



# Support Corner

## August, 2013



### An attorney needs to take a blank check to court, is there a way I can document this in Orion?

Sometimes an attorney or paralegal may need to take a blank check with them to court in order to pay a court related expense, such as a deed. Most of the time this is an undocumented process, which can lead to problems for you later. There is a way to make sure that the check number, matter information and any other information necessary to that check is entered into Orion at the time the check is given to the attorney. This makes it easier for you to remember to follow-up with them on the check amount, as the check can be held as incomplete (or not posted).

To do this, in AP Manager, click on New. Fill in the Voucher Information. For this example, we used "Clerk of Court" as the Vendor, "Fidelity Operating Account" as the Bank Code. For the Amount, since you don't know this yet, just enter any dollar amount you would like. For this example, we used "\$1.00".

Select Add Distribution and fill in the appropriate fields.



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Select Manual Check, click OK and Save.

A dialog box titled "Manual Check" with the following fields and buttons:

- Check Number: 7437
- Check Date: Tue, 08/27/2013
- Buttons: OK, Cancel
- Text at the bottom: To remove a manual check set Check Number to 0

Voucher will appear as shown below.

Accounts Payable Manager - Period 8, August 2013

Buttons: New, Edit, Delete, Reports, Action, Tools, Voucher Filter, Refresh

Vouchers -

Voucher	Invoice D...	Name	Amount /	Due Date	Entered By ID	Status
6651	8/27/2013	Clerk of Court	\$1.00	8/27/2013	DTC	Entered/Manual Check

Once you receive the necessary information from the Attorney/Paralegal who used the blank check, you can fill in and correct what is missing. Open the Voucher and select Remove Check.

Voucher Entry

Buttons: Save, Save and Post, Clear, Delete, Tools

Voucher: 6652 Entered/Manual Check **Remove Check**

Period: 8 2013

Vendor: CLERK Clerk of Court

Bank Code: 1 Fidelity-Operating Account Invoice Date: Wed, 08/28/2013

Invoice: Due Date: Wed, 08/28/2013

Amount: \$1.00 Requested by: FIRM FIRM

Description: Expand

Buttons: Add Distribution, Delete Distribution

Matter	Code	Account	Account Name	Amount	
1	016037-000001	CAFF	1200-000	Client Advances Uncollected	\$1.00

\$1.00



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Enter the corrected dollar amount.

Voucher Entry

Save Save and Post Clear Delete Tools

Voucher: 6652 Entered Manual Check

Period: 8 2013

Vendor: CLERK Clerk of Court

Bank Code: 1 Fidelity-Operating Account Invoice Date: Wed, 08/28/2013

Invoice Due Date: Wed, 08/28/2013

Amount: \$345.00 Requested by: FIRM FIRM

Description: Expand

Add Distribution Delete Distribution

Matter	Code	Account	Account Name	Amount
1	016037-000001	CAFF 1200-000	Client Advances Uncollected	\$1.00

\$1.00

Double click on the Distribution line and enter the corrected amount there.

Distribution

Date: Wed, 08/28/2013 OK

Matter: 016037-000001 BRYANT, RUTH Cancel

Retainer/Trust Balance: \$600.00 \$0.00

Code: CAFF Filing Fee

Account: 1200-000 Client Advances Uncollected

Amount: \$345.00 % Calc Units Usage Tax Include on 1099

Person: FIRM FIRM

Phase-Task: A103 Quik Mart

Description:

Select Manual Check, click OK and Save.

Manual Check

Check Number: 7437 OK

Check Date: Tue, 08/27/2013 Cancel

To remove a manual check set Check Number to 0

Further Questions? Have a Support Tip idea? Let us know, at [support@orionlaw.com](mailto:support@orionlaw.com)