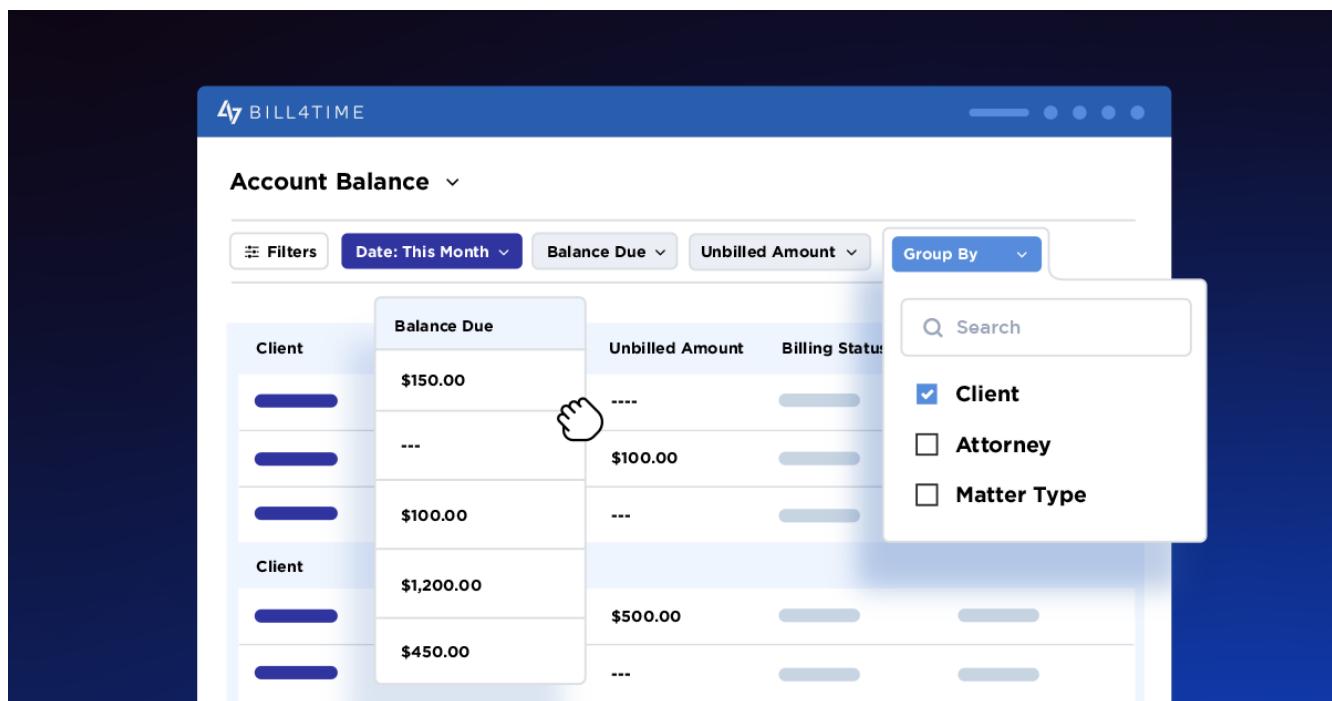


# Take Greater Control of Your Firm's Data with Bill4Time's New Advanced Customizable Reports



Most law firms don't have a data problem; they have a visibility problem. Time, expenses, billing, and client activity are all tracked, but too often that information is scattered across separate systems and static spreadsheets.

With Bill4Time's **new Advanced Customizable Reports**, law firms can bring productivity, profitability, and cash flow data together in one place, analyzing performance from every angle in real time.

## One Reporting Engine, Endless Ways to Analyze Your Firm's Performance

[Bill4Time reports](#) have always provided reliable, intuitive visibility into firm performance. Now, with Advanced Customizable Reports, Legal Pro and Enterprise users gain a new level of control over how that data is viewed, filtered, and analyzed.

Advanced Reports are built to adapt to the way your firm works. With flexible customization, you can easily shape reports around your workflows, KPIs, and decision-making needs by:

- Filtering results dynamically to surface actionable insights instantly
- Grouping data by client, matter, user, date, or other criteria to view performance from every angle
- Adding, removing, and rearranging columns to focus on what matters most
- Simplifying complex data by collapsing rows and removing unnecessary noise
- Incorporating custom fields into reports to track data unique to your firm's processes (*exclusively for Enterprise plans*)

Now, let's explore the reports that make up the full Advanced Customizable Reports suite, and the questions each one helps you answer.

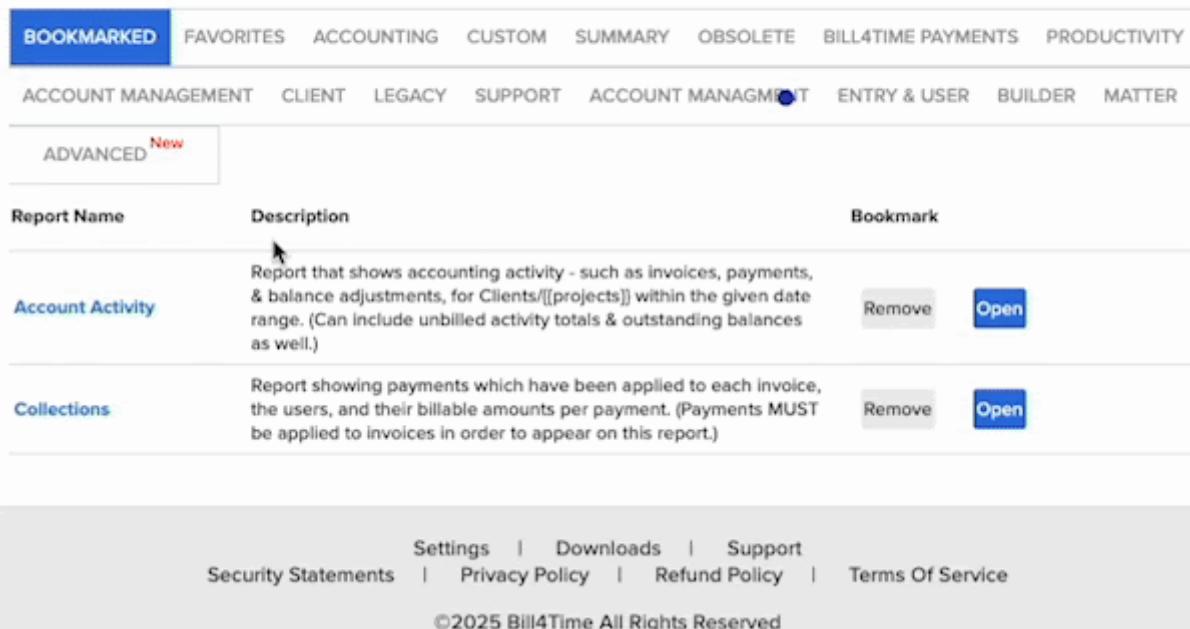
## **Summary Reports: A Real-Time Snapshot of Firm Productivity and Cash Flow**

Bill4Time's **Advanced Summary Reports** bring your firm's critical performance data together, helping you identify trends, risks, and opportunities before they impact the bottom line. With advanced customization, firms can analyze this data faster and with greater clarity:

- **Summary Report** - Compare time, expenses, and billable amounts across clients and matters to uncover productivity trends and profitability insights
- **WIP Summary** - Instantly identify all billable work in progress, whether unbilled or sitting on pre-bill invoices, so cash flow never comes as a surprise
- **Unbilled Summary** - Reveal overlooked time and expenses to ensure all billable work is captured and invoiced promptly

These reports enable firm leaders to answer "*How are we performing right now, and where should we take action?*"

## Reports



Report Name	Description	Bookmark
Account Activity	Report that shows accounting activity - such as invoices, payments, & balance adjustments, for Clients/[[projects]] within the given date range. (Can include unbilled activity totals & outstanding balances as well.)	<a href="#">Remove</a> <a href="#">Open</a>
Collections	Report showing payments which have been applied to each invoice, the users, and their billable amounts per payment. (Payments MUST be applied to invoices in order to appear on this report.)	<a href="#">Remove</a> <a href="#">Open</a>

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## Client & Matter Reports: Understand Who's Driving Revenue

Once you understand firm-wide performance, the next step is to identify who and what is driving those results. Bill4Time's **Advanced Client & Matter Reports** provide deeper insight into client trends, workload distribution, and the types of work that generate the most value for your firm.

These reports make it easier to spot growth opportunities and key details that determine overall profitability:

- **Monthly Summary** – Analyze time, expenses, and billable amounts grouped by month, client, and matter, with flexible multi-column grouping to compare performance across users and time periods
- **Client List** – View and organize your entire client roster with searchable, filterable data
- **Client Creation** – Track new clients over time to measure intake trends and overall firm growth
- **Client/Matter Type** – See billable time and amounts grouped by client or matter type to identify which areas of your practice are driving revenue
- **Matter Creation** – Monitor newly opened matters to manage incoming work and allocate resources more efficiently

- **Matter Details** – Drill into individual matters to view key information at a glance and make informed decisions faster

Together, these reports help firms move beyond surface-level metrics and truly understand how client and matter activity impacts long-term success.

Report Name	Description	Bookmark	
Monthly Summary	...	Bookmark	<a href="#">Open</a>
Client List	...	Bookmark	<a href="#">Open</a>
Client Creation	...	Bookmark	<a href="#">Open</a>
Summary Report	...	Bookmark	<a href="#">Open</a>
WIP Summary	...	Bookmark	<a href="#">Open</a>

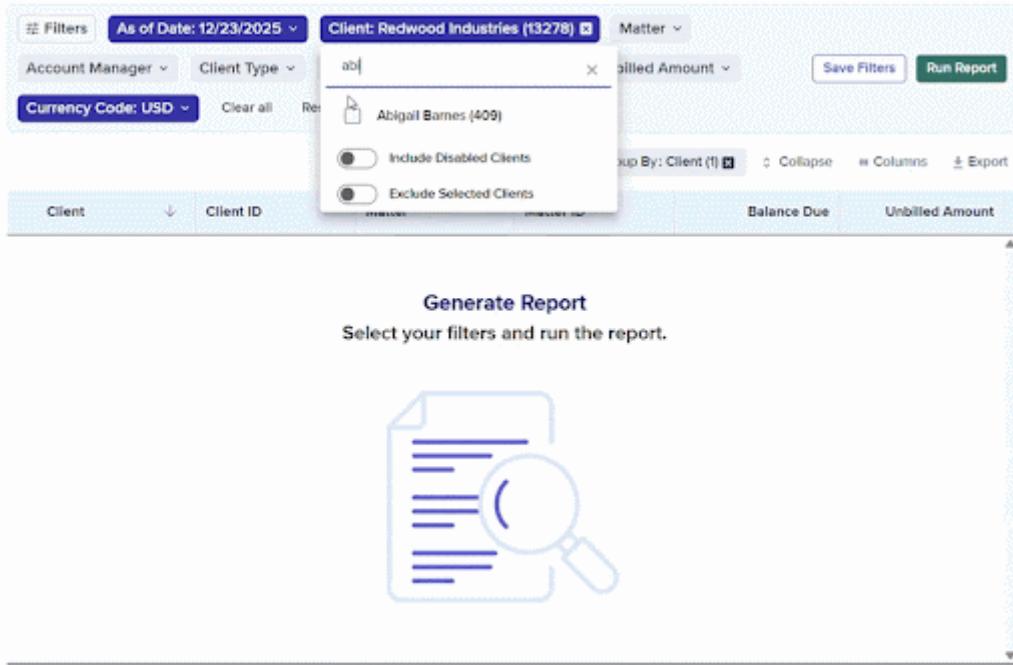
## Financial Reports: Clear Visibility Across Billing, Payments, & Accounts Receivable

Understanding your firm's financial health requires more than knowing what was billed last month. To manage finances with confidence, firm leaders need clear insight into how money moves across every client and matter.

Bill4Time's **Advanced Financial Reports** bring all billing and payment data into one clear view. With reports like Account Balance, Account Activity, Accounting Totals, and Invoice AR Aging, firms can analyze historical financial activity across every case and client in their firm.

These insights go far beyond basic financial totals and instead can help reveal how efficiently a firm converts work into revenue. Instead of manually piecing

together spreadsheets, firms can quickly spot trends, drill into specific entries, and make informed decisions that allow firms to both improve cash flow and long-term profitability.



Filters As of Date: 12/23/2025 Client: Redwood Industries (13278) Matter

Account Manager Client Type

Currency Code: USD Clear all Refresh

Client ID

Client: Redwood Industries (13278)

abj

Abigail Barnes (409)

Include Disabled Clients

Exclude Selected Clients

Group By: Client (1)  Collapse  Columns  Export

Balance Due Unbilled Amount

Generate Report

Select your filters and run the report.



## Turn Your Firm's Data Into Insights with Advanced Customizable Reports

Bill4Time's Advanced Customizable Reports empower firms to make full use of the data they're already generating every day. By bringing time, billing, client, matter, and accounting data into a comprehensive, flexible reporting experience, firms gain the clarity needed to easily see what's driving productivity and profitability, all in one platform.

With completely customizable views tailored to your workflows, you can answer critical business questions in real time and keep your team aligned around the metrics that matter most.

**Ready to see the Advanced Reports in action?** [Start your free trial](#) to explore Bill4Time's full suite of Advanced Customizable Reports and see how Legal Pro and Enterprise users are unlocking deeper insights and running more predictable, profitable practices today.