

PCLaw™ Web-Based Training

LexisNexis is pleased to offer web-based training to PCLaw users. To better meet your needs and schedule, we provide sessions on a regular basis. Sign up for one of our web-based sessions, tailored to specific features and areas of PCLaw™ billing and accounting software. All training sessions are conducted using PCLaw 10. Session topics include:

- Clients and Matters
- Data Entry
- Advanced Data Entry
- Billing
- A/R, Payments and Write-Offs
- Template Editor — Basics for Billing
- Data Flow
- Month-End Procedures

Cost is **\$199** (+ applicable taxes) per session per simultaneous connection. **Save 30%** if you have a current PCLaw annual maintenance plan. For this session, you require:

- An Internet connection on your computer to access the training session
- Telephone access to listen to the training session
- Microsoft® Internet Explorer® to view the training session

[For more information or to register, please call 1-800-328-2898.](tel:1-800-328-2898)

Module 1: Clients and Matters

- Conflict and Global Search
- Conflict Search / Global Search
- Matters
- Matter Manager
 - Main Tab
 - Billing Tab
- Renumbering Matters/Clients
- List of Clients

Module 2: Data Entry

- Time and Fees
 - Timesheet
 - Quick Timer
 - Web Timer
 - Fee Sheet
 - Correcting Time and Fee Entries

- Client Costs
 - Expense Recovery
 - Cash Disbursements (General Cheques)
 - Recording Transaction Levies (Ontario)
 - Recording Transaction Levies (Newfoundland and Labrador)
 - Correcting Expense Recovery and General Cheque Entries
- Trust
 - Trust Receipt
 - Trust Cheque
 - Matter-to-Matter Transfer
 - Bank-to-Bank Transfer
 - Trust-to-General Transfer
 - Correcting Trust
- General Retainers
- Correcting General Retainers

Module 3: Advanced Data Entry

- Accounts Payable
 - Creating Vendors
 - Entering Invoices
 - Entering Invoices and Processing from a Single Screen
 - New Payable
 - A/P Reports
 - Correcting Payables
- Remitting GST
- Memorized Transactions
- Recurring Entries
 - Creating Entries
 - Access from the Recurring Entries List
- Batch Cheque Printing
 - Turning On the Batch Cheque Printing Feature
 - Adding Cheques to Batch Cheque Printing
 - Printing Cheques from Batch Printing

Module 4: Billing

- Billing Overview / Recommended Billing Procedures
- Creating a Pre-bill
- Anticipated Disbursements
- Split Billing
- Courtesy Discounts
- Undo Bill
- Quick Bill
- Creating Bills with the Quick Bill Feature

Module 5: A/R, Payments and Write-Offs

- Past-Due Notices
- Setup Interest for the Overall System
- Override the System Settings on a Matter-by-Matter Basis
- Change or Add Interest to Existing Invoices within the System
- Producing Past-Due Notices (Reminder Notices)
- General Receipts
- Receive Payment
- General Retainer
- Firm Receipt
- Change/Write-Off Bill

Module 6: Template Editor — Basics for Billing

- What Is Template Editor?
- How to Access the Template Editor
- New Template
- Saving Templates
- Defining Elements
- Placeholders for Variable Information
- Billing Templates
- Types of Sections
- Past-Due Notice Templates
- Special Elements (Age Phrase)
- Changing Phrases
- Other Templates

Module 7: Data Flow

- Chart of Accounts — Add/Change
 - G/L Accounts
 - Bank Accounts
 - Other Control Accounts
- General Ledger Transactions for the Following Functions:
 - General Cheques
 - Trust Cheques
 - Expense Recovery
 - A/P
 - Bills
 - Payments
 - GST Remittances
- Opening Balances for:
 - General Bank
 - GST
- Client-Related Items:
 - Trust

- A/R
- Unbilled Fees and Disbursements

Module 8: Month-End Procedures

- Reports Groups
- G/L Reconciliation Report
- Bank Reconciliation
- End-of-Month Function
- End-of-Year Function
- Closing Files

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