PCLaw® Web-Based Training

We are pleased to offer web-based training to PCLaw users. To better meet your needs and schedule, we provide sessions on a regular basis. Sessions are approximately 1 ½ hours each. Sign up for our web-based sessions, tailored to specific features and areas of the PCLaw billing and accounting software.

The following modules are available:

1. Clients and Matters
2. Data Entry
3. Advanced Data Entry
4. Billing
5. A/R, Payments and Write-Offs
6. Template Editor — Basics for Billing
7. Data Flow
8. Month-End Procedures
9. Introduction to PCLaw Front Office

Cost is $199 (+ applicable taxes) per session per attendee. Save 30% if you have a current PCLaw annual maintenance plan. For this session, you require:

- An Internet connection on your computer to access the training session
- Telephone access to listen to the training session
- Microsoft® Internet Explorer® to view the training session

For more information or to register, please call 1-800-328-2898.

Module 1: Clients and Matters

- Conflict and Global Search
- Conflict Search / Global Search
- Matters
- Matter Manager
  - Main Tab
  - Billing Tab
- Renumbering Matters/Clients
- List of Clients

Module 2: Data Entry

- Time and Fees
  - Timesheet
  - Quick Timer
  - Web Timer
  - Fee Sheet
  - Correcting Time and Fee Entries
• Client Costs
  o Expense Recovery
  o Cash Disbursements (General Cheques)
  o Recording Transaction Levies (Ontario)
  o Recording Transaction Levies (Newfoundland and Labrador)
  o Correcting Expense Recovery and General Cheque Entries
• Trust
  o Trust Receipt
  o Trust Cheque
  o Matter-to-Matter Transfer
  o Bank-to-Bank Transfer
  o Trust-to-General Transfer
  o Correcting Trust
• General Retainers
• Correcting General Retainers

Module 3: Advanced Data Entry

• Accounts Payable
  o Creating Vendors
  o Entering Invoices
  o Entering Invoices and Processing from a Single Screen
  o New Payable
  o A/P Reports
  o Correcting Payables
• Remitting GST
• Memorized Transactions
• Recurring Entries
  o Creating Entries
  o Access from the Recurring Entries List
• Batch Cheque Printing
  o Turning On the Batch Cheque Printing Feature
  o Adding Cheques to Batch Cheque Printing
  o Printing Cheques from Batch Printing

Module 4: Billing

• Billing Overview / Recommended Billing Procedures
• Creating a Pre-bill
• Anticipated Disbursements
• Split Billing
• Courtesy Discounts
• Undo Bill
• Quick Bill
• Creating Bills with the Quick Bill Feature
Module 5: A/R, Payments and Write-Offs

- Past-Due Notices
- Setup Interest for the Overall System
- Override the System Settings on a Matter-by-Matter Basis
- Change or Add Interest to Existing Invoices within the System
- General Receipts
- Receive Payment
- General Retainer
- Firm Receipt
- Change/Write-Off Bill

Module 6: Template Editor — Basics for Billing

- What Is Template Editor?
- How to Access the Template Editor
- Creating New Templates
- Saving Templates
- Defining Elements
- Placeholders for Variable Information
- Billing Templates
- Types of Sections
- Past-Due Notice Templates
- Special Elements (Age Phrase)
- Changing Phrases
- Other Templates

Module 7: Data Flow

- Chart of Accounts — Add/Change
  - G/L Accounts
  - Bank Accounts
  - Other Control Accounts
- General Ledger Transactions for the Following Functions:
  - General Cheques
  - Trust Cheques
  - Expense Recovery
  - A/P
  - Bills
  - Payments
  - GST Remittances
- Opening Balances for:
  - General Bank
  - GST
- Client-Related Items:
  - Trust
  - A/R
  - Unbilled Fees and Disbursements
Module 8: Month-End Procedures

- Reports Groups
- G/L Reconciliation Report
- Bank Reconciliation
- End-of-Month Function
- End-of-Year Function
- Closing Files

Module 9: Introduction to PCLaw Front Office

- Contact Management
  - Entering Contacts/ Changing Contacts
  - Associating contacts with appointments
  - Associating contacts with matters
  - Contact reports
- Calendaring
  - Calendar Setup
  - Appointment Codes
  - Location Codes
  - Scheduling Appointments
  - Posting Time from Appointments
  - To Do’s
  - Recurring Activities & Linked Dates
- Phone Call Manager
  - Overview
  - Workstation Settings
  - Adding Phone Calls
  - Adding Messages

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