

## Frequently-Asked Questions

### Billing Matters®

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#### *General Information*

##### **Q. Why has LexisNexis® changed the strategy for Billing Matters?**

- A. Since the original discontinuation announcement in 2009, Billing Matters customers overwhelmingly told us that the billing capabilities of the software were an integral part of their daily workflow and firm billing processes and asked us to review our decision. As a result, we reviewed our Billing Matters strategy—conducting in-depth interviews with customers and members of our Certified Independent Consultant (CIC) community—to identify the best long-term solution.

Customers reported more use of the billing features than the accounting features—by a wide margin. Of those customers who actually used both feature sets, they reported a much greater level of satisfaction with the billing capabilities than the accounting capabilities.

Because of this feedback, we have decided to continue the **billing functionality** in Billing Matters software as well as technical support, maintenance and training for this piece of the product (modifying the original decision to discontinue the entire product as of December 31, 2013). We will also begin work to enhance and evolve the **billing functionality** of Billing Matters software for a future release. We will also be developing new training resources on the Billing Matters **billing functionality** and announcing those resources as they become available.

Please note however, the plans to sunset the **accounting functionality** in Billing Matters software (also known as “Billing Matters Plus”) remain unchanged. Technical support for the **accounting functionality** will continue to be available to customers who subscribe to a current Billing Matters Annual Maintenance Plan (AMP) or who have a current Time Matters with Total Practice Advantage™ Agreement until December 31, 2013.

We will continue to resolve known issues in the **accounting functionality** and provide technical support in accordance with our standard practice until December 31, 2013. Thereafter, all issue resolution, technical support and training for the **accounting functionality** will cease for all customers, including those with active Billing Matters AMP subscriptions.

##### **Q. Why is LexisNexis keeping billing functionality and not the accounting piece?**

- A. Only a subset of Billing Matters customers uses the product’s accounting capabilities. Over the last several Time Matters® software releases, we have improved the integration between Time Matters and LexisNexis® PCLaw®, as well as LexisNexis® Juris®, both of which provide both legal-specific billing and accounting capabilities.

Additionally, Billing Matters software integrates with Intuit® QuickBooks®, providing Billing Matters customers with a variety of options to meet their accounting needs.

**Q. When will the accounting functionality in Billing Matters software be discontinued?**

A. The accounting features will officially be discontinued on December 31, 2013. After that date, there will not be any software updates, upgrades, service packs or hotfixes issued or live answer technical support or training provided to customers, including those with active Billing Matters AMP subscriptions.

**Q. What features are specifically being discontinued in Billing Matters?**

A. The following features will be discontinued in Billing Matters, effective December 31, 2013:

- Firm Accounting / General Ledger (G/L)
- Financial Reports
- Account Reconciliation
- Account Register
- Accounts Payable (A/P)

**Q. Can I continue to use the accounting functionality now?**

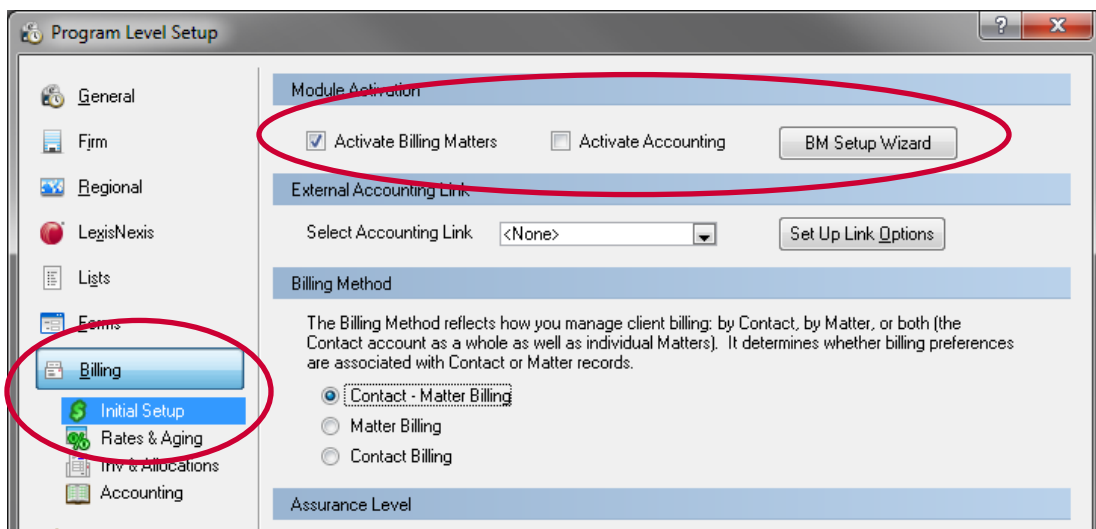
A. Yes, both the billing and accounting features in Billing Matters software will continue to work as usual between now and December 31, 2013.

**Q. Will I still be able to use the accounting functionality after it has been discontinued?**

A. No, a product release following the December 31, 2013 date will remove the software code and database elements exclusive to the accounting functionality.

**Q. Our firm uses the Time Matters software. How do I know if we are using Billing Matters?**

- A. To determine if you are using any part of the Billing Matters application, follow these steps:
- 1) Open your Time Matters software.
  - 2) Go to **File > Setup > General > Program Level > Billing** and click on “Initial Setup.”
  - 3) If the “Activate Billing Matters” and/or “Activate Accounting” boxes are checked, you are using Billing Matters.



## Migration Paths

### **Q. What are my migration options for the Billing Matters accounting functionality?**

- A. Both your current situation and desired future state will determine your available migration options.

If you are using the accounting functionality and would like to continue to use the Billing Matters billing functionality, Billing Matters integrates with Intuit QuickBooks software. [Click here to see a list of supported versions of QuickBooks.](#)

If you are using the accounting functionality, but would not like to continue using the Billing Matters billing functionality, Time Matters integrates with both [LexisNexis Juris](#) and [LexisNexis PCLaw](#) billing, accounting and financial management products.

We encourage customers considering a move to one of these systems to speak with their LexisNexis® CIC or Account Manager to determine the best path forward. There are multiple options—including data conversion services and training—to help simplify the transition of your accounting data to another system.

### **Q. What accounting software programs does Billing Matters integrate with?**

- A. Billing Matters integrates with Intuit QuickBooks accounting software. [Click here to see a list of supported versions of QuickBooks.](#)

### **Q. Is there a way for me to transfer my Billing Matters accounting data to another software program?**

- A. We encourage customers considering moving their accounting data from Billing Matters software to another product to speak with their LexisNexis CIC or Account Manager to determine the best path forward. There are multiple options—including data conversion services and training—to help simplify the transition.

### **Q. Is LexisNexis offering a license exchange option for Billing Matters customers who want to migrate to PCLaw?**

- A. For a limited period of time, if you have a current Billing Matters AMP, you may be eligible to exchange your Billing Matters license for a PCLaw license without paying additional license fees.

Contact your LexisNexis CIC or Account Manager to obtain details of subscribing to an appropriate AMP in support of any exchanged licenses. Your LexisNexis CIC or Account Manager will also be able to tell you the coverage period for your existing AMP and the renewal dates for any new AMPs. The fees for AMPs covering the number of users and timekeepers associated with any exchanged license will be in accordance with the AMP policies in effect [found here](#).

If you are a Billing Matters customer without a current AMP, for a limited period of time, you may subscribe to a Billing Matters AMP and then exchange your Billing Matters license for a PCLaw license. You also have the opportunity to subscribe to a PCLaw license with an AMP.

### **Q. Will I still be able see my old accounting data if I move to another accounting program?**

- A. We are currently working on a process for those customers who are moving to another accounting program but who also wish to keep a single copy of their Billing Matters accounting data for historical purposes. Please contact your LexisNexis CIC or Account Manager for details.

*Subscribing to Billing Matters Licenses and AMPs*

**Q. Can I license Billing Matters by itself, without Time Matters?**

- A. New customers may only license Billing Matters in conjunction with Time Matters. New users will be enrolled into Time Matters and Billing Matters AMP subscriptions.

Existing Billing Matters customers may renew, reinstate or subscribe to a Billing Matters AMP. Billing Matters customers may also license additional Billing Matters user licenses. These additional users will be enrolled into a Billing Matters AMP subscription which will renew at the same time as the existing AMP.

All current customers of both Time Matters and Billing Matters may renew, reinstate or subscribe to Time Matters and Billing Matters AMPs. Time Matters and Billing Matters customers must have active AMP subscriptions for both products as well as an equal number of software licenses to use both products.

Joint Time Matters and Billing Matters customers may also acquire additional Time Matters and Billing Matters user licenses. These additional users will be enrolled into Time Matters and Billing Matters AMPs which will renew at the same time as the existing AMPs.

**Q. I currently use Time Matters but not Billing Matters. How do I add on Billing Matters?**

- A. To add Billing Matters to your Time Matters environment, you must subscribe to the same number of Billing Matters software licenses and AMP subscriptions as you have for Time Matters. Similar to Time Matters, licensing for Billing Matters is based on the number of concurrent users of the software. Please contact your LexisNexis CIC or Account Manager for pricing details.

**Q. Does LexisNexis have services to help me move my data from my current billing system to Billing Matters?**

- A. LexisNexis CICs offer a full range of professional services to simplify the transition of your billing data from your current system to Billing Matters.

Depending on your firm's current system and needs, your client and matter information, unbilled time and expenses, and more may be transferred to Billing Matters. You can rest assured that your firm's data will be transferred accurately.

We encourage customers considering a move to one of these systems to speak with their LexisNexis CIC or Account Manager to determine the best path forward.

**Q. I just renewed my Billing Matters AMP subscription. Will LexisNexis honor it?**

- A. Yes, we will continue to honor all AMP subscriptions as defined in our [Annual Maintenance Plan Agreement](#).

**Q. I don't want to use Billing Matters any more. Can I renew only my Time Matters AMP?**

- A. Yes, you may only renew your Time Matters AMP; however, **you will lose all access to Billing Matters and your data when you upgrade to the next major version of Time Matters.**

**Q. What are some of the key differences between the Billing Matters and PCLaw software products?**

A. Key differences between the two products include:

Area of Difference	Billing Matters	PCLaw
Product Type	Add-on to Time Matters (same application code, database and user interface)	Separate application (different application code, database and interface from Time Matters)
Ideal for Firms with	Moderate bill volumes and/or complexity	Moderate-to-heavy bill volumes and/or complexity with accounting and case/matter management needs
Product Licensing	Must have the same number of licenses for Billing Matters as for Time Matters	When used with Time Matters, may have a different number of licenses for each product
Customization Capabilities	Fully customizable fields and workflows	Structured application with pre-defined workflows and limited customization capability
Firm Accounting Capabilities (Accounts Payable, Check-Writing, Bank Reconciliation, Financial Statements, Payroll)	Includes client trust accounting and firm accounting; however, firm accounting functionality to be discontinued on December 31, 2013	Firm and client trust accounting features included in the product, integrated payroll offered through ADP®*
Credit Card Processing of Client Payments	Not available	Secure, integrated credit-card processing available*
Client, Case and Matter Management Capabilities	Available through integration with Time Matters	Included in the product

\* Charges for third party credit card processing and payroll services are in addition to the subscription fees for PCLaw software and an Annual Maintenance Plan.

*Development Questions*

**Q. What enhancements are planned for Billing Matters software? When can we expect them?**

A. We will continue to develop and enhance the **billing capabilities** of Billing Matters going forward. Product enhancements to Billing Matters are being considered for the Time Matters / Billing Matters Time Matters with Total Practice Advantage™ v12 software releases, currently targeted for availability in Q4 2012.

**Q. What improvements have been made to the Time Matters link with PCLaw?**

A. Time Matters v11.0 includes the following changes to the link with PCLaw software:

- Multiple tagged billing items marked as “Expenses” can be sent to PCLaw.
- The performance of “Send to Billing” using the link with PCLaw has been improved.
- If Time Matters is set **not** to receive automatic updates from PCLaw, Time Matters will not receive them, even if PCLaw is configured to send them.

Additional improvements to the link are targeted for inclusion in a future release.

**Q. What enhancements have been made to the Time Matters link with Juris software?**

A. Time Matters v11.0 includes the following changes to the link with Juris:

- The number of characters permitted in the “Contact Number” and “Matter Number” fields in Time Matters now matches the limits supported by Juris.
- Updates sent from Time Matters to Juris are no longer sent back to Time Matters.
- After successful initial synchronization, subsequent matter changes in Juris reliably synchronize with Time Matters.

Additional improvements to the link are targeted for inclusion in a future release.

**Q. Is LexisNexis discontinuing the Time Matters, PCLaw or Juris products?**

A. There is no plan to replace or discontinue Time Matters, PCLaw or Juris software. Robust, award-winning solutions with thousands of satisfied customers, all three software products are critical pieces of the LexisNexis Law Firm Practice Management product portfolio.

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