

PCLaw™ 15.5

Release Notes

Obtaining the Software

PCLaw is available via download. A download link appears in your product key email. To request an upgrade [click here](#)

Before You Install

* Important

The following information is applicable to anyone NOT on the PCLaw 15 platform

Be sure to do the following before installing PCLaw™ 15:

- Check the minimum recommended Server and Workstation [system requirements](#) and ensure your host system meets them.
- Review the [PCLaw 15 Installation Guide](#).
- Review the [Getting Started video](#) for a preview of the installation process.
- Perform a complete backup on your PCLaw data files and documents.
- Close PCLaw and all open applications on your computer.
- Ensure that you are installing the program with administrative permissions/rights.
- Existing PCLaw Users:
 - Please ensure that you have completed the [Verify Data Integrity](#) process.
 - Please generate and compare the balances of the following reports immediately **Before and After** the PCLaw 15 installation. If they do not match, please contact customer support at 0800 222 338.

- General Bank Journal - Select **Reports > Journal > General Bank > Other** tab and then select **Totals Only**.
- Trust Bank Journal - Select **Reports > Journal > Trust Bank > Other** tab and then select **Totals Only**.
- *Client Summary - Select **Reports > Client > Summary**, and click **OK**
- *Billing Fees Journal - Select **Reports > Journal > Billing (Fees)**, select **Firm Totals Only** and then click **OK**.

After running each one of the above reports, record the balances or print the report to compare the balances.

* Note

Compare the Accounts Receivable balance on the Client Summary and Billing Fees Journal immediately **Before and After** the PCLaw 15 installation is completed as the Accounts Receivable must always match. If the Accounts Receivable do not match, please contact support at 0800 222 338.

What's New in This Release

Version 15.5

There are no new features/enhancements for PCLaw 15.5.

Version 15.4

- Display additional fields on a bill template trust section
- Automate controlled money account receipt numbers for Australian systems
- The ability to split hard and soft costs into different sections on a bill template
- Separately record an Authoriser on trust payment transactions for Australian & New Zealand systems.

Version 15.3

Support for Amicus Small Firm and Premium 2016.

Version 15.2

There are no new features/enhancements for PCLaw 15.2.

Version 15.1

The following features and/or enhancements are new in PCLaw 15.1.

- Support for Microsoft® Office 2016

- Support for Microsoft® Windows 10

- PCLaw SQL Technology Refresh Continued
- Newfoundland & Labrador
 - Changes have been made on the Provincial Tab of Systems Settings to accommodate the new rates for Real Estate and Civil Litigation transactions.

Previous Features and Enhancements

SQL Database Foundation

PCLaw 15 brings a significant technology refresh to the PCLaw platform by migrating the core database to Microsoft SQL Server, an industry leading database solution. The platform migration to a Microsoft SQL Server database allows LexisNexis to deliver even more feature enhancements and capabilities.

Benefits to Lawyers and Staff

- A modern database foundation to support growing firm needs.
- Spending less time on database management activities helps firms provide better client service, increase operating efficiencies and ultimately reduce expenses.

PCLaw 15 is part of the LexisNexis strategy of keeping PCLaw as the leading all-in-one practice management solution in the market.

Issues Addressed

Version 15.5

The following issues have been addressed in PCLaw version 15.5:

Accounts Payable

- 6660633 If a payable entry with multiple allocations and GST is opened, the allocations display as expected.
- 6708920 (Accrual Systems Only) Changing an unbilled A/P entry to include quantity x rate no longer saves both the original allocation along with the change that was made.

Banking

- 6680940 The trust bank balance displays correctly on the check stub for release checks.

Billing/Bill

- 6359031 Taxes on disbursements are calculated per disbursement and then added as opposed to taxes on the total of all disbursements.
- 6655849 Recording a fee amount at the time of billing and selecting the calculate button no longer produces an error message.
- 6663658 Choosing the option **Print Matters in order selected** when generating bills or pre-bills, generates them in the order expected.
- 6671646 On the **Select Charges** screen for bills and pre-bills, disbursements can be changed without PCLaw closing unexpectedly.
- 6672312 Users no longer receive an **improper argument** message when editing general bank entries that have allocations to matters.
- 5642691,
6137195,
5960127 If a Settlement statement is generated to email for a matter with an A/R balance, the email body no longer displays twice the amount.
- 6666537,
6738009 If Time Reduction is activated and a time entry is changed to \$0.00 and set to **Never Bill**, it no longer appears on pre-bills or bills.

6703939 Split fee records apply the correct task code if task based billing is enabled on the matter.

6720324 Undoing invoices from a closed month removes them from the client ledger as expected.

Client Manager

6656089 The trust balance in the matter tab of the client manager displays cents as expected.

Dashboard

6568516 The My clients tab displays the contact role as expected.

Data Entry

6643279 Accent characters in explanation fields are no longer displayed as question marks.

6652174 The Transfer Expenses function performs as expected.

6666217 New Payables are saved as expected if you choose **Client Disb Recovery** as the G/L Account for posting.

6684522 The date on a trust check can be changed to a future date.

Matter/Matter Manager

6567294 Tabs that are deleted from the matter list are not displayed.

6672370 Deactivating matters by client, displays a list of available files to be closed.

6645954 The last file modified in Matter Manager no longer shows as **Last Matter** in the new matter screen.

6732386 If split lawyer charges is enabled for a matter, the changes are saved.

Options

6652218 Location codes can be removed as expected.

Phone Call Manager

6576892 Saving changes to a phone call message no longer produces an error message.

Reports

- 6622634 Customers on Microsoft Outlook 2016 can create, save and email PDF Reports and Invoices from PCLaw as expected.
- 6642183 The appointment listing now displays with the sort order selected.
- 6679076 The GST journal displays the details of the period specified as expected.
- 6685804 When an invoice is undone where a retainer has been applied, the payment allocation listing is updated as expected to reflect that the payment has been undone.
- 6708827 The client ledger report with ***include corrected entries*** displays the Trust Balances accurately.
- 6725535 Adding a client payment to a deposit slip no longer causes the Account Receivable balance to display incorrectly on the Client Summary.

Security

- 6622532 If a user is granted access to multiple bank accounts through advanced security, the user has access to expense recovery entries.

Tools

- 6691155 The Reset Matter Balances tool under Verify Data Integrity applies to archived matters and updates them as expected.
- 6652848, 6718038 Removing a lawyer from the lawyers and rates screen works as expected and assigns the new lawyer.
- 6707734 If a General Receipt that is part of a Deposit Slip gets modified, the receipt appears in the bank reconciliation as expected.

Version 15.4

The following issues have been addressed in PCLaw version 15.4:

Billing

- 655541 If the ***Ignore Charges Less than \$0.01*** option is set during billing, invoices with balances of \$0.00 are not produced.

- 6616585 Prebills display payments with multiple allocations as a single payment.
- 6637095 Mass bills or Prebills do not include previously billed A/P entries.
- 6645252 When creating past due notices and the **Use second matter billing address** is enabled on some matters, PCLaw creates two copies for those matters.
- 6651907,
6653277 PCLaw sends the invoice to the email queue as expected.
- 6659036 The BillFlow Manager tool operates as expected even when there is only a partial BillFlow.

Calendar

- 6561657,
6591947 Appointment alerts are displayed as expected.
- 6611581 The Calendar Time tab printout totals match the Calendar Time tab Month-to-Date totals.
- 6654821 Calendar entries display as expected without overlap.

Connection Settings

- 6587667 When a document is saved to PCLaw, the PCLaw user name is displayed under **Author**.

Contact Manager

- 6588827 Notes are no longer duplicated.
- 6599099 The filters for Last Name and Matter return results as expected.

Dashboard

- 6637247 Switching tabs on the dashboard when using the Windows 10 Anniversary Edition works as expected.

Data Entry

- 6473229 The Time Entry Advisor tool has been optimized for better performance. **Note: The loading time of the Time Entry Advisor may vary. The first time it is executed, the system checks and processes data to display only those entries less than six months old.**

- 6544172 Balances display as expected within the Trust tab of the register.
- 6598074 Saving Firm receipts with GST is now available.
- 6600417 PCLaw provides functionality to add multiple Transaction Levy entries.
- 6607833 Filtering by Matter or Client in the Contact selection window displays the expected filter results.
- 6611430 If selected, the **Hold** status is retained for a General Retainer entry.
- 6617071, 6555896 Printing from the register is available.
- 6628662 Accounts payable entry changes are saved as expected.
- 6631751 Duplicate allocations are not produced when correcting Trust to General Transfers through Matter Manager.
- 6632021 Selecting a Task Code with a default hold status of Never Bill, sets the entry to **Never Bill**.
- 6687884 Correcting a Trust to General Transfer that applied to an invoice no longer creates a general retainer.
- 6697933 When multiple payments are applied to an accounts payable transaction, changes made to any of the payments are saved as expected.

General Ledger

- 6593114 Show Parent and Sub Accounts are displayed as expected on the Income Statement, if the option is selected.
- 6620367 The Show on Journal check box remains selected and the entry appears on the Bank Journal.
- 6643181 When a user drills down on a specific account on the income statement, the details that display are only for that account.

Matter/Matter Manager

- 6593227 The Summary tab refreshes the balances without having to close and reopen the tab.
- 6633414 PCLaw provides users the ability to delete rate exceptions or create an

exception for NBW with a 0.00 rate.

6643398,
6657153 Switching from one matter to another in Matter Manager is now optimized.

6650979 Matters with uncleared Trust Balances can be closed successfully.

Options

6644279 PCLaw provides users the option to delete phone calls from Phone Call Manager.

6657887 New users can be added with Enhanced Security Enabled.

Phone Call Manager

6606608 The Taken By field displays the user who created the Phone Message.

Register

6616709 Filters are persisted when printing from the register.

Reports

6509926,
6601761 The Fees Collected Summary is optimized for better performance.

6567203 Reports are displayed in Currently Defined Reports.

6587073 The Billing Realization Report is optimized for better performance.

6606822 In Cash sets of books, the G/L Reconciliation report generates as expected.

6607713 Vendor Ledger report displays trust checks as expected.

6612570 Manually typing a closed matter number for a client ledger produces a report for only the closed matter.

6615335 Client Costs Journal provides filtering by explanation code.

Tools

6585065 The total is displayed as expected when reprinting a deposit slip.

6601711 Verify Data Integrity indexes the Global Search Index as expected.

6664787,
6667683, Billed Bank Entries are saved when the entries are marked as cleared on the
6669905, bank reconciliation.
6663397

Version 15.3

The following issues have been addressed in PCLaw version 15.3:

Billing

- 6542802 If Matter Manager is open and a Quick Bill with new fee and disbursement charges is created, when previewing the Quick Bill, the new charges will no longer be removed from the invoice.
- 6547206 Editing e-mail in the Invoice E-mail Queue no longer produces an error message.
- 6563815 Attempting to create an invoice where ***the Prompt before posting*** and ***All trust transfers on one check*** options are enabled and then selecting No to post the bill, the trust to general transfer is recorded.
- 6569889 Trust Statements show correct balance if they contain checks with multiple allocations.
- 6593087 Bills can now be run by Non-Responsible Lawyer without error.
- 6606019 During the pre-billing/billing process, if you choose to print the Client Summary for multi-mattered clients, it includes all of the client details as expected.

Calendar

- 6586151 Non-Admin users are now able to create Recurring Appointments.
- 6591947 Appointment reminders now show properly at the selected time

Data Entry

- 6509782 Changing the Invoice Date on a New Accounts Payable entry does not update the Due Date.
- 6546919 Changing the value for a recurring entry produces an error message.
- 6551786 Trust Entries in a closed month cannot be voided via the Void/NSF function.

- 6553172 In the allocation section of a trust check or receipt window, if you tab into an additional allocation line (one that shows \$0.00 amount and no explanation) and saving the entry, displays an error message.
- 6579178 Voiding an Accounts Payable payment no longer produces an error or duplicates the payment.
- 6587497 If Rate and Amount are set to **hidden** in advanced security, users no longer see \$0.00 for the rate and amount of their time entries.

Express

- 6577958 Non-Admin users can bring up the Matter List from data entry menus in Express.

Matters

- 6570825 French characters with accents are now displayed as expected.
- 6570844 Custom tabs associated to a type of law are displayed when matters are created with that type of law.

Matter Manager

- 6509904 If Matter Manager is opened to the Main tab, the **Opened** field is displayed as active instead of the matter field.

Options - Admin-Security

- 6562648 If a user is excluded from having access to specific matters from advanced security, they do not have access to calendar entries for the matters the user is given access.

Options - Lists

- 6551850 The Event Colour for Lawyers set in Lawyers & Rates does not appear on all workstations.

Reports

- 6548042 If the client summary report layout is modified to include data from a custom tab, producing the client summary report fails to show the data from the associated custom tab.
- 6553178, 6576884 The drill-down function (to go to the source entry) on the Client Ledger does not open and produces an error message for trust transactions.

- 6566168 If a trust receipt is recorded with multiple matter allocations, the client accounting ledger incorrectly displays the total of the receipt for each matter as opposed to the allocation amount only.
- 6584685 Interest Due displays as expected on the Receivables by Client Report.
- 6585815 The GST journal no longer closes unexpectedly if PCLaw detects a missing vendor.
- 6591600 All summary sections of the Billing Fees Journal separate Hard and Soft Costs as expected.

Tools

- 6584986 Deleted bank accounts no longer show in Bank Balances Summary Screen.
- 6585228 If a deposit slip is reprinted, the receipts on the slip are no longer duplicated.

Tools - Bank Rec

- 6594356 Bank Errors and Prior Items can now be saved in the bank reconciliation as expected.

Version 15.2

The following issues have been addressed in PCLaw version 15.2:

Billing

- 6508976 If the **All Trust Transfers on One Check** option is selected during mass billing, an error is produced and billing is canceled.
- 6537821 If a disbursement with multiple allocations is entered on the billing screen at the time of billing, the invoice produced as well as the Billing Fees Journal both display the allocations incorrectly.
- 6541287 If the **Select Charges** option is used during billing and changes are made to the billed amounts, the taxes are not updated as expected.
- 6544373 If client payments entered on Quick Bills are saved without a payment type, an error message is displayed when attempting to edit the payment after the invoice is produced.
- 6548244 If the **Select Charges** option is used while writing off charges during billing, it may cause PCLaw to freeze, thereby creating a blank billing record.

Calendar

- 5511071 Changing the **Series** of Recurring Appointments fails to remove the original **Series**.
- 5553456 Printing from the Calendar's daily view does not include all of the appointments as expected.

Data Entry

- 6526372 Typing a vendor name that contains more than 32 characters in a **New Payable** does not automatically populate the details of the vendor.
- 6358921 Client payments that apply against multiple fee allocations for an invoice are not reflected as expected on the Client Ledger and Billing Fees Journal.

People/Matters

- 5366467 Using the **Name Search** function on the Matter Pop Up Help List does not include all matches as expected.

Reports

- 6502986 If the General Ledger Account for the Input Tax Credit allocation on a Payable entry is changed to anything other than the Sales Tax Payable account, running the Sales Tax Journal causes PCLaw to close unexpectedly.
- 5421279 The Client Accounting Ledger displays only trust cheque amounts up to 7 figures.
- 6522624 If a Trust Check is paid to a Vendor and the Vendor Ledger is produced with **Include Trust Checks**, the check amount is displayed twice in the Invoice column.

Tools

- 6535967 Adding a check through **Prior Items** in the Trust Bank Reconciliation does not update the Trust Bank Journal as expected.