

Osprey Approach: Top Client – WIP Report

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The latest version is always online at
<https://support.ospreyapproach.com/?p=33214>

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This report shows you your firm's top 10 clients. The top 10 are decided according to the amount of Work In Progress their matters have on them.

Filter Options

Fee Earner – Tick this box to select only certain fee earners, or leave unticked for all fee earners.

Work Type – Tick this box to select only certain work types, or leave unticked for all work types

Less than – Enter an amount of work in progress in here to see the top 10 clients who have less than this amount or leave blank for all clients.

More than - Enter an amount of work in progress in here to see the top 10 clients who have more than this amount or leave blank for all clients.

Private or LA – Leave set to All for all clients, or to see only Private or Legal Aid clients, select the relevant option.

Currency – Enter the date range for the bills you wish to see

Include Disbursements – Select Yes if you also want to see the disbursements figure or No if not.

Grouping Options

Fee Earner – This leaves the report sorted in order of the client with the highest amount of WIP, grouped by fee earner.

Work Type – This leaves the report sorted in order of the client with the highest amount of WIP, grouped by work type.

List of columns produced

Client Number

Matter Number

Client Name

Matter Description

Fee Earner Code

Work Type Code

Total WIP Value

Total Disbs Value (if you selected Yes to include Disbs)