Before You Download PCLaw™ 10:

- ☑ I have done a **FULL** backup my PCLaw data files and documents.
- ☑ I have closed PCLaw and all other applications that link with PCLaw on **all** computers.

New Features

Safe Custody

PCLaw's physical closed file management system, Safe Custody, allows you to track your physical client items and records such as wills, deeds, bonds, closed files etc. easily.

PCLaw **Safe Custody Manager** allows you to store and maintain details regarding any property you hold on behalf of your client.

Create a new Safe Custody record, identify the record type (i.e., will, lease, etc.), create your own custom packets (i.e. physical reference such as a specific box, file cabinet, etc.), and add locations for where property could be stored.

Not only can you specify a date to review the record, but you can also attach a scanned image of a document or item.

The **Custody Listing** is a new report corresponding to the Safe Custody feature for physical file management. It displays all movements, packets, and records you have created using the Safe Custody Manager.

To enable this feature:

1. From the Options menu, select System Settings.
2. Click the Front Office tab.
3. Select the checkbox **Use Safe Custody Manager**.
4. Click **OK**.
5. Restart PCLaw.

Auto backup feature with a scheduler

Now you can create an automatic backup schedule within PCLaw. Perform backups when it's convenient for you and your firm.

PCLaw backs up your PCLaw data on a set schedule so you never forget. Configure how frequently you want to create backups; define your routine by calendar day, business day, week, or month. Additionally, specify the time of day to run the process so there are fewer interruptions to your daily routine.

To enable the Automated Backup and Scheduler, the following steps must be completed:

1. From **Options**, select **Connection Settings**.
2. Select the check box **Use This Set of Books when Connecting to Other Programs**.
3. Select the check box **Store Password** and type a secure password.
4. Click **OK**.

To access the scheduler to configure your options:

1. From the **Options** menu, select **Workstation Settings.**
2. In the Perform Data Copy area, select the check box **Automatic**.
3. To create a backup schedule, click **Configure**.

Time Entry

Track time hours and minutes instead of using the decimal system for more accurate billing. Select the checkbox **Save Time in Hrs and Mins** on the Data Entry tab of System Settings.

Tokens, reports, billing, and all other features – including Quick Timer and all other timer features within PCLaw – that capture time are modified to provide you with the flexibility your firm and client's need.

Rate Exceptions

Expanded rate exceptions now include exceptions at the matter level based on explanation codes for greater billing flexibility per client

Fee Adjustment and Courtesy Discounts

Changes to some core PCLaw billing calculations allow you to configure how to process fee adjustments or discounts. Specify how you want adjustments applied to matters belonging to individual clients:

Specific Matter – All fee changes or discount are assigned to a specific matter.
Prorated – All fee changes are prorated for all matters for that client based on billing amounts.
Manual Allocation – you specify how to divide the allocations for the matters belonging to the client.

The courtesy discount feature is expanded to allow you to prorate the discount amount for each matter under a specific client when performing a mass billing by client.

Expanded Existing Features

Billing

Prioritize Time Entries

The new time entry ranking feature allows you to organize existing time entries into a logical sequence so they are displayed in the order you choose. This feature allows you to fix any discrepancies in the way time was entered into PCLaw, making it easier for your client's to understand their invoices.

From the Register, Matter Manager, and Select Charges window (when creating a bill and choosing the option to Select Charges), you can set the priority on time entries so they appear on the bill in the specific order you choose. Use the available buttons on each of these windows to Move Up and Move Down entries.

To have PCLaw display your time and fee entries on the bill in the order you set, regardless of date, on any of the Register, Matter Manager, or Select Charges screens, make sure to select **Orig. Entry #** as your **1st** sort option on the Fees tab of the Create Bill feature.

Refresh Pre Bill

You now have the ability to refresh the on-screen Pre-Bill without leaving the initial screen output. In previous versions of PCLaw, after a pre-bill is processed, you can drill-down on any of the entries and make an adjustment, but you had to re-run the pre-bill in order to see the changes. Now you can click the Refresh button on the toolbar to have PCLaw reload the pre-bill with the original settings.

Exclude If AR balance from Billing

When performing a mass billing, select the same options as in previous versions with one addition. The option to Include if A/R and Ignore if A/R Less Than has been consolidated into one check box, Include if A/R Balance At Least. An additional option is added allowing you to exclude any matters with an A/R balance from the billing run by selecting the new option, Exclude if A/R Balance, on the Option tab.

Reports

On the Billing Fees Journal, hard and soft costs are split out in the summary area.

The Custody Listing is a new report corresponding to the Safe Custody feature for physical file management. It displays all movements, packets, and records you have created using the Safe Custody Manager.

Paying off Previous Balances from Trust at the time of billing

You can chose to include all existing A/R balances in the trust transfer process when performed at the time of billing. Select the option **Apply Trust Transfer to Existing Invoices** on the Billing tab of Matter Manager to affect a specific matter or apply to all matters using the Global Change feature.

Template Editor

Formula Elements and New Tokens

Additional template token elements are created to help display exactly what you want on your invoices. The formula element now calculates up to three decimal places.

Invoice Number on Billing Summary page

Additional template token elements are created for the billing summary page of the billing templates to display the invoice number on the summary area.

Banking

General Retainer Balance Threshold

A general retainer threshold allows you to give additional replenishment reminders when balances drop below three threshold levels you specify in Matter Manager.

In addition to the minimum retainer amount set on the Billing tab of Matter Manager, you have the ability to configure multiple thresholds; minimum, target, and maximum.

Ask if Bal. Below – The amount required, at minimum, to retain as a general retainer.
Target Balance – The amount you would prefer to maintain as a general retainer.
Maximum Balance– The amount you do not want to exceed.

Increase Client Check Number

On any general receipt feature, **Client Check Number** has been increased to hold a maximum of 19 characters.

Trust

Trust Balance Threshold

A trust retainer threshold allows you to give additional trust replenishment reminders when trust balances drop below three threshold levels you specify in Matter Manager.

In addition to the minimum retainer amount in trust set on the Billing tab of Matter Manager, you have the ability to configure multiple thresholds; minimum, target, and maximum.

Ask if Bal. Below – The amount required, at minimum, to retain in trust.
Target Balance – The amount you would prefer to maintain in trust.
Maximum Balance– The amount you do not want to exceed.

Trust Ledger Threshold

A new filter is added to the Other tab of the Trust Ledger report. Select the option **Matters with Balances Greater Than or Equal to** and specify a balance to filter your results based on trust balance.

Increase Client Check Number

On the Trust Receipt, **Client Check Number** has been increased to hold a maximum of 19 characters.

Usability

Color Changes

The default colors used for Matter Manager, Client Manager, Contact Manager, Phone Call Manager, Document Manager, and Calender are updated. If you or anyone in your firm has customized the color of any these 6 features, your scheme is maintained. If you would like to use the new defaults, click **Defaults** on the Color tab of Workstation Settings.

Grid Font Overrides

You can now override the default fonts used on the grid screens (all data entry screens including Time and Fee entry, Expense Recovery, Trust and General Checks and receipts, just to name a few) in PCLaw and set them to whatever font is desired, in previous version this was all controlled by the windows fonts. This setting is now independent of the windows font and will only affect the grids within PCLaw. From the **Options** menu, select **Workstation Settings** and select the font style and size in the Grid area.

Explanation code column added to Matter Manager and Register

A new column is added to the Time Tab of Matter Manager. Explanation Code is now also available from the Register on the Time, General, Trust, Expense, Ledger and AP tabs.

General Ledger

Option to select all GL accounts when running financial statements

When generating any of the financial statements, a new button is available from the Selected account option of your G/L Account Selection. Click the **Select** button and choose Select All/Deselect All to save time.

GL adjustments into a bank account now reflects on the General Bank Journal report

You now have the ability to create a G/L Adjustment to the G/L account of a general bank and have PCLaw automatically post your entry to the General Bank Journal. The entry appears everywhere a check or receipt appears including the Register and Bank Reconciliation features. Select the check box **Show Journal Entry on Bank Journal** on the G/L Adjustment window.

Improved search ability in G/L account listing

You can now switch between a tree view and a list view (as in previous versions of PCLaw). Additionally, in the tree view, you can now search by account name. From **Options** > **Workstation Settings**, select the check box **Use Tree View Pop-Up**.