



Cost & Revenue Tracking Modules – Record financial information about your IP

CPA Inprotech is the most complete IP and practice management solution available on the market. The Cost Tracking and Revenue Tracking Modules let you record and review information about revenue and costs associated with managing your IP. They are designed for firms that don't need the Work In Progress (WIP) and Billing functionality in CPA Inprotech, but do need to track simple cost and revenue information by case and to view the financial impact of that case for the client.

These modules let you:

- Monitor intellectual property revenue and costs
- Base management decisions on the financial status of a case
- Record historical information about revenue and costs
- Maintain data quality by integrating with other CPA Inprotech modules (e.g. you can view information about cases, agents and instructors)

Key Features

Cost Tracking Module

This module lets you input cost information against an item of intellectual property so that you can evaluate the cost of managing your IP.

Invoices received by your firm can be allocated to single or multiple cases.

Other key information that is stored when entering invoice data includes:

- A description of the work and the case(s) for which it was performed
- The currency and language associated with the invoice
- The foreign amount and agent (if applicable)
- The cost item(s) appearing on the invoice

Where there are multiple debtors against a case, a percentage value stored against the case is used to calculate the portion of costs for which each debtor is responsible. The amounts allocated are automatically calculated when the invoice details are saved.

Revenue Tracking Module

This module lets you allocate income to an item of intellectual property such as a case or family of cases. Combined with the cost information, it lets you view a comparison between revenue and costs from an IP perspective.

Key information is then stored including:

- A description of the work and the case(s) or family
- The payer and reference associated with the revenue
- The reason why the revenue was generated

Where the revenue data is entered against a family, it is then distributed evenly across all cases in the family. Revenue can then be shared if the intellectual property of the cases is shared. This distribution is automatically calculated when the revenue details are saved and is based on the revenue share percentage recorded against the case.

Enquiries

You can run an enquiry that generates a list of costs in the system according to the selected search criteria. Costs can be selected by agent, invoice date, date entered, invoice number and invoice amount range. You can select an invoice from the list and modify it if necessary. The enquiry results, known as the Invoice List, can be printed or viewed on-screen.

Reports

Several reports that provide cost tracking details are available. The Cost Details Report shows details of invoices for each case in the report. The Cost Summary To Date Report shows the total cost of managing cases up to the present date for a single case or for specific categories. The Cost Allocations Report shows the distribution of costs to debtors and can be filtered further by category or by date.

There is also a Cost Summary For Approval list that can be printed and used to determine how invoices from agents are being allocated to cases. A comparative report is available in Revenue Tracking that lets you compare the revenue and cost information for a case.

About CPA Software Solutions

CPA Software Solutions, part of the CPA Group, is a leading provider of IP management software for companies and IP attorney firms worldwide. We deliver the most advanced, innovative and configurable solutions available, designed specifically to fit your individual needs.

Together with CPA, we provide more than 40,000 businesses with IP management software solutions; patent, design and trademark renewals; domain name management; and trademark searching and watching.

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