LexisNexis®

2009 Practice Management Conference

PCLaw Tips & Tricks Best Practices

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PCLaw Tips & Tricks Best Practices

<div align="center">

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PCLaw Tips & Tricks Best Practices

Customize the PCLaw Desktop

Customize these to be more effective.

- Quick Step
- Toolbar
- Workstation Settings

Quick Step

Quick Step provides an alternative to the pull down menus for accessing PCLaw features. It consists of

- Quick Step Tabs: Groupings organized to the different types of tasks that you perform
- Task Buttons: A visual way to access common used features – functions and reports – rather than having to work through a series of menus to locate the task.
- Help Panel: Description of a PCLaw feature.
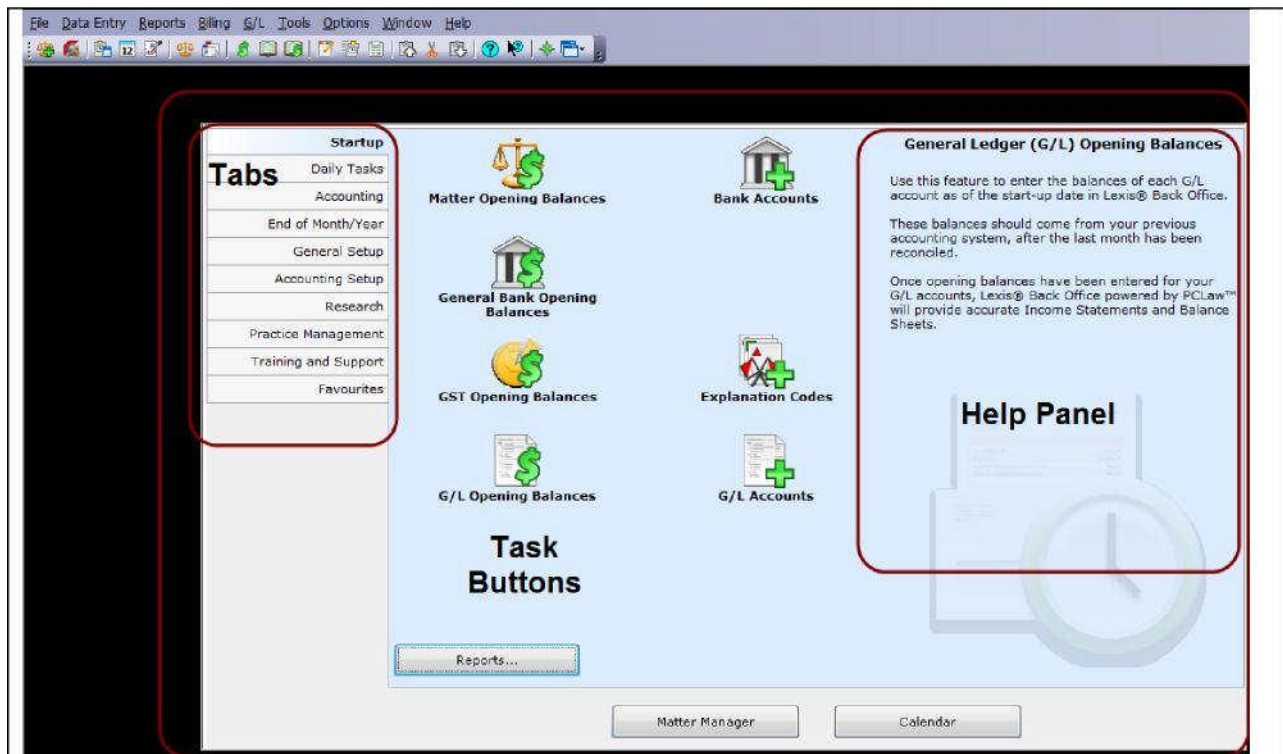
You can:
- Task Buttons: Remove/Add/Change in any or all of the Quick Step Tabs.
- Help Panel: Remove to make room for 5 more buttons in each Quick Step Tab.
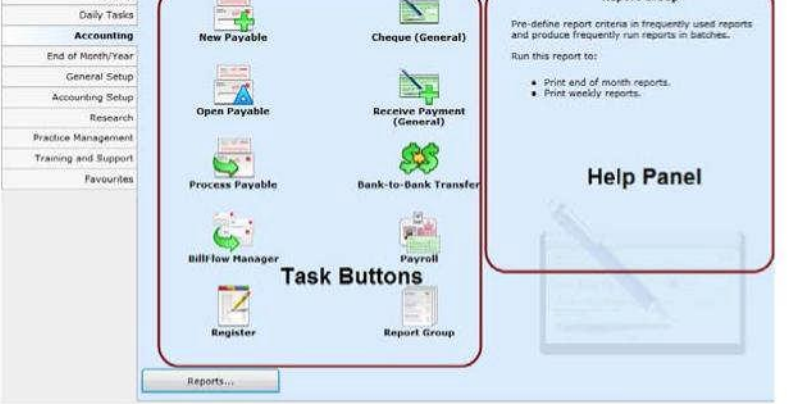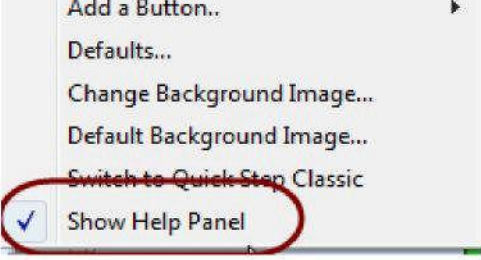
Task Buttons

In any of the Tabs, reorganize the task buttons as the tasks you most commonly use.

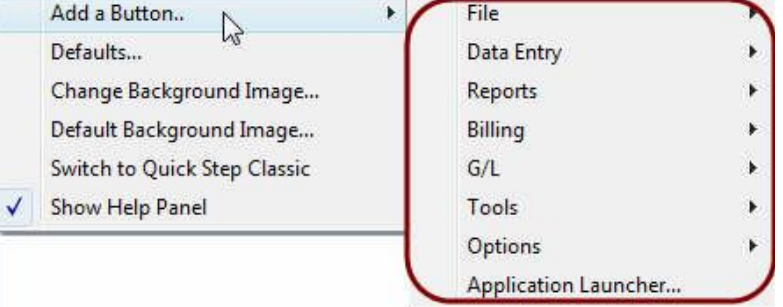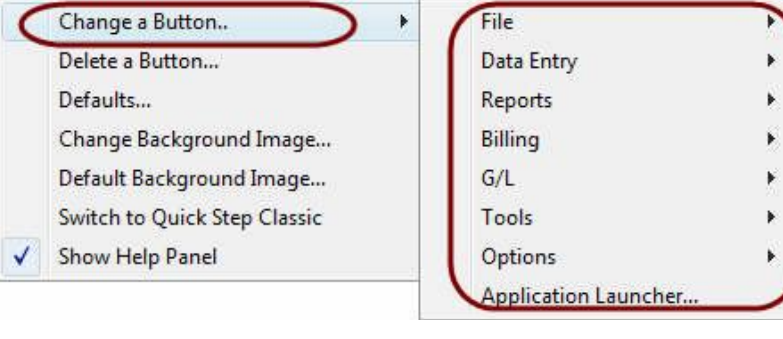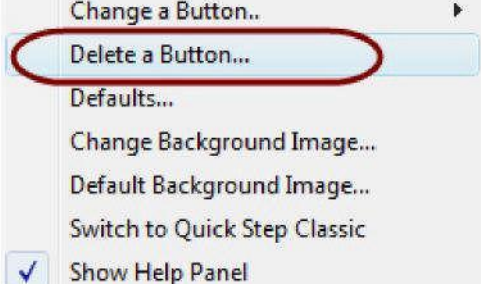|	
Add a Button Right-click over 'empty space' in a Quick Step tab.	Add a Button.. ▶ Defaults... Change Background Image... Default Background Image... Switch to Quick Step Classic ✓ Show Help Panel

Mouse-over "Add a Button" to access a drop down list that shows the same choices as in the PCLaw main menu.
 	
Select your choice as applicable to add a new task.
	Add a Button.. ▶ File ▶
	Defaults... Data Entry ▶
	Change Background Image... Reports ▶
	Default Background Image... Billing ▶
	Switch to Quick Step Classic G/L ▶
	✓ Show Help Panel Tools ▶
	  Options ▶
	  Application Launcher...

Change an Existing Button Right click over an existing button.	Startup Daily Tasks **Accounting** **New Payable** End of Month/Year General Setup Accounting Setup **Open Payable**
Mouse-over "Change a Button" to access a drop down list that shows the same choices as in the PCLaw main menu. Select your choice as applicable to replace the existing button with a new task.	Change a Button.. ▶ File ▶ Delete a Button... Data Entry ▶ Defaults... Reports ▶ Change Background Image... Billing ▶ Default Background Image... G/L ▶ Switch to Quick Step Classic Tools ▶ ✓ Show Help Panel Options ▶ Application Launcher...

Delete an Existing Button Right-click over an existing button as above and left-click to select "Delete a Button".	Change a Button.. ▶ Delete a Button... Defaults... Change Background Image... Default Background Image... Switch to Quick Step Classic ✓ Show Help Panel
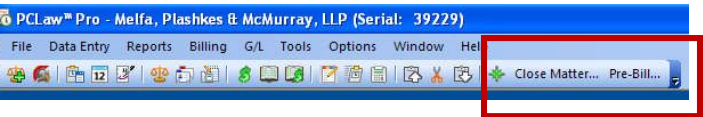
Help Panel

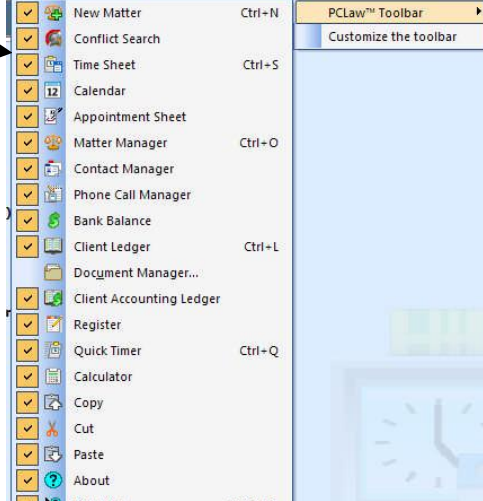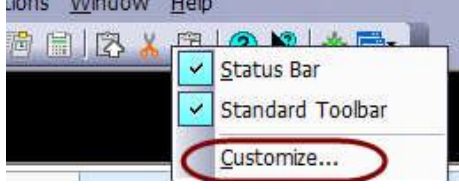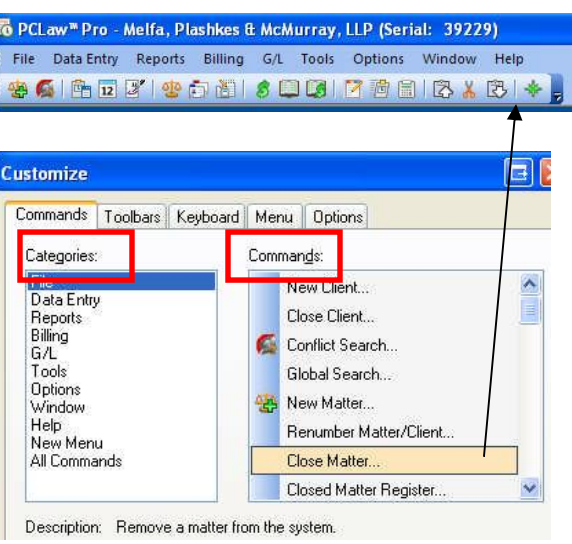|	
Each Quick Step Tab displays 2 columns of Task Buttons when the Help Panel is displayed – 10 Task Buttons per Tab. If you remove the Help Panel, you will have room for a 3rd column of Tasks – giving you 15 Task Buttons per Tab.	
Right click anywhere in the Quick Step Tab. You will see that "Show Help Panel" is selected. De-select "Show Help Panel".	Add a Button.. ▶ Defaults... Change Background Image... Default Background Image... Switch to Quick Step Classic ✓ Show Help Panel
Add new Task Buttons in the column provided.	

Toolbar

You can remove buttons from the Toolbar to display only functions that you use…. or add buttons to the Toolbar to make commonly used functions/reports more easily accessible.

The PCLaw default Toolbar is situated under the Menu as follows:	PCLaw™ Pro - Melfa, Plashkes & McMurray, LLP (Serial: 39229) File Data Entry Reports Billing G/L Tools Options Window Help *Recall that you can mouse-over a button on the toolbar to view a description of the button.*

Click on the small down arrow at the far right of the toolbar Add or Remove buttons Select PCLaw Toolbar From this list you can uncheck the icons you do not want	
Go to the Options pull-down menu and select Customize	
To add buttons: In Categories (1) select the item that matches the Menu where you find this function. In Commands (2) select the function. Click and **drag the function** to the position on the Toolbar. Click **Close**.	
Here is the toolbar after we added the Close Matter and Pre-Bill buttons	

Workstation Settings
Options>Workstation Settings

In the *Options* menu, access *Workstation Settings.* Configure your **Workstation**. You can change settings that affect the way you work:

- Close Data Entry Windows on OK

- Process Enter Key as Tab Key

- Auto Expand Codes on <Space>

- Default Timekeeper on Time Sheet

- Remember Last Matter in Matter Manager

- Auto Fill Matter from Description

- Global Search Index from this Station (Other Tab)
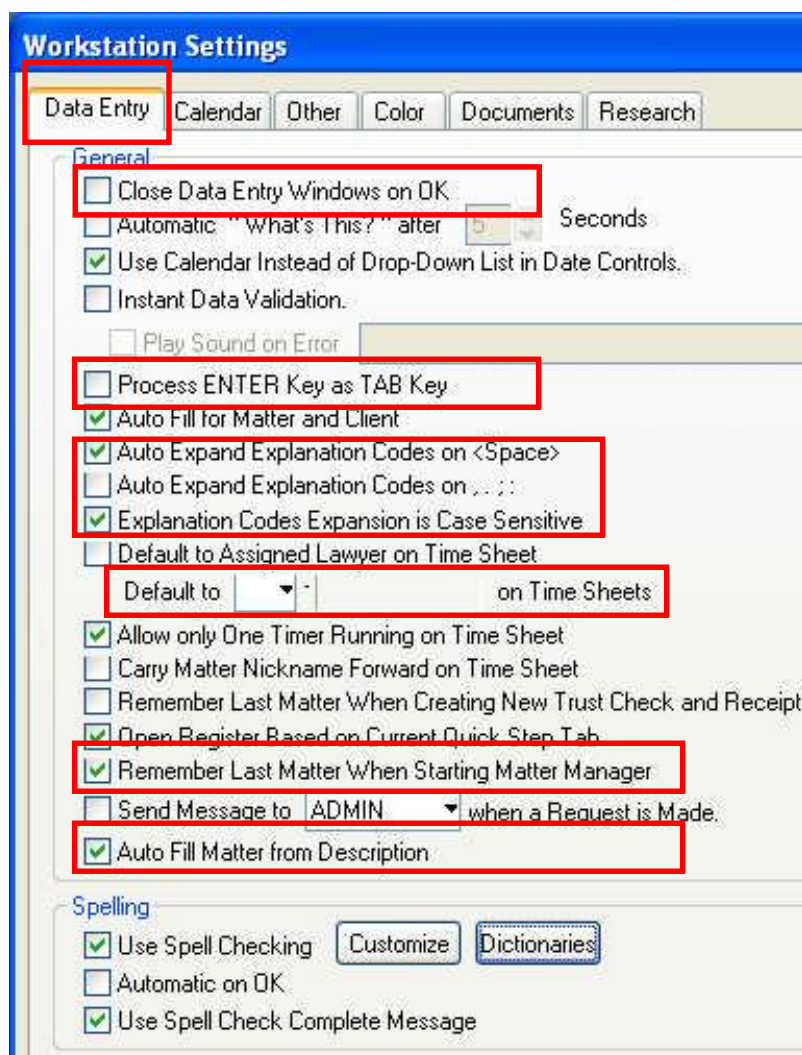
*Note that Workstation Settings are per Workstation and **not** per User.*

Data Entry Tab

Close Data Entry Windows on OK	To select or deselect depends on the functions you use in PCLaw and your role in the firm. A bookkeeper will probably want to deselect this function; a secretary, clerk or attorney will probably want to select this feature. When you are entering a check or a time sheet, you click "OK" to save and close when applicable. - If you want another check/time sheet window available immediately, then deselect "Close Data Entry Windows on OK". - If you want Quick Step as the view on the desktop, then select.
Process ENTER Key as TAB Key	In PCLaw, you can move from field to field by pressing the TAB key. If you select this option, which is the default setting, you can also press the TAB key to move →in a window. (Press Shift+Tab to move ←)If this setting is selected, pressing the ENTER key will select the OK button and save a window possibly before you have had a chance to complete information. Many users are accustomed in other programs to press the ENTER key to move to the next field. If this is the case, then uncheck the setting so that pressing ENTER will advance through the fields. Note though that users will then have to use the mouse to click the "**OK**" button and save a window.
Auto Expand Codes on <Space>	Explanation codes for time and expenses can be alpha and numerical. If you have numerical codes and if you have codes that might be shortforms that users type, then a user can inadvertently expand an explanation code into text – this is annoying and can lead to errors. Example: assume that 'dr' is the explanation code for 'Drafting documents' – the intention is to use this code as an explanation code for time docketing. If a user refers to a doctor in a time docket as *Dr Jones* or *Dr. Jones*, you might see the following text *Drafting documents Jones*. When the user types *Dr* and presses <spacebar> or *Dr. And presses <spacebar>*, PCLaw expands the text. To prevent this from happening, de-select two Auto Expand checkboxes. If you use the code in a text field, you can press <Shift+Spacebar> to expand the code into the explanation text as defined in the list of explanation codes *Note that you can also select/de-select comma, period, semi colon, colon to expand a code.*

Default Timekeeper on Time Sheet

Specify a timekeeper to be the default timekeeper on a new time sheet. This is useful if a user enters time on behalf of a timekeeper. The timekeeper's initials can default at that user's workstation.

Remember Last Matter in Matter Manager

When you access Matter Manager, select this option so that the last matter that you viewed will be the default matter.
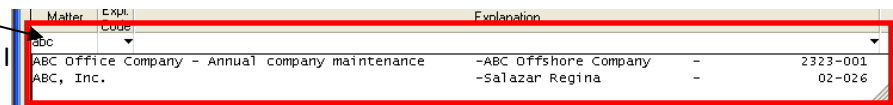
If you de-select this option, then you will have to select a matter each time you access Matter Manager.
It is common for users to exit Matter Manager and then need to access it again for the same matter. Selecting this option makes it easier since you don't always have to change the matter.

Auto Fill Matter from Description

If the Matter Descriptions are conformed for you to recognize the case name, consider checking this setting. Doing so allows you to just start typing in the matter description and you will get a "pick list" to select rather than double clicking or using <Ctrl F1> in the matter look up field.

Here I've started typing ABC for the matter description and I get a list to select my matter

Other TAB

Update Global Search Index from this Station

Only ONE workstation should have this option selected in the Workstation settings otherwise the program's speed can be compromised.

> Select on the bookkeeping station or the station on the server – as station where the computer is most likely to be "on".
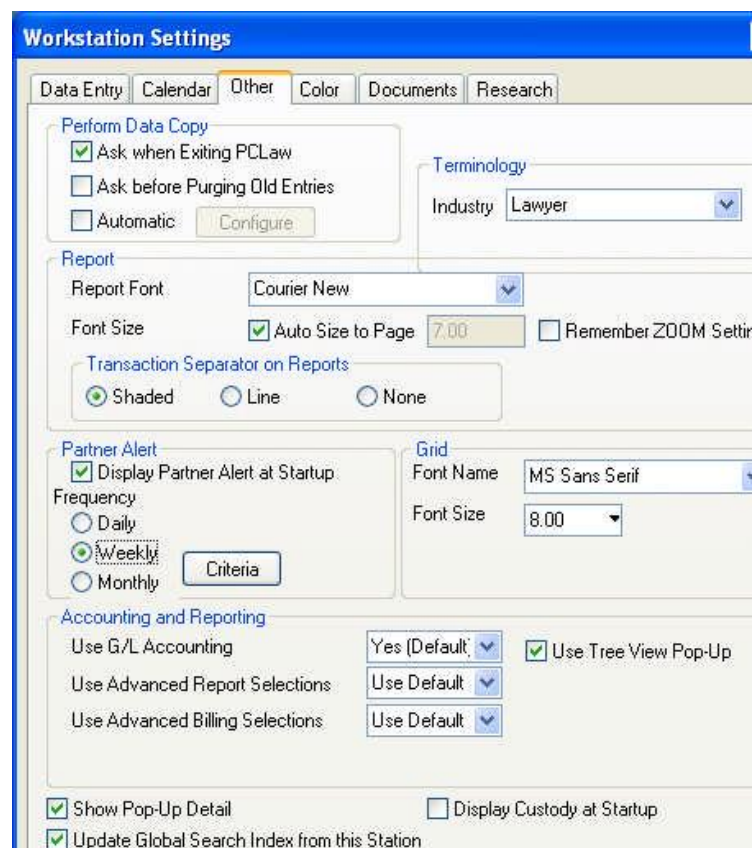
Registers

The PCLaw manual defines a Register as follows:

Register is a multi-purpose utility for viewing, modifying, and removing transactions in PCLaw. The available tabs correspond to the majority of source journals found in PCLaw. On each tab you can select which entries to list by selecting specific criteria. Use the filter button, available on some tabs, to reduce the list of items even further. Use the Print button to produce a report for your query.

A transaction summary area adapted for the specialized information is provided for each tab. Below it, a matter summary displays matter information for any selected transaction.

- Restore Columns to Default Settings
- Change Column Order
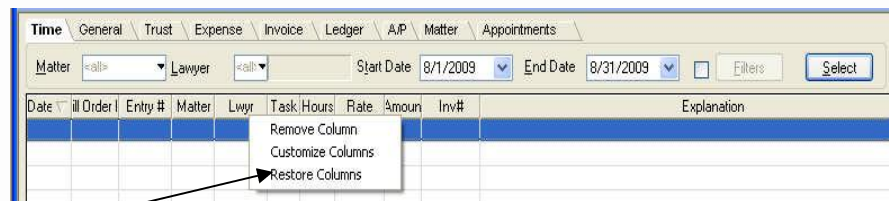- Sorting by Columns (Fields)

Restore Columns
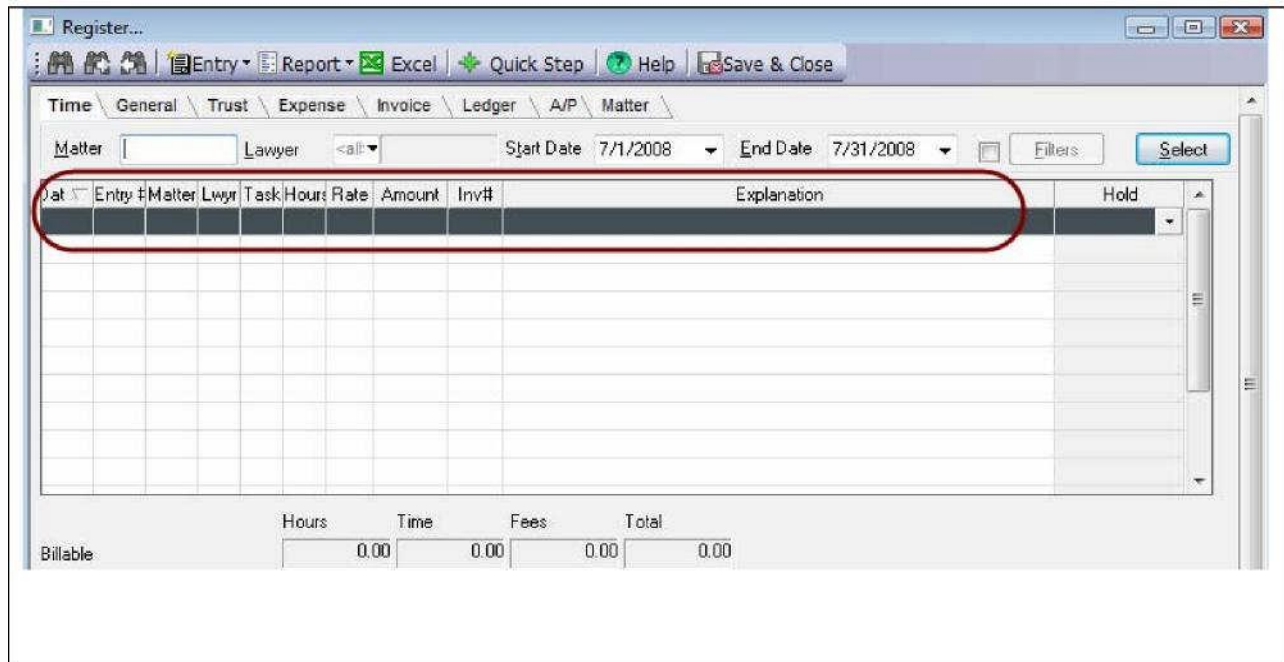
Notice how the columns are too narrow and overlap:

To Restore the columns to the original spacing:

Rest the mouse pointer over the column headings as shown and right-click.

Select **Restore Columns**

Change Column Order

In the 'header row', click and drag the column to a new position.

Note: change column order in other 'grid' windows

- Check allocation
- Bank reconciliation
- Deposit Slips

Change Sort Order

In the Register, you will notice that if you click on the **Date** heading, you will see a little triangle in the heading – this indicates that the register is now sorted by Date.
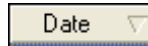
Click the **Date** heading again and the records are now in reverse order.
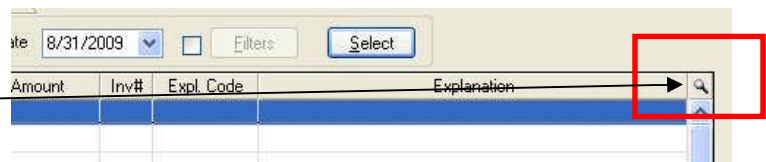
Click a heading to re-define the sort.

Note: change the sort order in

- Bank Reconciliation
- Deposit Slips

Searching the Register

In v9.2 and higher, the binocular icons are gone from the top of the register.

That has been replaced with a magnifying glass icon to the far right on the top bar.

Reports

Drill Down

In a report that is listed in the Reports Menu you can usually **drill down** by double-clicking on an amount to view another report or entry that gives further detail.

In some client based reports, if you drill down on a client name, re: line or matter you will access the Matter Manager. This is particularly useful if reviewing a List of Clients for basic information – you can run the report on the screen and then drill down to matter manager to edit as required.

Lawyer WIP Billing and Collection – drill down to billable time, fees billed, fees collected etc.

Refresh

Changes made when you have drilled-down appear if you Refresh the report on the window.

Reload

to view the last criteria for the report and run the report with minimal changes and effort.

Print Options:

All Pages

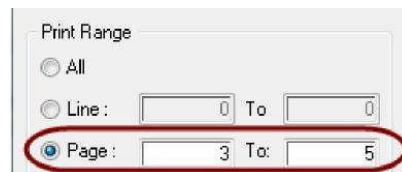Click the Printer button on the report toolbar to print all pages.

One Page or Range of Pages

Click the drop-down arrow on the Printer button on the report toolbar to print one page or a range of pages.

You can determine the page number in the Status Bar. The Status appears below the report in the window if you have Status Bar selected in the Options Menu.

Range of Lines

Tip: Look to the very bottom of the report on the Status Bar to determine the number of lines. The report will start at line 1 and when you scroll, the end line will increase. On screen, scroll to the starting point of where you want to print, note that start number, and then scroll down to the bottom of where you want to print.
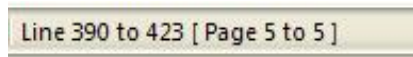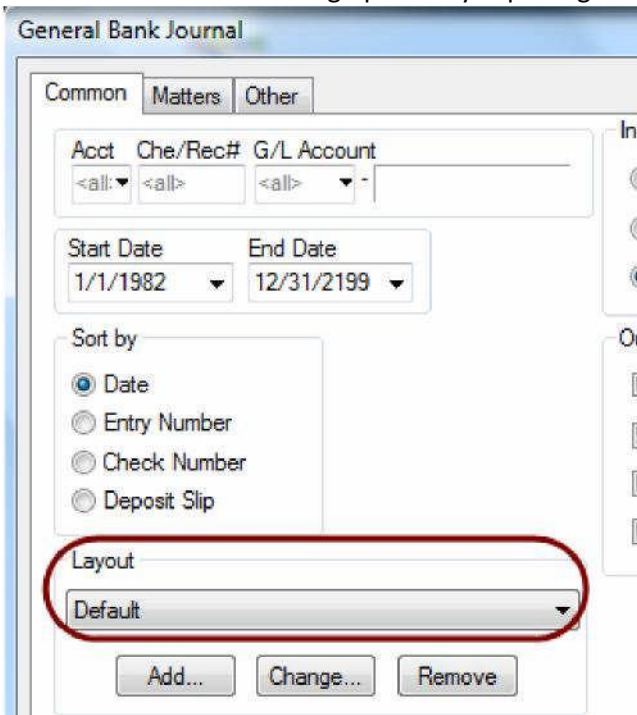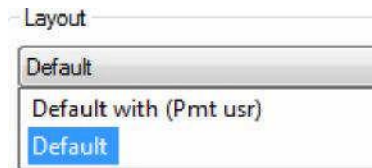
Report Layouts

Access additional formatting options by exploring the report tabs and in the layouts.

In the General and Trust Bank Journals for example, the drop down list in Layout will show

Select 'Default with (Pmt usr) will generate a bank journal showing the payment method for receipts and showing the PCLaw User who made the entry.

Use the Add/Change options to edit the Layout to change the report appearance including fonts, format and layout.

Summary Billing Report

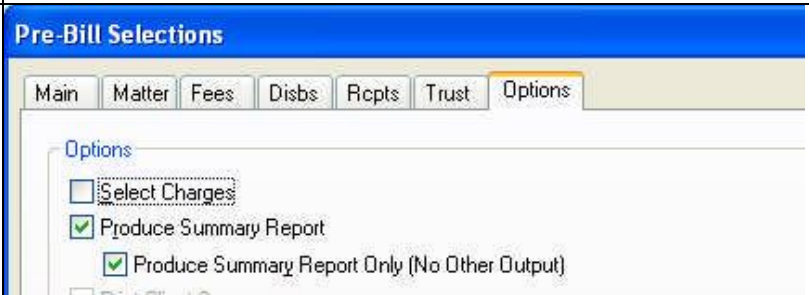You can determine matters to be billed by running one of the following reports:

- *Reports>Client>Work in Progress*
- *Reports>Client>WIP Summary by Responsible Lawyer*
- *Mass Pre-billing*

You can also generate a mass pre-billing and select to produce a Summary Report in addition to the printed pre-bills OR **only** the Summary Report.

To produce only the report and not the pre-bills, you must also de-select all options in the **Output** in the Main tab as follows:	**Pre-Bill Selections** Main Matter Fees Disbs Rcpts Trust Options Output Matter Client Lawyer □ Printer ☐ Screen Bill from Bill to Template □ Editor 1/1/1982 8/31/2009 □ E-mail Disk File □ PDF
In the Options tab, select as follow:	**Pre-Bill Selections** Main Matter Fees Disbs Rcpts Trust Options Options ☐ Select Charges ☑ Produce Summary Report ☑ Produce Summary Report Only (No Other Output)
The report lists the matter, responsible lwyr, client name and matter description, A/R balance carried forward, Fees to be billed, Disbs to be billed, Taxes if applicable, Retainers applied, and Net to be billed.	

```
                                           Pre-Billing Summary
Matter   Lwyr   Client                                Balance Fwd.      Fees      Disbs    Taxes  Retainers     Total
2323-001  RWK   ABC Offshore Compan ABC Office Company - Annual  3185.26   7600.00    848.47    0.00       0.00   11633.73
2318-001  JSF   Asbell, Ho, Klaus & Test matter for Engagement  10400.00   1200.00    176.16    0.00       0.00   11776.16
572-001   RWK   Atwell Johnathan   Company Maintenance           1000.00   3175.00    347.50    0.00       0.00    4522.50
2327-001  RWK   CFT                A/P Post and Hold invoices        0.00      0.00   1000.00    0.00       0.00    1000.00
2325-001  RWK   Fitzwilliam Stone F Sample matter for electroni    970.50      0.00     36.75    0.00       0.00    1007.25
100002    RWK   GEICO Insurance    Federal Bankruptcy            15009.25      0.00    203.85    0.00       0.00   15213.10
230-001   RWK   Hiller Sandra      State of Florida v. Hiller    14000.00   1050.00    134.40    0.00       0.00   15184.40
03-001    RWK   Legal-Tech Solution Melfa pending time entries     183.75 160185.00   3460.75    0.00       0.00  163829.50
2324-002  JSF   Naples Beach Hotel  Slip & Fall                   1660.00   1000.00   1106.00    0.00     200.00    3566.00
02-028    RWK   Tauescher Carl     State of Florida v. Carl Tu       0.00   1500.00     25.00    0.00       0.00    1525.00

Matters Pre-Billed:      10                                     46408.76 175710.00   7338.88    0.00     200.00  229257.64
Matters skipped:         28
See the Skipped Matter List, under the Billing menu for a list of matters skipped and the reasons they were skipped.
```

Skipped Matter List

You can review the Skipped Matter list IMMEDIATELY after your Pre Bill run by going to Billing > Skipped Matter List. This report will show which matters where skipped and the reasons of

- Insufficient Charges, or
- Billing Frequency, or
- Part of a Split Matter

System Settings

System Settings are the global defaults for PCLaw and are accessed by Options pull-down | System Settings.
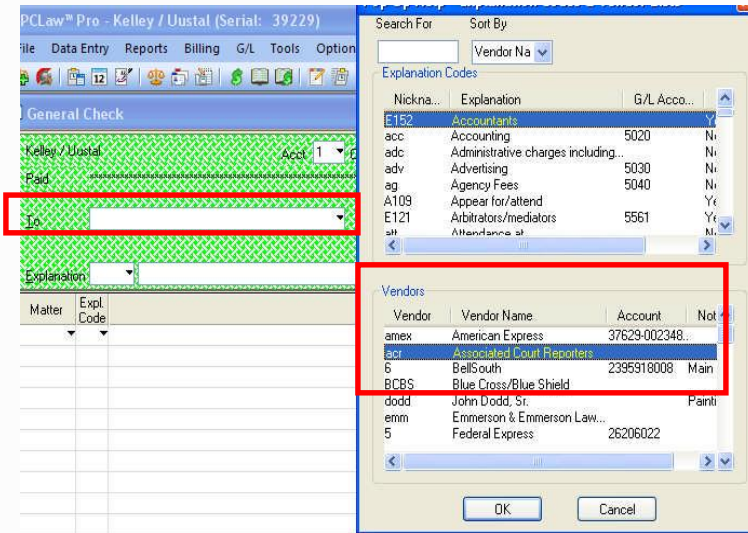
Other Tab

Show Vendors in Paid To Pop Up Help

Show Clients in Recvd From Pop Up Help

Both settings allow you to double click your mouse in the Paid To field for checks and the Recvd From field in Receipts to see a list of your Accounts Payable Vendors or Clients
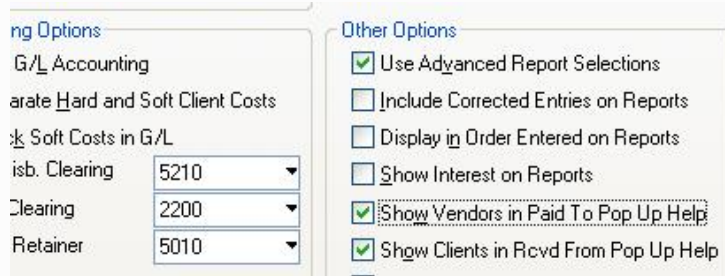
Double click in the TO field on a Check and you will see a Pop Up list of your Vendors.

Double click in the FROM field on a Receipt and you will see a Pop Up list of your Vendors.
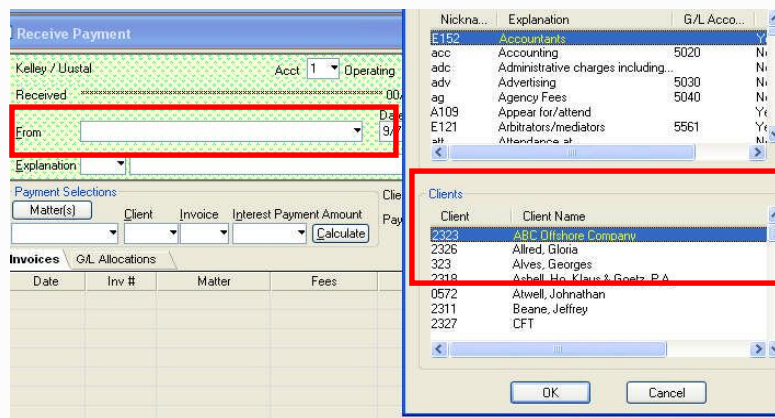
Data Entry Tab

Save Time in Hrs and Mins – NEW v10

Use Qty x Rate for Explanation Codes (e.g. photocopies)

By selecting Time in Hrs and Mins, the Time Sheet will show 15 minutes as 0:15 rather than .25
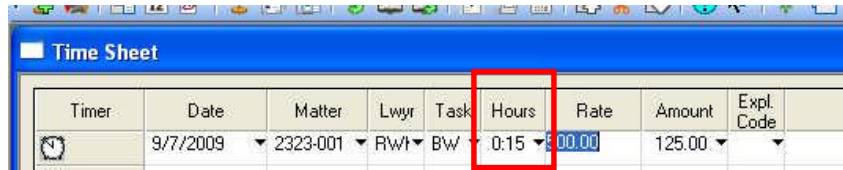
Reports will show time in hours and minutes too.
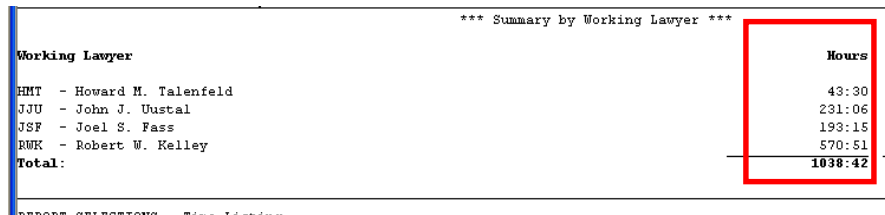
To use the Qty x Rate for an Exp. Code, edit the Code by accessing the list at Options | Lists | Explanation Codes.

Select the checkbox at the bottom left and set the multiplier rate.

In our example, I have setup a $.25 charge per photocopy for the Exp. Code PH.
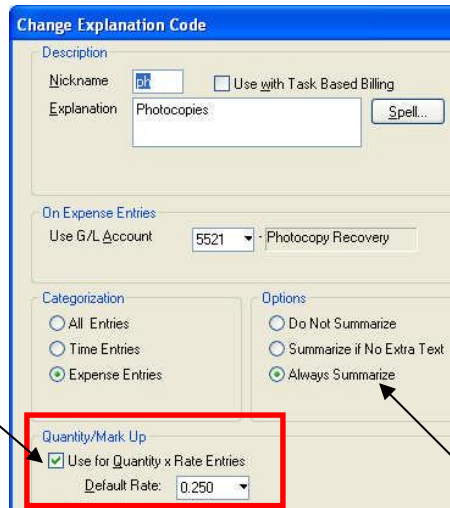
When using the Expl. Code PH on a Check or Expense Recovery, a Quantity Calculation box will "pop up".

Enter in the Quantity and PCLaw will calculate the Amount based upon the set rate. Click OK to save the amount.
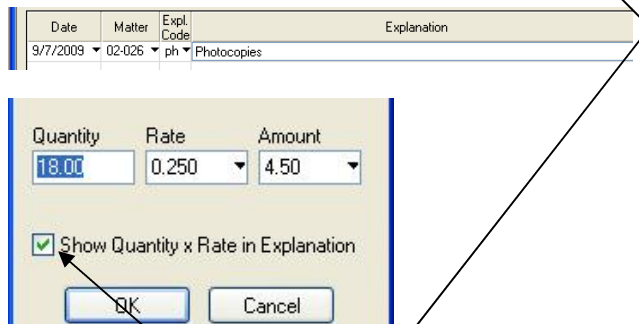
NOTE: By leaving the checkbox, you will see the detail on reports. If the Exp. Code is set to Always Summarize, the Bill will show a total of all Photocopies.

System Settings

Banking Tab

Save Entries on Print

This setting will save the Check when you click Print – the same as clicking the OK button on the data entry screen.   This is an excellent Best Practices setting to ensure that the accuracy and integrity of the original entry is saved. If the user changes that entry, it will original and modified or deleted entry will appear when selecting the Include Corrected Entry option for the report.
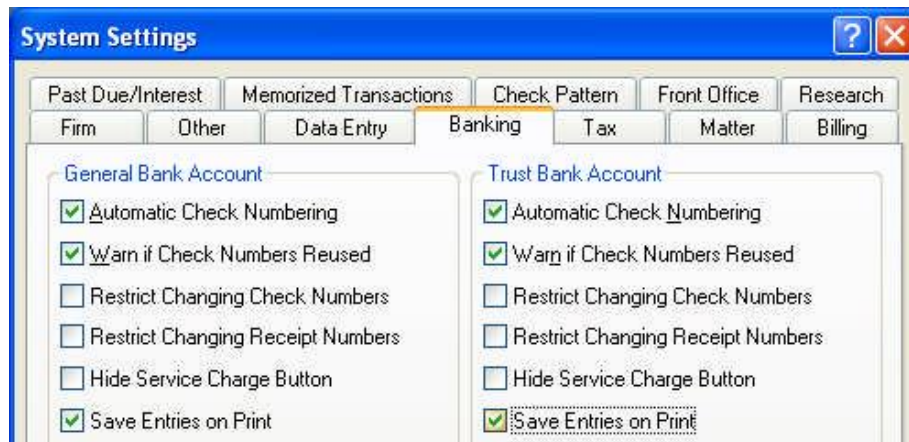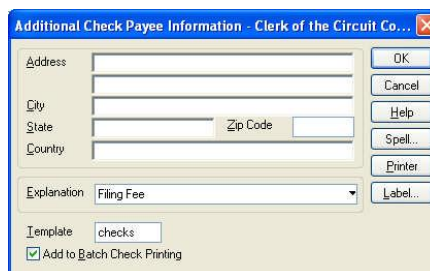

Batch Check Printing

This is a useful setting if you share a printer or do not have a dedicated printer for checks.

When you click the PRINT button on a check screen, the Add to Batch Check Printing box is checked.   When you click OK, the check is added to the batch

Printing checks in a batch

Batch Checks are accessible under the File pull-down menu | Batch Check Printing. Select the Operating or Trust Account and click OK.

Your checks will appear in a list. Select the checks to print so there is a checkmark on the left side, confirm the First Check Number and click Process.
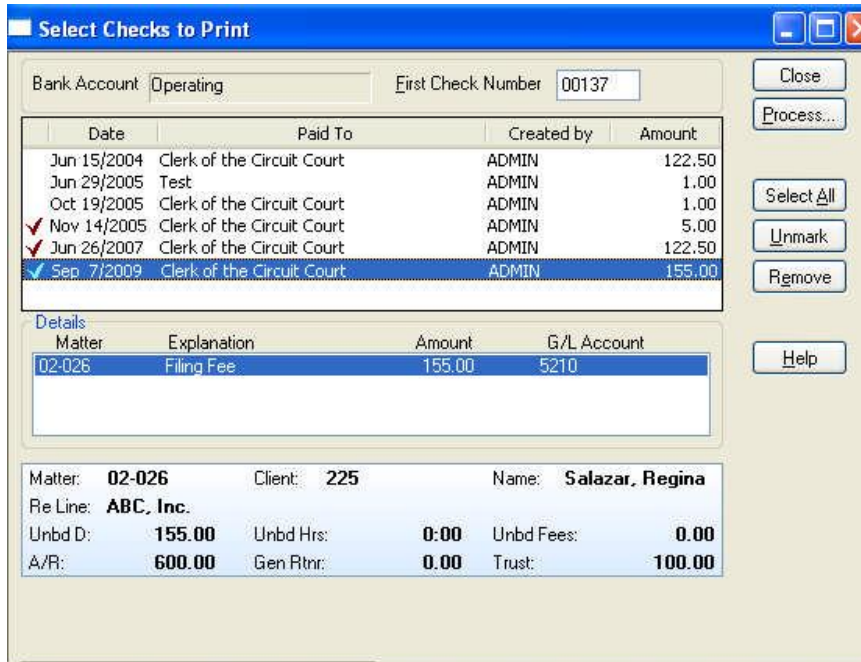
System Settings
Matter Tab - New Matter Settings

Select the NEW MATTER SETTINGS button at the bottom left of the tab to default certain fields to appear on the NEW Matter Screen. Adding these fields to the NEW Matter function will allow the user to complete this information in one step rather than using the Matter Manager function to supplement the case information.

Add fields over to the right to default on the NEW Matter screen. In my example, I added the Billing Address, Second Billing Address, Bill Setting Format and Referred By fields. Click OK to save the settings.
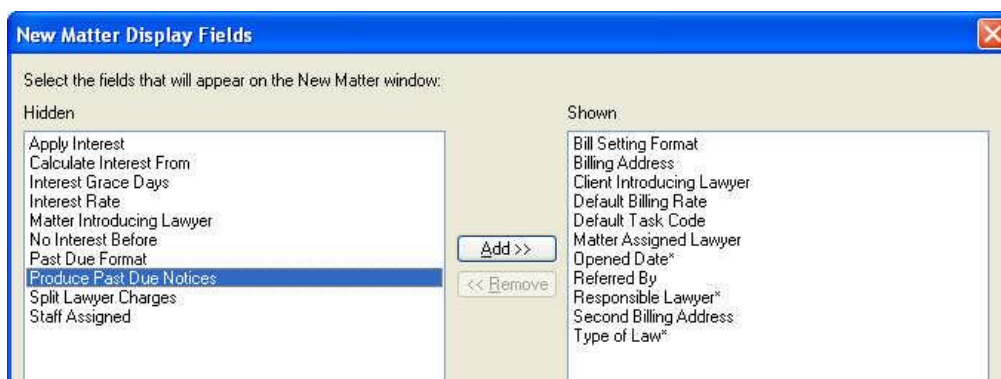
System Settings

Billing Tab

Billing Output to PDF

- Creates a PDF copy of each invoice
- PDF images are stored in the same location as other invoice images
- Can be changed in System Settings

For Document Manager Users

- PDF copies of each invoice can be saved and logged on a matter basis
- Select **Save PDF Files to Document Manager**
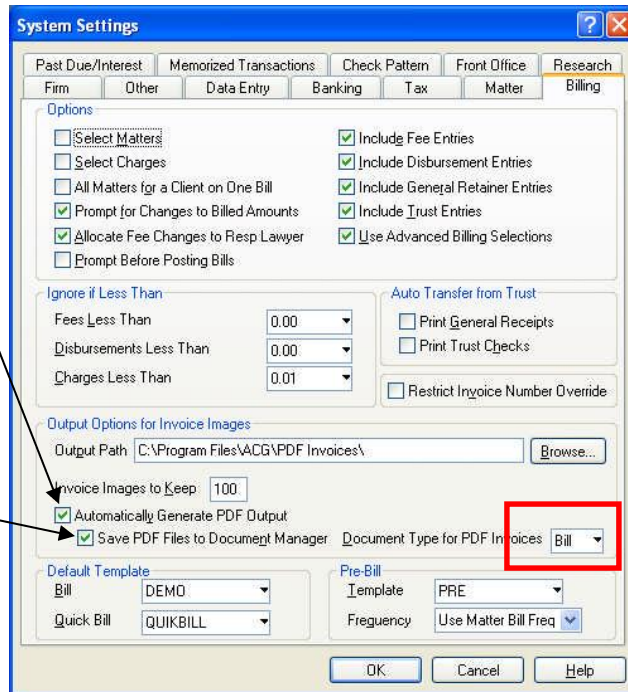
When Save PDF Files to Document Manager is selected, the Bills are available in the Matter Manager > Document tab.

System Settings

Memorized Transactions Tab

Edit Payee

The Memorized Transactions tab sets fields to memorize from previous transactions. After the first three characters are typed in the To or From boxes of general checks, general receipts, trust checks, trust receipts, or accounts payables, the fields selected on this tab are filled automatically.

Occasionally someone will misspell the Payee on a check, that mistake gets memorized and now you have to edit it each time you create a check.

You can edit the Payee list for both General and Trust checks. Click the General or Trust buttons under Edit Payee to pull up a list of Memorized Payees. You can change a Payee or remove duplicates. Deleting an entry will not affect previous checks written to this Payee.
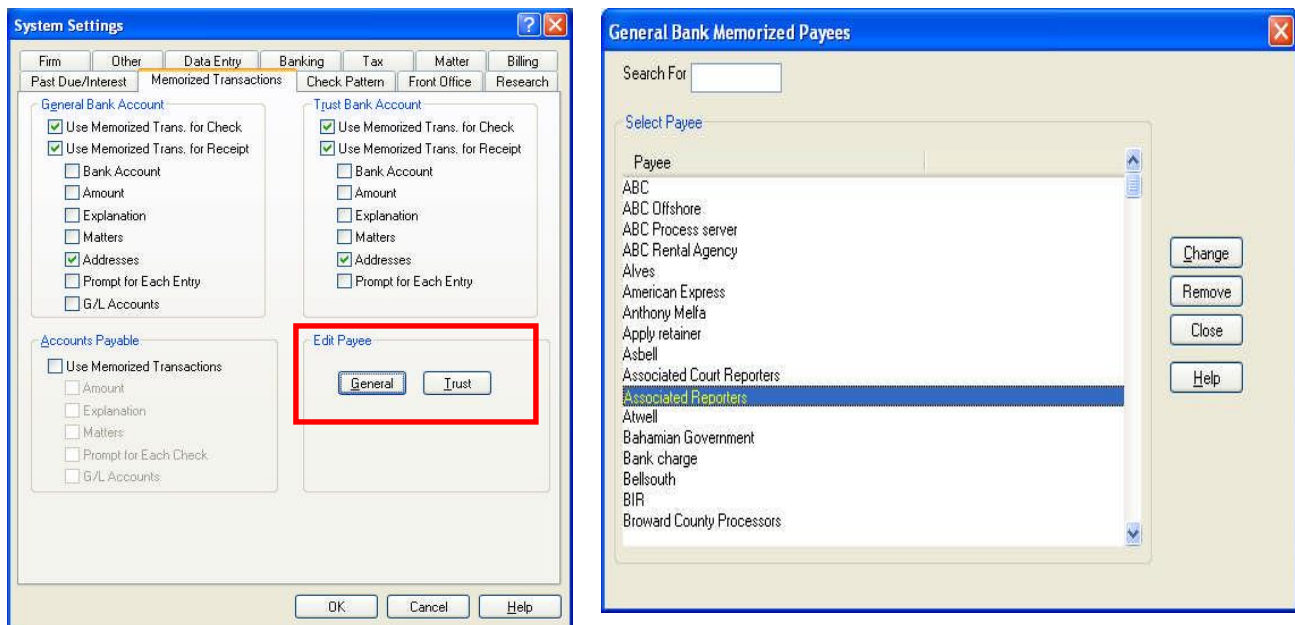
Viewing Time on the Calendar

Viewing time on the PCLaw Calendar is a useful, timesaving tool to get a snapshot of the total time entered for a user without having to run a report. Additionally, you can double click on a day and drill down to the entry details. This is a great function for anyone who has the responsibility to monitor time entry by firm members or perhaps a partner who has no desire to learn or access report settings.

To use this feature, the PCLaw Calendar must be enabled in System Settings and enabled for each timekeeper under Options | Lists | Lawyers and Rates.

Notice there is also an optional Daily Goal. If the Timekeeper falls below the daily goal, the days below the goal will appear as red on the calendar.

If the daily goal is not set, red days indicate no time has been entered.

If an Event Color is chosen, days meeting or exceeding the daily goal will appear in that color.
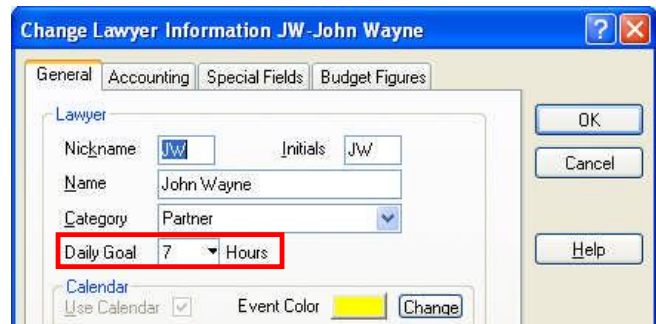
Select the timekeeper, select the month and click the Refresh button. If the Lawyer field is blank, the view and totals represent all timekeepers.

You can double click on a day to bring up the Time Register in Change mode to edit or print entries. If an entry has already been billed, you are warned that you cannot edit the entry. Security profiles dictate whether a user will be able to view or double click and edit entries. To view entries, make sure the user has the Register function and Time Listing Report in their security setup.
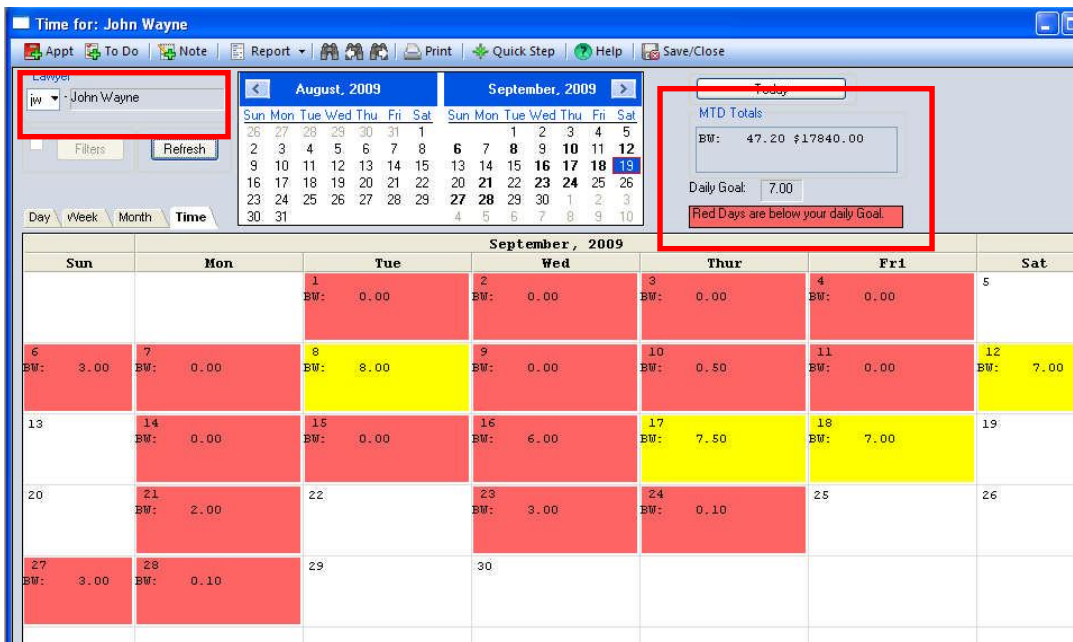
Matter Manager

Summary Tab – This is your friend!!!!

The Summary Tab in Matter Manager provides users with key balance and date information. Users will see balances for Unbilled Hours, Unbilled Fees, Unbilled Disb., A/R and Trust. Users can click on one of these totals to drill down to the Register providing the detailed entries.   Security rights will dictate a user's access to view the balances or edit the entries in the Register.

Clicking on the Unbd Fees button will drill down and show the Register:

Matter Manager

Summary Tab – Client Totals

The Summary Tab in Matter Manager will also give you a client's totals across all matters. The Client Totals button is located at the top right.

You will have the option for Totals for the Client or toggle the view for any matter. Key information is available without having to run report!
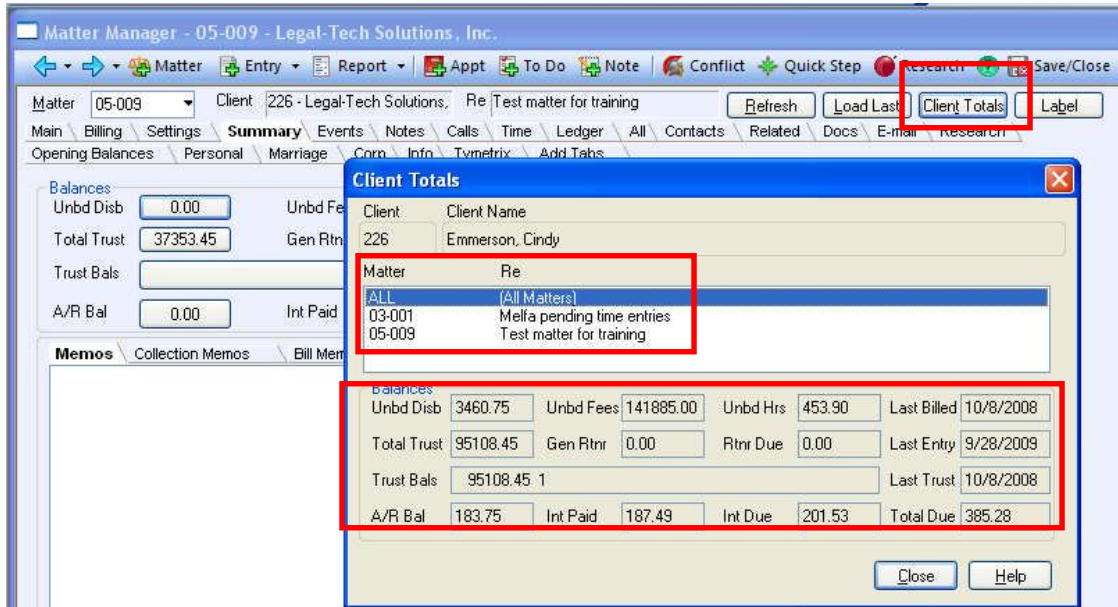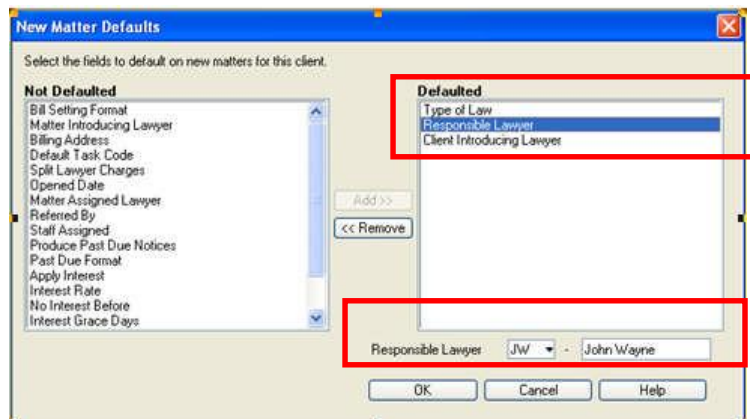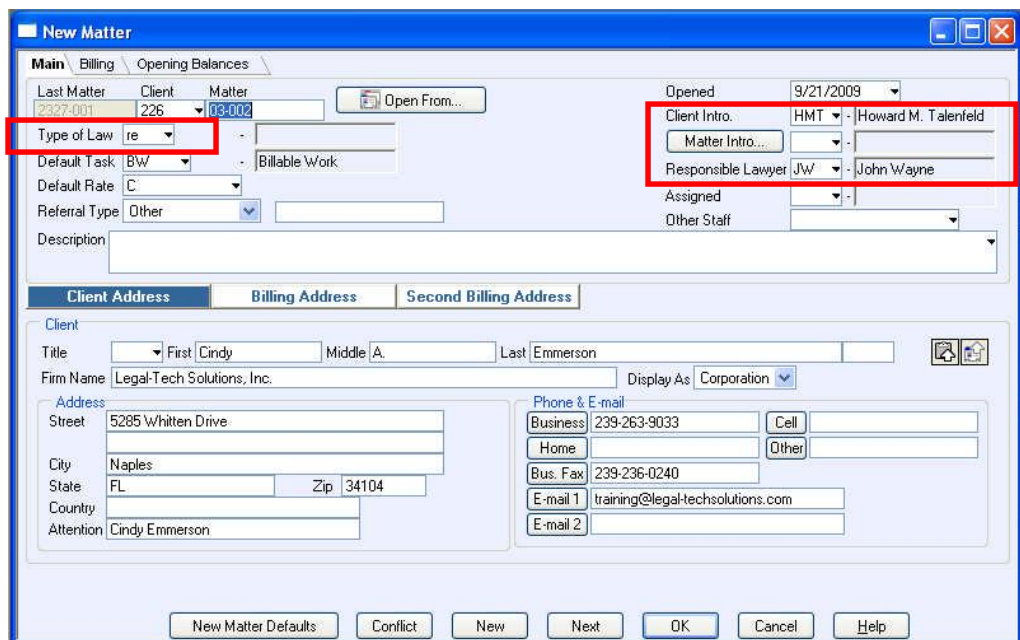
Matter Manager

New Matter Defaults

This feature allows you to set a client's new matter defaults. Sometimes a key client will have settings that are different than other clients (e.g. Assigned Lawyer, Billing Address, Task Code, etc.).   By using this setting, you can set that information for future matters.

To access the settings, you must be in Matter Manager on one of the client's matters. Go to the Settings tab and then New Matter Defaults.   Add fields over to the right and then complete the defaulted information.

Now the next new matter for that client will inherit this information.

Matter Manager

Rate Exceptions

Rate Exceptions are new to PCLaw v10 and are located on the Billing Tab in Matter Manager.   The hourly rate exceptions for timekeepers are now defined here rather than at the Split Lawyer Charges function. Exceptions give the firm options to override billing rates for timekeepers, task codes and disbursements.

Firms who practice insurance defense billing now have the option to define different hourly and disbursement rates. For instance, the standard photocopy charge is $.25 per copy but one client will only allow $.10 per copy. That rate exception can now be set in Matter Manager.

In our example, one timekeeper charges a different hourly rate for the task code Travel, another timekeeper charges $500.00 per hour regardless of the task code, and the client will only allow $.10 per copy.   Note, if the exception applies to all timekeepers for a specific task code (e.g. Travel), leave the Lawyer field blank.
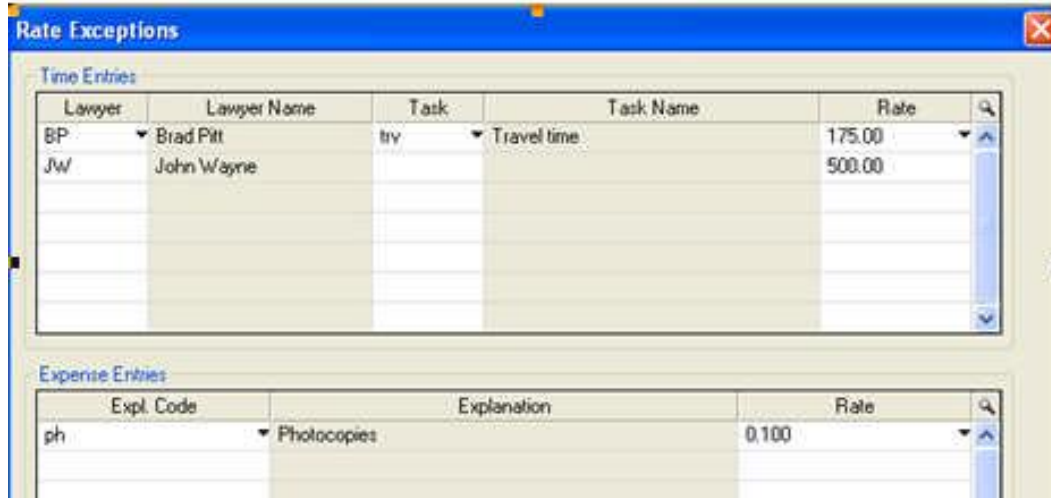

To utilize the Expense Rate Exception function, enable the "Use Quantity x Rate Entries" in System Settings, Data Entry tab, AND on the Exp. Code itself (Options > Lists > Exp. Codes).

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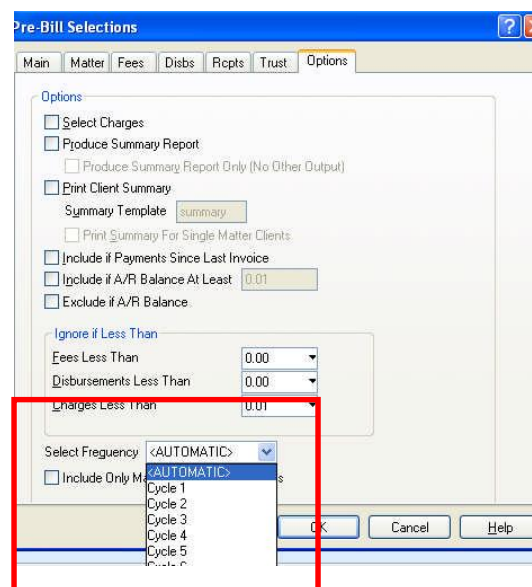
Matter Manager

Billing Cycles 1-6

Billing cycles define the frequency in which the matter is eligible for a pre-bill or bill (under mass pre-billing or billing).   The options are Include, Exclude, Monthly, Quarterly, Semi-Annually, and Annually. However, there are six additional frequencies Cycles 1 – 6.   These are "Firm defined" and another tool to segregate your matters (e.g. Contingent matters or Flat Fee matters).   Cycles 1 – 6 are useful alternative because you cannot run mass Pre-Bills on Excluded matters.
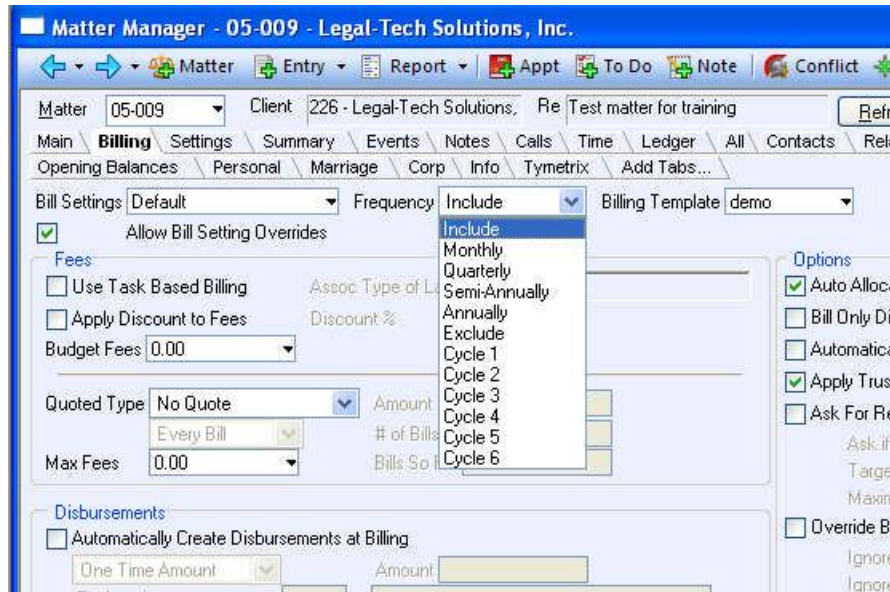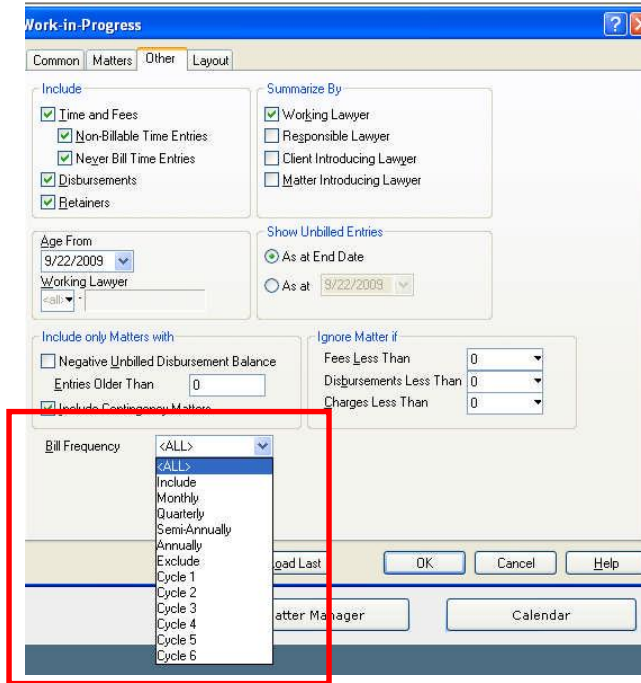

When it is time to run Pre-Bills for any group of matters in Cycle 1 – 6, go to the Options tab and select the Frequency at the bottom.

Matter Manager

Billing Cycles 1-6

When running the Client WIP report, you can select segregate the matters by Billing Frequency by going to the Other tab.

Deposit Slip Module

The Deposit Slip Module is a timesaving tool that allows the firm to print their daily receipts for any bank account onto an actual deposit slip laser form.   The forms are an industry standard available from LN Forms or most forms suppliers.

Even if your firm will not use the actual form, you should still consider using this module.   There are two immediate benefits:

- Used on a daily basis, the accuracy of the data entry is immediately confirmed rather than waiting until bank reconciliation;
- Gives a deposit slip total at bank reconciliation – no more pulling out the calculator for adding up the individual receipts!

Go to the Tools pull-down menu | Deposit Slips to access the module.
- Select the bank account and date range
- Select the receipts to be included on the deposit total and confirm the total at the bottom
- Confirm or change the print/deposit date, click Print to the Printer and then OK to save.
- If you aren't using the laser form, print it on paper and use the DEPSLIP template but if you are using the form, set the DEPTCKT ticket in System Settings |Banking tab
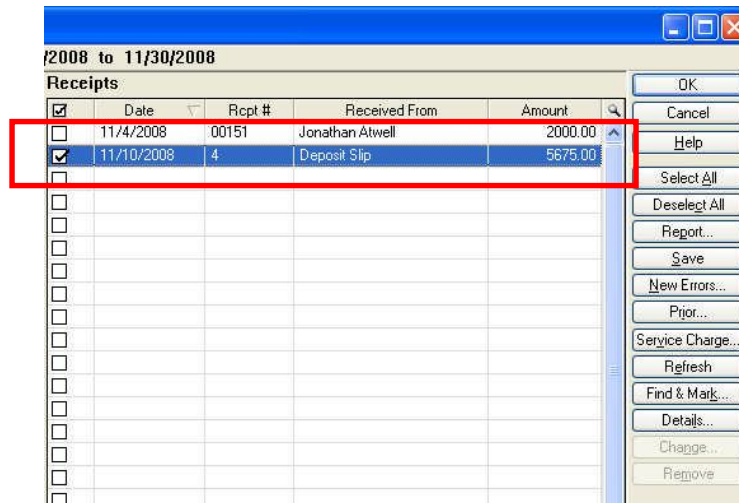
Deposit Slip

For bank reconciliation, select the checkbox to "Use Deposit Slips".
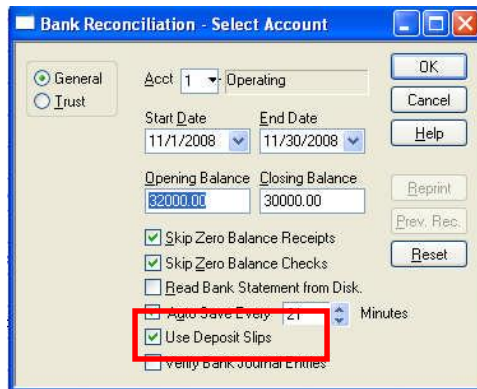
The Receipts section of the bank reconciliation module now shows the deposit total.

TIP: You can reprint or edit a Deposit Slip. Perhaps the printed date is wrong or the printed copy has been misplaced. When you are at Tools | Deposit Slips, there is a Change button and Reprint option. The key is to select the date range that will include the original slip.

Billing Fees Journal Report

The Billing (Fees) Journal is the source accounts receivable report by which other A/R reports retrieve information. The journal lists invoices created through billing and matter opening balance. Write-downs and payments affect the current amount outstanding for each invoice. Invoices are detailed by fee credit lawyer.

One the biggest benefit is that this report will break out the Accounts Receivable into Fees and Costs. Fees and Costs are not broken out on the A/R by Client report.

Here is a Receivables Report for a matter. The total A/R is 9,832.12. Looking at this balance will not tell you how much is owed to the firm for costs.

Here is a Billing Fees Journal report for the same matter with the "Include Paid Invoices" box unchecked. More information is given about each timekeeper's billed hours and fees and costs billed.

Billing Fees Journal Report

Scroll down to the Firm Summary section of the report to review the Fees and Costs breakdown for the total Accounts Receivable. Note, the split between Hard and Soft Costs are shown here because that setting is enabled in System Settings.

```
                                        *** Firm Summary ***
                                 |                             Outstanding                          |
             Billed        Paid  |  <30 Days  31-60 Days  61-90 Days  91-120 Days   >120 Days      Total   % Firm
Fees      12320.00     3000.00        0.00        0.00        0.00        0.00      9320.00      9320.00   100.00
Soft         22.12        0.00        0.00        0.00        0.00        0.00        22.12        22.12   100.00
Hard        490.00        0.00        0.00        0.00        0.00        0.00       490.00       490.00   100.00
Tax           0.00        0.00        0.00        0.00        0.00        0.00         0.00         0.00   100.00
Total     12832.12     3000.00        0.00        0.00        0.00        0.00      9832.12      9832.12   100.00
```

Bank Reconciliation Best Practices

The following should be considered when developing firm policy and utilizing the tools and settings provided in PCLaw.

- 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 the Template format to show User name
- Enable the System Setting "Save Entries on Print" located on the Banking tab
- 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