

Classroom Sessions - Details

PCLaw® Fundamentals

Dashboards

- My Practice (Calendar, To Do's, Recent Client Matters & Current Awareness)
- My Client (Matter Details, Events, Recent Activity & Account Details)

Conflict and Global Search

Working with Clients/Matters

Matter Manager

Docketing Time & Fees

Appointments

Client Expenses

Cheque and non-cheque expense entries

Trust accounting

- Cheques/Receipts
- Trust Transfers

Billing & Pre-Billing

- Overview
- Recommended Billing Procedures

Payment and Receipts

Please call 800-328-2898 to register for this course or for more details

PCLaw® Beyond the Fundamentals

Billing & Pre-Billing (Overview from PCLaw Fundamentals)

- Overview
- Recommended Billing Procedures

Split Billing

Courtesy Discounts

Accounts Payable

- Creating Vendors
- New Payables
- Entering and Processing Invoices

Recurring Entries

Batch Cheques

Past Due Notices

Template Editor

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PCLaw® Accounting & Month-End Procedures

Dashboards

- Introduction
- My Business (Financial Plan, Key Performance Indicators, Transactions, Marketing & Planning)

Accounting Setup

- Installing PCLaw
- Determining the accounting setup in an existing system
- Tracking revenue by Lawyer or Department
- General Ledger accounts, Bank Accounts, Departments, Parent and Sub-Accounts

PCLaw Data Flow

Opening balances (Matter, Trust, General Bank, Accounts Payable & General Ledger)

Month-End procedures

- Bank Reconciliation
- Journals
- Reports
- General Ledger
- General Ledger Reconciliation Report
- Closing Months

General Ledger Budgeting

Closing Matters

Year-End procedures

Reporting Terminology

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