as payments and trust activity. It does not create an actual invoice.* *(A Billing User's data is restricted to their own Files.)*	From To Responsible Lawyer File Type Files Clients	A
		Time and Fee Journal *Details and summarizes time and fees created for all your Files. The Billed status as well as the Billing Behavior appears for each entry. Summaries by Timekeeper, Responsible Lawyer, Activity Code, File Type and Billing Category are included.* *(A Billing User's data is restricted to their own Files.)*	From To Working Lawyer Responsible Lawyer Assigned Firm Member Introducing Lawyer Clients Files Billing Category File Type Include Closed Files Include Task Based Files Billing Rate Billing Behavior Billing Status Pending Status Posting Status Transaction Type Activity Code Minimum Fee Amount Minimum Duration (Hours) Include Corrections Description Contains	A
		Time Billing and Collections *Summarizes by File all the accounting activity that has occurred including: Time, Expenses, Billing, Collections and Write Up/Down.* *(A Billing User's data is restricted to their own Files.)*	From To Responsible Lawyer Assigned Firm Member Introducing Lawyer Files Clients Billing Category Include Closed Files	A
		Trust Bank Journal *Details all checks and receipts for your Trust Bank Accounts. Summaries are provided by Bank Account, File and Responsible Lawyer.* *(A Billing User's data is restricted to their own Files.)*	From To Receipt/Check Number Include Corrections Received From/Paid To Contains Trust Account	A

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Amicus Billing	*Billing Users & Supervisors*	**WIP Report** *Summarizes and displays aging for unbilled fees and expenses per File. Summaries are provides by Responsible Lawyer and File Type.* *(A Billing User's data is restricted to their own Files.)*	From To Working Timekeeper Responsible Lawyer Assigned Firm Member Introducing Lawyer File Type Files Clients Billing Category Include Closed Files Billing Behavior Aging Category Minimum File WIP Amount Include Zero Balances	A
		Write Up/Down Journal *Provides details Write Ups and Downs by Invoice. Changes to fees, expenses, taxes and interest are itemized. Summaries are provided by Responsible Lawyer, File Type and Fee Lawyer.* *(A Billing User's data is restricted to their own Files.)*	From To Responsible Lawyer Assigned Firm Member Introducing Lawyer Fee Lawyer File Type Files Clients Billing Category Invoice Numbers Include Closed Files Include Deletions Include Report Selections	A

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May 2020

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