Overview

The “Reports” feature gives you access to your account’s data. Users can examine their data by running a report on demand. Types of reports include **Case Fees**, **Invoice Payments**, **Order Summaries**, **Order Fees, Service Fees and Court Fees,** and **Monthly Order Summary**.

Based on the report type, the user may run a report using a case number or date range. The report is generated in the browser window for easy viewing and can be exported in common formats such as Excel, PDF or HTML.

Key Benefits

1. The “Reports” feature provides: Access to account data updated in real time to help monitor and manage your work, including case fee reconciliations.

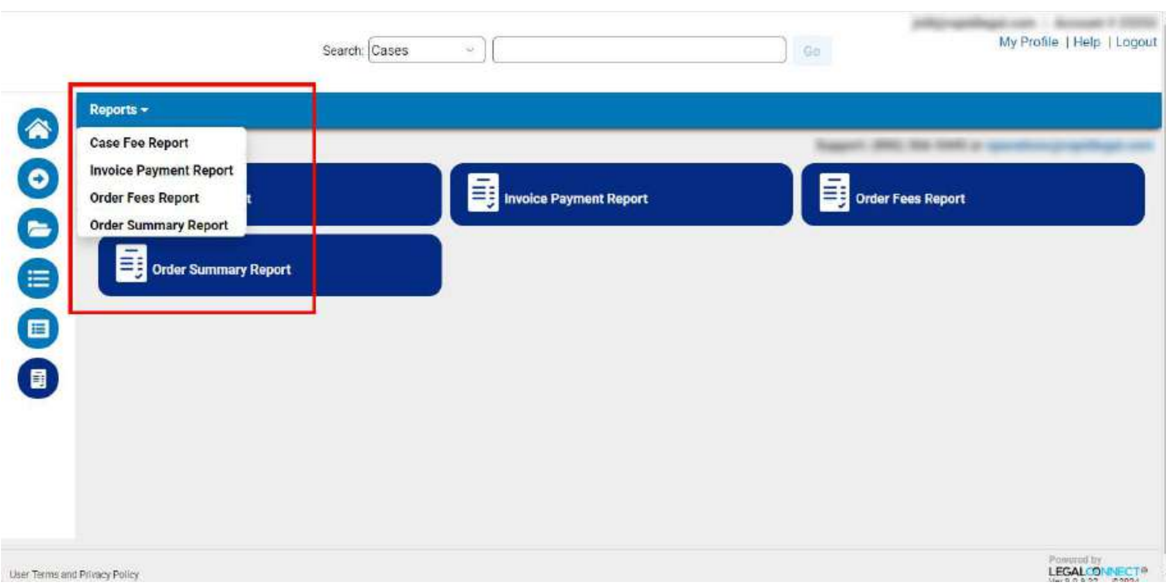
2. Flexibility to **share data and insights** across the firm with reports that can be exported in a range of formats including PDF, HTML, CSV, and Data Feed.

How to Access the Reports

The Reports section can be accessed by clicking on “Reports” on the left navigation or clicking on the “Reports: header.

1. Left Navigation
    a. Click on the “Reports” icon.

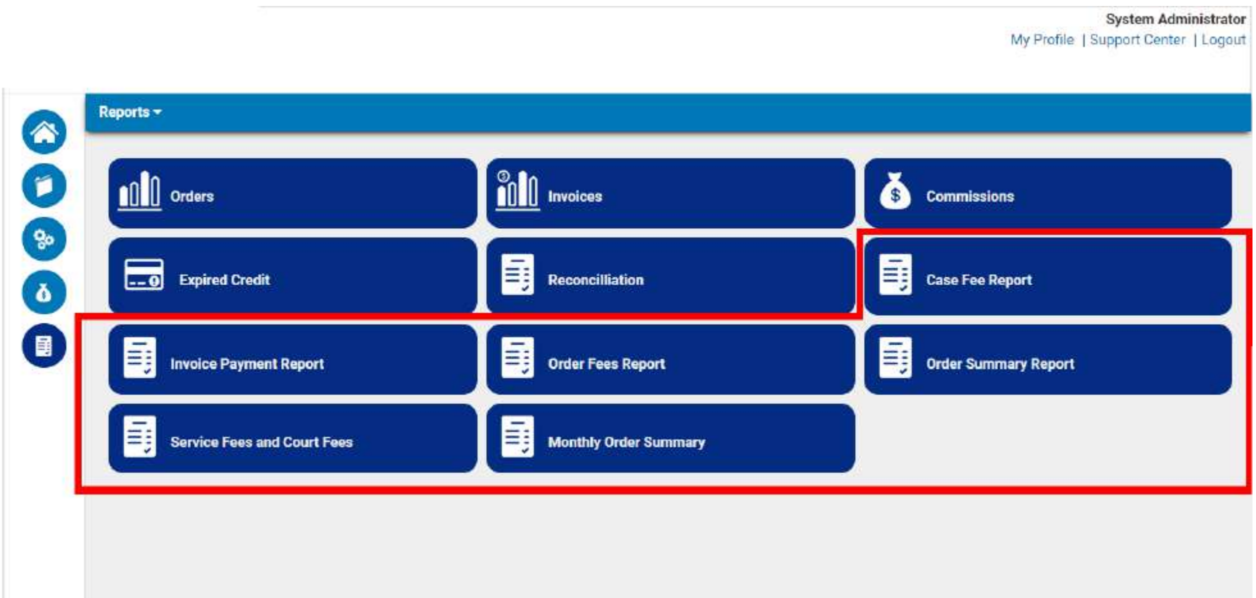
2. Top Header
    a. Click on the “Reports” header menu to **view the dropdown list** of the available reports.



Available Reports:

In the “Reports” section you can **view and select** from the following reports:

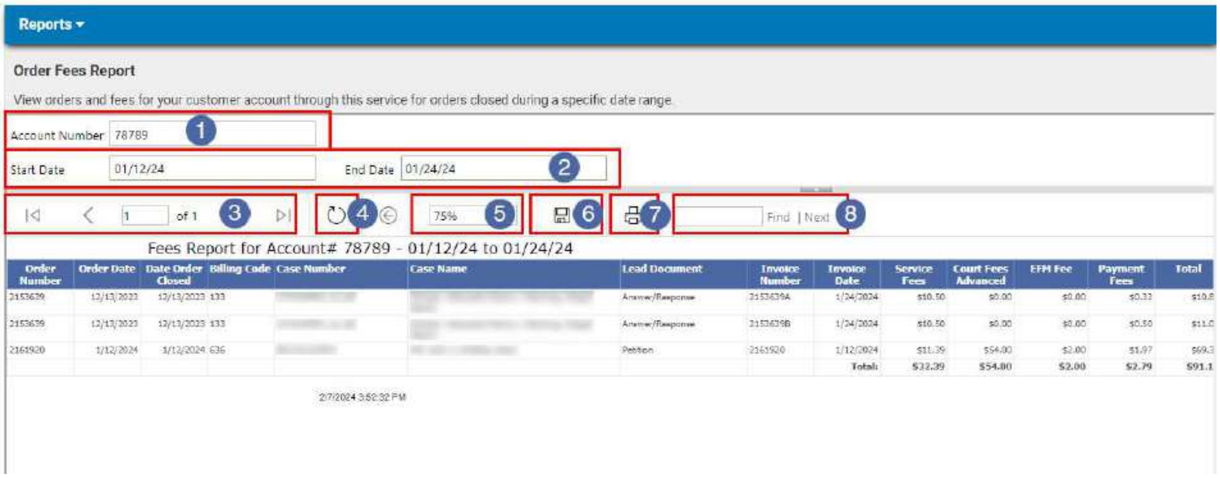
- Case Fees
- Invoice Payments
- Service Fees and Court Fees
- Order Summaries
- Order Fees
- Monthly Order Summary



What is Included in Each Report?

To learn what is included in the report, **hover over each of the buttons** for the descriptions.

How to Navigate the Reports:



1. **Account Number:**
    a. Enter the account number on which you would like to base the report.

2. **Start and End Date**
    a. Start Date: Enter the date on which the **search should begin**.
    b. End Date: Enter the date on which the **search should conclude**.

3. **Pagination:**
    a. Use the left arrow to return to the previous page and the right arrow to advance to the next page.

4. **Refresh:**
    a. Click the refresh button to refresh all the data in the report.

5. **Zoom:**
    a. The zoom function allows you to view the results at larger or smaller size.

6. **SAVE:**
    a. Use the SAVE button to **download the report** in Word, Excel, PowerPoint, PDF, CSV, XML, and Data Feed formats.

7. **PRINT**

8. **FIND | NEXT**
    a. Use this field to search within the existing document.

How to Run a Report:

Below are two step-by-step examples of how to run **two different types of reports**: the Order Fees Report and the Case Fee Report.

These same steps may be used to run almost any report.

Step-by-step example #1

How to run the Order Fees Report

1. From the dashboard or the left menu select "Reports" then click on the report name.
   Note: The search criteria will vary depending on the type of report.
2. Select the "Order Fees Report"
   a. A new page will open.
   b. In the report screen enter an account number.
   c. Enter a date range:
      Start Date and an **End Date.**
      Example: To search for data from January 1, 2024, to February 1, 2024, use the following format:
         Start Date: 1/1/24
         End Date: 2/1/24
   d. Once the account number and the date range have been entered, press ENTER.
3. When the report loads use the navigation to review the data.

TIP: The date format is dd/mm/yy where dd is the date, mm is the month and yy is the year.

Step-by-step example #2:

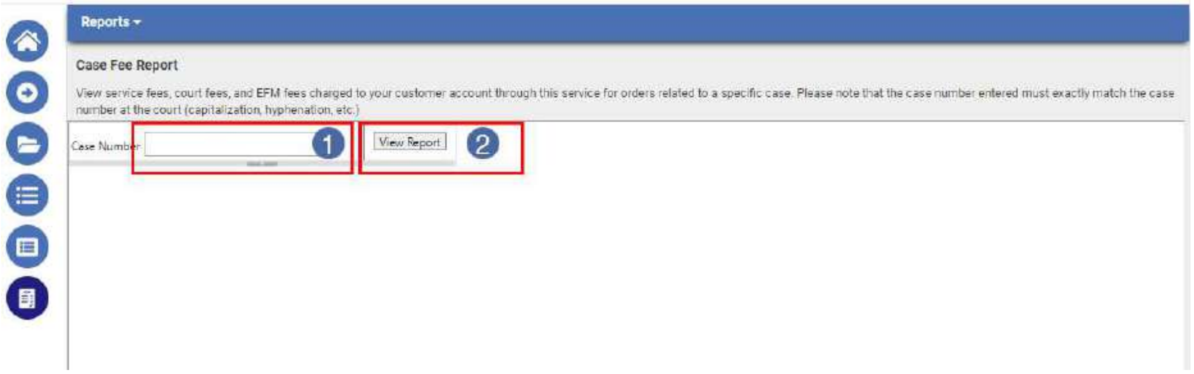
How to use the Case Fee Report

The Case Fee Report displays the service fees, court fees, and EFM fees charged to your customer account through this service for orders related to a specific case.

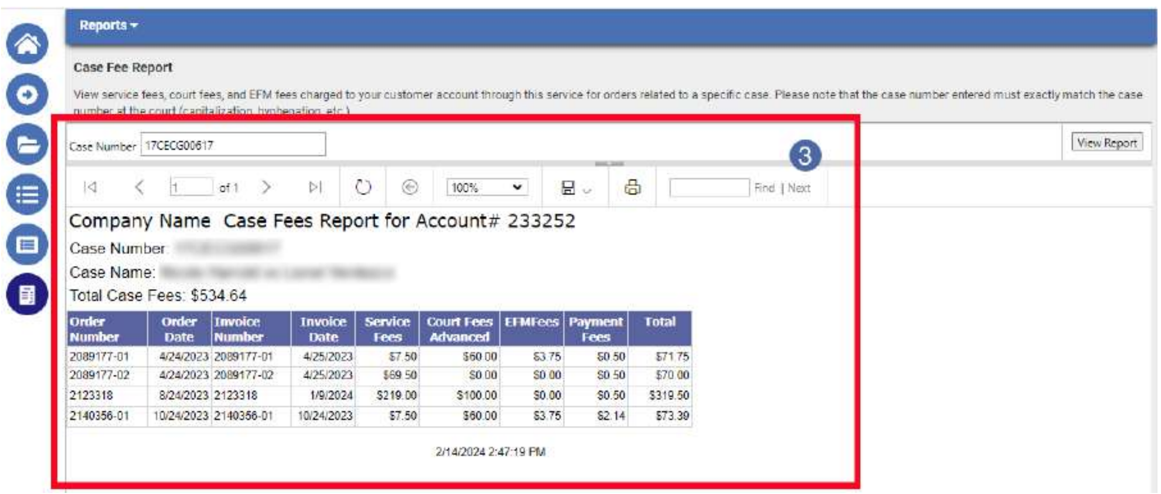
Please note that the case number entered must exactly match the case number at the court (capitalization, hyphenation, etc.).

From the Reports navigation, click on "Case Fee Report".

1. In the Case Fee Report, **enter a valid case number** in the "case number" field.
2. Click on "View Report" to search.



3. The results will display as shown in the screenshot below:



4. Use the left and right arrow **to navigate to the next and previous pages**. The right arrow is enabled when the results include 50 or more records.
5. Use the "refresh" button to reload the current data.
6. Use the zoom button to zoom in or zoom out.
7. Click on the "Print" icon to print or export the report.
8. To **search for a record within the page**, use the search function on the top right of the page, click on "Find." If there are multiple matches you may use the "Next" link to find the match.

*<u>*You can follow similar steps for the other reports.</u>*

Frequently Asked Questions

1. **What Reports are available for Customers?**
    a. Customers can run the following reports:
        i. Case Fee Report
        ii. Invoice Payment Report
        iii. Order Fees Report
        iv. Order Summary Report

2. **Are all customer users able to view reports?**
    a. No, only administrators can view reports in the Customer Portal.

3. **Can reports be customized?**
    a. No, currently the available reports are not customizable.

4. **How often is report data updated?**
    a. Reports data are updated in real time.

5. **Can reports be scheduled and emailed to me?**
    a. At this time reports may only be run through the operations portal and cannot be scheduled to be sent via email. Users may export the report data to include in an email.

6. **Can reports be imported into another software.**
    a. Reports can be exported in various methods to be imported into other software systems.