Tips & Tricks- Best Practices for Using PCLaw in Your Firm

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Customize the Quick Step menu

- Remove the Help Panel to add a third row of functions on each tab

- Utilize the empty Favorites screen!

- Switch between the Work Flow Style or the traditional functional area Quick Step (only in v9.20 and above)

Customize the Toolbar and Hot Keys

- Click on the "down arrow" to the far right to add or remove buttons for functions or reports.

- Or go to Options > Customize

- Hot Keys are keyboard shortcuts which you can modify

Workstation Settings

Configure your PCLaw settings for how <u>you</u> want to work.

Some settings to consider:

- Close Data Entry Window on OK
- Process Enter Key as Tab Key
- Auto Expand Exp. Codes
- Default Timekeeper
- Auto Fill Matter field from Description
- Global Search Index

Registers

The utility to view, modify or remove most transactions in PCLaw.

Available for Time, General Bank, Trust Bank, Expenses, Invoices, Ledger, A/P, Matter and Appointments

- Use Restore Columns to correct column widths
- Change Column order by dragging
- Sort Columns by clicking on column header
- Search the Register by using the magnifying glass icon

Report Options and Printing

- Double click to drill down to an entry
- Refresh and Reload buttons on the toolbar
- Print all pages
- Print consecutive pages
- Print consecutive lines
- Save report (PDF, RTF, TXT, XLS)
- Email
- Binoculars to search within the report

Pre-Bill Summary Report and Skipped Matter List

- The Pre-Bill Summary Report is a useful report to summarize a Pre-Bill batch and to review what Pre-Bills will print before printing the entire batch

- Quantifies the value of that Pre-Bill batch to reinforce to the attorney that the stack sitting on the desk is more than just paper

- Can be used as a checklist if Pre-Bills are not returned at the same time

- Run the Skipped Matter list immediately after the Pre-Bill run

- Adjusting the minimum charges at the Pre-Bill stage can cause a matter to get excluded and noted as Insufficient charges

- The Billing Frequency in Matter Manager will determine when a matter is eligible for mass pre-billing

- A subsidiary matter created by Split Billing may show as Skipped if the unbilled charges are on the master matter

System Settings – PCLaw global settings

- Show Vendor in Paid To Pop Up Help
- Show Clients in Rec'd From Pop Up Help
- Save Time in Hrs and Mins – NEW to v10
- Use Qty x Rate for Exp. Codes such as photocopies
- Banking – Save Entries on Print
- Batch check printing
- Matter – New Matter Settings
- Billing – Save PDF to Doc Manager
- Memorized Transactions Edit Payee

Viewing Time on the Calendar

- Excellent tool for users to quickly view time for a month
- Shows days without time
- Easier than running a report
- Double clicking a day allows you to edit time, or if the day is blank you can add new time
- Setup the Calendar in Lawyers & Rates
  - If Daily Hours goal is set, the calendar will show red days when hours are less than goal
  - If no goal is set, days with no hours show as red

Matter Manager – Summary Tab

- Shows key balances for Unbilled Fees, Disbs. A/R, Trust
- Shows key dates for Last bill, Last entry, Last trust
- Efficient workflow allows user to mouse click on any of these totals and get to the Register showing the details
- No need to run a report when this information is available
- Client Totals button at the top shows balances for all matters for that client or their other matters

Matter Manager – New Matter Setting

- Located on the Settings tab
- This allows you to create unique defaults for new matters for that client
- As an example, for a certain client, the Resp. and Assig. Lawyers are always the same. Now you can default these settings to all new matters for that client
- Other defaults include the Billing Rate, Interest Rate, Billing Address and Type of Law

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Matter Manager – Rate Exceptions

- New to v10

- Rate exceptions are overrides to the default rate for the matter

- It may be the complete rate for a lawyer, for a specific task, or a combination of both

- If multiple rate exceptions are specified, combined lawyer/tasks overrides take priority, followed by task code overrides, and then lawyer overrides

- Can be used for costs too - Insurance Defense (e.g. The firm charges $.25 per copy but the client will only allow $.10)

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Billing Cycles – Cycle 1 – 6

- Billing cycles define the frequency in which the matter is eligible for a pre-bill or bill (under mass pre-bill or bill)

- Include and exclude are self explanatory

- Monthly, Quarterly, etc. – Looks to the last bill date or if no first bill yet, looks to the File Open Date

- Cycles 1 – 6 are "Firm" defined and another tool to segregate your matters (e.g. matters that you may want to run pre-bills on but not include in regular pre-bill runs)

- Useful because you cannot run pre-bills on Excluded matters cycle but you can on Cycles 1 – 6

- Also able to run Client WIP for these cycles

Deposit Slip Module

- Consolidates your daily receipts into a deposit total

- Uses an actual laser deposit form

- Confirms accuracy of receipt entry that day rather than at the end of the month

- Shows you deposit slip total in Bank Reconciliation; matches what is on the bank statement – no more calculator!

- Still consider using this module if you are not using the laser form – print on white paper and still get the same benefits

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Billing Fees Journal

- Report to determine the A/R split for fees and costs
- Useful when trying to determine a payment negotiation with client
- Useful if you have to write off an amount, you will be able to adjust fees and costs accurately
- When run for Firm totals, you can determine total costs outstanding to the firm
- In v10, if you split hard vs. soft costs, those totals are now split on the report

Bank Reconciliation Best Practices

- Assign different people to enter checks and receipts versus performing the bank reconciliation
- Print Missing Checks report under Reports | Journals
- Print bank journals to show corrected entries and use Template format to show User name
- Use the System Setting "Save Entries on Print"
- Bank statements mailed to a Partner's home and opened by the Partner
- Partner to review and sign off on monthly bank reconciliation reports
- Review copies or images of cleared items
- Void checks and reissue if necessary

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Questions?

Thank you!

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