

SETTLEMENT REPORTS

The Settlement Reports are access from the accounting menu, which may be password protected.

The Settlement Reports use data found on the settlement/distribution screen in each client file.

Select Accounting

Select Settlement Sheet

The fields indicated below, must be filled in on the settlement screen for all case types.

Gross

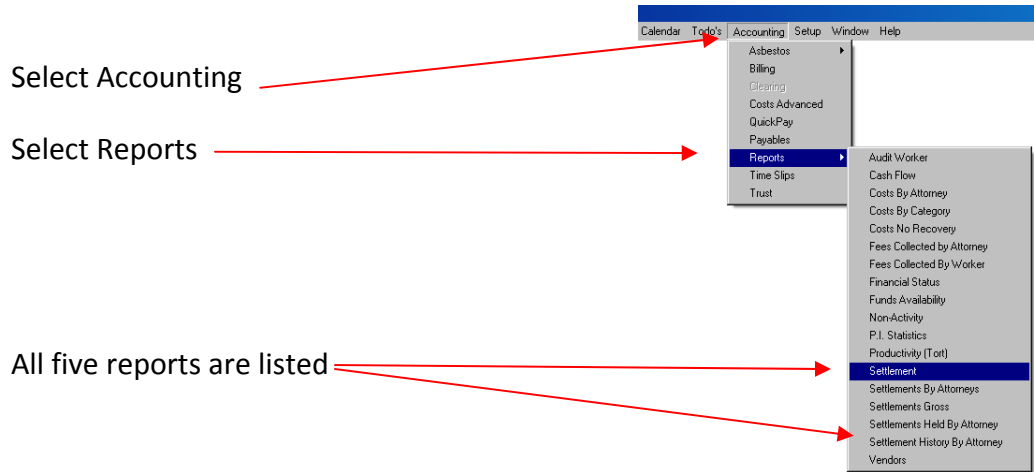
Legal Fees

Settled Date

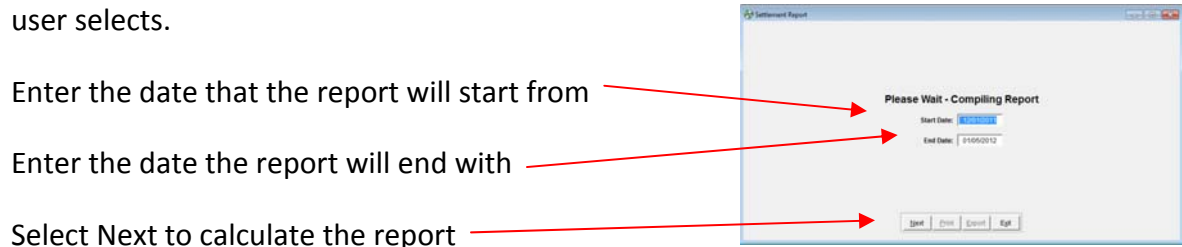
Costs *

*optional - not a required field

The Settlement Reports are accessed from the main screen.



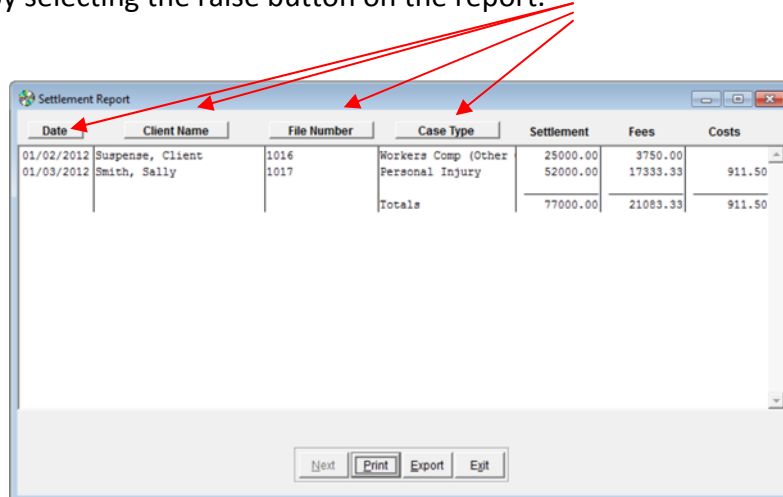
The first report is for all settlements that the firm has negotiated with any date range that the user selects.



The Settlement Report is Displayed and calculated totals for each of the money fields.

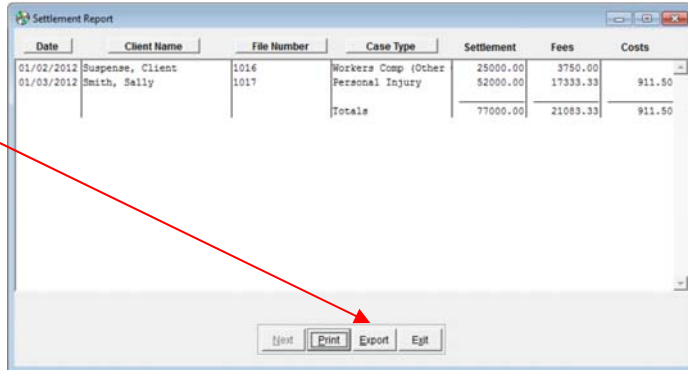
The raised buttons indicate the various ways the report can be sorted

Date, Client Name, File Number and Case Type are the various ways to sort this report. They are accessed by selecting the raise button on the report.



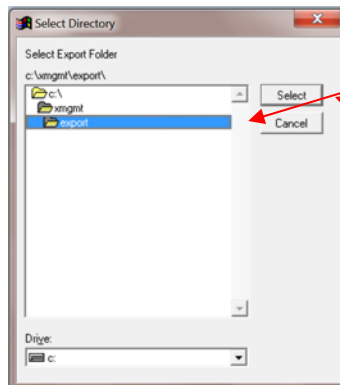
The report can now be printed or exported into an Excel Spreadsheet. The printed report will be formatted in the same manner that it is displayed.

To export the report

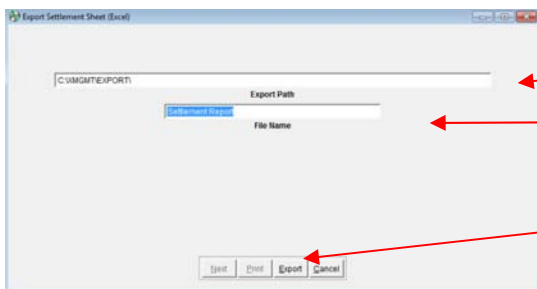


Date	Client Name	File Number	Case Type	Settlement	Fees	Costs
01/02/2012	Suspense, Client	1016	Workers Comp (Other	25000.00	3750.00	
01/03/2012	Smith, Sally	1017	Personal Injury	52000.00	17333.33	911.50
			Totals	77000.00	21083.33	911.50

The report will default to the directory listed but may be changed by browsing



Select the "Select" button after the correct directory has been selected



The selected path is now displayed along with the file name that will be created. The path and file name may be edited from this screen.

When you are satisfied with the name and path, select Export to create the Excel spreadsheet.