Business Records for Trust Accounting by Ivon Lerdorf

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At the end of the month, do you balance your trust account bank statement in one program, jot notes onto the statement in pencil, and have to use a calculator to boot? Worse, if you are audited, can you easily recreate the math or would you have to spend hours, anxiously pouring over various bits and bobs, hoping no detailed questions are asked of you?

Easy Soft trust accounting software uses a three-way reconciliation process that prints into reports with a single click. Three-way reconciliation is a balancing of individual client deposits and expenses, along with bank account deposits and expenses. The same data set is checked three, different ways by our legal software to ensure that the individual client has the right amount of funds on deposit and that the bank account has the right aggregate amount of funds on deposit.

Even better, when you reconcile your monthly bank statement in the Easy Soft trust accounting software, you can print out the reports and place them into your monthly bookkeeping files. You can also use this trust accounting software to save the monthly reports in .pdf, Excel, or Word format to create an electronic back-up of these critical business records.

If youâ€™re thinking that it would take a long time to convert from your existing system into Easy Softâ€™s law firm escrow accounting software, think again. The download takes only a few minutes, it opens to a law firm identification screen that you complete only once, you enter your bank account information only once, you enter existing bank account balances and client escrow balances only once, et voila! You have made the conversion to the Easy Soft suite of legal software for trust accounting. In a mere ten to fifteen minutes, you could be saving valuable time each month during reconciliation, as well as each time you bill on a client file and keep track of their funds in escrow.

You wouldnâ€™t keep a clientâ€™s file spread about two offices and three filing cabinets, so why not put yourself and your practice first and foremost for that same organization and efficiency through Easy Softâ€™s law firm trust accounting software.

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A comprehensive guide for law firms to understand, evaluate and select proper a law office management software, a legal software and a law office software.

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