

What's New in PCLaw - Versions 6 - 9

If you have an older version of PCLaw and what to know what the accumulated changes between your version and the current version (9.3) are, there used to be no easy way to do that. In fact, you couldn't even find all the old "What's New" documents. It turns out they are posted on the LexisNexis web site at <http://support.lexisnexis.com/ltps/record.asp?articleid=5480>

However, I have assembled a cumulative list of the "What's New" documents below. This is not every single change they mention, as of course they like to pad the "new" features with minor changes that are relatively unimportant, and it does not include all the recent changes for Australia only (LexisNexis is making a big push into Australia and internationally in general). But hopefully I've got all the major ones. The versions and their life spans are as follows:

V. 6 - 6.6 July 2002 - Oct. 2003
 V. 7 - 7.63 Oct. 2003 - Sept. 2006 (PCLaw was acquired by LexisNexis in April of 2006)
 V. 8 - 8.20c Sept. 2006 - Sept. 2007
 V. 9 - 9.31 Oct. 2007 - present

Module	Description	Version
Interface Issues/Links to Other Products		
Menus/Input	New more "Graphical" Interface	6
	Can set specific timekeeper to be the default timekeeper on time entries	7.21c
	Lawyer Overview provides instant reporting on matters opened, hours worked, etc.	7.50
	Matter Export feature improved	7.5
	Ability to change billing rate effective as of a certain date (change in December effective Jan. 1)	8.0
	Can switch between "new look" Quick Step and Classic view	8.0
	Can track time reductions when changes are made	8.0
	Major structural changes made to accommodate Vista; Win 95/98 no longer supported	8.20c
	Ability to upgrade over more than one version (e.g., 7 to 9 directly)	9.2
Timers	Web Timer lets you record billable time entry directly from within Internet Explorer	6.1
	Can track time while in Office, Excel, Outlook, etc.	8.0
Third Party Software	Amicus link module updated. Requires patch from Amicus	7.20a

Module	Description	Version
	Can synchronize with Outlook without Microsoft security warnings	7.21c
	Link to LexisNexis Research (v. 7.5 was first release after acquisition by LN)	7.50
	SQL version of PCLaw first introduced	7.6
	Data can be exported to QuickBooks after Month End performed	8.0
	Outlook integration improved to include sub-folders in Outlook	8.0
	Support for the built-in Payroll product discontinued. Users forced to subscribe to ADP service	9.0
	Credit Card payment integrated via PPI	9.0
Client/Matter/Data Entry		
Matter Manager /Register	Matter Manager contains quick summary of everything going on in a matter. You can drill down to details of any item.	6
	Matter Opening Balances can be entered on the Open/New Matters	6
	Register Feature: displays all information in tabs (Time, Expenses, G/L, Invoices, etc.) if you have rights to see them. Filter lets you make more advanced selections (v. 6.1)	6
	Matters can now be assigned to multiple Matter Introducing Lawyers (PCLaw Pro). Percentage allocation can be assigned to them.	6.5
	Department Codes Introduced	6.5
	New Electronic Billing fields available from Matter Manager	7
	When creating new Matters, only have to enter mandatory information	7
	Renumber Matter/Client feature lets you change a number or transfer a matter to a different client.	7
	When closing a matter, prompted to reverse unbilled disbursements if desired (necessary in order to close matter)	7
	Can set default fields when creating a new matter	7.5
	The "Spell" option in the Register spell checks all the items, not just the selected one	8.0
	Matter list lets you see all matters and perform batch operations on them	9.3

Module	Description	Version
Custom Tabs	Custom Tabs can be added to hold additional information (for example property and negotiating information for real estate matters)	7
Billing		
Billing	Quick Bill lets you create a bill in a single step (while client is in office)	6
	Monthly Fee & Monthly Minimum Billing: lets you specify amount in addition to any unbilled entries for the month. Minimum Billing lets you specify minimum amount to bill even if billable hours have not reached that amount. (Only work with mass billing)	6
	Automatic transfer from Trust - transfers from Trust when Bill is created. Shows up as "Paid from Trust"	6
	Can Drill Down on entry in Pre-Bill to correct it	7
	Can produce Bills, Reports and G/L Statements in PDF format	7.10
	Export to PDF expanded	8.0
	Ability to email bills (one at a time)	8.0
	Export to Excel added to Register	8.0
	Can select multiple invoices when recreating (reprinting) Bills or Pre-Bills, as well as when undoing invoices.	8.0
	Can charge a specific amount for disbursements on a one-time or monthly basis; create a disbursement entry as percentage of fees.	8.0
	Can add memo fields to bills	9.0
Reports / Template Editor		
Reports	Layouts Tab lets you specify which fields to include in report. Layouts can be saved.	6
	Drill Down on Reports lets you click on any item on the report screen and see the detail for that item. Also available in the General Ledger (v. 6.1)	6
	"Find" lets you search report on screen for specific term	6
	Interest Report shows list of outstanding invoices broken down into principle and interest.	6
	Reports on Matters can be restrict to matters with a particular Matter Introducing Lawyer	6.5

Module	Description	Version
	Fee Adjustment Report (PCLawPro) shows increases or decreases to fees made at billing	6.5
	Custom Reports let you design your own report	6.6
	Can produce client ledger report in order by Responsible Attorney	6
	Payment Allocation listing can be broken down into hard costs and soft costs	6
	Lawyer Budgeting introduced (PCLaw Pro). Lets you set a budget per lawyer and run reports comparing budgeted with worked, billed, eetc.	6.6
	Can export selected reports to MS Excel	7.5
	6 More reports can be customized, for a total of 15	8.1
	Ability to print reports in Cash and Accrual (or Modified Cash and Accrual)	9.3
Template Editor	Available tokens organized into logical groups and displayed at right of editor	6
	Can print labels for contacts	7.5
	Limited ability to change fonts in reports	8.0
	Formulas in templates let you display some calculated fields	8.0
Banking / Financial / General Ledger		
Banking	Bank to Bank transfer lets you transfer trust funds from one trust account to another	6
	Can use "Deposit Slips" to reconcile total deposits instead of individual receipts (PCLaw Pro only)	6
	Recurring checks will pop up in a report on the day they are due when PCLaw is started	6.1
	Check numbers increased from 5 to 8 digits	7
	Batch printing of checks available	7
	Matter to Matter Transfer lets you transfer a retainer from one matter to another	7
	Recurring entries have 2 new frequencies: quarterly and semi-annually	7
	"Show Running Balance" option for General and Trust Bank Journals	7
G/L Statements	You can opt to include only G/L accounts with specified department codes	6.5

Module	Description	Version
	Can track revenue by Department.	7.50
	Can send data to Accountant and incorporate G/L changes back into PCLaw	9.3
A/R, A/P	Receive Payments lets you override how payment is allocated among invoices, fees, disbursements, tax and G/L accounts. New settings to make this allocation automatic	6
	Opening Vendor balances can be entered on the New/Open Vendor window. Vendors can be exported to a file (PCLaw Pro only)	6
	Can show the check number that paid the A/P Invoice	7
Expense Recovery	Now in a grid format so that more than multiple client expenses can be entered at one time	6
Correcting Entries	You can now delete or correct an entry in a closed month. A correcting entry will be made in the first open month.	6
Front Office Features - Document Management, Calendar, etc.		
Calendar	Can set up recurring appointments	6
	Linked events (Event B dependant on Event A) can be created	6
	Multiple people can be assigned to an appointment	6.1
	Continuances let you create a follow up appointment. Original appointment remains	6.5
	Can sort appointments by completed, uncompleted or both	7
	Can create all-day events	7
	Calendar Month View introduced	7.21
Phone Call Manager	Tracks phone calls and notifies PCLaw users a message is waiting. You can time phone calls	6.1
Document Management	Document Management feature introduced. Allows users optionally to save documents to PCLaw from Word or WordPerfect	7
Contact Manager	Lets you see combined view of Clients and Contacts	7.21
Internal Instant Messenger	Internal Instant Messenger for firms not linked to e.g. Time Matters or Amicus	9.3