

Trust  
Accounting

Case &  
Matter Management

Time &  
Expense Entry

Calendaring &  
Contact Management

Mobility

## What's New in PCLaw<sup>®</sup> 13

### LexisNexis<sup>®</sup> PCLaw<sup>®</sup> 13 New Features and Enhancements

#### Billing Email Templates

Maintaining adequate cash inflows is critical to a law firm's success. By email you can deliver bills to clients one to five days sooner than traditional mail, which can help bring money into the firm faster. PCLaw 13 allows you to create customized email templates that automatically pull in relevant PCLaw data while serving as cover letters for the attached bills.

##### Benefits

- Eases the burden of sending bills via email through reusable email templates.
- Present a professional image to clients with a cover letter for your invoices.

#### Client Intake Form

The ability to take on new clients and matters is critical to every law firm's long-term success. Yet, the new client and matter intake process can take multiple days. The client intake capabilities in PCLaw 13 helps streamline the new client and matter intake process, letting you:

- Email a new client/matter intake form to a prospective client using Microsoft<sup>®</sup> Outlook<sup>®</sup> and import the data from the completed form into PCLaw through Microsoft<sup>®</sup> Word.
- Fill out the new client/matter intake form in the software when meeting or speaking with a prospective client. Print the new client/matter intake form for the prospective client to complete.
- Follow-up tasks and appointments can be created and conflict checks performed easily during the intake process. Once you make a decision on the new client or matter, PCLaw can automatically generate an engagement or non-engagement Microsoft<sup>®</sup> Office letter to send to the client.

##### Benefits to Timekeepers

- Enables the new client file to be created quickly to allow billable work to begin sooner and prevent the loss of billable time for work performed during the intake process.

##### Benefits to Billing and Accounting Staff

- Eliminates the need to reenter new client and matter information into the system, saving valuable time.
- Helps make the billing process easier by increasing the accuracy of new client and matter information in the system.

### Benefits to Firm Leadership

- Facilitates the creation of a structured and repeatable client intake process.
- Can push new client and matter intake tasks to non-billable staff, freeing up timekeepers to focus on billable work.

### Security

Enhanced security to restrict users from individual dashboard tabs.

### Dashboards

Updated Dashboard interface with easier access to and from the Quick Step interface.

### Third-Party Product Certifications

The following third-party products will be certified with PCLaw 13, enabling you to leverage your investments in today's technology:

- Microsoft® Windows® 8 and Windows 8 Pro (**Note:** Windows 8 RT is not supported).
- Microsoft® Internet Explorer® 10.
- Microsoft® Office 2013.
- Amicus® Attorney 2013.

### Other Enhancements:

Display your Time Entry notes on prebills with the new Time Entry note token (available in the template editor).

## LexisNexis PCLaw 12 New Features and Enhancements

### Clear, 360-Degree View of All Information Needed to Manage Practice and Business of Law

PCLaw 12 makes it easier for firms to excel not only at the practice of law, but also at the business of law. A new interface combines key front-office and back-office information into an intuitive view, while still giving PCLaw users the option to continue using the current interface they know.

#### “My Practice”

The “My Practice” dashboard is your source of information about what's important to your work today, helping you juggle your busy schedule and deadlines. You can view your:

- Calendar.
- ToDo's.
- Messages.

#### Benefits

- Helps reduce the likelihood of a forgotten appointment or missed task that can lead to a client complaint or malpractice claim.
- Assists you in organizing your day and managing your activities to help prevent you from falling behind on your work.

#### “My Clients”

The “My Clients” dashboard view centralizes all of the relevant information in PCLaw about the client's file, assisting you in providing better service when the client calls. You can view your:

- Appointments, tasks, ToDo's and ticklers.
- Emails, documents and other files.
- Names and contact information of related parties.
- Recent activities on the matter, such as phone calls, notes and time entries.

- Client account details – unbilled time, trust balance, last bill, last payment, last past due notice and other financial information.

#### **Benefits**

- Provides an easy and effective method to get key information about a client or matter.
- Enables you to confidently take the client’s call.
- Saves time getting new firm members up to speed on a particular file.

#### **“My Business”**

The “My Business” dashboard view provides you with the critical information you need to manage the firm’s financial health without requiring you to dig through multiple reports. You can view:

- Financial summaries with drill-down capabilities.
- Automatic and easy-to-understand budget tracking.
- Ability to generate financial statements, income and expense details.
- Key performance indicator monitoring (e.g., billable hours, work in process, receivables, bank balances).
- Access to common financial transactions: bills, payments, past due notices, and cheques.

#### **Benefits**

- Offers you instant visibility into the firm’s health indicators.
- Shows your progress and the firm’s progress toward personal and firm goals.
- Helps you identify financial issues before they become problems.

### **Time Entry Advisor**

The Time Entry Advisor takes the mystery out of capturing billable time. Watching silently in the background, the Time Entry Advisor monitors PCLaw for unbilled documents, events, tasks and other items. At the end of the day, the Time Entry Advisor automatically reminds you to complete time entries for them, making sure you get paid for the work you do.

#### **Benefits to Timekeepers and Staff**

- Provides an easy-to-use way to help you capture all possible billable time.

#### **Benefits to Billing and Accounting Staff**

- Helps your billing process run more smoothly – minimizes the need to chase timekeepers at the end of the billing cycle and to load time into the system at the last minute.
- Creates more accurate bills and speeds payment.

#### **Benefits to Firm Leadership**

- Improves the firm’s overall profitability by reducing “lost” billable time.

### **PCLaw® Mobility Features**

The PCLaw Mobility service has been expanded to give you additional organization and control over your matters and finances when on the go. Using your smartphone or mobile device with a live Internet connection, you can:

- Know when your colleagues and staff are available to meet by viewing their PCLaw calendars.
- Keep track of your activities by viewing your PCLaw ToDo/Task records and marking them complete.
- Get critical information fast by viewing your PCLaw Note records.
- Easily access all PCLaw documents.
- Provide higher levels of client service by finding the document you need quickly.
- Minimize errors and prevent wasted time by viewing the document record details, including related client and/or matter records.
- Be even more productive when you’re out of the office with the ability to email one or more PCLaw documents.

## Improved General Retainer Handling of Client Overpayments

Helps you manage client overpayments upon recording an entry via various user-friendly options, including (1) send the overpayment to trust, (2) pay other invoices for the same client, and (3) create a client refund. Alternatively, restrict a payment from going into your general account as a retainer and prompt the user to record it to the trust account instead.

## Calendar and Tickler

Calendar and tickler enhancements in PCLaw 12 help you keep your days and deadlines under control:

- The calendar has been redesigned for easier use, with day, workweek and month views.
- The “time view” of the calendar provides a visual alert for days without time entries.
- Calendar appointment codes can be colour-coded so you can see the type of event at a glance.
- A timer has been added to the ToDo window of the calendar.
- The tickler workflow has been redesigned to help you better manage chains of events.
- Anchor and limitation dates may be added to tickler items and new events linked to existing ticklers.

## Security

In PCLaw 12, the Client Manager and Contact Manager have the same field-level security options as currently available in the Matter Manager, helping you comply with client confidentiality requirements.

## Budgeting

Twelve-month general ledger budgeting capabilities have been added in PCLaw 12 to help you gain a better understanding of your firm’s finances and identify financial issues before they become problems.

## Time Sheet

PCLaw 12 includes a system-level setting to allow notes to be added to time entries, providing valuable context. The notes are linked to the time entry, but do not show on the prebill or final bill.

## Matter Management

PCLaw 12 helps you track the client information you need and manage it so it can be retrieved easily:

- Designate relationships between clients in the Matter Manager (e.g., husband/wife, company contact, etc.) to keep records organized.
- Create and apply user-defined categories to clients and contacts to maintain valuable information and assist in filtering client and contact reports.

## Past Due Notice

When working with Past Due Notice billing templates in PCLaw 12, you can save a Past Due Notice in Adobe® Acrobat® PDF format and generate an email with the Past Due Notice attached.

## Conversion Process

The conversion process has been streamlined to simplify and ease your upgrade to PCLaw 12 from previous versions of the software.

## Support for Microsoft® Windows® Terminal Services

PCLaw 12 can be used in a Microsoft Windows Terminal Server environment, allowing your firm to:

- Lower its risk of data loss – with no software or data installed on the local machines, there is less risk of a data breach through hardware loss, hackers, and disgruntled staff.
- Give remote staff access to PCLaw 12 from their desktops and laptops as if they were in the office with you.
- Easily apply future PCLaw software updates and upgrades – because the PCLaw software is only installed on the server and not on individual desktops, software changes are distributed to users when they next log into the system.
- Maximize your existing hardware investments.

## Third-Party Integrations

The following third-party integrations will be certified with PCLaw 12, enabling you to leverage your existing software investments:

- Amicus® Attorney Premium Edition 2012.
- Amicus Attorney Small Firm Edition 2012.

# LexisNexis PCLaw 11 New Features and Enhancements

## PCLaw Mobility Service

The PCLaw Mobility service provides secure, real-time access to your PCLaw matters and contacts, plus allows you to enter time and expenses from most web-based mobile devices and smartphones with a live Internet connection. The PCLaw Mobility service enables you to:

- Convert time out of the office to additional billable hours.
- Capture billable time and expenses when they occur – on the go.
- Increase the accuracy of billable hours and expenses by capturing them “at the source.”
- Ensure simple, secure, anytime, anywhere access to critical case, matter and client contact information.
- Boost client service levels through faster responses – no need to call the office to find information.
- Improve timekeeper and staff productivity by eliminating the need to reconstruct billable time and expenses incurred after the fact.

## Integration with Fujitsu® ScanSnap Desktop Scanners

PCLaw software integrates with Fujitsu ScanSnap desktop scanners to take the complications out of document imaging for firms going digital. You can scan documents directly from any Fujitsu ScanSnap desktop scanner, easily associate them with a case or matter in the PCLaw software and store them using PCLaw document management capabilities.

## Advanced Security Features

You can implement these additional security protocols to prevent unauthorized software access, maintain compliance with client confidentiality requirements and protect sensitive firm information:

- Require the use of strong passwords.
- Set passwords to expire after a specific number of days.
- Lock users out of PCLaw after a predefined number of failed logins.
- Allow users to change their own passwords.
- Disable specific users.
- Prevent password reuse.
- Send emails to users when they set their passwords.

## Holiday File Improvements

Improvements to the holiday file and holiday file import process give you more control over how your firm's calendar is customized. You can choose which holiday file to include in your firm's calendar – it will not be automatically imported based on the country listed on your LexisNexis Practice Management account. You can even import multiple holiday files.

Also, a new holiday calendar including Jewish holidays has been added, for firms whose staff or clients observe those days.

# LexisNexis PCLaw 10 New Features and Enhancements

## Accounting

### Banking

- General retainer balance threshold.
- Increase client cheque number.

### General Ledger

- Option to select all general ledger accounts when running financial statements.
- General ledger adjustments into a bank account reflect on the General Bank Journal Report.
- Improved search ability in general ledger account listing.

### Trust Accounting

- Trust balance threshold.
- Increase client cheque number.
- Trust ledger threshold.

## Billing

### Fee Adjustments and Courtesy Discounts

Changes to the processing of fee adjustments and courtesy discounts for individual client's matters give you more billing control:

- **Specific Matter:** All fee changes or discounts are assigned to a specific matter.
- **Prorated:** All fee changes are prorated for all matters for that client based on billing amounts.
- **Manual Allocation:** You specify how to divide the allocations for the client's matters.

The courtesy discount feature allows you to prorate the discount amount for each matter under a specific client when performing a mass billing by client.

### General Billing Capabilities

The following billing capabilities have been included:

- Prioritize time entries.
- Refresh the prebill.
- Exclude bill if there is an accounts receivable balance.
- Additional billing reports.
- Pay off previous balances from client trust accounts during billing.

### Rate Exceptions

Expanded rate exceptions now include exceptions at the matter level based on explanation codes, giving you greater billing flexibility per client.

### Template Editor

These additional template tokens help you display exactly what you want on your invoices:

- Formula elements and new tokens.
- Display Invoice Number on the Billing Summary Page.

### Time Tracking by Hours and Minutes

All time-tracking features – tokens, reports, billing, the Quick Timer and others – have been modified to track your time using hours and minutes instead of the decimal system to facilitate more accurate bills.

## Document Management

### Safe Custody Document Storage and Retrieval System

The Safe Custody document storage tracking and retrieval system helps you manage physical files and comply with record retention requirements. You can monitor the location of physical client items and records (wills, deeds, bonds, closed files, etc.) easily, specify review dates for individual records and attach scanned images to records.

The Custody Listing is a new report corresponding to the Safe Custody feature for physical file management. It displays all movements, packets, and records you have created using the Safe Custody Manager.

## Productivity

### Automatic Backup with Scheduler

Automatic backup capabilities make protecting your data easy.

- Schedule automatic PCLaw database backups to run by calendar day, business day, week or month – at a convenient time for your firm.

# LexisNexis PCLaw 9.2 New Features and Enhancements

## Accounting

### Accounts Payable

- Add existing expense recovery entries to a new payable.
- Display a list of existing expense recoveries for a particular payee.

### Banking

- Perform general-to-trust transfers.
- Display deposit slip details in the General Bank Journal and Trust Bank Journal Reports.

### General Ledger Accounting

- See general ledger accounts in a multilevel tree view.
- Use the Date Entered token on general ledger statements.
- Sort general ledger statements by date entered.

## Billing

### General Billing Improvements

- Create default matter bill setting profiles. Assign a matter bill setting to an individual matter or to multiple matters at the same time.
- Assign a specific bill setting template to a type of law.
- Use a “No Charge” task code with time entries when needed.
- See the rate detail for task codes.

## Case and Matter Management

### Research

Allocate research-related charges automatically with the PowerInvoice™ integration with the PCLaw software.

- Download research charge details from PowerInvoice using the Cost Recovery layout.
- Import the charge details directly into the PCLaw software.

## LexisNexis PCLaw 9 New Features and Enhancements

### Billing

#### Bank Reconciliation

- View cheque and receipts easily in a split screen.
- The balances area is reorganized to group items the way you work.

#### BillFlow Manager Billing Workflow Capabilities

The BillFlow Manager enables you to save a collection of matters that you bill together into a simple workflow.

- Review a collection of invoices, assign a specific timekeeper to individual matters or the entire collection, and adjust charges while keeping the invoices in a review stage.
- See at a glance which matters are excluded from the invoice collection.

### Reporting

- Filter customizable reports with enhanced filtering capabilities.
- Reconcile firm cash flows using the General Bank Missing Cheques Report and Trust Bank Missing Cheques Report.
- Refresh a report automatically without leaving the screen.
- Select report layouts easily with the new layout drop-down list in the Report toolbar.
- Sending a report to Microsoft® Excel® and automatically open the spreadsheet file.
- Specify the entries to display by selecting Include Void/NSF Items Only, Show Only Amount Over and Include Negative Amount from the Other tab of the General Bank and Trust Bank Journals.
- Choose the entries to include on the Work-in-Progress Report.
- Omit non-billable task code types and the Never Bill hold option from the Work-in-Progress Report using the Non-Billable Time Entries and/or Never Bill Time Entries filters.
- Add the Entry Date Changed and Entry Date Entered tokens to your report layout to track user modifications.

## Case & Matter Management

### Calendar and Phone Calls

- See more of the Memo area on all phone events.
- Obtain the Matter Description on individual appointments, appointment listings and appointment schedules.

### Data Entry

- Customize spell-check preferences per workstation.
- See alternate choices for misspelled words in the dictionary.
- Make specific time entry fields mandatory.



### Matter Manager

- Include custom memos on bills and prebills.

### Template Editor

The following fields have been added to the label template:

- Client Address Country.
- Billing Address Country.
- Opposing Lawyer(s).
- Opposing Party(ies).
- Matter-Introducing Lawyer and Initials.

## Productivity

### Lawyer Overview

Select multiple lawyers using the Lawyers Overview. To use drill-down capabilities in PCLaw, however, only one lawyer can be selected at a time.

### Quick Step

The Quick Step feature allows you to launch another software application from inside PCLaw.

# LexisNexis PCLaw 8 New Features and Enhancements

## Licensing

Activate changes to your PCLaw licensing online.

## Reporting

### Customizable Reports

You can customize the following reports:

- Write-Up/Down Journal.
- Client Summary.
- Client Ledger.
- Client Fees Listing.
- Client Trust Listing.
- Client Trust Ledger.

### Report Tokens

You can add the following tokens to the layout of the Billing Fees Journal Report and Receivable by Client Report:

- Interest Due.
- Interest Paid.
- Matter Introducing Lawyer Percent.
- Receipts since Last Billing by Fee Credit Lawyer.
- Retainers Billed by Fee Credit Lawyer.
- Total Outstanding by Fee Credit Lawyer.
- Total Paid by Fee Credit Lawyer.

### Template Editor

In a Receipt template, you can add a Client Cheque Number token. The Client Cheque Number token coincides with the Client Cheque Number shown in receipt windows.

## Search Indexing

Select the computer to use for indexing results during conflict of interest and global searches.

## LexisNexis PCLaw 7.6 New Features and Enhancements

### Accounting

#### Trust Bank Journal

You can add the method of payment to the Trust Bank Journal.

#### General Bank Journal

You can add the method of payment to the General Bank Journal.

#### Payment Method

Electronic wire transfer payments have been included as a supported payment method for general and trust receipts.

### Case and Matter Management

#### Web Timer

- Make a Web Timer entry an expense.
- View references for the current research entry, open existing research entries and save the web timer entry into the PCLaw research database using the Web Timer toolbar buttons.

### SQL Database

Along with the CTREE database version of the PCLaw software, a Microsoft® SQL Server® version is available.<sup>1</sup> The SQL Server version has the same look and feel as the CTREE version but offers the scalability, reliability, and accessibility advantages of a SQL database structure.

## LexisNexis PCLaw 7 New Features and Enhancements

### Accounting

#### Account Payable

Account Payable is now a standard feature in PCLaw.

#### Cash Flow Planner

The Cash Flow Planner shows cash on hand, cash billed and cash received in the month as well as aged Accounts Payable, Accounts Receivable and Work-in-Progress.

#### Cheques and Receipts

- Print general and trust cheques in a batch.
- Enter eight-digit general and trust cheque receipt numbers.
- See default template information in Additional Receipt, Additional Cheque and Additional Payee Information windows.

#### Deposit Slips

Deposit slips are now a standard feature in PCLaw.

#### General Ledger Adjustments

A new Print button prints a record of any adjustments to the General Ledger.

#### General Ledger Statements

When a range of General Ledger accounts is selected, the account nickname is displayed in addition to the account name. Additionally, you can produce a General Ledger Statement for a selected set of General Ledger accounts.

<sup>1</sup> PCLaw software using a Microsoft SQL Server database has been available since PCLaw 7.6.

### Mark Offsetting Accounts Receivable as Paid

A new PCLaw utility cancels out positive and negative outstanding invoices of equal amounts if the Accounts Receivable balance for the matter is zero. Both invoices are marked as Paid so the matter can be closed; however, the payments will not appear on the General Bank Journal.

### Matter-to-Matter Transfers

- Transfer a general retainer from one matter to another.
- Transfer multiple disbursements from one matter to another.

### Receivables by Client

Summaries by collecting, responsible, client-introducing and matter-introducing lawyer are available.

### Trust-to-General Transfers

Interest amounts, invoice numbers and general ledger accounts can be changed in trust-to-general transfers.

## Billing

### Billing (Fees) Journal Enhancements

- Sort the invoices by invoice number.
- Print invoices in date order for each matter if the invoices are sorted by matter.

### Electronic Billing

- Two new boxes on the Special Fields tab of the Lawyers and Rates menu (**Options → Lists → Lawyers and Rates**) have been included in the optional Electronic Billing module.
- Two new firm identifiers have been added to the Firm tab of the Systems Setting menu (**Options → System Settings**).
- Instead of using the Custom tab in the Open Matter feature to enter extra information required for electronic bills, you can use the Default tab in the Matter Manager.

### Prebills

You can drill down on a prebill to make changes and preview those changes.

### Recurring Entry Enhancements

- Create quarterly and semi-annual recurring entries.
- Sort the list of recurring entries by name, next due date or frequency.
- Receive a warning message when a recurring entry with today's date not equal to the due date is entered.

## Quick Bills

You can change the invoice number on a Quick Bill as long as "Restrict Invoice Number Override" is not selected in System Settings. Quick Bills will now include charges from the Client Ledger. Disbursements will be included in the disbursements section. Time will be included in the fee total, but will not be part of the fee description.

## Document Management

### Appointment Schedule Report Enhancements

Enhancements to the Appointment Schedule Report permit the inclusion of Appointments and ToDo's.

## Document Manager

PCLaw includes a document management system that allows you to save external text and other file types (such as \*.PDF, \*.JPG, \*.GIF, \*.AVI) in the PCLaw software. Each file can be associated with a matter. You can also include information such as the author, document type/description, comments and creation date/time. Additionally, you can open and change any PCLaw document in Microsoft Word.

The PCLaw Document Manager organizes your documents, email and precedents by matter. Filters allow you to select a particular Author, Creation Date Range, Modified Date Range or Document Type, while document searches enable you to look by filename or for specific text in a document's comments, description or content.

## Case and Matter Management

### Appointment Listings

The Common tab contains a new option to Include Phone Calls. Additionally, only appointments associated with a particular contact may be shown by using the Contact button.

### Calendar

Additional filtering capabilities include:

- Completed ToDo's, Appointments and Reminders.
- Uncompleted ToDo's, Appointments and Reminders.
- Both completed and uncompleted ToDo's, Appointments and Reminders.
- Exclude ToDo's, and Reminders.
- Show ToDo's only if they are due.

### New Matter

The New Matter feature has been changed to only require mandatory information. Further customization may be done in the Matter Manager.

### Matter Manager

- The Matter Manager replaces the Open Matter feature and contains all the information previously found in the Open Matter window.
- The Billing Info and Other Info tabs have been replaced with the Billing and Settings tabs.

### Renumbering Matters and Clients

The Renumber Matter/Client feature permits you to change a matter nickname, change a client nickname or transfer a matter to a different client.

### Closing Matters

When you close a matter, if the matter has unbilled disbursements in a closed month, PCLaw will ask if you want the unbilled disbursements reversed before closing. If you do not reverse the unbilled disbursements, you will not be able to close the matter.

### Custom Tabs

- Custom tab creation has been redesigned.
- Custom tabs can be associated with specific matters or type of law.

### Phone Calls

While recording a call in the New Phone Call window, you can access the other managers or the calendar at the same time.

## Phone Call Manager

You can track both phone calls and phone messages using the Phone Call Manager.

## Reporting

### Appointment Schedule Report Enhancements

You can include Appointments and ToDo's in the Appointment Schedule Report.

### Document Listing Report

You can customize the Document Listing Report to include the Matter, Document Name, Document Type, Type of Law, Creation Date, Last Modified Date, Description and Comments. However, if you select Simple Format, only the Matter, Document Name, Description and Comments will appear.

### General Retainer Report Enhancements

Enhancements to the General Retainer Report allow the inclusion of the amount of retainers used in the period applied against the responsible lawyer and the matter quoted amount.

### List of Clients Report Enhancements

You can include the billing address and matter-introducing lawyer in the General Retainer. If a matter has been closed, the Destroy Date will appear on the report.

### Matter Status Report

The Matter Status Report lists the dates of the last document, time entry and appointment entry for each matter. You can see the matters with activity between a specific set of dates and matter balances.

## Settings

### Manager Filters

You can reset the filters in all the managers using the Default button.

