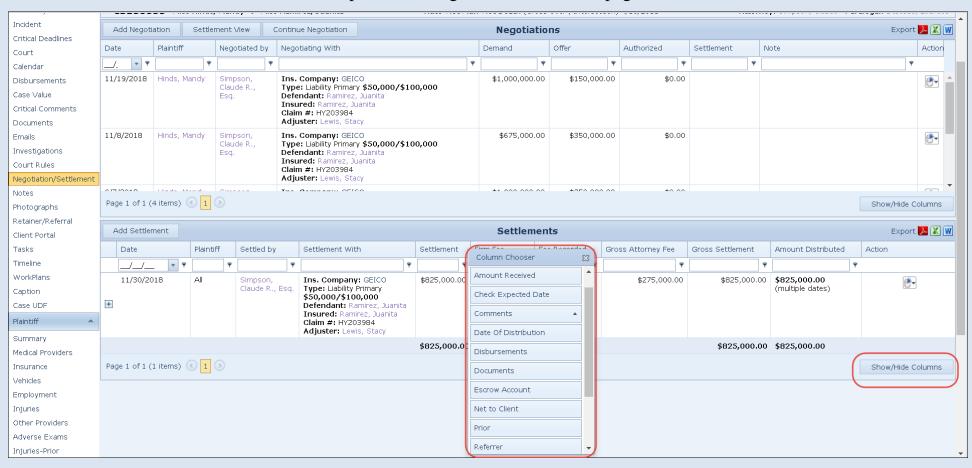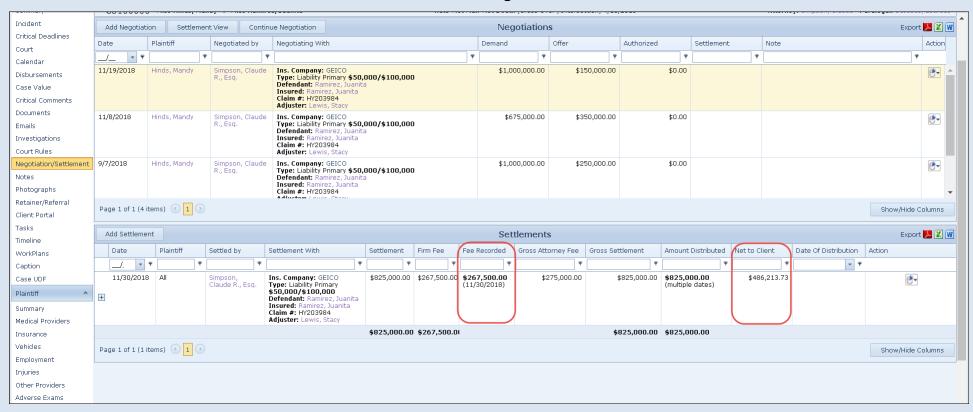Are you taking full advantage of the "Show/Hide Columns" feature in SmartAdvocate?
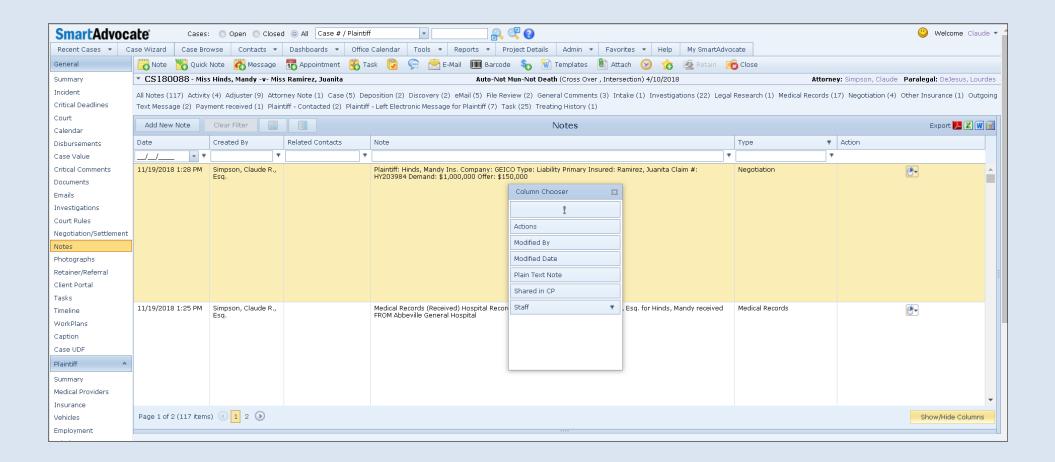
The Show/Hide Columns feature is available on most screens in a case (e.g., Documents, Notes, Liens, Disbursements -Case Expenses, Negotiation/Settlement, Medical Providers, etc.). Quite often, there are additional columns you can add to the grid to show additional information. Here is an example on the Negotiation/Settlement page:

The pop-up box (Column Chooser), superimposed over the distribution list, was accessed by clicking the 'show/hide' button in the bottom right corner of the page. Additional columns can be 'dragged' from the Column Chooser list to the column headings (or columns can be removed bydoing the reverse). The screen shot below shows the same page from the Settlement screen, but with the 'Fee Recorded' and 'Net to Client' columns added to the grid.

Here is another example shown on the Notes page. The second screen shot shows the same page with the 'Modified By' and 'Date Modified' columns added to the grid. (Note: The first screen shot below shows the 'Column Chooser' dialog box activated).

SmartAdvocate®

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General

📝 Note | 📝 Quick Note | 📧 Message | 📅 Appointment | ✅ Task | 📋 | 💬 | 📧 E-Mail | 📊 Barcode | 💲 | 📋 Templates | 📎 Attach | ⊗ | ⭐ | Retain | ❌ Close

▼ CS180088 - Miss Hinds, Mandy -v- Miss Ramirez, Juanita | **Auto-Not Mun-Not Death** (Cross Over , Intersection) 4/10/2018 | **Attorney:** Simpson, Claude **Paralegal:** DeJesus, Lourdes

General	
Summary	
Incident	

All Notes (117) Activity (4) Adjuster (9) Attorney Note (1) Case (5) Deposition (2) Discovery (2) eMail (5) File Review (2) General Comments (3) Intake (1) Investigations (22) Legal Research (1) Medical Records (17) Negotiation (4) Other Insurance (1) Outgoing Text Message (2) Payment received (1) Plaintiff - Contacted (2) Plaintiff - Left Electronic Message for Plaintiff (7) Task (25) Treating History (1)

Critical Deadlines
Court
Calendar
Disbursements
Case Value
Critical Comments
Documents
Emails
Investigations
Court Rules
Negotiation/Settlement
Notes
Photographs
Retainer/Referral
Client Portal
Tasks
Timeline
WorkPlans
Caption
Case UDF

Plaintiff ▲

Summary
Medical Providers
Insurance
Vehicles
Employment

Add New Note | Clear Filter | | | Notes | Export 📕 📗 📘 📊

Date	Created By	Related Contacts	Note	Type ▼	Action
__/__/____ ▼					
11/19/2018 1:28 PM	Simpson, Claude R., Esq.		Plaintiff: Hinds, Mandy Ins. Company: GEICO Type: Liability Primary Insured: Ramirez, Juanita Claim #: HY203984 Demand: $1,000,000 Offer: $150,000	Negotiation	🔧
11/19/2018 1:25 PM	Simpson, Claude R., Esq.		Medical Records (Received) Hospital Record ... , Esq. for Hinds, Mandy received FROM Abbeville General Hospital	Medical Records	🔧

Column Chooser ✖

| ! |
| Actions |
| Modified By |
| Modified Date |
| Plain Text Note |
| Shared in CP |
| Staff ▼ |

Page 1 of 2 (117 items) ◀ **1** 2 ▶ | Show/Hide Columns

Here is a brief video clip showing how to add and remove columns as explained above:

[Link to YouTube video]