

PCLaw® 14.1

Release Notes

Obtaining the software

PCLaw is available either via download or on CD*. A download link appears in your product key email. To obtain a CD, call Sales at 1-800-328-2898.

Note

PCLaw service packs and hot fixes are only available by download, and not available on CD. For assistance in downloading service packs or hot fixes, please visit the [Support Center](#), contact your LexisNexis Certified Independent Consultant (CIC), or call LexisNexis Technical Support at 1-800-387-9785.

Before you install

Be sure to do the following before installing PCLaw® 14.1:

- Perform a complete backup on your PCLaw data files and documents.
- Close PCLaw and all open applications on your computer.

What's new in this release

The following features and/or enhancements are new in PCLaw 14.1.

Dashboards

In the My Business Dashboard, you can now select which bank accounts to display in the Bank Balances area. If you have established user security for bank accounts, it will be reflected in the Bank Balances area as well.

In the My Clients Dashboard, you can now restrict users from seeing matter balances in the Account Details area, by checking the Hide Matter Balances check box in the Advanced Security Settings window for a user account.

Purge Entries

The Purge Entries option has been removed from the "G/L > End of Month" and "G/L > End of Year" menus. The feature remains accessible from the "Tools" menu to allow greater control over users who have access.

To satisfy jurisdictional requirements regarding the retention of accounting data, the purge data feature has been set with a default of 10 years from the last PCLaw Month-End. You can specify a shorter period of time by entering a different number of years to retain data in the Purge Entries option.

Time and Fee Entries

The Time and Fee entry sheets have both been updated to include a “Client Name” column. If you are upgrading from PCLaw 14 or lower can add this new column by right-clicking in any of the column headings, in the Time/Fee Sheet, and selecting “Restore Columns”. Alternatively, you can right-click the column headings and select Customize, to manually add the Client Name column.

Billing

The Bill and Request Bill windows now include options to include, exclude, or write off ‘Never Bill’ time entries.

Billing templates now include a new “Trust By Account” section that can display transactions, running balances and totals by account.

The “Trust” tab in the Bill and Request Bill windows now includes a new “One Account Per Page In Trust Statement” option to be used in conjunction with the new “Trust By Account” section.

Report Enhancement

You can now run a “Contingency Files Only” Work-in-Progress report.

Reports and templates have been updated to make it easier to meet trust accounting obligations in Australia and New Zealand. For more information see the [New Zealand](#) or [Australian](#) websites.

Previous Features and Enhancements

The following features and/or enhancements were added in PCLaw 14.0.

Invoice E-mail Queue

The Invoice E-mail Queue allows firms to easily e-mail client invoices. It provides filtering, sorting and previewing options for both sent and unsent invoices, and uses your current e-mail client, e.g. Outlook for the delivery of the invoices.

Upon activating the e-mail queue in PCLaw System Settings, new output options for invoices become available. These include: Always Send Bill by E-mail, Print Only, or Send by E-mail and Print. PCLaw defaults to “Always Send by E-mail” once the queue is activated, though this setting can be changed via the global change or matter bill settings.

If an existing user has access to the main billing features, they automatically have permissions to access the queue, if the queue is activated.

The “Sent” status in the queue only refers to the invoice being sent to the mail client. You have to check your mail client to confirm that the invoice was actually sent.

The Invoice E-mail Queue can be made available or removed from a user through PCLaw Security.

An Invoice E-mail Queue report is accessible through the Invoice E-mail Queue or through the Reports menu, after the queue has been activated.

My Clients Dashboard

A 'Collection Memo' area has been added, allowing you to record collection memos.

A 'New Call' button provides easy access to the New Phone Call feature.

A 'Time Sheet' button provides easy access to the Time Sheet.

Register

PCLaw now maintains its focus on edited entries in the Register.

New Report Enhancements

Never Bill items can be excluded from the Work-in-Progress Report in PCLaw 14.

Advanced PCLaw security settings have been updated so that users can now see their own time and billing in the Billing Fees Journal.

New report tokens are now available for the List of Clients report. They include:

- Billing Output Options
- Billing Output Options - Print Only
- Billing Output Options - E-mail Only
- Billing Output Options - Print & E-mail

Time Reduction Entries

If Auto Track Time Reduction is enabled on the System Settings > Data Entry tab, when hours are reduced for a record, a Time Adjustment record is created, that is equal to the quantity of hours reduced. The Time Adjustment record is identical to the original record and a task code of Time Reduction (TR) is assigned. The Time Adjustment record is also given a hold status of Never Bill and appears on your WIP reports.

We have made a change to time reduction entries so that all are tagged with the invoice number of the bill going to the client. These entries are not included in the total, and do not appear on the invoice. The time reduction entries are marked as 'billed' in PCLaw so that they do not appear on your WIP reports either. In addition, a balancing Fee Adjustment is written out for each lawyer that had a Time Reduction on the Invoice.

Contact Manager

The Contact Manager now includes the option to sort by Firm Name.

New Tokens

A 'Destroy Date' token has been added to Case Labels.

Tokens have been added to the Address section of the billing templates so you can include all client e-mail addresses, phone numbers and/or fax numbers.

Other Enhancements

PCLaw 14 is now compatible with Amicus 2014.

PCLaw 14 is now compatible with Microsoft Office Click-to-Run.

Issues addressed

Service Pack 1

The following issues have been addressed in Service Pack 1.

Billing	
4621432, 5538160	Invoices that are recreated, where the following criteria was used in the initial bill ("New Invoice" for each client and "Include if A/R balance"), will produce the same amount from the original invoice.
5201588	Recreating an invoice with multiple matters, where "Include if payments since last invoice" is not selected, now matches the original invoice.
5308505	You can now write off a multi-allocated A/P payment entry during billing, by using the "Write-off" option in the Select Charges window.
5538300	If the matter tax rate changes after taxable disbursements have been entered against the matter, PCLaw will now permit the user to change the tax amount in the Billing window.
5650714, 5654294	Billing no longer includes time reduction entries where both the original and reduced entry are set to "Never Bill".
5757691	When "Automatically Generate PDF Output" and "Save PDF Files to Document Manager" are enabled, any invoice sent to the E-mail queue now includes the PDF image.
5638087	A formula on a billing template is now capable of reading up to 5 decimal places entered from a Custom tab used in calculations.
Calendar	
5524166	Selecting the print option before selecting "Ok" no longer prevents you from closing the new Appointment or new To Do window.
Contact Manager	
5235171	Exporting all PCLaw contacts from the contact manager now produces the entire list and does not cause the application to become unresponsive.
Dashboards	
5588419	If a credit card transaction is processed while the dashboard view is enabled, PCLaw now re-opens with no problems.
5282925, 5236903	Selecting the hyperlink for the client name in the matter detail section of the My Client Dashboard displays the correct contact record in Contact Manager.
Deposit Slips	
5284940	Re-printing of Deposit Slips that include a general to trust transfer no longer produces a false message and a blank deposit slip.
Matter List	
5676166	When you filter by Category in the Matter List, the application no longer stops responding.

Matter Manager	
5248609	When you remove an additional name, under the Main tab in Matter Manager, the change is now saved as expected.
Outlook Connection	
4651198	To Do entries, sent from PCLaw to Outlook 2010, are now displayed with the correct time of 12am to 12am.
5690762	If E-mail tracking and the PCLaw Timer toolbar are enabled in a Windows 7 (32 and 64 Bit) environment, Outlook 2013 no longer terminates when right-clicking in the body of an email message.
Reports	
4736500	Contacts that have been disassociated with a client, no longer display on the List of Clients report.
5228760	When invoice numbers exceed 5 characters, the "ITC" column is no longer truncated on the Goods and Services Tax Report.
5431819	The Client Ledger report now displays the Deactivated Date for deactivated matters.
5557162	(Accrual Systems Only). On the payment listing report, if a G/L account is specified together with "Show payments to original payable G/L accounts", the report now filters correctly.
5616354	When you select 'Show Client Name as at Date Entered', the Trust Bank Journal generates as expected.
SQL	
5626770, 5624553	(SQL versions only). The Renumber Matter/Client feature now saves changes as expected.

PCLaw 14.0

The following issues were addressed in PCLaw 14.0:

Billing	
5297130	If all trust transfers are on one check during Recreate Bill, trust transfers will no longer be displayed as both previous balance and previous payments.
5309537	If the option to Prompt Before Posting Bills is utilized for Split Bills, a billing record is posted to the main matter as well as the splits.
5165487	Fixed fee amounts are no longer doubled when billed through BillFlow Manager.
Conflict Search	
5282851	A typo for the words "DisplayAs" has been addressed when searching for corporations.
Contact Manager	
5076046	Changes to the Contact Address are now being saved when the Contact Information tab is clicked for non-Admin users.

Dashboards	
5088982t	All document types are now displayed in the documents widget under My Clients.t
5385222, 5415681	In PCLaw SQL systems, where the dashboard is active and the timer is running in the time sheet, no longer experience issues in terms of freezing or crashing.
Data Entry	
5287517	Correcting a Trust Bank-to-Bank entry no longer displays a Receipt number of 00001.
5426943	The Receive Payment Add to Retainer for a Matter field now updates after amount changes.
5228025	While Trust Bank Automatic Cheque Numbering is turned off, the "To" field in Expense Recovery will no longer be blank.
4901935	Trust-to-General Transfers allocated to several G/L Accounts will no longer duplicate allocations from a previous allocation.
5295534	The time it takes to save a corrected time that contains a time entry note has been improved.
Reports	
2647555, 3030093	The number of copies for printer settings is now being saved on Windows Vista systems.
4096590, 4245527, 4452925	The number of copies for printer settings is now being saved on Windows 7 systems.
5292691, 5329244, 5282978, 5129877	When the Negative Balances Only option is selected on the Trust Listing report, the report now filters on negative balances only.
Security	
5261788, 5071424	The 'Restrict Access To' option in Advanced Security is now fully restricting access to a specific lawyer or lawyers.

Known issues

To see the most current list of known issues for the PCLaw software, visit the [PCLaw Known Issues Overview](#).

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