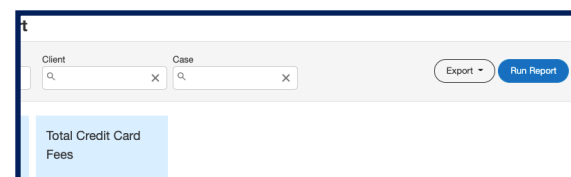
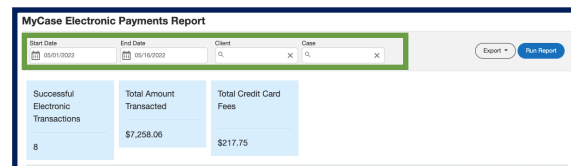
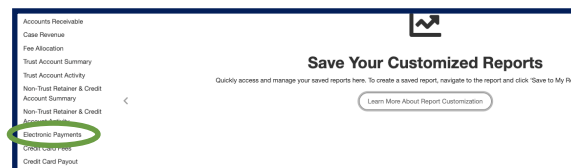
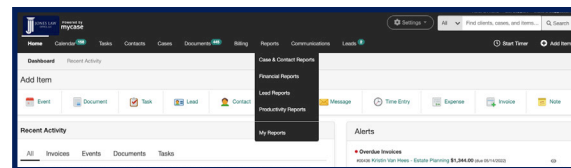


If you are getting questions from Tracy about where a payment comes from or when a payment was made pull ONLY this report. There is a whole aspect of MyCase that deals with the creation of reports & I encourage you to explore it, but to follow this to the letter when Tracy asks those questions! You can also watch this guide here: jones-lawcolorado.com/dashboard

Steps to Follow

- Navigate to the “reports” tab in the top navigation bar on the homescreen of MyCase.
- Look down the left hand side of the reports page and click on “Electronic Payments”.
- Change the dates to the range you need or narrow it down to just one client or case.
- Run the report, and then hit export and provide it to Tracy!
- That’s that! Good job!



Concluding Thoughts

The reason this report should be the only one pulled when confusion arises, is that other reports will include transactions that only occur within MyCase. When a payment is accepted into the trust account real money moves hands, however, when you make a payment from the trust into the operating account using an invoice that transaction exists only within MyCase and so if Tracy is shown a report with that transaction it often leads to confusion and stress for all involved!