PracticeMaster Sample Reports

Version 17 (January 2014)

PracticeMaster Sample Reports

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Optional Report Footer

The software can be configured to include an optional footer on the reports. The footer includes the day of the week, date, and time the report is printed. You can optionally include a horizontal ruling line and the initials of the User ID who prints the report.

The footer is configured at the printer level for each workstation in the Advanced Printing Options window *(File | Print Setup | Advanced Printing Options)*.

The following is an example of a footer with the user initials and horizontal ruling line.

DKH	*Thursday 10/15/2014 1:55pm*

Area of Practice List

Date: 11/17/2014	**Area of Practice List** Burns, Jensen & Powers, P.C.			Page: 1

Name	Description	Files	Document Path
CMSYSTEM	System Files	17	CMSYSTEM\DOCS\
WC	Workers' Compensation	8	WC\DOCS\
FAMILY	Family Law	11	FAMILY\DOCS\
PI	Personal Injury Law	10	PI\DOCS\
ADMIN	Administrative/Personnel	3	ADMIN\DOCS\
BUSLAW	Business Law	12	BUSLAW\DOCS\
CRIMLAW	Criminal Law	7	CRIMLAW\DOCS\
FORECLOS	Foreclosure Law	10	FORECLOS\DOCS\
PROBATE	Probate Law	20	PROBATE\DOCS\
REALEST	Real Estate Law	8	REALEST\DOCS\
WILLS	Wills and Trusts Law	17	WILLS\DOCS\

Menu   *Maintenance | File Maintenance | Print AOP List*

The Area of Practice List is accessed via File Maintenance by right-clicking **System Files** and selecting **Print AOP List**. This report includes all of the Areas of Practice present in PracticeMaster. This report cannot be modified.

Category List

Report Writer Name   *CATEGORY*

The Category List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all categories present in PracticeMaster. It can be generated in alphabetical order based on the category description or numerical order based on the category number.

11/17/2014	PracticeMaster Numerical Category List Burns, Jensen & Powers, P.C.		Page: 1

Category Number	Code Set	Description
1		Personal Injury
5		Wills/Trusts/Estates
10		Workers' Compensation
15	P	Probate
20		Tax Law
25	B	Real Estate
30	B	Foreclosure
35		Family Law
40		Business Law
45		Trademarks/Copyrights/Patents
50		Criminal Law
55	L	Insurance Defense
60	L	General Litigation

11/17/2014	PracticeMaster Alphabetical Category List Burns, Jensen & Powers, P.C.		Page: 1

Category Number	Code Set	Description
40		Business Law
50		Criminal Law
35		Family Law
30	B	Foreclosure
60	L	General Litigation
55	L	Insurance Defense
1	B	Personal Injury
15	P	Probate
25		Real Estate
20		Tax Law
45		Trademarks/Copyrights/Patents
5		Wills/Trusts/Estates
10		Worker's Compensation

Timekeeper List

Report Writer Name   *TMKRLIST*

The Timekeeper List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all timekeepers present in PracticeMaster. An * next to the timekeeper's name indicates the timekeeper is marked as an inactive timekeeper. It can be generated in alphabetical or numerical order. The alphabetical list sorts the timekeepers in alphabetical order by last name.

Numeric Timekeeper List
Burns, Jensen & Powers, P.C.

Timekeeper Number	Init.	Name	Rate
1	RJB	Robert J Burns	250.00
2	MLJ	Michael L. Jensen	225.00
3	PAM	Paula A. Madison	160.00
4	DHB	Daniel H. Brady	175.00
5	JPP	*Julie P. Powers	140.00

Location List

Date: 11/17/2014   **Location File List**   Page: 1
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Location ID	Description
Columbus	Columbus Office
Kearney	Kearney Office
Lincoln	Lincoln Office
Omaha	Omaha Office

Report Writer Name   *LOCATION*

The Location List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all locations present in PracticeMaster.

Text Macro List

Report Writer Name   *MACRO*

The Text Macro List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all text macros present in PracticeMaster.

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Macro ID	Text
ATT	attended
CA	court appearance
CF	courier fee
COM	communicate with
DAR	draft and revise
DOM	*Petition for Dissolution of Marriage* and related documents
EN	enclosure
FF	filing fee
INT	interrogatories
INTDOC	*Interrogatories* and *Request for Production of Documents*
INV	investigation of
LD	long distance telephone charges
LR	legal research
LT	letter to
LWT	*Last Will and Testament*
MED	medical records
ML	mileage to/from
MSJ	*Motion for Summary Judgement*
NOA	*Notice of Appearance*
NONPAY	concerning outstanding balance. Discussed the possibility of setting up a monthly payment schedule. Confirmed that no additional work will be performed until a good faith payment is made toward the outstanding balance.
OC	office conference with
OLR	online legal research
OPF	outside professional fee
OPP	opposing counsel
OPPDOC	opposing counsel regarding discovery and production of documents
OSC	outside conference with
PNG	*Plea of Not Guilty*
PP	plan and prepare for
RA	review and analyze
RO	receipt of
SETT	terms of settlement and receipt of settlement check
SF	sheriff's fee
TC	telephone conference with
TDS	to discuss current status and issues relating to the case.
TE	trial exhibits
TEX	travel expense

Tcode	Alpha Code	Description
1	OC	Office conference with
2	OS	Outside conference with
3	TC	Telephone conference with
4	OF	Open file
5	LT	Letter to
6	RE	Receipt of
7	PP	Plan and prepare for
8	DA	Draft and revise
9	RA	Review and analyze
10	LR	Legal research
11	CA	Court appearance
12	INV	Investigation of
13	ATT	Attended
14	CO	Communicate with
15	UP	Update files/records
16	PF	(progress fee)
17	DES	(description only)
18	MIS	(miscellaneous fee)
50	LD	Long distance telephone charges
51	CO	Photocopy charges
52	ML	Mileage to/from
53	PO	Postage
54	TEX	Travel expense
55	FAX	Facsimile costs
56	ME	(miscellaneous expense)
70	FF	Filing fee
71	PR	Processor fee
72	CF	Courier fee
73	OPF	Outside professional fee
74	ME	Medical records
75	SF	Sheriff's fee
76	OLR	Online legal research
77	TRA	Transcription fees
78	EX	Trial exhibits
79	MA	(miscellaneous advance)
90	PY	Payment
91	FPY	Fee Payment
92	EPY	Expense Payment
93	APY	Advance Payment
94	FCC	Credit for finance charge billed
95	DEP	Deposit to client funds
96	WIT	Withdrawal from client funds

Transaction Code List

Report Writer Name   *TCODE*

The Transaction Code List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all transaction codes present in PracticeMaster. It can be generated in alphabetical or numerical order.

Phase Activity ID	Tcode	Description
A101	7	Plan and prepare for
A102	10	Research
A103	8	Draft/revise
A104	9	Review/analyze
A105	14	Communicate (within legal team)
A106	14	Communicate (with client)
A107	14	Communicate (opponents/other outside counsel)
A108	14	Communicate (other external)
A109	13	Appear for/attend
A110	15	Manage data/files/documentation
A111	18	Other
A112	254	Billable Travel Time
A113	14	Communicate (witnesses)
A114	14	Communicate (experts)
A115	15	Medical Record and Medical Bill Management
A116	10	Training
A117	15	Special Handling Copying/Scanning/Imaging (Internal)
A118	12	Collection-Forensic
A119	15	Culling & Filtering
A120	15	Processing
A121	15	Review and Analysis
A122	9	Quality Assurance and Control
A123	10	Search Creation and Execution
A124	15	Privilege Review Culling and Log Creation
A125	8	Document Production Creation and Preparation
A126	7	Evidence/Exhibit Creation and Preparation
A127	7	Project Management
A128	9	Collection Closing Activities
B100	0	Administration
B110	0	Case Administration
B120	0	Asset Analysis and Recovery
B130	0	Asset Disposition
B140	0	Relief from Stay/Adequate Protection Proceedings
B150	0	Meetings of and Communications with Creditors
B160	0	Fee/Employment Applications
B170	0	Fee/Employment Objections
B180	0	Avoidance Action Analysis
B185	0	Assumption/Rejection of Leases and Contracts
B190	0	Other Contested Matters (excluding assumption/rejection motions)
B195	0	Non-Working Travel
B200	0	Operations
B210	0	Business Operations
B220	0	Employee Benefits/Pensions
B230	0	Financing/Cash Collections
B240	0	Tax Issues
B250	0	Real Estate
B260	0	Board of Directors Matters
B300	0	Claims and Plan
B310	0	Claims Administration and Objections
B320	0	Plan and Disclosure Statement (including Business Plan)
B400	0	Bankruptcy-Related Advice
B410	0	General Bankruptcy Advice/Opinions
B420	0	Restructurings

Task Code List

Report Writer Name   *TASKCODE*

The Task Code List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all task codes present in PracticeMaster.

Calendar Code List

Report Writer Name   *CAL_CODE*

The Calendar Code List is a Report Writer report included with PracticeMaster and can be modified as desired. This report displays all calendar codes present in PracticeMaster.

Date: 11/17/2014   **Calendar Code List**   Page: 1
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Cal Code	Desc
AD	Answer to complaint due
Anniv	Anniversary
Appoint	Appointment with
Attend	Attend
BDAY	Birthday
Bk	Breakfast
BL	Business luncheon with
CA	Court appearance
CD	Closing Date
CI	Confirmation of Issues
CLE	Continuing Legal Education
CM	Client Meeting
Con	Continuance
Cons	Consultation
CS	Confirmation of Service
DC	Discovery Cutoff
DD	Discovery Due
Dep	Deposition of
Dinner	Dinner with
DPM	Deadline for Hearing Dispositive Pretrial Motions
DPW	Disclosure of Possible Primary Witnesses
DRW	Disclosure of Possible Rebuttal Witnesses
EL	Exchange of Witness/Exhibit Lists
FC	File Complaint
FD	Filing Deadline
Firm	Firm Meeting
FM	File Motion
Foll	Follow up with
Hearing	Hearing
ICM	Initial Client Meeting
IO	Investigation of
JSE	Joint Statement of Evidence
Jury	Jury Selection
LD	Limitation Date
LR	Legal research
LT	Letter to
Lunch	Luncheon with
Med	Mediation
Memo	Send memo to
Misc	Miscellaneous
MW	Meeting with
MWC	Meeting with client
OC	Office conference with
Out	Out of Office
OutCW	Outside conference with
PC	Pretrial Conference
PE	Personal Event
PM	Partners Meeting
Prep	Prepare for
PT	Personal Task
RD	Renewal date

Date: 11/17/2014   **Calendar Code List**   Page: 2
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Cal Code	Desc
Research	Research
Rev	Review
SCW	Status conference with
Sem	Seminar
Sick	Sick Time
SM	Settlement Meeting
TaxesDue	Tax Return Deadline
TCD	Trial Confirmation Date
TCW	Telephone conference with
TD	Trial Date
TP	Tax Planning
trial	In trial at
TT	Travel Time
Vac	Vacation Time

Master Client List

Report Writer Name   **_CLNTLST**

The Master Client List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all clients present in PracticeMaster. The report can be generated for a range of Client IDs and primary timekeepers. It can optionally be printed in primary timekeeper order. Clients are listed in Client ID order. Drill-down editing capabilities allow you to edit records directly from the Preview window.

```
Date: 11/17/2014                          Master Client List                                    Page: 1
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Client Range:        100.00 to  200.03
Timekeeper Range:      1  to   999

Dawson/Charles L.
27550 Cottonwood Drive
San Bernadino, CA  92408
            100.00   REALEST   Settlement of Grandfather's Estate        Chuck Dawson       714-884-7525    JPP

Barrett/Karen
3010 South 14th Street
Lincoln, NE  68510
            101.00   REALEST   Apartment Management                      Karen Barrett      402-466-1234    DHB

Richardson/Harold
1548 West 57th Street
Rochester, NY  14603-8409
            102.00   BUSLAW    Manage personal finances                  Harold Richardson  716-253-4510    RJB

Jefferson Insurance Co.
American Charter Building
9th & West 'O' Streets
Suite 220
Lincoln, NE  68510-6330
            200.01   PI        Automobile Accident                       Mike Johnson       402-464-2200    RJB

Jefferson Insurance Co.
American Charter Building
9th & West 'O' Streets
Suite 220
Lincoln, NE  68510-6330
            200.02   BUSLAW    Hail Damage - Palmer farm                 Mark Allen         402-464-2200    RJB
```

Area of Practice Client List

Report Writer Name   **AOP_CLNT**

The Area of Practice Client List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all clients and can be displayed in alphabetical or numerical order. This report can be generated for a specified range of Clients IDs, Areas of Practice, timekeepers and open dates. Clients can optionally be sorted by Area of Practice and timekeeper. Drill-down editing capabilities allow you to edit records directly from the Preview window.

```
Date: 11/17/2014                       Area of Practice Client List                             Page: 1
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Client Range:        100.00  to  900.00                    Client Order:          Numerical
Area of Practice Range:   ADMIN  to  REALEST               Area of Practice Order:      Yes
Timekeeper Range:        1  to  999                        Timekeeper Order:            No
Date Range:     mm/dd/yyyy    to  mm/dd/yyyy

Area of Practice: BUSLAW - Business Law
```

Client ID	AOP	Client Name	Description	Date Opened	Pri Tkp
102.00	BUSLAW	Richardson/Harold	Manage personal finances	05/10/2014	RJB
200.03	BUSLAW	Jefferson Insurance Co.	Acquisition of Mid-State Insurance	07/01/2014	RJB
200.02	BUSLAW	Jefferson Insurance Co.	Hail Damage - Palmer farm	06/10/2014	RJB
350.00	BUSLAW	Carter/Arthur J.	Protection of New Wave Patent	07/21/2014	MLJ

Area of Practice: FAMILY - Family Law

Client ID	AOP	Client Name	Description	Date Opened	Pri Tkp
850.00	FAMILY	White/Kelly	Divorce	10/03/2014	DH
900.00	FAMILY	Sherman/Natalie K.	Divorce	10/04/2014	DH

Area of Practice: PI - Personal Injury Law

Client ID	AOP	Client Name	Description	Date Opened	Pri Tkp
200.01	PI	Jefferson Insurance Co.	Automobile Accident	06/02/2014	RJB
600.00	PI	Ace Manufacturing Company	General Legal Counsel	09/06/2014	MLJ

Area of Practice: REALEST - Real Estate Law

Client ID	AOP	Client Name	Description	Date Opened	Pri Tkp
100.00	REALEST	Dawson/Charles L.	Settlement of Grandfather's Estate	04/01/2014	JPP
101.00	REALEST	Barrett/Karen	Apartment Management	05/02/2014	DH

Total Clients: 10

Alphabetical Client List

Report Writer Name   *CLNTLIST*

The Alphabetical Client List is a Report Writer report included in PracticeMaster and can be modified as desired. This list can be generated for a specified range of Client IDs. Clients are listed in alphabetical order and files for each client are listed in Client ID order. This list can be printed for active clients, inactive clients or both. The report shown above is printed for both. When both inactive and active clients are included on the report, an asterisk is printed after the Client ID for those clients that are inactive. A footer is displayed at the end of the report indicating the number of clients and text regarding the asterisk and inactive clients. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014   Alphabetical Client List   Page: 1
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Client Name	Client ID	Description
ABC Insurance Company	800.00	Death Benefits
Able/Paul & Mary	450.00	Parent's Estate
Ace Manufacturing Company	600.00	General Legal Counsel
Ace Manufacturing Company	600.01	Workers' compensation claim
Ace Manufacturing Company	600.02	Maintenance of insurance policies
Barrett/Karen	101.00	Apartment Management
Carter/Arthur J.	350.00	Protection of New Wave Patent
Dawson/Charles L.	100.00	Settlement of Grandfather's Estate
Federated Casualty, Ltd.	550.00	Andrew C. Gilbert v. Federated Casualty
First National Bank	700.00	General File
Harrison Investments	750.00	Purchase of Real Estate
Harrison/Bradley	751.00	Purchase of Real Estate
Jefferson Insurance Co.	200.01*	Automobile Accident
Jefferson Insurance Co.	200.02	Hail Damage - Palmer farm
Jefferson Insurance Co.	200.03	Acquisition of Mid-State Insurance
Kiltzer/George	402.00	Set up trust for children
Lutz/Jody	400.00	Manage trust account for Jody
Lyons/Mr. & Mrs. Art	500.00*	Audit of Federal Income Taxes
Martin/Mary L. & Fred J.	103.00	Private Adoption
McBride/John	300.00*	Management of Estate Trust
Richardson/Harold	102.00*	Manage personal finances
Sherman/Natalie K.	900.00	Divorce
White/Kelly	850.00	Divorce

Total Clients: 23

An asterisk (*) printed after the Client ID indicates the client is inactive.

Client Mailing Labels

Report Writer Name   *LABEL1X4*

Client mailing labels can be generated using the Report Writer included with PracticeMaster with a 1" by 4" label format. This report is sorted by zip code in Client Name order and allows you to specify a range of Client IDs. As with all Report Writer reports, you can modify this report to meet your needs. For example, you can add a Selection Expression to only select specified clients. Or, as another example, you can add a Selection Expression to only select clients whose **Date Opened** field is greater than 01/01/14.

```
○   ┌──────────────────────────────────┐   ○
    │  Richardson/Harold               │
    │  1548 West 57th Street           │
○   │  Rochester  NY  14603-8409       │   ○
    └──────────────────────────────────┘

○   ┌──────────────────────────────────┐   ○
    │  Martin/Mary L. & Fred J.        │
    │  4200 Goldenrod Circle           │
○   │  Omaha  NE  68113                │   ○
    └──────────────────────────────────┘

○   ┌──────────────────────────────────┐   ○
    │  Klein/Daniel P.                 │
    │  795 North Apple                 │
○   │  Greenwood  NE  68366            │   ○
    └──────────────────────────────────┘

○   ┌──────────────────────────────────┐   ○
    │  Carter/Arthur J.                │
    │  4920 Everett                    │
○   │  Lincoln  NE  68503              │   ○
    └──────────────────────────────────┘

○   ┌──────────────────────────────────┐   ○
    │  McBride/John                    │
    │  Eastmont Towers                 │
    │  2920 Northwest Greenbriar Lane  │
○   │  Lincoln  NE  68505              │   ○
    └──────────────────────────────────┘
```

Client List by Primary Timekeeper

Report Writer Name   *CLNT_TK*

The Client List by Primary Timekeeper is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a specified range of Client IDs and primary timekeepers. Clients are sorted by primary timekeeper and are listed in Client ID order. A count of clients is displayed for the entire report as well as a subtotal count for clients for each primary timekeeper. When including a subtotal count on a report, a separate Count column must be used. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014   **Client List by Primary Timekeeper**   Page: 1
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Client Range: 100.00 to   900.00
Timekeeper Range: 1 to   2

Timekeeper: 1   Robert J. Burns

Client ID	Client Name	Description	Count
102.00	Richardson/Harold	Manage personal finances	1
103.00	Martin/Mary L. & Fred J.	Private Adoption	1
200.01	Jefferson Insurance Co.	Automobile Accident	1
200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm	1
200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance	1
300.00	McBride/John	Management of Estate Trust	1
450.00	Able/Paul & Mary	Parent's Estate	1
550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty	1
700.00	First National Bank	General File	1
800.00	ABC Insurance Company	Death Benefits	1
Client Count			10

Timekeeper: 2   Michael L. Jensen

Client ID	Client Name	Description	Count
350.00	Carter/Arthur J.	Protection of New Wave Patent	1
600.00	Ace Manufacturing Company	General Legal Counsel	1
600.01	Ace Manufacturing Company	Workers' compensation claim	1
600.02	Ace Manufacturing Company	Maintenance of insurance policies	1
Client Count			4
Total Clients			14

List of Client's Birthdays

Report Writer Name   *_BIRTHDY*

The List of Client's Birthdays is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a specified range of Client Names and months. Clients are sorted by birthday month. A count of birthdays is displayed for the entire report.

Date: 11/17/2014   **List of Client's Birthdays**   Page: 1
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January   thru   December

Birthday	Client Name	Age
01/02/1945	Barrett/Karen	69
04/28/1943	Sherman/Natalie K.	71
06/07/1953	McBride/John	61
09/09/1971	Richardson/Harold	43
11/07/1967	Dawson/Charles L.	47
12/06/1978	Carter/Arthur J.	35

Number of Birthdays = 6

Client Referral Report

Report Writer Name   *REFERRAL*

The Client Referral Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes referred clients sorted by Area of Practice and are displayed in Client ID order. This report can be generated for a specified range of Client IDs, Areas of Practice, referral names and open dates. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014   **Client Referral Report**   Page: 1
                                          Burns, Jensen & Powers, P.C.

Client Range: 100.00 to 900.00
Area of Practice Range: ADMIN to   WILLS
Referral Range: AAA   to   ZZZ
Date Opened Range: 01/01/2014   to   07/01/2014

BUSLAW - Business Law

Client ID	Client Name	Date Opened	Referred By
200.02	Jefferson Insurance Co.	06/09/2014	Farmer's Mutual Health & Life Ins
102.00	Richardson/Harold	05/12/2014	Knight/Elizabeth M.
200.03	Jefferson Insurance Co.	06/27/2014	Lewis/Joseph M.

PI - Personal Injury Law

Client ID	Client Name	Date Opened	Referred By
200.01	Jefferson Insurance Co.	06/02/2014	Farmer's Mutual Health & Life Ins

REALEST - Real Estate Law

Client ID	Client Name	Date Opened	Referred By
100.00	Dawson/Charles L.	04/04/2014	Brown/Stephanie J.
101.00	Barrett/Karen	05/02/2014	Murray/Alex J.

Litigation Analysis

Report Writer Name   *ANALYSIS*

The Litigation Analysis report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes Client IDs sorted by Area of Practice and are displayed in Client ID order. This report can be generated for a specified range of Client IDs, Areas of Practice and close dates. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014   **Litigation Analysis**   Page: 1
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Client Range: 100.00 to 900.00
Area of Practice Range: ADMIN to   WILLS
Date Closed Range: 01/01/2014   to   11/01/2014

BUSLAW - Business Law

Client ID	Client Name	Description	Date Opened	Date Closed	Days In Litigation	Months In Litigation
102.00	Richardson/Harold	Manage personal finances	05/09/2014	08/01/2014	83	2.7
Area of Practice Average					83	2.7

FORECLO - Foreclosure Law

Client ID	Client Name	Description	Date Opened	Date Closed	Days In Litigation	Months In Litigation
300.00	McBride/John	Management of Estate Trust	07/15/2014	11/01/2014	109	3.6
Area of Practice Average					109	3.6

PI - Personal Injury Law

Client ID	Client Name	Description	Date Opened	Date Closed	Days In Litigation	Months In Litigation
200.01	Jefferson Insurance Co.	Automobile Accident	06/02/2014	10/31/2014	152	5.0
Area of Practice Average					152	5.0
Average Litigation					115	3.8

Blank Client ID Calendar Records

Report Writer Name _BLANKID

The Blank Client ID Calendar Records report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records without an assigned Client ID. This report can be generated for a specified range of due dates.

10/03/2014 Friday

Start Time	Stop Time	User	Type	Completed	Description	Location
12:00 AM	11:59 PM	MLJ	E		Vacation	

10/06/2014 Monday

Start Time	Stop Time	User	Type	Completed	Description	Location
08:00 AM	hh:mm AM	JEN	T	10/10/2014	Birthday	
09:00 AM	11:00 AM	CLB	E		Partners meeting	
09:00 AM	11:00 AM	MLJ	E		Partners meeting	
09:00 AM	11:00 AM	RJB	E		Partners meeting	
02:30 PM	04:30 PM	RJB	E		Meeting with Harold Berk in Conference Room.	

10/07/2014 Tuesday

Start Time	Stop Time	User	Type	Completed	Description	Location
10:15 AM	11:30 AM	MLJ	E		Meeting with Robert Maxwell	
12:00 PM	01:00 PM	RJB	E		Luncheon with Steve	P.F. Chang's

10/08/2014 Wednesday

Start Time	Stop Time	User	Type	Completed	Description	Location
08:00 AM	10:00 AM	PA	E		Meeting with Mike Johnson	
11:30 AM	12:45 PM	CLB	E		Business luncheon.	The Knoll's
12:00 PM	01:15 PM	JEN	E		Luncheon with daughter.	
03:00 PM	04:30 PM	MLJ	E		Appointment with Jim Tucker.	

10/09/2014 Thursday

Start Time	Stop Time	User	Type	Completed	Description	Location
08:45 AM	11:45 AM	CLB	E		Firm Meeting	
08:45 AM	11:45 AM	JEN	E		Firm Meeting	
08:45 AM	11:45 AM	MLJ	E		Firm Meeting	
08:45 AM	11:45 AM	RJB	E		Firm Meeting	
12:00 PM	01:00 PM	RJB	E		Business luncheon with John Williams.	
01:45 PM	03:00 PM	MLJ	E		Appointment with Robert Maxwell	
03:30 PM	05:00 PM	JEN	E		Outside conference with Julie Thomas.	

10/10/2014 Friday

Start Time	Stop Time	User	Type	Completed	Description	Location
12:00 AM	11:59 PM	MLJ	E		Vacation	

Client Calendar

Report Writer Name _CLNTCAL

The Client Calendar report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records sorted by Client ID. This report can be generated for a specified range of Client IDs, due dates and user IDs. You can specify which calendar Types to include on the report (i.e., E-event, T-task). This report can also be generated for "incomplete entries only." For purposes of this report, an incomplete entry is defined as a task calendar record without a date in the **Date Completed** field or an event with a **Due Date** within the specified date range.

Date: 11/17/2014   **Client Calendar**   Page: 1

Client Range:	200.02 to 200.02	Calendar Type(s):	E,T
Due Date Range:	10/01/2014 to 10/18/2014	Incomplete Entries Only:	No
User Range:	to ZZZ		

200.02 Peterson Insurance Co.	Area of Practice:	ADMIN
Maintenance of Insurance Policies	Primary Timekeeper:	RP

10/13/2014	Monday		
01:00 PM	JEN	Office conference with Richard Jackson.	
10/14/2014	Tuesday		
	RON	Preparation of proposal for Mid-State Insurance Company.	Completed: 10/15/2014
01:15 PM	JEN	Appointment with Paul Franklin. Omaha Office	
10/17/2014	Friday		
11:30 AM	CHERYL	Meeting with Paul.	
11:30 AM	RON	Meeting with Paul.	
10/21/2014	Tuesday		
11:00 AM	RON	Filing Deadline	Incomplete Task

Calendar by Due Date

Report Writer Name   *_CALDUE*

The Calendar by Due Date report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records sorted by due date. You can specify a range of Client IDs, due dates, and user IDs as well as which calendar types to include on the report (i.e., E-event, T-task). This report can also be generated for "incomplete entries only." For purposes of this report, an incomplete entry is defined as a task calendar record without a date in the **Date Completed** field or an event with a **Due Date** within the specified date range. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014   **Calendar by Due Date**   Page: 1

Case Range: 200.02   to   Calendar Type(s): E,T
Due Date Range: 10/01/2014   to   10/31/2014   Incomplete Entries Only: No
User Range: to   ZZZ

10/06/2014 Monday

Time	User	Type	Completed	Description
01:00 PM	JEN	E		Office conference with Richard Jackson.
				Client ID: 200.02 Peterson Insurance Co.
				AOP: ADMIN Maintenance of Insurance Policies

10/07/2014 Tuesday

Time	User	Type	Completed	Description
hh:mm AM	RON	T	10/12/2014	Preparation of proposal for Mid-State Insurance Company.
				Client ID: 200.02 Peterson Insurance Co.
				AOP: ADMIN Maintenance of Insurance Policies
01:15 PM	JEN	E		Appointment with Paul Franklin.
				Location: Omaha Office
				Client ID: 200.02 Peterson Insurance Co.
				AOP: ADMIN Maintenance of Insurance Policies

10/10/2014 Friday

Time	User	Type	Completed	Description
11:30 AM	CHERYL	E		Meeting with Paul.
				Client ID: 200.02 Peterson Insurance Co.
				AOP: ADMIN Maintenance of Insurance Policies
11:30 AM	RON	E		Meeting with Paul.
				Client ID: 200.02 Peterson Insurance Co.
				AOP: ADMIN Maintenance of Insurance Policies

Calendar by User

Report Writer Name   *_CALUSER*

The Calendar by User report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records sorted by user. You can specify a range of Client IDs, due dates and user IDs as well as which calendar types to include on the report (i.e., E-event, T-task). Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014   **Calendar by User**   Page: 1

Case Range: 100.00   to 200.02   Calendar Type(s):   E,T
User Range: MLJ   to MLJ
Date Range: 10/01/2014   to   10/31/2014

User: Michael L. Jensen

Wednesday	10/09/2014	09:30 AM	Type: E	Office conference with Arthur Carter	
				Client ID: 101.00 Williams/John	
				AOP: CRIMLAW State v. Williams	
Monday	10/13/2014	09:15 AM	Type: E	Attend meeting with Jim Peterson.	
				Location: Kearney Office	
				Client ID: 200.01 Peterson Insurance Co.	
				AOP: WC General Legal Counsel	
Wednesday	10/15/2014	10:45 AM	Type: E	Appointment with Jim Peterson	
				Client ID: 200.01 Peterson Insurance Co.	
				AOP: WC General Legal Counsel	
Thursday	10/16/2014	11:30 AM	Type: E	Outside conference with John Williams.	
				Location: Hilton	
				Client ID: 101.00 Williams/John	
				AOP: CRIMLAW State v. Williams	
Friday	10/24/2014	11:00 AM	Type: T	Filing Deadline	
				Client ID: 102.00 Federated Casualty, Ltd.	
				AOP: PI Andrew C. Gilbert v. Federated Casualty	

Daily Report

Menu		*Reports	Daily Report*

The Daily Report is a calendar report that can optionally include tasks, events, and reminders. You can specify a date range and specify which users to include. You can optionally include Calendar Comments, Client Name, and the Client Work Description with each Description. Activities can be categorized by 1) Type, then by Date; or 2) by Date, then by Type. You can optionally include overdue tasks and tasks with no Due Date. Completed tasks are not included on this report (i.e., tasks with a date in the Completed Date field). Reports for each specified user will start on a new page. If categorizing activities by Date, then by Type, you can optionally start each date on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window. This report cannot be modified.

The report on the left is sorted by Type, then by Date. The report on the right is sorted by Date, then by Type and also includes the client name and work description.

Left report

Date: 11/17/2014 — **Daily Report** — Jensen, Martin & Anderson, P.C. — Page: 1

Report Date Range: 11/01/2014 thru 11/30/2014
User ID: MLJ

Events

Client ID	Due Date	Day	Start Time	End Time	Description
	11/10/2014	Mon	03:00 PM	04:30 PM	Appointment with Jim Tucker.
	11/13/2014	Thu	08:30 AM	09:00 AM	Initial Client Meeting Enrique Sanchez
200.01	11/14/2014	Fri	09:15 AM	11:00 AM	Attend meeting with Jim Peterson.
	11/17/2014	Mon	09:30 AM	09:45 AM	Appointment with Harry Jones. Potential new client.
200.01	11/17/2014	Mon	10:30 AM	11:45 AM	Appointment with Jim Peterson
200.02	11/24/2014	Mon	08:00 AM	09:30 AM	Meeting with Health USA.
	11/24/2014	Mon	10:15 AM	11:30 AM	Meeting with Robert Maxwell.

Tasks

Client ID	Due Date	Day	Description
102.00	11/18/2014	Tue	Filing Deadline

Reminders

Client ID	Due Date	Day	Start Time	Reminder	Description
	11/17/2014	Tue	09:30 AM	11/11/2014	Appointment with Harry Jones. Potential new client.
	11/24/2014	Sun	10:15 AM	11/16/2014	Meeting with Robert Maxwell.

Right report

Date: 11/17/2014 — **Daily Report** — Jensen, Martin & Anderson, P.C. — Page: 1

Report Date Range: 11/01/2014 thru 11/30/2014
User ID: MLJ

——— 11/10/2014 Mon ———

Events

Client ID	Start Time	End Time	Description
	03:00 PM	04:30 PM	Appointment with Jim Tucker.

——— 11/11/2014 Tue ———

Reminders

Client ID	Due Date	Start Time	Description
	11/17/2014	09:30 AM	Appointment with Harry Jones. Potential new client.

——— 11/13/2014 Thu ———

Events

Client ID	Start Time	End Time	Description
	08:30 AM	09:00 AM	Initial Client Meeting Enrique Sanchez

——— 11/14/2014 Fri ———

Events

Client ID	Start Time	End Time	Description
200.01	09:15 AM	11:00 AM	Attend meeting with Jim Peterson. Peterson Insurance Co. General Legal Counsel

——— 11/16/2014 Sun ———

Reminders

Client ID	Due Date	Start Time	Description
	11/24/2014	10:15 AM	Meeting with Robert Maxwell.

——— 11/17/2014 Mon ———

Events

Client ID	Start Time	End Time	Description
	09:30 AM	09:45 AM	Appointment with Harry Jones. Potential new client.
200.01	10:30 AM	11:45 AM	Appointment with Jim Peterson Peterson Insurance Co.

To Do List

Report Writer Name	*TODO_LST*

The To Do List is a Report Writer report included in PracticeMaster that can be modified as desired. This report includes calendar records sorted by type and by date. You can specify a range of Client IDs, reminder/due dates and user IDs as well as which calendar types to include on the report (i.e., E-event, T-task).

Date: 11/17/2014 — **To Do List** — Page: 1

Client Range:	100.00	to	200.02	Calendar Type(s):	E,T
Due Date Range:	10/17/2014	to	10/31/2014		
User Range:	CHERYL	to	RON		

Events

Date	Time	User	Description
10/14/2014	08:30 AM	RJB	Seminar [100.00 Phillips/Marcus]
	09:15 AM	MLJ	Attend meeting with Jim Peterson. [200.01 Peterson Insurance Co.] Kearney Office
	12:30 PM	JEN	Business luncheon with Mark Phillips. [100.00 Phillips/Marcus]
10/16/2014	08:30 AM	RJB	Seminar [100.00 Phillips/Marcus]
10/17/2014	08:30 AM	RJB	Seminar [100.00 Phillips/Marcus]
	10:45 AM	MLJ	Appointment with Jim Peterson [200.01 Peterson Insurance Co.]
10/22/2014	08:30 AM	RJB	Seminar [100.00 Phillips/Marcus]
	11:30 AM	MLJ	Outside conference with John Williams. [101.00 Williams/John] Hilton
	01:00 PM	JEN	Appointment with Marcus Phillips [100.00 Phillips/Marcus]
10/21/2014	08:00 AM	RJB	Outside conference with John Williams. [101.00 Williams/John]

Tasks

Date	Time	User	Description
10/17/2014	09:00 AM	JEN	File Motion to change venue [101.00 Williams/John]
	11:00 AM	RJB	Filing Deadline [200.02 Peterson Insurance Co.]
10/22/2014	11:00 AM	MLJ	Filing Deadline [102.00 Federated Casualty, Ltd.]

Calendar Plan Template Report

Menu   *Calendar | Calendar Plan Templates | Print Template*

The Calendar Plan Template Report is accessed via the Calendar Plan Templates program by clicking the **Print Template** button when a Calendar Plan Template is highlighted. This report includes the Calendar Plan Template information. This report cannot be modified.

Date: 11/17/2014   **Calendar Plan Template Report**   Page: 1
                                                  Burns, Jensen & Powers, P.C.

Template Name: **Exchange Expert Witnesses**
Description: **Exchange expert witness list**
Area of Practice: **CMSYSTEM**
Venue: **Standard Holidays**

Item	Parent Item	User ID	Type	Interval	Unit	Mail Interval	Mail Unit	Adj	Included Template
Trial Setting			T						
Trial Date	Trial Setting		E	0	D	0	D	Prev BD	None
Secondary Exchange Expert Witness List	Trial Date		T	-70	D	0	D	Prev BD	None
Last court day before Trial for settlement offer	Trial Date		T	-15	D	0	D	Prev BD	None
Request for Jury instructions	Trial Date		T	-1	BD	0	D	Prev BD	None
Last court day for settlement offer -mail	Trial Date		T	0	D	-15	MD	Prev BD	None
Last court day for settlement offer -hand delivry	Trial Date		T	-10	D	0	D	Prev BD	None
Arrange for copy with court reporter (Last Day)	Trial Date		T	-2	W	0	D	Prev BD	None
Must file election to arbitrate by today.	Trial Date		T	-90	D	0	D	Prev BD	None
Exchange Expert Witness List	Trial Setting		T	10	D	0	D	Prev BD	None

---

Calendar Plan Report

Menu   *Calendar | View Calendar Plans | Print Plan*

The Calendar Plan Report is accessed via the View Calendar Plans program by clicking the **Print Plan** button when a Calendar Plan is highlighted. This report includes a list of calendar records generated from a specific Calendar Plan. This report cannot be modified.

Date: 11/17/2014   **Calendar Plan Report**   Page: 1

Template Name: Open New Case
Client ID: 100.00 Phillips/Marcus
              Real Estate Acquisition

Date	Description/Comments	Type	Start Time	End Time	User ID	Client ID	Related Party
09/29/2014	Generate Fee Agreement	T	hh:mm AM	hh:mm AM	CHERYL	100.00	
09/29/2014	Initial Meeting with Client	T	hh:mm AM	hh:mm AM	CHERYL	100.00	
10/03/2014	Open File	T	hh:mm AM	hh:mm AM	CHERYL	100.00	
10/06/2014	Enter Client's data	T	hh:mm AM	hh:mm AM	CHERYL	100.00	
10/07/2014	Confirm receipt of any required paperwork.	T	hh:mm AM	hh:mm AM	CHERYL	100.00	
10/13/2014	Confirm that Fee Agreement has been returned	T	hh:mm AM	hh:mm AM	CHERYL	100.00	

Note: When CompuLaw plans are printed, the **Comments** field is included rather than the **Description** field in order to display items with more than 128 character descriptions.

Graphical Calendar Report

The Graphical Calendar Report displays calendar records in various report styles. You can optionally include the Task List when printing the Graphical Calendar Report. You can change the appearance of the report (i.e., font, font size, etc.) as well as specify the user IDs and dates to be included. The Monthly Report Style on the following page includes the optional Task List.

Daily Report Style

November 7, 2014
Friday

November 2014
S M T W T F S
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30

December 2014
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31

(BLANK), CATHY, CHERYL, DAN, JASON, JEN, JPP, KENDRA, MLJ, PAM, ROBERT, RON, STCONV16, STCONV17, UNASSIGN

All Day	PAM - Has employer been notified? - Klein/Daniel P. - Klein vs. Simmons Construction
	PAM - Letter to client re: procedures & releases. - Klein/Daniel P. - Klein vs. Simmons Construction
8 am	JIM - 8:00am - Meeting with Mike Johnson
9:00	
10:00	

Weekly Report Style

November 3, 2014 - November 9, 2014

November 2014
S M T W T F S
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30

December 2014
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31

(BLANK), CATHY, CHERYL, DAN, JASON, JEN, JPP, KENDRA, MLJ, PAM, ROBERT, RON, STCONV16, STCONV17, UNASSIGN

Monday, November 3, 2014
🔔RON - 3:30pm - Office conference with John Kessler. - Gilbert/Andrew C. - Auto Accident - Room 4

Thursday, November 6
🔔RON - 8:00am - Outside conference with John Kessler. - Gilbert/Andrew C. - Auto Accident - 34th & Center
CLB - 11:30am - Meeting with Paul. - Peterson Insurance Co. - Maintenance of Insurance Policies - South Conference Room
DAN - 11:30am - Meeting with Paul. - Peterson Insurance Co. - Maintenance of Insurance Policies - South Conference Room
🔔JIM - 1:45pm - Office conference with Samantha Kessler. - Gilbert/Andrew C. - Auto Accident - Room 4

Tuesday, November 4
RON - 8:00am - Outside conference with Paul Franklin. - Peterson Insurance Co. - General Legal Counsel - Peterson Insurance Co. - 5th & Turner
DAN - 11:15am - Appointment with Marc Phillips. - Phillips/Marcus - Real Estate Acquisition 1 - 3434 South 45th

Friday, November 7
PAM - Has employer been notified? - Klein/Daniel P. - Klein vs. Simmons Construction
PAM - Letter to client re: procedures & releases. - Klein/Daniel P. - Klein vs. Simmons Construction

Weekly Report Style

(with the Daily Style check box selected)

November 17, 2014 - November 21, 2014

November 2014
S M T W T F S
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30

December 2014
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31

DAN, MLJ, ROBERT, RON

	Monday, Nov 17, 14	Tuesday, Nov 18	Wednesday, Nov 19	Thursday, Nov 20	Friday, Nov 21
All Day		MLJ - 11:00am - Filing Deadline - Gilbert/Andrew			ROB - Send referral payment to Mr. Williams.
8 am		RON - 8:00am - Outside conference with John Williams. - Williams/John - State v. Williams - South Conference Room			
9:00				RON - 9:15am - Meeting with Harold Berk in Conference Room.	🔔DAN - 9:00am - Deposition of Tom Smith. - Peterson Insurance Co. - Maintenance of Insurance Policies
	🔔MLJ - 9:30am - Appointment with Harry				
10:00					
	MLJ - 10:30am - Appointment with Jim Peterson - Peterson Insurance Co. - General Legal Counsel				
11:00					🔔RON - 11:15am - Outside

Monthly Report Style

November 2014

(BLANK), CATHY, CHERYL, DAN, JASON, JEN, JPP, KENDRA, MLJ, PAM, ROBERT, RON, STCONV16, STCONV17, UNASSIGN

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						Nov 1
2	3 🔔RON - 3:30pm - Office	4 RON - 8:00am - Outside conference with DAN - 11:15am - Appointment with Marc ▼	5 DAN - 10:45am - Outside conference with JAN - 1:15pm - Appointment with Paul ▼	6 🔔RON - 8:00am - Outside CLB - 11:30am - Meeting with Paul. - Peterso ▼	7 PAM - Has employer been notified? - PAM - Letter to client re: procedures & ▼	8
9	10 MLJ - 8:30am - Initial Client Meeting	11 RON - Review Escrow Documents. - 🔔JAN - 1:00pm - Office conference ▼	12 MLJ - 11:00am - Filing Deadline - Gilbert/Andrew CLB - 9:00am - Firm Meeting - Conference ▼	13 **R**MLJ - 10:15am - Meeting with RON - 8:00am - Outside conference with ▼	14 KIM - Evaluations to Court in 5 days. JIM - 11:00am - Filing Deadline - Peterson ▼	15
16	17 JAN - 9:00am - Meeting with potential client RON - 9:15am - Meeting with Harold Berk in ▼	18 ROB - Send referral payment to Mr. Williams. 🔔DAN - 9:00am - Deposition o ▼	19 RON - 12:00pm - Luncheon with Steve. - Billy's	20 RON - 9:00am - Deposition of Bryan Jones. -	21 MLJ - 8:00am - Meeting with Health USA. - CLB - 8:00am - Meeting with Health USA. - ▼	22
23	24	25 KIM - Confirm date of evaluation(s) JAN - Confirmation of Service. - ▼	26	27 Thanksgiving Day	28 JAN - 1:15pm - Appointment with Paul JAN - 3:30pm - Mediation - Peterson	29
30 RON - 8:00am - Continuing Legal Education						

Task List

X	Due_Date	Desc	GroupInfo	User_ID	Start_Time	End_Time
	11/14/2014	Filing Deadline	JASON	JASON	11:00:00 AM	hh:mm:ss AM
	11/25/2014	Confirmation of Service.	JEN	JEN	hh:mm:ss AM	hh:mm:ss AM
	11/25/2014	Verify receipt of employment records by today	JEN	JEN	hh:mm:ss AM	hh:mm:ss AM
	09/10/2015	Statute expires in 1 year.	JEN	JEN	hh:mm:ss AM	hh:mm:ss AM

Graphical Task List Report

Menu   *Reports | Graphical Task List Report*

The Graphical Task List Report displays task calendar records. You can change the appearance (i.e., font, font size, etc.) of the report as well as specify the user IDs and dates to be included. The Calendar Properties program determines the order in which the columns print and the criteria for which tasks are included.

Task List

		Task List			
X	Priority	User_ID	Complet_Dt	Due_Date	Client_ID	Desc
	5	CHERYL	mm/dd/yyyy	09/30/2014	100.00	Generate Fee Agreement
	5	CHERYL	mm/dd/yyyy	09/30/2014	100.00	Initial Meeting with Client
	5	CHERYL	mm/dd/yyyy	10/03/2014	100.00	Open File
	5	CHERYL	mm/dd/yyyy	10/06/2014	100.00	Enter Client's data
	5	CHERYL	mm/dd/yyyy	10/06/2014	100.00	Confirm receipt of any required paperwork.
	5	CHERYL	mm/dd/yyyy	10/13/2014	100.00	Confirm that Fee Agreement has been returned
	5	JEN	mm/dd/yyyy	10/17/2014	101.00	File Motion to change venue
	0	MLJ	mm/dd/yyyy	10/20/2014	102.00	Filing Deadline
	0	RON	mm/dd/yyyy	10/21/2014	200.02	Filing Deadline

Client Time Summary

Report Writer Name   *_CLNTTIM*

The Client Time Summary report is a Report Writer report included with PracticeMaster and can be modified as desired. The Client Time Summary will generate a list of all fee entries by client for a specified range of Client IDs, dates and timekeepers. The report is sorted by Client ID, date and timekeeper initials. However, the report can optionally be printed in timekeeper order and sorted by timekeeper, Client ID and date. Each timekeeper's list will begin on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014   **Client Time Summary**   Page: 1
Burns, Jensen & Powers, P.C.

Client Range: 101.00 to   101.00
Date Range: 09/01/2014   to   10/31/2014
Timekeeper Range: 1   to   999

Client ID: 101.00   Barrett/Karen
Apartment Management
Real Estate Law

Date	Tmkr	Hours	Amount	Description
09/08/2014	DHB	0.25	43.75	Telephone conference with client.
	DHB	1.00	175.00	Office conference with client regarding lease agreement.
	RJB	0.43	107.50	Meeting with Ms. Barrett
09/09/2014	DHB	2.00	350.00	Outside conference with Karen Barrett.
09/10/2014	DHB	0.50	87.50	Telephone conference with George Patterson.
	PAM	2.00	320.00	Office conference with Karen concerning the property taxes on apartments at *1715 S. 17th Street* and *2519 'A' Street.*
09/12/2014	DHB	1.00	175.00	Office conference with Ms. Barrett.
09/15/2014	DHB	0.50	87.50	Telephone conference with Ms. Barrett.
	PAM	2.00	320.00	Office conference with Karen Barrett and all of the apartment managers concerning the payment of damage deposits collected.
09/16/2014	DHB	0.50	87.50	Letter to client.
09/28/2014	DHB	1.00	175.00	Telephone conference with client.
	DHB	1.00	175.00	Review and revise lease agreement.
Client Total:		12.18	2,103.75	
Totals:		12.18	2,103.75	

Client Expense Summary

Report Writer Name   *_CLNTEXP*

The Client Expense Summary report is a Report Writer report included with PracticeMaster and can be modified as desired. This report will generate a list of all cost entries for a range of Client IDs, dates and timekeepers. The report is sorted by Client ID, date and timekeeper initials. However, the report can optionally be printed in timekeeper order and sorted by timekeeper, Client ID and date. Each timekeeper's list will begin on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014   **Client Expense Summary**   Page: 1

Client Range: 101.00 to   102.00
Date Range: 09/01/2014   to   10/31/2014
Timekeeper Range: 1   to   999

Client ID: 101.00   Williams/John
State v. Williams

Date	Tmkr	Amount	Description
09/08/2014	MLJ	7.55	Long distance telephone charges.
	MLJ	7.55	Long distance telephone charges.
	JAM	5.75	Long distance telephone charges.
	JAM	5.75	Long distance telephone charges.
09/11/2014	JAM	2.90	Postage.
	MLJ	7.50	Photocopy charges.
	JAM	10.50	Long distance telephone charges.
	JAM	2.90	Postage.
	JAM	10.50	Long distance telephone charges.
	MLJ	7.50	Photocopy charges.
09/12/2014	MLJ	6.75	Long distance telephone charges.
	MLJ	6.75	Long distance telephone charges.
09/19/2014	MLJ	2.50	Postage.
	RPA	8.50	Postage.
	MLJ	2.50	Postage.
	RPA	8.50	Postage.
10/10/2014	RPA	14.50	Courier fee Federal Express.
10/17/2014	MLJ	75.00	Adoption filing fee.
	JAM	7.35	Photocopy charges.
	RPA	30.00	Photocopy charges.
Client Total:		230.75	

Client ID: 102.00   Federated Casualty, Ltd.
Andrew C. Gilbert v. Federated Casualty

Date	Tmkr	Amount	Description
09/08/2014	MLJ	60.00	Online research.
	MLJ	60.00	Online research.
10/13/2014	MLJ	6.75	Photocopy charges.
Client Total:		126.75	
Totals:		357.50	

Journal by Type

Report Writer Name   *JRNLTYPE*

The Journal by Type Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes journal records sorted by type and by date. You can specify a range of Client IDs and dates as well as which journal record types to include on the report *[i.e., T (timer records), P (phone records), R (research records), N (note records), E (e-mail records), B (billing note records)].* Drill-down editing capabilities allow you to edit records directly from the Preview window.

```
Date: 11/17/2014                    Journal by Type                         Page: 1

Client Range:     200.01  to  200.01
Date Range:       10/01/2014   to   10/31/2014      Journal Type(s):       T,P,N,E,B
_____
                                  Timer Records
10/10/2014    Draft and revise Letters to Union Bank and Lincoln Federal regarding status of loans and
              accounts.

              User: JEN  08:30 AM  Duration: 0:52:13
              200.01  Peterson Insurance Co.
                 WC  General Legal Counsel
_____
                                  Phone Records
10/03/2014    Spoke with Mr. Anderson about setting up a meeting on October 13th at 2:00pm.

              User: MLJ  10:03 AM  Duration: 0:00:00
       Spoke With: Yes   Returned Call:      No      Left Message:     No    Voice Message:    No
              200.01  Peterson Insurance Co.
                 WC  General Legal Counsel
_____
                                Case Notes Records
10/13/2014    Peterson Insurance has requested that we submit our bills to them electronically.

              User: MLJ  09:59 AM
              200.01  Peterson Insurance Co.
                 WC  General Legal Counsel
_____
                                 E-mail Records
10/06/2014    Mr. Anderson,

              I need to postpone our meeting on October 12th. I will be out of town until 2:00 pm. Will 3:00
              pm work for you?

  Comments:   Mr. Anderson,

              I need to postpone our meeting on October 12th. I will be out of town until 2:00 pm. Will 3:00
              pm work for you?

              User: RON  02:50 PM
       To:                                CC:
       From:   Mlarson@larson.com         BCC:
              Subject:  Meeting Time
              200.01  Peterson Insurance Co.
                 WC  General Legal Counsel
       Related Party:  Gary J. Olson
```

Journal by Date

Report Writer Name   *JRNLDATE*

The Journal by Date Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes journal records sorted by date and by type. You can specify a range of Client IDs and dates as well as which journal record types to include on the report *[i.e., T (timer records), P (phone records), R (research records), N (note records), E (e-mail records), B (billing note records)].* Drill-down editing capabilities allow you to edit records directly from the Preview window.

```
Date: 11/17/2014                    Journal by Date                         Page: 1

Client Range:     200.01  to  200.01
Date Range:       10/01/2014   to   10/31/2014      Journal Type(s):       T,P,N,E,B
_____
10/03/2014    Spoke with Mr. Anderson about setting up a meeting on October 13th at 2:00pm.

              Type:  Phone   User: MLJ  10:03 AM  Duration: 0:00:00
       Spoke With: Yes   Returned Call:      No    Left Message:     No    Voice Message:    No
              200.01  Peterson Insurance Co.
                 WC  General Legal Counsel
_____
10/06/2014    Mr. Anderson,

              I need to postpone our meeting on October 12th. I will be out of town until 2:00 pm. Will 3:00 pm
              work for you?

  Comments:   Mr. Anderson,

              I need to postpone our meeting on October 12th. I will be out of town until 2:00 pm. Will 3:00 pm
              work for you?
              Type:  E-mail   User: RON  02:50 PM
              To:                                CC:
              From:   Mlarson@larson.com         BCC:
              Subject:  Meeting Time
              200.01  Peterson Insurance Co.
                 WC  General Legal Counsel
       Related Party:  Gary J. Olson
_____
10/10/2014    Draft and revise Letters to Union Bank and Lincoln Federal regarding status of loans and accounts.

              Type:  Timer   User: JEN  08:30 AM  Duration: 0:52:13
              200.01  Peterson Insurance Co.
                 WC  General Legal Counsel
_____
10/13/2014    Peterson Insurance has requested that we submit our bills to them electronically.

              Type:  Case Note   User: MLJ  09:59 AM
              200.01  Peterson Insurance Co.
                 WC  General Legal Counsel
_____
```

Daily Timer Log

Report Writer Name *DAILYTMR*

The Daily Timer Log shows a list of timer records by day. This report can be modified.

Daily Timer Log
Burns, Jensen & Powers, P.C.

Page: 1

Date Range: mm/dd/yyyy   to   10/31/2014

User	Date	First Time	Duration	Hours	Client ID	Description
MLJ	10/31/2014	11:25 AM	0:26:03	0.43	750.00	Discussed previous owner's responsibilities
Daily Total:				0.43		
	10/24/2014	12:25 PM	0:36:02	0.60		Potential client, Joseph Harrington. Re: es
Daily Total:				0.60		
	10/17/2014	10:27 AM	0:43:25	0.72	200.03	George Peterson
Daily Total:				0.72		
	10/03/2014	10:49 AM	0:59:00	0.98	200.02	Draft and prepare documents needed
	10/03/2014	11:02 AM	0:52:58	0.88	600.02	Harold re: insurance policies held
Daily Total:				1.87		
Grand Total:				3.62		

Timer Fee Report

Menu   *File | Open | Fee | Edit | Report | Timer Fee Report*

The Timer Fee Report allows you to view or print a fee record and any associated journal tasks used to create the fee record. When displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. This report cannot be modified.

Date: 11/17/2014

Timer Fee Report
Burns, Jensen & Powers, P.C.

Page: 1

Client:	500.00
Date:	09/08/2014
Description:	Preparation of Legal Documents
Timekeeper:	1, Robert J. Burns
Hours:	0.88
Amount:	220.00

Record Type	Due Date	Duration	Description
T	09/08/2014	0.88	Preparation of Legal Documents
		0.88	Hours

Client:	101.00
Date:	09/06/2014
Description:	Meeting with Ms. Barrett
Timekeeper:	1, Robert J. Burns
Hours:	0.43
Amount:	107.50

Record Type	Due Date	Duration	Description
T	09/05/2014	0.43	Meeting with Ms. Barrett
		0.43	Hours

Client:	102.00
Date:	08/25/2014
Description:	Researching real estate values
Timekeeper:	1, Robert J. Burns
Hours:	0.56
Amount:	140.00

Record Type	Due Date	Duration	Description
R	08/25/2014	0.56	Researching real estate values
		0.56	Hours

Note Report

Report Writer Name   *NOTE*

The Note Report allows you to view or print a note record. When displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the associated client record.

Date: 11/17/2014   **Note Report**   Page: 1
Jensen, Martin & Anderson, P.C.

    120.01   Klein/Daniel P.   Klein vs. Simmons Construction

10/24/2014 09:45a KIM
Mr. Klein suffered a broken leg and a back injury when falling from faulty scaffolding while working. He was working construction at the time for Simmons Construction Company. Mr. Klein missed four months of work. Preliminary information indicates approximate settlement of $150,000.00 for medical expenses and loss of wages.

Client Document Management Report

Report Writer Name   *_DOCMGMT*

The Client Document Management Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of User IDs and dates. You can also specify the Document Type to be searched as well as enter alpha serial for sepcific assembled document names. The report is sorted by Client ID, date and timekeeper. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014   **Client Document Management Report**   Page: 1
Jensen, Martin & Anderson, P.C.

Client Range: to
Date Range: mm/dd/yyyy   to   11/17/2014

     Client ID: 100.00   -   Larson/Michael
               Larson v. Bel-Cor
     AOP: Workers' Compensation

Date		Document	Created By	Resp. User
09/16/2014	Tue	Assembled\Larson_Michael\100\00\20140916-Referral Letter.doc	JAN	MLJ
	Description:	Referral Letter		
	Contact:	Linda M. Roberts		
	Doc Type:	Letter		
	Created On:	11/06/2013 02:15 PM Modified On: 09/16/2014 03:26 PM		
	Status:	Available		
10/17/2014	Fri	Assembled\Larson_Michael\100\00\20141017-Medical Records Re	JAN	JAN
	Description:	Medical Records Request		
	Contact:	Medical Arts Associates		
	Doc Type:	Medical Records		
	Created On:	11/06/2013 02:15 PM Modified On: 10/17/2014 03:26 PM		
	Status:	Available		
10/17/2014	Fri	Assembled\Larson_Michael\100\00\20141017-Fee Agreement.doc	JAN	MLJ
	Description:	Fee Agreement		
	Contact:	Michael Larson		
	Doc Type:	Fee Agreement		
	Created On:	11/06/2013 02:15 PM Modified On: 10/17/2014 01:51 PM		
	Status:	Available		
10/17/2014	Fri	Assembled\Larson_Michael\100\00\20141017-Employment Record	JAN	MLJ
	Description:	Employment Records Request		
	Contact:	Labour Plating Company		
	Doc Type:	Records		
	Created On:	11/06/2013 02:15 PM Modified On: 10/17/2014 03:26 PM		
	Status:	Available		
10/18/2014	Sat	Assembled\Larson_Michael\100\00\20141018-Medical Records Au	JAN	JAN
	Description:	Medical Records Authorization		
	Contact:	National Burn Care Center		

Document Check Out Report

Report Writer Name   _DOCOUT_

The Document Check Out Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of User IDs and dates. You can also search for specific document types or enter a document name to filter your search. The report is sorted by date and User ID. Drill-down editing capabilities allow you to access client records directly from the Preview window.

Date: 11/17/2014		**Document Check Out List** Jensen, Martin & Anderson, P.C.			Page: 1

User Range: to   ZZZ
Date Range: mm/dd/yyyy   to   11/17/2014

User: Paula Ann Martin

Check Out Date/Time	Client ID	Client Name	Work Description	Document Name	Document Description
11/06/2014 09:28 AM	101.00	Williams/John	State v. Williams	Assembled\Williams_John\101\00\20140817-Fee Agreement.doc	Fee Agreement
11/11/2014 11:04 AM	850.00	White/Kelly	Divorce	Assembled\White_Kelly\850\00\20141006-Fee Agreement.doc	Fee Agreement
11/12/2014 04:19 PM	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	Assembled\MegaConstruction Corporation\415\00\20141014-Fee Agreement.doc	Fee Agreement
11/17/2014 02:37 PM	100.00	Larson/Michael	Larson v. Bel-Cor	Assembled\Larson_Michael\100\00\20141017-Fee Agreement.doc	Fee Agreement
11/17/2014 02:40 PM	102.00	Gilbert/Andrew C.	Auto Accident	Assembled\Gilbert_Andrew C_\102\00\20140708-Fee Agreement.doc	Fee Agreement

Statute of Limitations Report

Report Writer Name   _STATUTE_

The Statute of Limitations Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of Client IDs, statute of limitation dates and primary timekeepers. The report can optionally be printed in primary timekeeper order. The report is sorted by statute of limitations date and then Client ID. However, if the report is run in timekeeper order, clients are first sorted by primary timekeeper. Each timekeeper's list will begin on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014	**Statute of Limitations Report** Burns, Jensen & Powers, P.C.			Page: 1

09/09/2014   09/05/2014   OPEN   MLJ   PI
    Client ID: 600.00   File No:
    Client Name: Ace Manufacturing Company
    Description: General Legal Counsel
    Contact: Al Jones
                  5th & Turner
                  Malcolm   NE   68633   402-435-1739

10/28/2014   09/08/2014   OPEN   RJB
    Client ID: 550.00   File No:
    Client Name: Federated Casualty, Ltd.
    Description: Andrew C. Gilbert v. Federated Casualty
    Contact: Samantha Kessler
                  2001 South 70th Street
                  Suite 300
                  Lincoln   NE   68510   402-421-2850

Client Summary Report
Burns, Jensen & Powers, P.C.

=========================== Client Information ===========================

Client ID:	200.01 Jefferson Insurance Co. Automobile Accident	AOP ID: PI Statute of Limitations: 06/10/2016

Alpha Search: JEFFERSON INSURA
American Charter Building
9th & West 'O' Streets
Suite 220
Lincoln NE   68510-6330

Contact Name: Mike Johnson   Location: Lincoln

Phone: 402-464-2200   Home Phone:
Fax Phone: 402-464-2202   Cellular Phone: 402-475-2205
E-mail Address: mjohnson@jefferson.com

Misc Description 1:   Insured: John G. Schell
Misc Description 2:   Policy No: 387-2398528
Misc Description 3:   Soc. Sec. No: 501-96-3487

Open Date: 06/16/2014   Close Date: mm/dd/yyyy

Primary Timekeeper: 1
Secondary Timekeeper: 4
Originating Timekeeper: 2

Category: 1   Personal Injury   Tax ID:
Inactive: Yes   Task Based Billing: No   Secure Client: No

Referred By: Farmer's Mutual Health & Life Ins

Opposing Attorney: Mark A. Nelson
County of Filing: Lancaster
State of Jurisdiction: Nebraska
County of Jurisdiction: Lancaster
Court of Jurisdiction: Lancaster District Court
Judge: Martin J. Thomas
Verdict or Outcome: Verdict
Date of Fee Agreement: 06/16/2014   Type of Fee Agreement: Contingency (25%)

Date of Birth: 10/04/1967   Gender: Male
Full Name: Jefferson Insurance Co.
First Name: Last Name: Jefferson Insurance Co.
Salutation:

========================= Area of Practice Information =========================

========================= Other Case Information =========================

Estimated Value of Case: $50,000.00   Date Last Estimated: 10/10/2014   Client DOB: 08/01/1959

Client's Drivers Lic. #:   2H1464408MLK   State of Issue: NE

Type of Injury: Head Trauma
Injury Description: Received major head trauma due to car accident encountered with a reckless
driver.

Spouse's Info, if any: Julie Johnson
1456 Main Street
Lincoln, NE 68505
Phone Number: 402-467-4587

Terms of Referral: Case Referred Out?:   No
     Case Referred In?:   Yes
Date Referred?:   06/16/2014

Referred From/To (Name):   James Swanson

Phone Number:

========================= Accident Information =========================

Client Summary Report

Report Writer Name   *CLNTSUM*

The Client Summary Report shown above and on the following three pages is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of Client IDs. The Client Summary Report is a summary of all information that has been entered for a specific client. The report can be customized for each Area of Practice. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 06/10/2014
Time: 10:25 PM

Accident Type: Automobile
Location: 24th and O
Description   Brody Johnson ran a stop light and hit the driver's side of Mike's car.

Citation/Ticket Issued?:   Yes   Number: 1251256697
                           To: Brody Johnson
                           By: Rick White
Officer's Name: Rick White   Badge #:   2145A

—————————————————— Defendant's Information ——————————————————

Name: Brody Jeffrey Johnson   DOB: 10/05/1982
Address: 12478 A Street   SSN#:   507-15-1247
                         Lincoln, NE 68514
Phone Number: 402-412-4597

Driver's License #:   H12323898
State License Issued: NE

Attorney Name: Elizabeth M. Knight
Firm Name: Gates, Lewis, Johnson & Stanton
                         122 Central
                         Suite 1740
                         Denver   CO   80202
Phone Number: 303-262-6060

Insurance Co.:   Nebraska State Insurance Co.   Contact: Linda Jennings
Address: 1220 North Liberty
                         Lincoln   NE   68509
Phone Number: 402-477-5888

Agent's Name: Gary J. Olson
Address: 245 19th Street SW
                         Lincoln   NE   68519
Phone Number: 402-423-7788

Adjuster's Name: Gary J. Olson
Address: 245 19th Street SW
                         Lincoln   NE   68519
Phone Number: 402-423-7788

Insured Name:
Policy Holder's Name:
Policy #:
Coverage Type:
Policy Limits: $0.00   Date of Claim: mm/dd/yyyy
Claim No: Date of Loss: mm/dd/yyyy

————————————————————— Plaintiff's Insurance —————————————————————

Plaintiff's Ins. Co.:   Farmer's Mutual Health & Life Ins
Contact Name: Mary Harris
Address: 4500 W. Covington Ave.
                         Lincoln   NE   68503
Phone Number: 402-474-9916

Agent's Name: David M. Roth
Address: 867 Hollyhock Ave.
                         Lincoln   NE   68508
Agent's Phone: 402-474-9876

Adjuster's Name: Gary J. Olson
Address: 245 19th Street SW

Client Summary Report
Burns, Jensen & Powers, P.C.

	Lincoln	NE	68519
Adjuster's Phone:	402-423-7788		

Insured Name:	Michael L. Johson
Policy Holder's Name:	Michael L. Johnson
Policy Number:	GUHG-36189
Type of Coverage:	
Policy Limits:	$0.00
Claim Number:	

Date of Claim:	mm/dd/yyyy
Date of Loss:	mm/dd/yyyy

--- Witness ---

Witness for?:	Defense	Rating (1=bad to 10=good):	8	Use Witness Again?:	Yes
Type of Witness:				Deposition Date:	mm/dd/yyyy
Witness Name:	Russell Harrington			Deposition Time:	hh:mm AM
Address:	1479 Y Street			Completed?:	No
	Lincoln, NE 58741				
Phone Number:	402-421-4697				

Licensed in State Name:		Years in Profession:	0
License Number:		Type:	

--- Medical Services ---

Medical Provider:	Medical Arts Associates
Address:	2390 Hathaway Blvd.
	Lincoln NE 68513
Phone Number:	402-474-7956
Patient's Name:	Mike Johnson
Doctor's Name:	Dr. Mark Wright
Date Treatment Began:	06/10/2014
Date Treatment Ended:	06/17/2014

Amount Billed:	$25,000.00
Amount Covered by Insurance:	$10,000.00

Type of Treatment:

Illness or Condition: Head Trauma

Total Billed	$25,000.00
Total Covered	$10,000.00

--- Other Attorney of Record ---

Attorney Name:	Joseph M. Lewis	Reg. Number:	
Firm Name:	Lewis, Jacobs & Brown		
Address:	1500 Park Plaza Bldg.		
	Suite B		
	Lincoln NE 68501		
Phone Number:	402-474-5861		

Relationship to Case:

--- Calendar Records ---

Date	Completed	Start Time	User ID	Description/Comments
10/26/2014	*	11:00 AM	MLJ	Filing Deadline
10/26/2014		09:30 AM	DHB	Meeting with Roger Nelson
				Phone 458-9898 at the Best Western
10/25/2014		02:00 PM	ROBERT	Meeting with Roger Nelson
				Phone 458-9898
10/24/2014		10:45 AM	MLJ	Appointment with Jim Peterson
10/24/2014	*		MLJ	Letter to Charles Rogers
10/24/2014	*	11:00 AM	JASON	Filing Deadline
10/24/2014	*	08:00 AM	DHB	Research
10/19/2014		09:15 AM	MLJ	Attend meeting with Jim Peterson
10/17/2014		10:30 AM	JPP	Consultation
10/17/2014		08:00 AM	DANIEL	Outside conference with John Kessler.
10/17/2014		11:30 AM	CHERYL	Meeting with Paul.
10/17/2014		11:30 AM	DHB	Meeting with Paul.
10/14/2014		03:30 PM	DANIEL	Outside conference with Julie Thomas.

Calendar Entries

* (asterisk)   An asterisk next to a calendar entry indicates the calendar entry is a task.

Client Summary Report
Burns, Jensen & Powers, P.C.

Date	Completed	Start Time	User ID	Description/Comments
10/12/2014		08:00 AM	JASON	Meeting with Mike Johnson.
10/12/2014		03:30 PM	ROBERT	Office conference with John Kessler.
10/12/2014		01:15 PM	ROBERT	Appointment with Paul Franklin.
10/12/2014		10:15 AM	MLJ	Meeting with Robert Maxwell.
10/12/2014		08:00 AM	DHB	Outside conference with Paul Franklin.
10/10/2014		02:30 PM	CHERYL	Meeting with Harold Berk in Conference Room.
10/10/2014		01:00 PM	JPP	Office conference with Richard Jackson.
10/03/2014	*	11:00 AM	DHB	File Motion.

──────────── Document Management ────────────

Date	Document Name	Creator	For	Description/Comments
06/17/2014	PI\200_01Agreement	ROBERT	ROBERT	Fee Agreement

──────────── Fee ────────────

Date	Inits	Hours	Amount	Description
07/05/2014	RJB	2.00	500.00	Attended deposition.
07/27/2014	DHB	1.00	175.00	Conference with client.
08/10/2014	RJB	2.00	500.00	Office conference with Mike Johnson.
08/17/2014	DHB	1.00	175.00	Telephone conference with doctor/medical personnel.
08/22/2014	DHB	1.00	175.00	Draft answers to interrogatories.
08/24/2014	RJB	1.00	250.00	Revise answers to interrogatories.
10/12/2014	MLJ	1.50	500.00	Office conference with John Kessler.
Totals:		9.50	2275.00	

──────────── Cost ────────────

Date	Inits	Amount	Description
08/05/2014	RJB	90.00	Outside professional fee
09/02/2014	RJB	6.00	Photocopy charges
09/28/2014	RJB	6.00	Facsimile costs
10/14/2014	RJB	3.00	Facsimile costs
Totals:		105.00	

──────────── Journal ────────────

Date		Time	User ID	Related Party	Description
	B				06/16/2009 02:25pm ROBERT
					Mr. Johnson has been released from the hospital. He suffered several broken ribs, cuts, bruises and severe head injuries. He had full coverage on his automobile at the time of the accident.
					The driver of the other vehicle involved in the accident was not insured at the time of the accident.
06/20/2014	T	09:58 AM	ROBERT		Prepared documents for client.
07/20/2014	T	02:38 PM	CHERYL	Martins/Nancy J.	Prepare financial documents.
09/02/2014	P	01:04 PM	ROBERT	Knight/Elizabeth M.	Phone conference with opposing council.
09/07/2014	T	11:02 AM	PAM	Lancaster District Court	Preparation of Legal Documents
09/14/2014	T	01:03 PM	JPP		Preparation of legal documents.
09/28/2014	R	04:12 PM	(BLANK)		Insurance Web site
10/03/2014	T	10:49 AM	MLJ		Draft and prepare documents needed
10/10/2014	T	01:06 PM	DHB		Prepare brief.
10/17/2014	T	10:27 AM	MLJ	Knight/Elizabeth M.	George Peterson

Journal Entries

Journal Type   The journal type is represented by a single alpha character shown between the Date and Time columns. The journal types include:

P = Phone record.
T = Timer record.
R = Research record.
E[1] = E-mail record.
N[1] = Note record.
B = Billing Notes record (from Tabs3).

[1] Not shown on sample report.

```
Date: 11/08/2014              Contact Search Report                    Page: 1
                            Jensen, Martin & Anderson, P.C.

Whole word search for: PETERSON

200.01 Peterson Insurance Co.           Client              Modified: 04/14/2014
General Legal Counsel                                       Primary:  1 MLJ
      Client Name:  Peterson Insurance Co.
      Full Name: Peterson Insurance Co.
_____
200.02 Peterson Insurance Co.           Client              Modified: 05/10/2014
Maintenance of Insurance Policies                           Primary:  3 RPA
      Client Name: Peterson Insurance Co.
      Full Name: Peterson Insurance Co.
      First Name: Peterson Insurance C
_____
Franklin/Paul                           Contact             Modified: 11/03/2014
Client Contact
      Organization: Peterson Insurance Co.
_____
Peterson Insurance Co.                  Contact             Modified: 11/03/2014
Client
      Full Name: Peterson Insurance Co.
      Organization: Peterson Insurance Co.
_____

PETERSON found in 4 records
```

Contact Search Report

Menu   *Search | Contact Search*

The Contact Search Report is generated after every contact search is performed. A Print dialog box is displayed immediately after the search is completed. When the report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill-down to the field and individual record where the contact is located. Each contact found is printed in bold with a shaded background.

```
Date: 10/19/2014            Conflict of Interest Report              Page: 1
                            Jensen, Martin & Anderson, P.C.

Whole word search for: ABLE

450.00 Able/Paul & Mary                 Client              Modified: 05/09/2014
Parent's Estate                                             Primary:  2 MLJ
      Client Name:  Able/Paul & Mary
      Alpha Search:  Able/Paul & Mary
      Contact Name: Paul Able
_____
450.00 Able/Paul & Mary                 Journal: Phone      Modified: 05/09/2014
Parent's Estate                                             Primary:  2 MLJ
      Description: Phone conference with Ms. Knight and clients Paul & Mary Able
_____
National Security Life Insurance        Contact             Modified: 09/07/2014
Insurance Company
      Comments: Because of NSLI's massive client base, they are able to offer a comprehensive selection of
_____

ABLE found in 3 records
_____

WORLDOX Conflict Search
_____
T:\worldox\clients\00000200\01\00000011.DOC WD2002 SR1 Notice
T:\worldox\clients\00000450\00\00000021.DOC Letter regarding estate
T:\worldox\clients\00000450\00\00000022.DOC Meeting Notes
T:\worldox\clients\00000450\00\00000023.DOC Misc Info

4 matches were found in WORLDOX.
```

Conflict of Interest Report

Menu   *Search | Conflict of Interest Search*

The Conflict of Interest Report is generated after every conflict of interest search is performed. A Print dialog box is displayed immediately after the search is completed. When the report is displayed using the **Preview** option, you can mouse over individual records or documents and with a click of the mouse immediately drill down to the field and individual record or document where the conflict is located.

The report shown to the left includes the Worldox documents that contain the search text.

```
Date: 10/19/2014            Conflict of Interest Report              Page: 1
                            Jensen, Martin & Anderson, P.C.

Whole word search for: ABLE

450.00 Able/Paul & Mary                 Client              Modified: 05/09/2014
Parent's Estate                                             Primary:  2 MLJ
 Contact Name: Paul Able
 Open Date:  05/06/2014
 Close Date:  mm/dd/yyyy
      Client Name:  Able/Paul & Mary
      Alpha Search:  Able/Paul & Mary
      Contact Name: Paul Able
_____
450.00 Able/Paul & Mary                 Journal: Phone      Modified: 05/09/2014
Parent's Estate                                             Primary:  2 MLJ
 Contact:  Knight/Elizabeth M.
 User ID:  MLJ
      Description: Phone conference with Ms. Knight and clients Paul & Mary Able
_____
National Security Life Insurance        Contact             Modified: 09/07/2014
Insurance Company
 Contact Category:   Insurance Company
 Organization: National Security Life Insurance
 Last Contact Date:  09/07/2014
      Comments: Because of NSLI's massive client base, they are able to offer a comprehensive selection of
_____

ABLE found in 3 records
```

Customize the Report

You can customize PracticeMaster to include additional fields on the report. Both Conflict of Interest Reports shown on this page search for the same information; however, the report shown to the left has been customized to include additional fields on the report. Customized fields that are blank will not print on the report.

The boxed areas represent the customized fields on this report.

```
Date: 11/17/2014              Conflict of Interest Report                 Page: 1
                             Jensen, Martin & Anderson, P.C.

Whole word search for: ROBERT and WHITE

850.00 White/Kelly                  Document Management         Modified: 11/12/2014
Divorce                                                         Primary:  5 KIM
   Assembled Doc Name:
      Affadavit to children.doc
   -the Marriage of: Kelly Lynn White, Petitioner, and Robert Andrew White, R
   -children are as follows: Brianne White 2322 South Mopec Drive Los Angeles
   - Angeles, CA 98084 Ashlea White 201, 22nd Avenue East Los
   -years is as follows: Brianne White Kelly White & Robert White 2322 South
   - Angeles, CA 98084 Johnathan White Kelly White & Robert White 201, 22nd A
   - Angeles, CA 98084 Ashlea White Kelly White & Robert White 201, 22nd Aven
   -BY HEARING _____ Kelly Lynn White STATE OF NEBRASKA s
   -Esq. Attorney for Kelly Lynn White November 10, 2014 Filename: Affadavit

850.00 White/Kelly                  Document Management         Modified: 11/11/2014
Divorce                                                         Primary:  5 KIM
   Assembled Doc Name:
      Motion for Custody.doc
   -the Marriage of: Kelly Lynn White, Petitioner, and Robert Andrew White, R

850.00 White/Kelly                  Additional Client Inf       Modified: 11/11/2014
Divorce                                                         Primary:  5 KIM
   Petitioner's Full Name:          Kelly Lynn White
   Respondent's Full Name:          Robert Andrew White

850.00 White/Kelly                  Spouse's Information         Modified: mm/dd/yyyy
Divorce                                                         Primary:  5 KIM
   Spouse's Full Name:              Robert White

ROBERT and WHITE found in 4 records
```

The boxed areas represent the linked documents results on the PracticeMaster Conflict of Interest Report.

The Conflict of Interest Report shown to the left includes conflicts found in linked documents. You have the ability to search linked documents and e-mail attachments.

PracticeMaster Files: Each conflict found is printed in bold with a shaded background.

Linked Documents: The linked document is shaded. The name of the field that holds the linked document is shown in italics above the linked document name. Each conflict found is shown on a separate line beginning with a dash, and including surrounding text. Conflicts found are shown in bold.

E-Mail Attachments: The e-mail attachment file name is shaded. Each conflict found is shown on a separate line beginning with a dash, and including surrounding text Conflicts found are shown in bold.

Document Search Report

Menu   *Search | Document Search*

The Document Search Report includes information found in linked documents and e-mail attachments that meet the search criteria.

```
Date: 11/17/2014              Document Search Report                      Page: 1
                             Jensen, Martin & Anderson, P.C.

Whole word search for: WHITE

850.00 White/Kelly                  Journal: E-mail             Modified: 05/13/2014
Divorce                                                         Primary:  5 KIM
   E-mail Attachments:
      FeeAgrmt.pdf
   -NE 68512 402-423-1440 Kelly Lynn White 201, 122nd Avenue East Los
   -this agreement. _____ Kelly Lynn White

850.00 White/Kelly                  Document Management         Modified: 11/11/2014
Divorce                                                         Primary:  5 KIM
   Assembled Doc Name:
      Affadavit to children.doc
   -the Marriage of: Kelly Lynn White, Petitioner, and Robert Andrew White, R
   -children are as follows: Brianne White 2322 South Mopec Drive Los Angeles
   - Angeles, CA 98084 Ashlea White 201, 22nd Avenue East Los
   -years is as follows: Brianne White Kelly White & Robert White 2322 South
   - Angeles, CA 98084 Johnathan White Kelly White & Robert White 201, 22nd A
   - Angeles, CA 98084 Ashlea White Kelly White & Robert White 201, 22nd Aven
   -BY HEARING _____ Kelly Lynn White STATE OF NEBRASKA s
   -Esq. Attorney for Kelly Lynn White November 10, 2014 Filename: Affadavit

850.00 White/Kelly                  Document Management         Modified: 11/11/2014
Divorce                                                         Primary:  5 KIM
   Assembled Doc Name:
      Motion for Custody.doc
   -the Marriage of: Kelly Lynn White, Petitioner, and Robert Andrew White, R

WHITE found in 3 records
```

The boxed area represents the e-mail attachment in which the search text was found.

Category Range: ATTORNEY to ATTORNEY

Contact Category: Attorney

Bennington & Morris

Bennington & Morris
Bennington & Morris   Contact: Murray/Alex J.
1900 South Chestnut   Work Phone: 402-649-8827
Suite D
Columbus NE 68602

First Contact Date: mm/dd/yyyy   Last Contact Date: mm/dd/yyyy

Knight/Elizabeth M.
Workers' Compensation Law

Elizabeth M. Knight
Gates, Lewis, Johnson & Stanton   Contact: Carter/Julie
122 Central   Work Phone: 303-262-6060   Fax Phone: 303-262-6061
Suite 1740
Denver CO 80202
eknight@gljslaw.com   First Contact Date: mm/dd/yyyy   Last Contact Date: mm/dd/yyyy
www.gljslaw.com

Lacey/Gary
Criminal prosecution

Gary Lacey
Lancaster County Attorney   Contact:
Fourth Floor   Work Phone:
575 South 10th Street
Lincoln NE 68508

First Contact Date: mm/dd/yyyy   Last Contact Date: mm/dd/yyyy

http://www.lancaster.ne.gov/

Detail Contact List

Report Writer Name   *RP_DET*

The Detail Contact List is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of contacts and contact categories.

Date: 11/17/2014   **Summary Contact List**   Page: 1
Burns, Jensen & Powers, P.C.

Category Range: ATT   to   INS

Attorney
        Knight/Elizabeth M.
        Lewis/Joseph M.
        Murray/Alex J.
        Nelson/Mark A.
        Roberts/Linda M.
        Wallace/Andrew C.
        Williams/Harry T.

Court
        Lancaster District Court
        Lancaster JP Court
        Nebraska Workers' Compensation Court

Court Reporter
        Brown/Stephanie J.

Summary Contact List

Report Writer Name   *RP_SUM*

The Summary Contact List is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of contacts and contact categories.

Duplicate Contacts Report

Report Writer Name   *DUPLICAT*

The Duplicate Contacts Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of contacts in order to quickly identify duplicate contacts present within the software. The report includes a list of Contact IDs and associated Full Names along with a total for the number of duplicate contacts present.

Date: 11/15/2014   **Duplicate Contacts**   Page: 1
Jensen, Martin & Anderson, P.C.

Contact ID	Name
Gilbert/Andrew C. (1)	Gilbert/Andrew C.
Klein/Daniel P. (1)	Klein/Daniel P.
Larson/Michael (1)	Larson/Michael
McBride/John (1)	McBride/John
Phillips/Marcus (1)	Phillips/Marcus
White/Kelly (1)	White/Kelly
White/Kelly (2)	White/Kelly
White/Kelly (3)	White/Kelly
Williams/John (1)	John Williams
Williams/John (2)	John Williams

Total: 10

WorkFlow List

Report Writer Name   *WORKFLOW*

The WorkFlow List is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of WorkFlows by name. WorkFlows are sorted by File Name and listed alphabetically. Each WorkFlow's Name, File, Inactive Status, Prompt Status, User Activated Status, and message content is included.

Date: 11/15/2014   **WorkFlow List**   Page: 1
Jensen, Martin & Anderson, P.C.

WorkFlows for File: CMCAL

WorkFlow Name	File	Inactive	Prompt	User Activated
Promo - Add Calendar	CMCAL	No	No	No

    Convert this calendar entry to a fee?

    Automate your next step - whether it's converting to fee, updating a client, or adding a task. Just create a PracticeMaster WorkFlow.

WorkFlow Name	File	Inactive	Prompt	User Activated
Sample - Start Document Assembly on Task Complete	CMCAL	Yes	Yes	No

    This WorkFlow starts Word Document Assembly using the CMSYSTEM\DOCS\clntltr.dot template whenever a task is marked complete.

WorkFlows for File: CMCLIENT

WorkFlow Name	File	Inactive	Prompt	User Activated
Promo - Add Client	CMCLIENT	No	No	No

    Send this client a fee agreement?

    Automate your next step - whether it's sending your fee agreement, scheduling an appointment, or adding a task. Just create a PracticeMaster WorkFlow.

WorkFlow Name	File	Inactive	Prompt	User Activated
Sample - Email ADMIN on Critical Field Changes	CMCLIENT	Yes	Yes	No

    This WorkFlow starts an E-mail to ADMIN@YourFirmName.com whenever the name, work description, or location fields change.

WorkFlow Name	File	Inactive	Prompt	User Activated
Sample - Schedule Initial Case Assessment	CMCLIENT	Yes	Yes	No

    This WorkFlow creates a calendar entry for one week after the fee agreement date is filled in.

WorkFlows for File: CMFEE

WorkFlow Name	File	Inactive	Prompt	User Activated
Sample - Notify User and Admin when Too Many Hours	CMFEE	Yes	Yes	No

    This WorkFlow creates an eNote and message whenever the hours on a fee record is more than 10 hours.

    Suggestion: This WorkFlow could be improved by changing it to send the eNote automatically to a person who is responsible for preventing overbilling.

Client File Usage Reports for Contacts

The following two Usage Reports can be used to show all contacts that are associated with a client. The Client ID is shown in the report title. When a report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. These reports cannot be modified.

Contact Usage Report

Menu   *File | Open | Client | Edit | Report | Contact Usage*

Date: 11/16/2014   **Contact Usage for Client 100.00**   Page: 1
                                         Jensen, Martin & Anderson, P.C.

Show Duplicates: Yes

Contact	File	Field Name
Bryan LGH East Hospital	Journal	Contact
Farmer's Mutual Health & Life Ins	Claimant Information	Insurance Company Name
Harris/Mary	Claimant Information	Agent's Name
Labour Plating Company	Document Management	Contact
Larson/Michael	Calendar	Contact
Larson/Michael	Client	Contact Name
Larson/Michael	Client	Client Name
Larson/Michael	Document Management	Contact
Larson/Michael	Journal	Contact
Larson/Michael	Journal	Contact
Lewis/Joseph M.	Client	Opposing Attorney
Lewis/Joseph M.	Related Contacts	Contact
Lincoln Aesthetic & Reconstructive Surgery L L C	Medical Services	Name of Medical Provider
Medical Arts Associates	Document Management	Contact
Medical Arts Associates	Medical Services	Name of Medical Provider
National Burn Care Center	Document Management	Contact
National Burn Care Center	Medical Services	Name of Medical Provider
National Security Life Insurance	Employer's Insurance	Employer's Insurance Co.
Nebraska Workers' Compensation Court	Client	Court of Jurisdiction
Olsen/Douglas A.	Client	Judge
Olson/Gary J.	Claimant Information	Adjuster's Name
Roberts/Linda M.	Client	Referred By
Roberts/Linda M.	Document Management	Contact

Total records found: 23

Contact Usage Report (No Duplicates)

Menu   *File | Open | Client | Edit | Report | Contact Usage (No Duplicates)*

Date: 11/16/2014   **Contact Usage for Client 100.00**   Page: 1
                                         Jensen, Martin & Anderson, P.C.

Show Duplicates: No

Contact	File	Field Name
Bryan LGH East Hospital	Journal	Contact
Farmer's Mutual Health & Life Ins	Claimant Information	Insurance Company Name
Harris/Mary	Claimant Information	Agent's Name
Labour Plating Company	Document Management	Contact
Larson/Michael	Calendar	Contact
Lewis/Joseph M.	Client	Opposing Attorney
Lincoln Aesthetic & Reconstructive Surgery L L C	Medical Services	Name of Medical Provider
Medical Arts Associates	Document Management	Contact
National Burn Care Center	Document Management	Contact
National Security Life Insurance	Employer's Insurance	Employer's Insurance Co.
Nebraska Workers' Compensation Court	Client	Court of Jurisdiction
Olsen/Douglas A.	Client	Judge
Olson/Gary J.	Claimant Information	Adjuster's Name
Roberts/Linda M.	Client	Referred By

Total records found: 14

Contact File Usage Reports

The following three Usage Reports can be used to show where a specific contact is used in PracticeMaster data files. When a report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. These reports cannot be modified.

Contact Usage Report

Menu   *File | Open | Contact | Edit | Report | Contact Usage*

Date: 11/16/2014		**Contact Usage Report**			Page: 1
		Jensen, Martin & Anderson, P.C.			

File(s) Searched: **All Files**
Contact ID: **Klein/Daniel P.**

File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Open Workers' Comp Case
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claim filed with W/C Court?
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Fee Agreement signed & sent to W/
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Gather/update medical records.
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Letter to client re: procedures & rele
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Has employer been notified?
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claims Adjuster appointed & contact
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Joint Statement of Evidence
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Initial Client Meeting.
Client	Client Name	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Client	Contact Name	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	10/21/2014 09:45a KIM
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Contact Atty Nelson re: culpability fo
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	scaffolding information
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Conversation with client regarding u
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Researched possible scenarios that

Total records found: 16

Calendar Contact Usage Report

Menu   *File | Open | Contact | Edit | Report | Calendar Contact Usage*

Date: 11/16/2014		**Contact Usage Report**			Page: 1
		Jensen, Martin & Anderson, P.C.			

File(s) Searched: **Calendar File**
Contact ID: **Klein/Daniel P.**

File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Open Workers' Comp Case
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claim filed with W/C Court?
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Fee Agreement signed & sent to W/
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Gather/update medical records.
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Letter to client re: procedures & rele
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Has employer been notified?
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claims Adjuster appointed & contact
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Joint Statement of Evidence
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Initial Client Meeting.

Total records found: 9

Journal Contact Usage Report

Menu   *File | Open | Contact | Edit | Report | Journal Contact Usage*

Date: 11/16/2014		**Contact Usage Report**			Page: 1
		Jensen, Martin & Anderson, P.C.			

File(s) Searched: **Journal File**
Contact ID: **Klein/Daniel P.**

File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	10/21/2014 09:45a KIM
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Contact Atty Nelson re: culpability fo
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	scaffolding information
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Conversation with client regarding u
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Researched possible scenarios that

Total records found: 5

Lookup File Usage Reports

The following Usage Reports can be used to show where specific lookup records are used in PracticeMaster data files. When a report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. These reports cannot be modified.

Timekeeper Usage Report

Menu   *File | Open | All Other Files | Lookup Files | Billing Files | Timekeeper | Edit | Report | Usage Report*

Date: 11/17/2014   **Usage Report**   Page: 1
Burns, Jensen & Powers, P.C.

Searched Value: **3**
From File: **Timekeeper**

File	AOP	Field	Client ID	Client Name	Client Desc
Client	System Files	Sec_Tkpr	100.00	Dawson/Charles L.	Settlement of Grandfather's Estate
Client	System Files	Sec_Tkpr	101.00	Barrett/Karen	Apartment Management
Client	System Files	Sec_Tkpr	200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm
Client	System Files	Sec_Tkpr	300.00	McBride/John	Management of Estate Trust
Client	System Files	Sec_Tkpr	500.00	Lyons/Mr. & Mrs. Art	Audit of Federal Income Taxes
Client	System Files	Sec_Tkpr	600.02	Ace Manufacturing Company	Maintenance of insurance policies
Client	System Files	Sec_Tkpr	700.00	First National Bank	General File
Fee	System Files	Timekeeper	101.00	Barrett/Karen	Apartment Management
Fee	System Files	Timekeeper	101.00	Barrett/Karen	Apartment Management
Fee	System Files	Timekeeper	200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance
Fee	System Files	Timekeeper	200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance
Fee	System Files	Timekeeper	200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance
Fee	System Files	Timekeeper	400.00	Lutz/Jody	Manage trust account for Jody
Fee	System Files	Timekeeper	402.00	Kiltzer/George	Set up trust for children
Fee	System Files	Timekeeper	600.02	Ace Manufacturing Company	Maintenance of insurance policies
Fee	System Files	Timekeeper	600.02	Ace Manufacturing Company	Maintenance of insurance policies
Fee	System Files	Timekeeper	600.02	Ace Manufacturing Company	Maintenance of insurance policies
Fee	System Files	Timekeeper	850.00	White/Kelly	Divorce
Fee	System Files	Timekeeper	850.00	White/Kelly	Divorce
Fee	System Files	Timekeeper	850.00	White/Kelly	Divorce

Total records found: 20

Transaction Code Usage Report

Menu   *File | Open | All Other Files | Lookup Files | Billing Files | Transaction Code | Edit | Report | Usage Report*

Date: 11/17/2014   **Usage Report**   Page: 1
Burns, Jensen & Powers, P.C.

Searched Value: **2**
From File: **Transaction Code**

File	AOP	Field	Client ID	Client Name	Client Desc
Fee	System Files	Tcode	101.00	Barrett/Karen	Apartment Management
Fee	System Files	Tcode	102.00	Richardson/Harold	Manage personal finances
Fee	System Files	Tcode	200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm
Fee	System Files	Tcode	200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm
Fee	System Files	Tcode	600.00	Ace Manufacturing Company	General Legal Counsel
Fee	System Files	Tcode	600.00	Ace Manufacturing Company	General Legal Counsel
Fee	System Files	Tcode	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Tcode	600.01	Ace Manufacturing Company	Workers' compensation claim

Total records found: 8

Task Code Usage Report

Menu   *File | Open | All Other Files | Lookup Files | Billing Files | Task Code | Edit | Report | Usage Report*

Date: 11/17/2014   **Usage Report**   Page: 1
Burns, Jensen & Powers, P.C.

Searched Value: **L110**
From File: **Task Code**

File	AOP	Field	Client ID	Client Name	Client Desc
Fee	System Files	Phase_Task	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty
Fee	System Files	Phase_Task	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty
Fee	System Files	Phase_Task	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty
Cost	System Files	Phase_Task	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty

Total records found: 4

Location Usage Report

Date: 11/17/2014   **Usage Report**   Page: 1
Burns, Jensen & Powers, P.C.

Searched Value: **Lincoln**
From File: **Location**

File	AOP	Field	Client ID	Client Name	Client Desc
Client	System Files	Location	101.00	Barrett/Karen	Apartment Management
Client	System Files	Location	200.01	Jefferson Insurance Co.	Automobile Accident
Client	System Files	Location	200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm
Client	System Files	Location	200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance
Client	System Files	Location	300.00	McBride/John	Management of Estate Trust
Client	System Files	Location	350.00	Carter/Arthur J.	Protection of New Wave Patent
Client	System Files	Location	400.00	Lutz/Jody	Manage trust account for Jody
Client	System Files	Location	402.00	Kiltzer/George	Set up trust for children
Client	System Files	Location	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty
Client	System Files	Location	700.00	First National Bank	General File
Client	System Files	Location	750.00	Harrison Investments	Purchase of Real Estate
Client	System Files	Location	850.00	White/Kelly	Divorce
Client	System Files	Location	900.00	Sherman/Natalie K.	Divorce

Total records found: 13

Calendar Code Usage Report

Date: 11/17/2014   **Usage Report**   Page: 1
Burns, Jensen & Powers, P.C.

Searched Value: **OutCW**
From File: **Calendar Code**

File	AOP	Field	Client ID	Client Name	Client Desc
Calendar	System Files	Calendar_Code		Client not found in client file	
Calendar	System Files	Calendar_Code	100.00	Dawson/Charles L.	Settlement of Grandfather's Estate
Calendar	System Files	Calendar_Code	100.00	Dawson/Charles L.	Settlement of Grandfather's Estate
Calendar	System Files	Calendar_Code	101.00	Barrett/Karen	Apartment Management
Calendar	System Files	Calendar_Code	101.00	Barrett/Karen	Apartment Management
Calendar	System Files	Calendar_Code	101.00	Barrett/Karen	Apartment Management
Calendar	System Files	Calendar_Code	102.00	Richardson/Harold	Manage personal finances
Calendar	System Files	Calendar_Code	200.01	Jefferson Insurance Co.	Automobile Accident

Total records found: 8

Category Usage Report

Date: 11/17/2014   **Usage Report**   Page: 1
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Searched Value: **10**
From File: **Category**

File	AOP	Field	Client ID	Client Name	Client Desc
Client	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim

Total records found: 16

Primary Timekeeper 1: Paula Ann Martin
From: 08/19/2014 Thru 11/17/2014

Client	Name	AOP	Last Date	Activity	User ID
211.00	**Markis/Julie**	WC	05/06/2014	Timer	CLIFF
	Workman's Compensation				
150.00	**Johnsen/Kierra**	FAMILY	06/13/2014	Research	CATHY
	Family Law				
313.00	**Freeman/Chase**		07/11/2014	Fee	CLIFF
	Civil Suit				
254.00	**Ogden/Livia**	FAMILY	07/29/2014	Cost	CATHY
	Custody case				
145.00	**Tran/Sun**		07/29/2014	Phone	ADAM
	civil suit				
171.00	**Smith/John**	FAMILY	07/29/2014	Email	SUSAN
	Custody				
150.01	**Johnsen/Kierra**	FAMILY	08/05/2014	Client Note	ADAM
	Divorce				
101.00	**Williams/John**	CRIMLAW	08/18/2014	Client Opened	SUSAN
	State v. Williams				

Client Inactivity Report

Menu	*Reports	Client Inactivity Report*

The Client Inactivity Report above can be used to easily identify clients and cases with no activity in a specified time frame. This report helps you determine which cases need follow up and makes it easy to identify cases that should be marked inactive. The period of inactivity can be defined as the last number of days, weeks, months, or years. The ability to load and save report definitions, as well as designate a default report definition are available in the Client Inactivity Report. When the report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill-down to the record containing the last activity for the client.

Definitions

Client   Client ID.

Name   Client name. Listed under the Name is the Work Description of the client.

AOP   Area of Practice of the client. If the client is not assigned to an Area of Practice, no value will be shown.

Last Date   The date of last activity for the client, based on the date in the associated record.

         Calendar File   The **Date Completed** field is used. If the Date Completed is mm/dd/yyyy, the **Due Date** field will be used instead.

         Journal File   In Note, E-mail, Phone, Timer and Research records, the **Date** field is used.

         Document Management File   The **Date** field is used.

         Fee File   The **Date** field is used.

         Cost File   The **Date** field is used.

         Common Client Related Files   The Last Modified date that is stored in the record header is used. This information cannot be viewed in the software.

         Area of Practice Files   The Last Modified date that is stored in the record header is used. This information cannot be viewed in the software.

Activity   The type of record that contains the last activity for the client.

User ID   Name of the user who entered the last activity for the client.

(Pri)   Primary timekeeper assigned to the client. This column is included when a Report Order other than Primary Timekeeper is selected.

Note: When selecting items, both Work-In-Process and Archived transactions will be searched.

Activity Note: The Date Opened and Date Closed fields in the Client file are considered activity. Therefore, if the value of the client's Date Opened or Date Closed field falls within the time frame specified, the client will not be included on the report.

Multi-Record Processing Log

This report can be displayed when using the **Replace All** feature of Find and Replace. Included on the report is the User ID of the PracticeMaster user who performed the Replace All and the time at which it was run. The file for which the Replace All was run is listed, followed by whether or not the **Replace Entire Field** option was selected. The text replaced is shown with the text with which it was replaced. A count of replaced records is shown. The replaced fields are then listed along with the original text underlined, and the replacement text underlined. This log file can only be printed while the Find and Replace results are shown. Once the Find and Replace window is closed, the log file is deleted and can no longer be printed.

You can use the Load Record function while in the associated Editor window to retrieve record by specifying the record number.

Date: 11/17/2014   **Multi-Record Processing Log**   Page: 1
Jensen, Martin & Anderson, P.C.

User: DAN
Time: 10:04:35 AM
File: CMSYSTEM\CMCAL
Replacing Entire Field: No
Replacing Marc Phillips with Marcus Phillips

Replace completed, 2 of 2 replacements made.

Replaced Field: Description for Record Number: 2463
   Appointment with <u>Marc Phillips</u>.
   Appointment with <u>Marcus Phillips</u>.

Replaced Field: Description for Record Number: 2417
   Outside conference with <u>Marc Phillips</u>.
   Outside conference with <u>Marcus Phillips</u>.

System Files

This section consists of printed file definitions and screen shots of the System Files. The table shown below includes descriptions for the columns in the File Definition reports. The Table of Contents includes a list of the File Definitions.

❑ The File List at the bottom of this page is a printed report in PracticeMaster that lists the System Files. To print this report, from File Maintenance, right-click **System Files** and select **Print System Files List**.

❑ To print all file definitions for the System Files, from File Maintenance, right-click **System Files** and select **Print File Definitions for All System Files**.

Column Definitions on a File Definition Report	
Field ID	The Field ID is the field's short name.
Field Name	The Field Name is the field's long name and allows spaces and other special characters.
Type	The field type indicates how the field is treated.
Prot	Indicates whether the field is protected.
Req	Indicates whether the field is required.
Spl	Indicates whether the field should be automatically spell checked.
Hist	Indicates whether history tracking should be enabled for the field.
Cnflt	Indicates whether the contents of the field should be included in conflict of interest searches. An asterisk ("*") right of this column indicates the field will be included in contact searches. A plus sign "+" left of this column indicates the field will be printed on the conflict report and contact report.
Rep	Indicates whether the contents of the field should be copied to a new record when the Replicate function is used.
Len	Indicates the field length.
Dec	Indicates the number of decimal places for number type fields.
Min Value	Indicates the optional minimum value for number type fields.
Max Value	Indicates the optional maximum value for number type fields.

Date: 11/17/2014   **File List**   Page: 1
Jensen, Martin & Anderson, P.C.

System Files

Name	Description
CMCLIENT	Client
CMJRNL	Journal
CMCAL	Calendar
CMDOCMGT	Document Management
CMFEE	Fee
CMCOST	Cost
CMRELATE	Contact
CMCALCOD	Calendar Code
CMEMPL	Timekeeper
CMCAT	Category
CMTCODE	Transaction Code
CMTBCODE	Task Code
CMLOC	Location
CMMACRO	Text Macro
CMSECCAS	Secure Client
CMRELLNK	Contact Category
CMAUDIT	Record History
CMENOTE	eNote
CMWKFLOW	WorkFlow
CMBILLTO	Bill To
CMOLLOG	Outlook Sync Log
CMDOCTYP	Document Type
CMDOCVSN	Document Version
RELCNTCT	Related Contacts

File List - System Files

AOP Name   : CMSYSTEM
AOP Description   : System Files

File Name   : CMCLIENT
File Description   : Client
File Type   : Variable
Fixed Record Size   : 1,866
Number of indexes   : 9
Number of fields   : 84
Number of records   : 12

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Name	Client Name	Contact	Y	N	N	Y	Y *	Y	54	0		
Contact	Contact Name	Contact	Y	N	N	Y	Y *	Y	54	0		
Alpha_Search	Name Search	Alpha	Y	N	N	Y	Y	Y	16	0		
Client_Full_Name	Client Full Name	Enhanced Virtual	Y	N	N	N	N	N	50	0		
Contact_Full_Name	Contact Full Name	Enhanced Virtual	Y	N	N	N	N	N	50	0		
Addr_No	Address Number	Short	Y	N	N	Y	N	Y	2	0		
Email_Addr_No	E-mail Address Number	Short	Y	N	N	Y	N	Y	2	0		
Addr1	Address Line 1	Enhanced Virtual	Y	N	N	N	N	N	35	0		
Addr2	Address Line 2	Enhanced Virtual	Y	N	N	N	N	N	35	0		
Addr3	Address Line 3	Enhanced Virtual	Y	N	N	N	N	N	35	0		
City	City	Enhanced Virtual	Y	N	N	N	N	N	20	0		
State	State	Enhanced Virtual	Y	N	N	N	N	N	3	0		
Zip	Zip Code	Enhanced Virtual	Y	N	N	N	N	N	10	0		
Country	Country	Enhanced Virtual	Y	N	N	N	N	N	20	0		
Phone1	Phone 1	Enhanced Virtual	Y	N	N	N	Y *	N	31	0		
Phone2	Phone 2	Enhanced Virtual	Y	N	N	N	Y *	N	31	0		
Phone3	Phone 3	Enhanced Virtual	Y	N	N	N	Y *	N	31	0		
Phone4	Phone 4	Enhanced Virtual	Y	N	N	N	Y *	N	31	0		
Email_Address	E-mail Address	Enhanced Virtual	Y	N	N	N	Y *	N	100	0		
Web_Page	Web Page	Enhanced Virtual	Y	N	N	N	Y *	N	1023	0		
Phone1_Src	Phone 1 Source	Alpha	Y	N	N	N	N	Y	20	0		
Phone2_Src	Phone 2 Source	Alpha	Y	N	N	N	N	Y	20	0		
Phone3_Src	Phone 3 Source	Alpha	Y	N	N	N	N	Y	20	0		
Phone4_Src	Phone 4 Source	Alpha	Y	N	N	N	N	Y	20	0		
Phone	Phone	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Fax_Phone	Fax Phone	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Home_Phone	Home Phone	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Cellular_Phone	Mobile Phone	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Alt_Addr1	Alt Address Line 1	Alpha	Y	N	N	Y	N	Y	35	0		
Alt_Addr2	Alt Address Line 2	Alpha	Y	N	N	Y	N	Y	35	0		
Alt_Addr3	Alt Address Line 3	Alpha	Y	N	N	Y	N	Y	35	0		
Alt_City	Alt City	Alpha	Y	N	N	Y	N	Y	20	0		
Alt_State	Alt State	Alpha	Y	N	N	Y	N	Y	3	0		
Alt_Zip	Alt Zip Code	Alpha	Y	N	N	Y	N	Y	10	0		
Alt_Country	Alt Country	Alpha	Y	N	N	Y	N	Y	20	0		
Alt_Work_Phone	Alt Business Phone	Phone	Y	N	N	Y	N	Y	31	0		
Alt_Work_Fax	Alt Business Fax	Phone	Y	N	N	Y	N	Y	31	0		
Alt_Home_Phone	Alt Home Phone	Phone	Y	N	N	Y	N	Y	31	0		
Alt_Cellular_Phone	Alt Mobile Phone	Phone	Y	N	N	Y	N	Y	31	0		
Alt_Email_Address	Alt E-mail Address	E-Mail	Y	N	N	Y	N	Y	100	0		
Alt_Web_Page	Alt Web Page	Web Page	Y	N	N	Y	N	Y	1023	0		
Location	Location	LOCATION	Y	N	N	N	N	Y	8	0		
Desc	Work Description	Alpha	Y	N	N	Y	Y	N	50	0		
Task_Based_Billing	Task Based Billing	Boolean	Y	N	N	N	N	Y	1	0		
Inactive	Inactive	Boolean	Y	N	N	Y	N	N	1	0		
Secure_Client	Secure Client	Boolean	Y	N	N	N	N	Y	1	0		
Misc_1	Misc Description 1	Alpha	Y	N	N	Y	Y	N	50	0		
Misc_2	Misc Description 2	Alpha	Y	N	N	Y	Y	N	50	0		
Misc_3	Misc Description 3	Alpha	Y	N	N	Y	Y	N	50	0		
Date_Open	Date Opened	Date	Y	Y	N	Y	N	N	4	0		
Close_Date	Date Closed	Date	Y	N	N	Y	N	N	4	0		
Prim_Tkpr	Primary Tkpr	Timekeeper	Y	Y	N	N	N	Y	2	0	1	999
Sec_Tkpr	Secondary Tkpr	Timekeeper	Y	Y	N	N	N	Y	2	0	1	999
Orig_Tkpr	Originating Tkpr	Timekeeper	Y	Y	N	N	N	Y	2	0	1	999
Category	Category	Category	Y	Y	N	N	N	Y	2	0	1	999
T3_Integration	Tabs3 Integration	Boolean	Y	N	N	N	N	N	1	0		
QB_Integration	QuickBooks Integration	Boolean	Y	N	N	N	N	N	1	0		
QBEditSeq	QB Edit Sequence	Alpha	Y	N	N	N	N	N	39	0		
QBListID	QB List ID	Alpha	Y	N	N	N	N	N	39	0		
AOP	Area of Practice	AOP ID	Y	N	N	N	N	N	8	0		
Tax_ID	Tax ID	Alpha	N	N	N	Y	N	N	15	0		
Client_Photo	Client Photo	File	Y	N	N	N	N	N	260	0		
Referred_By	Referred By	Contact	N	N	N	N	N	N	54	0		
Style	Style	Alpha	N	N	N	N	Y	N	60	0		
Ref_No	File Reference Number	Alpha	N	N	N	N	N	N	15	0		
Stat_Limit	Statute of Limitations	Date	N	N	N	Y	N	N	4	0		
Opp_Atty	Opposing Attorney	Contact	N	N	N	N	N	N	54	0		
Fil_County	County of Filing	Alpha	N	N	N	N	N	N	20	0		
State_Jurs	State of Jurisdiction	Alpha	N	N	N	N	N	N	15	0		
Conty_Jurs	County of Jurisdiction	Alpha	N	N	N	N	N	N	20	0		
Court_Jurs	Court of Jurisdiction	Contact	N	N	N	N	N	N	54	0		
Judge	Judge	Contact	N	N	N	N	N	N	54	0		

CMCLIENT - Client File, Page 1

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Verdict	Verdict or Outcome	Alpha	N	N	N	N	N	N	10	0		
Agree_Date	Date of Fee Agreement	Date	N	N	N	N	N	N	4	0		
Agree_Type	Type of Fee Agreement	Alpha	N	N	N	N	N	N	60	0		
DOB	Date of Birth	Virtual	N	N	N	N	N	N	4	0		
Gender	Gender	Virtual	N	N	N	N	N	N	14	0		
Full_Name	Full Name	Virtual	N	N	N	N	N	N	50	0		
First_Name	First Name	Virtual	N	N	N	N	N	N	20	0		
Last_Name	Last Name	Virtual	N	N	N	N	N	N	30	0		
Salutation	Salutation	Virtual	N	N	N	N	N	N	20	0		
Comments	Comments	Memo	N	N	Y	Y	Y	N	45000	0		
Profile	Profile	Memo	N	N	N	N	N	N	45000	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client ID	Client ID	Y	<Client_ID>
2	Alternate Search	Alternate (Alpha) Search	Y	<Alpha_Search><Client_ID>
3	AoP ClientID	Lookup by AoP/ClientID	Y	<AOP><Client_ID>
4	Name	Name	Y	<NAME><SECURE_CLIENT><CLIENT_ID>
5	Contact	Contact	Y	<CONTACT><SECURE_CLIENT><CLIENT_ID>
6	Active	Inactive/Active	N	<Inactive><Client_ID>
7	Billing	Billing	N	<Category><Location><Task_Based_Billing>
8	Attorney	Attorney	N	<Prim_Tkpr><Sec_Tkpr><Orig_Tkpr>
9	Location	Location	N	<Location><City>

CMCLIENT - Client File, Page 2

Fig. D-1, **Address** Tab in the Client File

Fig. D-2, **Setup** Tab in the Client File

Fig. D-3, **Details** Tab in the Client File

Fig. D-4, **Court** Tab in the Client File

AOP Name   : CMSYSTEM
AOP Description   : System Files

File Name   : CMRELATE
File Description   : Contact
File Type   : Variable
Fixed Record Size   : 1,992
Number of indexes   : 3
Number of fields   : 86
Number of records   : 82

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
RP_Key	Contact ID	Contact	Y	Y	N	N	N	N	54	0		
RP_Cat	Contact Category	RPCAT	Y	N	N	Y	N	N	650	0		
Name	Full Name	Alpha	Y	N	N	Y	Y *	N	50	0		
Organization	Organization	Alpha	Y	N	N	Y	Y *	N	50	0		
Org_Sw	Organization Sw	Boolean	Y	N	N	Y	N	N	1	0		
Inactive	Inactive	Boolean	Y	N	N	Y	N	N	1	0		
County	County	Alpha	N	N	N	Y	N	N	20	0		
Addr1	Address Line 1	Enhanced Virtual	Y	N	N	N	N	N	35	0		
Addr2	Address Line 2	Enhanced Virtual	Y	N	N	N	N	N	35	0		
Addr3	Address Line 3	Enhanced Virtual	Y	N	N	N	N	N	35	0		
City	City	Enhanced Virtual	Y	N	N	N	N	N	20	0		
State	State	Enhanced Virtual	Y	N	N	N	N	N	3	0		
Zip	Zip	Enhanced Virtual	Y	N	N	N	N	N	10	0		
Country	Country	Enhanced Virtual	Y	N	N	N	N	N	20	0		
Phone1	Phone 1	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Phone2	Phone 2	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Phone3	Phone 3	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Phone4	Phone 4	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Email_Address	E-mail Address	Enhanced Virtual	Y	N	N	N	N	N	100	0		
Web_Page	Web Page	Web Page	Y	N	N	Y	Y *	N	1023	0		
Addr_No	Default Address No	Short	Y	N	N	Y	N	N	2	0		
Addr1_Line1	Bus Addr 1	Alpha	Y	N	N	Y	N	N	35	0		
Addr1_Line2	Bus Addr 2	Alpha	Y	N	N	Y	N	N	35	0		
Addr1_Line3	Bus Addr 3	Alpha	Y	N	N	Y	N	N	35	0		
Addr1_City	Bus City	Alpha	Y	N	N	Y	N	N	20	0		
Addr1_State	Bus State	Alpha	Y	N	N	Y	N	N	3	0		
Addr1_Zip	Bus Zip	Alpha	Y	N	N	Y	N	N	10	0		
Addr1_Country	Bus Country	Alpha	Y	N	N	Y	N	N	20	0		
Addr2_Line1	Home Addr 1	Alpha	Y	N	N	Y	N	N	35	0		
Addr2_Line2	Home Addr 2	Alpha	Y	N	N	Y	N	N	35	0		
Addr2_Line3	Home Addr 3	Alpha	Y	N	N	Y	N	N	35	0		
Addr2_City	Home City	Alpha	Y	N	N	Y	N	N	20	0		
Addr2_State	Home State	Alpha	Y	N	N	Y	N	N	3	0		
Addr2_Zip	Home Zip	Alpha	Y	N	N	Y	N	N	10	0		
Addr2_Country	Home Country	Alpha	Y	N	N	Y	N	N	20	0		
Addr3_Line1	Other Addr 1	Alpha	Y	N	N	Y	N	N	35	0		
Addr3_Line2	Other Addr 2	Alpha	Y	N	N	Y	N	N	35	0		
Addr3_Line3	Other Addr 3	Alpha	Y	N	N	Y	N	N	35	0		
Addr3_City	Other City	Alpha	Y	N	N	Y	N	N	20	0		
Addr3_State	Other State	Alpha	Y	N	N	Y	N	N	3	0		
Addr3_Zip	Other Zip	Alpha	Y	N	N	Y	N	N	10	0		
Addr3_Country	Other Country	Alpha	Y	N	N	Y	N	N	20	0		
Phone1_Src	Phone 1 Source	Alpha	Y	N	N	N	N	N	20	0		
Phone2_Src	Phone 2 Source	Alpha	Y	N	N	N	N	N	20	0		
Phone3_Src	Phone 3 Source	Alpha	Y	N	N	N	N	N	20	0		
Phone4_Src	Phone 4 Source	Alpha	Y	N	N	N	N	N	20	0		
Assistant_Phone	Assistant Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Work_Phone	Business Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Work_Phone2	Business Phone 2	Phone	Y	N	N	Y	Y *	N	31	0		
Work_Fax	Business Fax	Phone	Y	N	N	Y	Y *	N	31	0		
Callback	Callback	Phone	Y	N	N	Y	Y *	N	31	0		
Car_Phone	Car Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Company_Phone	Company Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Home_Phone	Home Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Home_Phone2	Home Phone 2	Phone	Y	N	N	Y	Y *	N	31	0		
Home_Fax	Home Fax	Phone	Y	N	N	Y	Y *	N	31	0		
ISDN	ISDN	Phone	Y	N	N	Y	Y *	N	31	0		
Cellular_Phone	Mobile Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Other_Phone	Other Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Other_Fax	Other Fax	Phone	Y	N	N	Y	Y *	N	31	0		
Pager	Pager	Phone	Y	N	N	Y	Y *	N	31	0		
Primary_Phone	Primary Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Radio_Phone	Radio Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Telex	Telex	Phone	Y	N	N	Y	Y *	N	31	0		
TTY_TDD_Phone	TTY/TDD Phone	Phone	Y	N	N	Y	Y *	N	31	0		
Email_Address1	E-mail Address 1	E-Mail	Y	N	N	Y	Y *	N	100	0		
Email_Address2	E-mail Address 2	E-Mail	Y	N	N	Y	Y *	N	100	0		
Email_Address3	E-mail Address 3	E-Mail	Y	N	N	Y	Y *	N	100	0		
RP_Photo	Contact Photo	File	Y	N	N	N	N	N	260	0		
Comments	Comments	Memo	Y	N	Y	Y	Y	N	45000	0		
GroupInfo	Group Info	Memo	Y	N	N	Y	N	N	1000	0		
Do_Not_Sync	Do Not Sync	Boolean	Y	N	N	Y	N	N	1	0		
T3_Integration	Tabs3 Integration	Boolean	Y	N	N	N	N	N	1	0		

CMRELATE - Contact File, Page 1

File Definition
Jensen, Martin & Anderson, P.C.

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Salutation	Salutation	Alpha	N	N	N	N	N	N	20	0		
First_Name	First Name	Alpha	N	N	N	N	Y *	N	20	0		
Last_Name	Last Name	Alpha	N	N	N	N	Y *	N	30	0		
Contact_1	Contact Name	Alpha	N	N	N	Y	Y *	N	25	0		
Contact_2	Secondary Contact Name	Alpha	N	N	N	Y	Y *	N	25	0		
First_Date	First Contact Date	Date	N	N	N	Y	N	N	4	0		
Last_Date	Last Contact Date	Date	N	N	N	Y	N	N	4	0		
Reg_No	Registration Number	Alpha	N	N	N	Y	N	N	15	0		
Specialty	Specialty	Alpha	N	N	N	Y	Y	N	50	0		
Background	General Background	Alpha	N	N	N	Y	N	N	60	0		
DOB	Date of Birth	Date	N	N	N	N	N	N	4	0		
Gender	Gender	Alpha	N	N	N	N	N	N	14	0		
IntegID	Integration ID	Memo	Y	N	N	N	N	N	45000	0		

Index	Index ID	Index Description	Protected	Sort Order
1	RelPty Key	Contact ID	Y	<RP_Key>
2	Organization	Organization	Y	<Organization>
3	Category	Category	N	<RP_Cat><RP_Key>

CMRELATE - Contact File, Page 2

Fig. D-5, **Contact** Tab in the Contact File

Fig. D-6, **Misc** Tab in the Contact File
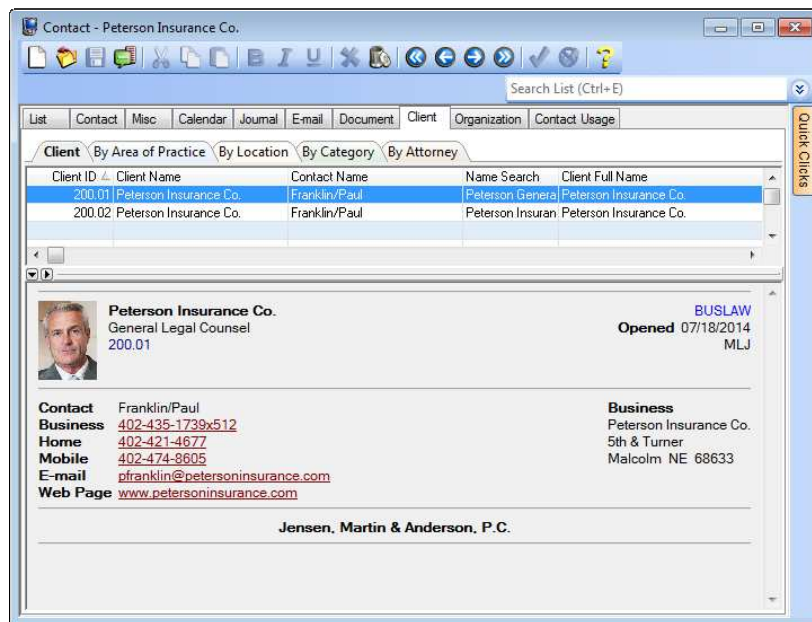
Fig. D-7, **Client** Tab in the Contact File
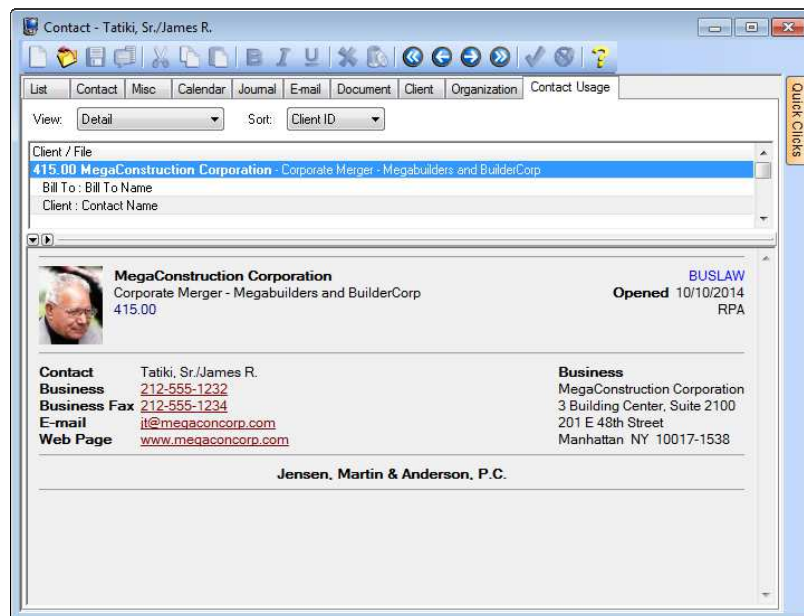
Fig. D-8, **Contact Usage** Tab in the Contact File

AOP Name : **CMSYSTEM**
AOP Description : **System Files**

File Name : CMCAL
File Description : Calendar
File Type : Variable
Fixed Record Size : 523
Number of indexes : 13
Number of fields : 37
Number of records : 133

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Due_Date	Due Date	Date	Y	N	N	Y	N	N	4	0		
Complet_Dt	Date Completed	Date	Y	N	N	Y	N	N	4	0		
Calendar_Code	Calendar Code	Calendar Code	Y	N	N	N	N	N	8	0		
Location	Location	Memo	Y	N	N	N	N	N	128	0		
Desc	Description	Alpha	Y	N	N	Y	Y	N	128	0		
Comments	Comments	Memo	Y	N	Y	Y	Y	Y	45000	0		
Type	Type	Alpha	Y	Y	N	N	N	N	1	0		
Start_Time	Time Start	Time	Y	N	N	Y	N	N	4	0		
End_Time	Time End	Time	Y	N	N	Y	N	N	4	0		
GroupInfo	User/Group	Memo	Y	N	N	N	N	N	1000	0		
Client_ID	Client ID	Client ID	Y	N	N	N	N	N	13	0		
Related_Party	Contact	Contact	Y	N	N	N	N	N	54	0		
User_ID	User ID	User	Y	N	N	Y	N	N	8	0		
Priority	Priority	Short	Y	N	N	Y	N	N	2	0	0	9
Private	Private	Boolean	Y	N	N	Y	N	N	1	0		
AlarmExpr	Alarm	Alpha	Y	N	N	Y	N	N	80	0		
Reminder1	Reminder 1	Date	Y	N	N	N	N	N	4	0		
Reminder2	Reminder 2	Date	Y	N	N	N	N	N	4	0		
Reminder3	Reminder 3	Date	Y	N	N	N	N	N	4	0		
Client_Name	Client Name	Virtual	Y	N	N	N	N	N	54	0		
Rule	Rule	Memo	Y	N	N	N	N	N	128	0		
LinkNo	Link Number	Long	Y	N	N	N	N	N	4	0		
IntegID	Integration ID	Memo	Y	N	N	N	N	N	199	0		
Pri_Key_Date_SeqNo	Pri Key Date SeqNo	Long	Y	N	N	N	N	N	4	0		
Sec_Key_Date_SeqNo	Sec Key Date SeqNo	Long	Y	N	N	N	N	N	4	0		
Root_SeqNo	Root SeqNo	Long	Y	N	N	N	N	N	4	0		
Orig_Template_SeqNo	Orig Template SeqNo	Long	Y	N	N	N	N	N	4	0		
Fee_SeqNo	Fee SeqNo	Long	Y	N	N	N	N	N	4	0		
Status	Status	Alpha	Y	N	N	N	N	N	1	0		
CLMisc	CLMisc	Memo	Y	N	N	N	N	N	128	0		
PlanVars	PlanVars	Memo	Y	N	N	N	N	N	45000	0		
CLActive	CLActive	Boolean	Y	N	N	N	N	N	1	0		
Client_Work_Desc	Client Work Desc	Virtual	N	N	N	N	N	N	50	0		
Client_Desc	Client Work Desc	Virtual	Y	N	N	N	N	N	50	0		
SnoozeDate	Snooze Date	Date	Y	N	N	N	N	N	4	0		
SnoozeTime	Snooze Time	Time	Y	N	N	N	N	N	4	0		
SnoozeVerification	Snooze Verification	Alpha	Y	N	N	N	N	N	110	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client (Due Date)	Client/Due Date/Start Time	Y	<Client_ID><Due_Date><Start_Time><Entry Order>
2	Due Date	All Records by Due Date/Start Time	Y	<Due_Date><Start_Time><Entry Order>
3	Client (Entry Order)	For Document Assembly	Y	<Client_ID><Entry Order>
4	Events Only	Events Only - User/Due Date	Y	<User_ID><Due_Date><Start_Time><Entry Order>
5	Tasks Only	Tasks Only - User/Completion Date	Y	<User_ID><Complet_Dt><Due_Date><Priority><Entry Order>
6	Root Seq No	For Internal Use	Y	<Root_SeqNo><Entry Order>
7	Key Date Seq No	For Internal Use	Y	<Pri_Key_Date_SeqNo>
8	Link Number	For Internal Use	Y	<LinkNo>
9	Reminder 1	For Internal Use	Y	<Type><User_ID><Reminder1><Start_Time>
10	Reminder 2	For Internal Use	Y	<Type><User_ID><Reminder2><Start_Time>
11	Reminder 3	For Internal Use	Y	<Type><User_ID><Reminder3><Start_Time>
12	Alarm Index	For Internal Use	Y	<User_ID><Due_Date><Start_Time><AlarmExpr>
13	CompuLaw Plans	For Internal Use	Y	<Root_SeqNo><Due_Date>

CMCAL - Calendar File

Fig. D-9, **Calendar** Tab in the Calendar File

AOP Name   : CMSYSTEM
AOP Description   : System Files

File Name   : CMJRNL
File Description   : Journal
File Type   : Variable
Fixed Record Size   : 277
Number of indexes   : 8
Number of fields   : 33
Number of records   : 28

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Record_Type	Record Type	Alpha	Y	Y	N	N	N	N	1	0		
Date	Date	Date	Y	N	N	Y	N	N	4	0		
Time	Time	Time	Y	N	N	N	N	N	4	0		
Duration	Duration	Alpha	Y	N	N	N	N	N	11	0		
Status	Status	Alpha	Y	N	N	N	N	N	1	0		
Desc	Description	Memo	Y	N	Y	Y	Y	N	45000	0		
Client_ID	Client ID	Client ID	Y	N	N	N	N	N	13	0		
Related_Party	Contact	Contact	Y	N	N	N	N	N	54	0		
User_ID	User ID	User	Y	N	N	Y	N	N	8	0		
Sent_Received	Sent/Received	Alpha	N	N	N	N	N	N	1	0		
To_From	To/From	E-Mail	N	N	N	Y	N	N	45000	0		
Subject	Subject	Alpha	Y	N	N	N	Y	N	60	0		
Spoke_With	Spoke With	Boolean	Y	N	N	N	N	N	1	0		
Returned_Call	Returned Call	Boolean	Y	N	N	N	N	N	1	0		
Left_Message	Left Message	Boolean	Y	N	N	N	N	N	1	0		
Voice_Message	Voice Message	Boolean	Y	N	N	N	N	N	1	0		
User_Updating	User Updating	User	Y	N	N	N	N	N	8	0		
First_Date	First Date	Date	Y	N	N	N	N	N	4	0		
Last_Date	Last Date	Date	Y	N	N	N	N	N	4	0		
First_Time	First Time	Time	Y	N	N	N	N	N	4	0		
Last_Time	Last Time	Time	Y	N	N	N	N	N	4	0		
Date_Time	Duration	Time Span	Y	N	N	N	N	N	10000	0		
Fee_SeqNo	Fee SeqNo	Long	Y	N	N	N	N	N	4	0		
Research_URL	Research URL	Web Page	Y	N	N	N	N	N	1023	0		
Research_File	Research File	File	Y	N	N	N	N	N	260	0		
Email_Body	E-mail Body	HTML Edit	Y	N	N	N	Y	N	0	0		
Email_Attachments	E-mail Attachments	Archive Edit	Y	N	N	N	N	N	0	0		
Email_To	To	E-Mail	Y	N	N	N	N	N	45000	0		
Email_From	From	E-Mail	Y	N	N	N	N	N	100	0		
Email_CC	CC	E-Mail	Y	N	N	N	N	N	45000	0		
Email_BCC	BCC	E-Mail	Y	N	N	N	N	N	45000	0		
Phone_No	Phone #	Phone	Y	N	N	N	Y	N	31	0		
Orig_Email	Original E-mail	Archive Edit	Y	N	N	N	N	N	0	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client_Date	Client/Date Order	Y	<Client_ID><Date><Time><Entry Order>
2	Client	Client/Entry Order	Y	<Client_ID><Entry Order>
3	Internal_1	For Internal Use	Y	<User_Updating>
4	Type/Client	Type/Client	Y	<Record_Type><Client_ID><Entry Order>
5	Internal_2	For Internal Use	Y	<Fee_SeqNo>
6	Timer Only	For Visual Timer Display	Y	<User_ID><Last_Date><Entry Order>
7	Status	Process Timer by Client/Date	Y	<Status><Client_ID><Date><Time>
8	ClientType	Client/Type/Date	N	<Client_ID><Record_Type><Date><Time><Entry Order>

CMJRNL - Journal File

Fig. D-10, **Note** Tab in the Journal File

Fig. D-11, **E-mail** Tab in the Journal File

Fig. D-12, **Time Task** Tab in the Journal File

Fig. D-13, **Phone Task** Tab in the Journal File

Fig. D-14, **Research** Tab in the Journal File

Fig. D-15, **Tabs3** Tab in the Journal File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMDOCMGT
File Description : Document Management
File Type : Variable
Fixed Record Size : 464
Number of indexes : 12
Number of fields : 38
Number of records : 24

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Date	Date	Date	Y	N	N	N	N	N	4	0		
Resp	Responsible	User	Y	N	N	N	N	N	8	0		
User_ID	Created By	User	Y	N	N	N	N	N	8	0		
To_Whom	To Whom Directed	Alpha	Y	N	N	N	Y	N	40	0		
Desc	Description	Alpha	Y	N	Y	N	Y	N	128	0		
Location	Location	Alpha	N	N	N	N	N	N	20	0		
Coded_Doc	Coded Doc Name	File	Y	N	N	N	N	N	259	0		
Assemb_Doc	Document Name	File	Y	N	N	N	N	N	259	0		
Comments	Comments	Memo	Y	N	Y	N	Y	N	45000	0		
Coded_Name_Only	Coded Doc Name Only	Alpha	N	N	N	N	N	N	31	0		
Assemb_Name_Only	Assembled Doc Name Only	Alpha	Y	N	N	N	N	N	31	0		
Related_Party	Contact	Contact	Y	N	N	N	N	N	54	0		
Doc_Type	Document Type	Document Type	Y	N	N	N	N	N	12	0		
Protect_Sw	Protect Document	Boolean	Y	N	N	N	N	N	1	0		
Manage_Sw	Manage Document Name	Boolean	Y	N	N	N	N	N	1	0		
Manage_Token	Manage Token	Long	Y	N	N	N	N	N	4	0		
Check_Out_Sw	Checkout Switch	Boolean	Y	N	N	Y	N	N	1	0		
Check_Out_User	Checkout User	User	Y	N	N	N	N	N	8	0		
Check_Out_Date	Checkout Date	Date	Y	N	N	N	N	N	4	0		
Check_Out_Time	Checkout Time	Time	Y	N	N	N	N	N	4	0		
Check_Out_Version	Checkout Version	Long	Y	N	N	Y	N	N	4	0	0	999
Check_Out	Status	Virtual	Y	N	N	N	N	N	50	0		
File_TypeInfo	File Extension	Virtual	Y	N	N	N	N	N	519	0		
File_Created	Created On	Virtual	Y	N	N	N	N	N	32	0		
File_Modified	Modified On	Virtual	Y	N	N	N	N	N	32	0		
Fee_Status	Convert to Fee Status	Alpha	Y	N	N	N	N	N	1	0		
Fee_SeqNo	Fee Record	Long	Y	N	N	N	N	N	4	0		
Jrnl_SeqNo	Journal Record	Long	Y	N	N	N	N	N	4	0		
Version_Cnt	Versions	Long	Y	N	N	N	N	N	4	0	0	999
Manage_Loc	Manage Location	Memo	Y	N	N	N	N	N	259	0		
Check_Out_Loc	Checkout Location	File	Y	N	N	N	N	N	259	0		
File_Extension	File Extension	Enhanced Virtual	Y	N	N	N	N	N	259	0		
Attachment_FileName	Journal Attachment Filename	Memo	Y	N	N	N	N	N	259	0		
File_Created_Date	Created Date	Enhanced Virtual	Y	N	N	N	N	N	4	0		
File_Created_Time	Created Time	Enhanced Virtual	Y	N	N	N	N	N	4	0		
File_Modified_Date	Modified Date	Enhanced Virtual	Y	N	N	N	N	N	4	0		
File_Modified_Time	Modified Time	Enhanced Virtual	Y	N	N	N	N	N	4	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client	Client/Entry Order	Y	<Client_ID><Entry Order>
2	Document Name Only	For Internal Use	Y	<Assemb_Name_Only>
3	User Checkouts	User Checkouts	Y	<Check_Out_Sw><Check_Out_User><Check_Out_Date><Check_Out_Time><Entry Order>
4	All Checkouts	All Checkouts	Y	<Check_Out_Sw><Check_Out_Date><Check_Out_Time><Check_Out_User><Entry Order>
5	Document Type	Document Type	Y	<Doc_Type><Entry Order>
6	File Extension	File Extension	Y	<File_Extension><Entry Order>
7	Client/Doc_Type	Client/Doc_Type	Y	<Client_ID><Doc_Type><Entry Order>
8	Client/File Extension	Client/File Extension	Y	<Client_ID><File_Extension><Entry Order>
9	JrnlSeqNo/Attachment Filename	JrnlSeqNo/Attachment Filename	Y	<Jrnl_SeqNo><Attachment_FileName><Entry Order>
10	Date Generated	Date Generated	N	<Date><Client_ID>
11	Performed By	Performed By	N	<User_ID><Date>
12	Responsible	Responsible	N	<Resp><Date>

CMDOCMGT - Document Management File

Fig. D-16, **Doc Mgmt** Tab in the Document Management File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMFEE
File Description : Fee
File Type : Variable
Fixed Record Size : 230
Number of indexes : 9
Number of fields : 23
Number of records : 586

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Timekeeper	Timekeeper Number	Timekeeper	Y	Y	N	N	N	N	2	0	1	999
Category	Category	Category	Y	Y	N	N	N	N	2	0	1	999
Date	Date	Date	Y	Y	N	Y	N	N	4	0		
Tcode	Tcode	Tcode	Y	Y	N	N	N	N	2	0	1	999
Phase_Task	Phase/Task	Task Code	Y	N	N	N	N	N	6	0		
Activity	Activity	Task Code	Y	N	N	N	N	N	6	0		
Bill_Code	Bill Code	Short	Y	N	N	N	N	N	2	0		
Hold	Status	Character	Y	N	N	N	N	N	1	0		
Rate	Rate	Number	Y	N	N	N	N	N	8	2	0.00	
Hours	Hours to Bill	Number	Y	N	N	Y	N	N	8	2	-999.99	9999.99
Amount	Amount	Money	Y	N	N	Y	N	N	8	2		
Description	Description	Memo	Y	N	Y	Y	Y	N	5000	0		
Archived	Archived Transaction	Boolean	Y	N	N	N	N	N	1	0		
Stmt_Date	Statement Date	Date	Y	N	N	N	N	N	4	0		
Stmt_Num	Statement Number	Long	Y	N	N	N	N	N	4	0		
Worked_Hours	Hours Worked	Number	Y	N	N	Y	N	N	8	2	-999.99	9999.99
Mirror_Seq_No	Mirror Seq No	Long	Y	N	N	N	N	N	4	0		
QBEditSeq	QB Edit Sequence	Alpha	Y	N	N	N	N	N	39	0		
QBTxnID	QB Trans ID	Alpha	Y	N	N	N	N	N	39	0		
User_ID	User ID	User	Y	N	N	N	N	N	8	0		
Create_Date	Creation Date	Date	Y	N	N	N	N	N	4	0		
Create_Time	Creation Time	Time	Y	N	N	N	N	N	4	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client/Seq	Client/Entry Order	Y	<Client_ID><Entry Order>
2	Arch/Mirror/SeqNo	For Internal Use	Y	<Archived><Mirror_Seq_No><Entry Order>
3	Arch/SeqNo	For Internal Use	Y	<Archived><Entry Order>
4	QBTxnID	QuickBooks TxnID	Y	<QBTxnID>
5	Tcode	For Internal Use	Y	<Tcode>
6	Activity	For Internal Use	Y	<Activity>
7	Client/Arch	For Internal Use	Y	<Client_ID><Archived>
8	Tkpr/Arch/Date/SeqNo	Timekeeper/Archived/Date/Entry Order	Y	<Timekeeper><Archived><Date><Entry Order>
9	Tkpr/Date	Timekeeper/Date	N	<Timekeeper><Date>

CMFEE - Fee File

Fig. D-17, **Fee** Tab in the Fee File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name   : **CMSYSTEM**
AOP Description   : **System Files**

File Name   : CMCOST
File Description   : Cost
File Type   : Variable
Fixed Record Size   : 294
Number of indexes : 9
Number of fields   : 23
Number of records   : 94

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Timekeeper	Timekeeper Number	Timekeeper	Y	N	N	N	N	N	2	0	1	999
Date	Date	Date	Y	Y	Y	N	N	N	4	0		
Tcode	Tcode	Tcode	Y	Y	N	N	N	N	2	0	1	999
Phase_Task	Phase/Task	Task Code	Y	N	N	N	N	N	6	0		
Activity	Expense ID	Task Code	Y	N	N	N	N	N	6	0		
Bill_Code	Bill Code	Short	Y	N	N	N	N	N	2	0		
Hold	Status	Character	Y	N	N	N	N	N	1	0		
Amount	Amount	Money	Y	N	N	Y	N	N	8	2		
Description	Description	Memo	Y	N	Y	Y	Y	N	5000	0		
Archived	Archived Transaction	Boolean	Y	N	N	N	N	N	1	0		
Stmt_Date	Statement Date	Date	Y	N	N	N	N	N	4	0		
Stmt_Num	Statement Number	Long	Y	N	N	N	N	N	4	0		
Units	Units	Number	Y	N	N	N	N	N	8	2		
Rate	Rate	Number	Y	N	N	N	N	N	8	3		
Mirror_Seq_No	Mirror Seq No	Long	Y	N	N	N	N	N	4	0		
QBEditSeq	QB Edit Sequence	Alpha	Y	N	N	N	N	N	39	0		
QBTxnID	QB Trans ID	Alpha	Y	N	N	N	N	N	39	0		
QBVendor	QuickBooks Vendor	Alpha	Y	N	N	N	N	N	41	0		
QBAcct	QuickBooks DB Acct	Alpha	Y	N	N	N	N	N	31	0		
User_ID	User ID	User	Y	N	N	N	N	N	8	0		
Create_Date	Creation Date	Date	Y	N	N	N	N	N	4	0		
Create_Time	Creation Time	Time	Y	N	N	N	N	N	4	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client/Seq	Client/Entry Order	Y	<Client_ID><Entry Order>
2	Arch/Mirror/SeqNo	For Internal Use	Y	<Archived><Mirror_Seq_No><Entry Order>
3	Arch/SeqNo	For Internal Use	Y	<Archived><Entry Order>
4	QBTxnID	QuickBooks TxnID	Y	<QBTxnID>
5	Tcode	For Internal Use	Y	<Tcode>
6	Activity	For Internal Use	Y	<Activity>
7	Client/Arch	For Internal Use	Y	<Client_ID><Archived>
8	Tkpr/Arch/Date/SeqNo	Timekeeper/Archived/Date/Entry Order	Y	<Timekeeper><Archived><Date><Entry Order>
9	Tkpr/Date	Timekeeper/Date	N	<Timekeeper><Date>

CMCOST - Cost File

Fig. D-18, **Cost** Tab in the Cost File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMCALCOD
File Description : Calendar Code
File Type : Fixed
Fixed Record Size : 291
Number of indexes : 2
Number of fields : 11
Number of records : 53

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Cal_Code	Calendar Code	Calendar Code	Y	Y	N	N	N	N	8	0		
Desc	Description	Alpha	Y	N	Y	N	N	N	128	0		
Type	Type	Alpha	Y	Y	N	N	N	N	1	0		
Txt_Color	Text Color	Long	Y	N	N	N	N	N	4	0		
Bk_Color	Background Color	Long	Y	N	N	N	N	N	4	0		
Priority	Priority	Short	Y	N	N	N	N	N	2	0	0	9
Private	Private	Boolean	Y	N	N	N	N	N	1	0		
AlarmExpr	Alarm	Alpha	Y	N	N	N	N	N	80	0		
Disable_Dnd	Disable Drag and Drop	Boolean	Y	N	N	N	N	N	1	0		
Tcode	Tcode Number	Tcode	Y	N	N	N	N	N	2	0	1	999
Amount	Amount	Money	Y	N	N	N	N	N	8	2		

Index	Index ID	Index Description	Protected	Sort Order
1	Calendar Code	Calendar Code	Y	<Cal_Code>
2	Type	Event/Task	N	<Type><Cal_Code>

CMCALCOD - Calendar Code File

Fig. D-19, **Calendar Code** Tab in the Calendar Code File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name   : **CMSYSTEM**
AOP Description   : **System Files**

File Name   : CMEMPL
File Description   : Timekeeper
File Type   : Fixed
Fixed Record Size   : 99
Number of indexes   : 3
Number of fields   : 5
Number of records   : 11

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Empl	Tkpr Number	Timekeeper	Y	Y	N	N	N	N	2	0	1	999
Name	Name	Alpha	Y	N	N	N	N	N	35	0		
Initials	Init	Alpha	Y	N	N	N	N	N	3	0		
Inactive	Inactive	Boolean	Y	N	N	N	N	N	1	0		
Rate1	Rate 1	Number	Y	N	N	N	N	N	8	2	0.00	9999.99

Index	Index ID	Index Description	Protected	Sort Order
1	Tmkpr Num	Timekeeper Number	Y	<Empl>
2	Inits/Tmkpr Num	Timekeeper Initials	Y	<Initials><Empl>
3	Name	Name	Y	<Name><Empl>

CMEMPL - Timekeeper File

Fig. D-20, **Timekeeper** Tab in the Timekeeper File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name : **CMSYSTEM**
AOP Description : **System Files**

File Name : CMCAT
File Description : Category
File Type : Fixed
Fixed Record Size : 85
Number of indexes : 2
Number of fields : 3
Number of records : 14

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Category_Number	Category Number	Category	Y	Y	N	N	N	N	2	0	1	999
Description	Desc	Alpha	Y	N	N	N	N	N	30	0		
Code_Set	Task Code Set	Alpha	Y	N	N	N	N	N	3	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Cat Num	Category Number	Y	<Category_Number>
2	Desc	Desc	Y	<Description><Category_Number>

CMCAT - Category

Fig. D-21, **Category** Tab in the Category File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name   : **CMSYSTEM**
AOP Description   : **System Files**

File Name   : CMTCODE
File Description   : Transaction Code
File Type   : Variable
Fixed Record Size   : 149
Number of indexes   : 2
Number of fields   : 12
Number of records   : 44

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Tcode	Tcode Number	Tcode	Y	Y	N	N	N	N	2	0	1	999
Alpha_Code	Alpha Code	Alpha	Y	N	N	N	N	N	3	0		
Tcode_Type	Tcode Type	Short	Y	N	N	N	N	N	2	0		
Rate	Rate	Number	Y	N	N	N	N	N	8	3		
Amount	Amount	Money	Y	N	N	N	N	N	8	2		
Exp_Adv_Fee_Type	Exp/Adv/Fee Type	Alpha	Y	N	N	N	N	N	1	0		
Bill_Code	Bill Code	Short	Y	N	N	N	N	N	2	0		
QB_INTEGRATION	Integrate with QuickBooks	Boolean	Y	N	N	N	N	N	1	0		
QB_DB_ACCT	QuickBooks Debit Acct	Alpha	Y	N	N	N	N	N	31	0		
QB_CR_ACCT	QuickBooks Credit Acct	Alpha	Y	N	N	N	N	N	31	0		
Hours	Hours	Number	Y	N	N	Y	N	N	8	2	-999.99	9999.99
Desc	Description	Memo	Y	N	N	N	N	N	5000	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Tcode Num	Tcode Number	Y	<Tcode>
2	Alpha/Tcode Num	Alpha Tcode	Y	<Alpha_Code><Tcode>

CMTCODE - Transaction Code File

Fig. D-22, **Tcode** Tab in the Transaction Code File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name : **CMSYSTEM**
AOP Description : **System Files**

File Name : CMTBCODE
File Description : Task Code
File Type : Fixed
Fixed Record Size : 128
Number of indexes : 1
Number of fields : 3
Number of records : 367

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Phase_Activity_ID	Phase Activity Id	Task Code	Y	Y	N	N	N	N	6	0		
Description	Description	Alpha	Y	N	N	N	N	N	70	0		
Tcode_Translation	Tcode	Tcode	Y	N	N	N	N	N	2	0	1	999

Index	Index ID	Index Description		Protected	Sort Order
1	Task ID	Task ID		Y	<Phase_Activity_ID>

CMTBCODE - Task Code File

Fig. D-23, **Task Code** Tab in the Task Code File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name : **CMSYSTEM**
AOP Description : **System Files**

File Name : CMLOC
File Description : Location
File Type : Fixed
Fixed Record Size : 98
Number of indexes : 1
Number of fields : 2
Number of records : 3

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Location_ID	Location ID	LOCATION	Y	Y	N	N	N	N	8	0		
Description	Description	Alpha	Y	N	N	N	N	N	40	0		

Index	Index ID	Index Description		Protected	Sort Order
1	Location ID	Location ID		Y	<Location_ID>

CMLOC - Location File

Fig. D-24, **Location** Tab in the Location File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name   : **CMSYSTEM**
AOP Description   : **System Files**

File Name   : RELCNTCT
File Description   : Related Contacts
File Type   : Variable
Fixed Record Size   : 147
Number of indexes   : 1
Number of fields   : 4
Number of records   : 2

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Contact	Contact	Contact	N	N	N	N	Y	N	54	0		
How_Related	How Related	Alpha	N	N	N	N	+ Y *	N	30	0		
Notes	Notes	Memo	N	N	N	N	Y	N	45000	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client ID	Client/Entry Order	Y	<Client_ID><Entry Order>

RELCNTCT - Related Contacts File

Fig. D-25, **Related Contacts** Tab in the Related Contacts File

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMENOTE
File Description : eNote
File Type : Variable
Fixed Record Size : 126
Number of indexes : 7
Number of fields : 21
Number of records : 2

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Len	Dec	Min Value	Max Value
Urgent	Urgent	Boolean	Y	N	N	N	N	N	1	0		
Status	Status	Long	Y	N	N	N	N	N	4	0		
Read	Read	Boolean	Y	N	N	N	N	N	1	0		
Deleted	Deleted	Boolean	Y	N	N	N	N	N	1	0		
Forwarded	Forwarded	Boolean	Y	N	N	N	N	N	1	0		
Replied	Replied	Boolean	Y	N	N	N	N	N	1	0		
Link_SeqNo	Link SeqNo	Long	Y	N	N	N	N	N	4	0		
Link_Aop	Link Aop	Alpha	Y	N	N	N	N	N	8	0		
Link_File	Link File	Alpha	Y	N	N	N	N	N	8	0		
Journal_SeqNo	Journal SeqNo	Long	Y	N	N	N	N	N	4	0		
Cal_SeqNo	Cal SeqNo	Long	Y	N	N	N	N	N	4	0		
Fee_SeqNo	Fee SeqNo	Long	Y	N	N	N	N	N	4	0		
Date	Date	Date	Y	Y	N	N	N	N	4	0		
Time	Time	Time	Y	Y	N	N	N	N	4	0		
From	From	User	Y	Y	N	N	N	N	8	0		
To_List	To	Memo	Y	Y	N	N	N	N	45000	0		
Message	Message	Memo	Y	N	N	N	N	N	45000	0		
Direction	Direction	Character	Y	Y	N	N	N	N	1	0		
Owner	Owner	User	Y	Y	N	N	N	N	8	0		
Message_ID	Message ID	Long	Y	Y	N	N	N	N	4	0	1	
Source_ID	Source ID	Long	Y	N	N	N	N	N	4	0		

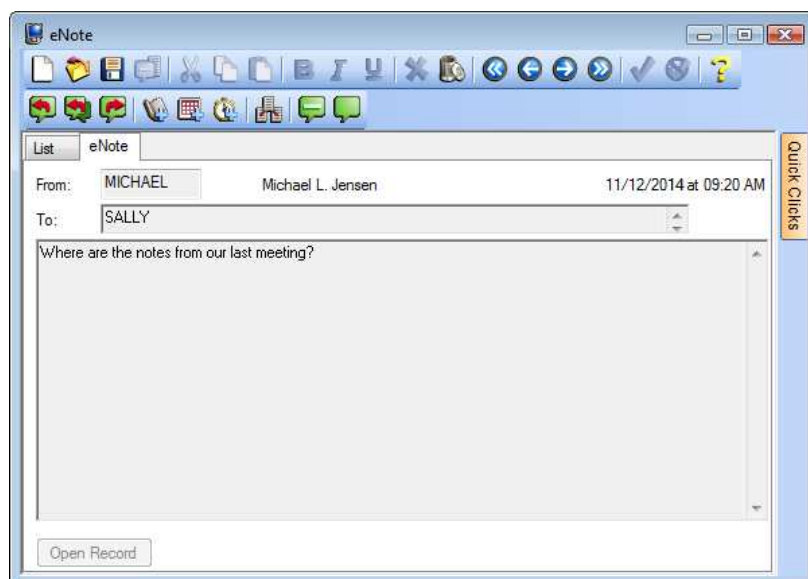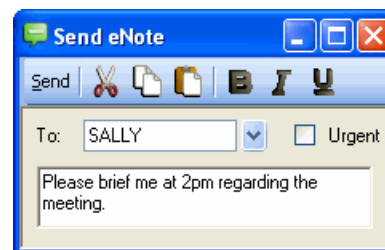| Index	Index ID	Index Description	Protected	Sort Order
1	Admin: Owner	Owner/Entry Order	Y	\<Owner\>\<Entry Order\>
2	Owner_Read_Direction	Owner / Read / Direction / ID	Y	\<Owner\>\<Read\>\<Direction\>\<Message_ID\>\<Entry Order\>
3	Message_ID	ID / Owner / Direction	Y	\<Message_ID\>\<Owner\>\<Direction\>
4	Owner/Entry Order	Owner/Deleted/Entry Order	Y	\<Owner\>\<Deleted\>\<Entry Order\>
5	Owner/Direction	Owner/Deleted/Direction	Y	\<Owner\>\<Deleted\>\<Direction\>\<Entry Order\>
6	Owner/Read	Owner/Deleted/Direction/Read	Y	\<Owner\>\<Deleted\>\<Direction\>\<Read\>\<Entry Order\>
7	Admin: Deleted	Deleted/Entry Order	Y	\<Deleted\>\<Entry Order\>

CMENOTE - eNote File

Fig. D-26, **eNote** Tab of the eNote File

Fig. D-27, Send eNote Window