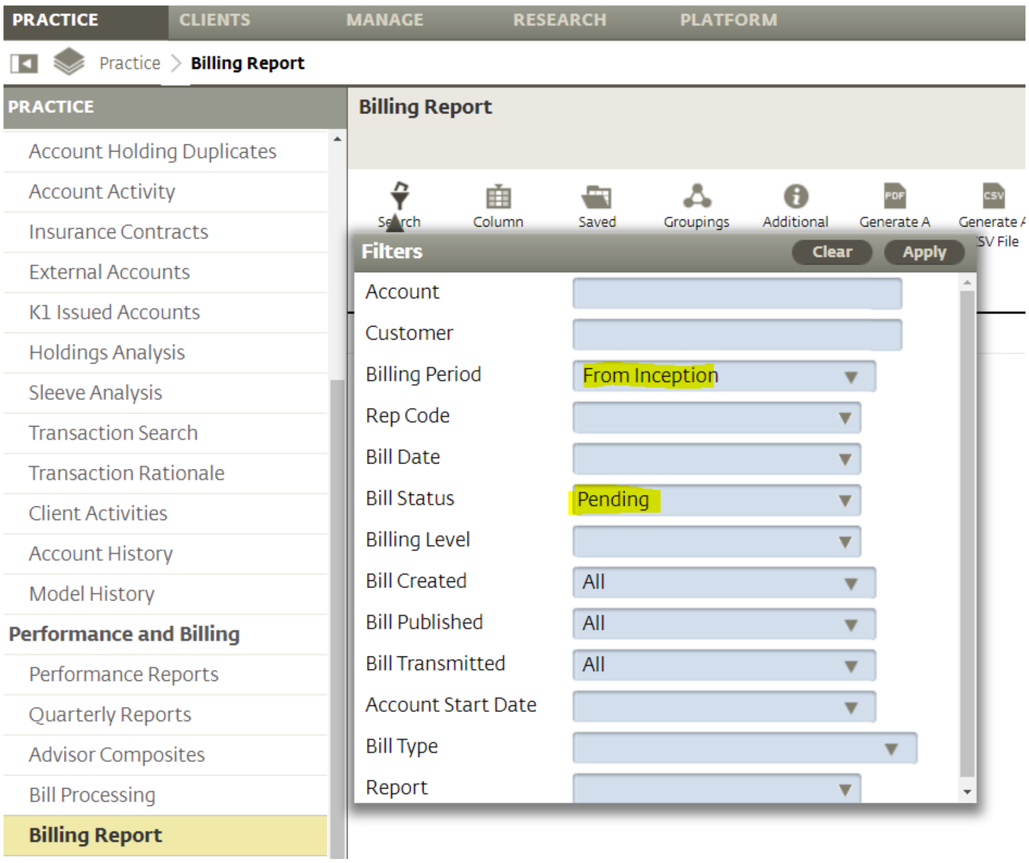
LIBERTYFI

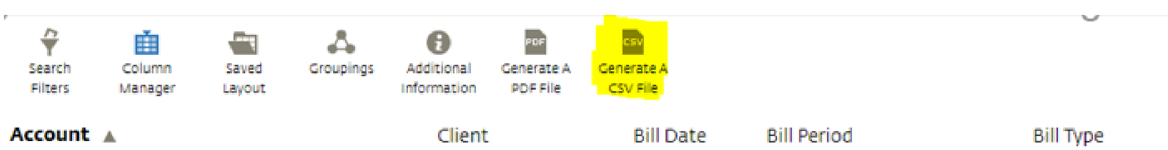
CHEAT SHEET

ADVISOR BILLING REPORTS

1. Begin by clicking **BILLING REPORT** in the **PRACTICE** sidebar menu (left hand side).



2. Update filters to match above then select **GENERATE A CSV FILE** to export to Excel.



Other features:

- **Search filters** – narrow or widen results for specific bill periods (from inception should be default billing period), clients, etc.
- **Column Manager** – add, remove or reorder columns for easiest viewing
- **Groupings** – tailor results and group accounts by household/client, etc.
- **Billing Report** – focuses on the most recent pending/prelim/published cycle