Read the partner reports

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The partner reports put the firm's numbers on one page: what's been billed and paid, what's still owed, work in progress, time against target, and where new matters came from.

Before you start
Partner reports are for Desk admins, with the **Billing** or **Time** pack on. Money figures need **Billing**.

1 Open the reports

Go to **Reports**

Press **Partner reports**.

2 Pick the period

Choose **This financial year**, **Last financial year**, **The last three months**, **This month** or **Last month**. For anything else, choose **Choose the days**, set **From** and **To** and press **Show**.

3 Read the totals

The top of the page gives **Billed**, **Owed now**, **Work in progress**, **Profit on matters**, **Time recorded** against the target, and **New matters**.

4 Look closer

Further down:

- **What's owed, by age**
- **Fee earners**
- **Teams** and **Types of work**
- **What each matter made**
- **Key dates** coming up, and **Where new matters came from**
- **Undertakings and complaints** still open, with the **Legal practice** pack

Press **CSV** beside any table to take it into a spreadsheet.

5 Have them emailed each month

Under **Monthly email**, tick who should get last month's numbers on the first of each month, and press **Save**.

Making profit figures right

Profit uses what each person's hour costs the firm. An admin sets it in **Settings**, under **Bills and rates**, as **What their hour costs the firm** and against each grade.

If something goes wrong

It says partner reports are for Desk admins.
Ask one of your Desk admins for a copy, or to make you an admin.