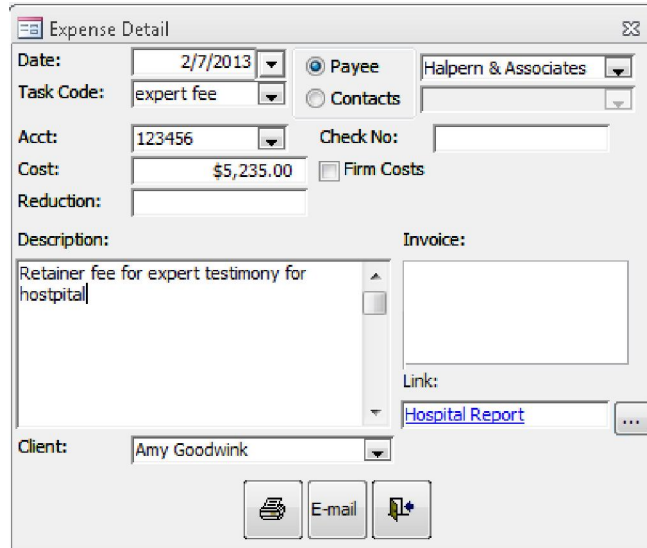# WORKING WITH THE COSTS TAB

The Costs Tab gives you quick access to the firm costs that have been incurred in your case. Costs would include filing fees, deposition fees, experts fees, fees associated in ordering medical records, postage, faxes and copy costs. Click on the Costs tab.

The Expense Detail form

- Date. The date the cost was incurred
- Payee/Contacts. Name of the person to whom the cost was payable.
- Task Code. User defined task codes to reference the type of cost.
- Acct. Any account numbers associated with the cost incurred.
- Cost. Actual amount incurred.

  TrialWorks calculates the total costs incurred and displays them in the total Cost field at the bottom of the Costs Tab. This value carries over to the Negotiations Tab.

- Reduction. The amount of the negotiated reduction in cost.
- Check No. The check number for payment of the cost incurred.
- Firm Costs. Indicate if this a firm cost (postage, faxes, copied, scans).
- Description. Detailed description of why a cost was incurred.
- Invoice/Link a link to the scanned invoice
- Client. Designation by party name of which Client the cost is associated (multi-party case)

Generating Costs Reports

- Click the Cost Report button located at the bottom of the Costs Tab.
    - Report Options are:
        - Total Cost
        - Total Cost by Task Code
        - By Payee
        - By Task Code
        - Print Marked Items Only (depending on the Print checkbox)

Additional Reports Menu
Additional Cost Reports can be found under the Financial Section of the Reports Menu

Importing Costs from Other Programs
Integration with several accounting programs is available, including QuickBooks, TABS3 and Juris.