What's New in Lexis® Back Office powered by PCLaw™ 9.0

Important Notices

August 2007

Before You Download Lexis® Back Office powered by PCLaw™ 9.0

- Before you download and install version 9.0, review the following checklist:
  - ☑ I have done a **FULL** backup my PCLaw data files and documents.
  - ☑ I have a new version 9 product key.

Bank Reconciliation

- Check out our new Bank Reconciliation! The new view displays checks and receipts in an easy-to-view split screen.
- The balances area is reorganized to group items the way you work.
- There is a new **Service Charge** button within the bank reconciliation to save time when making these entries. The check is created with a check number SC.
- A new **Reprint** button is available on the initial Bank Reconciliation screen when previous reconciliations exist. Reconciliations for dates prior to summarization are not available.

Reporting Features

- On the Common tab of all customizable reports, an enhanced filter feature is added. Click **Adv. Search** to see all the ways you can improve your report results.
- To help you reconcile your firm's cash flow, two new reports are available in PCLaw; **General Bank Missing Checks** and **Trust Bank Missing Checks**.
- The **Payment Method** token is added to the Client Ledger report.
- A new layout drop-down list is added to the report toolbar. You can now select a different layout and refresh the report automatically without leaving the screen display.
- Sending a report to Microsoft® Excel® now automatically opens the spreadsheet.
- The Payment Allocation Listing report now includes the **Client Check #** token.
- On the Other tab of both General Bank and Trust Bank Journals, new options allow you to filter your results. **Include Void/NSF Items Only**, **Show Only Amount Over**, and **Include Negative Amount** allow you to specify exactly which entries you want to display.
- Select which entries you want to include on the Work-in-Progress report. Filter out non-billable task code type and the Never Bill hold option by selecting the check boxes whether to include **Non-Billable Time Entries** and/or **Never Bill Time Entries**. You can also select a specific **Bill Frequency** to further restrict the entries displayed.
- PCLaw gives you better Audit Trail capabilities with two new tokens available in the report layout; add **Entry Date Changed** and **Entry Date Entered** to your layout to track the user modifications.

Billing

- **BillFlow Manager** is the latest major feature of Lexis® Back Office powered by PCLaw™! With the BillFlow Manager, you can now save a collection of matters that you bill together into a BillFlow.

  Using this feature, found from the **Billing** menu, you can review a collection of invoices (called a BillFlow), assign a specific timekeeper to individual matters or the entire collection, and even adjust charges on the matters while keeping the invoice in a review stage.

  With the available tabs in the BillFlow Manager, you can see at a glance which matters are excluded, whether because of insufficient charges or another advanced filter.

  For detailed documentation on using this feature, consult the Lexis® Back Office Knowledge Base or contact Technical Support.
- When sending bills to your clients via email, the matter description is added to the subject line.
- On the Pre-Bill, Bill, Quick Bill, and Request Bill features, a new memo area is added allowing you to make additional notes to be displayed on the bill. Memos entered in the Matter Manager are displayed on the bill if you don't specify notes on the bill screens. New tokens are available for these new memos areas to be added to your templates.

Quick Step

- You can now launch another application from within PCLaw. Add a new Quick Step button **Application Launcher** and specify the program you want to add.
- For prior versions of PCLaw, the correct features you have available from the main menu are now available to add directly on your Quick Step.

Register

- On the General and Trust tabs of the Register, you can now add **Client Chk #** as a column.

Practice Management

Calendar and Phone Calls

- View more detail with a new larger memo area on all phone events.
- On the Phone Call Manager, select how often you want to refresh your view of events. On the Calendar tab of Options > Workstation Settings, select the check box and **Refresh Automatically Every XX Minutes** and specify the number of minutes between refreshes. You must close PCLaw and re-open for these settings to take effect.
- On an appointment, you can now see the matter description. The description is also available on the Appointment Listing and Appointment Schedule.
- You can now mark TO Do's as completed without having to specify a **Completed Date**. On the Calendar tab of Options > Workstation Settings, clear the check box **Prompt for Completion Date,** if desired.
- From the Time tab on the Calendar, you can now print in the same colors you see on screen, if your printer is capable of printing in color.

Matter Manager

- On the Summary tab of Matter Manager, two new tabs are available, **Bill Memos** and **Pre-Bill Memos**, to automate notes to print on the bills.
- On the Related tab, two check boxes are available to **Include Inactive Matters** and **Include Archived Matters** for the specified matter.
- Now you can **Print** from the All tab!
- Custom tab associations, by matter or client, are now displayed so you know where to change your preferences at a glance.
- For salutations, the **Title** box is now a drop-down list.
- The Initial box is now called **Middle** to accommodate a full middle name.

Data Entry

Banking

- The bank account name is expanded to hold 80 characters. However, the associated General Ledger account retains only the first 20 characters of the bank account name. You may need to adjust reports that have customized layout if you require the full bank account name displayed.

General

- Spell-checking is enhanced with the new Spelling area added to the Data Entry tab of Options > Workstation Settings. Click **Customize** to set your preferences on each workstation. Click **Dictionaries** to see the choices for misspelled words.
- You can now make specific boxes on a time entry mandatory. You can now choose **Required** from the drop-down list of options in the Field Settings area of a user's security settings. From the Options > Administrator > Security window, highlight the user, click the Advanced button, and then Time/Fees.

Receipts

- You can now receive payments by credit card directly into Lexis® Back Office. Contact the service provider to create your account.
- Select **Credit Card** from the Payment Method drop-down list to initiate the process. Configurations are made on the Banking tab of Options > System Settings. Account settings are specified in Options > Lists > Bank Accounts.

Canadian Clients

- Direct access to Lexis news feeds and rulings is now even easier with direct links to the most commonly used features already added to the new **Research** Quick Step group tab. QuickLaw and in-depth navigation on certain web sites may require a subscription. Contact your Lexis sales representative for more details.

Template Editor

- The Template Editor has a new look for the toolbar to help you find what you need.
- By default, the option to view all tokens, shapes, and graphics is selected.
- On the template type Deposit Slip, **Deposit Type** and **Client Che #** tokens are now available in the Receipts section. In the Miscellaneous section, **Total Deposit (Words)** and **Bank Name** are now available.
- On the Receipts template type, you can now add **Client Che #** to your template.
- On Label template, you can add the Country for the client and billing address, opposing lawyers and opposing party. Additionally, the matter introducing lawyer and initials are available to be added.
- On Past Due templates, **Attention** uses the the Client Attention or Billing Attention box from Matter Manager based on the address you specify to use for bills.
- On Billing templates, billing address tokens are added in the Miscellaneous section, as well as, **Client Check #** in the Payments section. In the Conditional section, you can find over 10 new interest tokens.

Productivity Features

- Using the feature Lawyer Overview, you can now select multiple lawyers. However, in order to use the drill-down capability, only one lawyer can be selected at a time.
- You can now perform administrative features or switch users without being required to exit and re-login to PCLaw. Save time and select **ReLogin** from the File menu to specify the new username and password.