

Timeslips® Data Conversion Information Sheet

DOS version and windows version 9 and above

What Gets Converted

Your existing data can be automatically converted to PCLaw to make the transition between systems much easier. Client names and addresses, accounts receivable balances, detailed work in process, trust funds, vendors, contacts and calendar entries can be converted into PCLaw without data entry on your part.

This conversion process is built into PCLaw and can be done in your own office. In order to perform a Timeslips conversion you must check the box for Import Utilities during the installation process.

Client Information:

All Client names, addresses etc. will be converted.

During the conversion process, you can tell the program which Timeslips nickname to use as your PCLaw matter number and what field from Timeslips to use as the PCLaw client name for sorting purposes.

Depending on the version of Timeslips you are using, you may or may not have the same address fields as PCLaw. If not, the conversion program will fit the address into the PCLaw fields as best it can. Although the addresses may not appear correctly in the open matter screen, they should print properly on client bills.

Accounts Receivable

Billed items from Timeslips are imported into PCLaw by creating one invoice for each invoice in the Timeslips history file. That consists of the total billed time, billed expenses, taxes, and payments.

If you have changed the A/R balances in the Client Information screen of Timeslips and Matter History has been deleted, PCLaw will adjust the fees on the invoice to account for the difference. PCLaw assumes the amounts on the Client Information screen are correct.

The last bill date from Timeslips is used for the invoice date.

Example:

In Timeslips, the Matter History shows that A/R consists of \$1000 in fees, \$200 in expenses, and \$60 in taxes, totalling \$1260. The Client Information window shows A/R of \$1160.

A PCLaw invoice will be created totalling \$1160 - consisting of \$900 in fees, \$200 in expenses, and \$60 in taxes. The adjustment is made to the fee amount.

Interest

Interest from Timeslips Version 9, or above, is converted to PCLaw. PCLaw adds the interest amount to the fee amount.

For example, the interest owing is \$50, the PCLaw invoice from the example above would show fees of \$950 instead of \$900.

There is the potential for PCLaw to charge overdue interest on accumulated interest from Timeslips. To prevent this from happening in PCLaw, use the **Change Bill** function to remove the interest from the bill. Then, assign an interest rate to the bill using the **Change Interest on Invoices** function.

Credit Balances

Credit balances, resulting from negative A/R balances in Timeslips, are converted differently. Instead of creating an invoice with a negative balance, PCLaw creates a General Retainer.

A general retainer represents funds received from a client that should be used to reduce the balance of an invoice created in the future. Retainers are applied to newly created invoices only.

Work-in-Progress

Detailed work-in-progress is brought into PCLaw in the form of time entries and client expense entries.

Client expense entries dated after the PCLaw startup date are posted to General Ledger account 9999 - Suspense.

You can reallocate these expense entries in PCLaw by creating general journal entries.

Client Funds

If you choose to convert them, Client Funds from Timeslips become the trust funds for PCLaw matters.

In PCLaw, you will see each trust check and receipt on the Client Ledger and on the Trust Bank Journal.

GENERAL INFORMATION

General Ledger

Timeslips does not have General Ledger Information. We will provide the PCLaw standard chart of accounts. The balances of your general ledger accounts can be entered into PCLaw as a single entry.

Action Required After Conversion: To enter these balances you simply go into the PCLaw data entry option called G/L Opening Balances and type each G/L account and its corresponding balance from the Trial Balance report on your current system.

Timing

The best time to do your conversion is at the end of a month. PCLaw must start your general ledger as of the first day of a month. We recommend that you enter ALL data for the current month into your old system, not enter any information for the next month, and perform your conversion.

If you choose not to perform the conversion at the end of a month, client disbursements you have entered for the next month will be posted to suspense in the general ledger. This will require a journal entry at month end to reallocate these expenses and you will have to make adjustments for non-client related accounting done during the current month, which will not be converted.

When to get your PCLaw software

You should arrange with our Sales Department to get the appropriate software for your firm. It is important that you order a version of PCLawPro/PCLaw that will accommodate all the active timekeepers you have in your existing system. We recommend that you obtain the software at least one month in advance of the scheduled conversion date, to allow your staff to go through the tutorial and learn how to use PCLaw so that you will be ready to go when you receive your converted data. **DO NOT enter any real data into PCLaw during this period.** When you convert the data, it will be a complete PCLaw data set, and any existing data will be overwritten.

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Timeslips® Conversion requirements

Please fill out this two-page form and return it along with your data. Please include a copy of your firm's letterhead for correct spelling of you firm name, address, etc.

Firm Name: _____

Contact Person at your firm: _____ Tel: _____

System Startup Date (must be the first day of a month): _____

NOTE: No data can be entered into PCLaw prior to this date and no data should be entered into your existing system after this date.

Type of Firm:	<input type="checkbox"/> Sole Practitioner	<input type="checkbox"/> Partnership	<input type="checkbox"/> Corporation
Type of Accounting:	<input type="checkbox"/> Cash	<input type="checkbox"/> Modified Cash	<input type="checkbox"/> Accrual
Convert Inactive Clients:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Include Closed Clients:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Convert Client Funds To:	<input type="checkbox"/> Trust	<input type="checkbox"/> Retainer	
Convert Activity as Task:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Get Matter Nickname from:	<input type="checkbox"/> Nickname 1	<input type="checkbox"/> Nickname 2	
Get Client Name from:	<input type="checkbox"/> Nickname 1	<input type="checkbox"/> Nickname 2	<input type="checkbox"/> Name

Information collected from Custom Fields

Matter Open Date	(Default = 19920101)	_____
Type of Law	(Default = misc)	_____
Responsible Lawyer	(Default = Default timekeeper)	_____
Assigned Lawyer	(Default = Default timekeeper)	_____
Introducing Lawyer	(Default = None)	_____

Default timekeeper _____

I have read the above conversion specifications and I hereby authorize you to perform the conversion of our data. I acknowledge that payment for this data conversion is not covered by LexisNexis - PCLaw's 60-day money back policy, and is 100% non-refundable.

Name (please print)

Signature

Lawyers / Timekeepers

In PCLaw, the number of active timekeepers should not exceed the license you purchase. However, you can have inactive timekeepers that do not count toward the total number of timekeepers. Inactive timekeepers will show up on reports and allow you to collect fees on outstanding invoices, but no new entries can be made to an inactive timekeeper.

On the chart below, please list all timekeepers that you would like to have brought into your PCLaw system as either active or inactive. Timekeepers that are in your current system and are not listed below will be lumped together into a timekeeper called “Inactive Timekeepers”.

Generally, people for whom there are still have outstanding collections, or you want to have then shown individually on reports should be listed. People who have been gone so long, and their information is no longer relevant may be omitted.

ID in current system	Timekeeper Name	ID in PCLaw	Partner (✓)	Inactive (✓)