What's New in PCLaw Version 8.20

Before You Download This Version of PCLaw - Important Notices

- Before you download and install PCLaw™ version 8.20, review the following checklist:
  - ☑ I have done a **FULL SYSTEM** backup of my computer and have a backup of my PCLaw data files and documents.
  - ☑ Our firm does not have the **PCLaw TE** module at this time.
    If your firm has the PCLaw TE module, you must install PCLaw TE v3.6 prior to installing PCLaw version 8.20.
  - ☑ Our firm does not have the **ePCLaw** module.
    If your firm uses ePCLaw, you cannot upgrade to PCLaw version 8.20 or higher.

Before Installing PCLaw 8.20

Windows Vista - Important Notice for Payroll Users

- Before upgrading a workstation to Windows Vista, please note that PCLaw Payroll is not supported on this operating system. If you require access to PCLaw Payroll, you must have at least one non-Vista workstation with PCLaw installed.
- Payroll data files may reside on any Windows computer, however, from a Vista workstation, Payroll is not available from the Tools menu.

Architectural Changes

- Significant modifications are made to the locations of PCLaw settings and some program files. Accordingly, **we strongly recommend performing a FULL SYSTEM backup** prior to installing this maintenance release. PCLaw is now installed per-user; as opposed to per-computer. PCLaw must be installed for each computer user who requires access.
- To have all files installed and registered properly in their new locations, please close all other applications, including proprietary linked products, such as Outlook Connection Manager before continuing the update. If your firm uses the PCLaw plug-in for WordPerfect, follow the procedure outlined in **Important Notice for Corel WordPerfect Users**.

Operating System Support

- On new installations, Windows 95, Windows 98, Windows ME, and Windows NT4 are no longer supported.
- Windows 2000 and 32-bit versions of Windows 2K3, Windows XP, and Windows Vista are supported.
- Terminal Services is now supported.
- Upgrading from an existing operating system to Windows Vista is not recommended.

Important Notice for Corel® WordPerfect® Users

- If your firm currently uses the document plug-in for WordPerfect, prior to installing PCLaw 8.20, do the following:
  1. From the Options menu, select Connection Settings.
  2. Clear the checkbox **Enable Connection with Corel WordPerfect**.
  3. To save your settings, click **OK**.

  After installing version 8.20, log into PCLaw to complete the update.
  1. From the Options menu, select Connection Settings.
  2. Select the checkbox **Enable Connection with Corel WordPerfect**.
  3. To save your settings, click **OK**.

Microsoft SQL Clients

- On new installations, PCLaw provides Microsoft® SQL Server 2005 Express Edition.

Microsoft Office 2007

- Document toolbars, Microsoft timers and Outlook Connection plug-ins support the new version of Microsoft Office.

Adobe Acrobat PDF

- The PDF driver is updated to support the Window Vista operating system.

Tokens for Reports and Templates

- For Receipt templates and for some client-based reports, the **Date Entered** token is now available.

Features Added in Previous Version 8 Releases

Licensing Changes

- PCLaw gives you the ability to communicate with our licensing server. For better accessibility, we update our server so you can activate changes to your PCLaw licensing online. Activations can still be performed by phone during regular business hours.
- After updating to version 8.10, if the number of active timekeepers in your data exceeds that of your current license, PCLaw gives you the opportunity to deactivate the timekeepers you no longer require. You may also contact our sales department to increase the number of timekeepers in your license.

Reporting Features

- Report features of specific reports are enhanced allowing you to change the font, alignment, and layout of specific reports. You can also choose which fields to display. Create new report layouts and make changes to existing non-default layouts. Fifteen reports are now customizable.
- The List of Clients report can now include custom fields from Matter Manager, as well as split lawyer rates.
- Options > Lists > Lawyers and Rates allows you to set rate changes based on date and print the report in a variable layout.
- The Payment Method is added to the General Bank Journal and the Trust Bank Journal reports.
- A Microsoft® Excel® button appears on the report toolbar if the contents can be saved in an XLS format.
- New tokens are added to Billing Fees Journal and Receivables by Client reports.
- The Invoice Journal option Display in Order Entered, formerly on the Other tab, is now moved to the Common tab for easier accessibility.
- The new Client Trust Ledger replaces the detailed section, formerly on the Other tab of Client Trust Listing. The Client Trust Listing is the summarized balances only.

Billing

Before You Bill

- You can now automatically charge a specific amount to a client for disbursements on a one-time only or a monthly recurring basis. You can create a disbursement entry at every billing cycle for a percentage of fees. Enable the default options in System Settings and configure the feature on the Billing tab in Matter Manager.
- You can also configure and modify matter settings using the Global Change feature. New Matter Defaults and New Client Defaults are updated to include this feature.

Track Time from Microsoft® Office Software

- A PCLaw toolbar is now available for Microsoft® Word®, Excel®, PowerPoint® and Outlook® that provides you with the ability to track time while you perform the respective tasks in these programs.

Time Adjustment

- Reducing the duration of a time entry automatically creates a second time entry for the difference. The Hold Options for this adjusting entry is set to Never Bill and the Task Code is set to a new code TR, Time Reduction, making it easy to track.
- The Automatically Track Time Reduction check box is found on the Data Entry tab in System Settings as well as the Correct Time Entry screen. Setting this option requires the Allow Charges to be Held feature to also be selected.

Bill Output

- The option to automatically create invoices in PDF format is now available for Pre-Bill, Bill, Settlement Statement, Recreate Bill, Request Bill, and Release Bill. Look for the checkbox in the Output section of the specific functions. On the Billing tab in System Settings, you can choose to automatically generate the PDF output and save the invoice documents to the matter.
- If you are using a MAPI-compliant e-mail application, choosing E-Mail as your invoice output automatically inserts the e-mail address stored in Matter Manager into the To box of the email message.

Multiple Invoices

- Now, you can select the Multiple Invoices option in the Recreate Bill feature to recreate multiple invoices at once. You can choose multiple invoices by date range and/or a range of invoice numbers.
- You can also select the Multiple Invoices options in the Undo Bill feature to undo multiple invoices. The Change/Write Off Bill feature allows you to write off all the outstanding invoices for a matter when you select the Write Off all Outstanding Invoices for this Matter checkbox.

Practice Management

Conflict Search

- The Conflict Search feature is now a quick and easy way to perform a complete and comprehensive search of your PCLaw data to find all possible conflicts. Custom areas from Matter Manager and documents are now included. The new Global Search feature displays available options allowing you to customize which areas to search.
- You now have the ability to search for an exact phrase in the Global Search feature. Select the check box Find Phrases on the Global Search window to have PCLaw search for instances where the specified phrase appears.
- These features are further improved by offering additional options in 8.03a. Now, PCLaw allows you to select from the **Name Matching Rule** drop-down menu. The available choices are Name Contains, Name Starts With, Exact Match, and Full Phrase.

Calendar and Phone Calls

- You can now choose which fields to display on the daily calendar view. Click the Appt Display button on the Calendar tab in Workstation Settings. You can choose when you want to be reminded for an appointment on an individual basis. You can also associate a sound alert to an appointment reminder.
- The ability to Post Time has been added to the menu when you right-click on a calendar entry or a phone call. A spell check button is added to both Calendar and Phone Messages. Multiple Phone Message windows can be open at the same time.
- Calendar security settings allow you to select deleted/de-activated timekeepers.
- You now have the ability to hide the front-end features of PCLaw. The Use Calendar and Use Phone Calls check boxes are combined with the Use Document Manager check box. To select or deselect these features, go to the Front Office tab (formerly the Document tab) in System Settings.

Documents and MS Word

- A new check box controls how fields are updated when you open documents in Microsoft Word. To have PCLaw automatically update the existing document with current client and matter details, on the Document tab in Options > Workstation Settings, select Always update PCLaw fields in MS Word Documents on Open.
- Conversely, leave the check box deselected to maintain the integrity of the existing document.

Matter Manager

- To e-mail multiple documents to a specific matter, use the Document tab in Matter Manager to select them all at once.
- Billing Address and Second Billing Address are added to the New Matter Defaults feature.
- For your convenience, the Fax button in Matter Manager launches the Quick Docs Fax item. To save you time, all reports and entries launched from Matter Manager now default to the current matter.

Closing Matters - Australia

- A new feature is added to the Matter tab of System Settings. If **Clear Trust Entries Before Archiving** is selected, when you archive or purge a matter that has trust activity, you are prevented from closing the matter until the trust entries are cleared on a PCLaw bank reconciliation for the specific trust account.
- If the check box is not selected and a bank reconciliation for the specific account has been completed at any time in the past, a warning appears. If a bank reconciliation has never been completed on the specific account, no warning appears. To avoid the warnings, reset the bank reconciliation for the specific accounts.

Closing Matters – All Countries

- When you archive or purge a matter that has trust activity, the trust entries should be cleared on a PCLaw bank reconciliation for the specific trust account. If a bank reconciliation for the specific account has ever been completed, a warning appears. If a bank reconciliation has never been completed on the specific account, no warning appears. To avoid the warnings, reset the bank reconciliation for the specific accounts.

PCLaw Mobility

PCLaw Satellite and Express

- Both PCLaw Satellite and PCLaw Express add-on modules allow you to create and change appointments and phone calls as well as create new contacts.

PCLaw TE Module

- PCLaw TE version 3.53 offers improved calendar and contact support for Palm® Treo 600 and 650 handheld devices. Additionally, Palm and BlackBerry® handheld users experience faster synchronization times with this latest release.

Data Entry

General

- A Microsoft® Excel® button is added to the Register toolbar. Click the Excel button to save the contents of the current tab.
- The Spell button on the Register verifies the entire contents of the current Register tab.
- You can restrict users from viewing the matter balances in the summary areas by configuring advanced security. From the Options > Administrator > Security window, highlight the user, click the Advanced button, and then Other.

Trust - Australia

- The new feature **Date of Entry** is added to the Trust Receipt. This box is automatically filled in for you and cannot be modified. Additionally, the **Clnt Che #** box now allows up to 20 characters. The Trust Bank Journal is updated to display this value.
- Using the Trust-to-General Transfer feature, transfer amounts greater than the A/R balance result in a general retainer. You are notified with a message at the time of entry allowing you to proceed with the entry or cancel.

Trust – All Countries

- On the Trust Bank Journal and Trust Bank Matter-to-Matter Transfer Journal, Matter **Description** is added. Additionally, the Trust Bank Matter-to-Matter Transfer Journal is added to the growing number of customizable reports.

Client Receipts

- The Receive Payment feature allows you to select multiple matters. If you leave the Received From box blank on a Receive Payment or General Retainer entry, the client name is automatically entered when saving the entry for single matter or single client payments.
- You can enter the client's check number on a Receive Payment. A Clnt Che# column is available on the Client Ledger by default and can be added to selected reports. Click the Layout button on selected reports to add the column.
- A new payment method, Certified Check, is added. You can now allocate a General Retainer to any G/L account.

Accounts Payable

- When you print an accounts payable check, the explanation from the first allocation is used.
- You can now force the Vendor Name to appear on your 1099. Additionally, the 1099 information appears on the Vendor reports.

Cheque Template and Layout - Canada

- New templates, CPA2PT and CPA3PT, support the new cheque specifications prescribed by the Canadian Payments Association. The changes are also available in Quick Cheque Layout. These changes are based on the specifications provided on CPA Standard 006, updated July 2005.
- Quick Cheque Layout allows you to choose whether to display the dollar sign ($) on your printed cheques when using the CPA Layout.
- To access the new feature **Use Currency Symbol in Amount**: From the Options menu, select System Settings and click the Banking tab. Click the Quick Cheque Layout button, then Body.

Goods and Service Tax – Canada

- The GST rate changes are supported.
- You can now enter GST on receipts.

Settings and Other Features

- You can now change the default entry date in PCLaw without exiting the program. Select the feature Change Default Entry Date from the Tools pull-down menu.
- In the Register, the spell check feature searches each explanation box displayed on the current tab.
- Global indexing is configurable to run only on one station.
- Rate History is saved in the Lawyers and Rates feature.

Quick Step

- You can switch between the new look of Quick Step and the classic Quick Step. Right-click on PCLaw Quick Step and select the menu option Switch to Quick Step Classic.
- To better accommodate different screen resolutions and sizing of PCLaw, Quick Step is now better sized to the main PCLaw window. Close Quick Step and re-open for the resolution or size changes to take effect.

Template Editor

- For the active section, a list of available tokens is displayed on the right side of the Template Editor main window. Select different sections to view the token elements that can be added.
- A new element type, **Formula**, gives you the ability to display a calculated total. You can use numbers and/or other token values to obtain a result.
- PDF can now be selected as the Disk Output Format on an individual template.
- Ten new templates are created and are now available in the billing template library.
- The new Client Check Number token available on Receipt templates coincides with the Client Check # on receipts.

PCLaw Links

Microsoft® Outlook®

- The PCLaw-Outlook Connection is more flexible. You can choose which folders in Outlook to match. You can also select specific codes and fields.

Intuit® QuickBooks®

- You can now export your accounting data to Intuit® QuickBooks®. The option is accessed from the G/L pull-down menu and is available after an End-of-Month has been performed in PCLaw.