Juris Instruction Guide

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(877) 377-3740 www.juris.com

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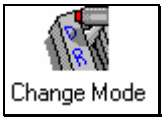
SETUP AND MANAGE

Introduction

The *Setup and Manage* area of Juris contains settings that affect the behavior of Juris functions throughout the application. These settings are made by the Juris Administrator in the firm, and access to most of these functions should not be available to the typical Juris user.

This section will cover the key functions in *Setup and Manage*. Other functions will be discussed in the "Other" portion of this instruction guide.



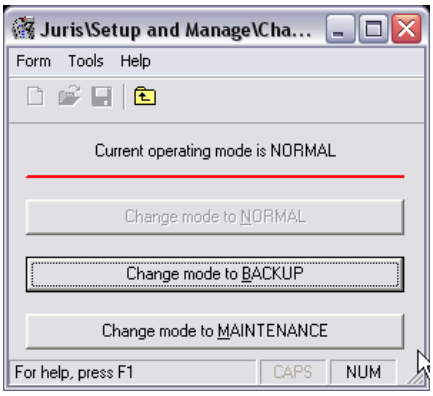
Change Mode

The *Change Mode* function may be used to lock down certain maintenance areas of Juris while the product is in use by the firm's staff (Normal Mode) and is also used to lock out users while maintenance functions or backups are being performed (Maintenance Mode and Backup Mode).

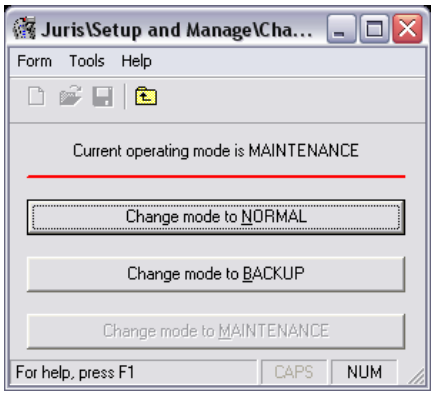
Exercise:

1. Select Setup and Manage → Change Mode
2. Review the three operating modes. Click *Change Mode to MAINTENANCE* and close the form.

Set to Normal Mode



Set to Maintenance Mode

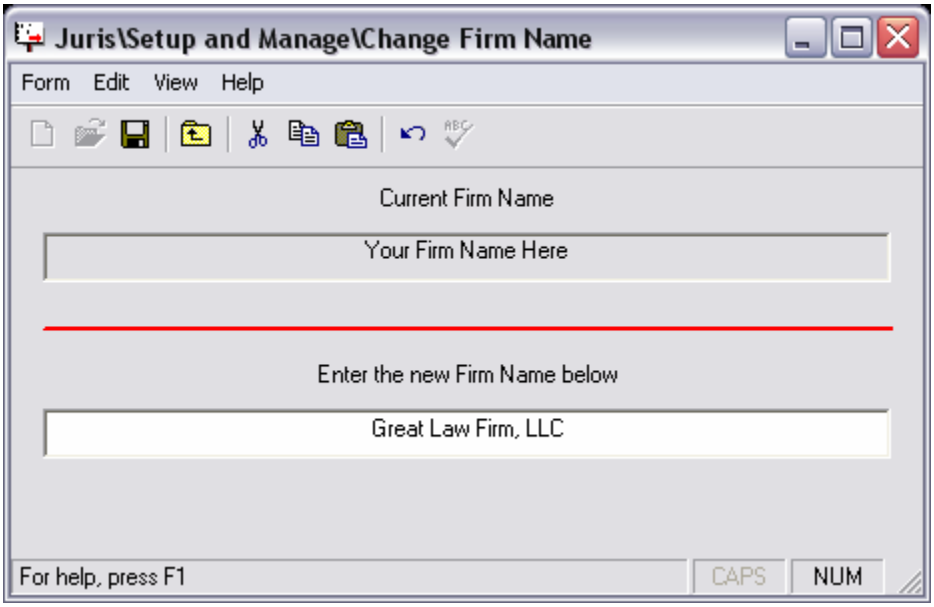


Change Firm Name

The *Change Firm Name* function allows the user to enter their firm name into the Juris system. The Firm Name will be used on reports and may be up to 60 characters in length. *Change Firm Name* is only available when Juris is in Maintenance Mode.

Exercise:

1. Open Setup and Manage → Change Firm Name
2. Enter your firm name in the space provided.
3. Save and close the form.

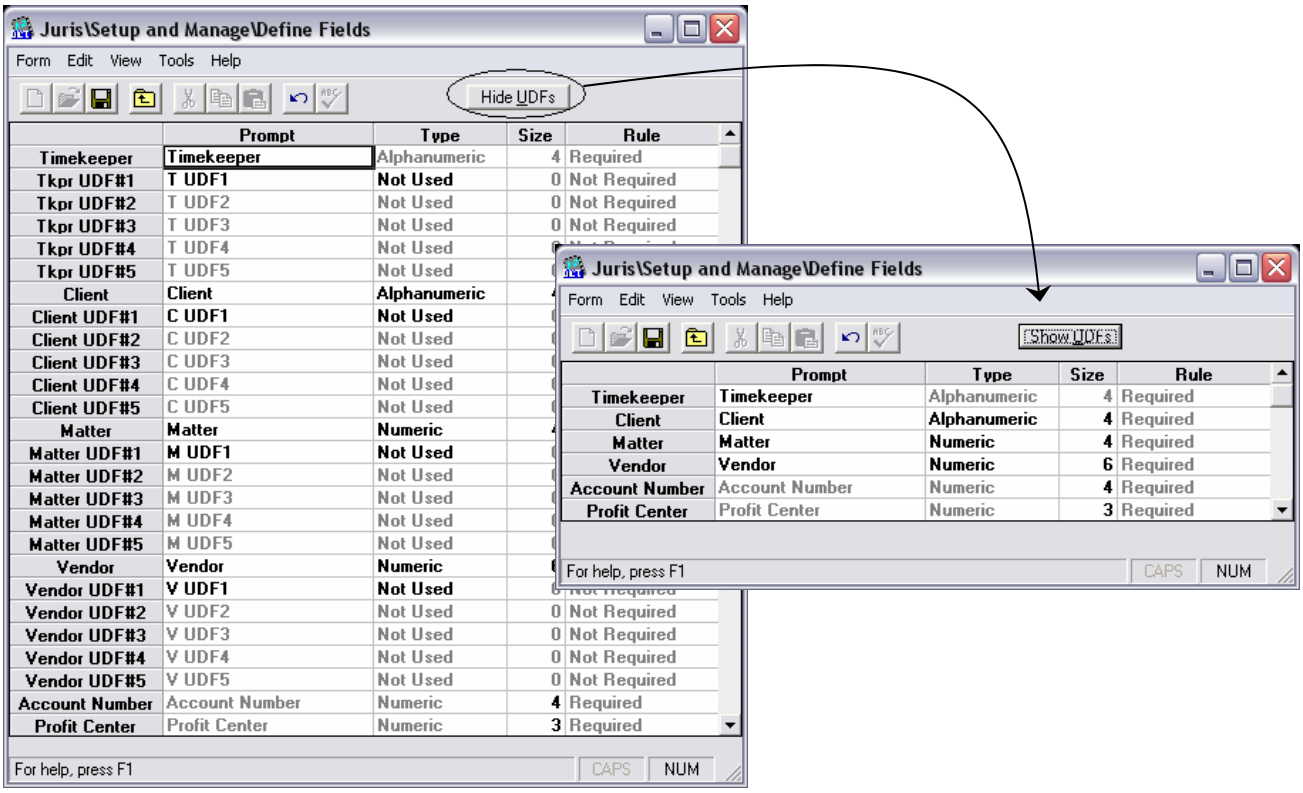


Define Fields

The *Define Fields* settings allow the user to customize certain Juris fields as well as add user defined fields. *Define Fields* is only available when Juris is in Maintenance Mode.

Exercise:

1. Select Setup and Manage → Define Fields
2. Review the default *Define Fields* setup
3. Select *Hide UDF's* to show only required Juris fields. Select *Show UDF's* to display all definable fields.
4. Select *Save*, then *Form* → *Close*.



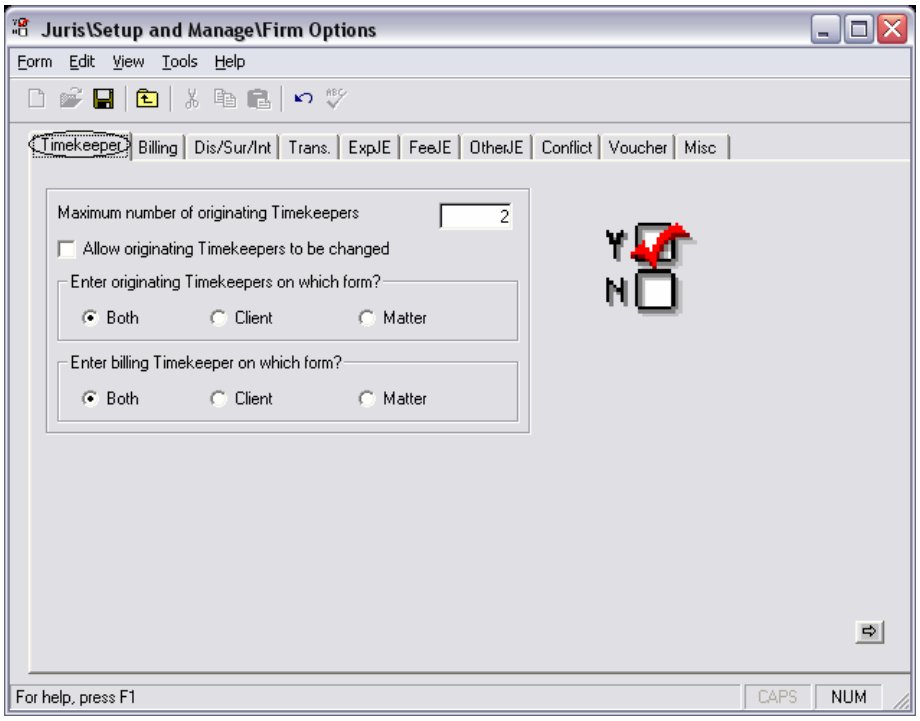
Firm Options

The *Firm Options* settings allow the user to customize the behavior of the Juris software. *Firm Options* is only available when Juris is in Maintenance Mode.

Exercise:

1. Select Setup and Manage → Firm Options
2. Review the options selected in the following forms.
3. Select *Save*, then *Form* → *Close*.

Firm Options – Timekeeper Tab



Firm Options – Billing Tab

Juris\Setup and Manage\Firm Options

Form Edit View Tools Help

Timekeeper | Billing | Dis/Sur/Int | Trans. | ExpJE | FeeJE | OtherJE | Conflict | Voucher | Misc

Enter billing thresholds on which form?
- (•) Both
- ( ) Client
- ( ) Matter
- ( ) Neither

Enter the default threshold for expenses: 0

Enter the default threshold for fees: 0

After Posting a Flat Fee Bill

Change Billing Frequency to
- ( ) Monthly
- (•) Cycle 0

Change Billing Agreement to
- (•) Hourly
- ( ) Leave as Flat Fee

Y N

For help, press F1 | CAPS | NUM

Firm Options – Discount/Surcharge/Interest Tab

Juris\Setup and Manage\Firm Options

Form Edit View Tools Help

Timekeeper | Billing | Dis/Sur/Int | Trans. | ExpJE | FeeJE | OtherJE | Conflict | Voucher | Misc

Enter discount percent on which form?
- (•) Both
- ( ) Client
- ( ) Matter
- ( ) Neither

Enter the default discount percent: 0.0000

Enter surcharge percent on which form?
- (•) Both
- ( ) Client
- ( ) Matter
- ( ) Neither

Enter the default surcharge percent: 0.0000

Enter interest percent on which form?
- (•) Both
- ( ) Client
- ( ) Matter
- ( ) Neither

Enter the default interest percent: 0.0000

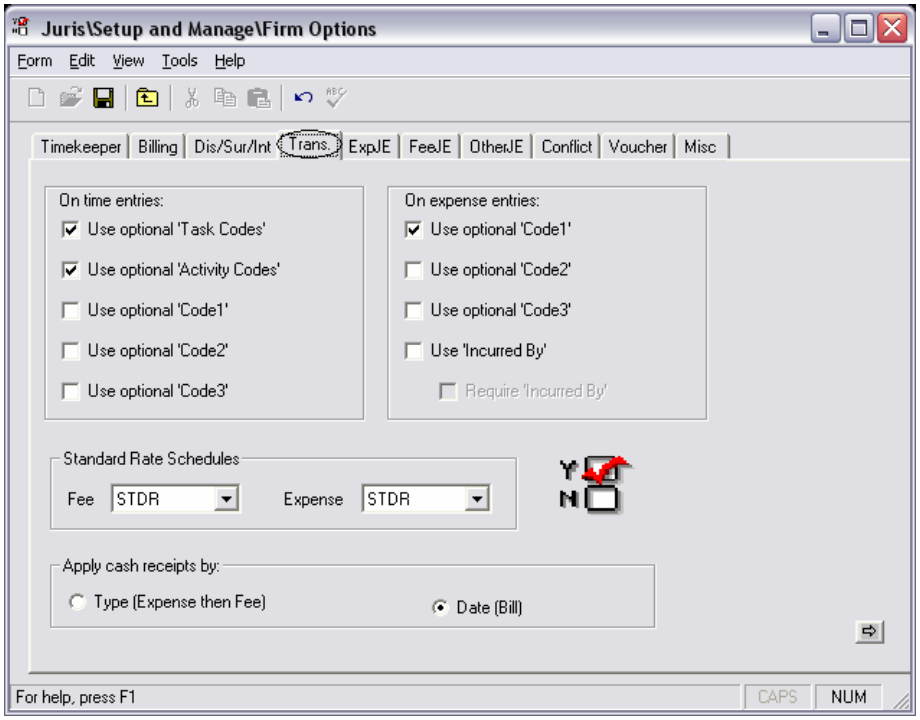
Charge interest after how many days: 0

Calculate interest by what method?
- (•) Simple interest
- ( ) Compound

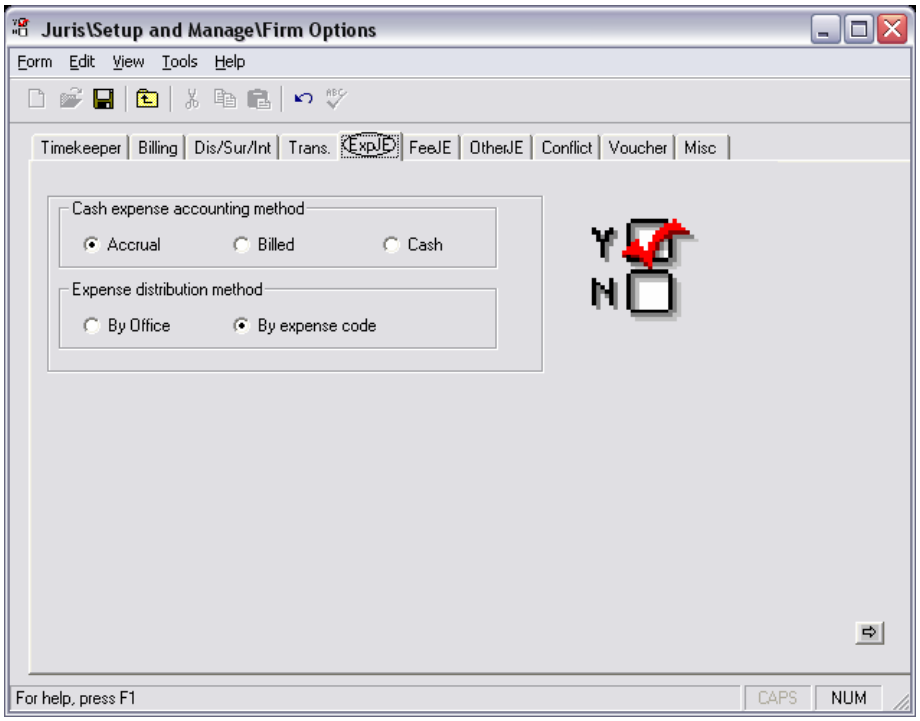
Y N

For help, press F1 | CAPS | NUM

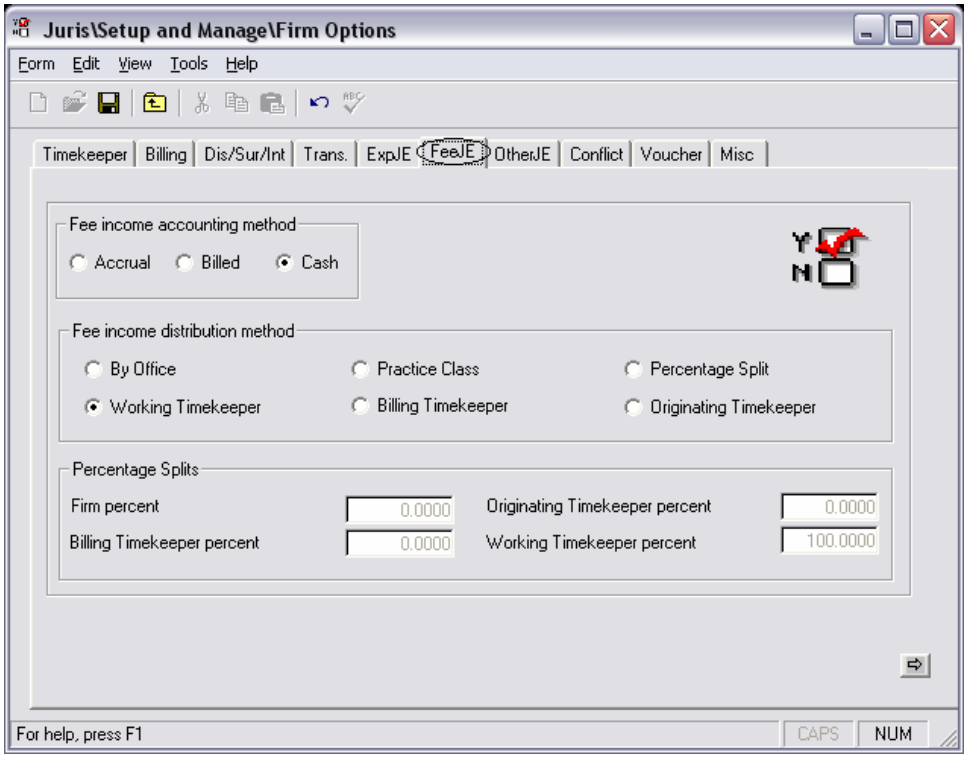
Firm Options – Transactions Tab



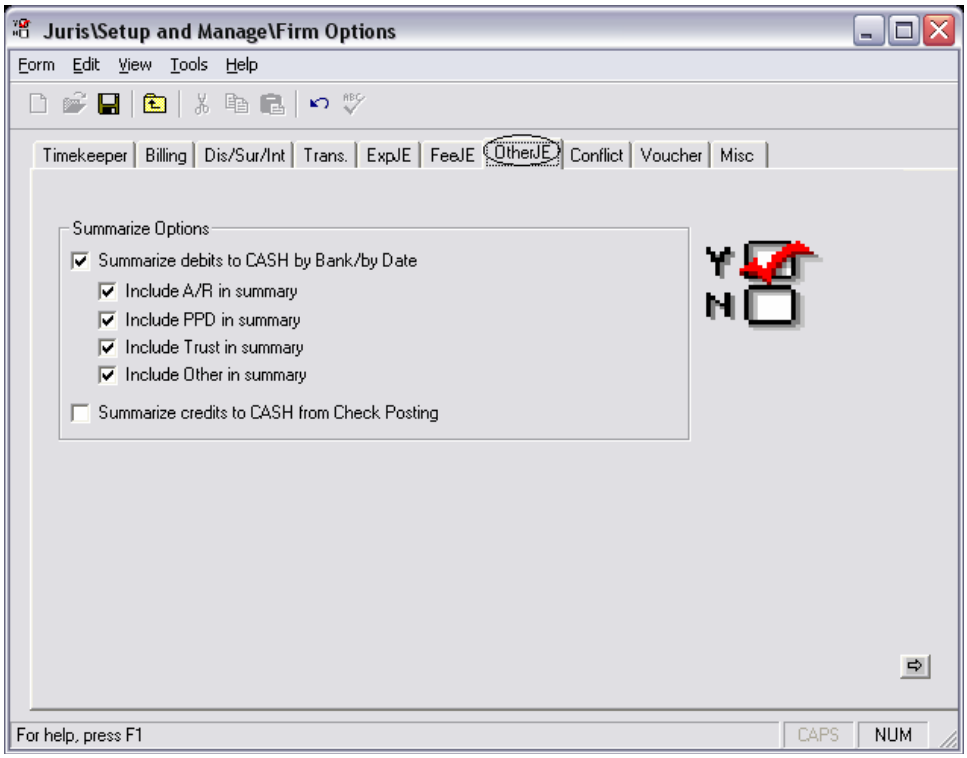
Firm Options – Expense Journal Entry Tab



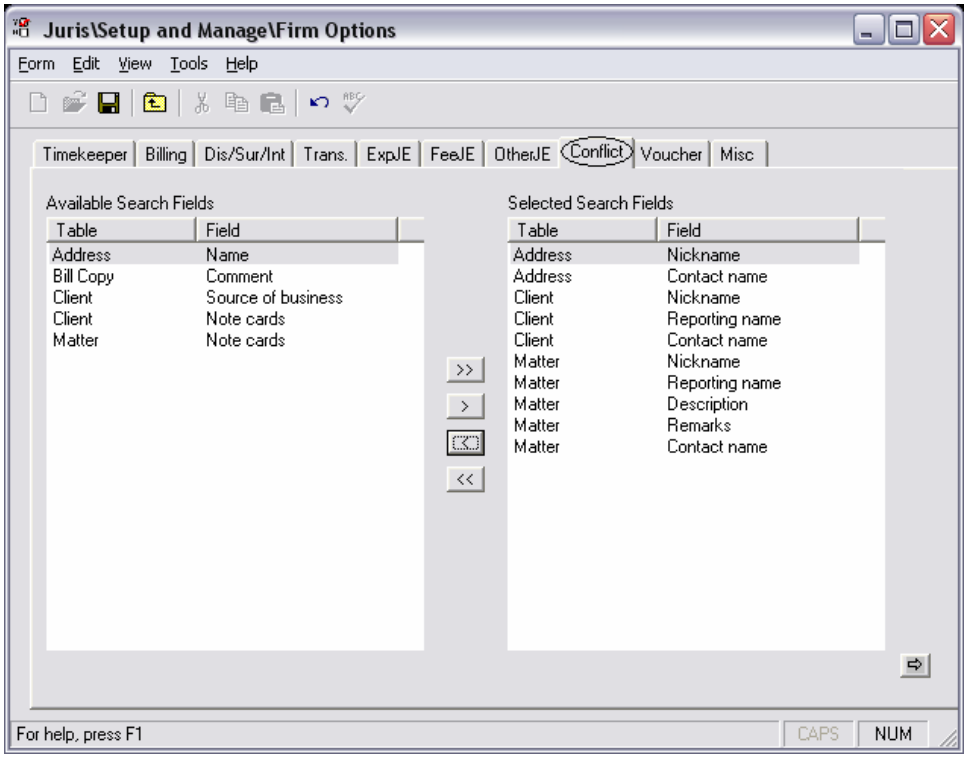
Firm Options – Fee Journal Entry Tab



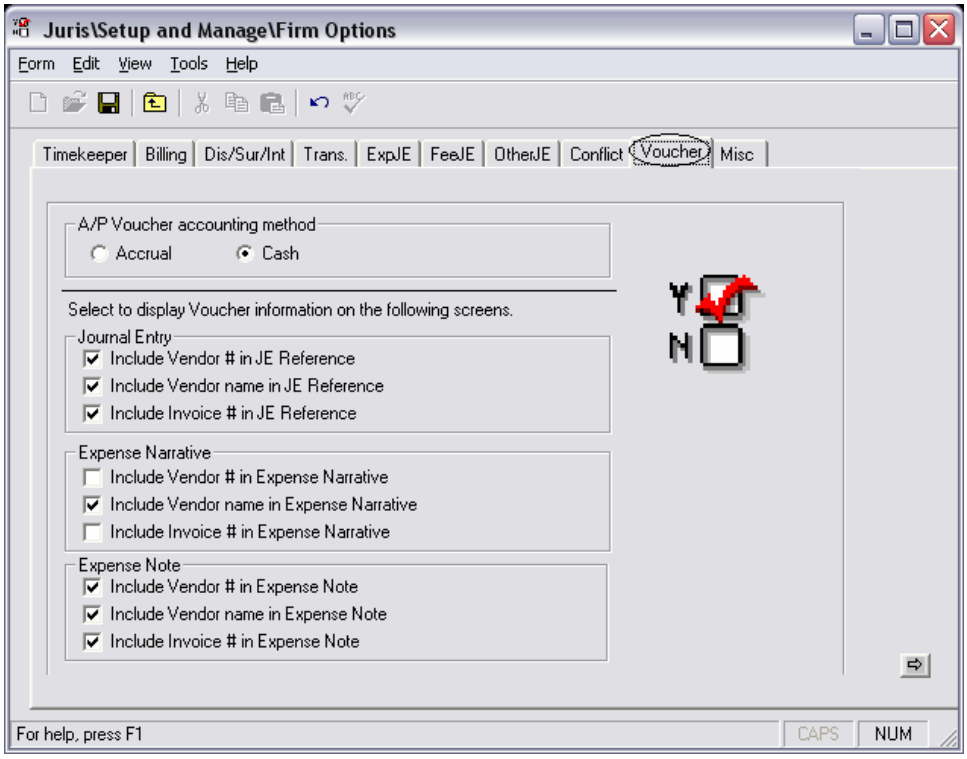
Firm Options – Other Journal Entry Tab



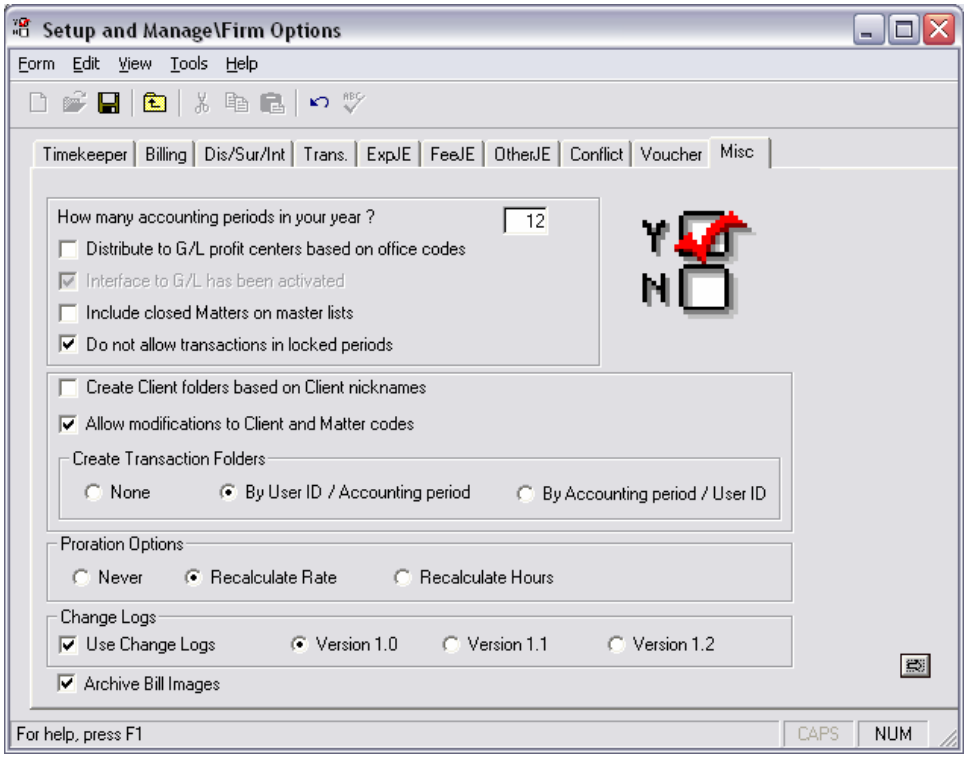
Firm Options – Conflict Tab



Firm Options – Voucher Tab



Firm Options – Miscellaneous Tab



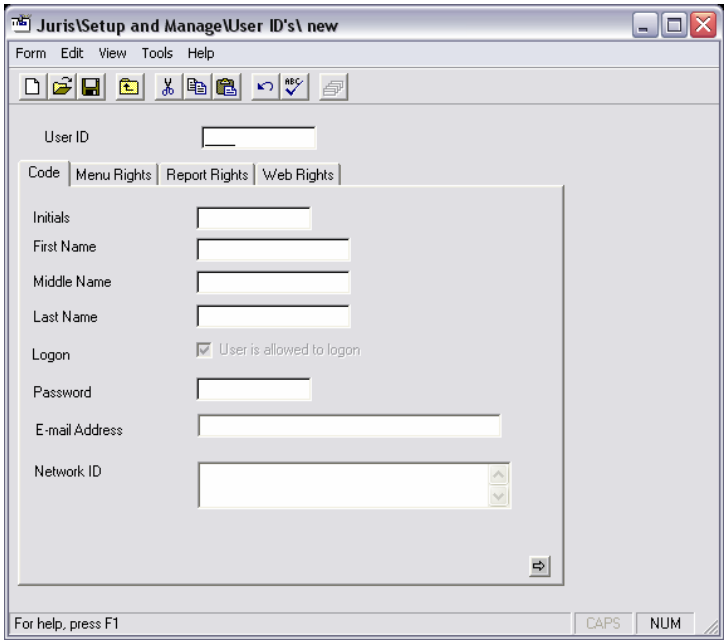
User IDs

The *User IDs* function allows the administrative users to define which areas of Juris each user should be allowed to access, as well as which reports should be available on the user's menu. The user rights may also be limited to prevent particular users from performing functions outside of the current accounting period. The options on the Web Rights tab determine the user rights available in Juris for the Web® (only for firms who have the benefit of Juris for the Web®).

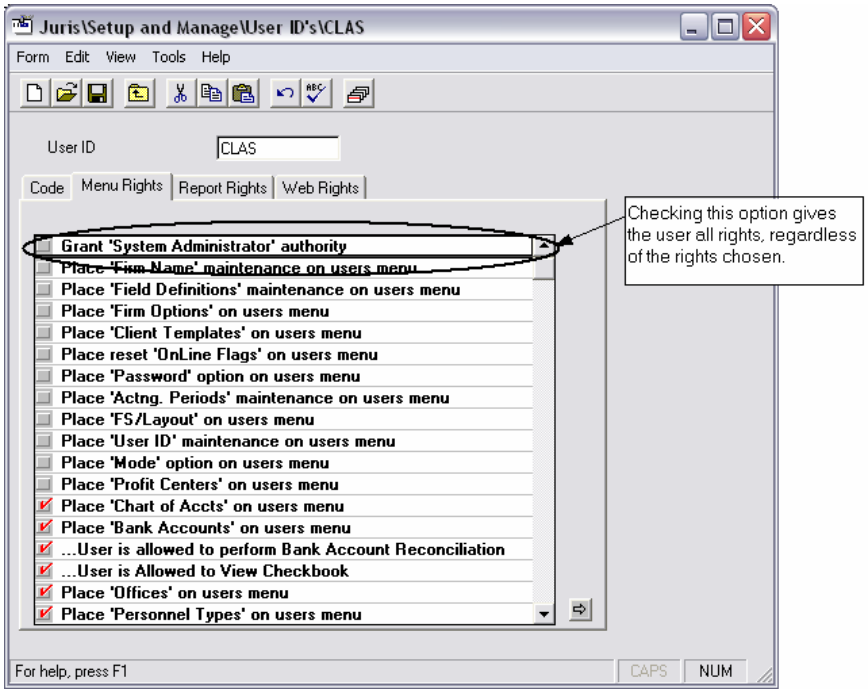
Exercise:

1. Select Setup and Manage → User ID's
2. Select *New*.
3. On the *Code* tab, enter your User ID information as instructed.
4. Review the *Menu Rights*, *Report Rights* and *Web Rights* tabs. Make changes as instructed.
5. Select *Save*, then *Form → Close.*

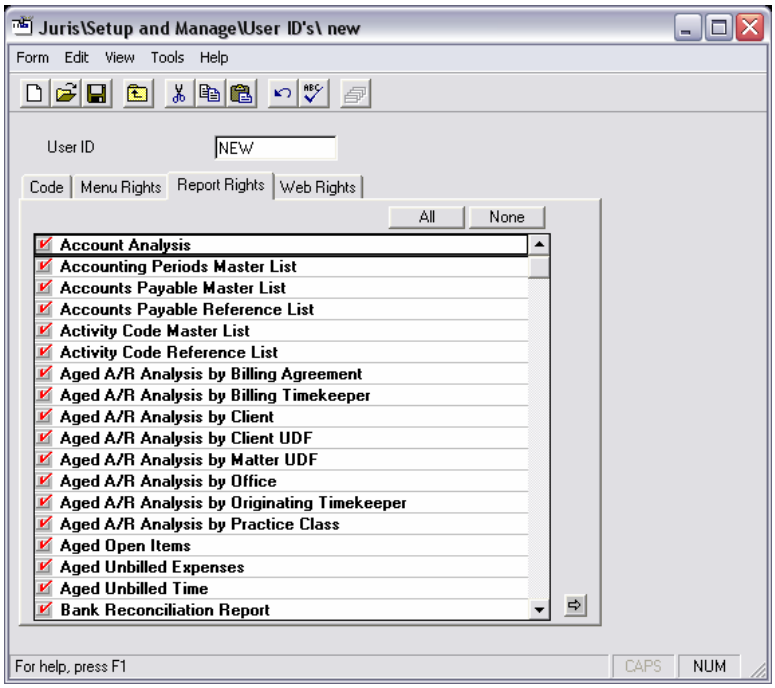
User ID's Code Tab



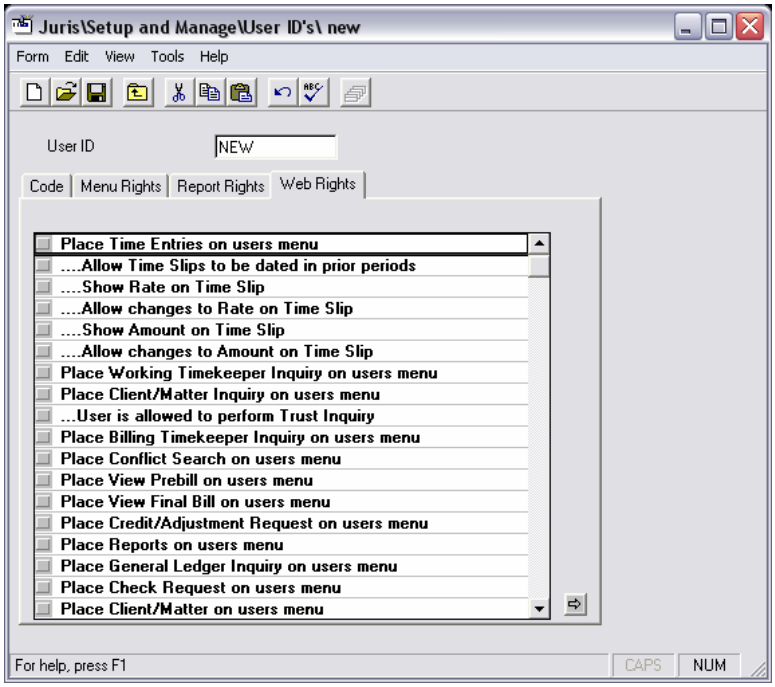
User ID's - Menu Rights Tab



User ID's - Report Rights Tab

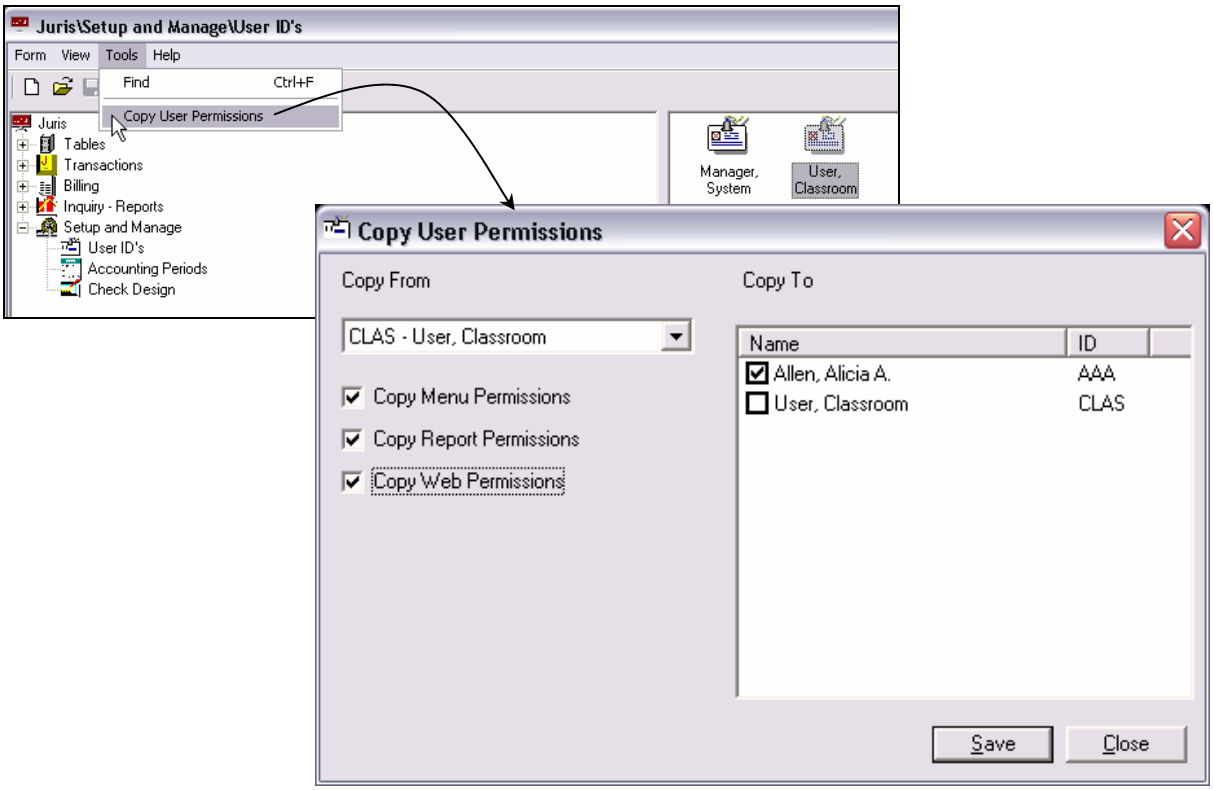


User ID's - Web Rights Tab



Copy User Permissions

The *Copy User Permissions* option allows the permission settings on one user id to be copied to another User ID.



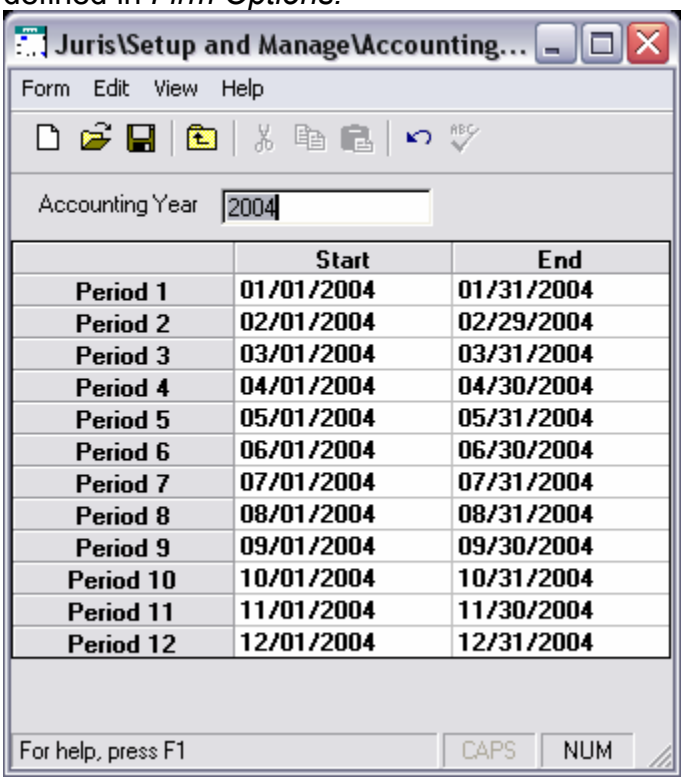
Accounting Periods

The *Accounting Periods* function allows the user to define the firm's accounting calendar based on the firm's requirements.

Exercise:

1. Open Setup and Manage → Accounting Periods
2. Review the existing accounting periods.
3. Select the New icon to create a new accounting period.

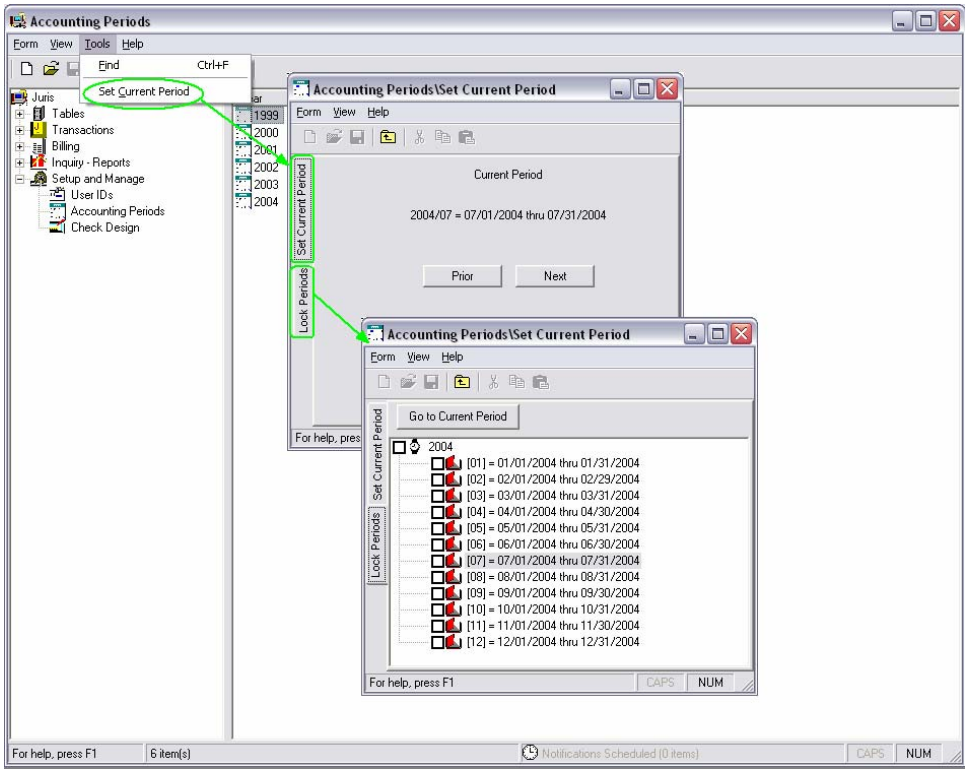
   NOTE: The number of periods created are determined by the setting as defined in *Firm Options.*



	Start	End
Period 1	01/01/2004	01/31/2004
Period 2	02/01/2004	02/29/2004
Period 3	03/01/2004	03/31/2004
Period 4	04/01/2004	04/30/2004
Period 5	05/01/2004	05/31/2004
Period 6	06/01/2004	06/30/2004
Period 7	07/01/2004	07/31/2004
Period 8	08/01/2004	08/31/2004
Period 9	09/01/2004	09/30/2004
Period 10	10/01/2004	10/31/2004
Period 11	11/01/2004	11/30/2004
Period 12	12/01/2004	12/31/2004

4. Accept the default date assignments, click the Save icon and close the form.

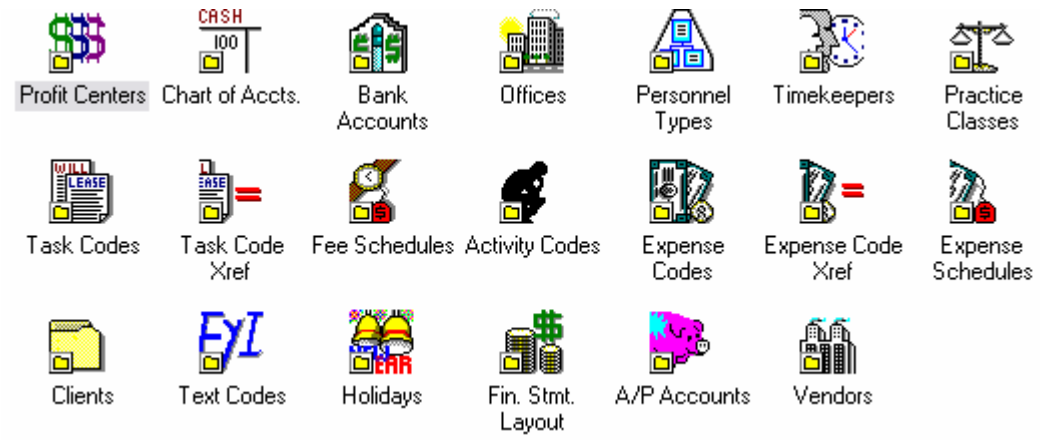
Set Current Period



Notes: This option allows the user to select the processing period for current transactions. Prior and Next buttons are provided to advance to prior or future periods. The current period setting affects various areas in Juris:

- User IDs/Menu Rights allow or disallow users from transaction processing outside of the current period. Locking a period overrides user rights.
- If the firm selects to create transaction folders in Firm Options/Misc., the transaction folders will be based on the current period.
- In Select Prebills, the bill through date of prebills will default to the end date of the current period.
- All users should exit Juris prior to changing the current period.

TABLES


Profit Centers
Chart of Accts.
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Fee Schedules
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Expense Codes
Expense Code Xref
Expense Schedules
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Text Codes
Holidays
Fin. Stmt. Layout
A/P Accounts
Vendors

Introduction

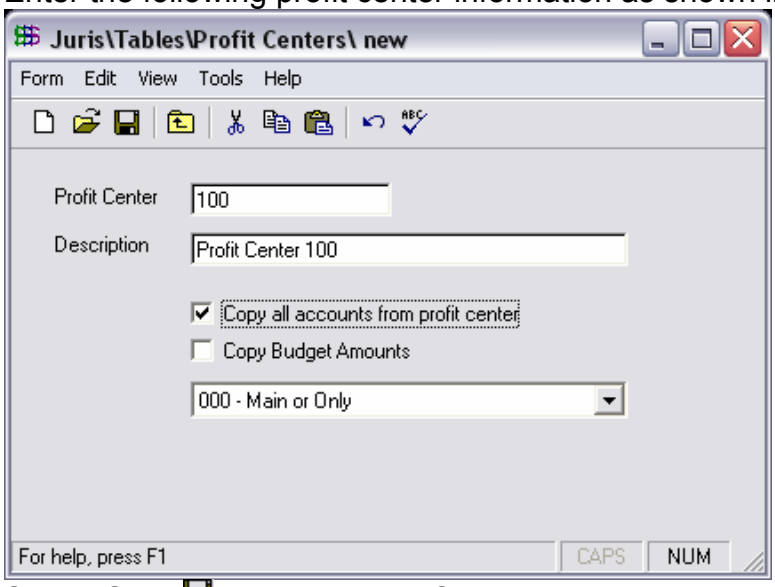
The *Tables* area of Juris allows the user to enter information for storage in the Juris database tables. Once information is entered into the Juris tables, it will be used throughout the application. This section provides exercises to familiarize you with the tables in Juris.

Profit Centers

Profit Centers may be used to classify accounting information for reporting and distribution purposes.

Exercise:

1. Select Tables → Profit Centers
2. Select *New*.
3. Enter the following profit center information as shown in the form below:



4. Select *Save*, then *Form* → *Close*.

Chart of Accounts

The *Chart of Accounts* must be established for accounting purposes.

Exercise:

1. Select Tables → Chart of Accts.
2. Open the Cash/Prepaid Asset account (1000-000) by double-clicking on the item.
3. Review the *Code*, *Comparatives* and *Budget* tabs.
4. Select *Form* → *Close*.
5. Open the Expense Income/Offset account (5000-000) by double-clicking on the item.
6. Review the *Code*, *Comparatives* and *Budget* tabs.
7. Select *Form* → *Close*.

Chart of Accounts - Code Tab

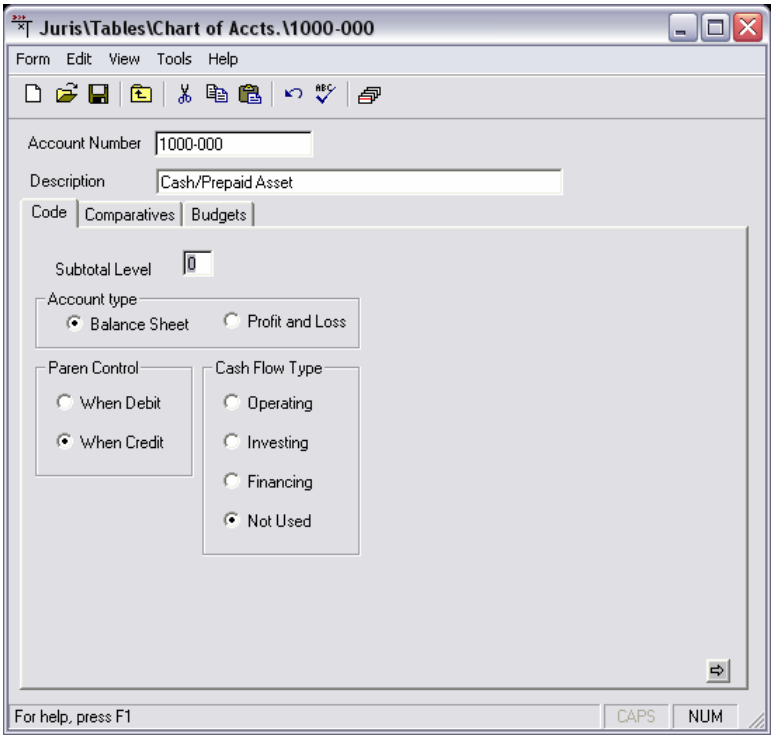


Chart of Accounts - Comparatives Tab

Juris\Tables\Chart of Accts.\1000-000

Form Edit View Tools Help

Account Number 1000-000

Description Cash/Prepaid Asset

Code | Comparatives | Budgets

Prior year beginning balance 0.00

Prior year ending balance

Period 1	0.00	Period 8	0.00
Period 2	0.00	Period 9	0.00
Period 3	0.00	Period 10	0.00
Period 4	0.00	Period 11	0.00
Period 5	0.00	Period 12	0.00
Period 6	0.00	Period 13	0.00
Period 7	0.00		

For help, press F1 CAPS NUM

Chart of Accounts - Budgets Tab

Juris\Tables\Chart of Accts.\1000-000

Form Edit View Tools Help

Account Number 1000-000

Description Cash/Prepaid Asset

Code | Comparatives | Budgets

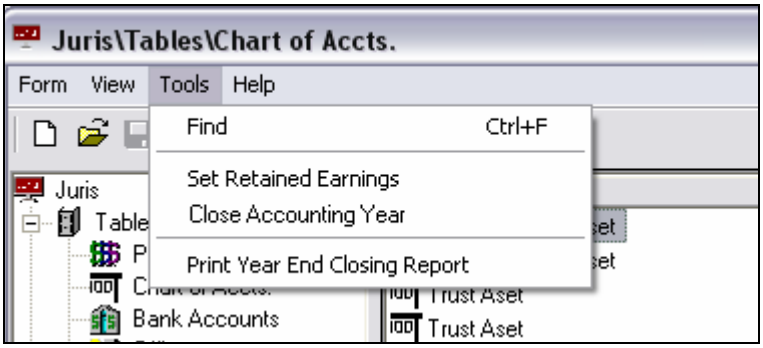
Add Percent to each period. 0.0000 %

Calculate periods based on annual budget. 0.00 C

	Budget	Comparative		Budget	Comparative
Period 1	0.00	0.00	Period 8	0.00	0.00
Period 2	0.00	0.00	Period 9	0.00	0.00
Period 3	0.00	0.00	Period 10	0.00	0.00
Period 4	0.00	0.00	Period 11	0.00	0.00
Period 5	0.00	0.00	Period 12	0.00	0.00
Period 6	0.00	0.00	Period 13	0.00	0.00
Period 7	0.00	0.00			

For help, press F1 CAPS NUM

Chart of Accounts - Tools

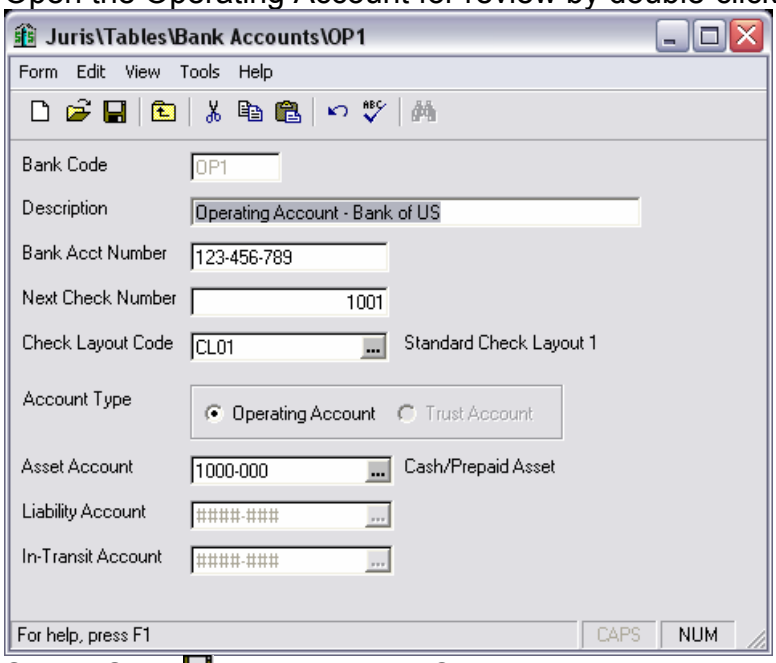


Bank Accounts

Bank Accounts may be entered to allow the Juris system to process checks and maintain reconciliation information.

Exercise:

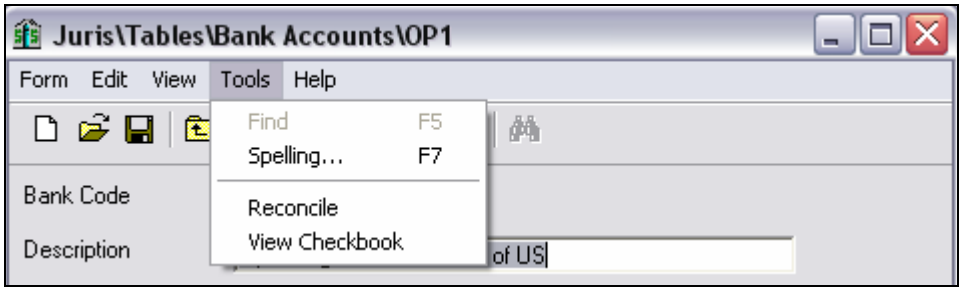
1. Select Tables → Bank Accounts
2. Open the Operating Account for review by double-clicking.



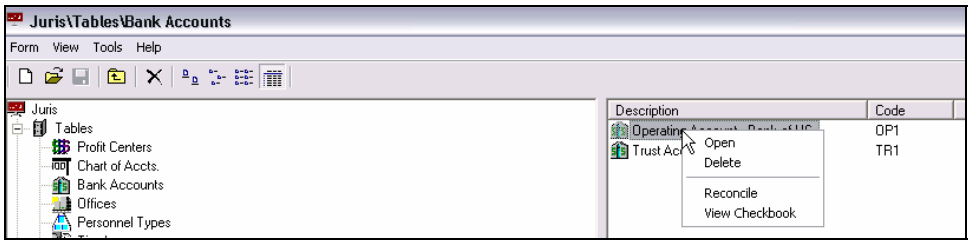
4. Select *Save*, then *Form* → *Close*.

NOTE: Return to this area after the *Transactions* section of the instruction guide is complete to view entries created by transactions.

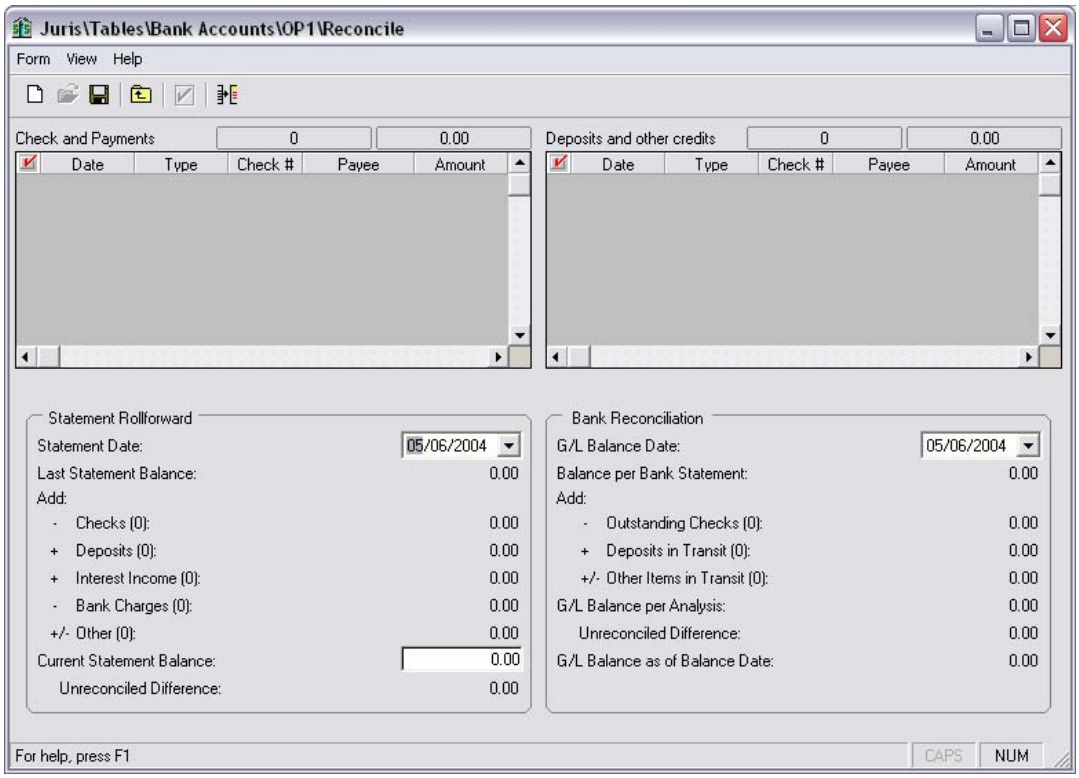
Bank Accounts – Tools



Bank Accounts – Options

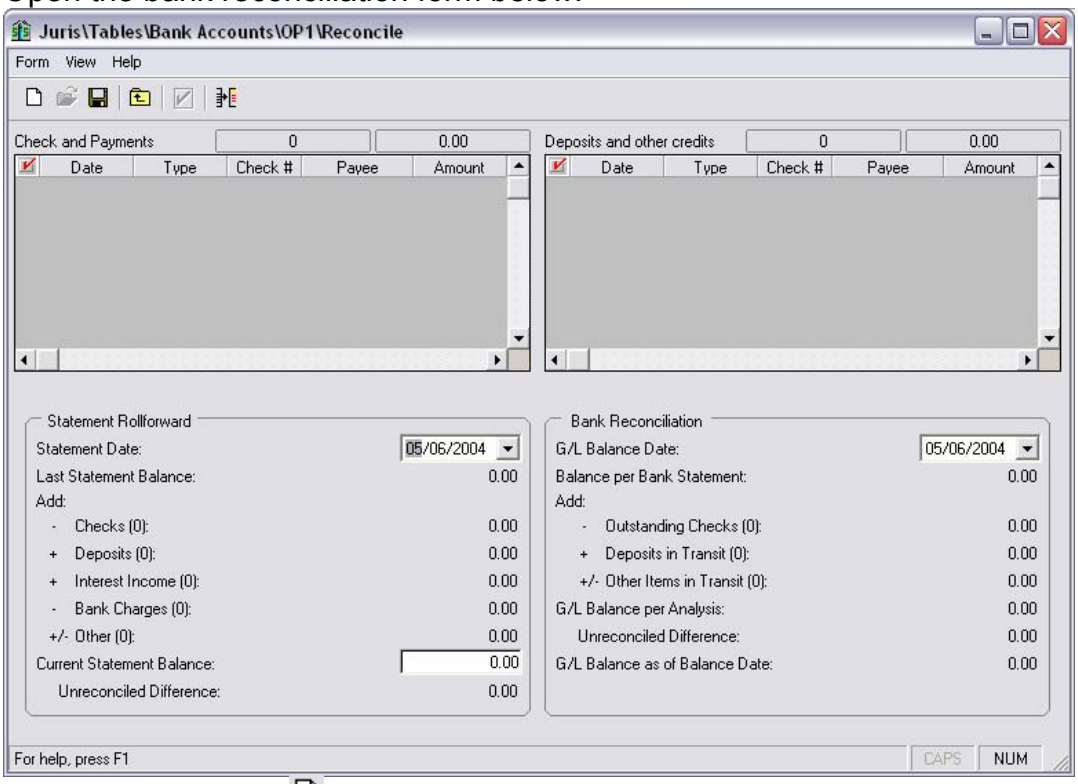


Reconcile

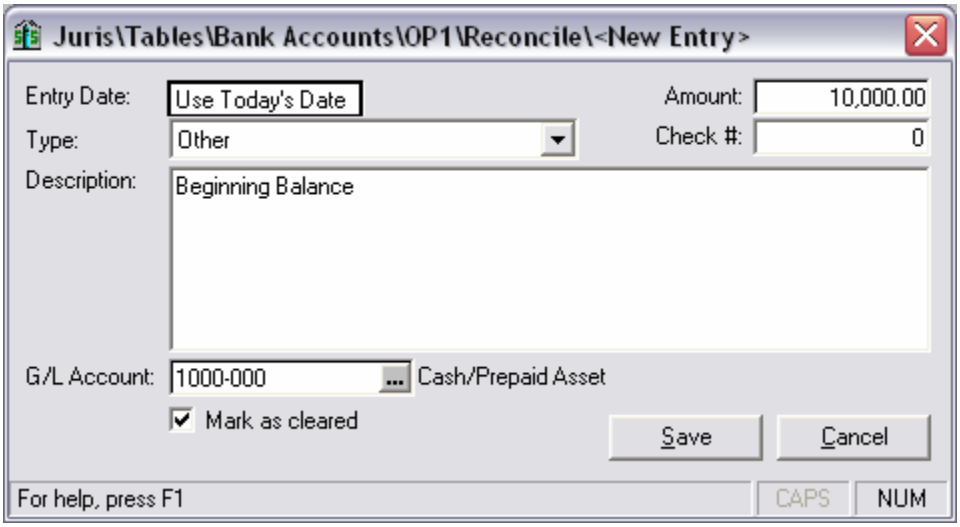


Exercise:

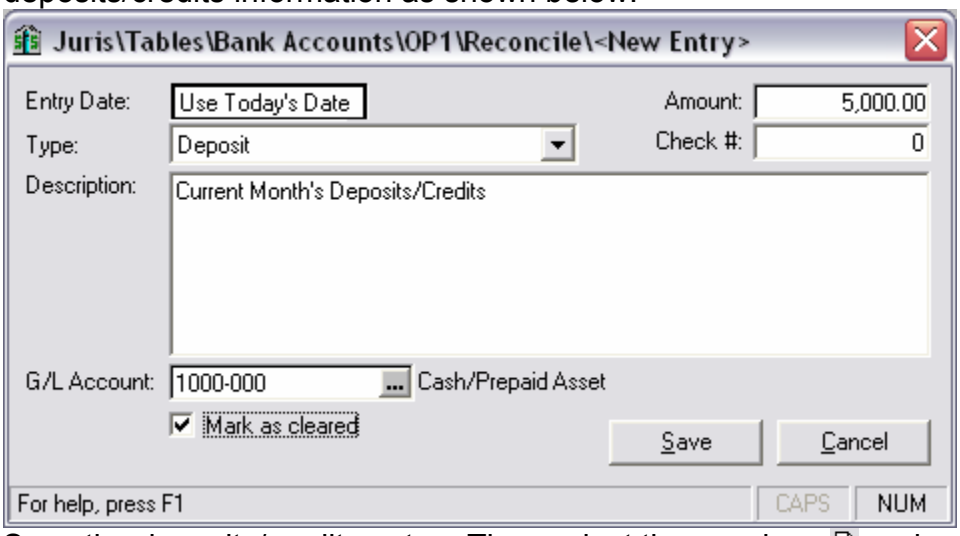
1. Open the bank reconciliation form below:



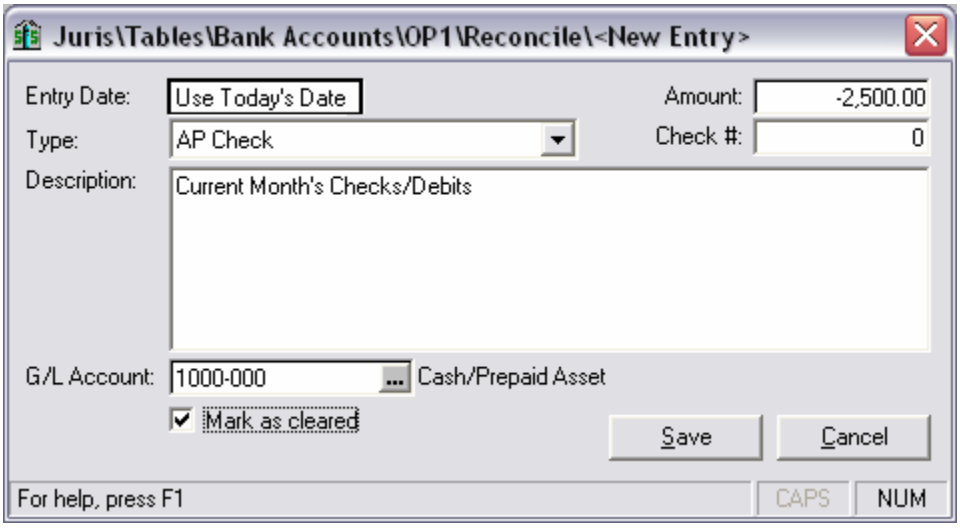
2. Select the new icon and enter the beginning balance information as shown below:



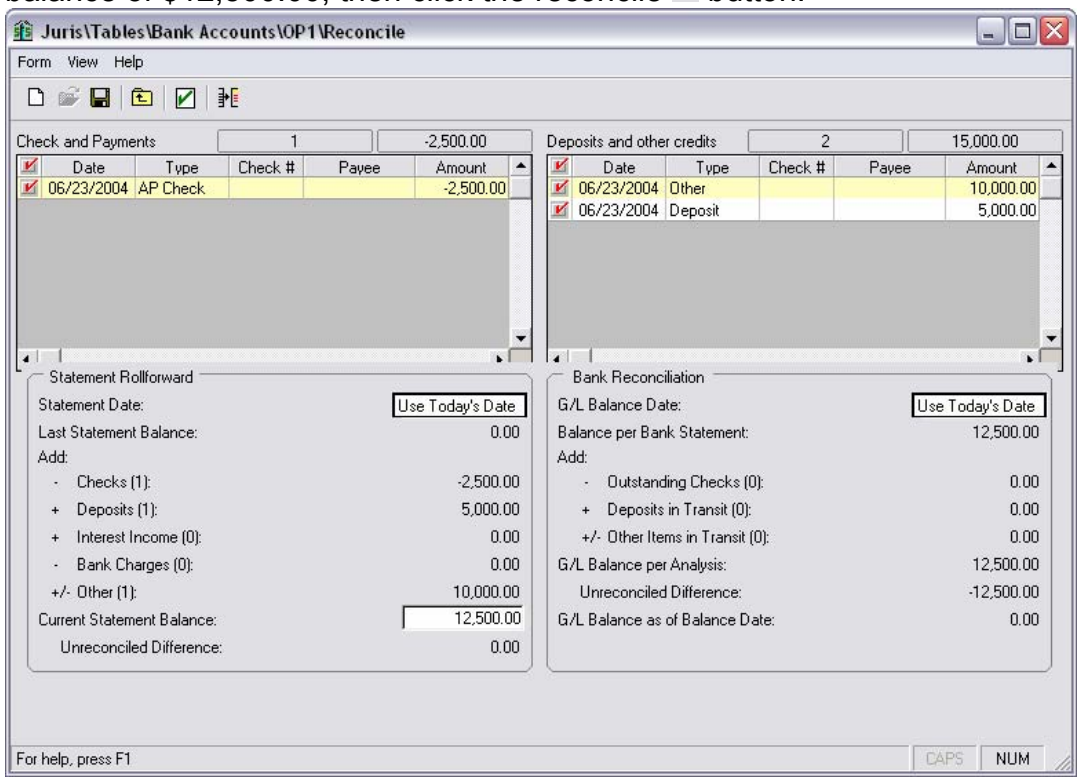
3. Save the beginning balance entry. Then select the new icon and enter the deposits/credits information as shown below:



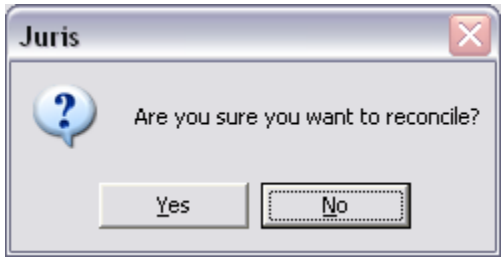
4. Save the deposits/credits entry. Then select the new icon and enter the checks/debits information as shown below:



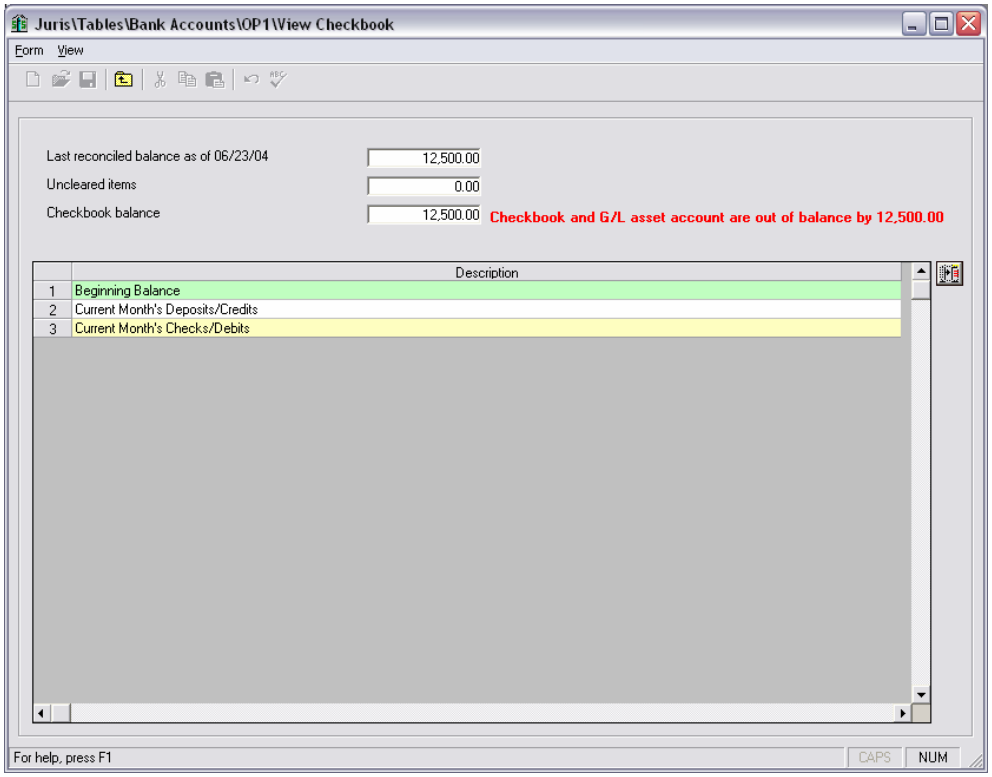
5. Make sure all items are marked as cleared, enter the Current Statement balance of $12,500.00, then click the reconcile button.



6. Click Yes to proceed with reconciliation. Then close the bank reconciliation form.



View Checkbook



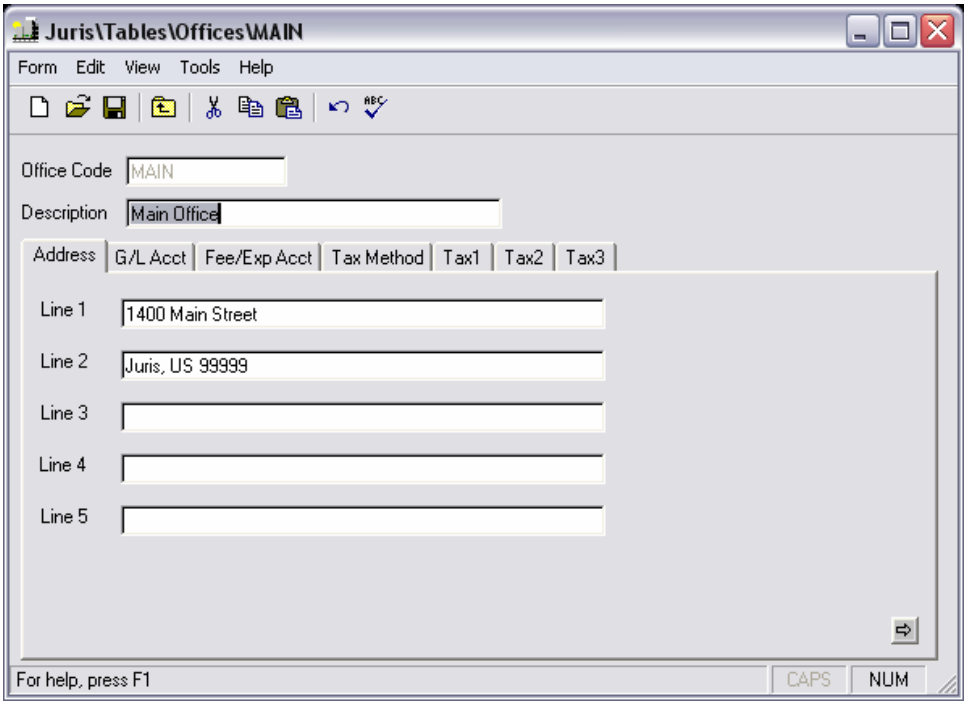
Offices

Offices may be used to differentiate between different branches of the firm, or may even be used to distinguish departments within a firm, if desired. Each office may have a separate address, apply different tax settings and use a distinct set of general ledger account numbers.

Exercise:

1. Select Tables → Offices
2. Open the Main Office for review.
3. When finished reviewing all tabs, close the form.

Offices – Address Tab



Offices – G/L Acct. Tab

Juris\Tables\Offices\MAIN

Form Edit View Tools Help

Office Code MAIN

Description Main Office

Address | G/L Acct | Fee/Exp Acct | Tax Method | Tax1 | Tax2 | Tax3

Bank Code	OP1_	Operating Account - Bank of US
Profit Center		
PPD Asset	1000-000	Cash/Prepaid Asset
PPD Liability	2100-000	Prepaid Liability
Interest Income	4100-000	Interest Income
Interest A/R	####-###	
Surcharge Income	4120-000	Surcharge Income
Surcharge A/R	####-###	

For help, press F1 CAPS NUM

Offices – Fee/Exp Acct. Tab

Juris\Tables\Offices\MAIN

Form Edit View Tools Help

Office Code MAIN

Description Main Office

Address | G/L Acct | Fee/Exp Acct | Tax Method | Tax1 | Tax2 | Tax3

Expense

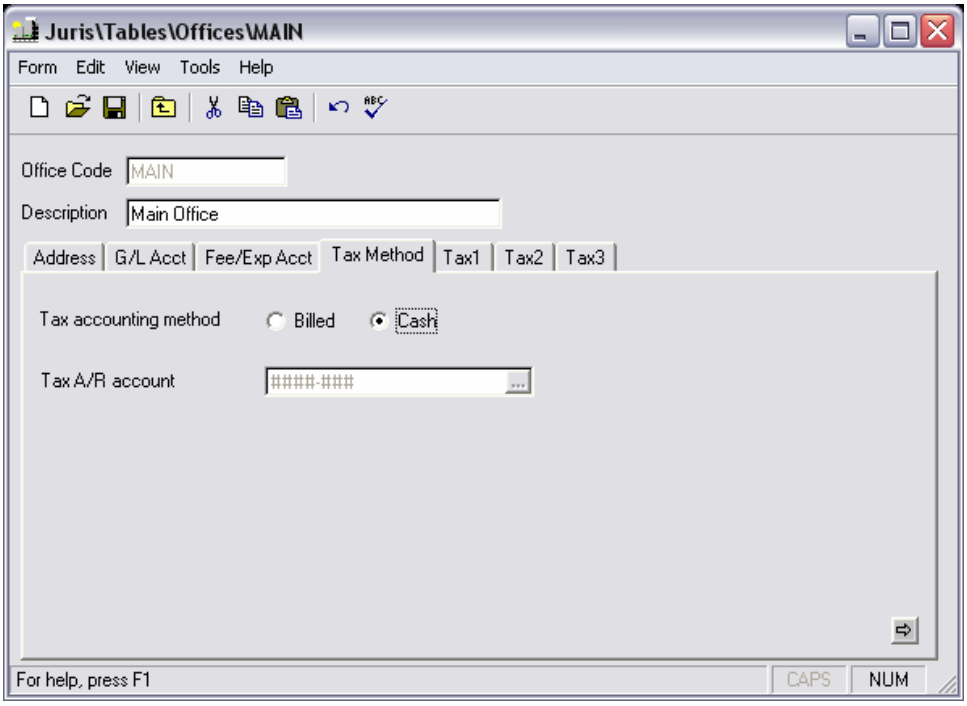
Cash Expense Income Account	####-###	
Noncash Expense Income Account	####-###	
Unbilled Account	1310-000	Unbilled Expenses
A/R Account	1350-000	A/R Expenses

Fee

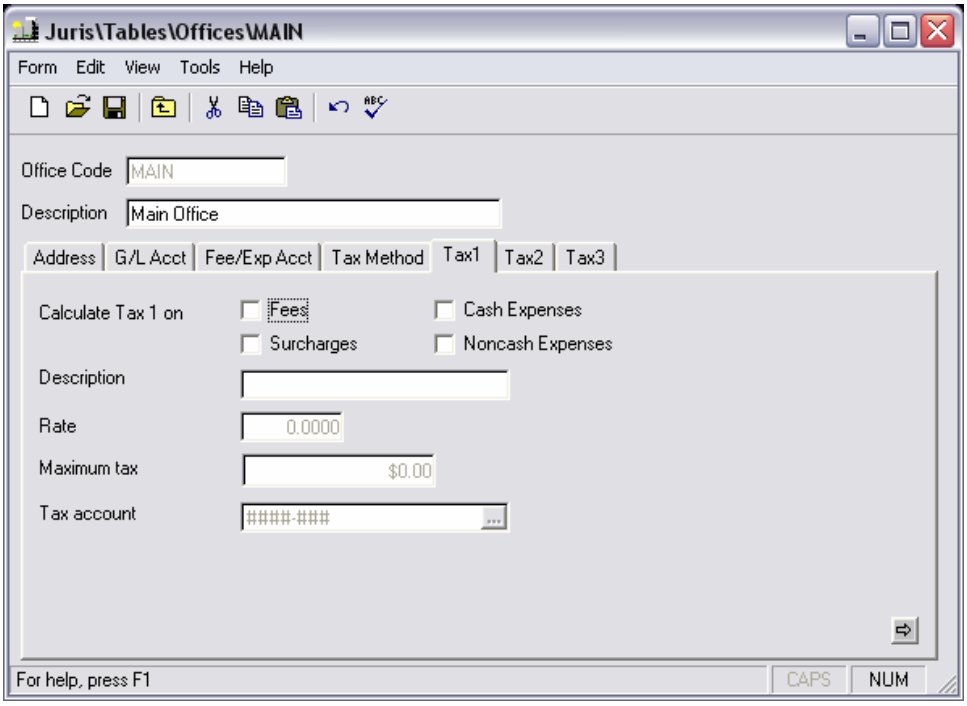
Income Account	####-###
Unbilled Account	####-###
A/R Account	####-###

For help, press F1 CAPS NUM

Offices – Tax Method Tab



Offices – Tax Tab(s)



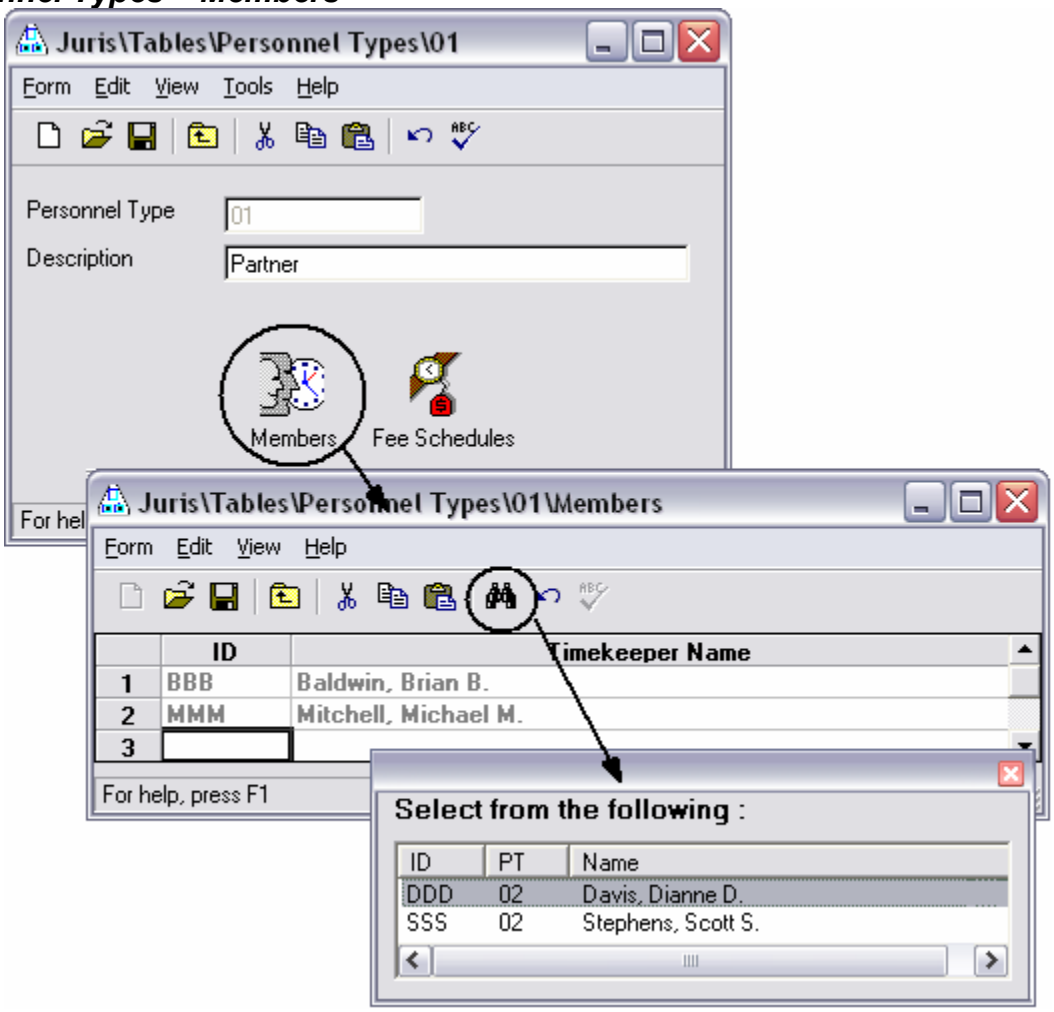
Personnel Types

Personnel Types may be used to classify personnel in a firm based on rank or category.

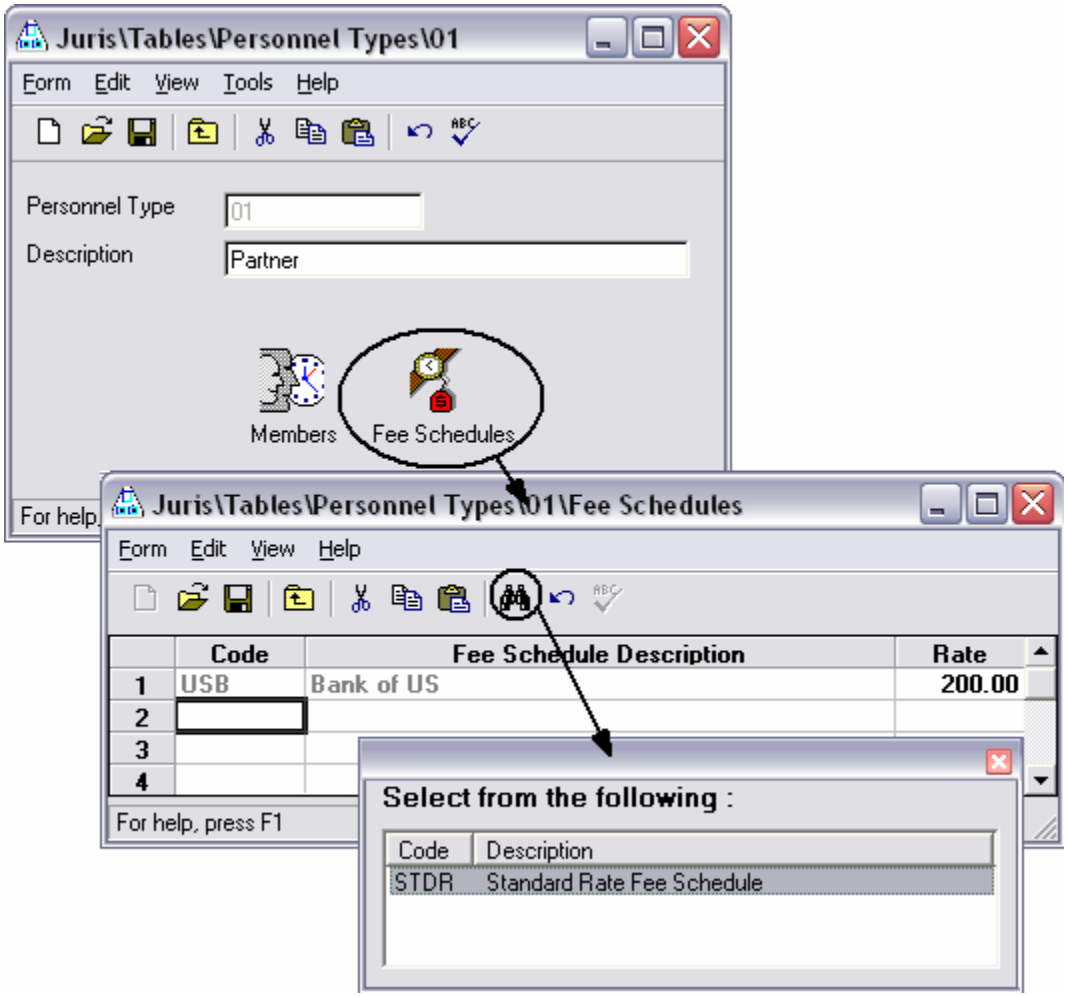
Exercise:

1. Select Tables → Personnel Types
2. Open the *Partner* personnel type for review. Make sure to select the *Members* and *Fee Schedules* item for review as well.
3. Then exit the *Personnel Types* form.

Personnel Types – Members



Personnel Types – Fee Schedules

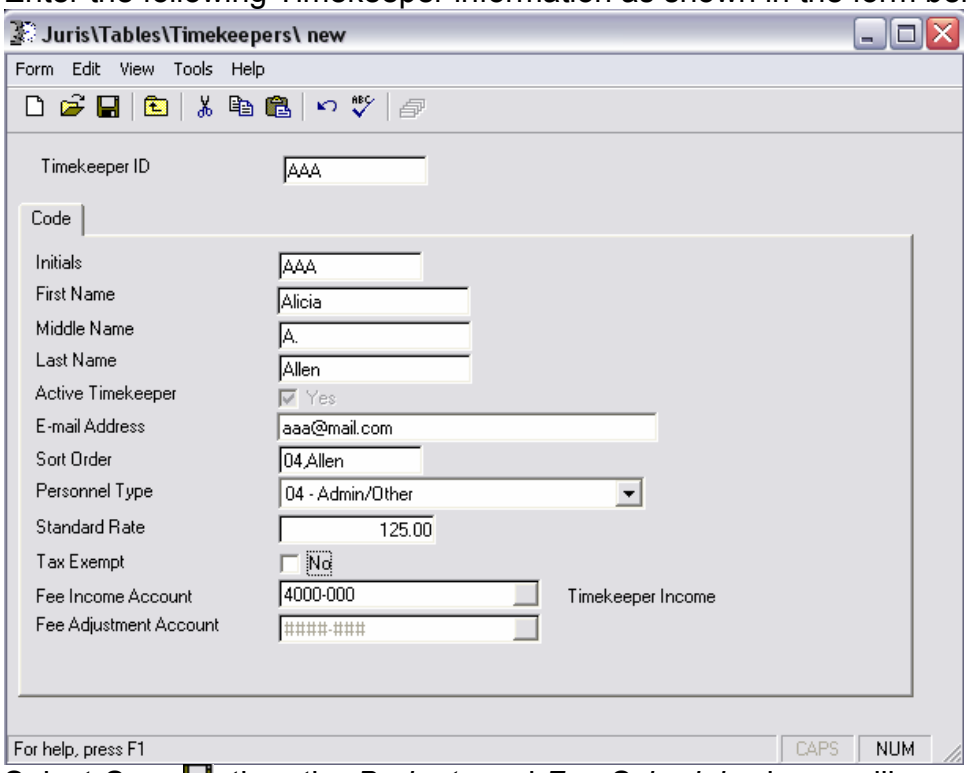


Timekeepers

Timekeepers are employees that track and bill their worked time. An employee may be both a user and a timekeeper, but a timekeeper is not necessarily a Juris user (i.e. employees are not required to have a Juris user ID in order to be entered as a timekeeper in the Juris system).

Exercise:

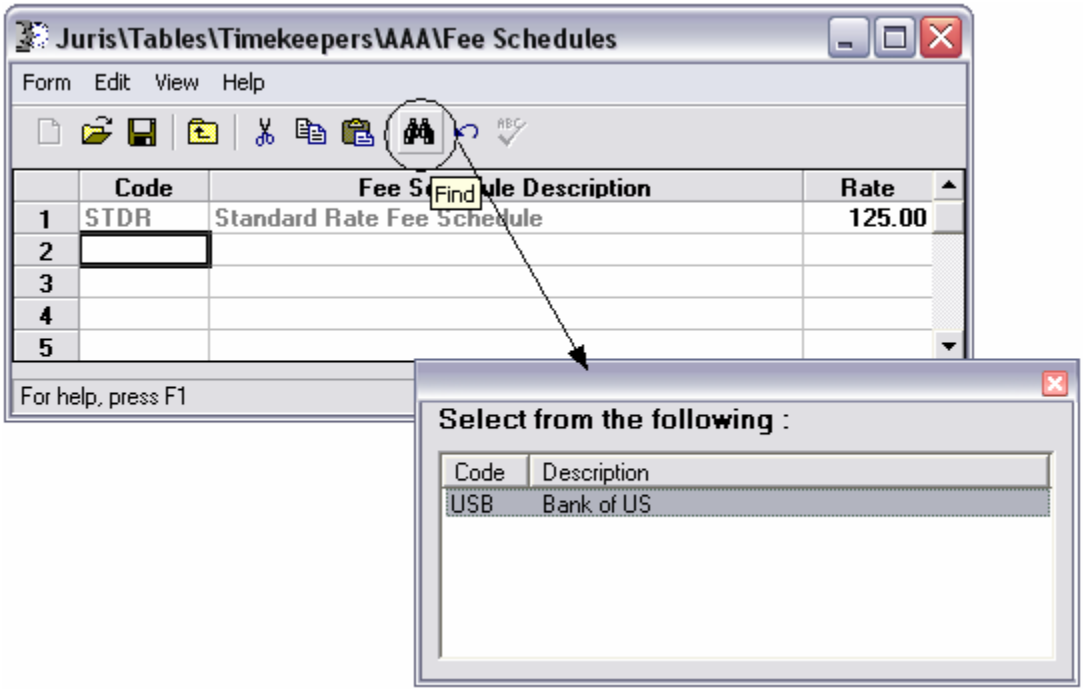
1. Select Tables → Timekeepers
2. Select *New*.
3. Enter the following Timekeeper information as shown in the form below:



4. Select *Save*, then the *Budgets* and *Fee Schedules* icons will appear.

5. Select the *Budgets* icon for review only. Select *Form* → *Close* when finished. [See topic "Timekeeper Budgets" in "Other" section for more details]
6. Select the *Fee Schedules* icon for review only. Select *Form* → *Close* when finished.
7. Select *Form* → *Close* to exit the Timekeeper form.

Timekeepers – Fee Schedules

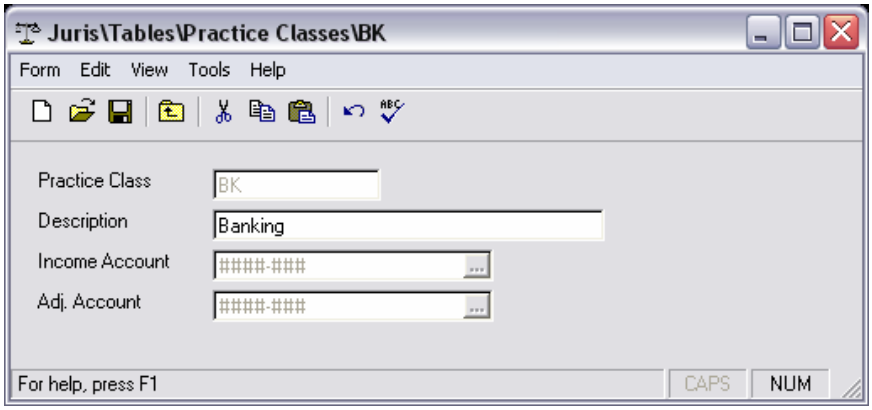


Practice Classes

Practice Classes may be used to differentiate between different types of work performed by the attorneys at a firm. Once a *Practice Class* is defined, it may be assigned to Clients and/or Matters to classify the type of work the firm was hired to perform for that Client and Matter.

Exercise:

1. Select Tables → Practice Classes
2. Double-click the *Banking* practice class and review the information as shown in the form below:

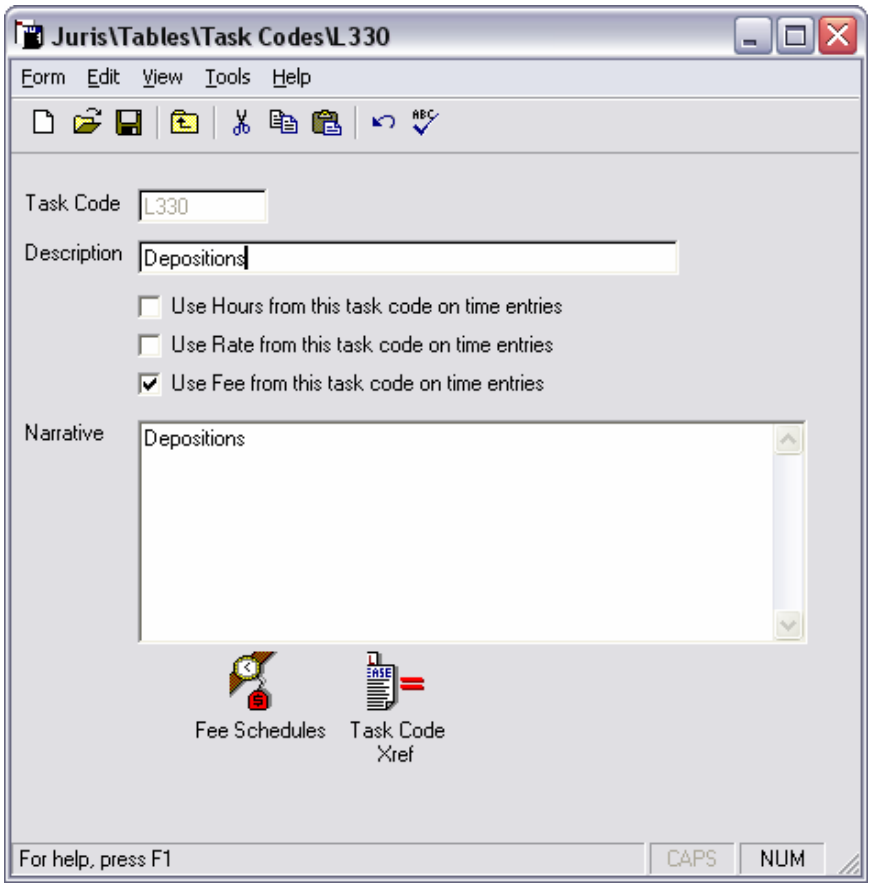


3. When finished with review, close the form.

Task Codes

Exercise:

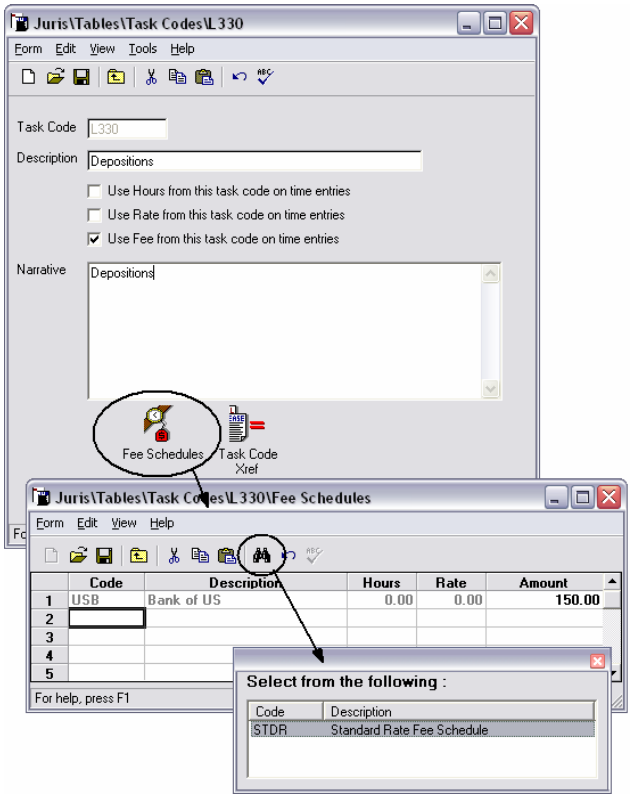
1. Select Tables → Task Codes
2. Double-click on task *L330 – Depositions* and review the task code information as shown in the form below:



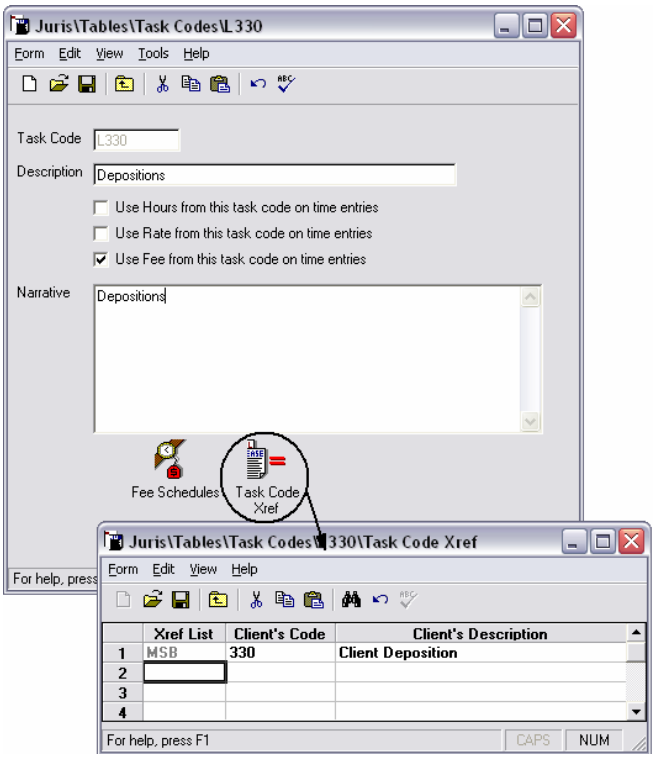
4. Review the the *Fee Schedules* and *Task Code Xref* forms as well.

5. When finished reviewing, close the forms.

Task Codes – Fee Schedules



Task Codes – Task Code Xref

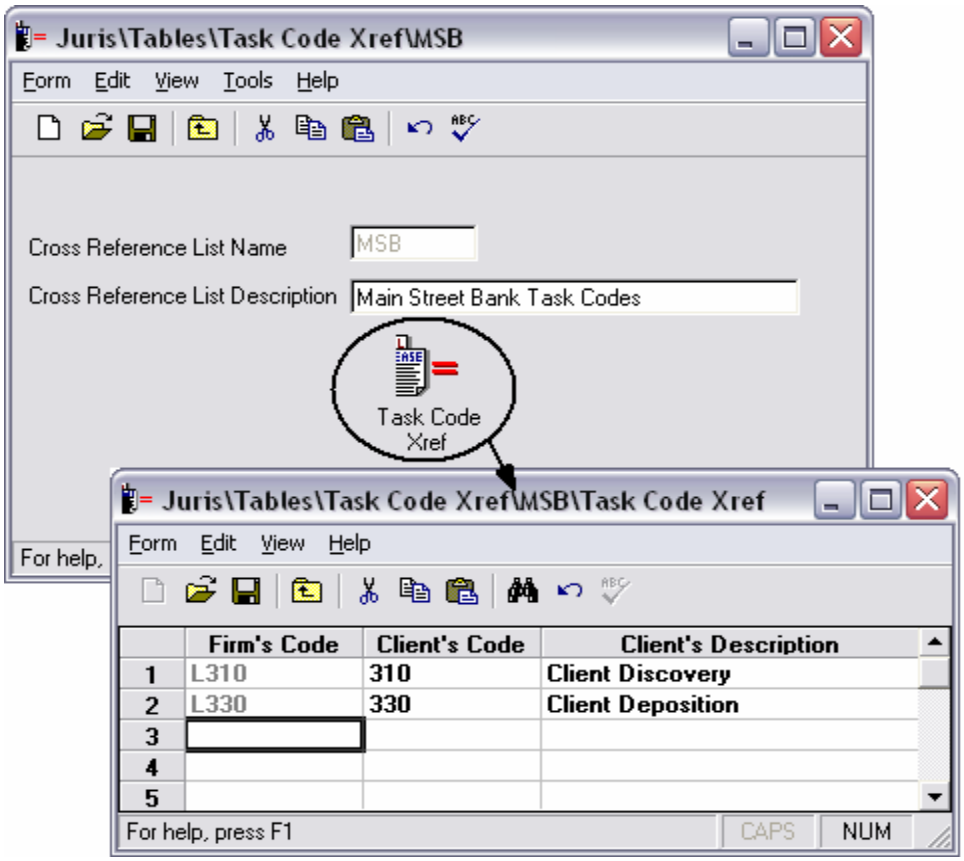


Task Code Xref (Cross Reference)

The *Task Code Xref* (Cross Reference) may be used when a client prefers to see their own specific task codes on their bills. If the client's codes are not the same as the firm's internal system for task codes, the task code xref will map the firm's code to the client's code and description. This allows time and expenses to be entered into Juris using the firm's normal task codes, yet the cross-referenced code may be placed on the client's bill for their convenience.

Exercise:

1. Select Tables → Task Code Xref
2. Double-click the MSB cross-reference to open for review. Make sure to also select the *Task Code Xref* form for review as shown below.



4. Close the forms when finished reviewing.

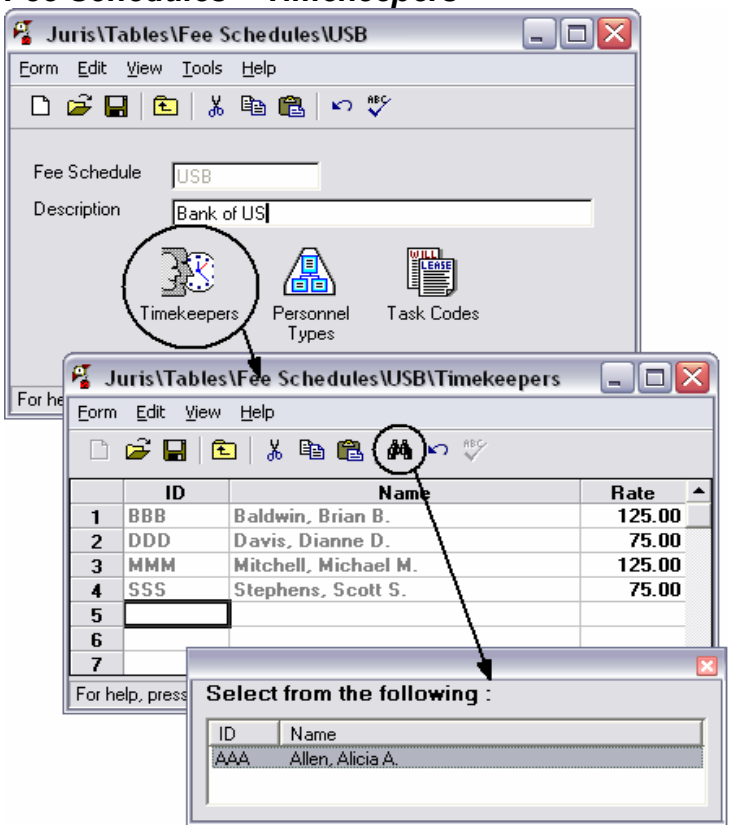
Fee Schedules

Fee Schedules may be used to establish specific fees that differ from the standard fees charged by the firm. For example, a client with whom the firm works with on a regular basis or through which a large volume of business is generated may be charged a lower rate than the standard rate. A particularly difficult or high-risk client may be charged at a rate that is higher than the standard rate. In these instances, the firm may wish to establish specific fee schedules in order to easily charge the appropriate rates.

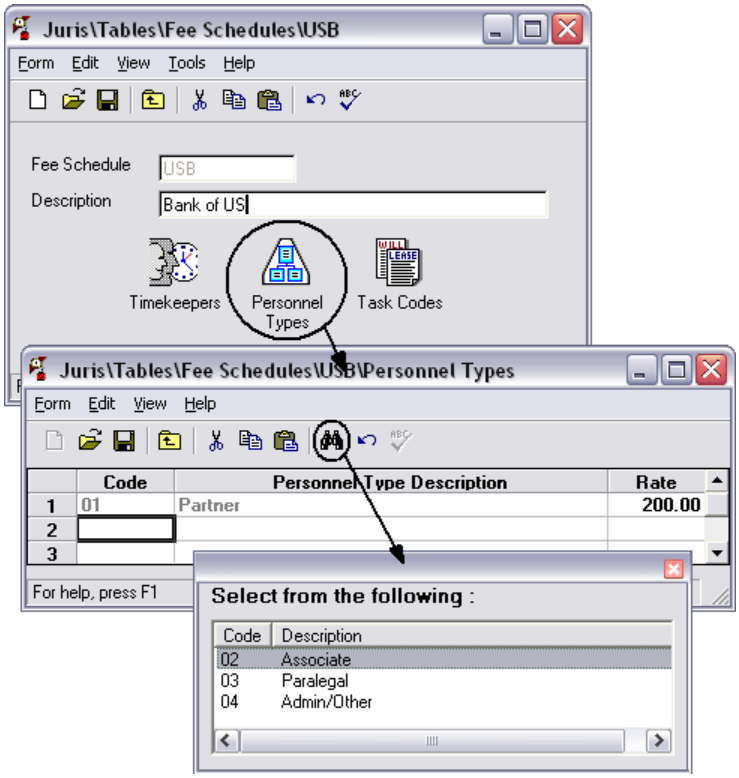
Exercise:

1. Select Tables → Fee Schedules
2. Select the *Bank of US* fee schedule for review. Review the Fee Schedule as well as the *Timekeepers, Personnel Types* and *Task Codes* icons.
3. Close the forms when finished reviewing the details.

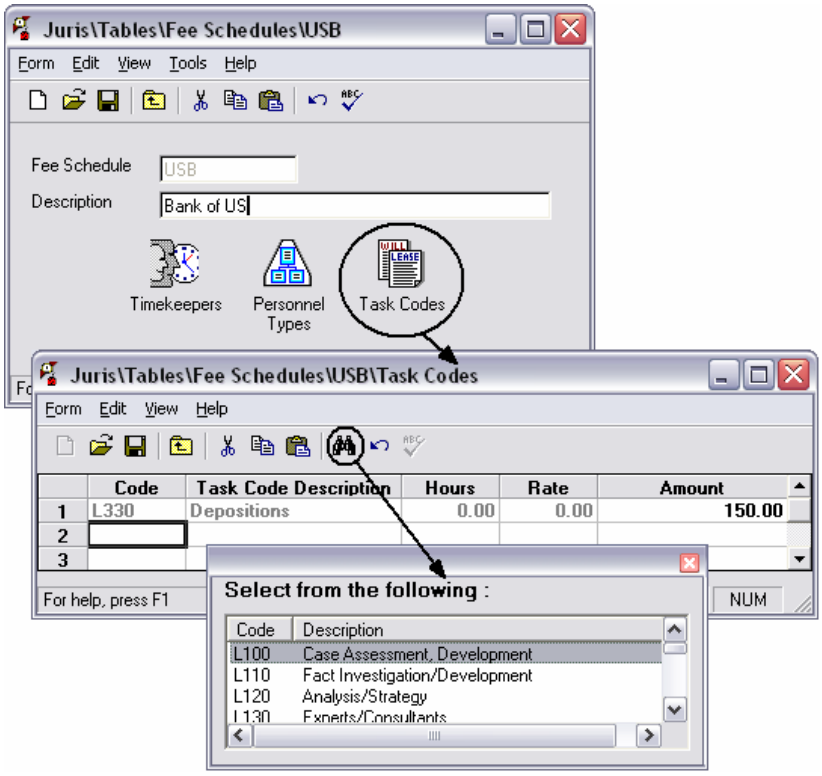
Fee Schedules – Timekeepers



Fee Schedules – Personnel Types

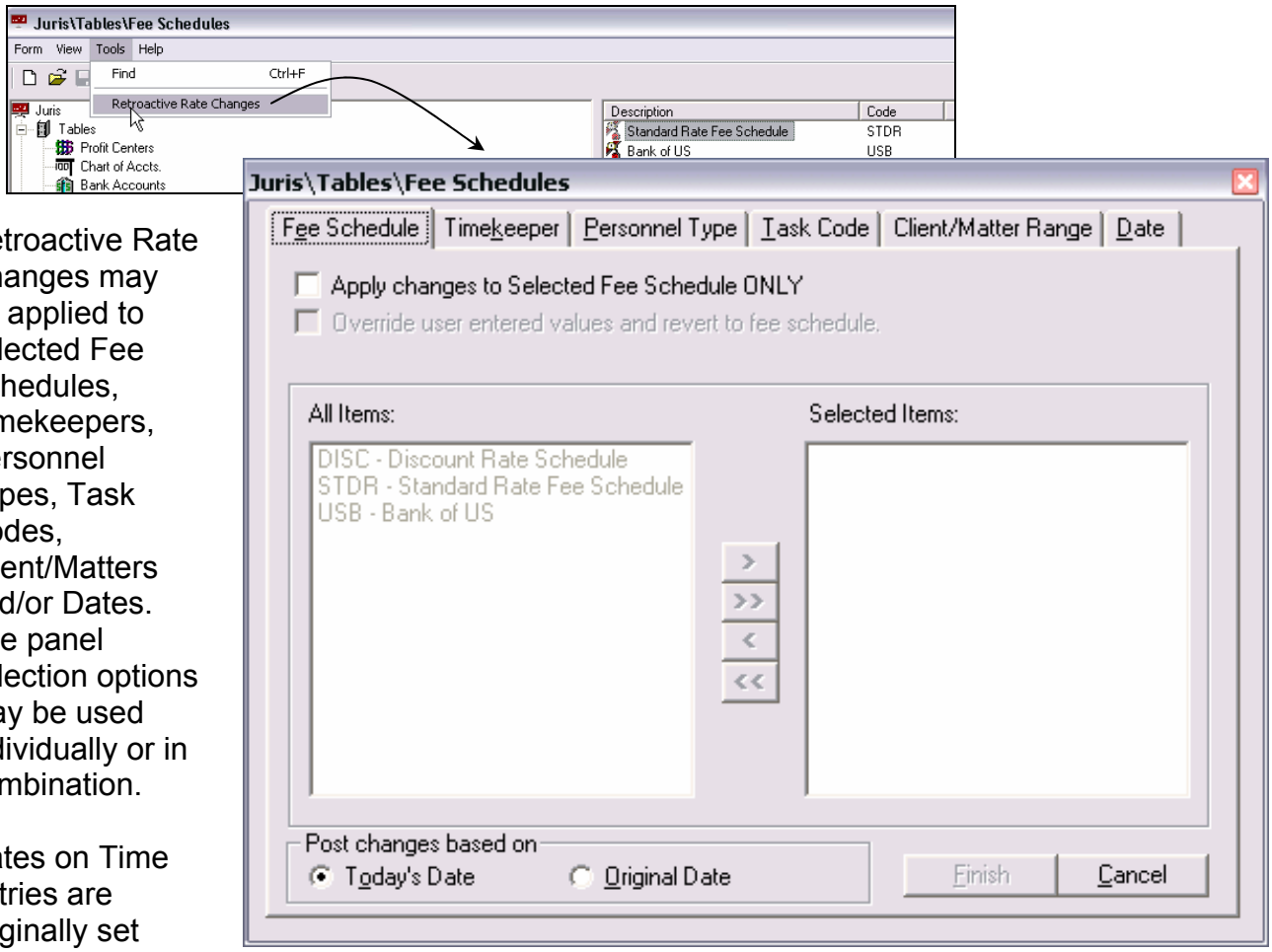


Fee Schedules – Task Codes



Retroactive Rate Change

The *Retroactive Rate Change* panels allow you to apply changes to selected Fee Schedules and override user entered values on unbilled Time Entries by changing to the new Fee Schedule Rates.



Retroactive Rate Changes may be applied to selected Fee Schedules, Timekeepers, Personnel Types, Task Codes, Client/Matters and/or Dates. The panel selection options may be used individually or in combination.

Rates on Time entries are originally set when the Time entry is posted. These rates are assigned through Fee Schedules and may consist of Timekeeper rates, Personnel Type rates or Task Code rates.

- If you select the Timekeeper panel and select a Timekeeper, only those entries for the Timekeeper, whose rates were originally set by use of a Fee Schedule/Timekeeper rate, will be changed.
- If you select the Personnel Type panel and select a Personnel Type, only those entries for Timekeepers who belong to the Personnel Type, whose rates were originally set by use of a Fee Schedule/Personnel Type rate, will be changed.

- If you select the Task Code panel and select a Task Code, only those entries for the Task Code, whose rates were originally set by use of a Fee Schedule/Task Code rate, will be changed.

If you manually overrode the rate of a Time entry, the entry will not be changed unless you choose the 'Override user entered values and revert to fee schedule' option located on the Fee Schedule panel.

Notes:

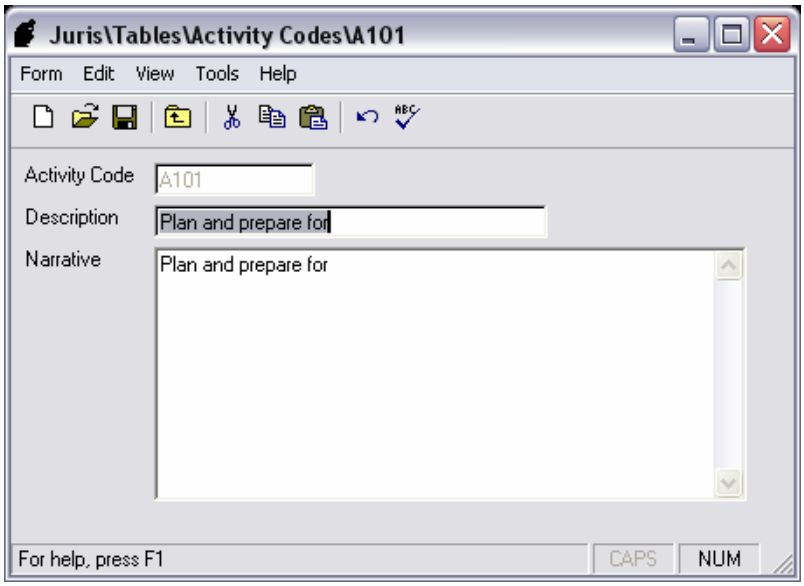
- You must change to Maintenance Mode in order to perform Retroactive Rate Changes.
- Since Retroactive Rate Changes do constitute Adjustments to Time Entries, a decision may be made to post the changes based on Today's Date or Original. Time Adjustment batches containing these changes will be created.
- If an entry exists on a Prebill, the entry will be removed from the Prebill and the 'Ready to' status of the Prebill is set to 'Ready to Edit'. You may choose 'Select Prebills' to recreate the Prebill to include the removed entry.

Activity Codes

Activity Codes may be used on time entries when a firm would like to define specific activity types that may be performed for a client. The *Activity Codes* may be used alone or in conjunction with *Task Codes*.

Exercise:

1. Select Tables → Activity Codes
2. Select code A101 for review.



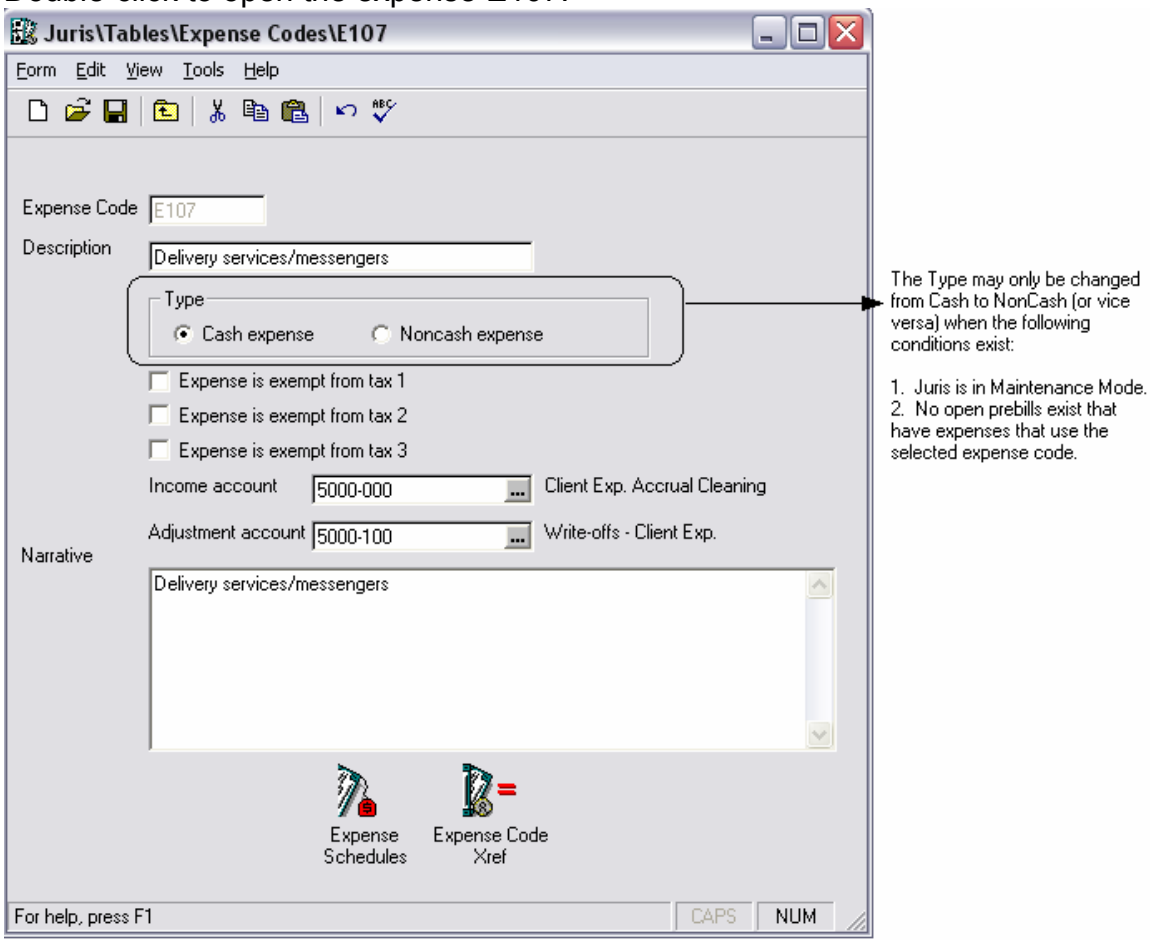
3. Close the form when finished reviewing the details.

Expense Codes

Expense Codes may be used on expense entries when a firm would like to define specific expense types that may be charged to a client. The *Expense Codes* may represent cash expenses (such as deposition fees) or noncash expenses (such as local faxes sent from a firm-owned fax machine).

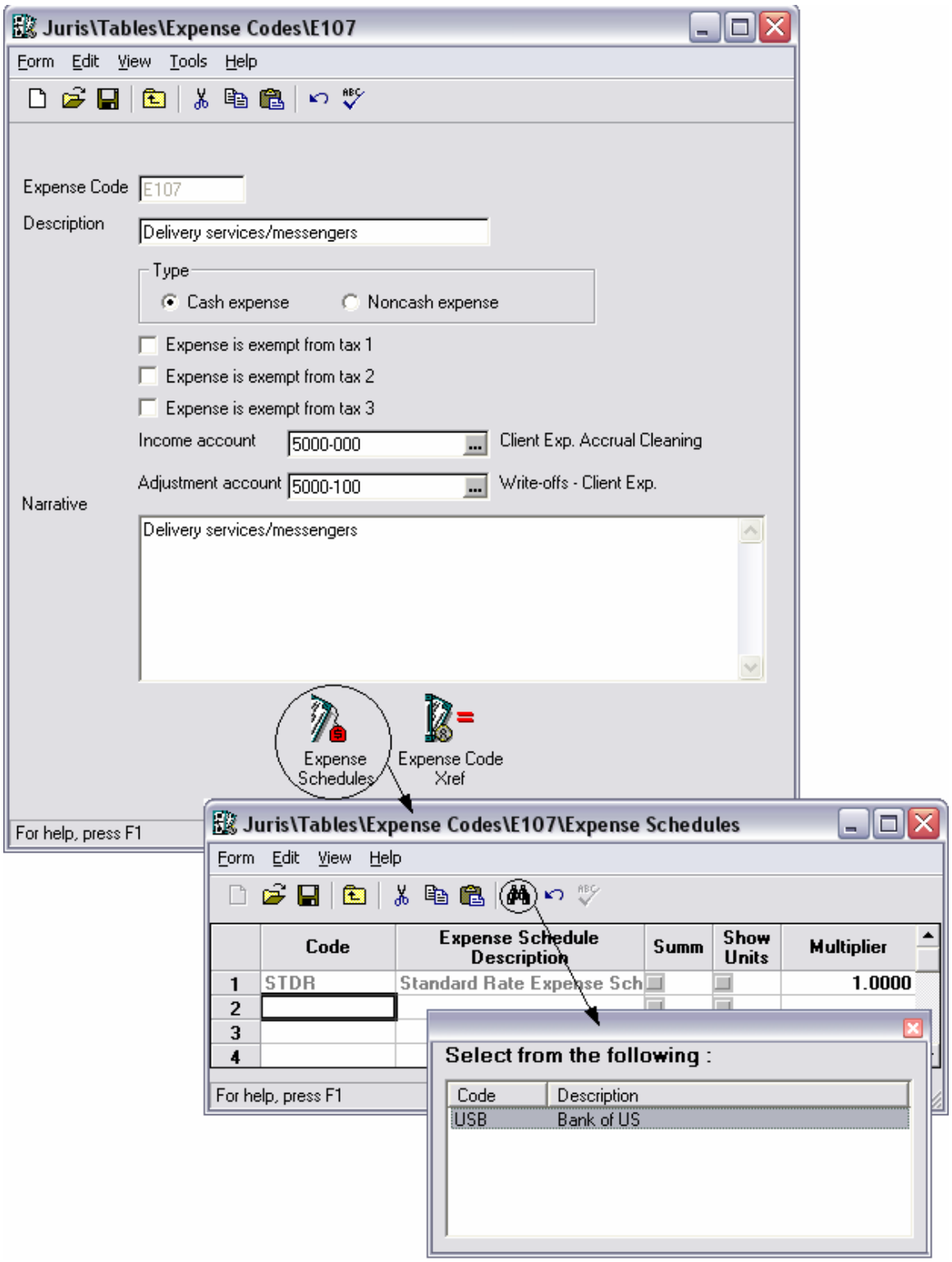
Exercise:

1. Select Tables → Expense Codes
2. Double-click to open the expense E107.

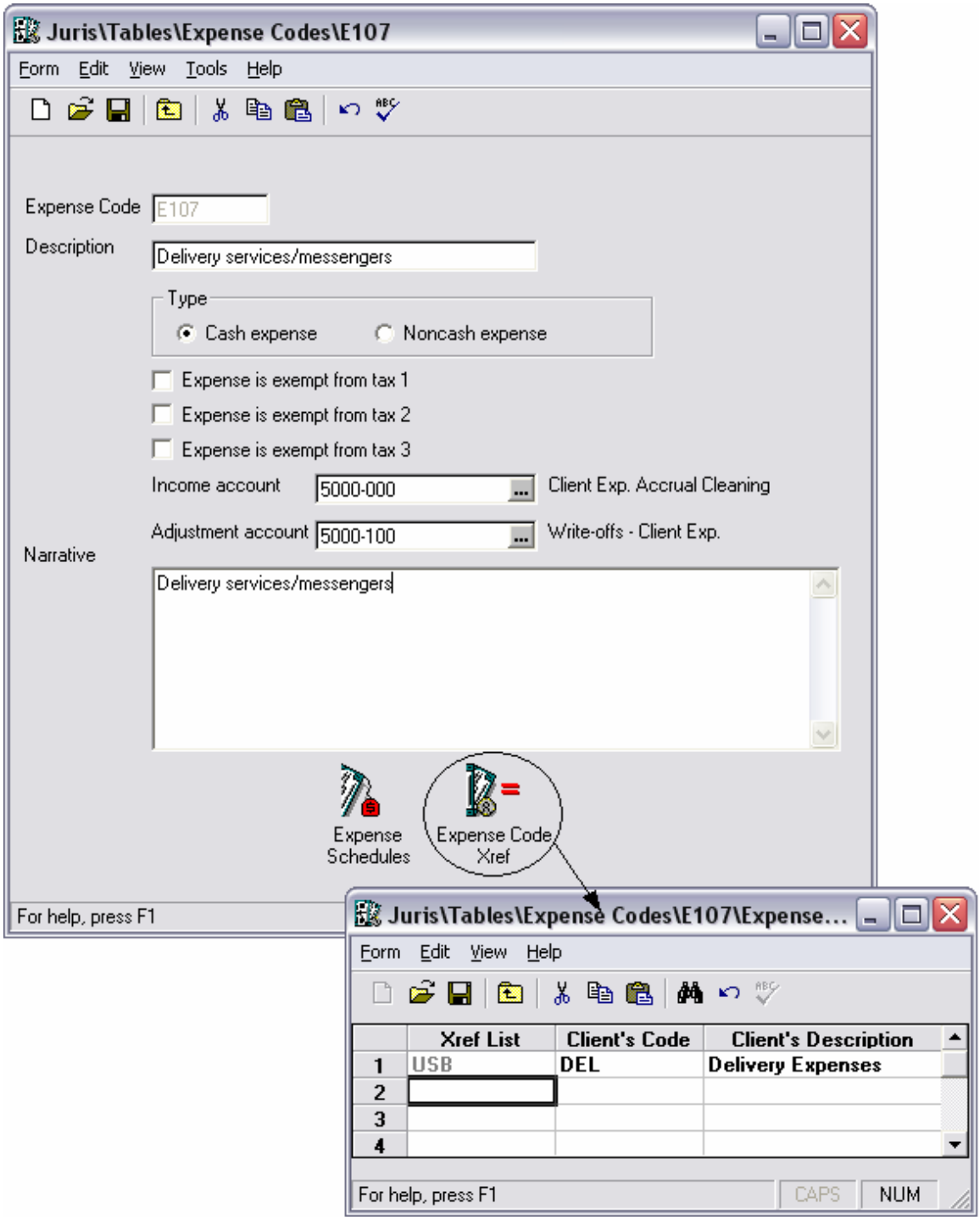


3. Review the *Expense Schedules* and *Expense Code Xref* forms as well.
4. Close the forms when finished reviewing.

Expense Codes – Expense Schedules



Expense Codes – Expense Code Xref

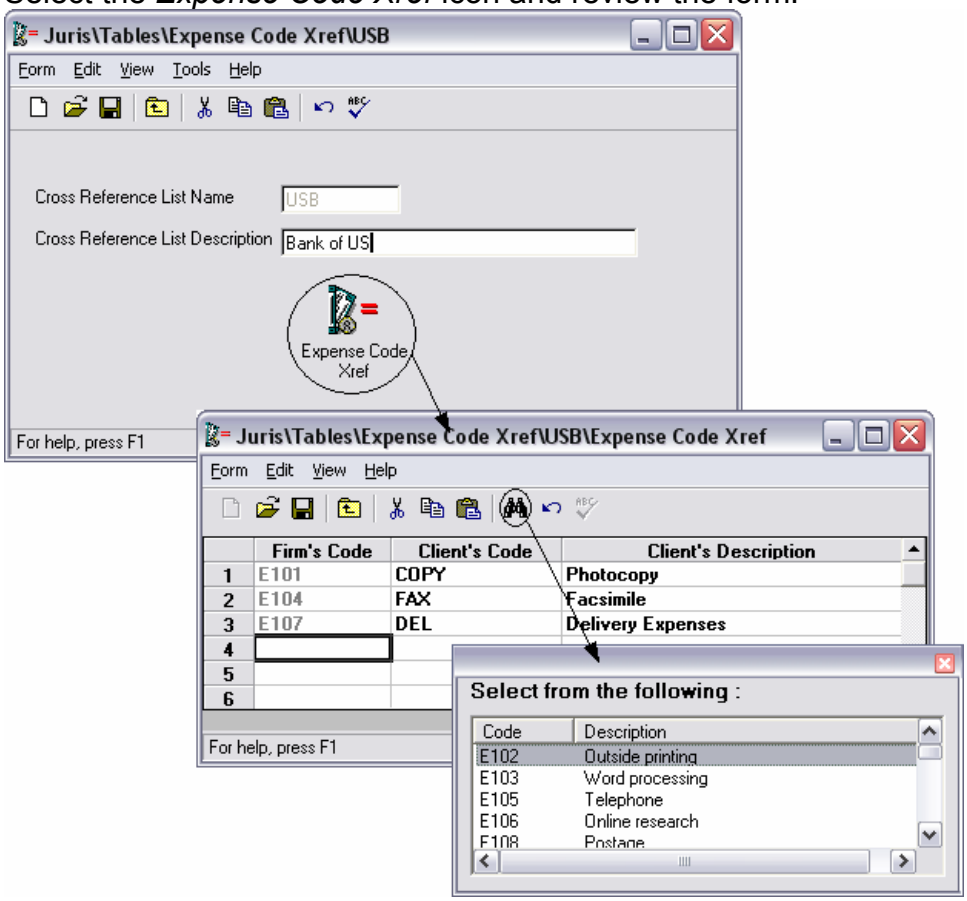


Expense Code Cross Reference

The *Expense Code Xref* (Cross Reference) may be used when a client prefers to see their own specific expense codes on their bills. If the client's codes are not the same as the firm's internal system for expense codes, the expense code xref will map the firm's code to the client's code and description. This allows expenses to be entered into Juris using the firm's normal expense codes, yet the cross-referenced code may be placed on the client's bill for their convenience.

Exercise:

1. Select Tables → Expense Code Xref
2. Double-Click on *Bank of US* cross reference.
3. Select the *Expense Code Xref* icon and review the form.



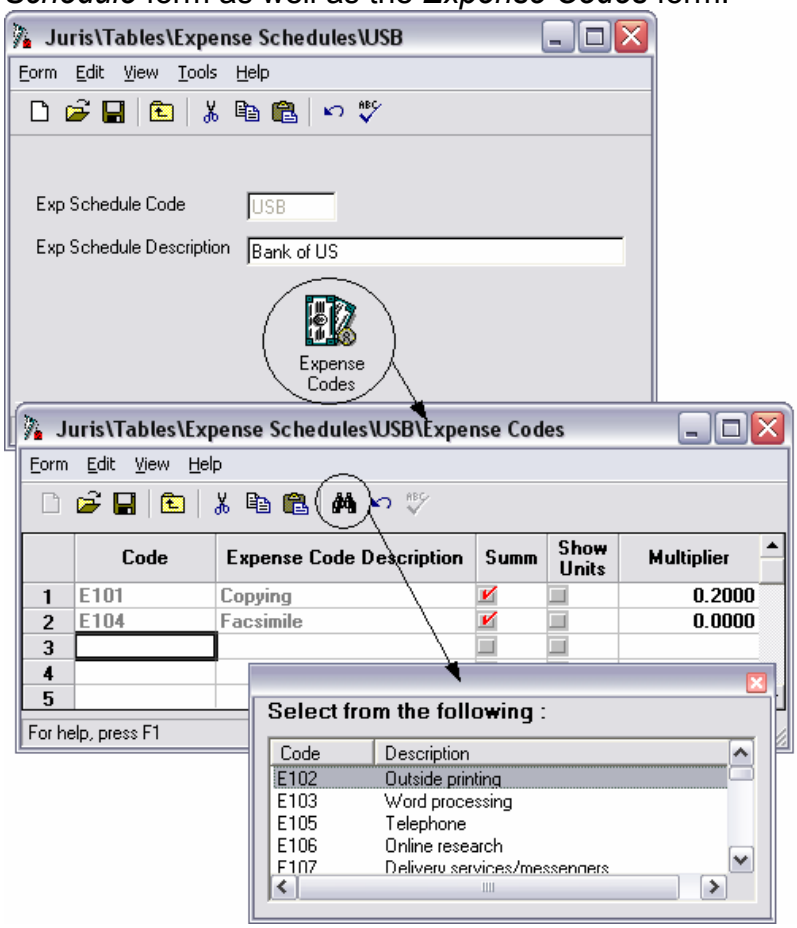
4. Close the forms when finished with review.

Expense Schedules

Expense Schedules may be used to establish specific expense amounts that differ from the standard expense amounts charged by the firm. For example, a client with whom the firm works with on a regular basis or through which a large volume of business is generated may be charged a lower amount than the standard expense amount. A particularly difficult or high-risk client may be charged a higher amount than the standard expense amount. In these instances, the firm may wish to establish specific expense schedules in order to easily charge the appropriate amounts.

Exercise:

1. Select Tables → Expense Schedules
4. Select the *Bank of US* schedule for review. Review *the Expense Schedule* form as well as the *Expense Codes* form.



5. Close the forms when done with review.

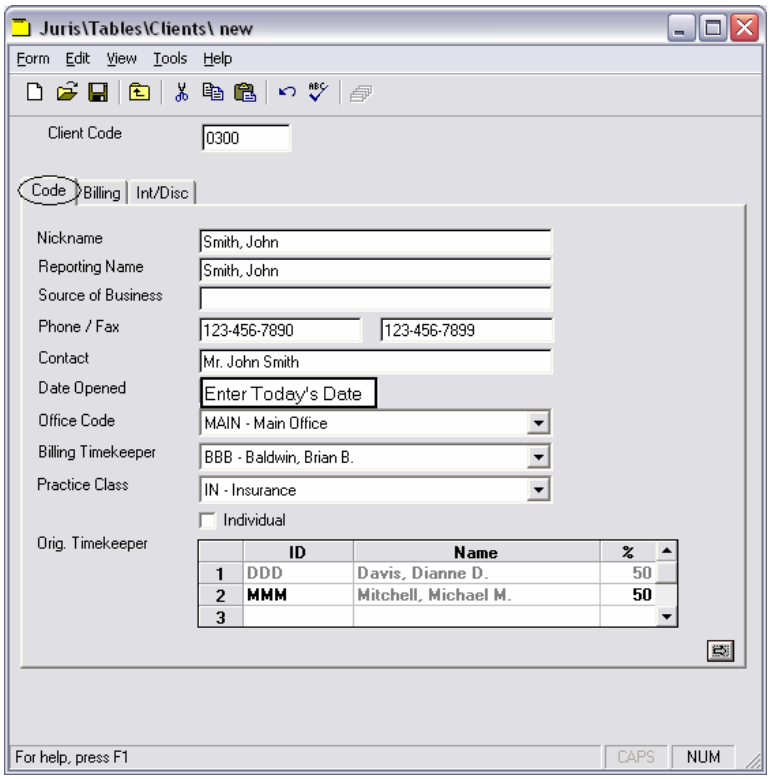
Client/Matters

The Client/Matters table provides a location to enter client and matter information and set up billing methods.

Exercise (Add Client):

1. Select Tables → Clients
2. Select the client "Gateway Insurance Company" for review. Review the three tabs for the client (*Code*, *Billing* and *Int/Disc*) as well as the *Billing Address*, *Consolidation* and *Matters* icons. Click *Form* → *Close* when finished reviewing the details.
3. Select *New* 🗋.
4. Enter the Client information as shown in the screens below:

Client – Code Tab



Client – Billing Tab

Juris\Tables\Clients\ new

Form Edit View Tools Help

Client Code 0300

Code | Billing | Int/Disc

Fee Schedule: STDR - Standard Rate Fee Schedule
Task Code Xref: - <<NONE>>
Expense Schedule: STDR - Standard Rate Expense Schedu
Exp Code Xref: - <<NONE>>
Bill Format: BF01 Basic Format
Prebill Format: BF01 Basic Format
Billing Agreement: H - Hourly
Flat Fee: Flat fee amount includes expenses
Retainer Type: - << N/A >>
Billing Frequency: Expenses: M - Monthly Fees: M - Monthly
Month and Cycle: Month: N/A Cycle: N/A
Thresholds: Expenses: 0 Include Fees if threshold met
Fees: 0 Include Expenses if threshold met

H - Hourly
T - Task Billing
F - Flat Fee
R - Retainer
C - Contingency
B - Pro Bono
N - Nonbillable

For help, press F1 CAPS NUM

Client – Int/Disc Tab

Juris\Tables\Clients\ new

Form Edit View Tools Help

Client Code 0300

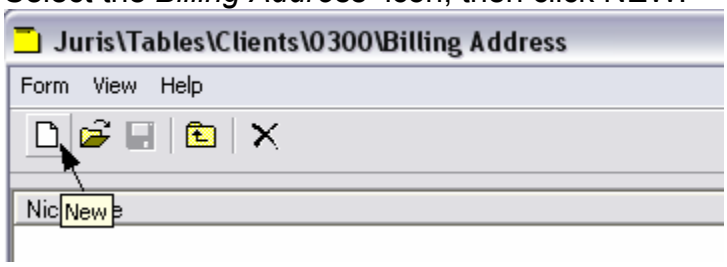
Code | Billing | Int/Disc

Interest Percent: 1.0000
Interest Days: 0
Discount Option: 0 - No discount Percent: N/A
Surcharge Option: 0 - No surcharge Percent: N/A
Tax Exemptions: Exempt from Tax #1
Exempt from Tax #2
Exempt from Tax #3
Budget Options: Enable budgeting
Require phase numbers on all transactions
Require task codes on all time entries
Require activity codes on all time entries
Require task codes on all expense entries

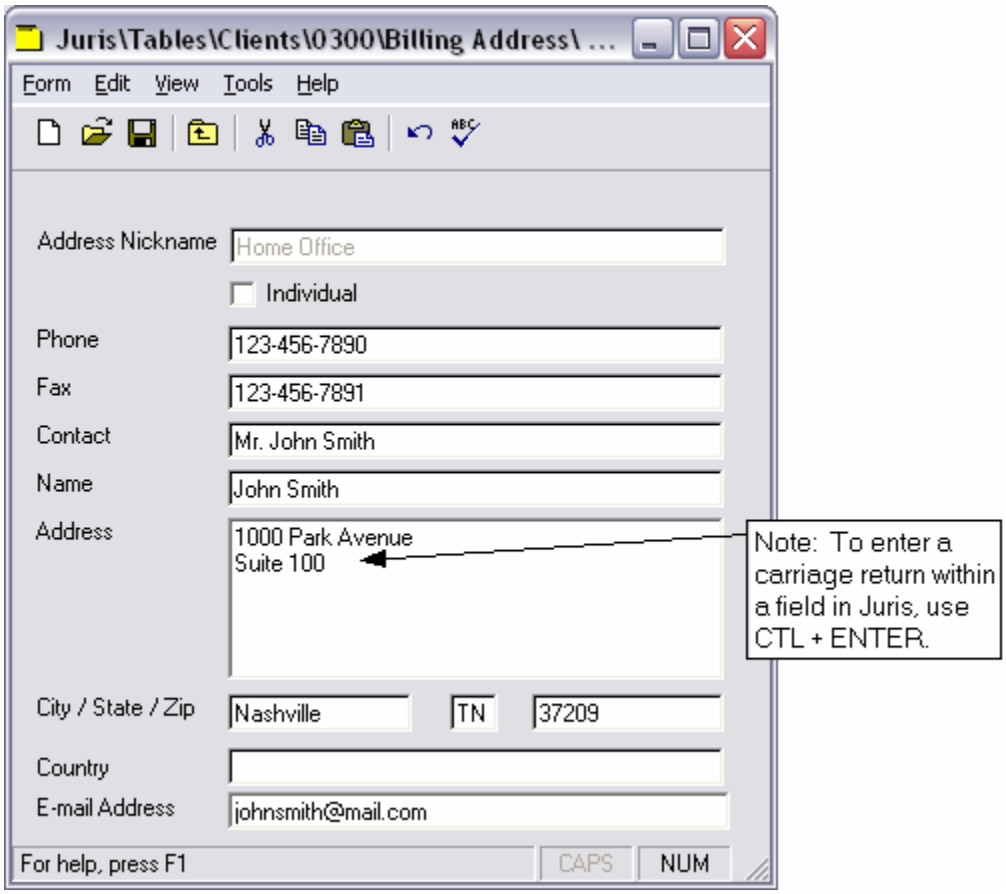
For help, press F1 CAPS NUM

5. Select *Save* , then the *Billing Address*, *Consolidation* and *Matters* icons will appear.

6. Select the *Billing Address* icon, then click NEW.



7. Enter the address as shown below:

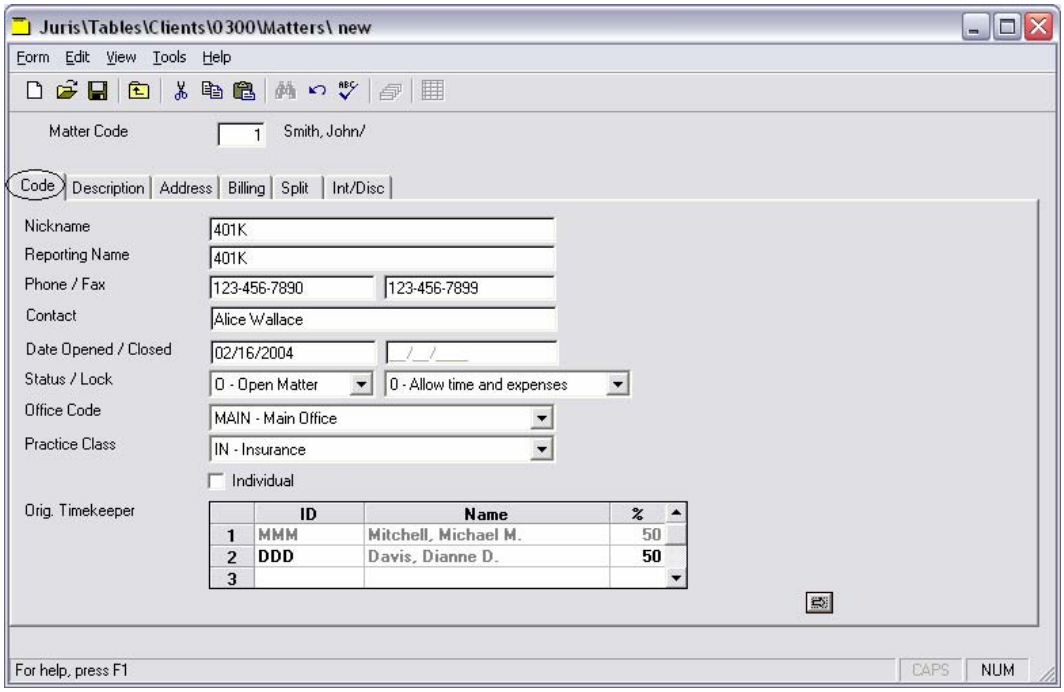


8. Save and close the forms when finished entering values.

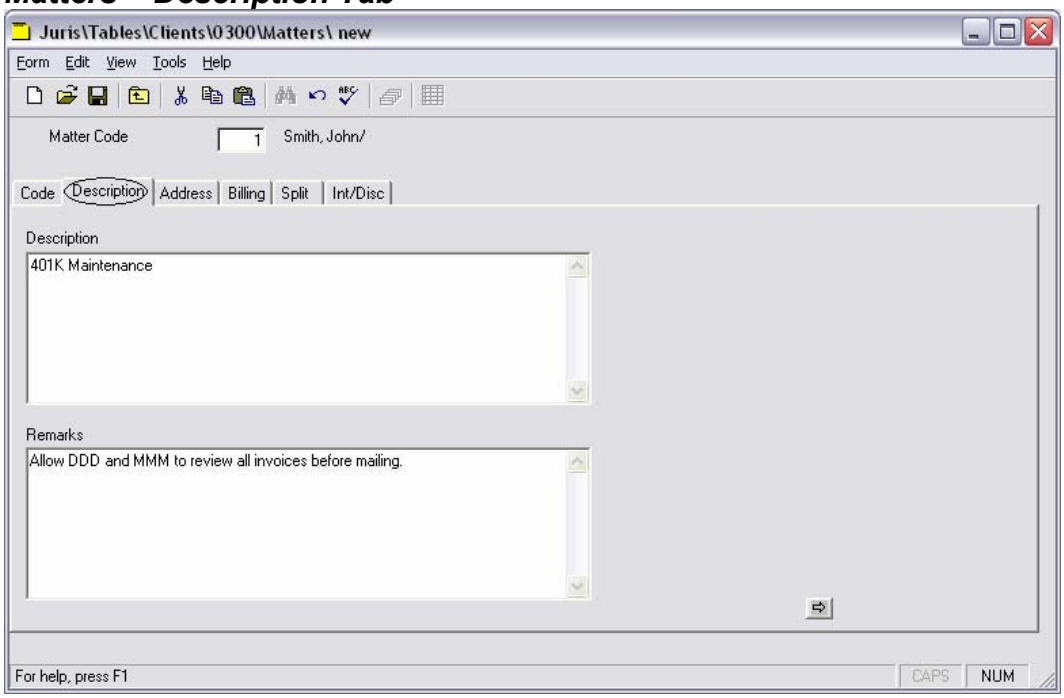
Exercise (Add Matters):

1. Select Tables → Clients
2. Select the client "John Smith" that was just added.
3. Select the *Matters* icon Matters.
4. Enter the Matter information as shown in the following forms:

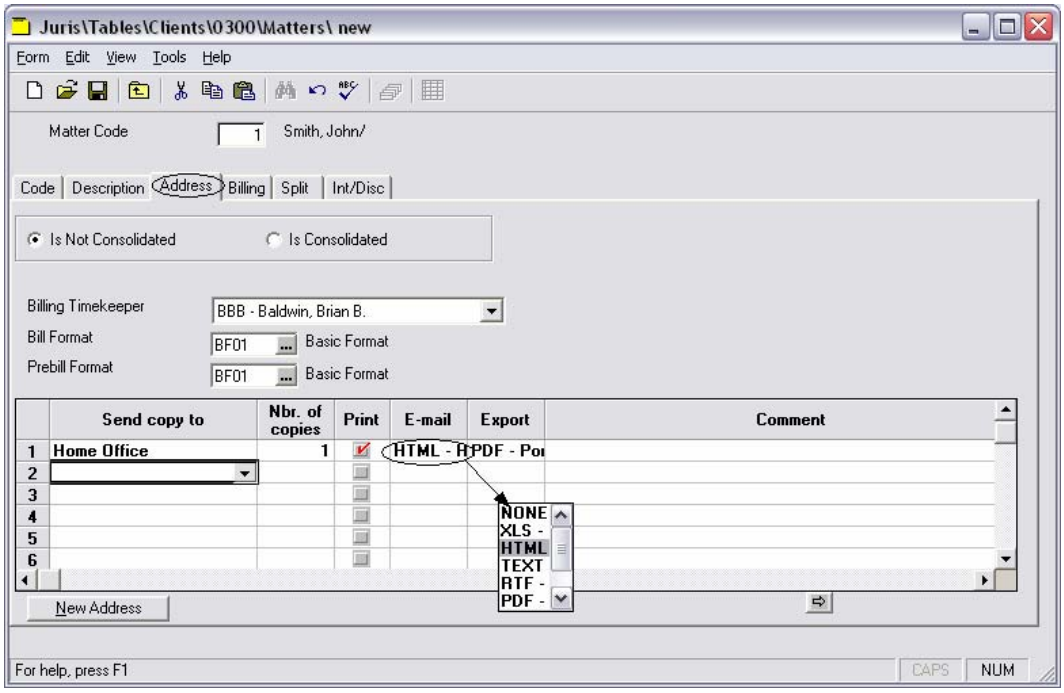
Matters – Code Tab



5. ***Matters – Description Tab***



Matters – Address Tab



Matters – Billing Tab

Juris\Tables\Clients\0300\Matters\ new

Form Edit View Tools Help

Matter Code 1 Smith, John/

Code | Description | Address | Billing | Split | Int/Disc

Fee Schedule: STDR - Standard Rate Fee Schedule
Task Code Xref: - <<NONE>>
Expense Schedule: STDR - Standard Rate Expense Schedu
Exp Code Xref: - <<NONE>>
Quick Action: 0 - << NONE >>
Billing Agreement: H - Hourly
Amount: N/A
Flat Fee: Flat fee amount includes expenses
Retainer Type: - << N/A >>
Billing Frequency: Expenses: M - Monthly Fees: M - Monthly
Month and Cycle: Month: N/A Cycle: N/A
Thresholds: Expenses: 0 Include Fees if threshold met
Fees: 0 Include Expenses if threshold met

H - Hourly
T - Task Billing
F - Flat Fee
R - Retainer
C - Contingency
B - Pro Bono
N - Nonbillable

M - Monthly
Q - Quarterly
S - Semiannually
A - Annually
C - on Cycle

For help, press F1 CAPS NUM

Matters – Split Tab

Juris\Tables\Clients\0300\Matters\ new

Form Edit View Tools Help

Matter Code 1 Smith, John/

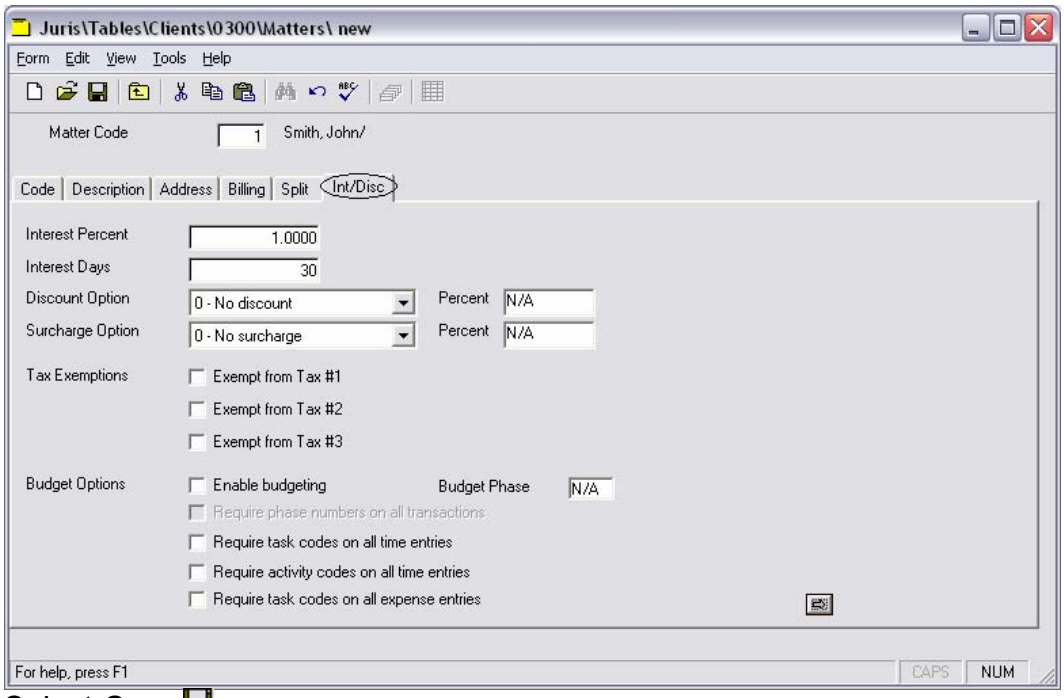
Code | Description | Address | Billing | Split | Int/Disc

Split Billing Method: 0 - Matter does NOT split
Threshold: N/A

	Client Code	Matter Code	Matter Reporting Name	Split %
1				
2				
3				
4				
5				
6				
7				
8				

For help, press F1 CAPS NUM

Matters – Int/Disc Tab



6. Select *Save* .
4. Select *Form* → *Close* to exit the Matter form.
5. Select *Form* → *Close* to exit the Client form.

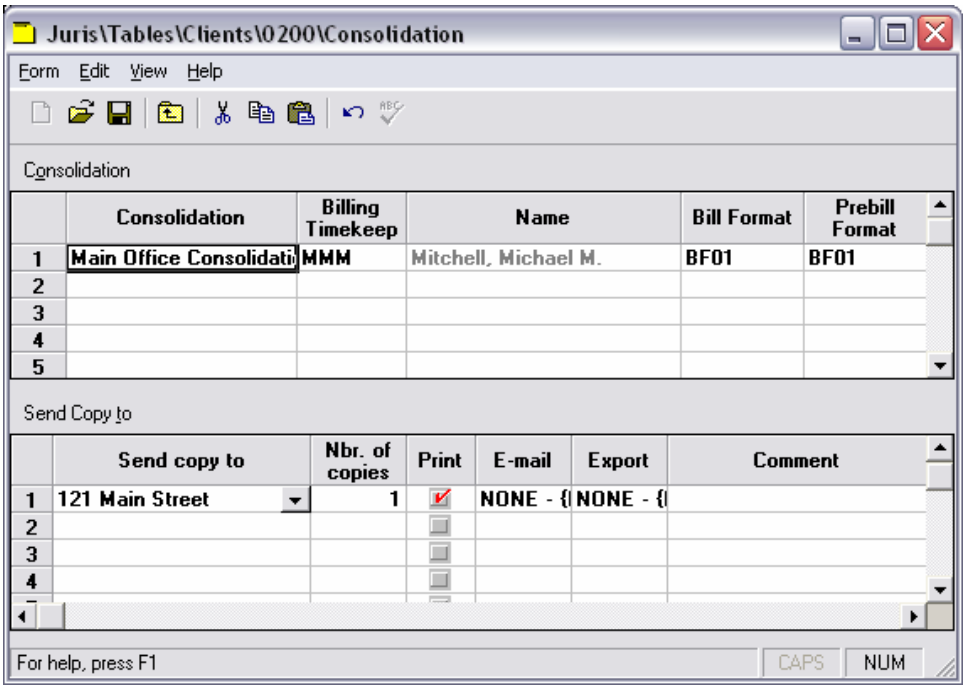
Consolidation

The consolidation form allows the user to select certain billing options that will apply to matters that belong to a consolidation.

Exercise:

1. Open the Client *0200 - Main Street Bank*.
2. Click the consolidation button.

3. Review the consolidation form.



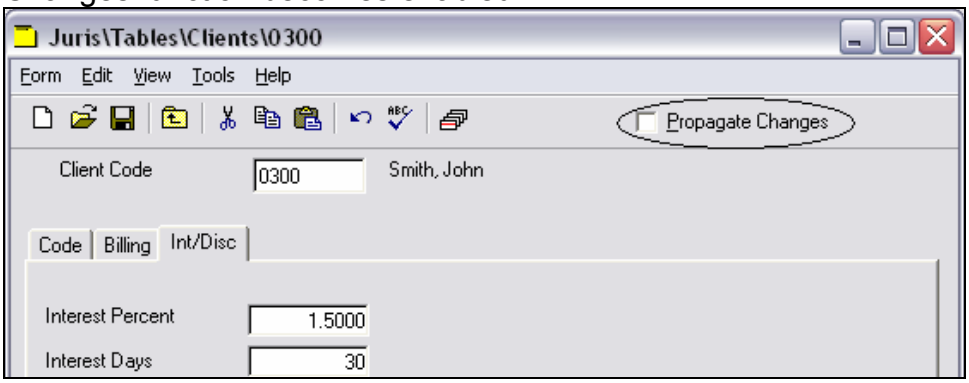
4. Close the form when finished with review.

Propagate Changes

When Matters are created, several fields that are shared by both Client and Matter will automatically populate the Matter with the same value as assigned for the corresponding Client. These shared values may be changed at the Client level and that change may then be propagated to the Matters, if desired.

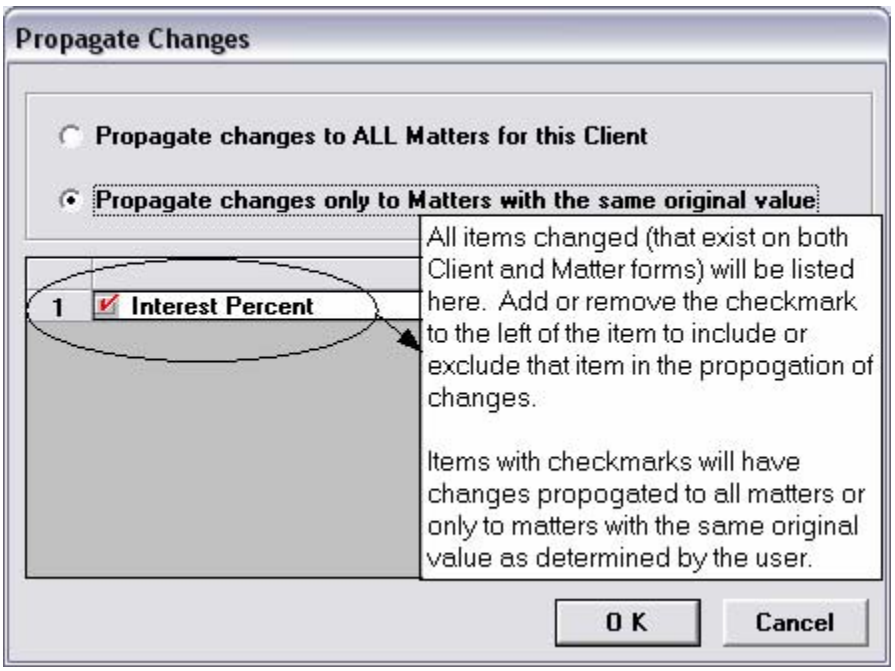
Exercise:

1. Open the Client "John Smith" and go to the *Int/Disc* tab.
2. Change the Interest Percent from 1.000 to 1.500. Notice that the Propagate Changes function becomes enabled.



3. Place a checkmark in the Propagate Changes box and save. Notice that Juris will list the items that have changed and will give the option to propagate

the changes for all matters, or just matters that had the same original value for that item.



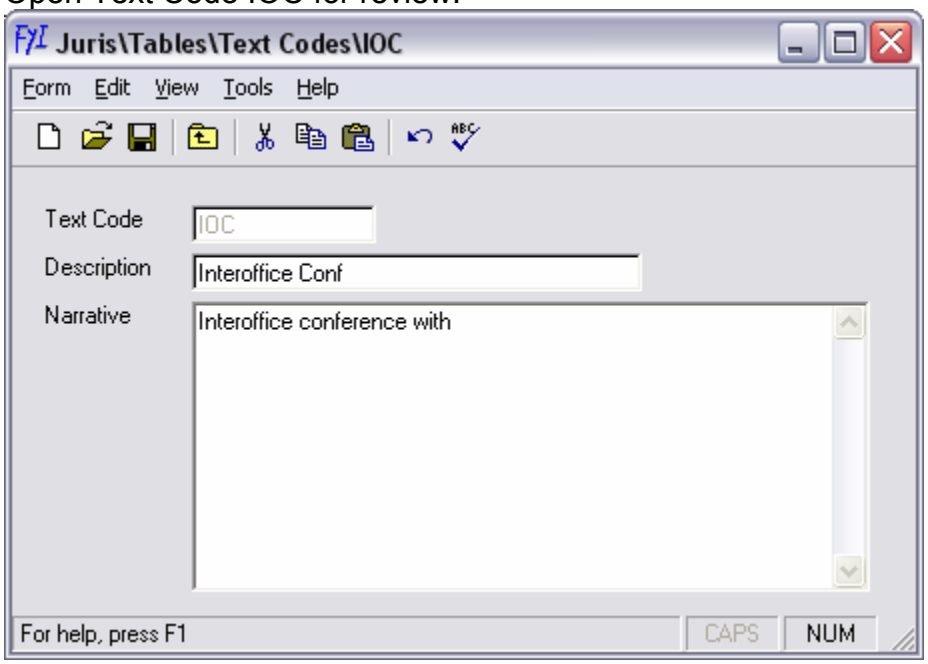
4. Click the OK button to propagate the change. Now open Matter 1 and verify that the interest percent has changed from 1.000 to 1.500. Close the forms when done reviewing.

Text Codes

Text codes may be used as shorthand for frequently keyed phrases.

Exercise:

1. Select Tables → Text Codes
2. Open Text Code IOC for review.

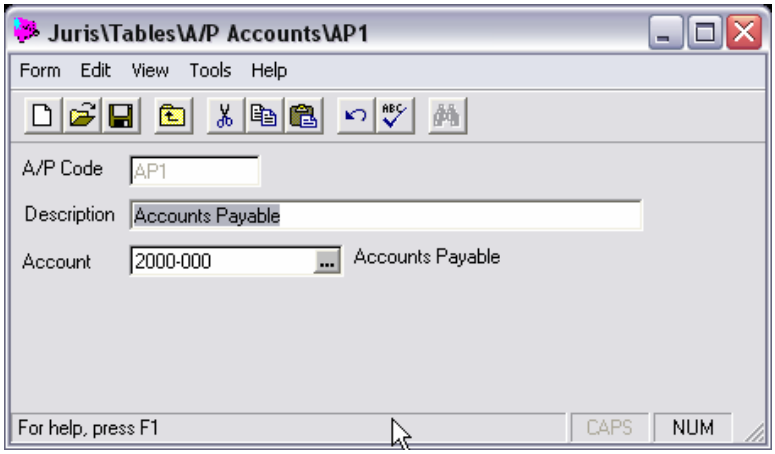


3. Close the form when finished reviewing the details.

A/P Accounts

Exercise:

1. Select Tables → A/P Accounts
2. Select AP1 account for review.
3. Click *Form* → *Close* when finished reviewing the details of the form.



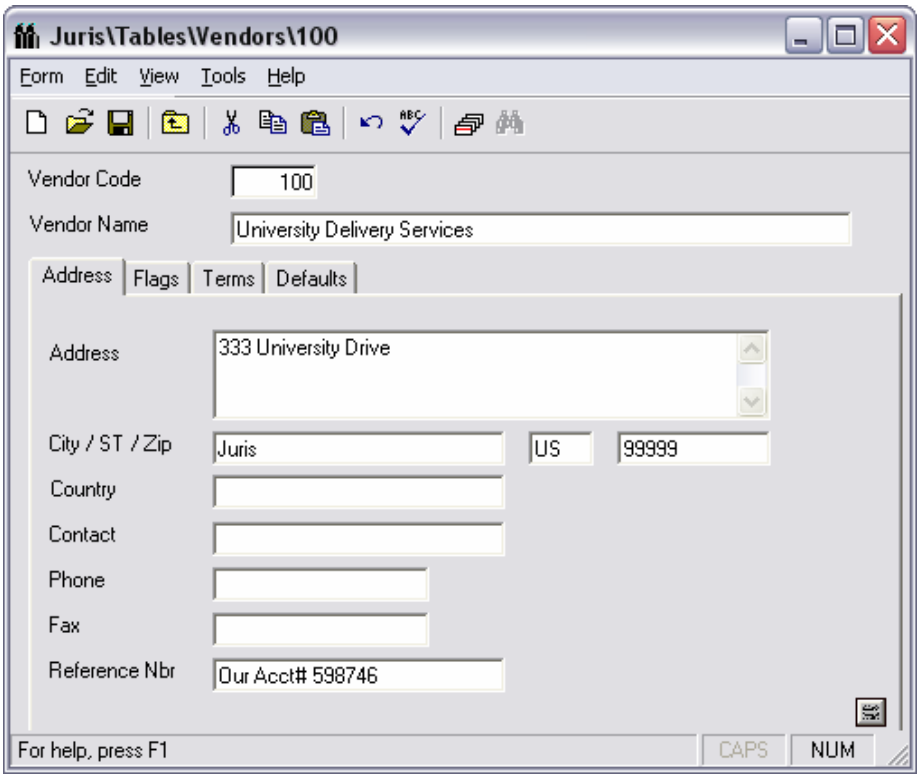
Vendors

Vendors may be added to the Juris system to allow for easy payment of invoices that are received by the firm.

Exercise:

1. Select Tables → Vendors
2. Select the vendor "University Delivery Services" for review. Make sure to view the *Address*, *Flags*, *Terms* and *Default* tabs.
3. Close the forms when finished with review.

Vendors – Address Tab



Vendors – Flags Tab

Juris\Tables\Vendors\100

Form Edit View Tools Help

Vendor Code 100

Vendor Name University Delivery Services

Address | Flags | Terms | Defaults

Payments

- [ ] Hold all payments
- [ ] No purchases
- [ ] Separate check
- [ ] Always take discount

Payment group

Taxes

- [x] Gets 1099

Report As: Nonemployee compensation

Supplemental Amount(s):

2003 $0.00

2002 $0.00

Tax ID type: (•) Fed Employer ID ( ) Soc Sec Nbr

Tax ID number 579999999

For help, press F1 CAPS NUM

Vendors Terms Tab

Juris\Tables\Vendors\100

Form Edit View Tools Help

Vendor Code 100

Vendor Name University Delivery Services

Address | Flags | Terms | Defaults

Terms type: (•) Due days ( ) Proximo

Terms description

Due days 0

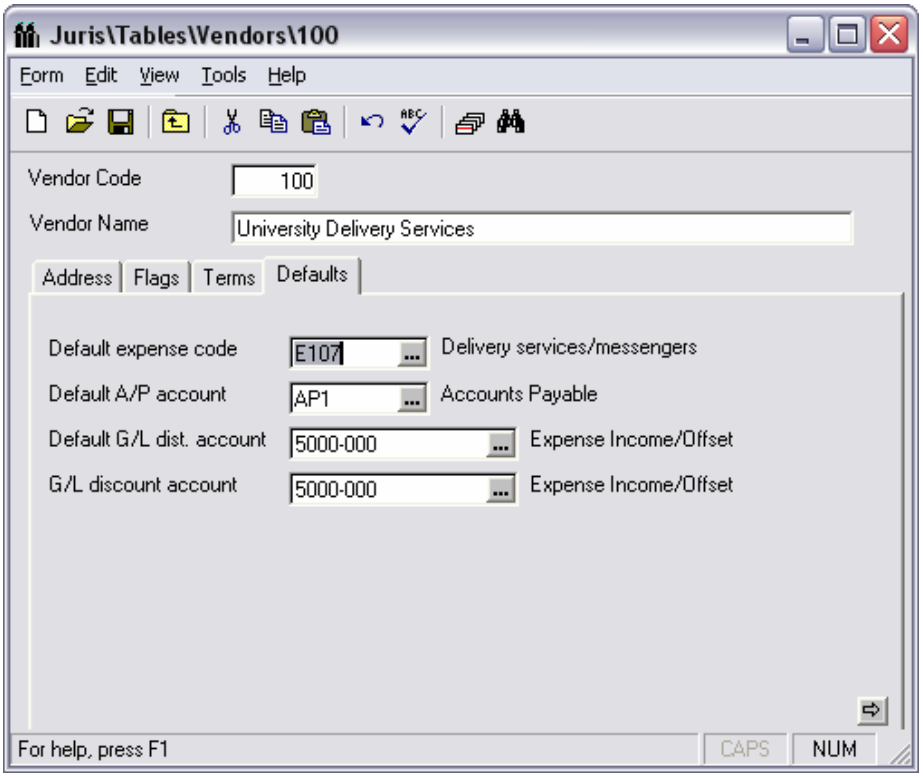
Discount days 0

Discount percent 0.0000

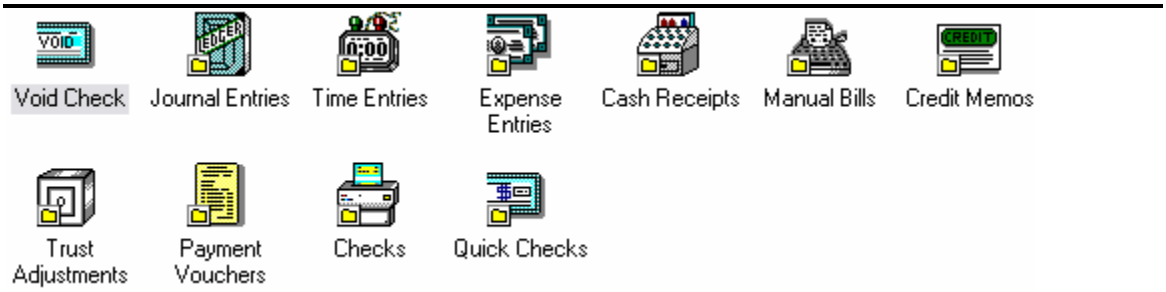
Discount cutoff 0

For help, press F1 CAPS NUM

Vendors Defaults Tab



TRANSACTIONS



Introduction

The transaction area is where all of the details of the firms operations are entered. Transactions are kept in batches. The batch system compartmentalizes transactions in groups based on date, user, etc.

Creating transactions in Juris requires a three-step approach:

1. Select New to create a new Batch.
2. Select New to add a transaction to the Batch.
3. Complete and Save the new entry.

Batch Status:

- Unposted – Items in batch are in an adaptable state. Entries may be edited with no impact on the general ledger
- Ready to Post – Batch is still 'Unposted' but the user has designated that the batch may be posted when posting is performed by an administrative user. If changes are made to any item in a 'Ready to Post' batch, the status will revert to 'Unposted.'
- Posted – Items in the batch have been transferred to the general ledger.
- Locked – Batch is currently opened by a user.
- Deleted – Batch is listed, but may not be opened. Deleted batches may be purged.

Batch Types:

Time and Expense Entries allow for 3 different types of batches to be created:

- Normal Batch – Batch is assigned a status 'Unposted' when saved.
- Direct Batch – Batch is automatically posted when saved.
- Adjustment Batch – Used to make alterations to items within a posted batch. Journal entries are created to perform the adjustments.

Time Entries

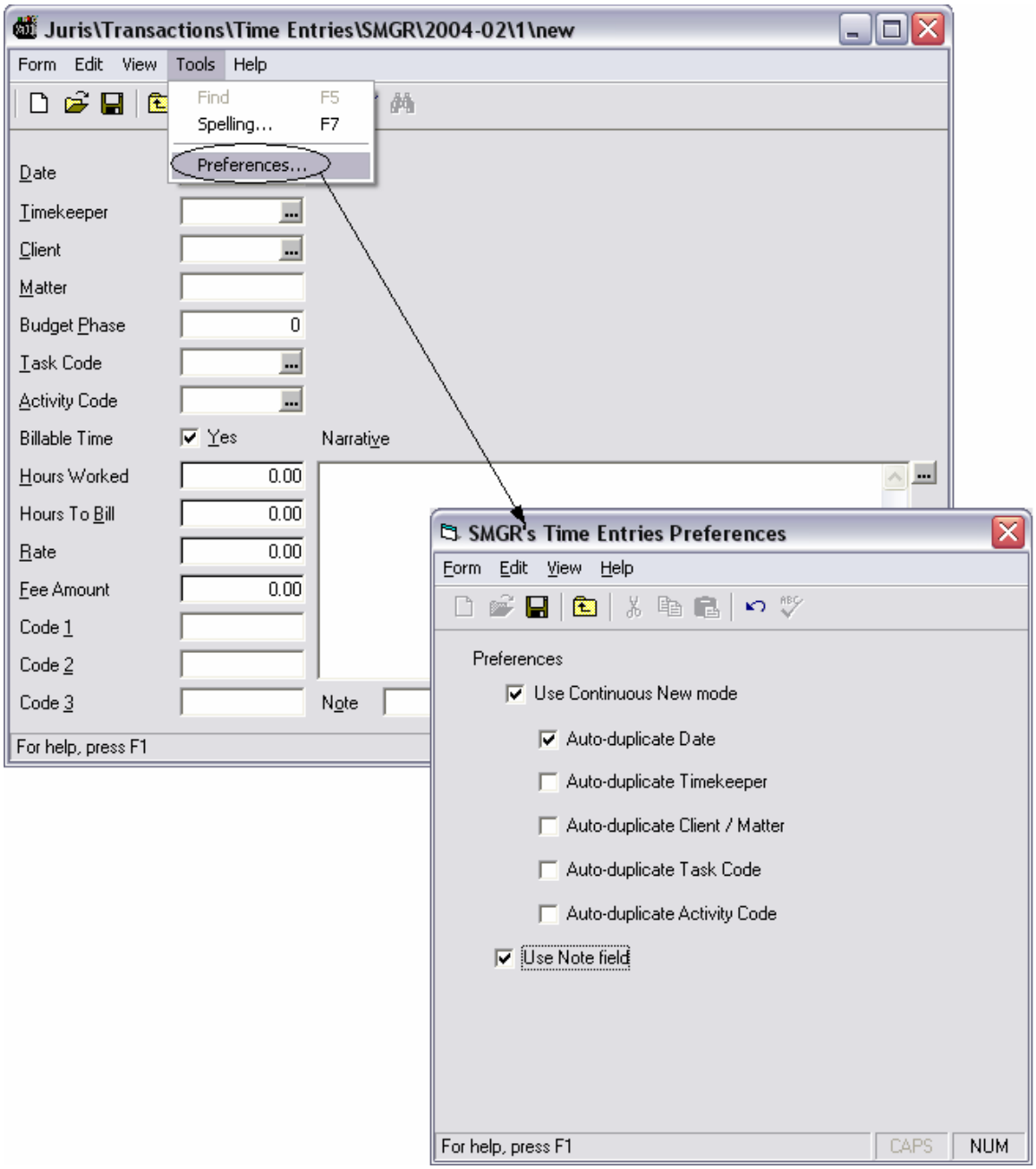
Time Entries may be entered through Juris or may be imported into batches from external sources.

The time entry form has 2 options: Professional View and Administrative View. Rights to use Professional View of time entries must be granted in User IDs/Menu Rights. If Professional View is not selected, 'Administrative View' is used.

Professional View contains a stopwatch that may be used by the professional to track time as worked, and the time entries created in Professional View are placed in normal time batches. Professional View allows the user to import time as well as manually enter and edit time entries in unposted batches. Those using Professional View may print time entry edit reports as well as change the status of their batches to "Ready to Post."

Administrative View allows all of the functions of Professional View except for the stopwatch. Administrative view also allows the additional functions of entering Direct or Adjustment Batches in addition to Normal Batches.

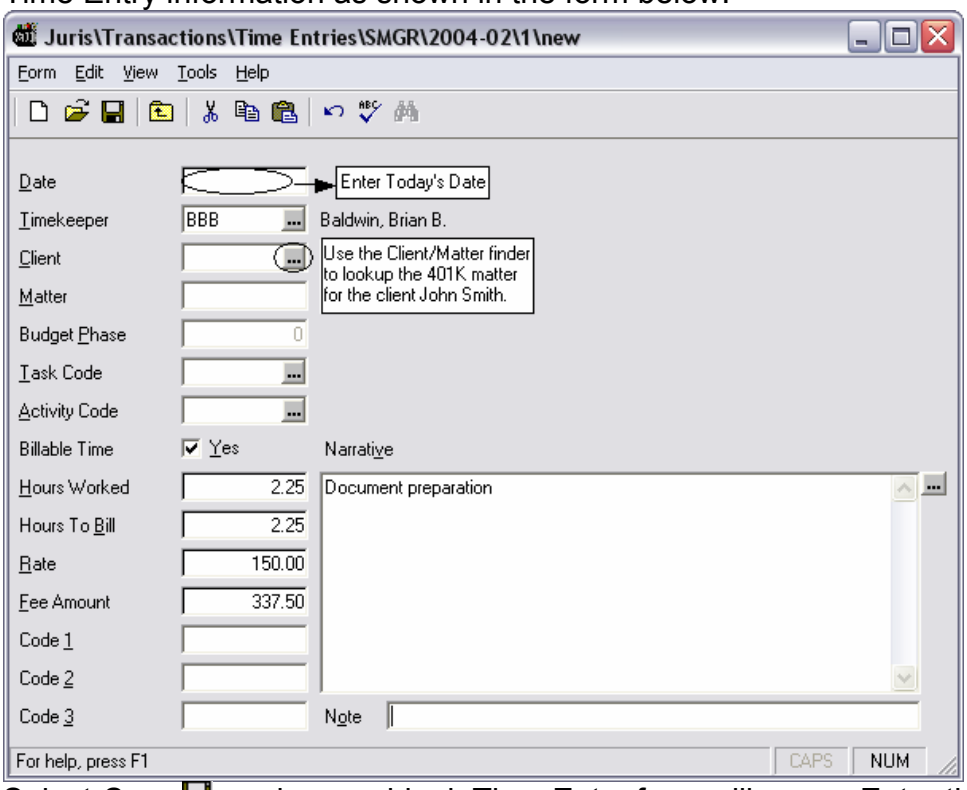
Time Entry Preferences



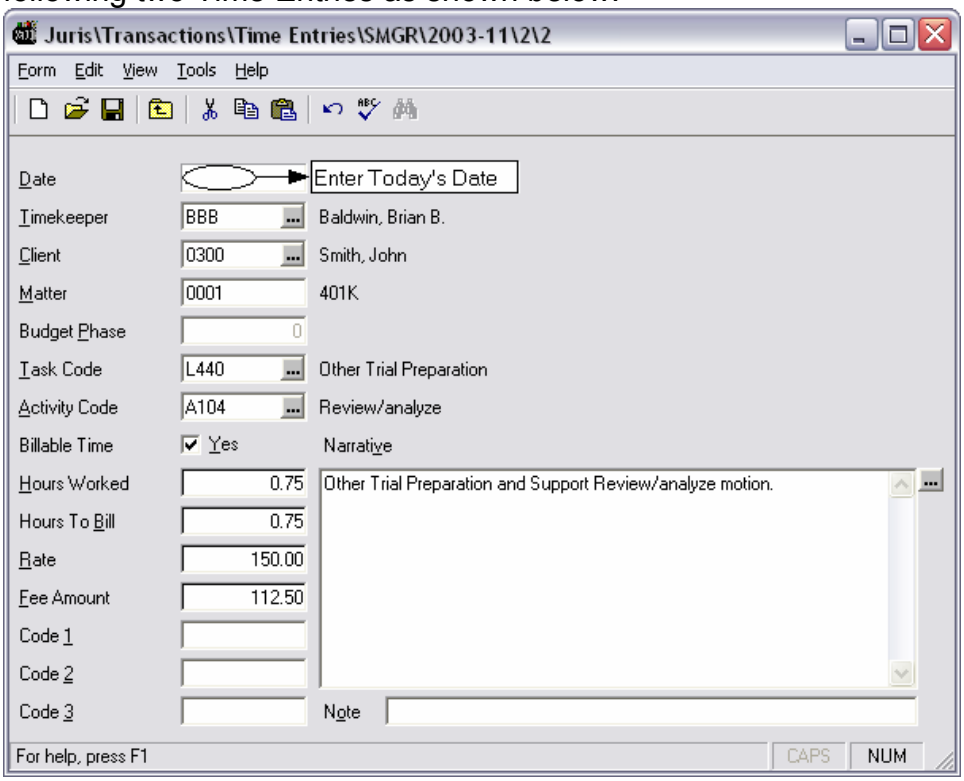
Exercise:

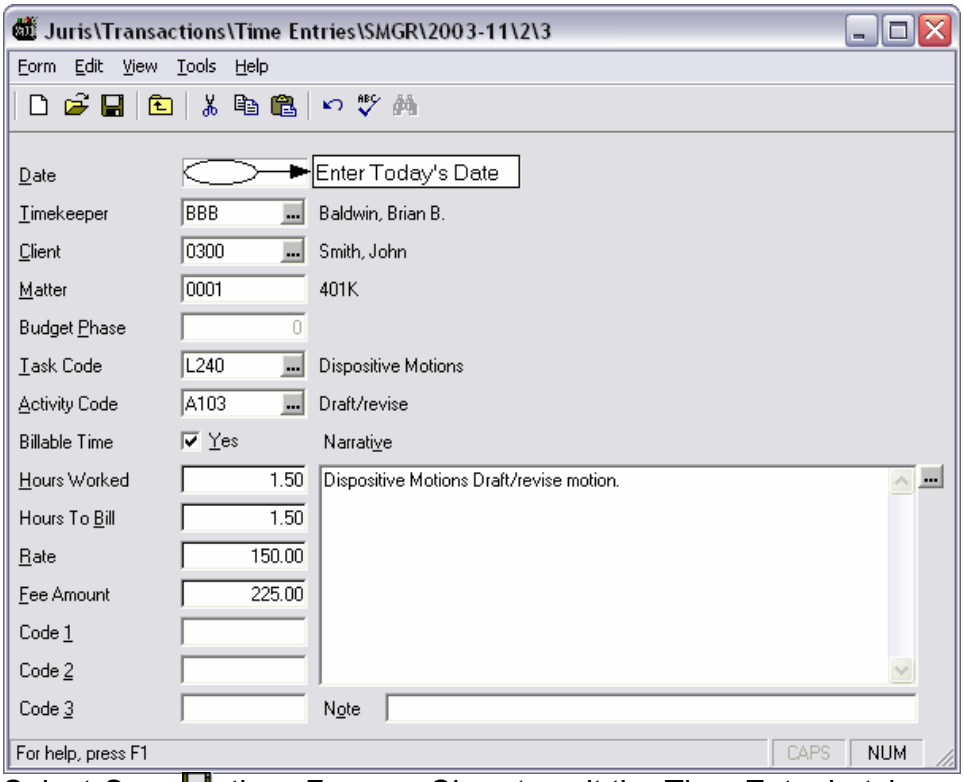
1. Select Transactions → Time Entries
2. Select *New* to open a new batch.
3. Select *Normal Batch*, accept the default comment and click OK.

4. Select *New* 🗋 to create a new time entry in the batch. Enter the following Time Entry information as shown in the form below:



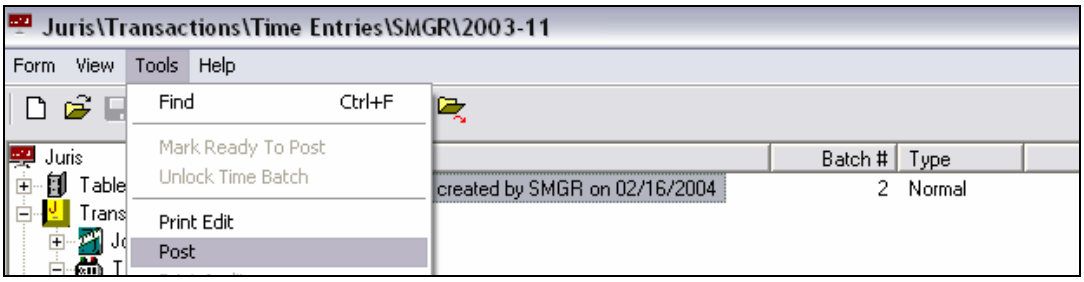
5. Select *Save* 💾, and a new blank Time Entry form will open. Enter the following two Time Entries as shown below:





6. Select *Save* , then *Form* → *Close* to exit the Time Entry batch.
7. From the Tools menu on the batch, select the "Ready to Post" option.

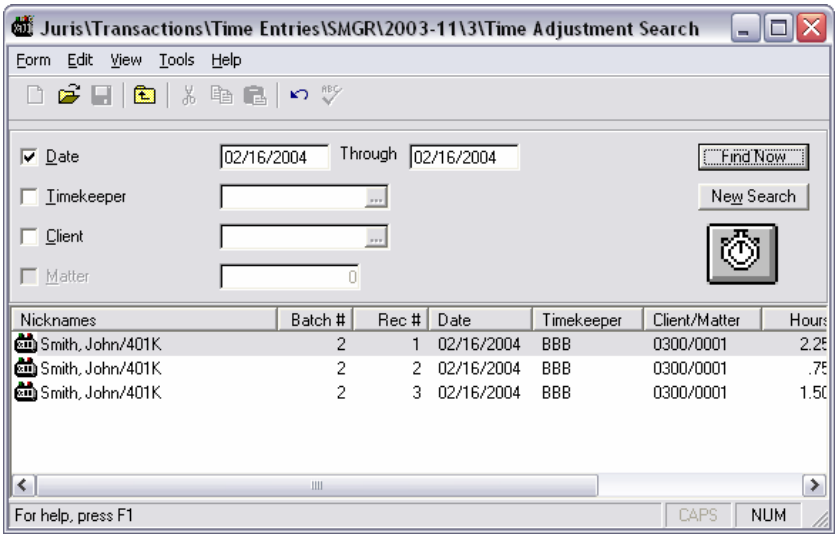
8. Select *Form* → *Close* to close the batch.
9. Click the batch to highlight it and from the Tools menu on the batch list, select the "Post" option to post the batch.



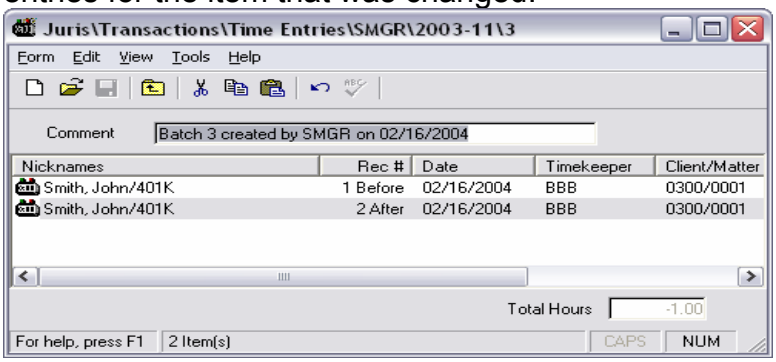
Adjustments to Posted Time

Exercise:

1. Select Transactions → Time Entries
2. Select *New* to open a new Time Batch.
3. Select *Adjustment Batch*, accept the default comment and click OK.
4. Select *New* to open a new Adjustment entry.
5. Select Date and do a date range of Today's date – today's date and select *Find Now*.



6. Open one of the entries found by double-clicking the item in the list and change the hours worked and hours billed down to .5 hours. [Note the option to Post in Period of "Today's Date" or "Original Date"] Select *Save* , then *Form* → *Close* to exit the Time Entry. This will show the Before and After entries for the item that was changed.



7. Select *Form* → *Close* to exit the batch. Posting is automatic.

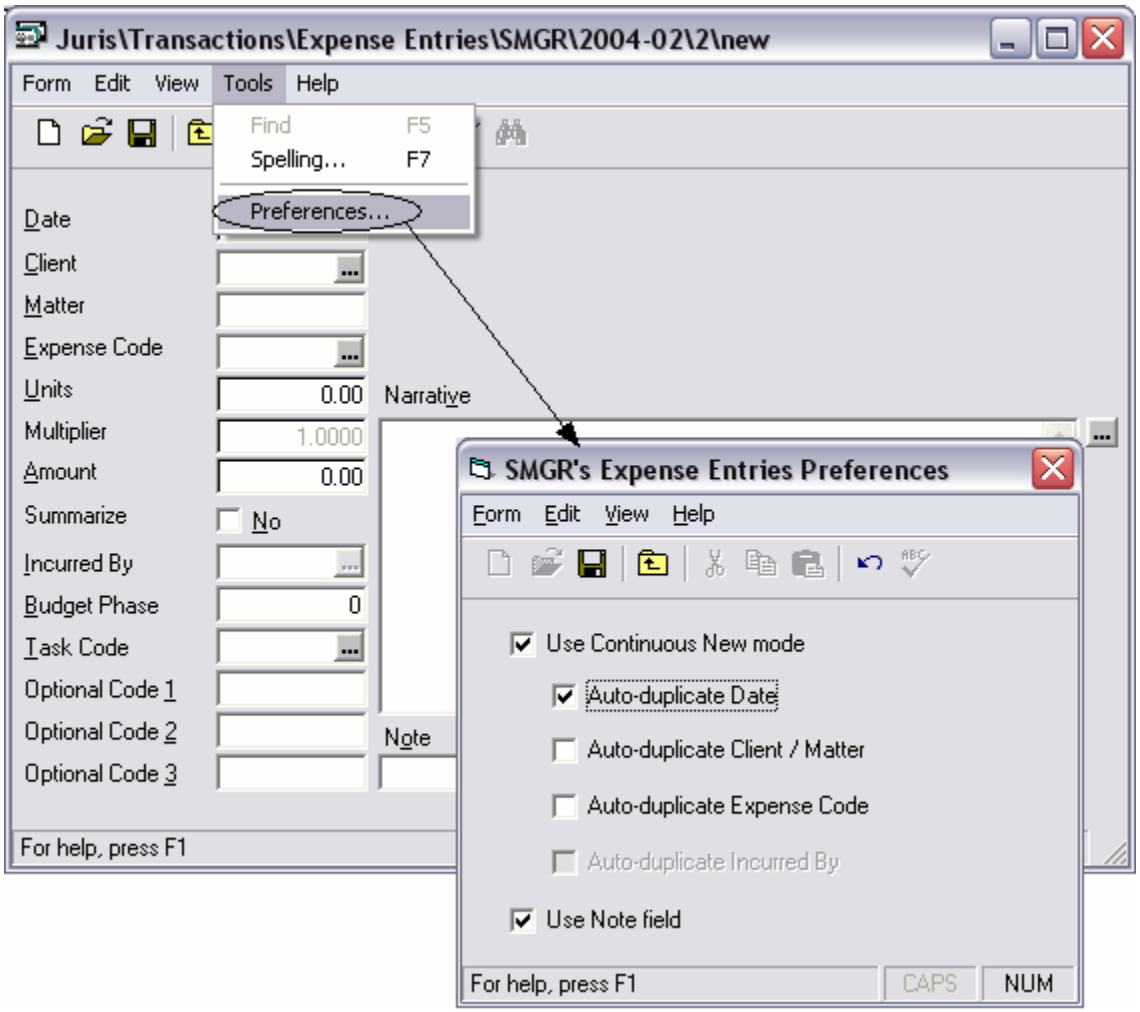
Expense Entries

Time, Expense and Journal Entries all provide functions for importing entries into batches from external sources.

Expense Entries additionally request the Type of Batch to be created when performing step 1 above. Those choices include:

- Normal Batch
- Direct Batch
- Adjustment Batch

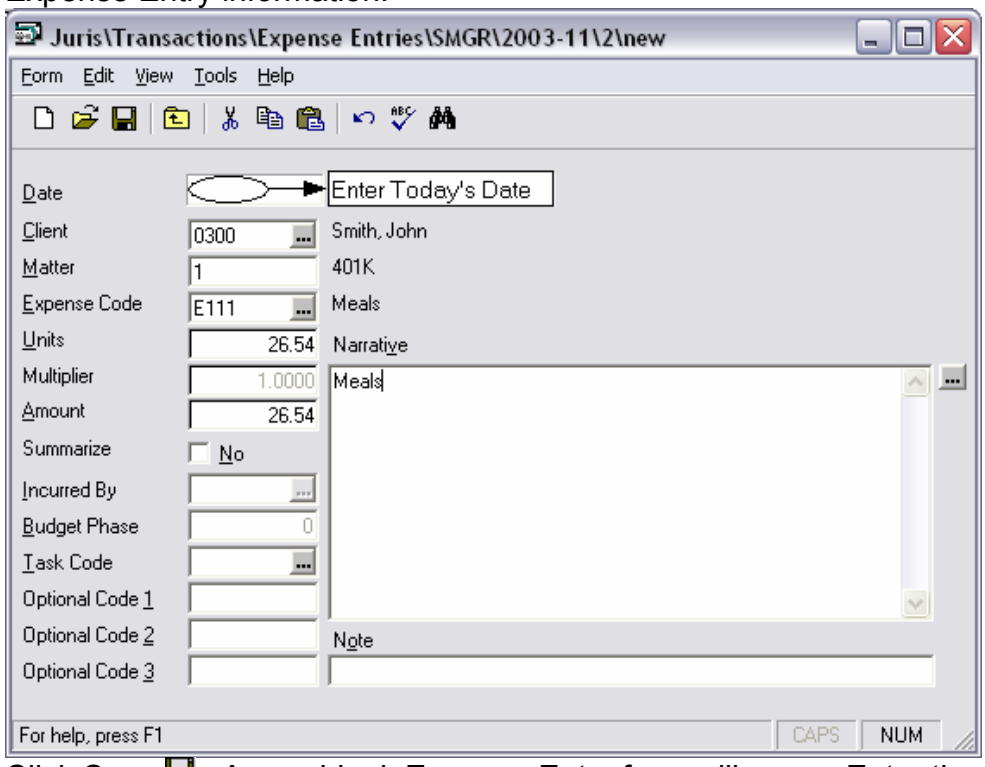
Expense Entry Preferences



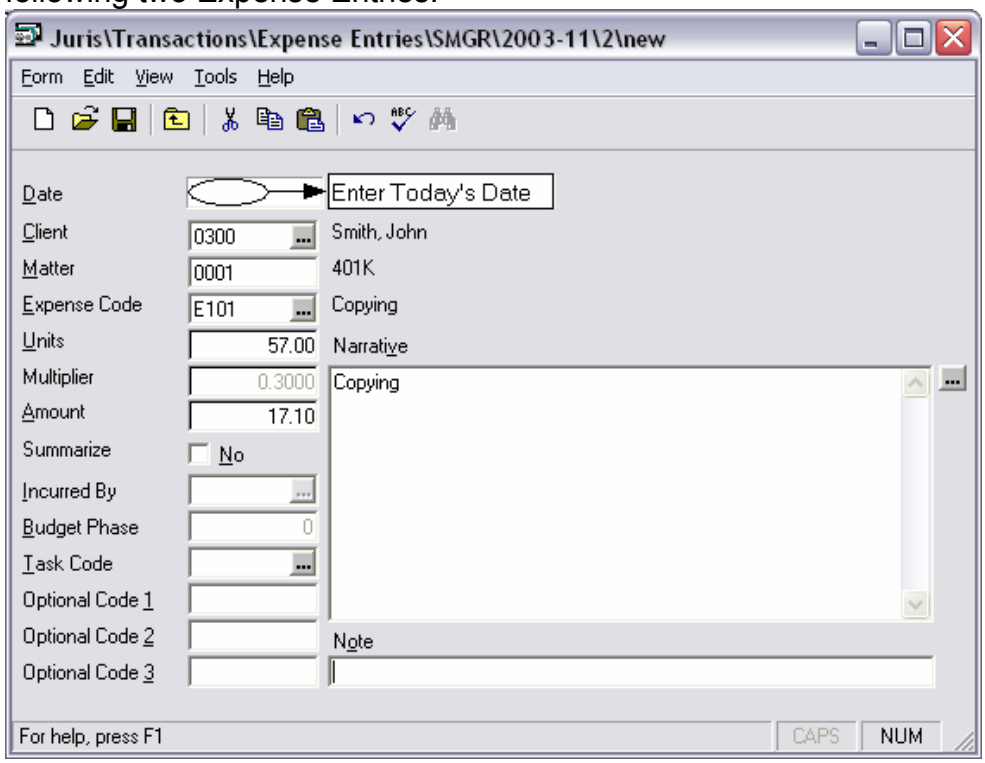
Exercise:

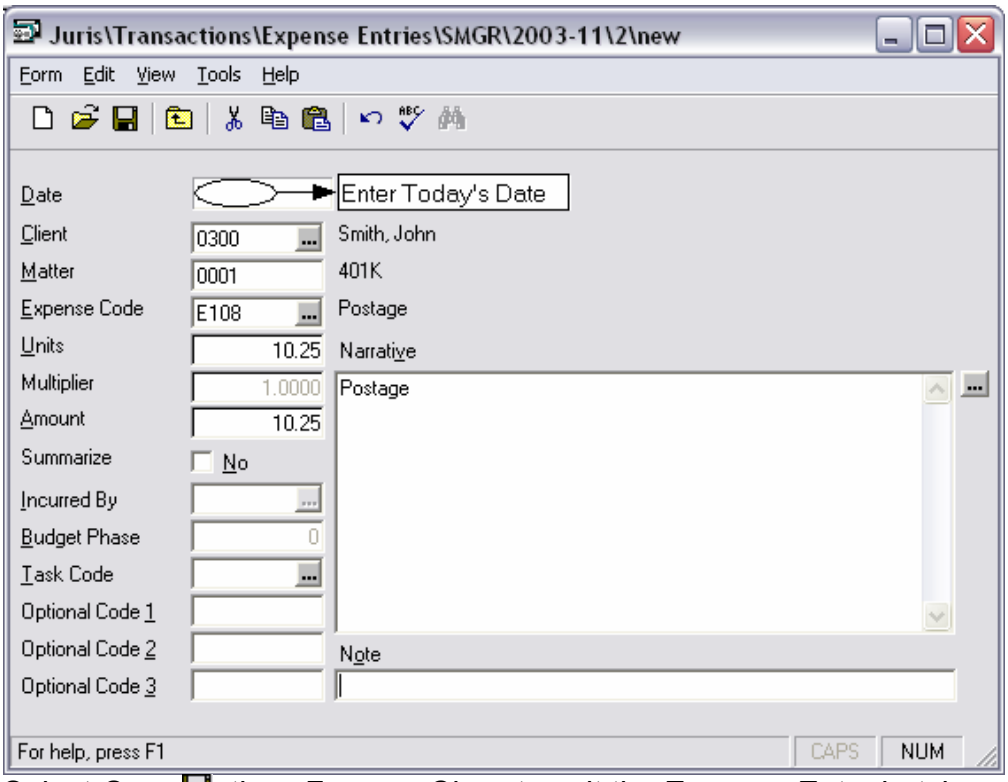
1. Select Transactions → Expense Entries

2. Select *New* 🗋 to open a new Expense Batch.
3. Select *Normal Batch*, accept the default comment and click OK.
4. Select *New* 🗋 to create a new expense entry in the batch. Enter the following Expense Entry information:

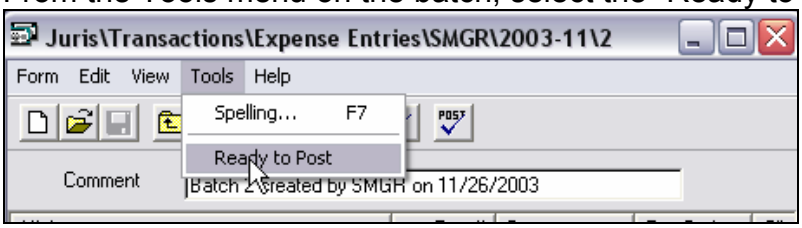


5. Click Save 💾. A new blank Expense Entry form will open. Enter the following two Expense Entries:

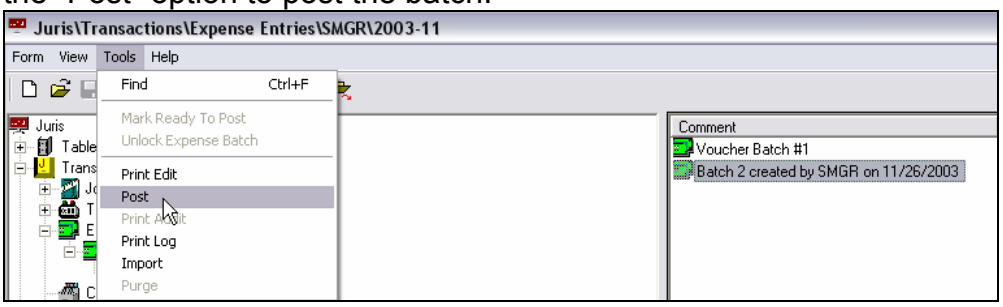




6. Select *Save* 💾, then *Form* → *Close* to exit the Expense Entry batch.
7. From the Tools menu on the batch, select the "Ready to Post" option.



8. Select *Form* → *Close* to close the batch.
9. Click the batch to highlight it and from the Tools menu on the batch list, select the "Post" option to post the batch.

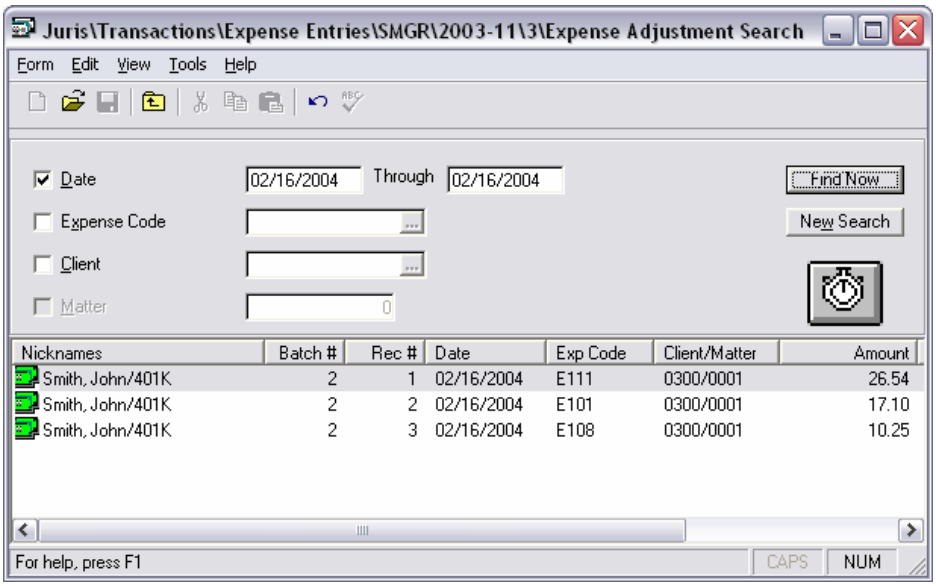


Adjustments to Posted Expenses

Exercise:

1. Select Transactions → Expense Entries
2. Select *New* 🗋 to open a new Expense Batch.
3. Select *Adjustment Batch*, accept the default comment and click OK.

4. Select *New* 🗋 to open a new Adjustment entry.
5. Select Date and do a date range of Today's date – today's date and select FIND NOW.



6. Open one of the entries found by double-clicking the item in the list and mark the amount down to 10 dollars [Notice the option to Post in period of "Today's Date" or "Original Date"]. Select *Save* 💾, then *Form* → *Close* to exit the Expense Entry. This will show the Before and After entries for the item that was changed.

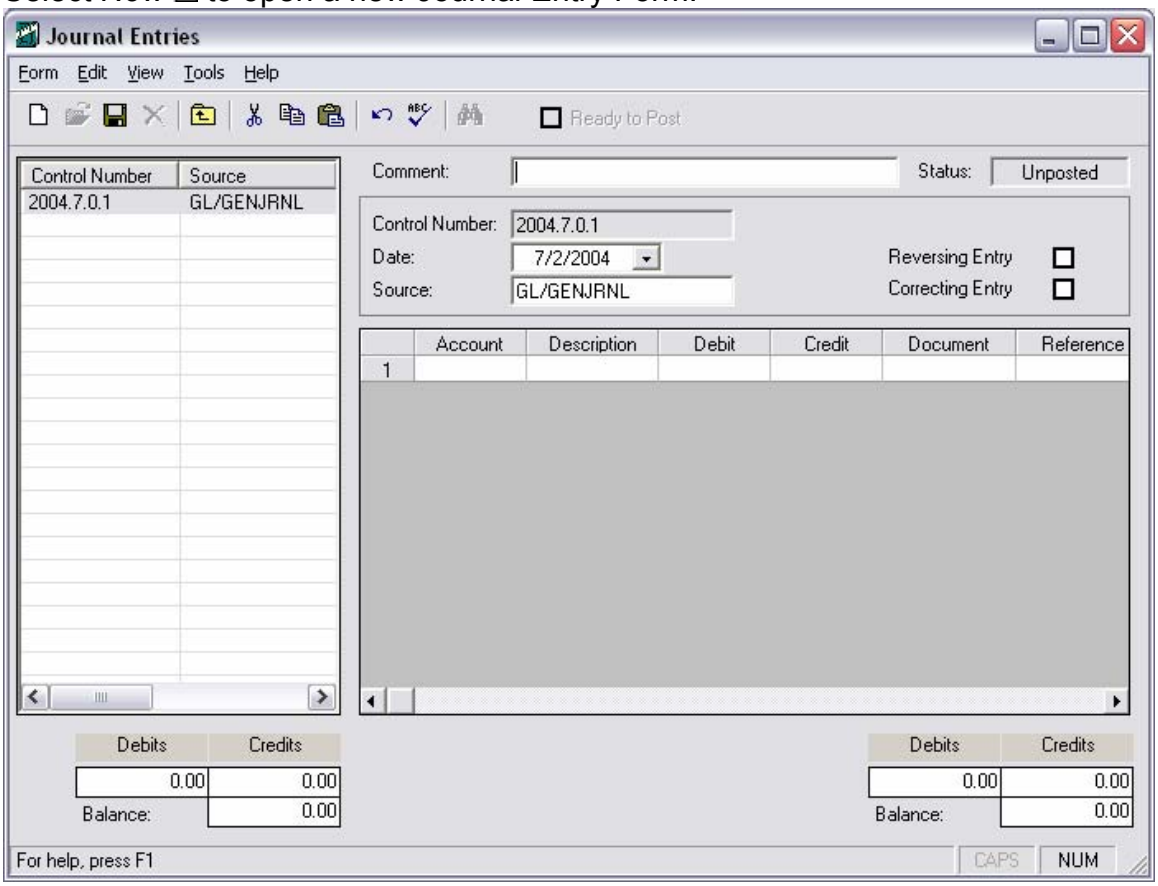
7. Select *Form* → *Close* to exit the batch. Posting is automatic.

Journal Entries

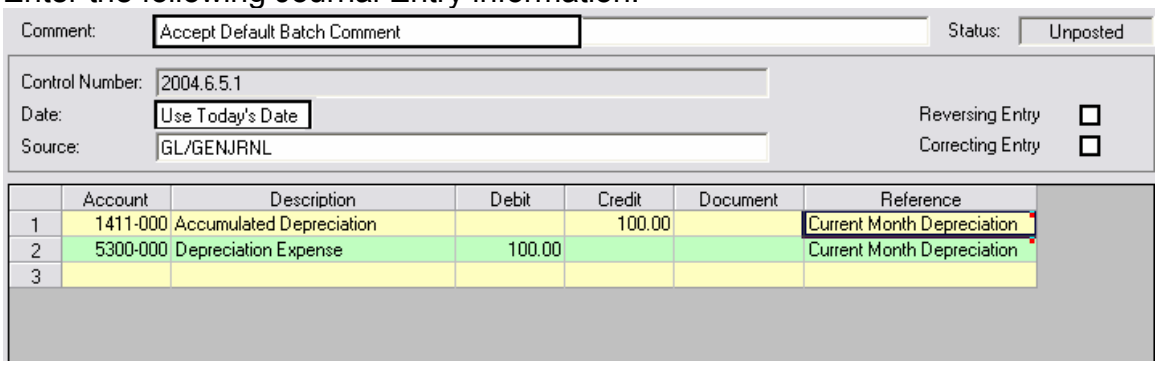
Time, Expense and Journal Entries all provide functions for importing entries into batches from external sources.

Exercise:

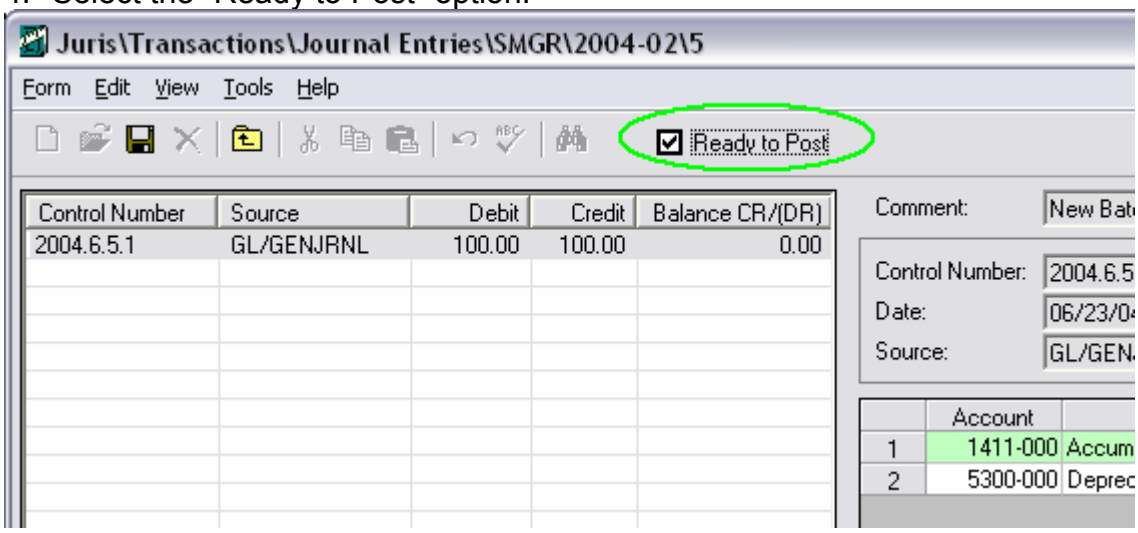
1. Select Transactions → Journal Entries
2. Select *New* to open a new Journal Entry Form.



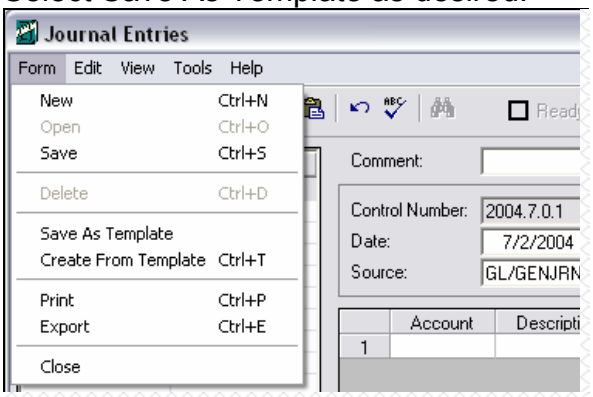
3. Enter the following Journal Entry information:



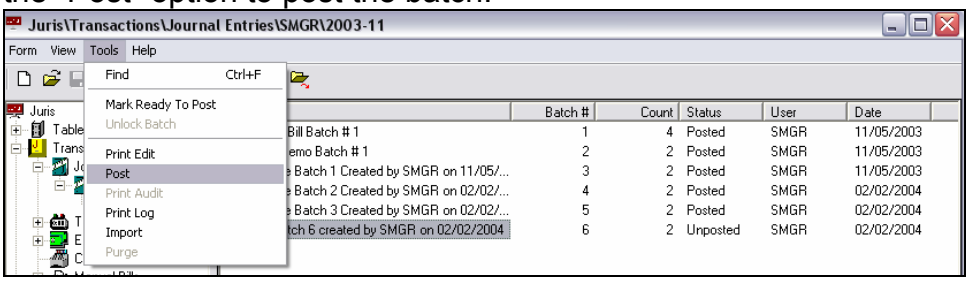
4. Select the “Ready to Post” option.



5. Select Save As Template as desired.



6. Select *Form* → *Close* to close the batch.
7. Click the batch to highlight it and from the Tools menu on the batch list, select the “Post” option to post the batch.



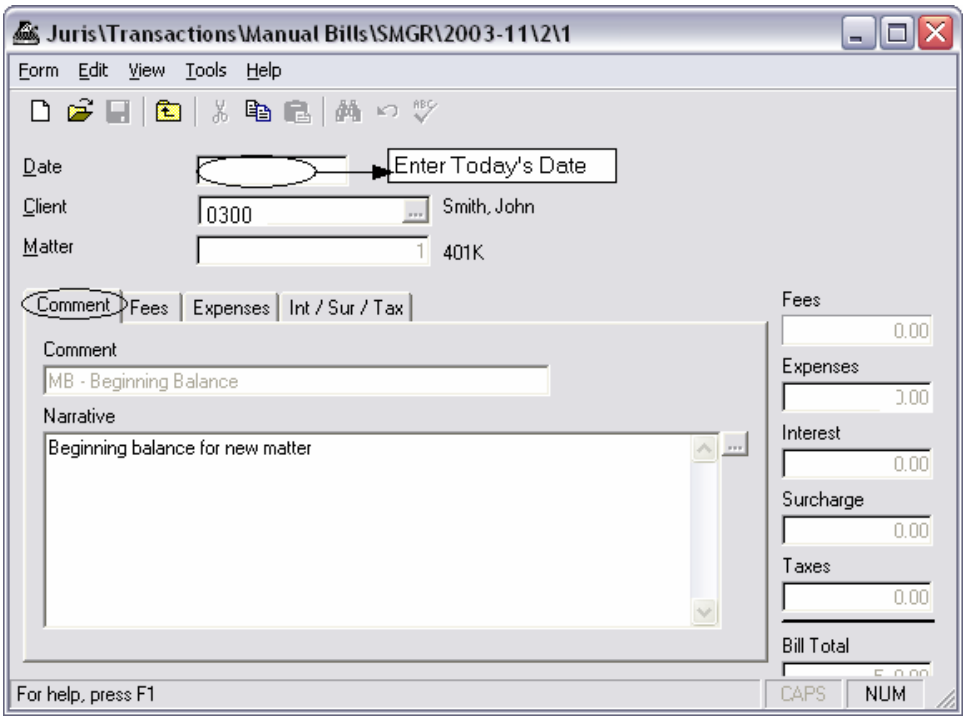
8. Select the batch and choose *Tools* → *Print Audit* (as desired)

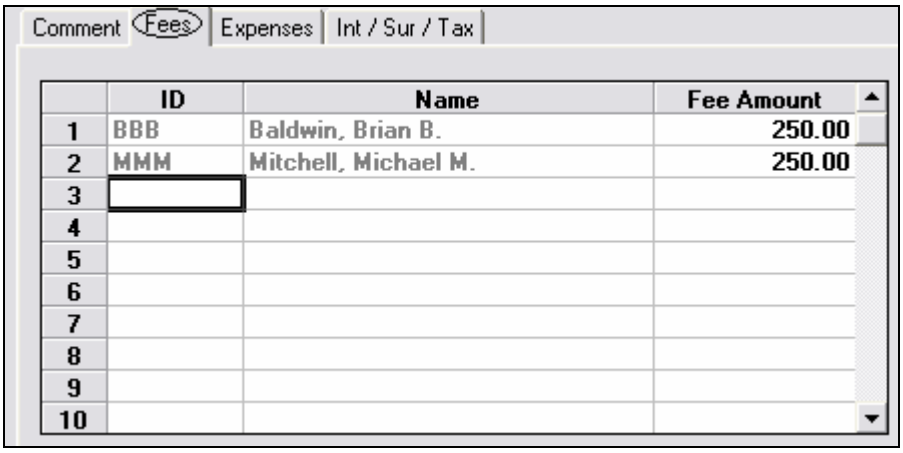
Manual Bills

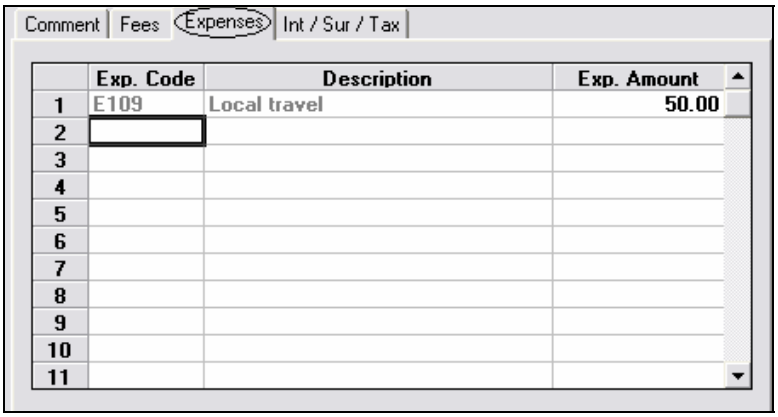
Manual Bills may be used to enter an A/R amount into the system for a matter whose bill was not generated by Juris. This is often used for beginning balances or for when a bill was manually created outside of Juris.

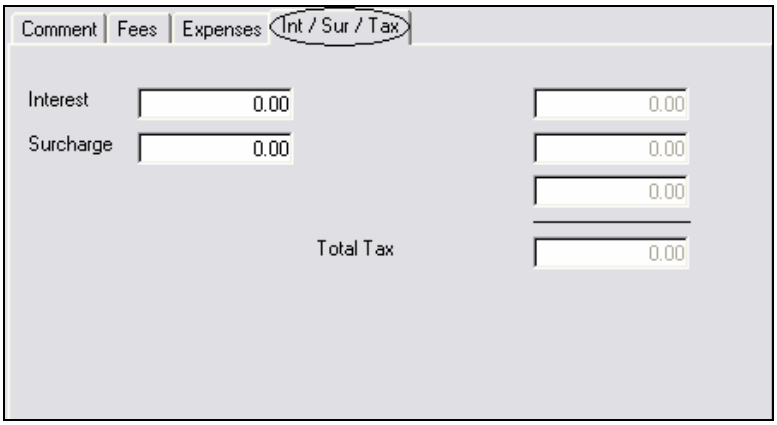
Exercise:

1. Select Transactions → Manual Bills
2. Select *New* to open a new Manual Bill Batch.
3. Select *New* to create a new manual bill in the batch. Enter the following bill information:









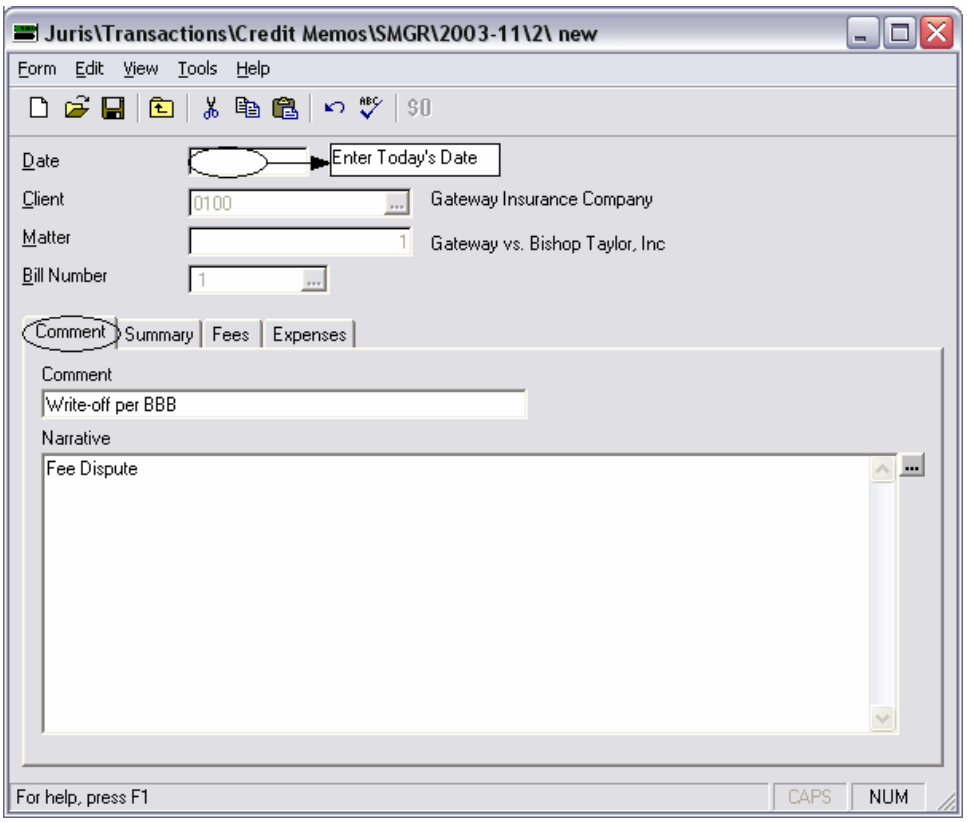
4. Select *Save* 💾, then *Form* → *Close* to exit the manual bills form.
5. Select *Form* → *Close* to exit the batch. Posting is not necessary.
6. Select the batch and choose *Tools* → *Print Audit* (as desired)

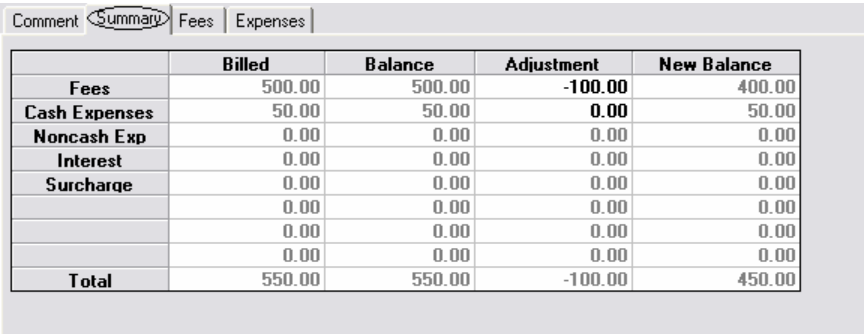
Credit Memos

Credit Memos are used to apply a credit to a client's bill.

Exercise:

1. Select Transactions → Credit Memos
2. Select *New* to open a new Credit Memo Batch.
3. Select *New* to create a new credit memo in the batch. Enter the following Credit Memo information:





Comment | Summary | Fees | Expenses

	Billed	Balance	Adjustment	New Balance
Fees	500.00	500.00	-100.00	400.00
Cash Expenses	50.00	50.00	0.00	50.00
Noncash Exp	0.00	0.00	0.00	0.00
Interest	0.00	0.00	0.00	0.00
Surcharge	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
Total	550.00	550.00	-100.00	450.00

Comment | Summary | Fees | Expenses

	ID	Name	Billed	Balance	Apply	New Balance
1	BBB	Baldwin, Brian B.	250.00	250.00	**-50.00**	200.00
2	MMM	Mitchell, Michael M.	250.00	250.00	**-50.00**	200.00
3		**Totals**	500.00	500.00	-100.00	400.00
4						
5						
6						
7						
8						
9						
10						
11						
12						

	ID	Name	Billed	Balance	Apply	New Balance
1	BBB	Baldwin, Brian B.	250.00	250.00	**0.00**	250.00
2	MMM	Mitchell, Michael M.	250.00	250.00	**-100.00**	150.00
3		**Totals**	500.00	500.00	-100.00	400.00
4						
5						
6						

For help, press F1 | CAPS | NUM

Comment | Summary | Fees | Expenses

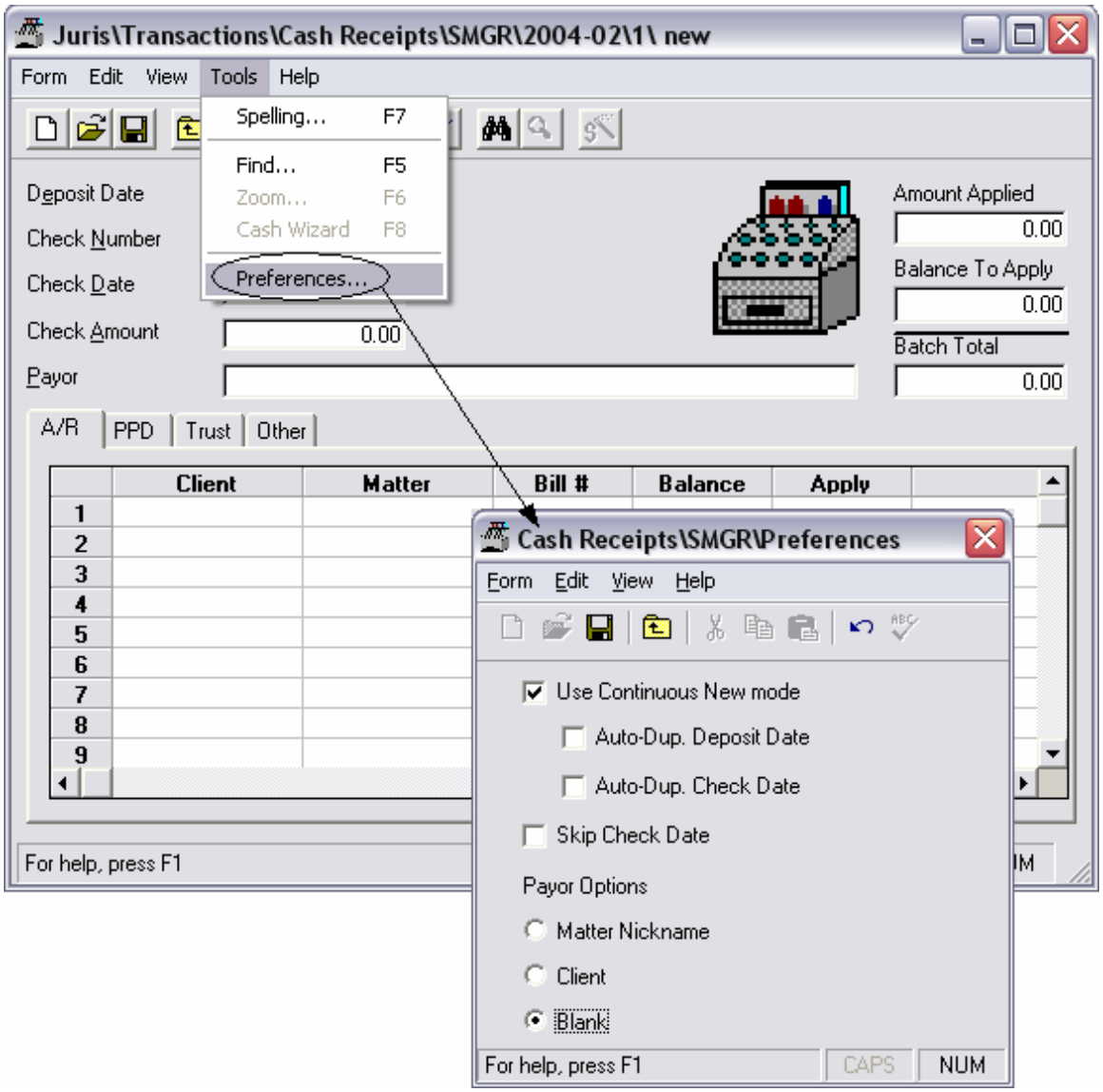
	Code	C/N	Description	Billed	Balance	Apply	New Balance
1	E109	C	Local travel	50.00	50.00	**0.00**	50.00
2			**Totals**	50.00	50.00	0.00	50.00
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

4. Select *Save* , then *Form* → *Close* to exit the Credit Memo entry.
5. Select *Form* → *Close* to exit the Credit Memo batch. Posting is unnecessary.
6. Select the batch and choose *Tools* → *Print Audit* (as desired)

Cash Receipts

The *Cash Receipts* function is used to apply funds received to client bills, prepaid funds, trust accounts and other deposits to the firm's bank accounts.

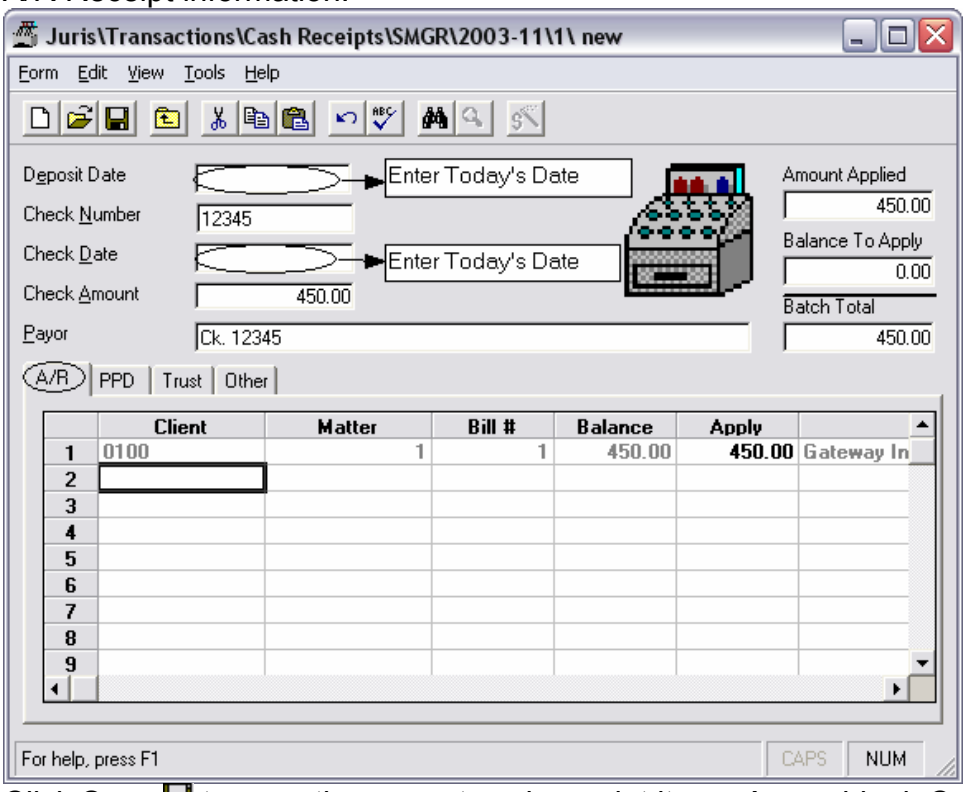
Cash Receipts - Preferences



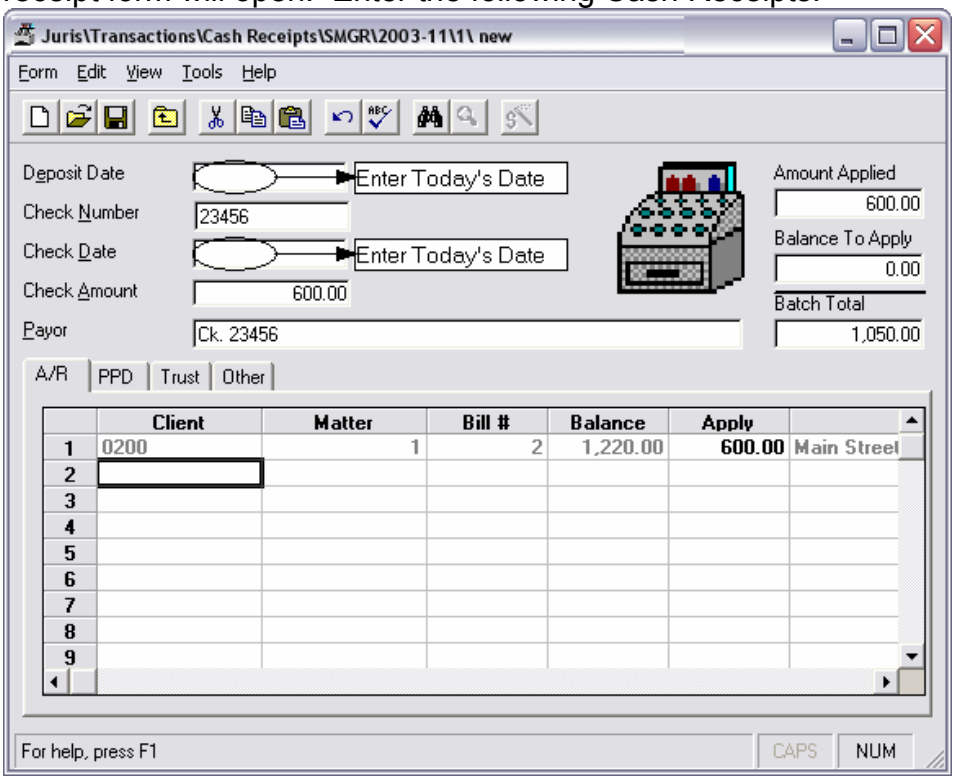
Exercise:

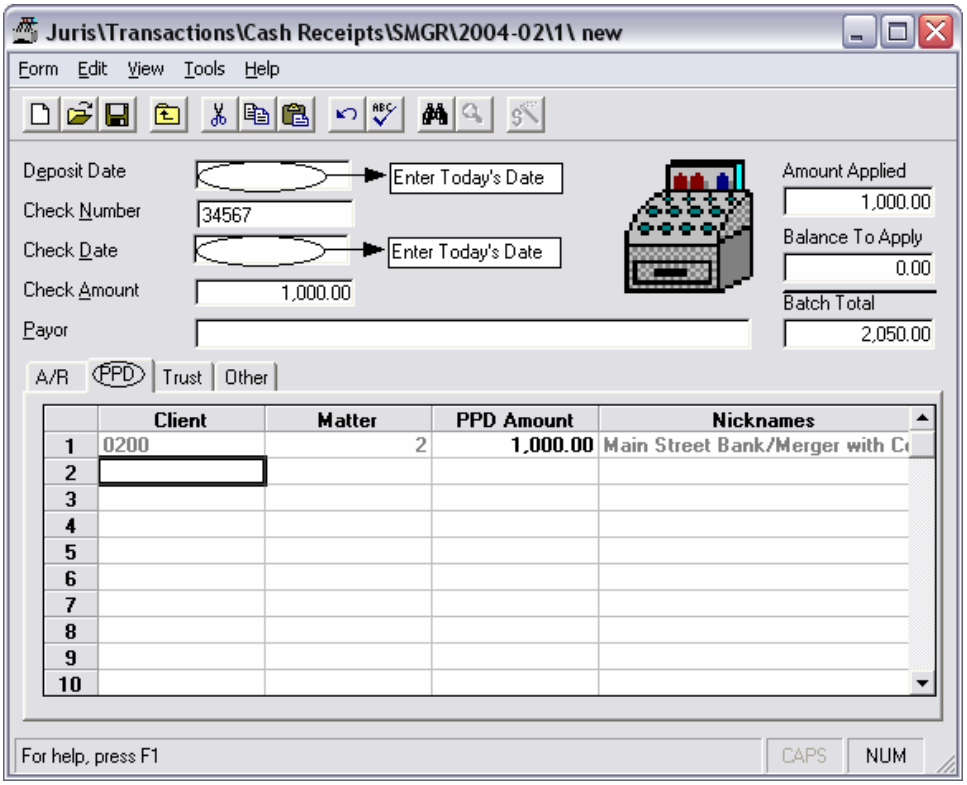
1. Select Transactions → Cash Receipts
2. Select *New* to open a new Cash Receipts Batch.

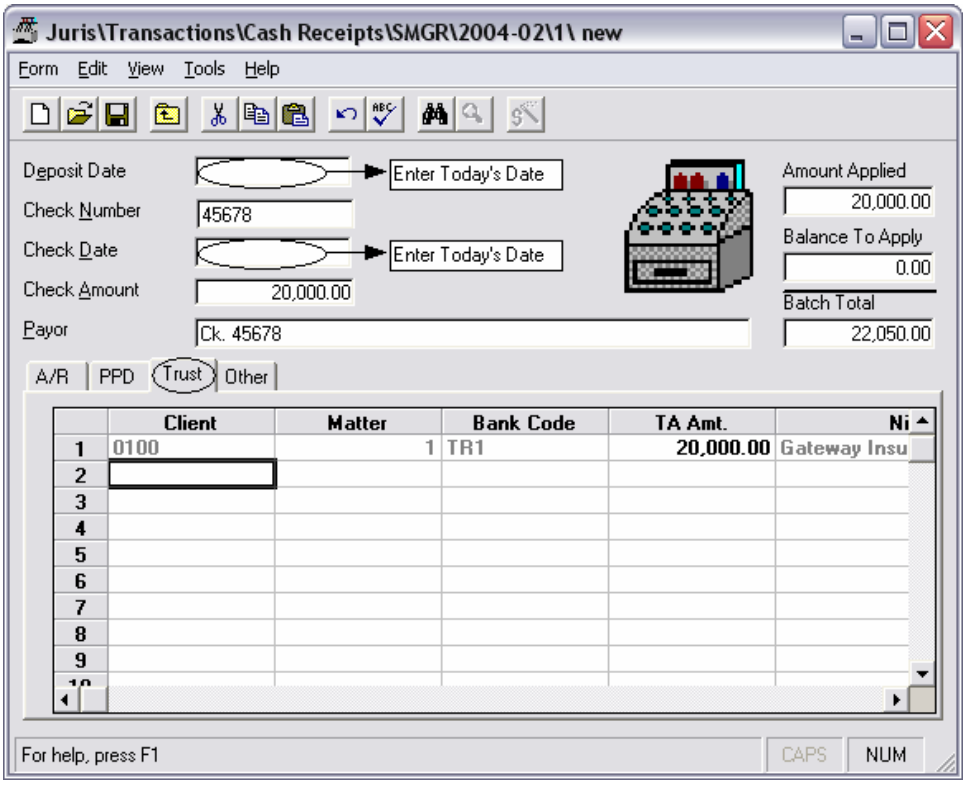
3. Select *New* 🗋 to create a new cash receipt in the batch. Enter the following A/R Receipt information:



4. Click Save 💾 to save the current cash receipt item. A new blank Cash receipt form will open. Enter the following Cash Receipts:

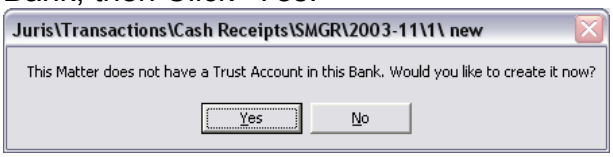


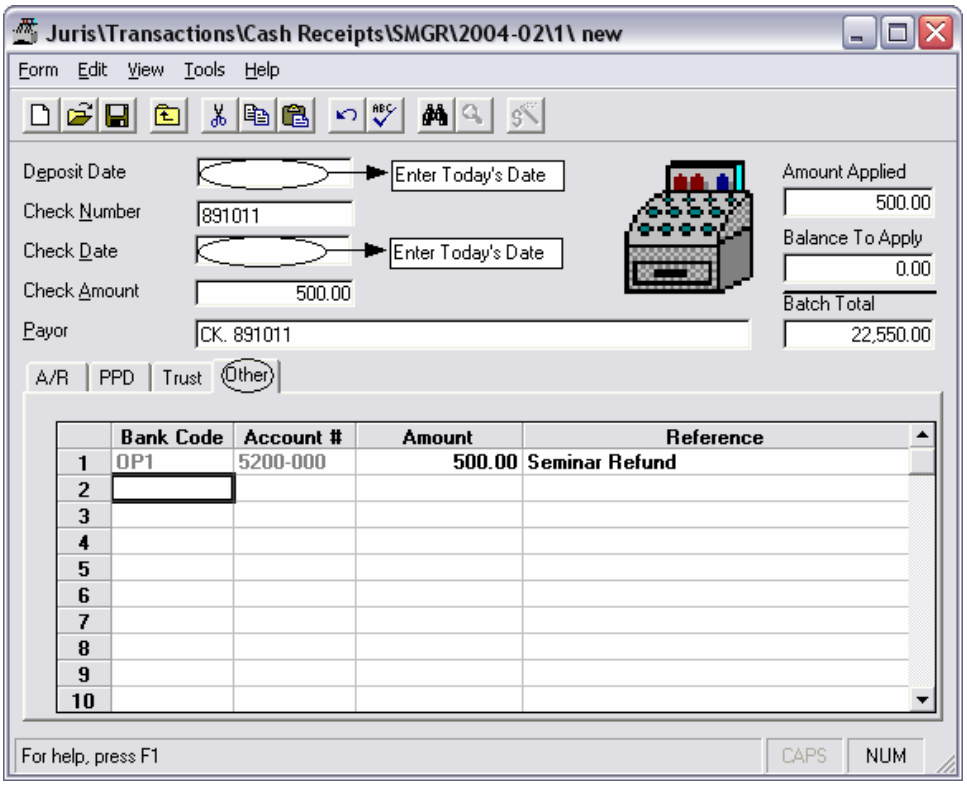




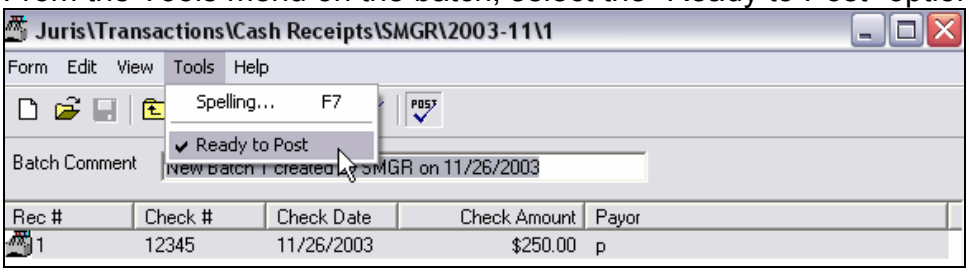
NOTE: When posting a Trust Receipt to a Matter for the first time, you will be notified “This Matter does not have a Trust Account in this Bank. Would you

like to create one?” Verify that you have chosen the correct Client, Matter and Trust Bank, then Click “Yes.”



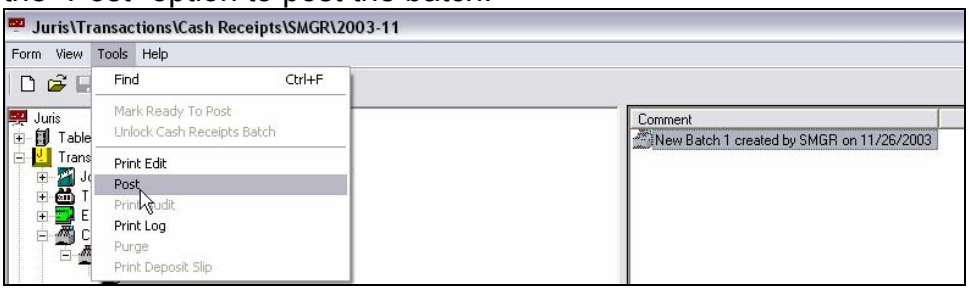


5. Select *Save* 💾, then *Form* → *Close* to exit the Cash Receipt batch.
6. From the Tools menu on the batch, select the “Ready to Post” option.



7. Select *Form* → *Close* to close the batch.

8. Click the batch to highlight it and from the Tools menu on the batch list, select the “Post” option to post the batch.



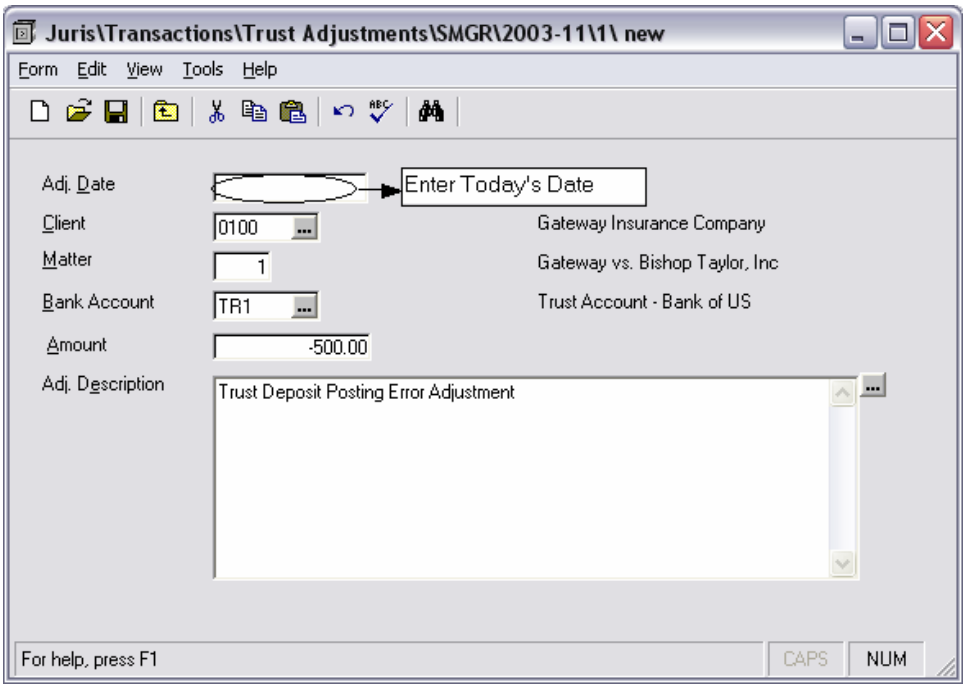
9. Select the batch and choose *Tools → Print Audit* or *Print Deposit Slip* (as desired)

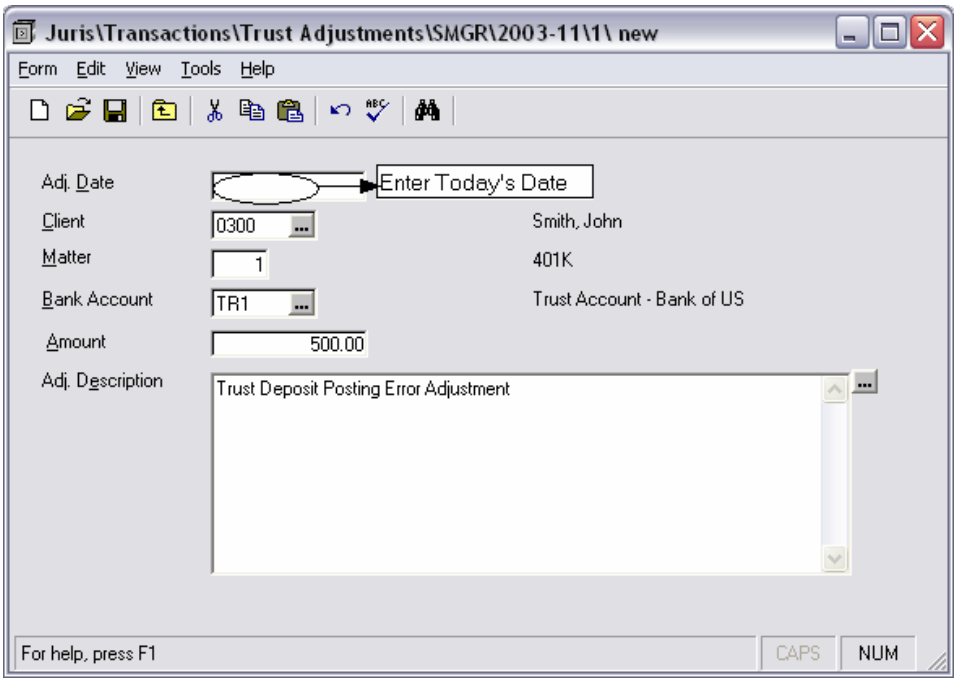
Trust Adjustments

The *Trust Adjustment* function is used to make an adjustment to a trust account.

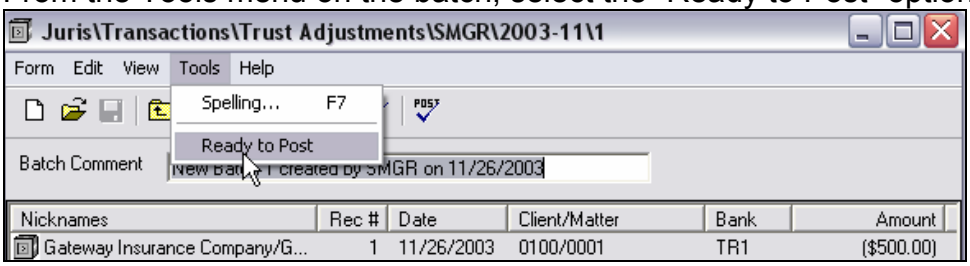
Exercise:

1. Select Transactions → Trust Adjustments
2. Select *New* to open a new Trust Adjustments Batch. Select *New* to create a new trust adjustment in the batch. Enter the following Trust Adjustment information:



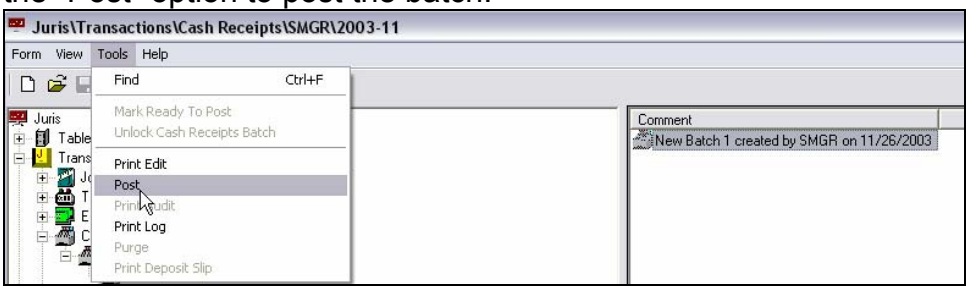


4. Select *Save* , then *Form* → *Close* to exit the Trust Adjustment entry.
5. From the Tools menu on the batch, select the "Ready to Post" option.

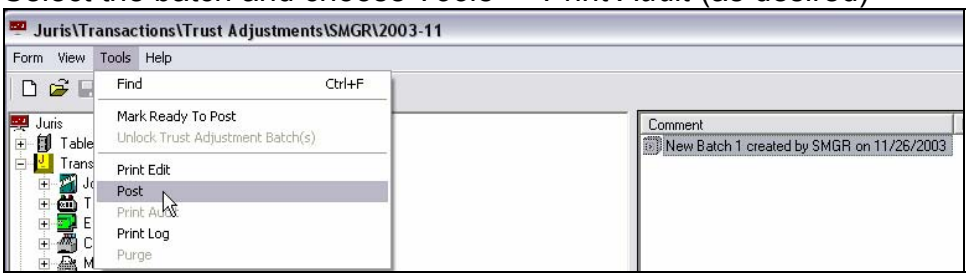


6. Select *Form* → *Close* to close the batch.

7. Click the batch to highlight it and from the Tools menu on the batch list, select the “Post” option to post the batch.



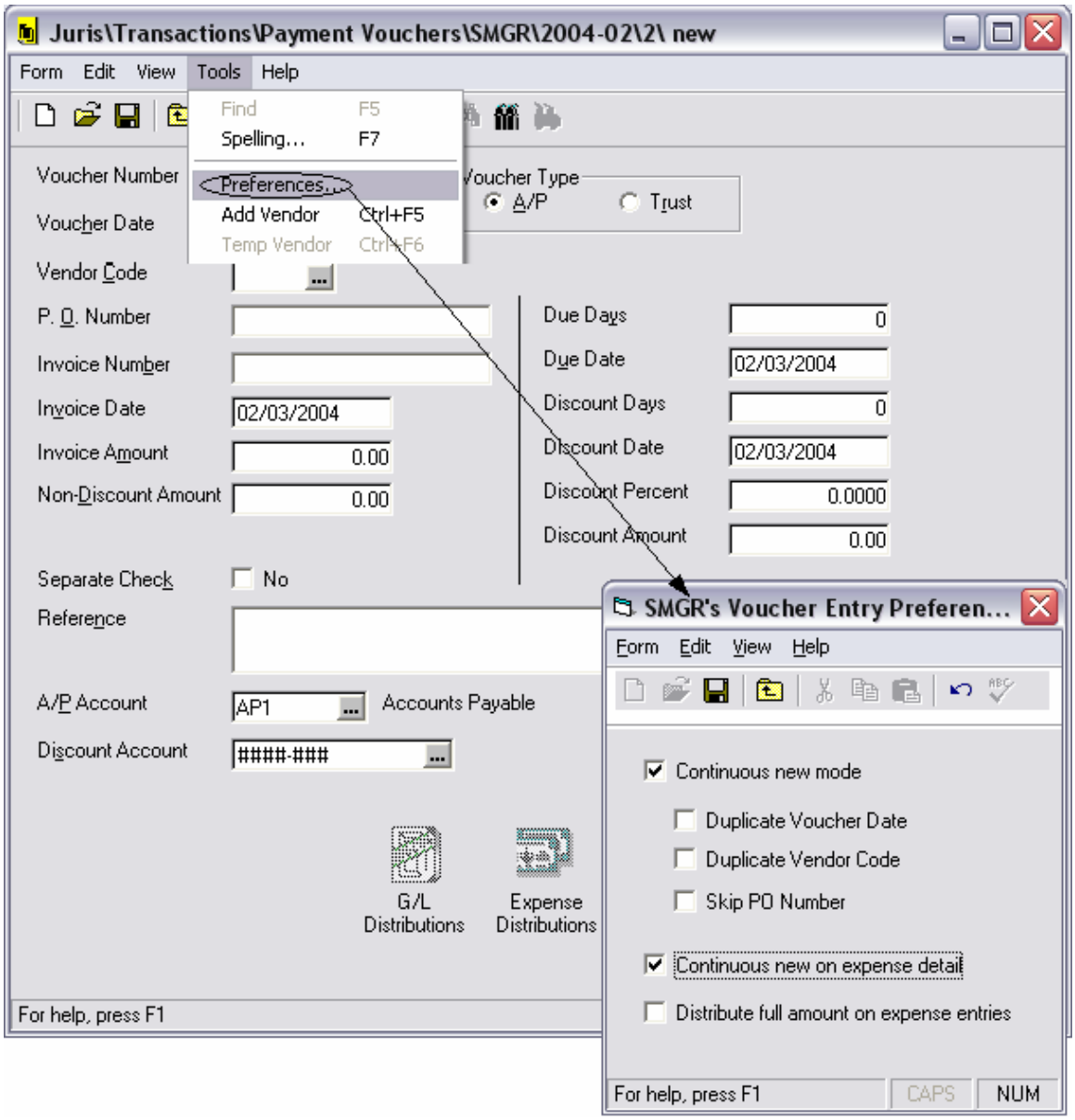
8. Select the batch and choose *Tools* → *Print Audit* (as desired)



Payment Vouchers

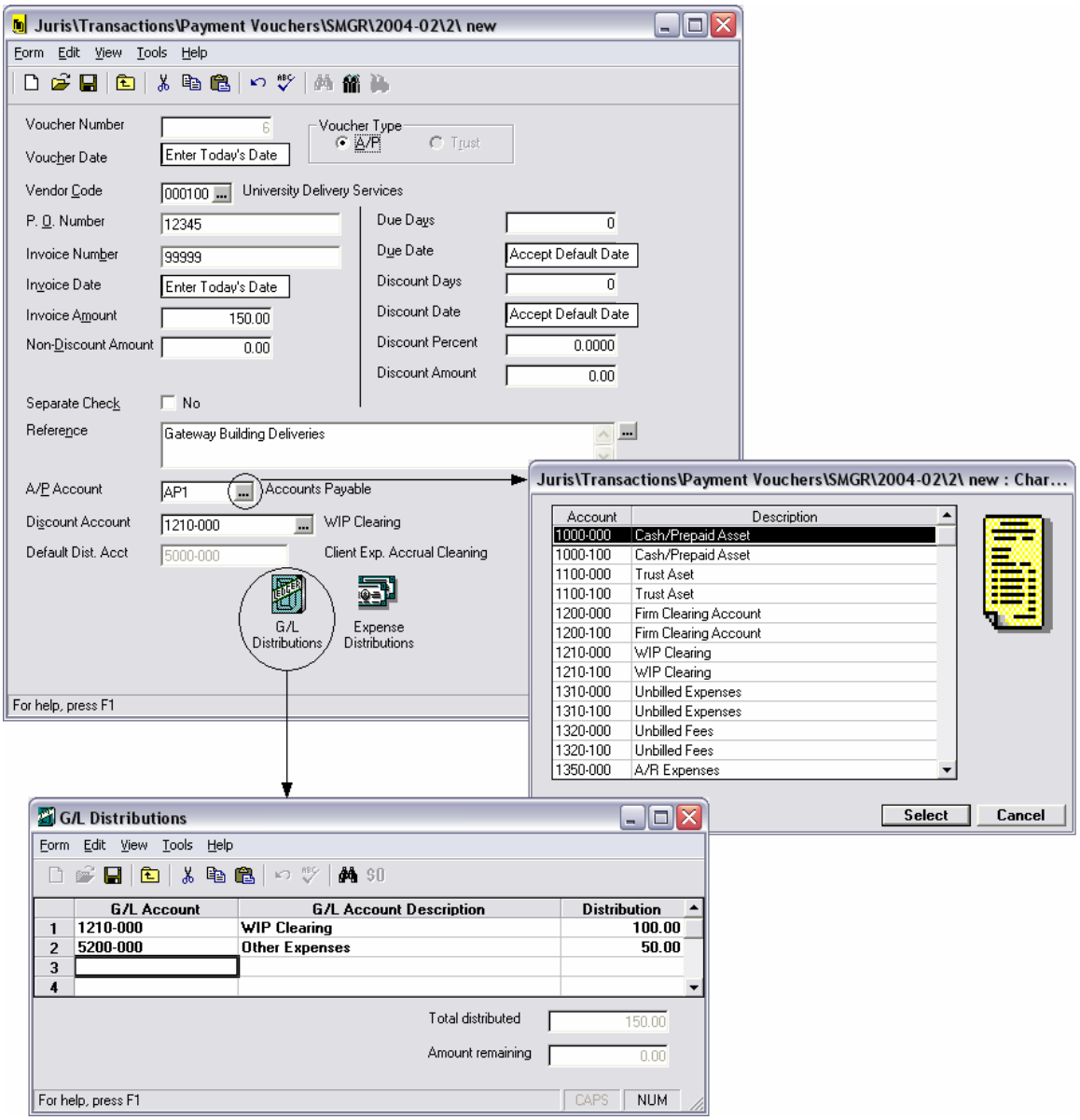
Payment Vouchers are used to record payments made to vendors. These expenses may be distributed to clients and matters at the time they are entered into the system. Checks may be automatically generated based on the vouchers in the system.

Payment Voucher Preferences

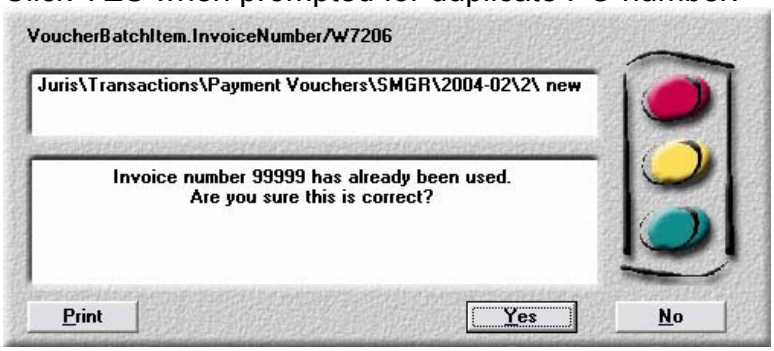


Exercise:

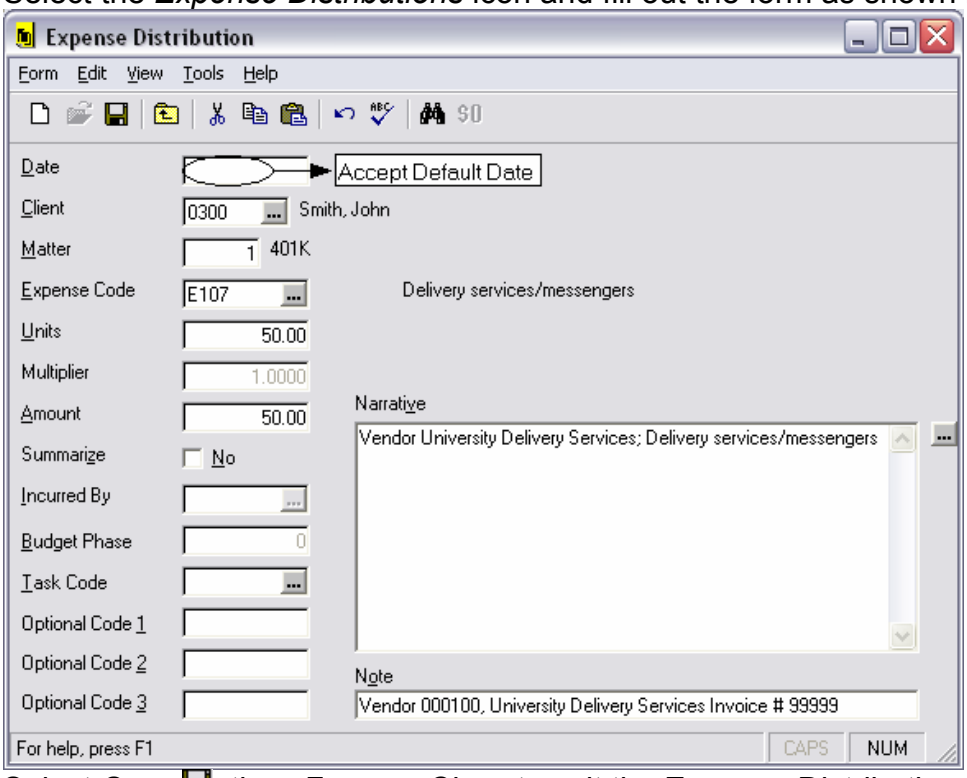
1. Select Transactions → Payment Vouchers
2. Select *New* to open a new Payment Voucher Batch.
3. Select *Newt* to create a new payment voucher in the batch. Enter the following Payment Voucher information:



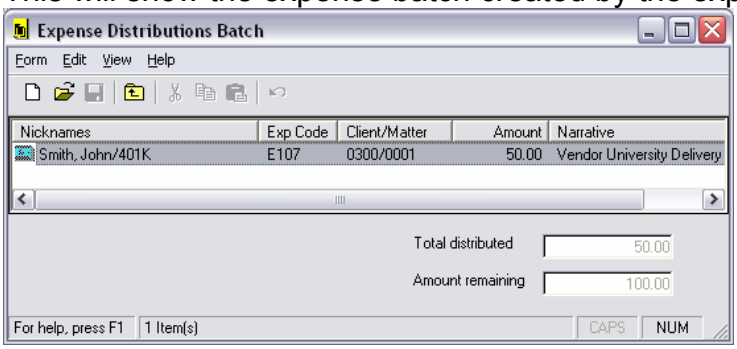
Click YES when prompted for duplicate PO number.



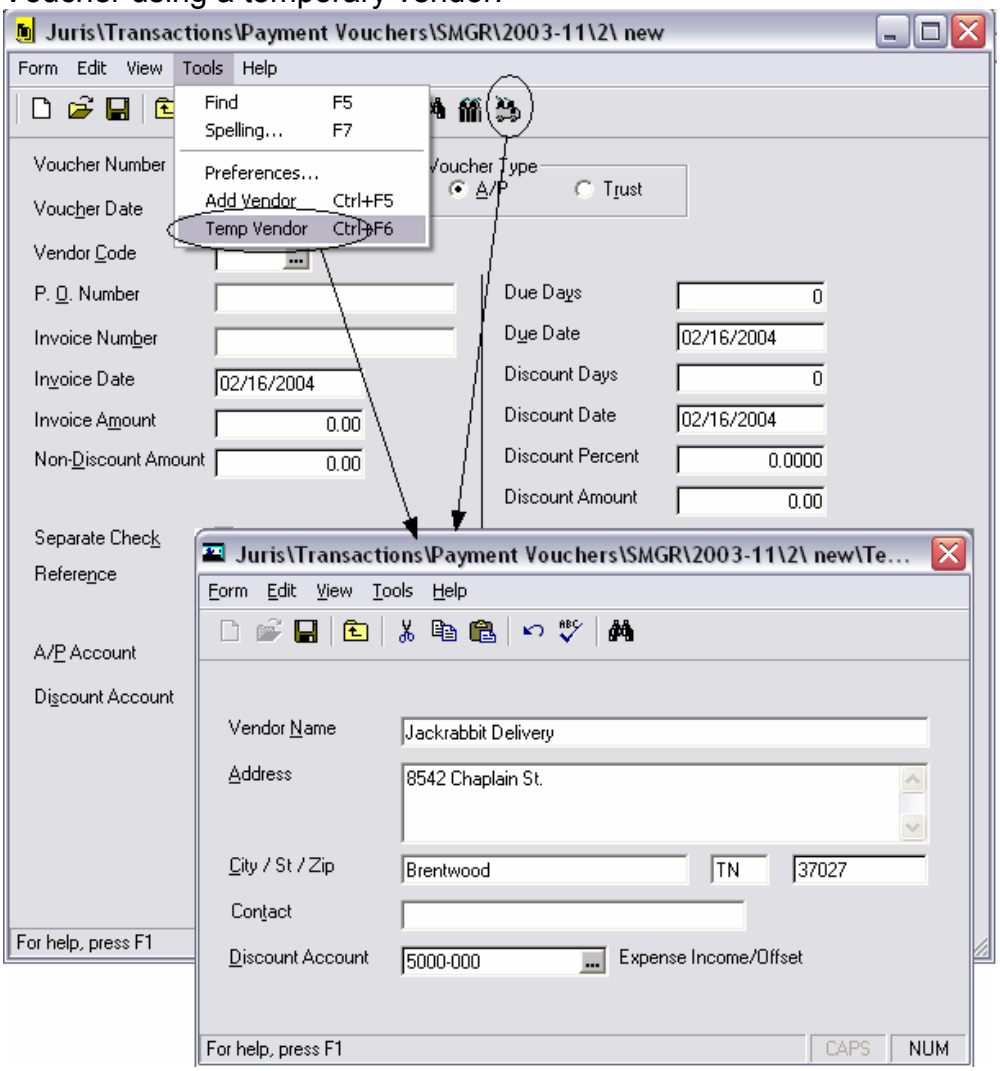
4. Select the *Expense Distributions* icon and fill out the form as shown below:



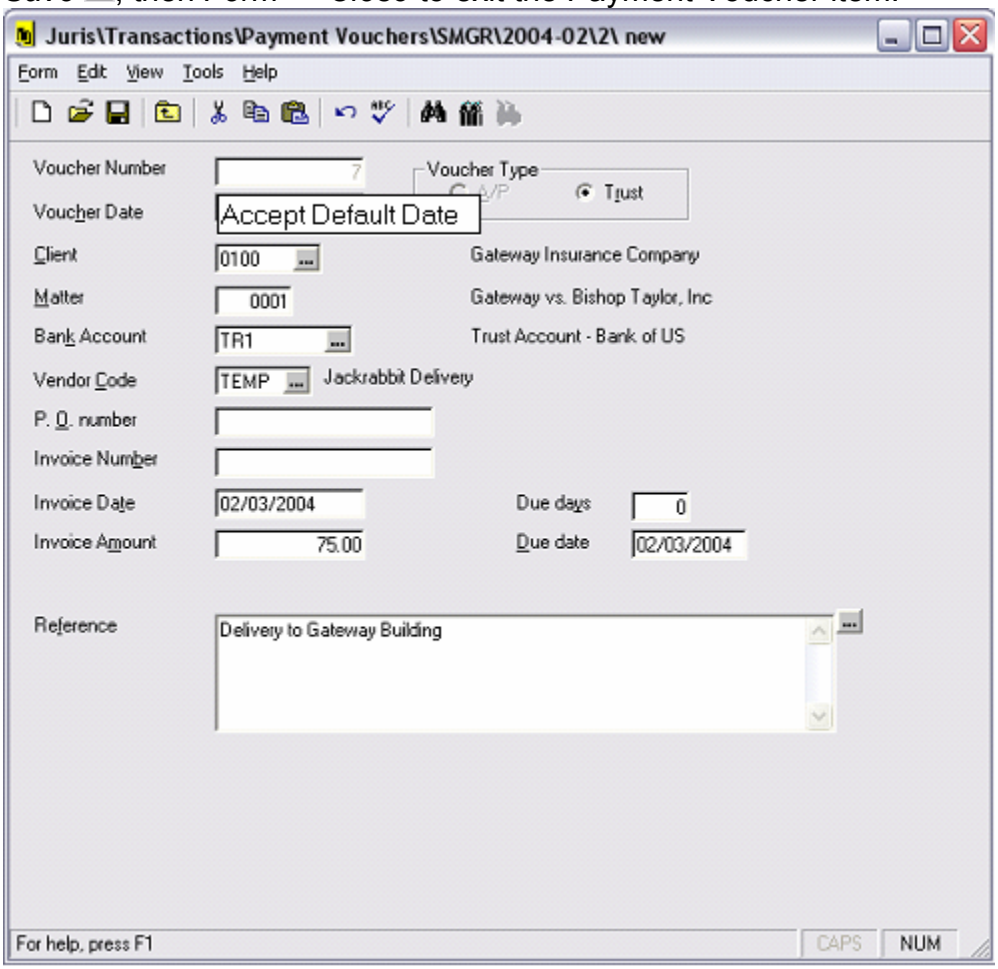
5. Select *Save* , then *Form* → *Close* to exit the Expense Distribution form. This will show the expense batch created by the expense distribution:



6. *Select Form → Close* to return to the Payment Voucher. Save the item and a new blank Payment Voucher form will open. Enter the following Payment Voucher using a temporary vendor:

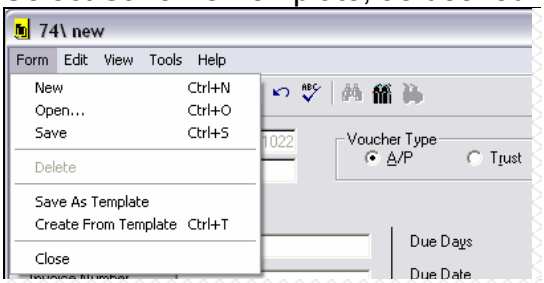


7. Now enter the values for a Trust Voucher as shown in the form below. Select *Save* 🖫, then *Form* → *Close* to exit the Payment Voucher item.



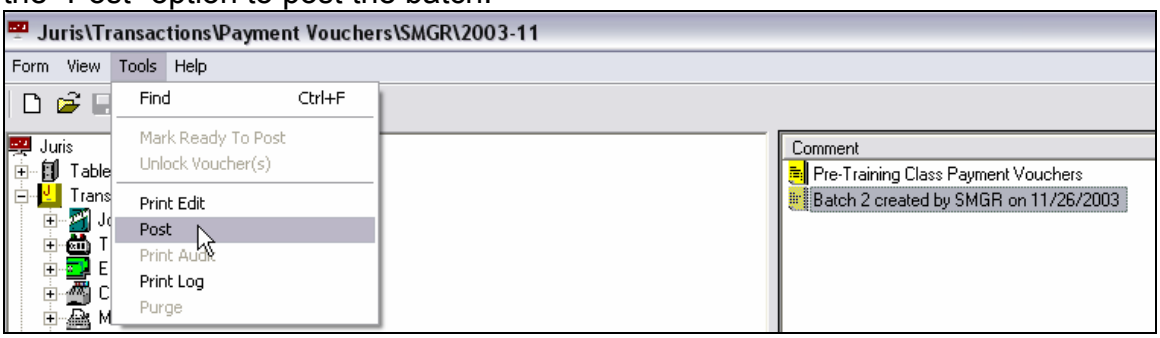
8. Select *Form* → *Close* to exit the Payment Voucher batch.
9. From the Tools menu on the batch, select the "Ready to Post" option.

10. Select Save As Template, as desired.



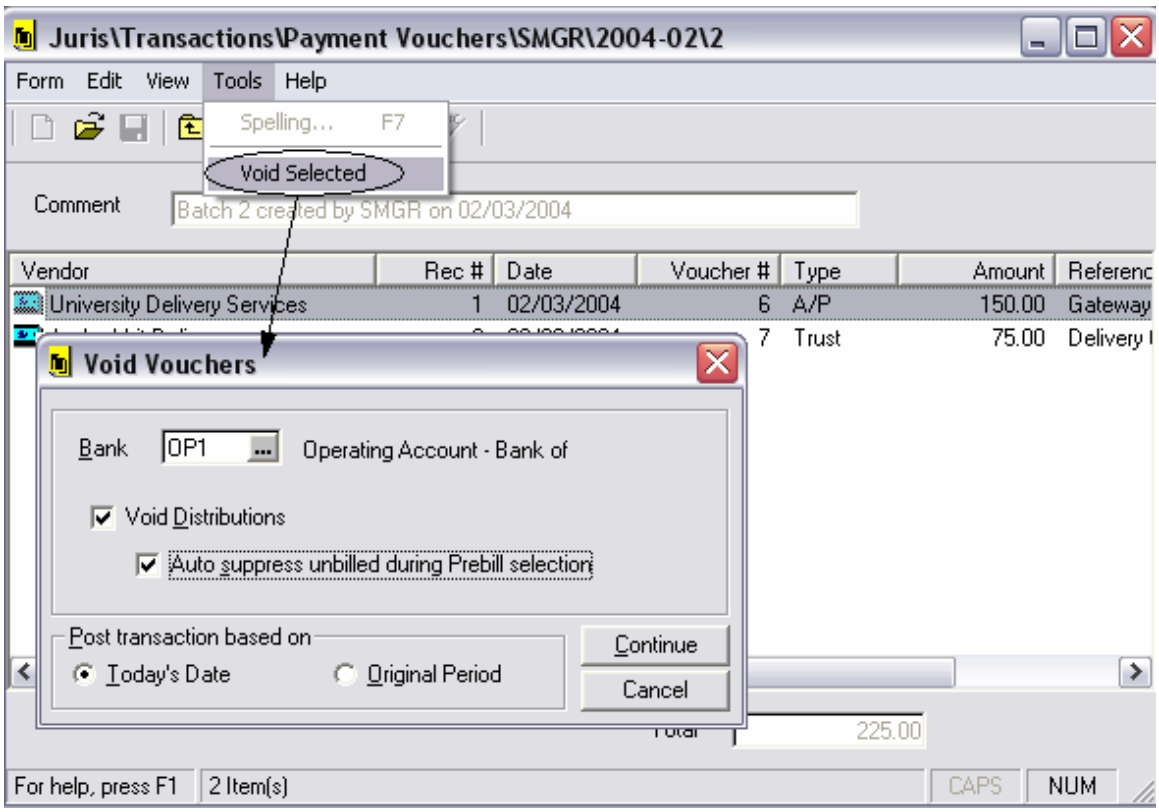
11. Select *Form* → *Close* to close the batch.

12. Click the batch to highlight it and from the Tools menu on the batch list, select the “Post” option to post the batch.



13. Select the batch and choose *Tools* → *Print Audit* (as desired)

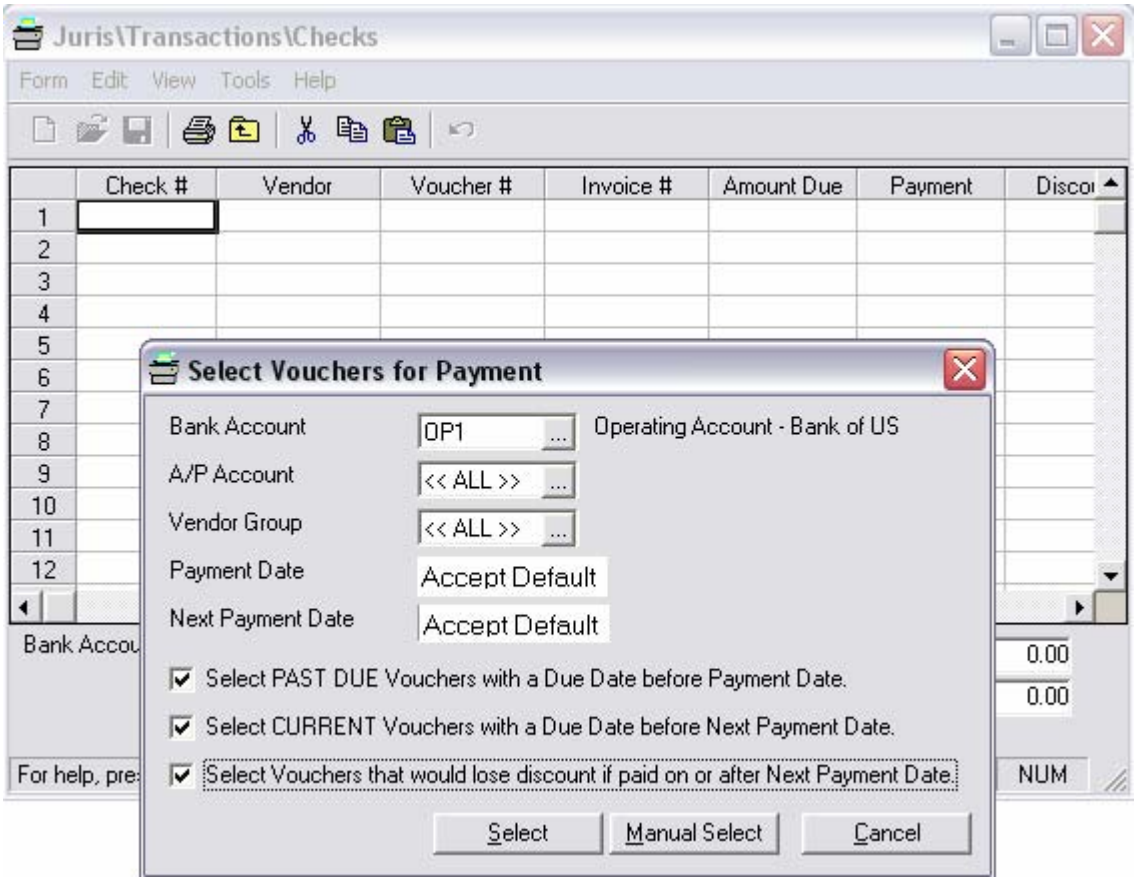
Void Payment Voucher



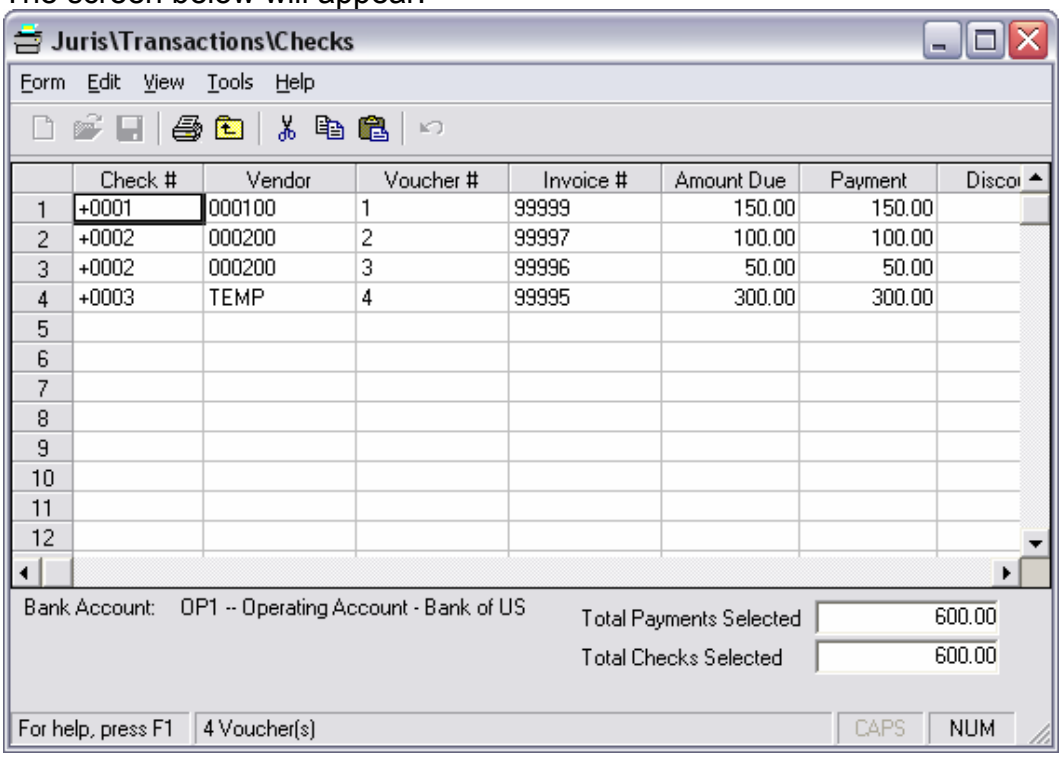
Checks

Exercise:

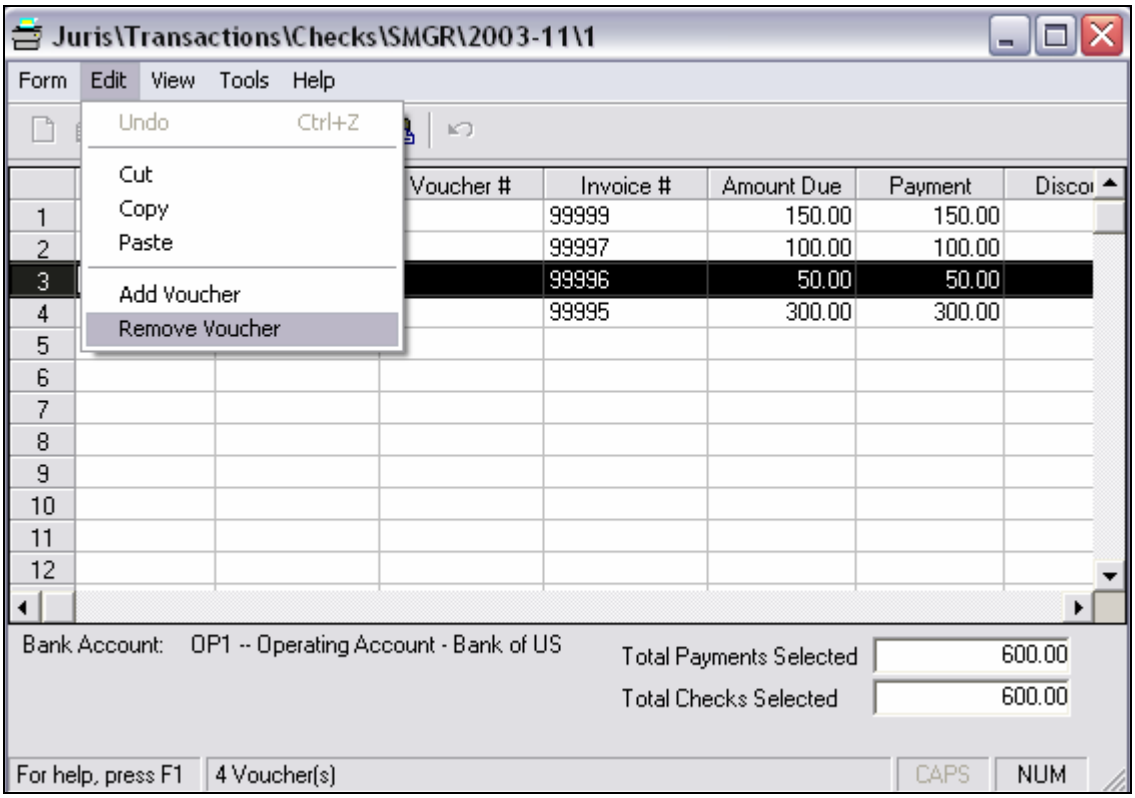
1. Select Transactions → Checks
2. Select *New* to open a new Checks batch. A screen similar to the one shown below will appear. Fill out the selection options as shown and click *Select*.



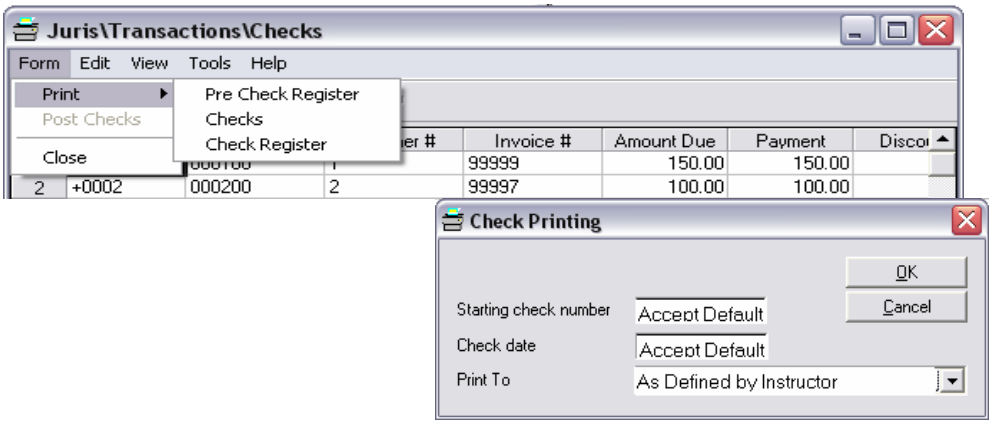
3. The screen below will appear:



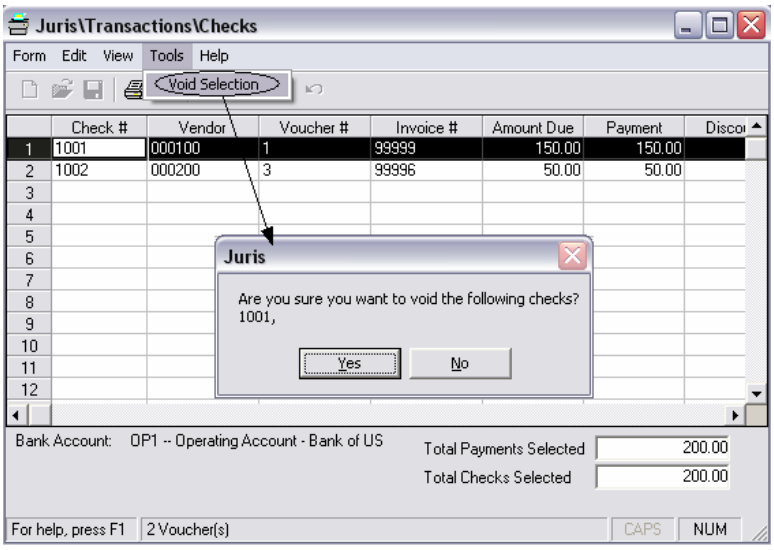
4. Remove the item by highlighting the row and selecting to remove the voucher as shown below:



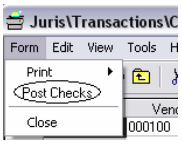
5. Select *Form* → *Print* and choose “Pre Check Register.” Choose a printer and click OK. (Optional)
6. Select *Form* → *Print* and choose “Checks.” Accept the default check number and date and click OK.



7. Void the first check as shown below:



8. Select *Form → Post.*



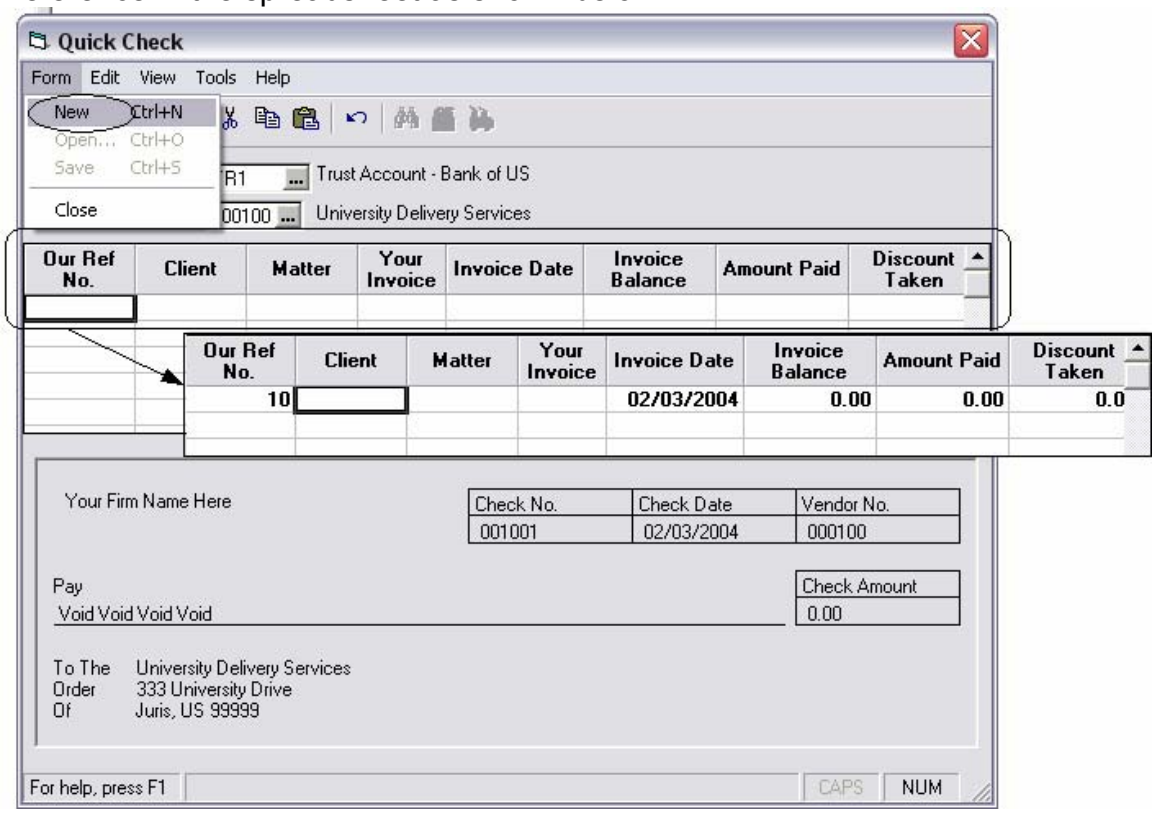
9. Select *Form → Print* and choose “Check Register” (optional).
10. Select *Form → Close* to close the Check form.

Quick Checks

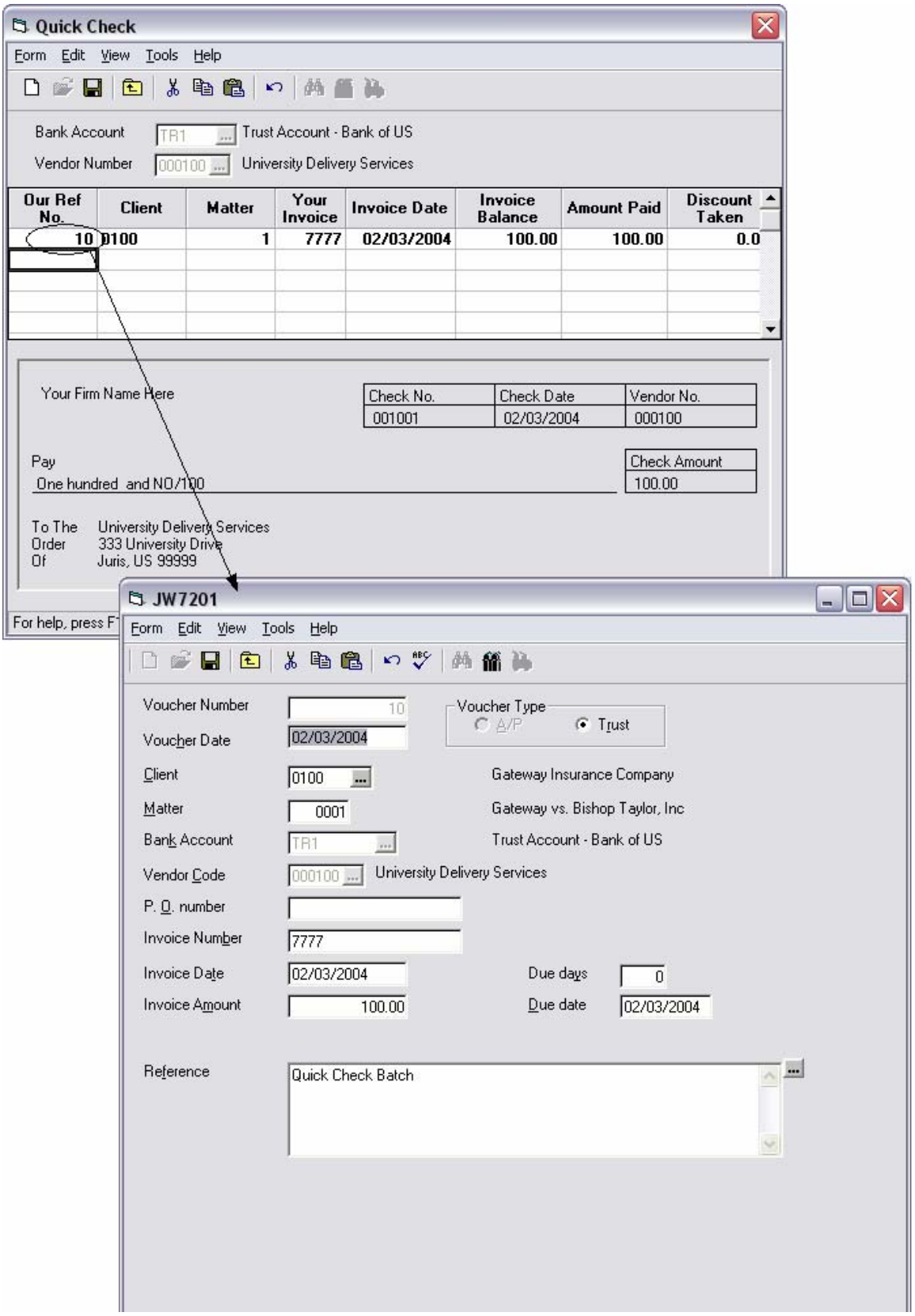
Quick Checks is a way to enter a check into the system on-the-fly.

Exercise:

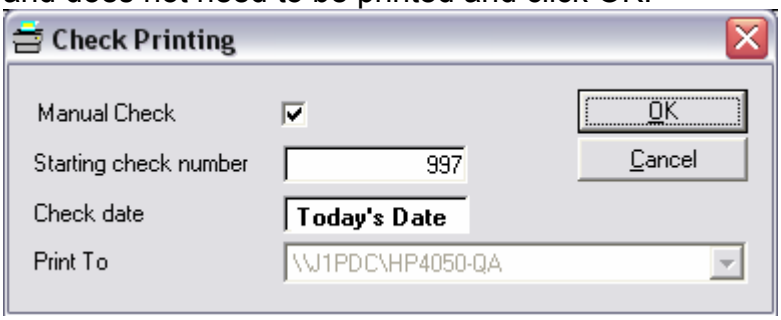
1. Select Transactions → Quick Checks
2. Select *New* to open a new Quick Checks Batch.
3. Select *New* to open a new Quick Checks form.
4. Enter the bank account TR1 (Trust Account – Bank of US) and the Vendor 100 (University Delivery Services), then select the *New* to open a new Reference in the spreadsheet as shown below:



5. Enter the information as shown below.



6. Select *Save* , which will open the form below:
7. Check the Manual Check box to indicate that the check was manually written and does not need to be printed and click OK.



8. Select *Form* → *Close* to close the Quick Check form.
9. Select *Form* → *Close* to close the Quick Check batch. Posting is not necessary.

Recurring Transactions

Recurring Transactions are used to enter a repetitive, recurring item and schedule it to occur automatically. Before recurring transactions may be scheduled, transaction templates must be created. The templates may then be assigned to a schedule or schedules. The Transaction template determines the transaction details and the notification list, and the schedule determines when the notifications should appear.

Transaction Templates

Transaction Templates may be created for Journal Entries or Vouchers. The Template will include the static details of the transaction, which enables the system to pre-populate the transaction with the appropriate information when it is time to perform the transaction.

Exercise:

1. Select Transactions → Recurring Transactions → Journal Entry Templates
2. Select *New* to open a new Journal Template.
3. Enter the following Journal Entry:

Code: MODP
Comment: Accept Default Comment
Notification List: SMGR
Created By: SMGR 06/23/04
Modified By: SMGR 06/23/04
Source: GL\GENJRNL
Date: Scheduled Date + 0 Days
Reversing Entry ☐
Correcting Entry ☐

	Account	Description	Debit	Credit	Document	Reference
1	1411-000	Accumulated Depreciation		100.00		Monthly Depreciation
2	5300-000	Depreciation Expense	100.00			Monthly Depreciation
3						

Debits	Credits
100.00	100.00
Balance:	0.00

4. Select *Save*, then *Form* → *Close* to exit the Journal Template form
5. Select Transactions → Recurring Transactions → Voucher Templates

6. Select *New* to open a new Voucher Template.
7. Enter the following Voucher Template:

Juris\Transactions\Recurring Transactions\ new

Form Edit View Tools Help

What schedules has this item joined?

Code: MOPY
Comment: Accept Default Comment
Notification List: SMGR
Voucher Date: Current Date + 0 Days

Created By: SMGR 06/23/04
Modified By: SMGR 06/23/04

Vendor Code 000001 Firm
Default Distribution Account: 5200-000 Other Expenses

P. O. Number
Invoice Number
Invoice Date Current Date + 0 Days
Invoice Amount 250,000.00 Distributions
Non-Discount Amount 0.00
Separate Check No

A/P Account AP1 AP1
Discount Account 5200-000 Other Expenses
Due Date Current Date + 0 Days
Discount Date Current Date + 0 Days
Discount Percent Vendor Default 0.0000
Reference
Monthly Payroll Expense

For help, press F1 CAPS NUM

8. Select *Save*, then *Form* → *Close* to exit the Voucher Template form

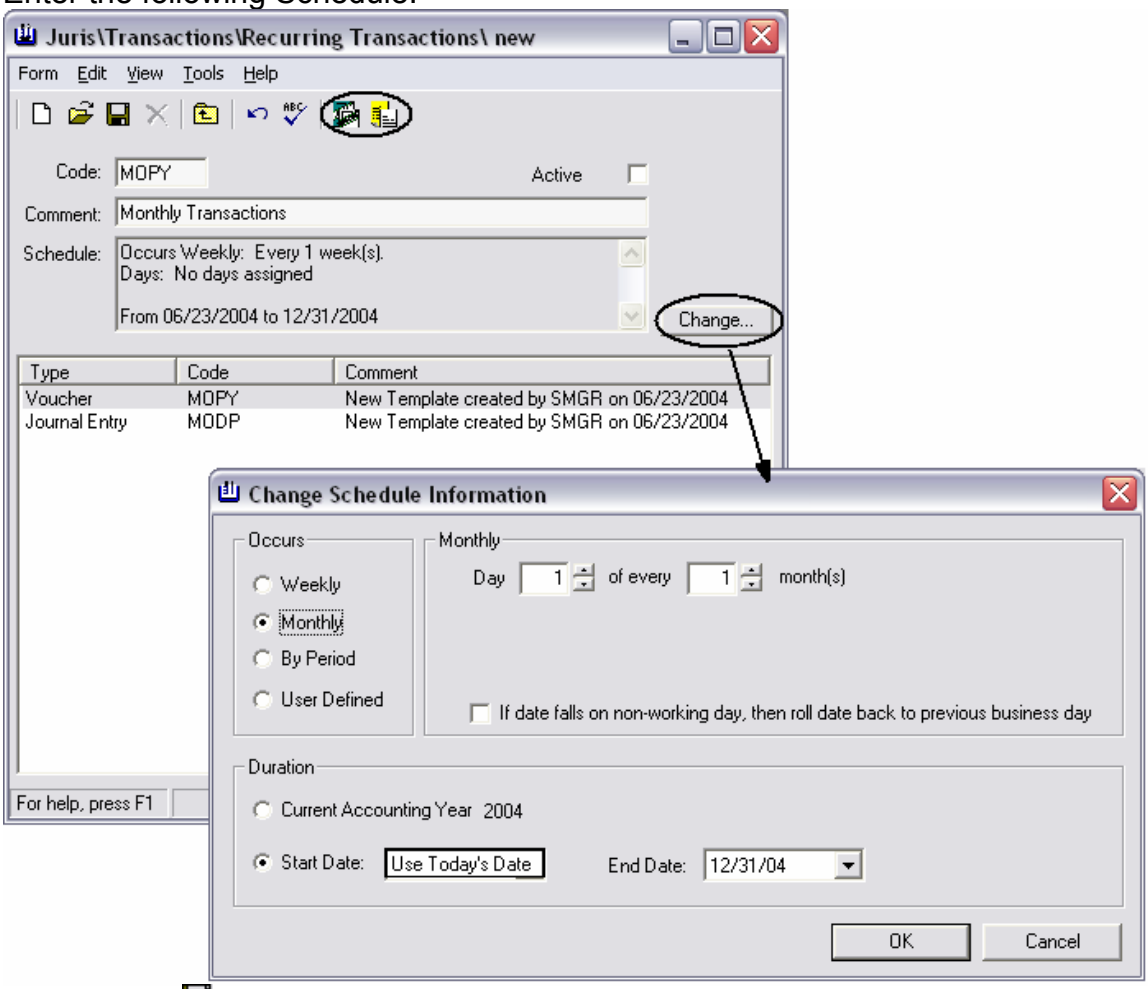
Schedules

Schedules determine when notifications for recurring transactions should appear. The system knows which users should be notified by referring to the notification list on the Transaction Template. A schedule should include at least one Transaction Template, but may include more.

Exercise:

1. Select Transactions → Recurring Transactions → Schedules
2. Select *New* to open a new Schedule.

3. Enter the following Schedule:



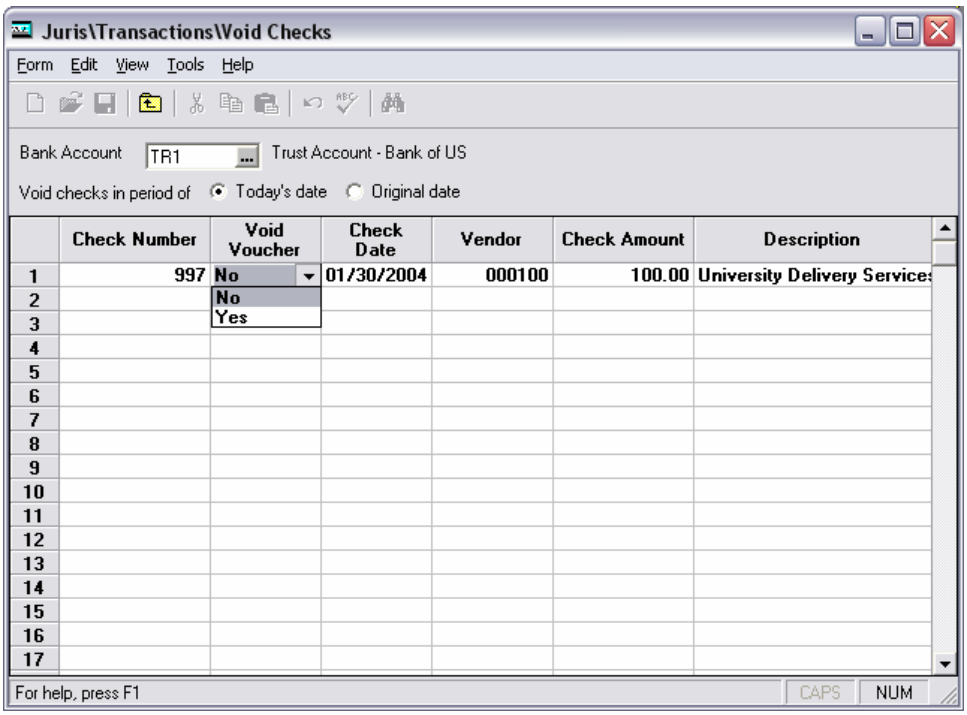
4. Select *Save* 💾, then *Form* → *Close* to exit the Schedule form
5. Close Juris and reopen. Review the Notification options.

Void Checks

The *Void Checks* feature allows checks written to be voided. The user also has the option to void the voucher associated with the check when the check is voided.

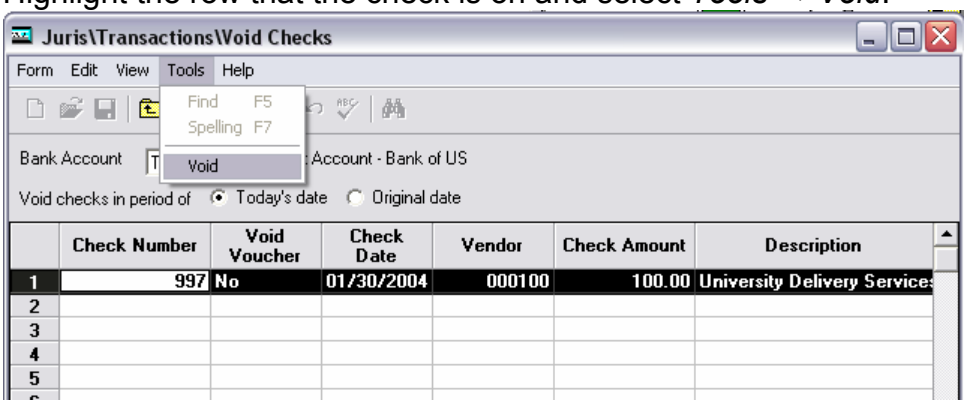
Exercise:

1. Select Transactions → Void Check
2. Select a bank account (TR1) and a check should appear in the spreadsheet as shown below:

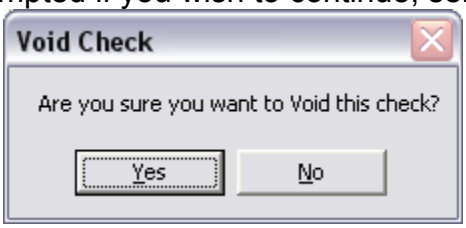


3. Choose to Void the check in the period of “Today’s Date”.
4. Set the “Void Voucher” option from NO to YES.

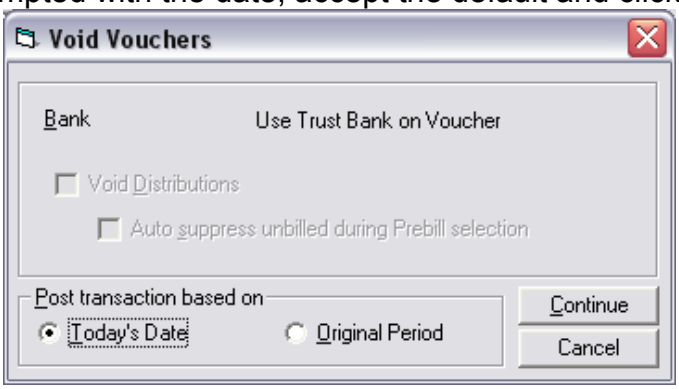
5. Highlight the row that the check is on and select *Tools* → *Void*.



6. When prompted if you wish to continue, select YES.

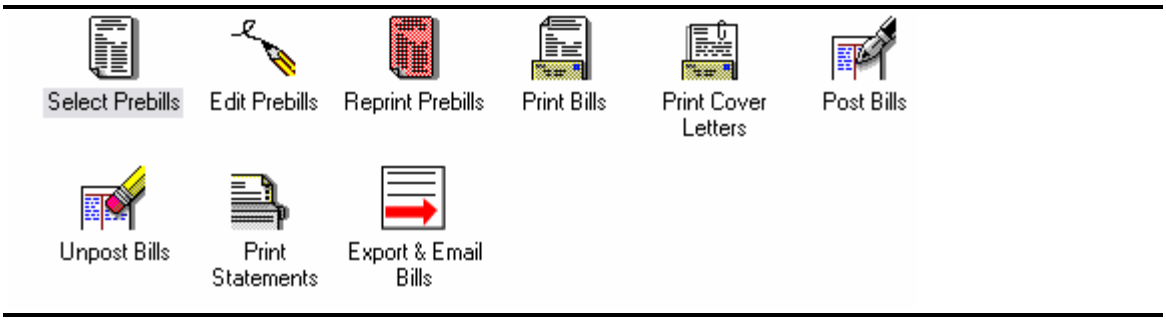


7. When prompted with the date, accept the default and click "Continue."



8. Select Form → Close to close the Void Checks form.

BILLING


Select Prebills
Edit Prebills
Reprint Prebills
Print Bills
Print Cover Letters
Post Bills
Unpost Bills
Print Statements
Export & Email Bills

Introduction

The Billing section of Juris contains all of the functions for generating, editing and finalizing client bills. Juris allows bills to be printed or sent to a file on the hard drive. Cover letters and statements may also be created.

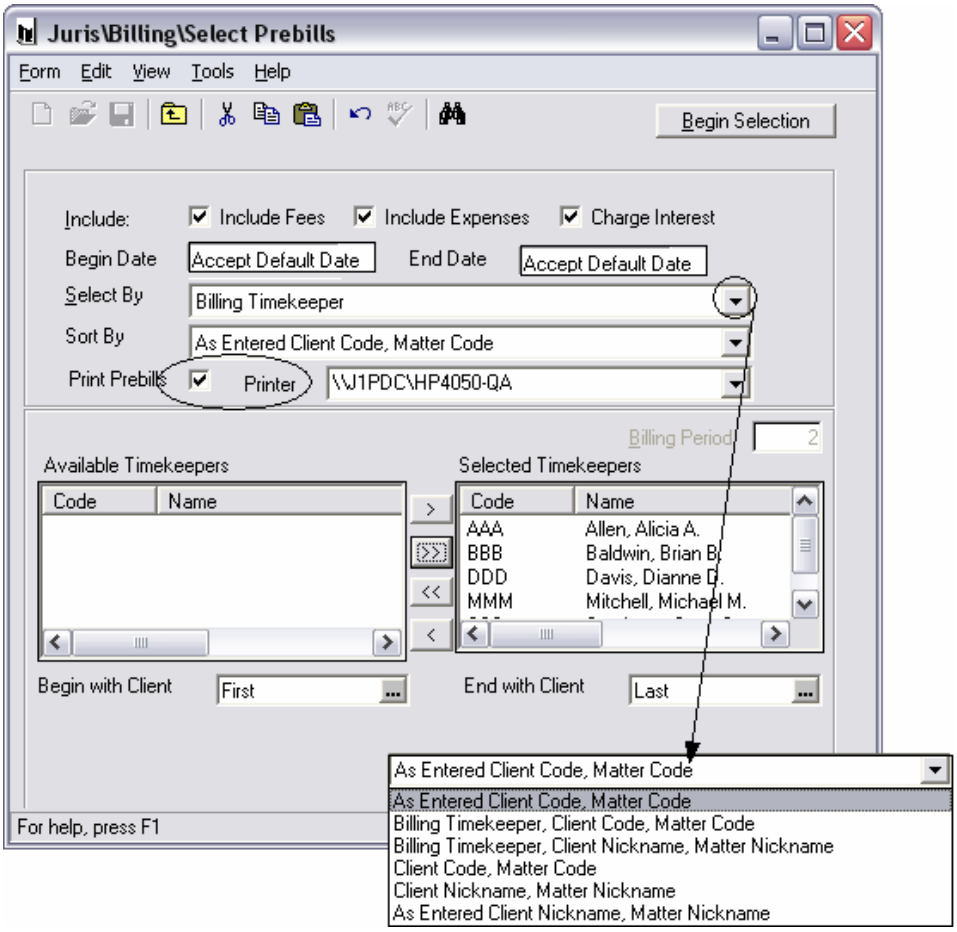
The billing area is feature-rich and allows many options to allow each firm to process invoices easily and efficiently.

Select Prebills

Select Prebills will select all posted transactions applicable to the selection range entered by the user.

Exercise:

1. Select Billing → Select Prebills
2. Review the *Select Prebills* form. Make selections as shown below:



3. Click Begin Selection.
4. Select *Form* → *Close* after prebills have printed.

Edit Prebills

Edit Prebills is the area where the data on the prebill may be modified based on the attorney's needs. A Prebill's Status may be viewed at any time on the Prebill List Form which is displayed when first selecting Edit Prebills.

BILLING STATUS
Once a Prebill is printed, a certain Status is assigned as each billing step is finished. While some flexibility is allowed, generally a Status will be used to expedite the billing process. These Statuses are: Ready to Edit, Ready to Print Bill, Ready to Print Revised Prebill, and Ready to Post.

READY TO EDIT
After the selection and printing of Prebills using the Select Prebills option, the status of Prebills is set to 'Ready To Edit'.

READY TO PRINT BILL
After editing the Prebills in Edit Prebills (minimally assigning an Action Code to release the Prebill for billing), the status of Prebills is set to 'Ready To Print Bill'.

READY TO PRINT REVISED PREBILL
In Edit Prebills, the user may override the 'Ready To Print Bill' status by changing the Print Option of the Prebill to 'Print Revised Prebill'. If selected, the status of the Prebill is set to 'Ready To Print Revised Prebill'.

READY TO POST
After printing bills in Print Bills, Prebill Status is set to 'Ready To Post'.

ACTION CODES:
The action codes determine the type of detail that should be generated for the bill. Action codes may be assigned in edit prebill – but they may also be pre-determined at the matter level by using Quick Action codes. The Action Codes are None, Full, Exp Only, Sum Bill, Sum + Exp.

NONE
No Action yet selected.

FULL
Full Detail. A 'Full' Action indicated that the firm wishes to print a bill in the fullest detail possible based on reporting fields available through the specific prebill design.

EXP ONLY
Expense Only. An 'Exp Only' Action indicates that only expenses are to be billed.

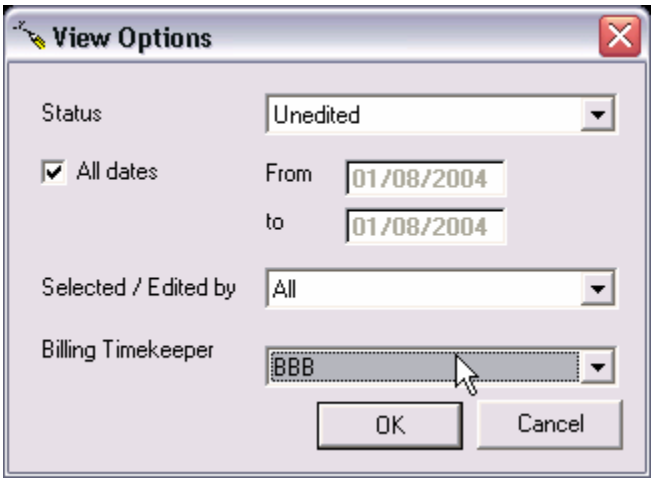
SUMM BILL
Summary Bill. A 'Sum Bill' Action bills all items, but suppresses the detail of those items and allows the user to enter summary text to replace the suppressed detail.

SUM + EXP
A 'Sum + Exp' Action allows summary text replacement for fee detail, but shows the detail of expenses billed.

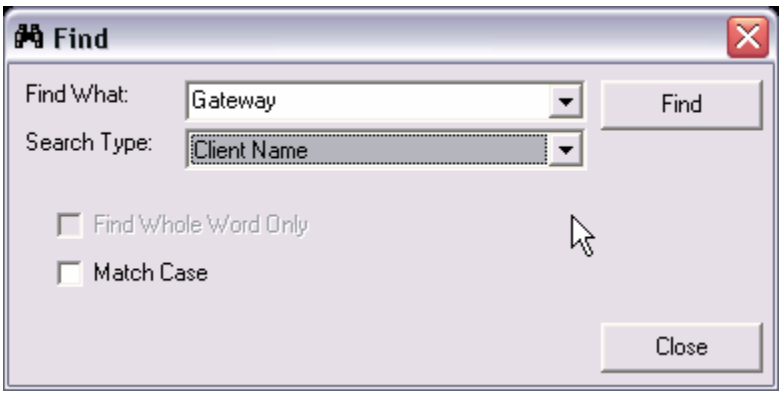
Prebill List View

Exercise:

1. Select Billing → Edit Prebills
2. Select *View* → *All Prebills*.
3. Select View → Filter and choose the following filter options:



4. Select *Tools* → *Find* and search for “Gateway” in Client Name as shown below:

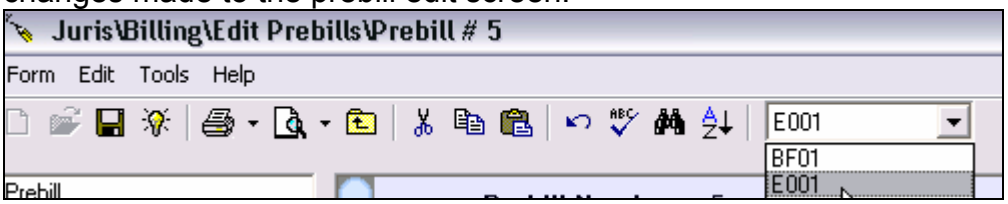


5. Click *Form* → *Close* when finished reviewing options.

Prebill Detail View

Exercise:

1. Select Billing → Edit Prebills and right-click on the prebill for Client 0100 Matter 1 to open the prebill detail for editing purposes.
2. Review the prebill detail as shown. Hover over items on the screen with the mouse. When hovering over a data field with the mouse, a label identifying that field will appear.
3. Click the Bill Format drop-down box. Choose the E001 format. Review the changes made to the prebill edit screen.

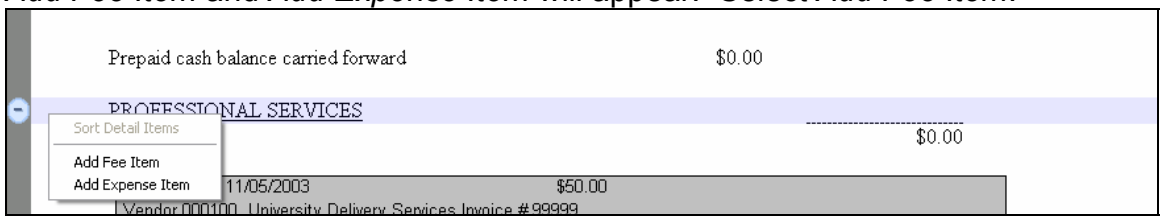


4. Click *Form* → *Close*.

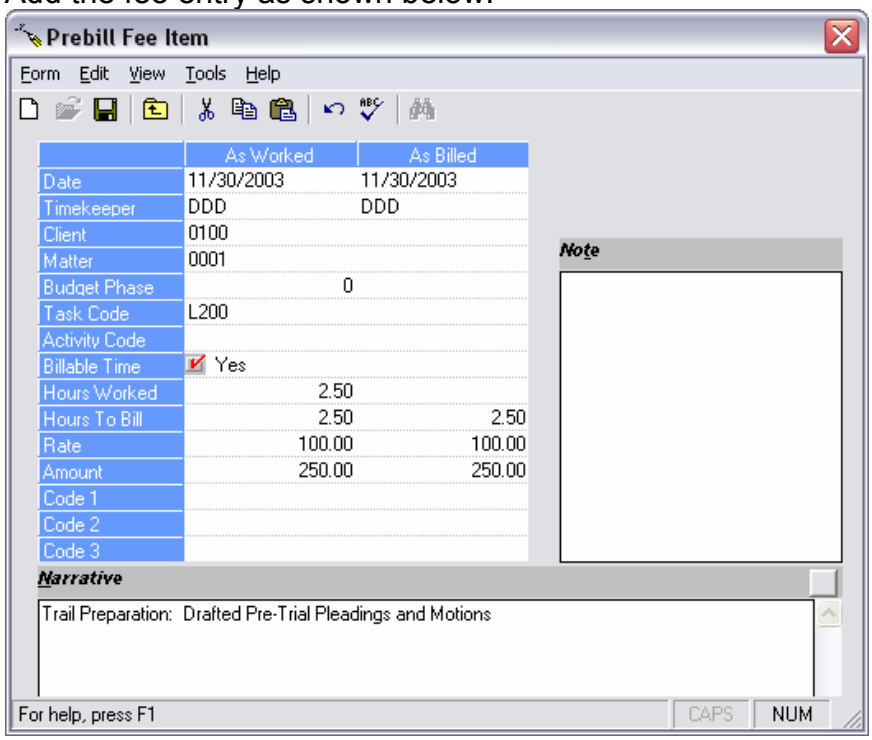
Add Items

Exercise:

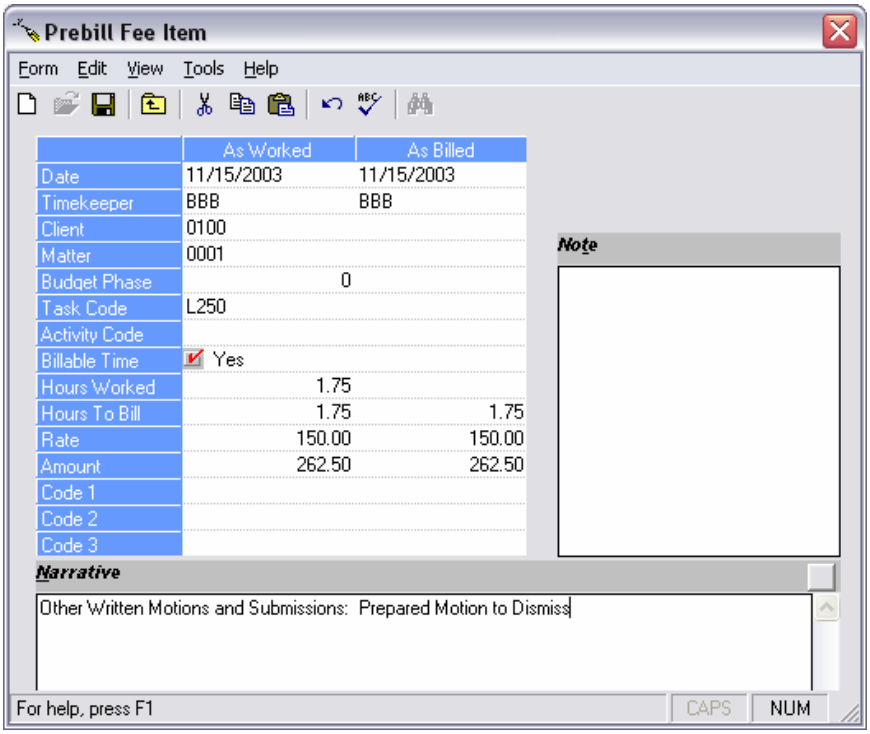
1. Select Billing → Edit Prebills and right-click on the prebill for Client 0100 Matter 1 to open the prebill detail for editing purposes.
2. Use the mouse to hover the cursor over the "Professional Services" line until it turns light blue as shown below, then right click on that row. The options *Add Fee Item* and *Add Expense Item* will appear. Select *Add Fee Item*.



3. Add the fee entry as shown below:



4. Click the New button and enter a second fee item as shown below:



5. Save and close the form. Review the prebill and the new items that have been added.

Basic Type-Over Editing

Exercise:

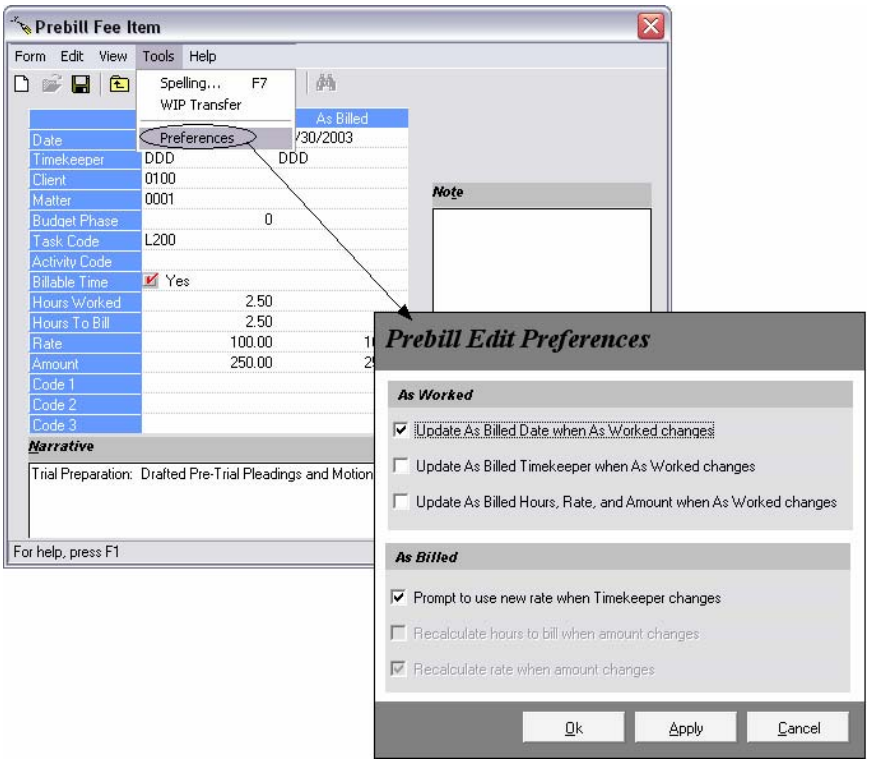
1. Select Billing → Edit Prebills and right-click on the prebill for Client 0100 Matter 1 to open the prebill detail for editing purposes.
2. Click inside the narrative of a time entry.
3. Type in your name.
4. Press the tab button or click on another field.
5. Make additional changes as stipulated by your instructor.
6. When finished making type-over edits, click *Form* → *Close*.

Drill Down Editing

Exercise:

1. Select Billing → Edit Prebills and right-click on the prebill for Client 0100 Matter 1 to open the prebill detail for editing purposes.
2. Right-click on a fee item and select *Edit* from the drop-down menu.
3. Review the detail of the time entry.
4. Select *Tools* → *Preferences* as shown below. Review the preferences. Make your selection and click OK.

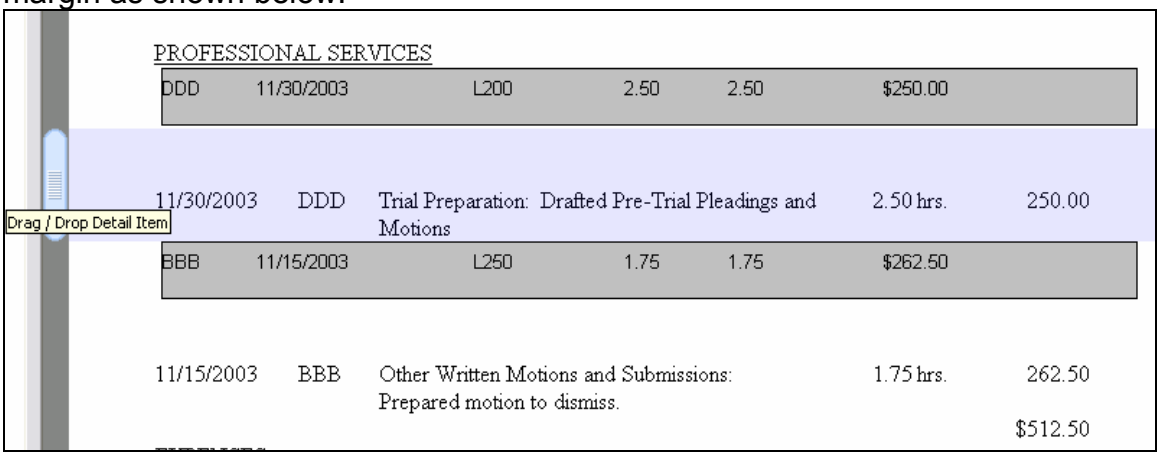
5. Click *Form* → *Close* when finished.



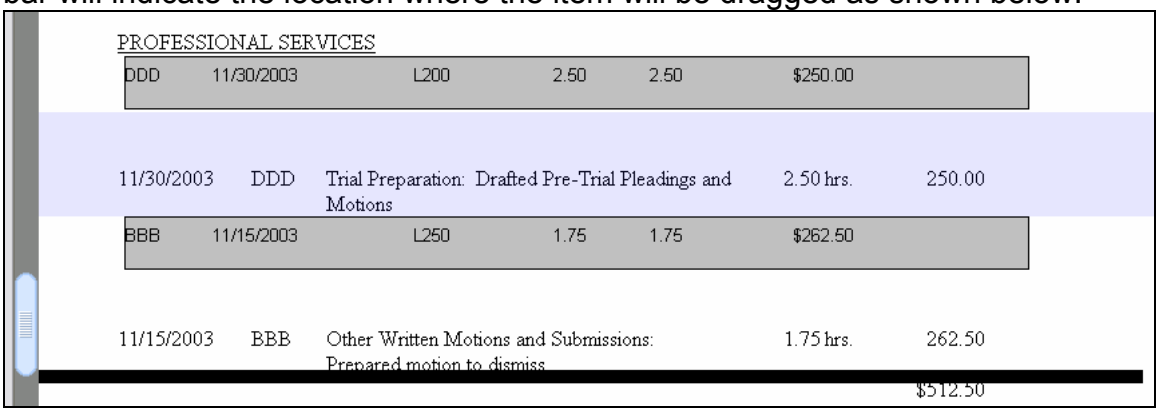
Drag and Drop Items

Exercise:

1. Select Billing → Edit Prebills and right-click on the prebill for Client 0100 Matter 1 to open the prebill detail for editing purposes.
2. Scroll to the Fee Detail and hover in the left margin of the fee dated 11/30/2003 until the item is highlighted in blue with a blue dot in the left margin as shown below.



3. Click on the blue dot and drag the item to the bottom of the fees list. A black bar will indicate the location where the item will be dragged as shown below:



4. Save and close the prebill.

Find/Replace/Spell Check

Exercise:

1. Select Billing → Edit Prebills and right-click on the prebill for Client 0100 Matter 1 to open the prebill detail for editing purposes.
2. Select *Edit* → *Find* and search for the word "Meals." Click *Close* when finished.

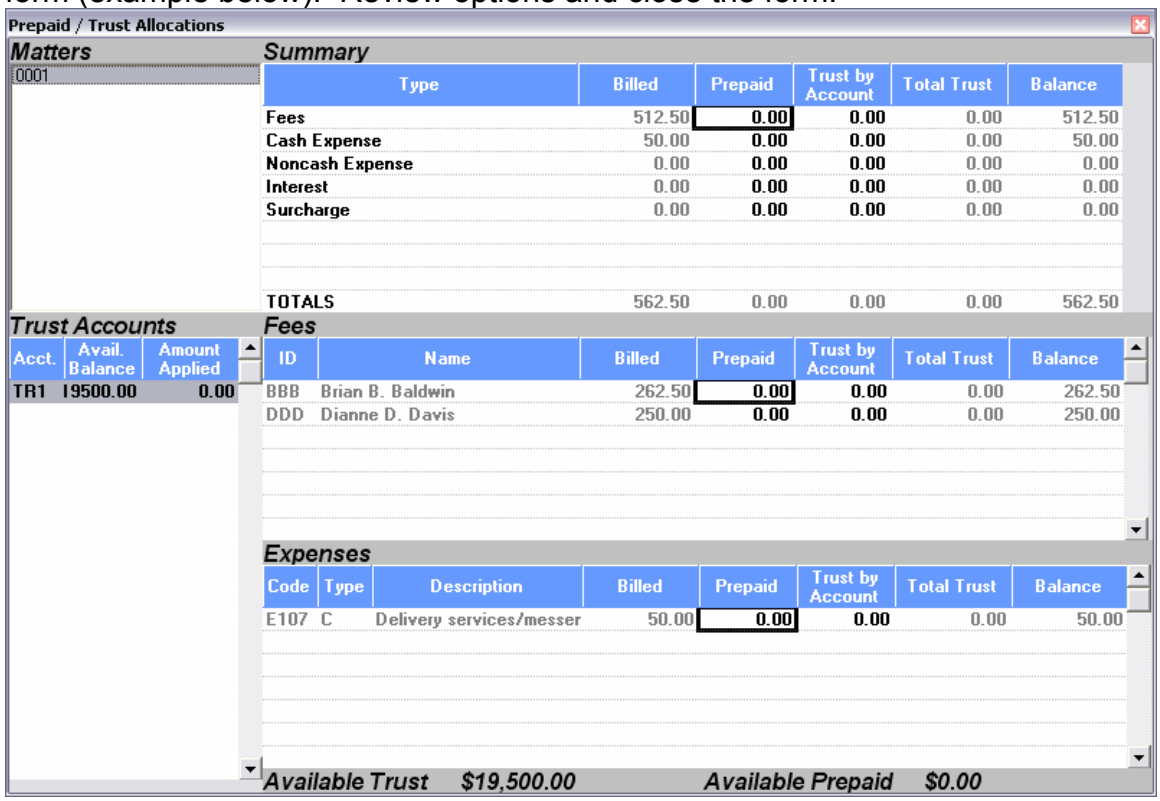
3. Select *Edit* → *Replace*. Find the phrase "Delivery services/messengers" and replace with "messenger service." Click *Replace All*. When finished click *Close*.

4. Click *Edit* → *Spell Check*. When complete click *OK*.
5. Click *Form* → *Close* when finished.

Tools Menu Options

Exercise:

1. Select Billing → Edit Prebills and right-click on the prebill for Client 0100 Matter 1 to open the prebill detail for editing purposes.
2. Select Tools → Prepaid/Trust Allocation and review the options shown on the form (example below). Review options and close the form.



Prepaid / Trust Allocations

Matters: 0001

Summary

Type	Billed	Prepaid	Trust by Account	Total Trust	Balance
Fees	512.50	0.00	0.00	0.00	512.50
Cash Expense	50.00	0.00	0.00	0.00	50.00
Noncash Expense	0.00	0.00	0.00	0.00	0.00
Interest	0.00	0.00	0.00	0.00	0.00
Surcharge	0.00	0.00	0.00	0.00	0.00
TOTALS	562.50	0.00	0.00	0.00	562.50

Trust Accounts

Acct.	Avail. Balance	Amount Applied
TR1	19500.00	0.00

Fees

ID	Name	Billed	Prepaid	Trust by Account	Total Trust	Balance
BBB	Brian B. Baldwin	262.50	0.00	0.00	0.00	262.50
DDD	Dianne D. Davis	250.00	0.00	0.00	0.00	250.00

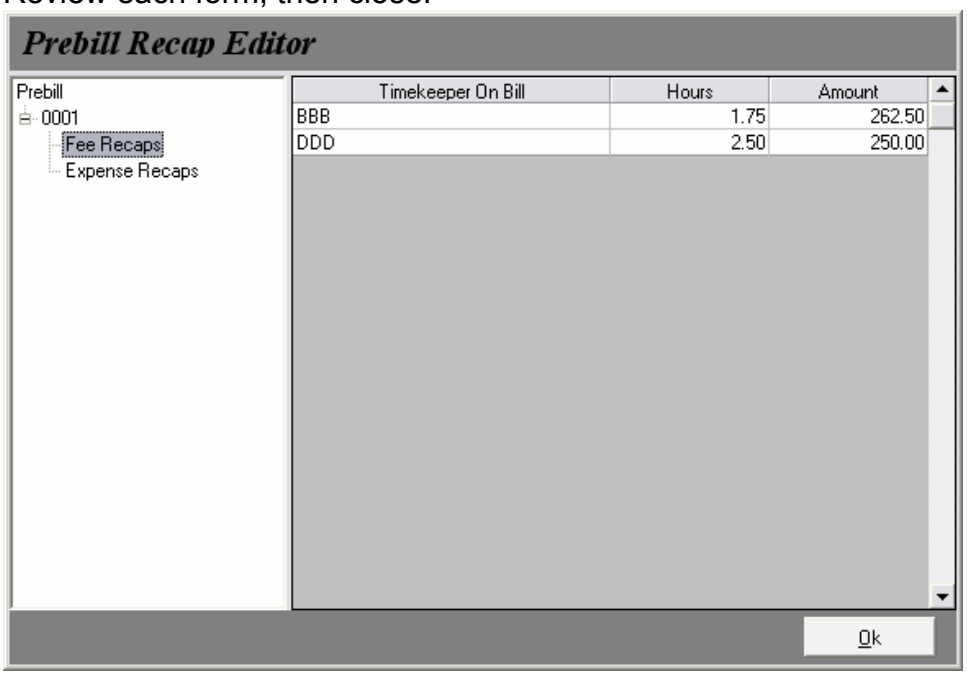
Expenses

Code	Type	Description	Billed	Prepaid	Trust by Account	Total Trust	Balance
E107	C	Delivery services/messer	50.00	0.00	0.00	0.00	50.00

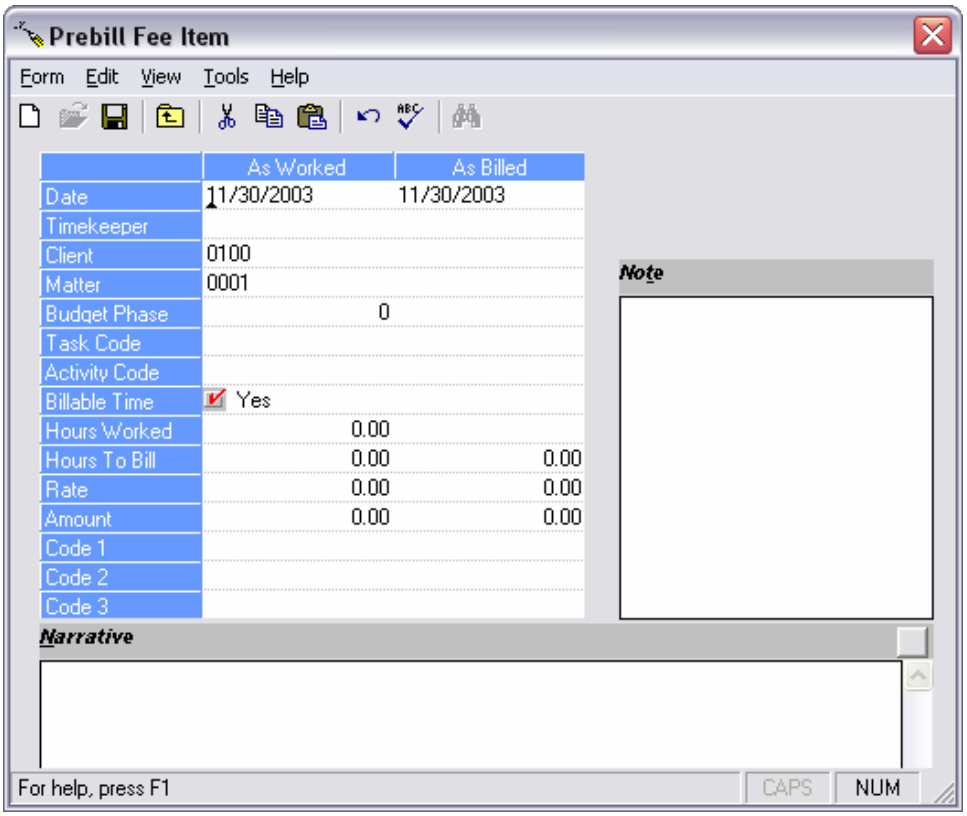
Available Trust $19,500.00 Available Prepaid $0.00

[Applying Prepaid funds will be discussed later in this chapter.]

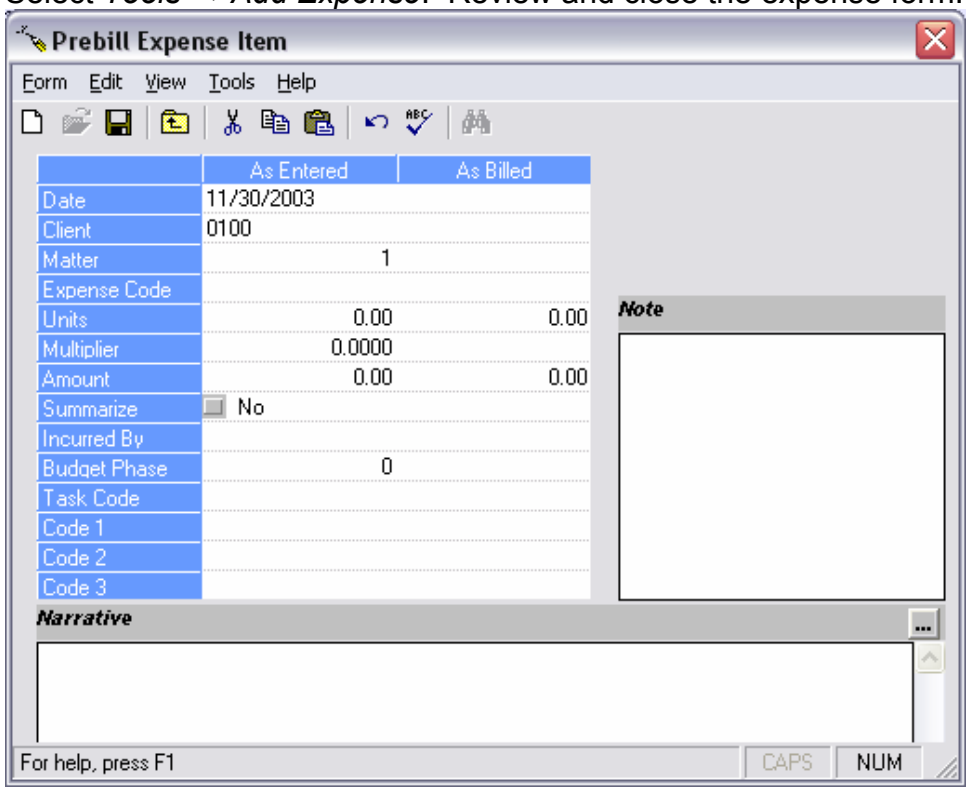
3. Select *Tools* → *Recap Editor*. Select Fee Recaps, then Expense Recaps. Review each form, then close.



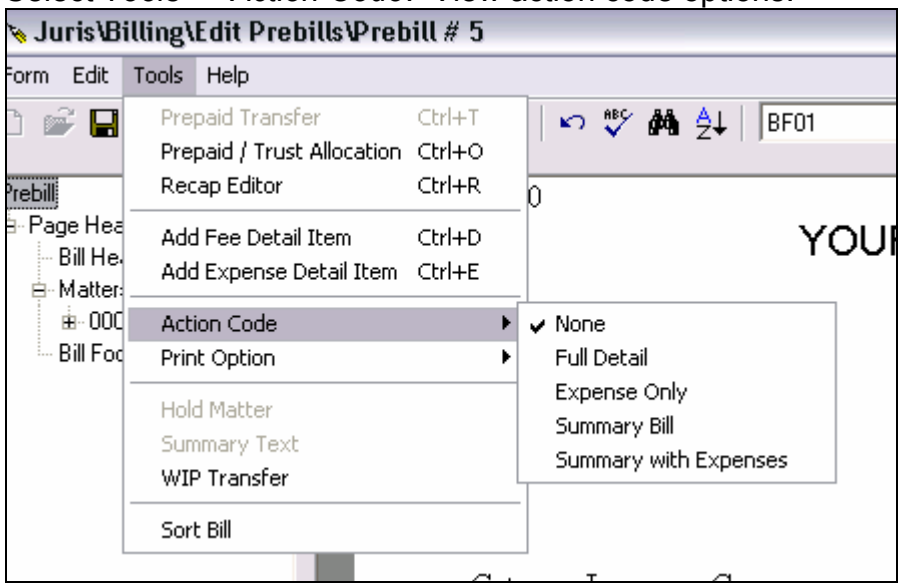
4. Select *Tools* → *Add Fee*. Review and close the fee form.



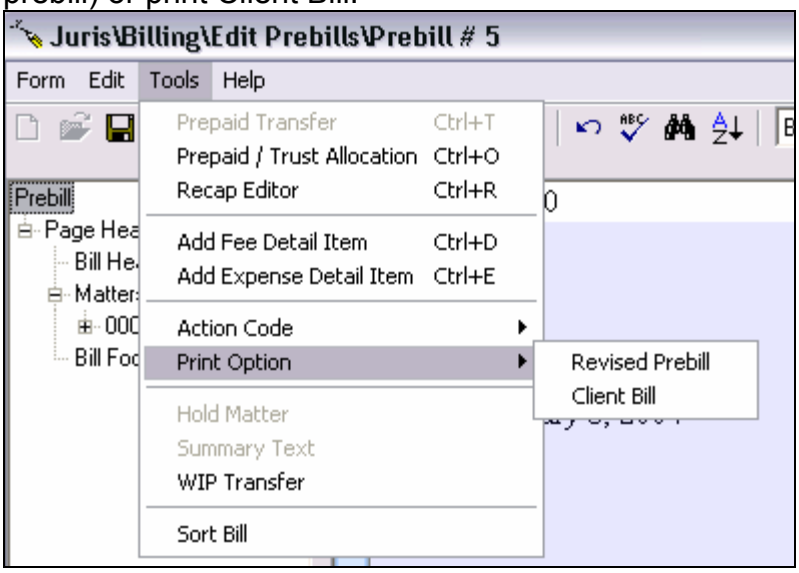
5. Select *Tools* → *Add Expense*. Review and close the expense form.



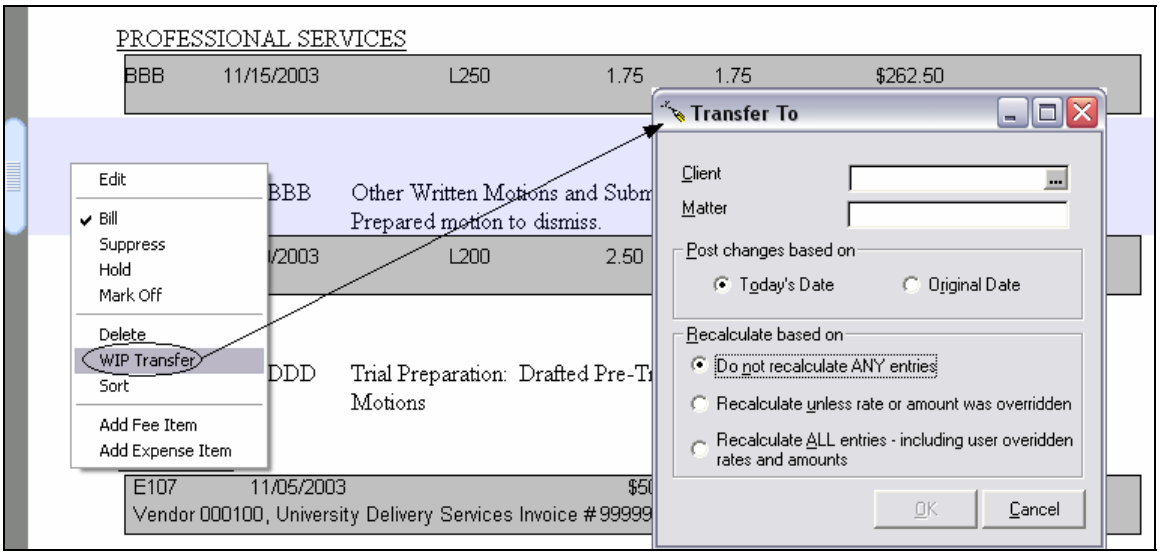
6. Select *Tools* → *Action Code*. View action code options.



7. Select *Tools → Print Option*. Review option to print revised prebill (reprint prebill) or print Client Bill.



8. Highlight a fee or expense item and select *Tools → WIP Transfer*. Review form and click Cancel.



9. Select *Tools → Sort Bill*. Review bill and notice that items dragged and dropped have been resorted in order as determined by the bill format.

RECALCULATION METHODS:

Do not recalculate ANY entries – This option transfers the entries intact without any recalculation.

Recalculate unless rate or amount was overridden – This option recalculates the entries upon transfer based upon the Fee/Expense Schedule of the Matter to

which the entries are being transferred. Entries whose Rates and Amounts were manually overridden are not recalculated.

Recalculate ALL entries – including overridden rates and amounts – This option recalculates the entries upon transfer based upon the Fee/Expense Schedule of the Matter to which the entries are being transferred, including those entries whose Rates and Amounts were manually overridden.

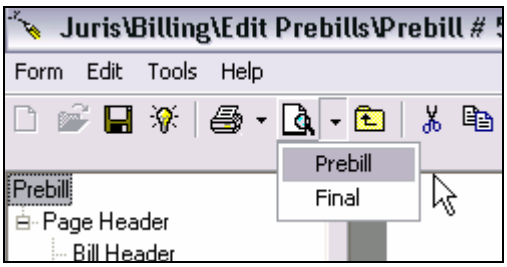
Bill, Hold, Suppress, Mark Off

1. Select Billing → Edit Prebills and right-click on the prebill for Client 0100 Matter 1 to open the prebill detail for editing purposes.
2. Highlight a fee or expense item by clicking in the left margin of that item. Once highlighted, right click on the item. View the options to Bill, Hold, Suppress or Mark Off.
3. Highlight multiple fee items or multiple expense items by clicking in the left margin of the first item, then hold down the control key while clicking in the left margin of the subsequent items. Once all items are selected, they may be set to Bill, Hold, Suppress or Mark Off simultaneously by clicking the appropriate selection on the right-click menu.

Preview or Print Prebill/Final Bill

Exercise:

1. Select Billing → Edit Prebills and right-click on the prebill for Client 0100 Matter 1 to open the prebill detail for editing purposes.
2. Click the drop down arrow to the right of the Print Preview icon on the Button Bar as shown below to reveal the Prebill and Final options.



3. Review the print preview of the prebill (select to save changes if prompted). Then review the print preview of the final bill.
4. When finished reviewing close the bills. Then click *Form → Close*.

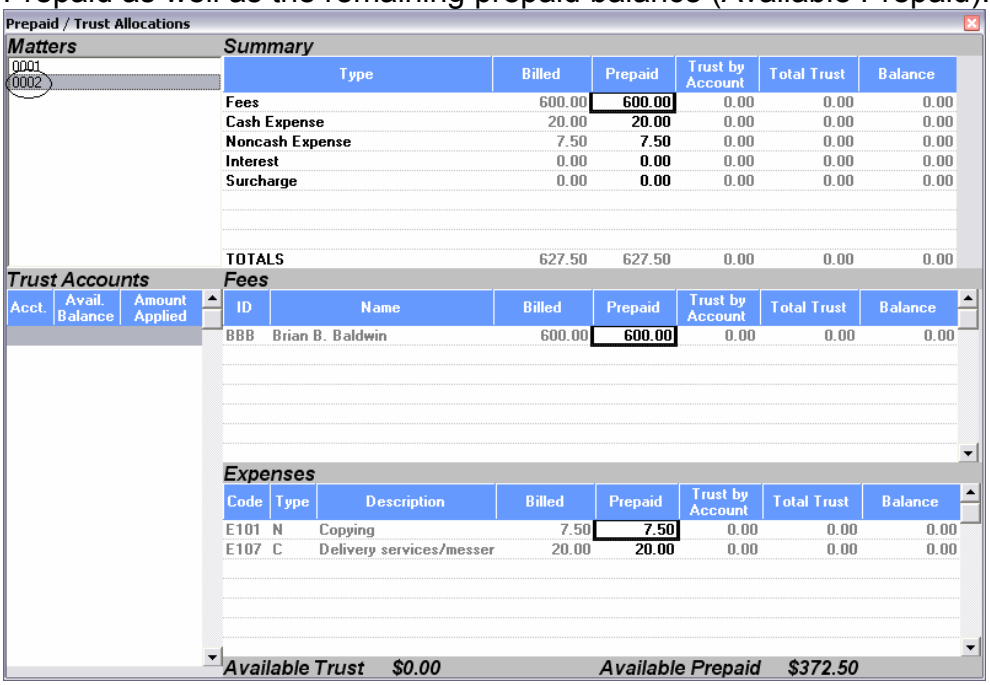
Apply/Transfer Prepaid

This example specifically describes applying Prepaid funds, but Trust may be applied in the same manner. The only difference is that Prepaid funds will be automatically applied by the system when those funds are available – and trust

funds must always be applied manually to maintain control of the trust account(s). Prepaid funds may also be transferred from one matter in a consolidation to another. Trust funds may NOT be transferred in this way. Transfer of trust funds from one account to another must be done through Trust Adjustment in Transactions. Again, trust must be handled differently in order to maintain control of the trust account(s).

Exercise:

1. Select Billing → Edit Prebills and right-click on the prebill for Client 0200 to open the consolidated prebill detail for editing purposes.
2. Select *Tools → Trust/Prepaid Allocation* to open the form as shown below. Select Matter 0002 of the consolidation and review the automatic allocation of Prepaid as well as the remaining prepaid balance (Available Prepaid).



3. Close the Prepaid/Trust Allocation form and select *Tools → Prepaid Transfer*. Transfer the remaining prepaid from Matter 0002 to Matter 0001 by

subtracting it from Matter 0002 and adding to Matter 0001 as shown below:

Prepaid Transfer

Matter Code	Prepaid Balance	Prepaid Transfer Amount	Total Charges Before Prepaid	Prepaid Applied	Remaining Charges On Bill
0001	0.00	372.50	428.00	0.00	428.00
0002	372.50	-372.50	627.50	627.50	0.00

Transfer

4. Re-open the Prepaid/Trust Allocation form by selecting Tools → Trust/Prepaid. Review Matter 0001 and Matter 0002. Note that Matter 1 now has prepaid applied and Matter 0002 has $0 available prepaid.

Prepaid / Trust Allocations

Matters

0001
0002

Summary

Type	Billed	Prepaid	Trust by Account	Total Trust	Balance
Fees	375.00	319.50	0.00	0.00	55.50
Cash Expense	50.00	50.00	0.00	0.00	0.00
Noncash Expense	3.00	3.00	0.00	0.00	0.00
Interest	0.00	0.00	0.00	0.00	0.00
Surcharge	0.00	0.00	0.00	0.00	0.00
TOTALS	428.00	372.50	0.00	0.00	55.50

Trust Accounts

Acct.	Avail. Balance	Amount Applied

Fees

ID	Name	Billed	Prepaid	Trust by Account	Total Trust	Balance
BBB	Brian B. Baldwin	375.00	319.50	0.00	0.00	55.50

Expenses

Code	Type	Description	Billed	Prepaid	Trust by Account	Total Trust	Balance
E101	N	Copying	3.00	3.00	0.00	0.00	0.00
E107	C	Delivery services/messer	50.00	50.00	0.00	0.00	0.00

Available Trust $0.00 *Available Prepaid* $0.00

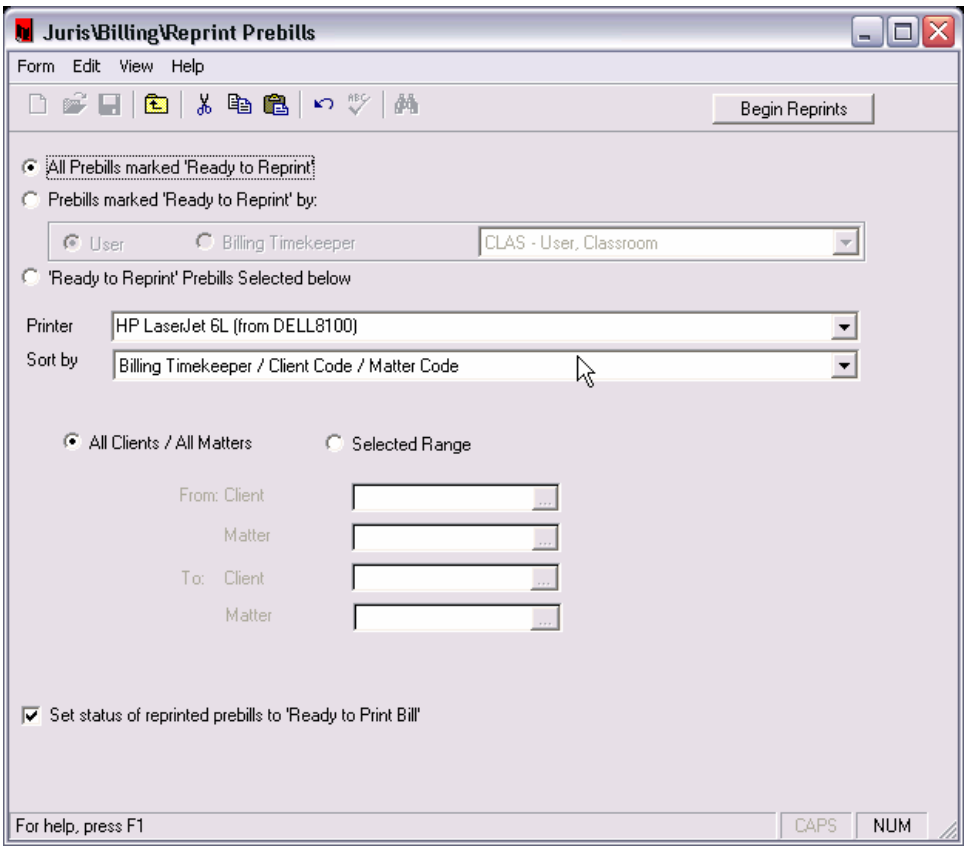
5. Save the changes and close the prebill.

Reprint Prebills

Reprint Prebills allows prebills to be printed again, in case a second copy is needed or there was a printer problem when prebills were generated. When selecting to Reprint Prebills, the system will allow selection of All Prebills, Prebills for a specific User, or a specific Prebill Number with the applicable Status. The latter option provides an override to the Status setting and allows a Reprint Prebill or Print Bill to be generated even though the applicable Reprint/Print Status has not been set.

Exercise:

1. Select Billing → Reprint Prebills
2. Review the *Reprint Bills* selection form.
3. Select *Form* → *Closed* when finished with review.



Print Bills

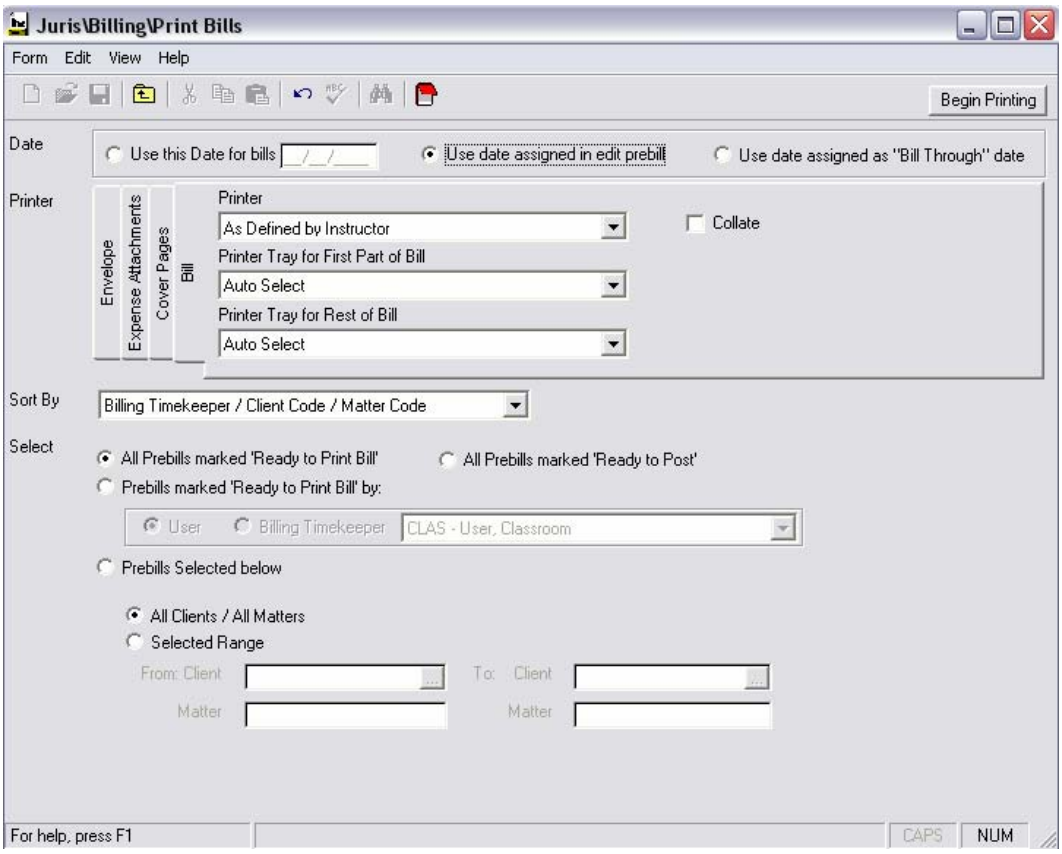
When selecting to *Print Bills*, the system will allow selection of All Prebills, Prebills for a specific User, or a specific Prebill Number with the applicable Status. The latter option provides an override to the Status setting and allows a Reprint Prebill or Print Bill to be generated even though the applicable Reprint/Print Status has not been set.

Bills may be selected to print using the various criteria available on the form. The form allows users to select bills based on their status in edit prebills as well as by who assigned that status. The selection can be further isolated to a particular client/matter range.

Exercise:

1. Select Billing → Print Bills

2. Review the *Print Bills* selection form for available options. Select the following options:



3. Click the *Begin Printing* button.
4. Select *Form* → *Close* when printing is finished.

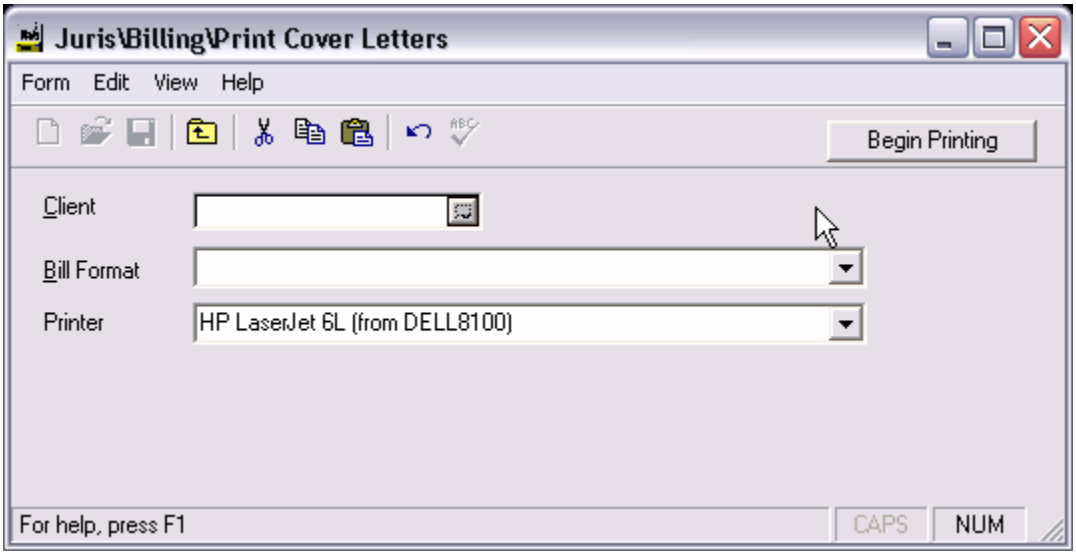
Print Cover Letter

This option is provided to allow Cover Letters to be printed for selected Clients with *unconsolidated* Matter bills. The Cover Letter provides a summary for these unconsolidated bills. The unconsolidated Matter's bills must first be printed and the status set 'Ready To Post'. This option requests the selection of a Bill Format. This Bill Format must contain a Cover Page as part of its design.

This option would not be used to produce a Cover Letter for *one Single-Matter* Bill or for *consolidated* Matter Bills. Their Cover Letters would simply be produced by assigning a Bill Format to the Matters or Consolidation which contain a Cover Page as part of its design.

Exercise:

1. Select Billing → Print Cover Letters
2. Review the Print Cover Letter form including the lookup and drop-down menus. (Please note that only bill layouts with Cover Letters designed will appear on the Bill Format drop-down menu.)
3. Select *Form* → *Close* when finished with review.



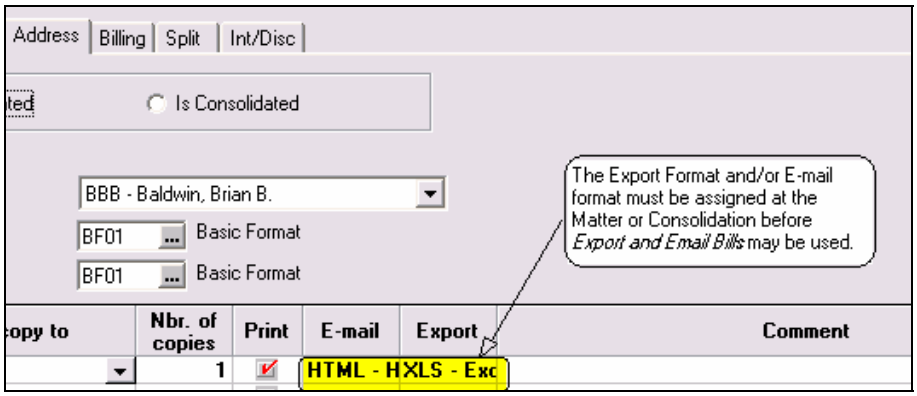
Note: The *Print Cover Letters* function is intended to print one cover letter containing multiple single matter bills for the same client. Individual single matter bills and consolidations may be printed with a cover letter during *Print Bills*. Only matters with a status of "Ready to Post" will be included.

Export & Email Bills

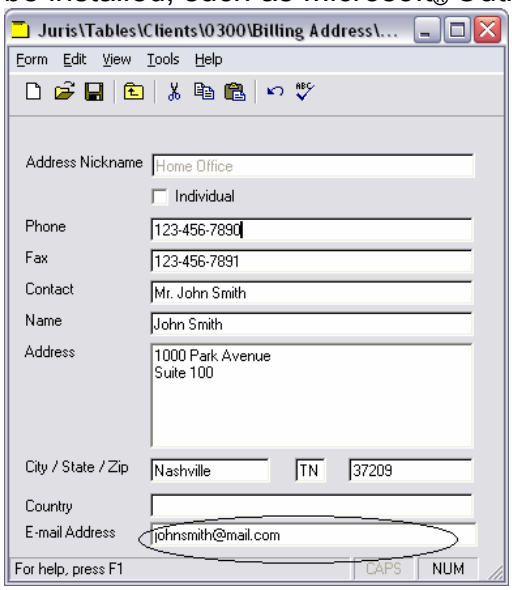
The *Export and E-mail Bills* function may be used to Export bills to file or E-mail multiple bills at one time according to the bill's status. The bill must have a status of "Ready to Print Bill" or "Ready to Post" before it may be selected for E-mail or Export.

In order to use this function, the Matter or Consolidation must have the following optional criteria entered:

- To use the Export and/or E-mail function, there must be an Export format and/or E-mail format defined at the Matter level or on the Consolidation as shown below:

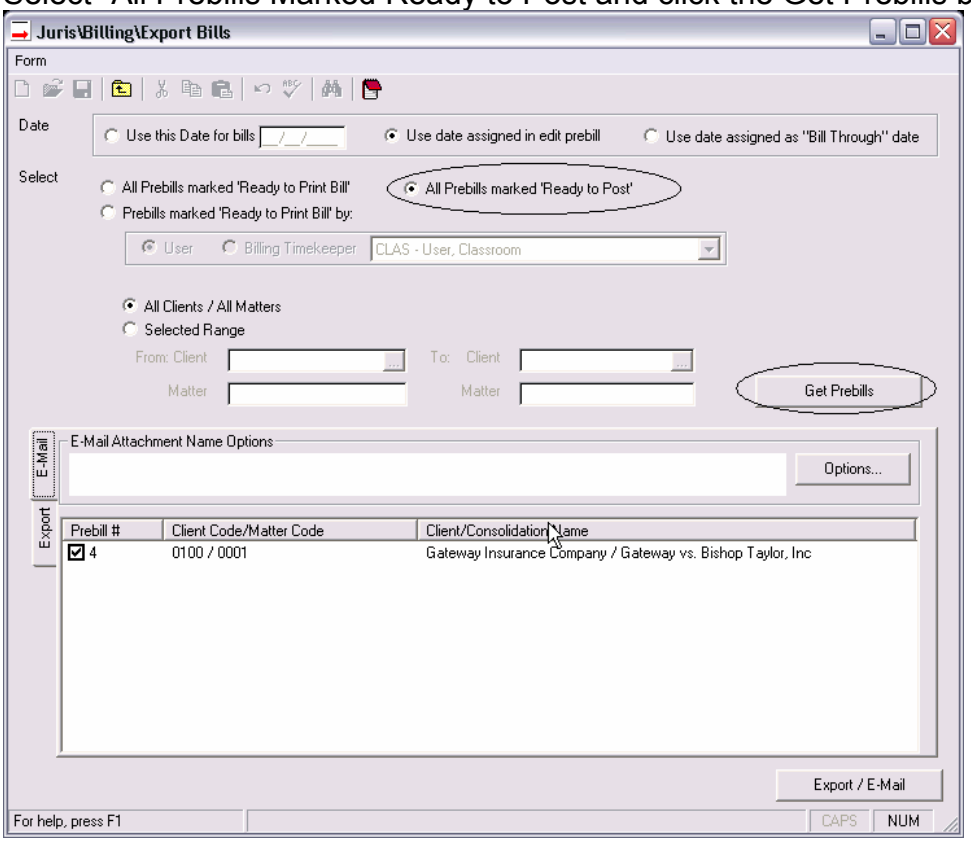


- To use the E-mail function, the 'Send Copy To" address must also have an e-mail address defined. (NOTE: MAPI-compliant e-mail software must be installed, such as Microsoft® Outlook®)



Exercise:

1. Select Billing → Export & Email Bills
2. Select "All Prebills Marked Ready to Post and click the Get Prebills button.



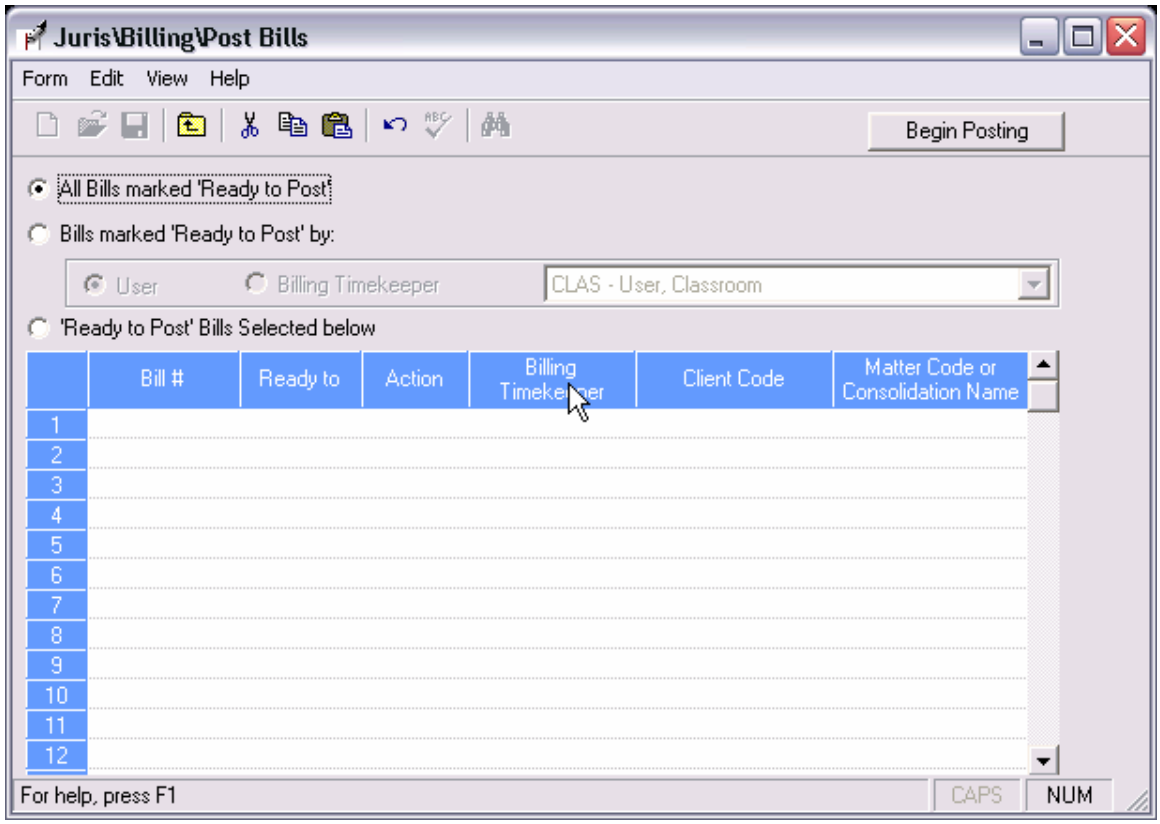
3. Review the items on the E-mail tab. Click the Options button and define a filename format for the E-mail. Uncheck the prebill listed on the E-mail tab to remove it from the bills selected to e-mail.
4. Review the items on the Export tab. Click the Options button and define an Output path and Filename format for the Export file.
5. Click the *Export/Email* button.

Post Bills

Posting Bills finalizes the billing process. When selecting to *Post Bills*, the system will allow selection for All Bills, Bills for a specific User, or a specific Bill Number with the applicable Status. The latter option provides an override to the Status setting and allows a Bill to be posted even though the applicable Post Status has not been set.

Exercise:

1. Select Billing → Post Bills
2. Review the *Post Bills* selection form for available options.
3. Select "All Bills Ready to Post"
4. Click "Begin Posting"
5. Select *Form* → *Closed* when finished.

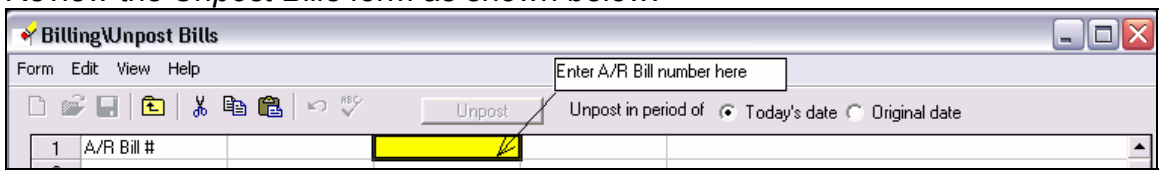


Unpost Bills

Unpost Bills allows a posted bill to be Unposted so that changes can be made or the bill deleted. A bill may not be unposted if Cash Receipts or Credit Memos have been applied to the bill. Unposting returns Time and Expense entries to the Unbilled Time/Expense Tables.

Exercise:

1. Select Billing → Unpost Bills
2. Review the *Unpost Bills* form as shown below.



3. Select *Form* → *Close* when finished with review.

NOTE: If Unposting is desired the following steps must be taken:

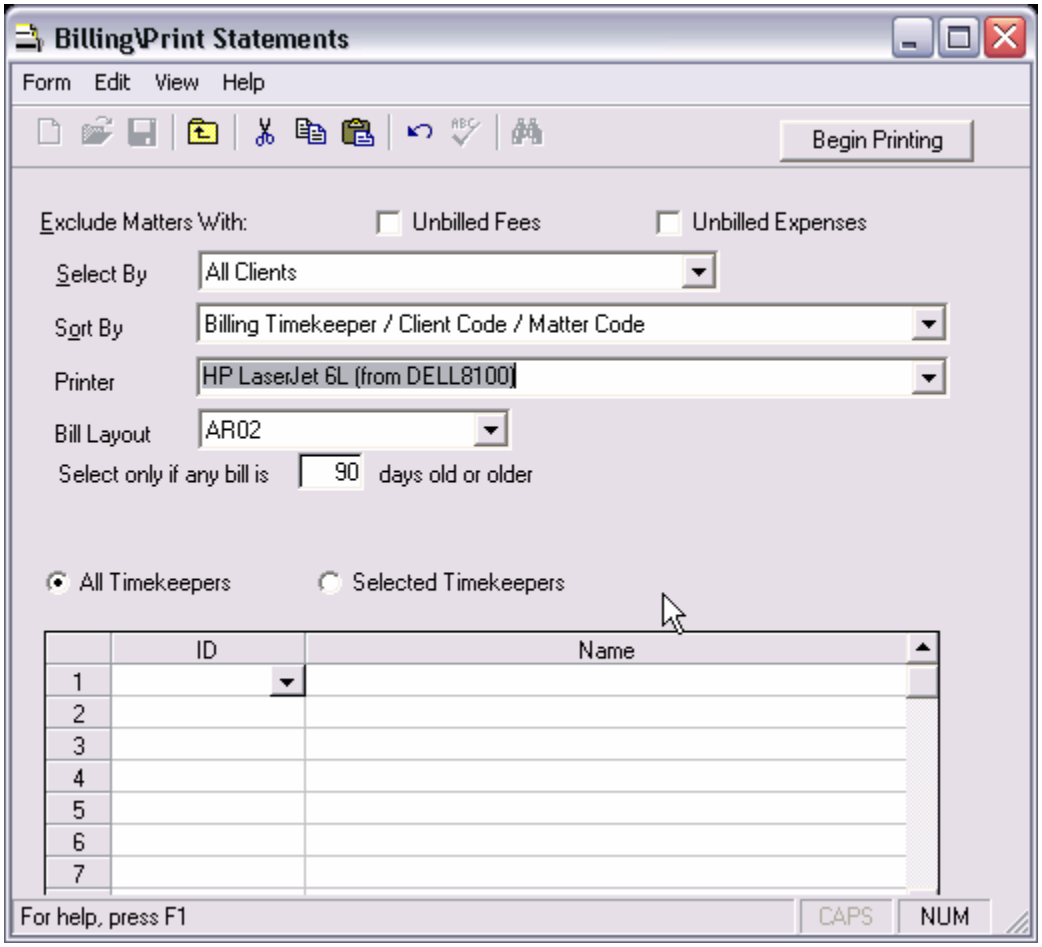
- Enter the valid A/R Bill Number into the *Unpost Bills* spreadsheet where indicated in the screen shown above. The system will show the details of that bill.
- Choose whether to Unpost in the period of Today's Date or Original Date.
- Select the Unpost button. Since posting may not be undone once performed except by rebilling, the system will prompt for confirmation before unposting the bill.
- The system will prevent bills from being Unposted if funds are applied to the bill. Posted cash receipts or adjustments must be reversed before a bill can be Unposted.

Print Statements

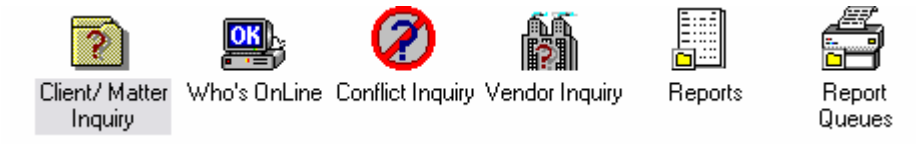
This option is provided to Print A/R reminder statements. A Bill Format with an AR Statement as part of its design is required. Selection is allowed using Aging Date criteria and the firm may select to not include Matters which have current unbilled fees/expenses.

Exercise:

1. Select Billing → Print Statements.
2. Review the Statements setup form as shown below. Click the drop-down boxes and review the AR Statement options. (Please note that only bill layouts with AR Statements designed will appear on the Bill Layout selection box.)
3. Select *Form* → *Close* when finished with the review.



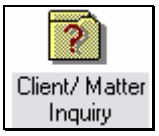
INQUIRY - REPORTS



Introduction

This section provides exercises for Inquiry and Reports. The Inquiry/Reports folder provides options for *Client/Matter Inquiry*, *Conflict Inquiry*, *Vendor Inquiry* and *Who's OnLine*.

Report Queues are provided to print a group of 'stacked' reports and Financial Statements such as a set of Period End reports to be printed at the end of each accounting period. Additionally, *Report Queues* allow purging functions to be added to a Report Queue. This helps expedite the purging of Transaction batches that are of a certain age (i.e., zero (i.e., 0) months or older).

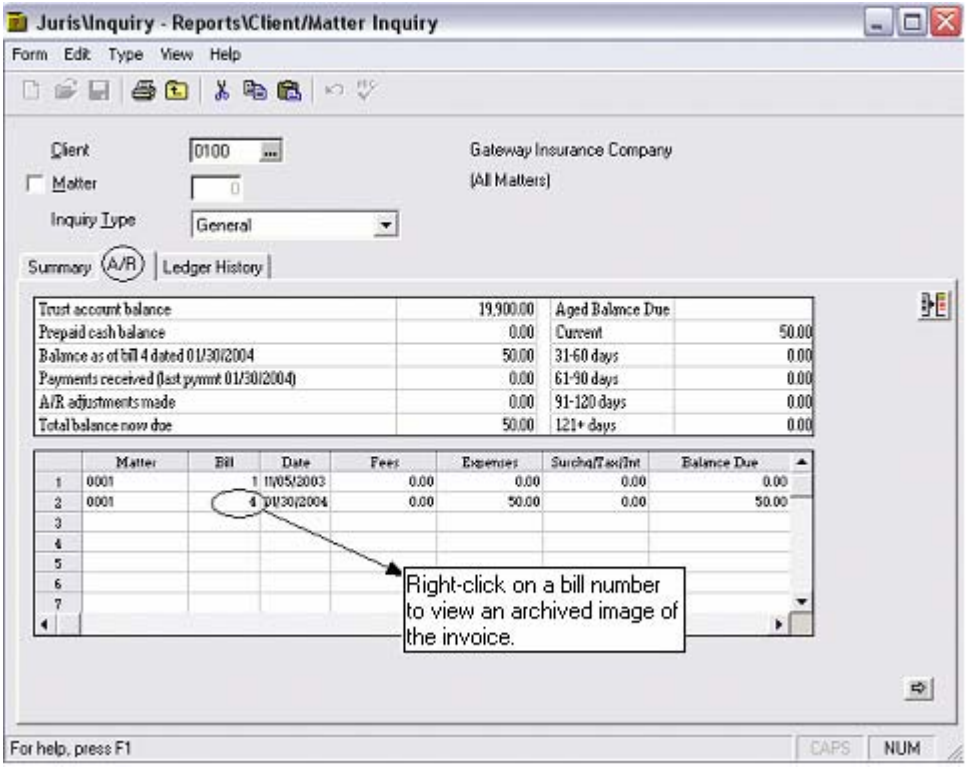


Client/Matter Inquiry

Client/Matter Inquiry allows a user to review detail regarding a client or a particular matter.

Exercise:

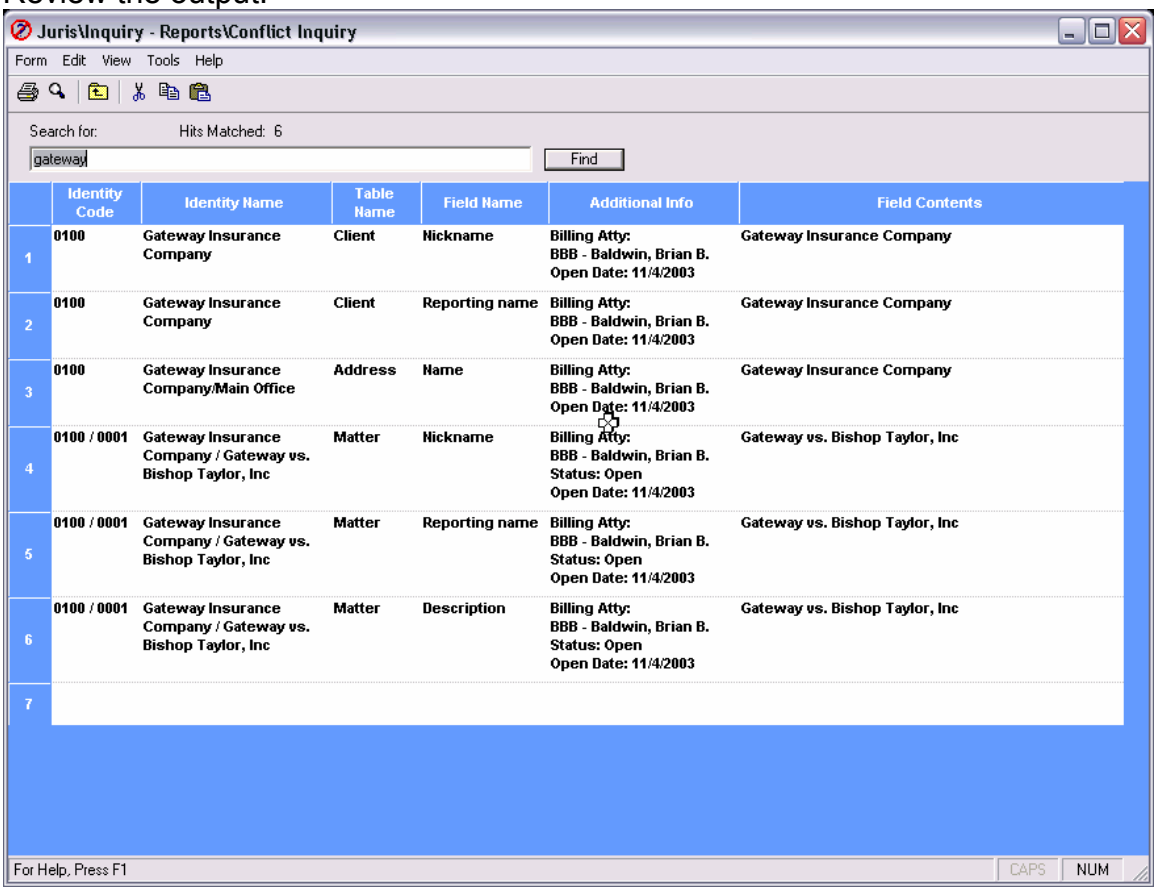
1. Select Inquiry - Reports → Client/ Matter Inquiry
2. Enter client 0100/Gateway Insurance Company for Inquiry.
3. Skip the Matter selection option and select the General Inquiry from the Inquiry Type drop-down box. This will reveal detail for all matters for client 0100.
4. Click and review each of the other Inquiry types (Fees, Expenses, Bills, Receipts, Client Info and Trust.)
5. Place a checkmark in the Matter box and enter Matter 1/Gateway vs. Bishop Taylor, Inc. Review each of the Inquiry types again. Select Form → Close when finished.



Conflict Inquiry

Exercise:

1. Select Inquiry - Reports → Conflict Inquiry
2. Type “Gateway” into the *Search for* box and click the Find button.
3. Review the output.



	Identity Code	Identity Name	Table Name	Field Name	Additional Info	Field Contents
1	0100	Gateway Insurance Company	Client	Nickname	Billing Atty: BBB - Baldwin, Brian B. Open Date: 11/4/2003	Gateway Insurance Company
2	0100	Gateway Insurance Company	Client	Reporting name	Billing Atty: BBB - Baldwin, Brian B. Open Date: 11/4/2003	Gateway Insurance Company
3	0100	Gateway Insurance Company/Main Office	Address	Name	Billing Atty: BBB - Baldwin, Brian B. Open Date: 11/4/2003	Gateway Insurance Company
4	0100 / 0001	Gateway Insurance Company / Gateway vs. Bishop Taylor, Inc	Matter	Nickname	Billing Atty: BBB - Baldwin, Brian B. Status: Open Open Date: 11/4/2003	Gateway vs. Bishop Taylor, Inc
5	0100 / 0001	Gateway Insurance Company / Gateway vs. Bishop Taylor, Inc	Matter	Reporting name	Billing Atty: BBB - Baldwin, Brian B. Status: Open Open Date: 11/4/2003	Gateway vs. Bishop Taylor, Inc
6	0100 / 0001	Gateway Insurance Company / Gateway vs. Bishop Taylor, Inc	Matter	Description	Billing Atty: BBB - Baldwin, Brian B. Status: Open Open Date: 11/4/2003	Gateway vs. Bishop Taylor, Inc
7						

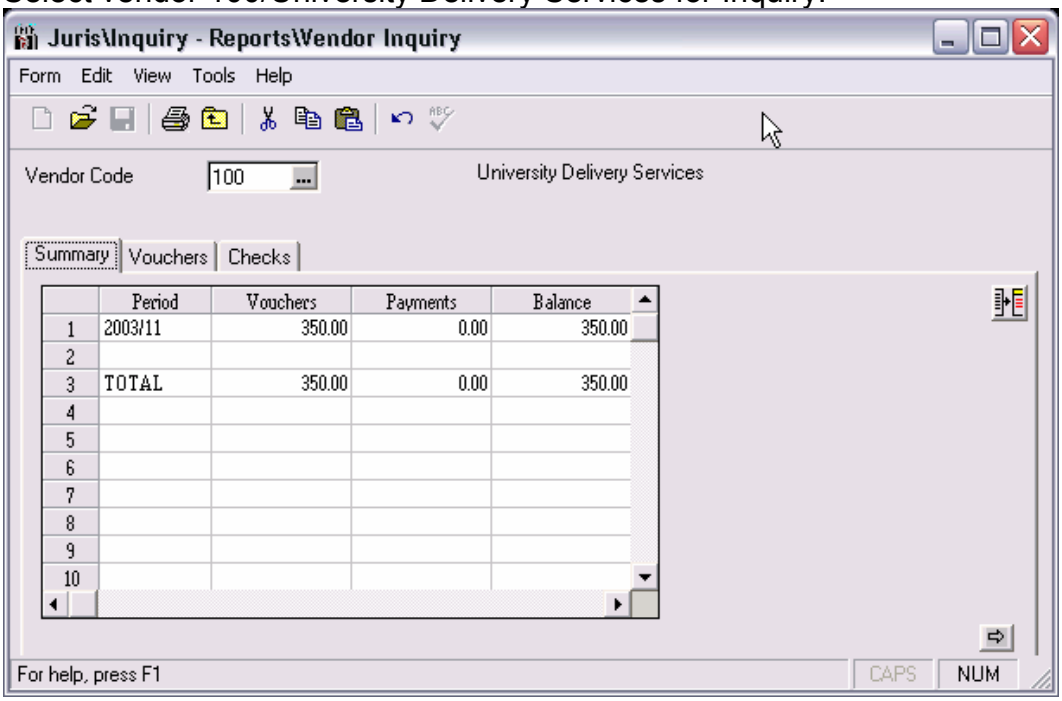
4. Click the Print Preview button and review the report.
5. Close the report preview and select *Form* → *Close*.

Vendor Inquiry

Vendor Inquiry allows a user to review the details of a particular vendor.

Exercise:

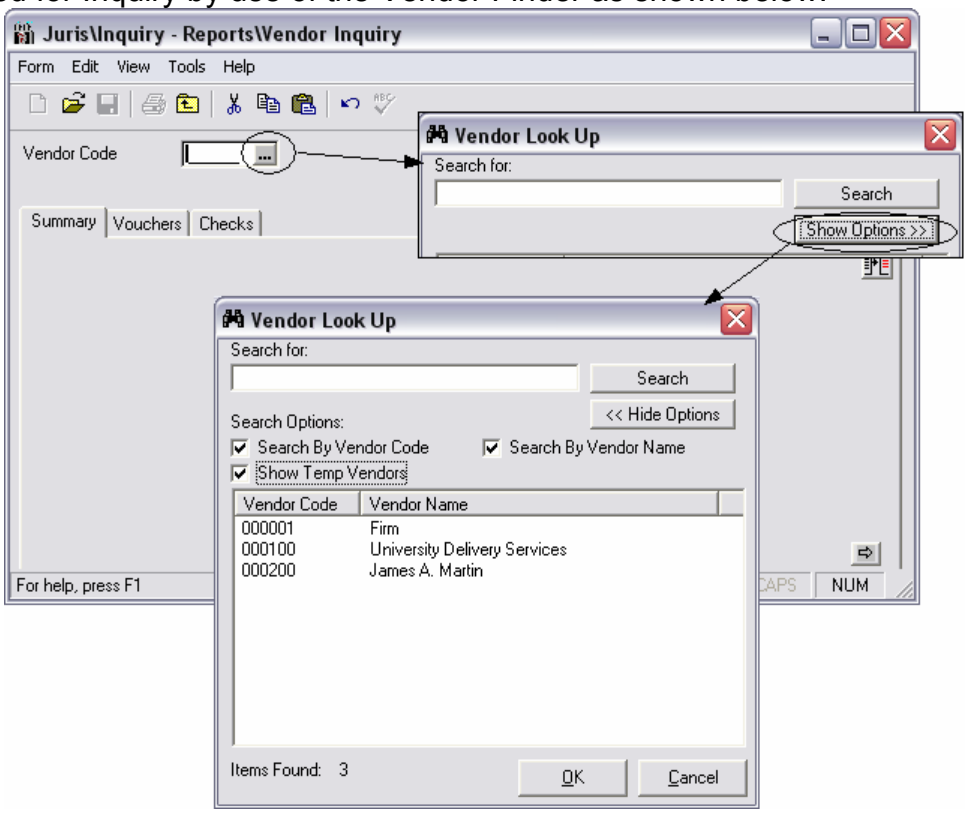
1. Select Inquiry - Reports → Vendor Inquiry
2. Select vendor 100/University Delivery Services for Inquiry.



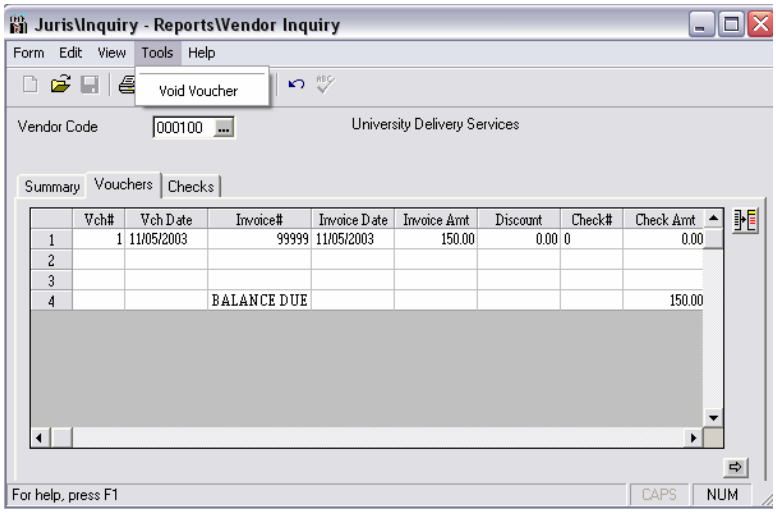
3. Select and view each of the forms: Summary, Vouchers and Checks.

Temporary Vendors

While every normal Vendor has a unique Vendor Code, all Temporary Vendors maintain the same vendor code of TEMP. The TEMP vendor code may not be keyed directly into the Vendor Code field, however, Temporary Vendors may be selected for Inquiry by use of the Vendor Finder as shown below.

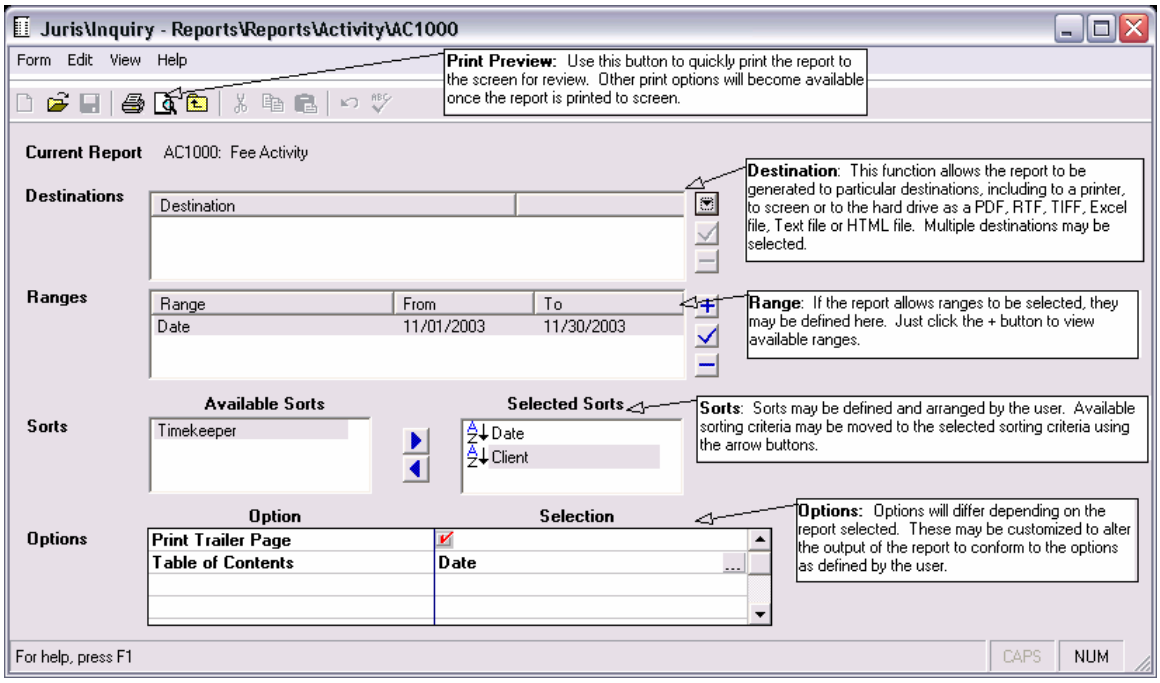


Void Voucher



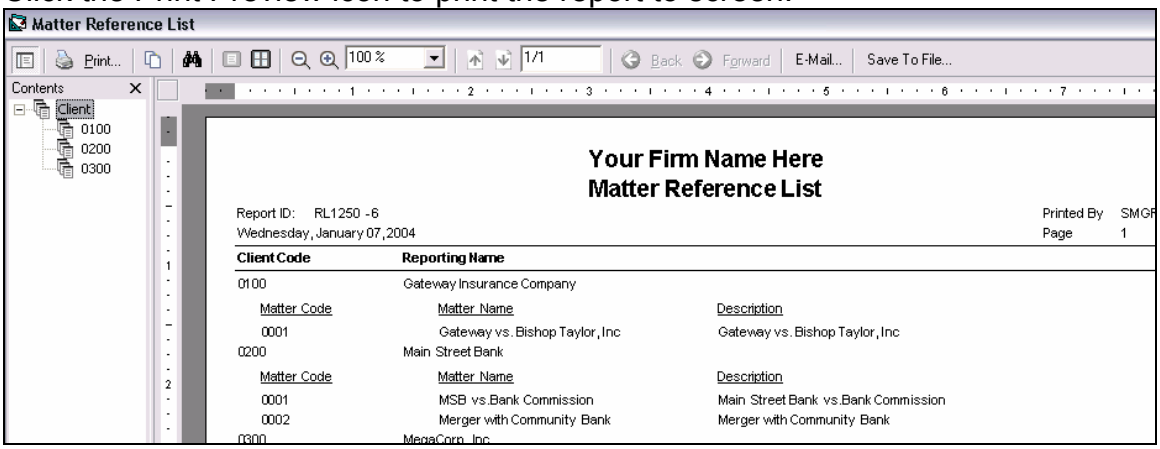
Reports

Click on *Reports* and a list of report categories will appear. Click on a category to see the reports available. Select any report by double clicking. Once a report is selected, a window will appear that shows the options available for printing a report. That window and a description of the options are shown below.



Exercise:

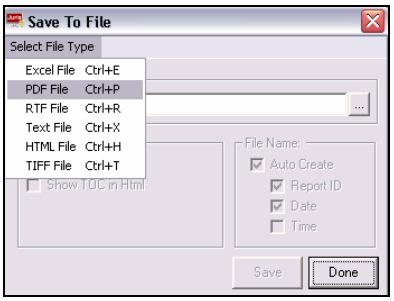
1. Select Inquiry - Reports → Reports → Reference Lists
2. Double click to select the *Matter Reference List* report.
3. Click the Print Preview icon to print the report to screen.



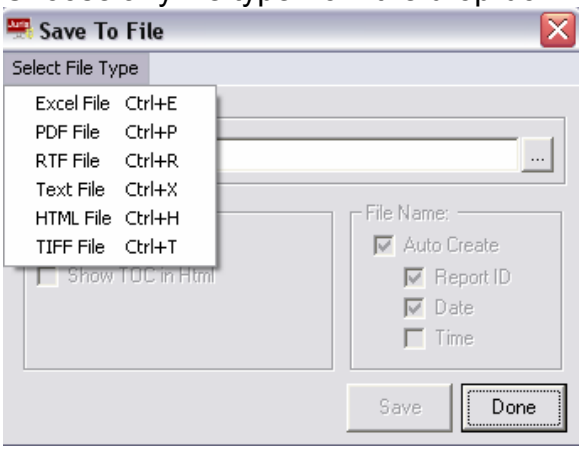
The Print Preview screen has a tree structure on the left side that allows the user to skip directly to a particular item on the report. This screen also offers the option to print the report to a printer as well as options for E-mailing the report or saving the format to file in various formats.

Exercise:

1. Select to save a report to file.
2. When the Save to File box appears –click Select File Type.



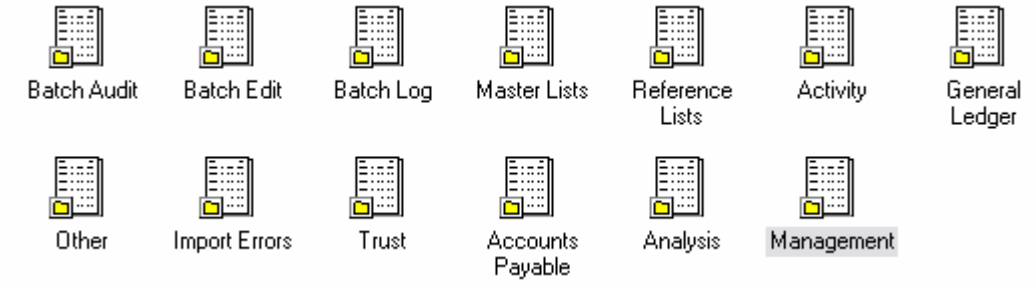
3. Choose any file type from the drop-down list.



4. Accept the default file path and click Save.

Available Reports

Reports are grouped by type. The available report types are listed below:



Batch Audit

Description	ID
General Journal Batch Audit	AL1000
Expense Entry Batch Audit List	AL1010
Time Entry Batch Audit List	AL1020
Credit Memo Audit	AL1030
Manual Bills Audit	AL1040
Posted Bills Audit	AL1050
Cash Receipts Audit	AL1060
Modify Prebill Audit	AL1070
Trust Adjustment Audit	AL1080
Voucher Audit	AL1090

Batch Edit

Description	ID
General Journal Batch Edit List	EL1000
Expense Entry Batch Edit List	EL1010
Time Entry Edit List	EL1020
Cash Receipts Edit	EL1060
Trust Adjustment Edit List	EL1080
Voucher Edit	EL1090

Batch Log

Description	ID
General Journal Batch Log	LG1000
Expense Entry Batch Log	LG1010
Time Entry Batch Log	LG1020
Credit Memo Log	LG1030
Manual Bills Log	LG1040
Cash Receipts Log	LG1060
Trust Adjustment Batch Log	LG1080
Voucher Batch Log	LG1090
Check Batch Log	LG1110

Master Lists

Description	ID
User ID Master List	ML1000
Office Code Master List	ML1050
Accounting Periods Master List	ML1060
Chart of Accounts Master List	ML1070
Timekeeper Master List	ML1080
Expense Code Master List	ML1090
Practice Class Master List	ML1100
Expense Schedule Master List	ML1120
Holiday Schedule Master List	ML1130
Personnel Type Master List	ML1140
Fee Schedule Master List	ML1150
Expense Code Cross Reference	ML1160
Task Code Master List	ML1170
Profit Center Master List	ML1190
Task Code Xref List	ML1200
Activity Code Master List	ML1220
Clients Master List	ML1230
Text Code Master List	ML1240
Matter Master List	ML1250
FS/Layout Master List	ML1260
Report Queue Master List	ML1270
Accounts Payable Master List	ML1280
Vendor Master List	ML1290
Billing Timekeeper Clients	ML1300
Bill Format Matter List	ML2000

Reference Lists

Description	ID
Office Code Reference List	RL1050
Chart of Accounts Reference List	RL1070
Timekeepers Reference List	RL1080
Practice Class Reference List	RL1100
Expense Schedules Reference List	RL1120
Personnel Types Reference List	RL1140
Fee Schedule Reference List	RL1150
Expense Code Cross Reference Lists	RL1160
Task Code Reference List	RL1170
Task Code Xref Lists	RL1200
Activity Code Reference List	RL1220
Client Reference List	RL1230
Text Code Reference List	RL1240
Matter Reference List	RL1250
Expense Code Reference List	RL1090
Holiday Codes Reference List	RL1130
Accounts Payable Reference List	RL1280
Vendor Reference List	RL1290
Billing Timekeeper Client Reference	RL1300

Activity

Description	ID
Fee Activity	AC1000
Expense Activity	AC1010
Billing Activity	AC1020
Cash Activity	AC1030
Trust Activity	AC1040
Work In Process	AC1050

General Ledger

Description	ID
General Ledger Trial Balance	GL1010
Year End Closing	GL1000
General Ledger	GL1020

Other

Description	ID
Timekeeper Diary	OT1000
Daily Time Summary	OT1020
Open Prebills	OT1040
Billing Projection	OT1050
Billing Summary	OT1070
Cash Receipts Summary	OT1080
Aged Unbilled Time	OT1110
Aged Unbilled Expenses	OT1111
Originating Timekeeper Report	OT1130
Prepaid Balance	OT2000
Cash Receipt Deposit Slip	OT2020
Time And Expense Details	OT2025
Unposted Bills Audit	OT2030
Cumulative Client/Matter Summary	OT2047

Import Errors

Description	ID
Journal Entry Import Error	ER1000
Expense Entry Import Error	ER1010
Time Entry Import Error	ER1020

Trust

Description	ID
Trust Ledger History	TR1000
Trust Bank Balance	TR1010
Trust Account Balance	TR2000

Accounts Payable

Description	ID
Aged Open Items	AP1000
Cash Requirements	AP1030
Bank Reconciliation Report	AP1040
Pre-Check Register	AP1050
Check Register	AP1060
Vendor History	AP1070
Voided Checks	AP2000

Analysis

Description	ID
Other Analysis	
Combined Analysis	
Billing Analysis	
Collection Analysis	
Working Analysis	
Aged A/R Analysis	

See Detail shown below displaying available reports for each Analysis item

Other Analysis

Description	ID
Timekeeper Analysis	OT1010
Account Analysis	OT1030
Working Timekeeper Analysis	OT1090
Expense Analysis	OT1100
Billing Timekeeper Recap	OT1120
Client/Matter Analysis	OT2010

Combined Analysis

Description	ID
Combined Analysis by Billing Agreement	AN1000
Combined Analysis by Billing Timekeeper	AN1001
Combined Analysis by Client	AN1002
Combined Analysis by Expense Code	AN1003
Combined Analysis by Office	AN1004
Combined Analysis by Originating Timekeeper	AN1005
Combined Analysis by Personnel Type	AN1006
Combined Analysis by Practice Class	AN1007
Combined Analysis by Task Code	AN1008
Combined Analysis by Working Timekeeper	AN1009

Billing Analysis

Description	ID
Billing Analysis by Billing Agreement	AN1050
Billing Analysis by Billing Timekeeper	AN1051
Billing Analysis by Client	AN1052
Billing Analysis by Expense Code	AN1053
Billing Analysis by Office	AN1054
Billing Analysis by Originating Timekeeper	AN1055
Billing Analysis by Personnel Type	AN1056
Billing Analysis by Practice Class	AN1057
Billing Analysis by Task Code	AN1058
Billing Analysis by Working Timekeeper	AN1059

Collection Analysis

Description	ID
Collection Analysis by Billing Agreement	AN1100
Collection Analysis by Billing Timekeeper	AN1101
Collection Analysis by Client	AN1102
Collection Analysis by Expense Code	AN1103
Collection Analysis by Office	AN1104
Collection Analysis by Originating Timekeeper	AN1105
Collection Analysis by Personnel Type	AN1106
Collection Analysis by Practice Class	AN1107
Collection Analysis by Task Code	AN1108
Collection Analysis by Working Timekeeper	AN1109

Working Analysis

Description	ID
Working Analysis by Billing Agreement	AN1150
Working Analysis by Billing Timekeeper	AN1151
Working Analysis by Client	AN1152
Working Analysis by Expense Code	AN1153
Working Analysis by Office	AN1154
Working Analysis by Originating Timekeeper	AN1155
Working Analysis by Personnel Type	AN1156
Working Analysis by Practice Class	AN1157
Working Analysis by Task Code	AN1158
Working Analysis by Working Timekeeper	AN1159

Aged A/R Analysis

Description	ID
Aged A/R Analysis by Billing Agreement	AN1200
Aged A/R Analysis by Billing Timekeeper	AN1201
Aged A/R Analysis by Client	AN1202
Aged A/R Analysis by Office	AN1203
Aged A/R Analysis by Practice Class	AN1204
Aged A/R Analysis by Client UDF	AN1205
Aged A/R Analysis by Matter UDF	AN1206
Aged A/R Analysis by Originating Timekeeper	AN1207

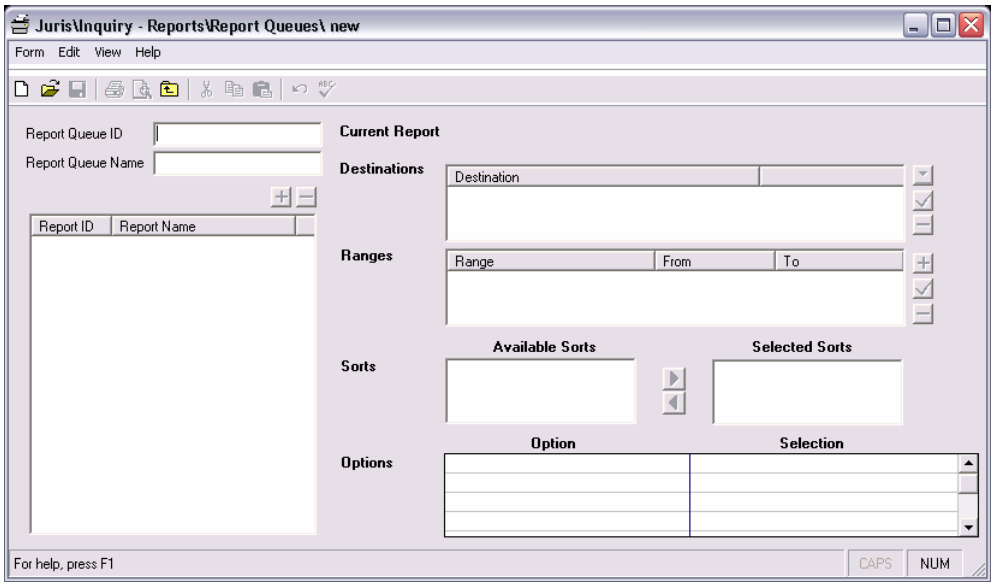
Management

Description	ID
Top Clients -- Fees Billed	MR2000
Top Clients -- Fees Received	MR2001
Top Clients -- Accounts Receivable	MR2002
Top Clients -- Unbilled Fees	MR2003
Top Clients -- Unbilled Expenses	MR2004
Reprint Trailer Page	MR2005

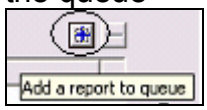
Report Queues

Exercise:

1. Select Inquiry - Reports → Report Queues
2. Click the new icon to open a new report queue.
3. Enter the Report Queue ID of “MONT“ and the Report Queue name of “Monthly Reports“ and click the Save icon to save the Queue.

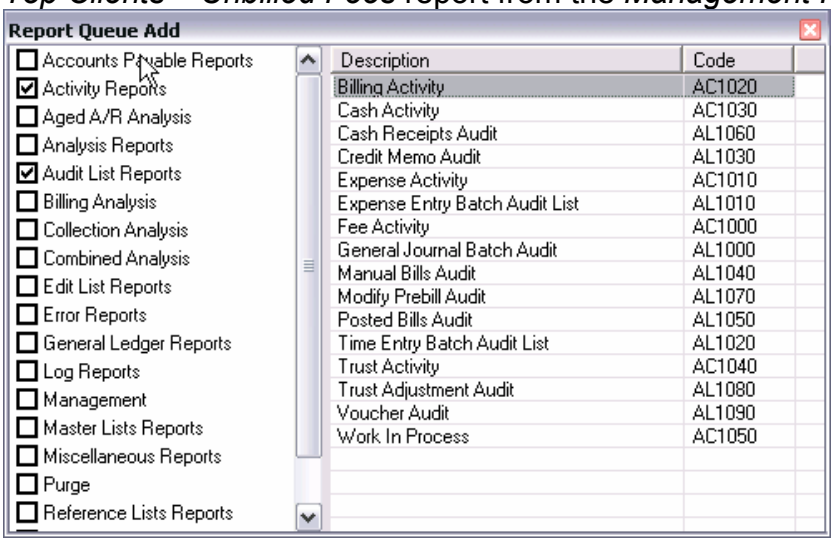


4. Then click the plus button below the Report Queue Name to add reports to the queue

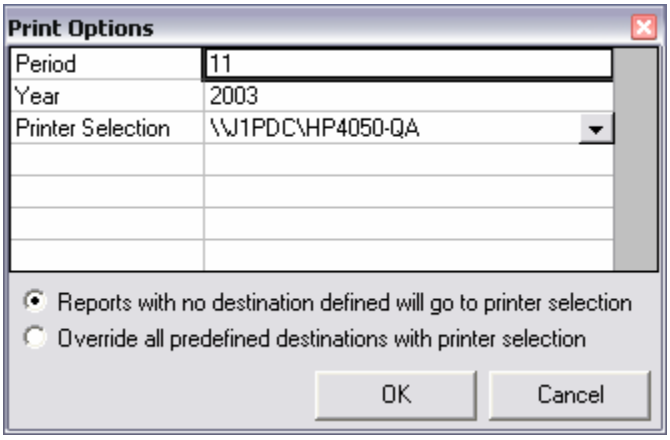


5. Place a checkmark beside an item to view the reports available for that category. The report names will appear on the right side of the screen. Double click on a report in the list to add that report to the queue. Select the

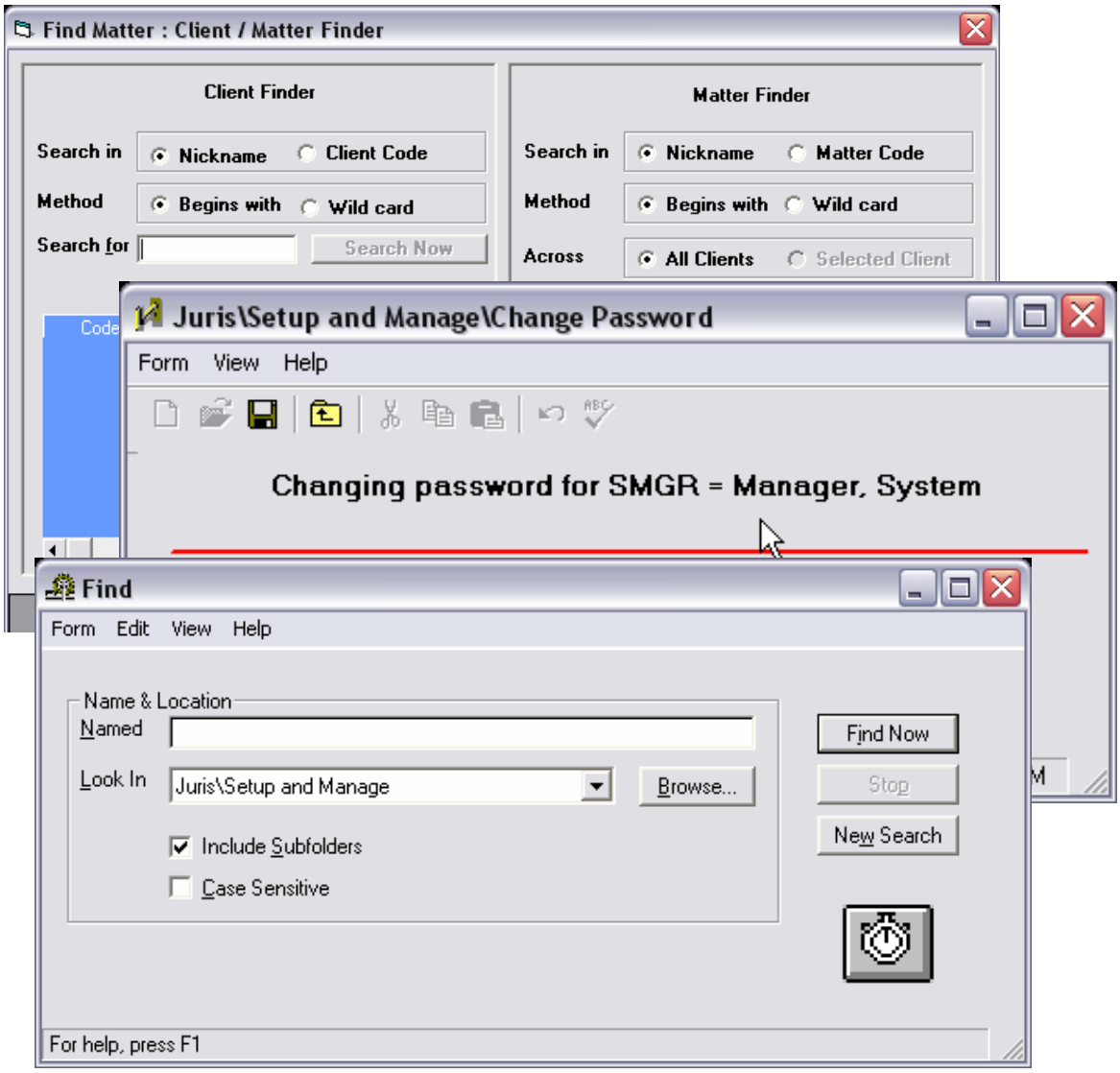
Top Clients – Unbilled Fees report from the *Management Reports* category.

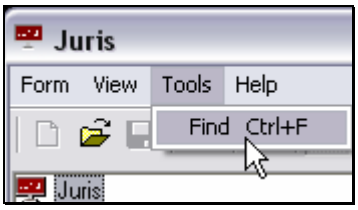


6. Choose the Destination; Range; Sorts and Options from the right side of the screen.
7. Save the queue and print. The screen below will appear. Make your selection and click OK.



OTHER


Find Matter : Client / Matter Finder
Client Finder
Search in
Nickname
Client Code
Method
Begins with
Wild card
Search for
Search Now
Matter Finder
Search in
Nickname
Matter Code
Method
Begins with
Wild card
Across
All Clients
Selected Client
Juris\Setup and Manage\Change Password
Form View Help
Changing password for SMGR = Manager, System
Find
Form Edit View Help
Name & Location
Named
Look In
Juris\Setup and Manage
Browse...
Include Subfolders
Case Sensitive
Find Now
Stop
New Search
For help, press F1

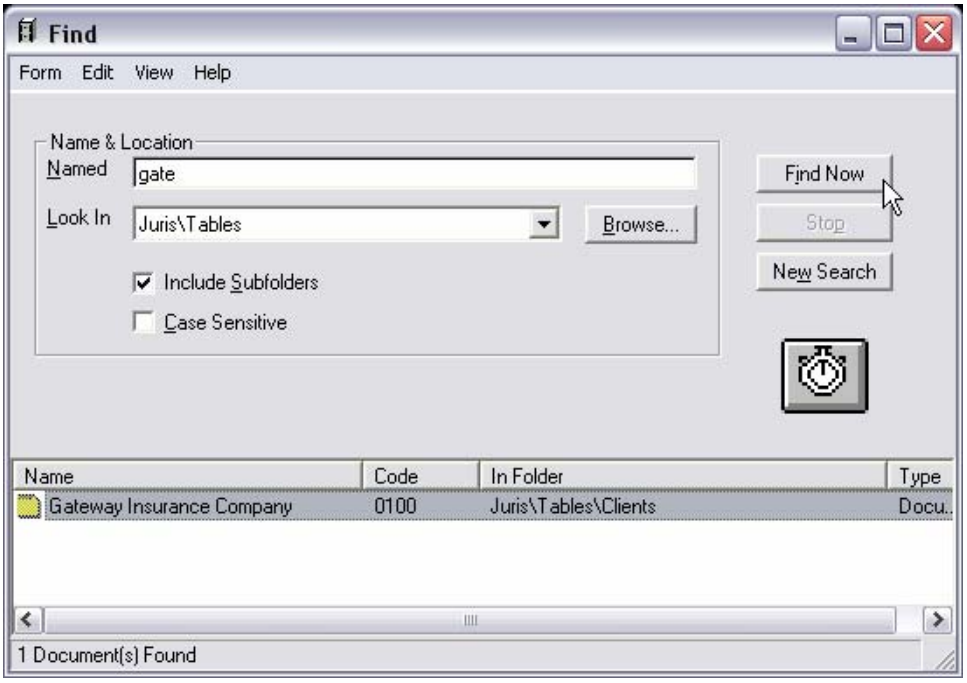


Find

The *Find* feature may be used to search Juris for a particular item. The finder may be accessed from many areas of Juris by selecting *Tools* → *Find*.

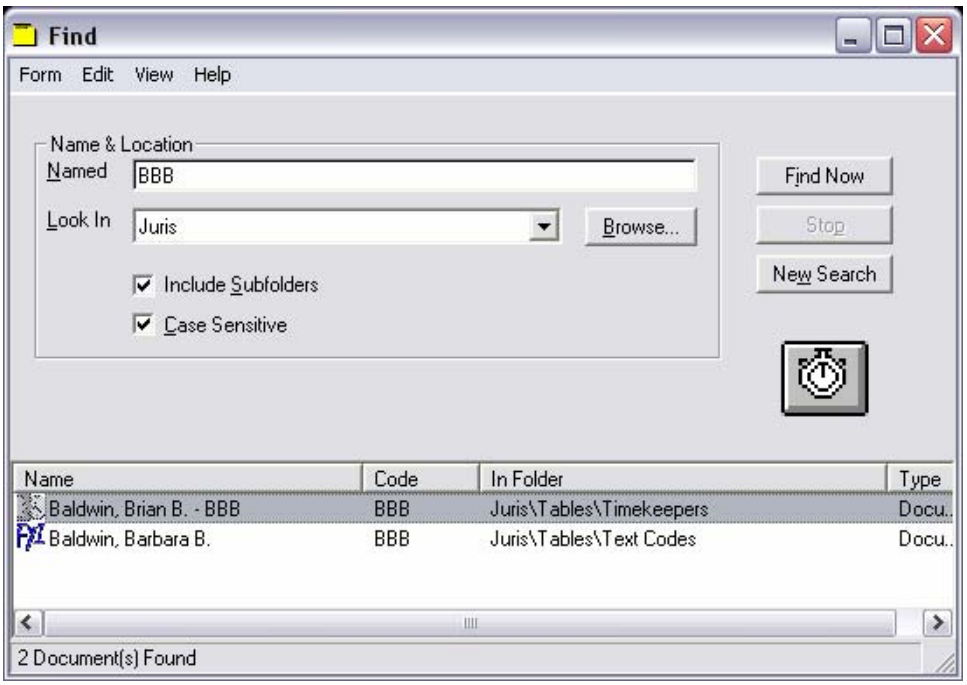
Exercise:

1. With the Tables area selected, select *Tools* → *Find* to open the finder.
2. Type in the text 'gate' in the *Named* box– notice that the *Look In* is pre-populated with the current area of focus, which is Juris/Tables. Accept all other defaults and click *Find Now*.



3. Review the output.
4. Click the *New Search* button.
5. Type in the text 'BBB' in the *Named* box – use the Browse button to change the *Look In* option to Juris.

6. Place a checkmark in the *Case Sensitive* option. Accept all other defaults and click *Find Now*.

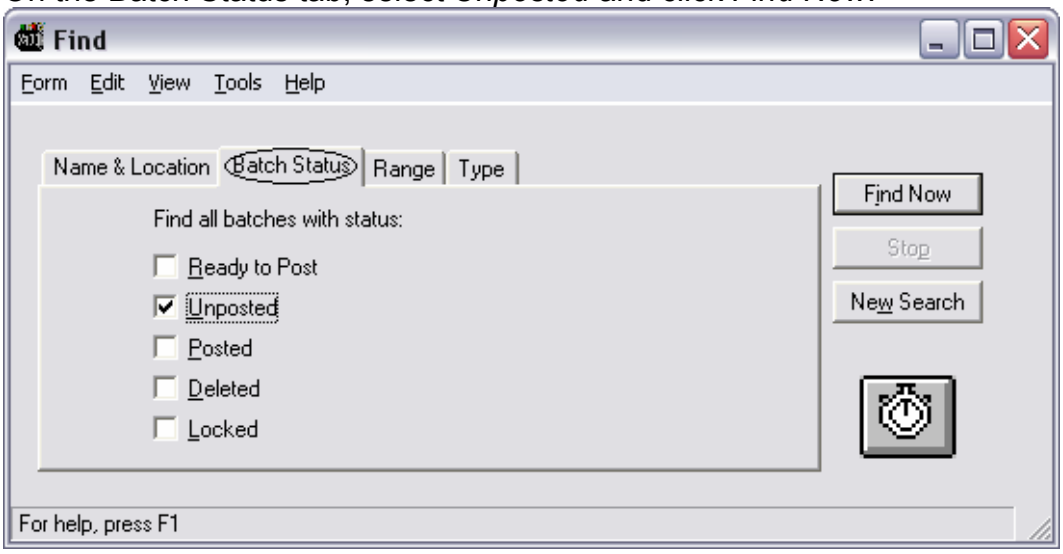


7. Double-click on one of the found items. Review. Then close the forms.

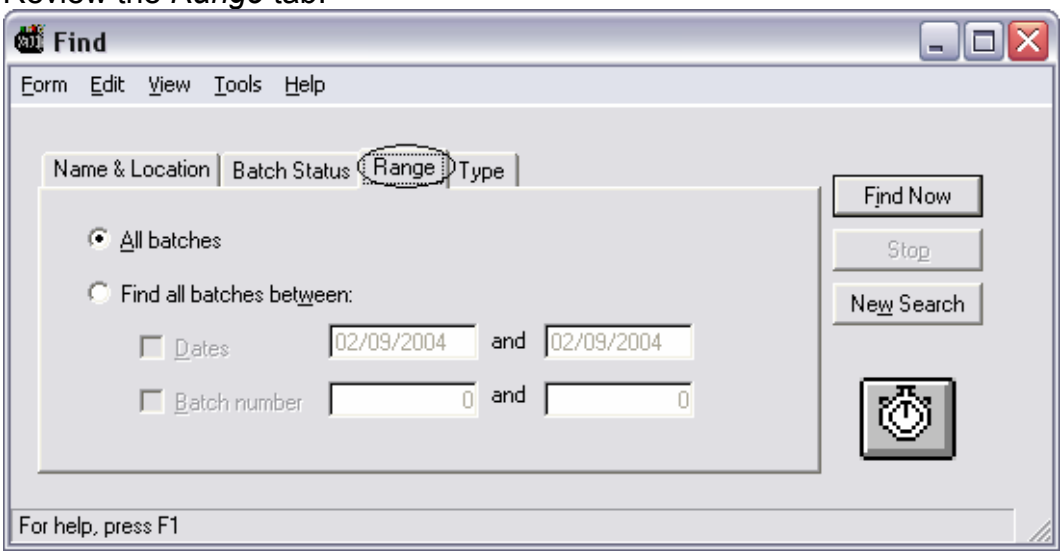
Exercise:

Find can also be used to locate items by status, range and type.

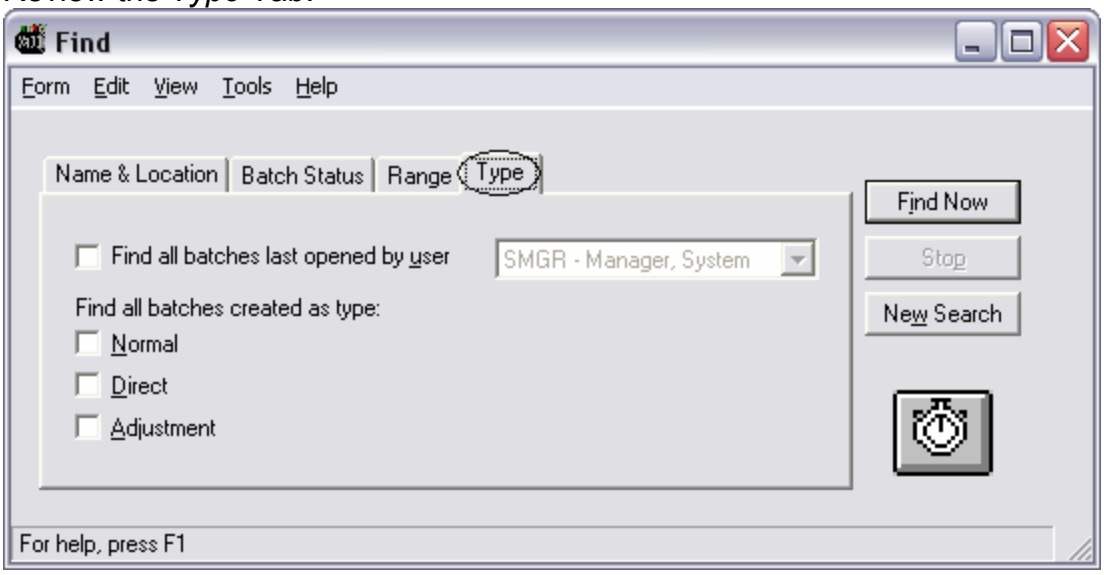
1. In Juris, go to Transactions → Time Entries and select *Tools→ Find*.
2. On the Batch Status tab, select *Unposted* and click *Find Now*.



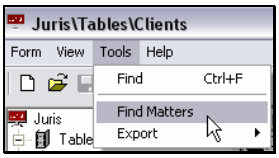
3. Review the *Range* tab.



4. Review the *Type* Tab.



5. When finished with review, close the form.

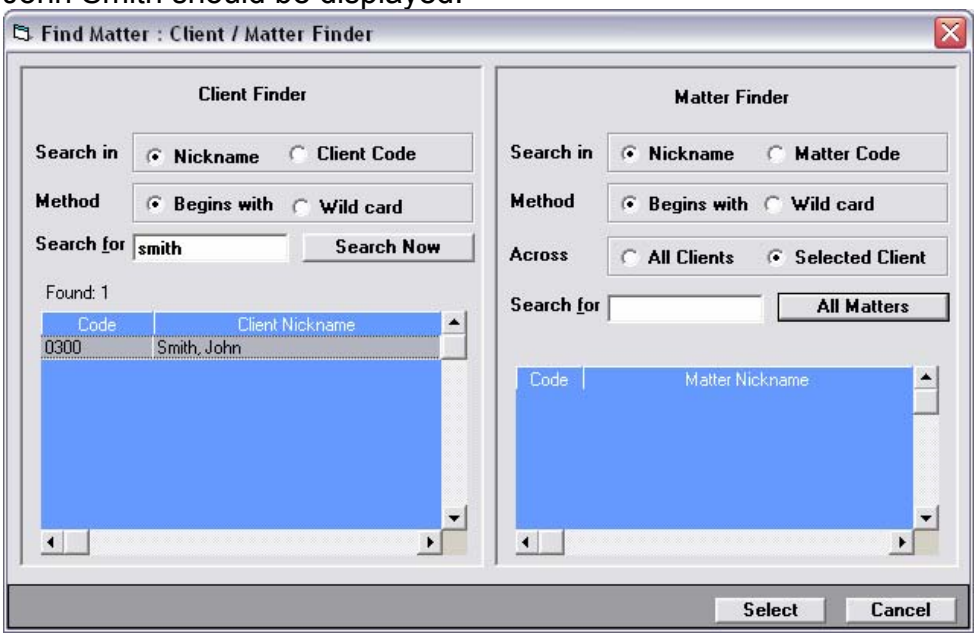


Client/Matter Finder

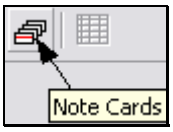
The Client/Matter finder may be used to lookup a client and/or matter by code or nickname.

Exercise:

1. Open a new time entry and enter a date and timekeeper. While in the Client field, click the lookup button ... with the mouse or type the down arrow on the keyboard to access the Client/Matter Finder.
2. Enter the search as shown below, then click *Search Now*. The client 0300 John Smith should be displayed.



3. On the Matter Finder (right side of the window) click *All Matters*.
4. With Client 0300/Matter 1 highlighted, click the *Select* button. This will populate the form with the selected client/matter.
5. Close the time entry and do not save. Open a new time entry and enter a date and timekeeper.
6. Enter the client code of 0100 and then go to the matter field. While in the Matter field click the binocular icon with the mouse, or type the down arrow on the keyboard to access the Client/Matter Finder. Notice that the client code is pre-populated with client 0100 – Gateway Insurance Company.
7. Click the *All Matters* button to populate the Matter side with all available matters for Client 0100.
8. With Client 0100/Matter 1 highlighted, click the *Select* button. This will populate the form with the selected client/matter. Close the time entry and the time batch. Do not save.

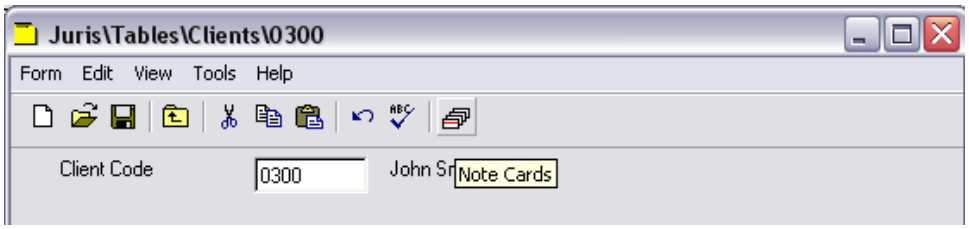


Notecards

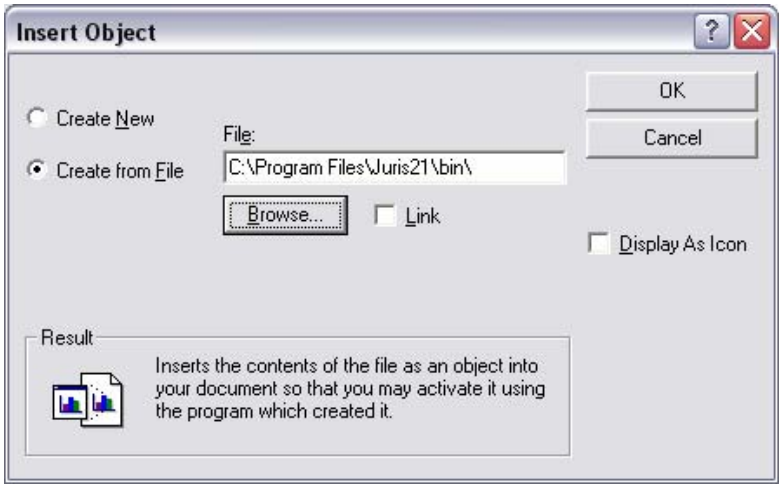
Notecards are available in several areas of Juris: Clients, Matters, User ID's, Timekeepers, Vendors and Chart of Accounts. *Notecards* may be used to add text or attach files (objects) to an item. Objects that may be attached to a Notecard include word processing documents, graphic images, media files, spreadsheets and more.

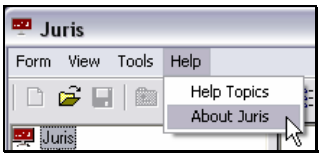
Exercise:

1. Open the client *John Smith*.
2. Select the *Notecard* icon.



3. Click the *New Card* button, type the caption "Inception Date" and click OK.
4. The system will have created a new notecard with the caption entered above, and will place the cursor in the notecard to allow text to be entered. Type today's date and click the save icon.
5. Click the *New Card* button again. Type the caption of "Incorporation."
6. Click the lookup button ... and select the "CORP" text code.
7. Click the *New Card* button again. Type the caption of " Attachments"
8. Click *Insert* → *Object* and review the options for attaching files to notecards. Close the forms when finished with review.





About Juris

The *About Juris* option is available from the Help menu in any area of the Juris program. This screen contains Juris version information as well as links to submit a support request via e-mail, open the Juris' Website, or review detailed system information.

E-mail Juris Support

The *E-mail Juris Support* link will open a blank e-mail message, pre-addressed to Juris support (supportcall@juris.com) and will include the firm's Client Number as the first 4 digits of the subject line of the message. The user simply needs to type a short description of the problem into the body of the e-mail and send the message to Juris. A Juris Support Professional will contact the user to resolve the issue.

This function requires that the user has a MAPI-compliant e-mail package installed and functioning on the workstation.

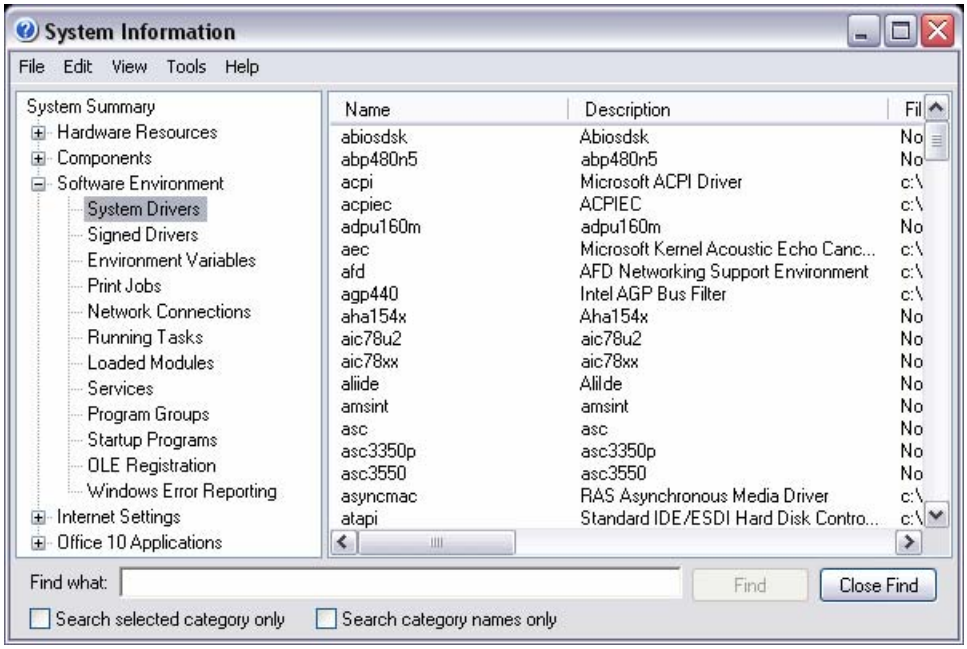
www.juris.com

The *www.juris.com* link will take the user to the Juris Website. The user must have internet access on the workstation in order to use this feature.

System Information

The *System Information* button opens a screen that contains details about the configuration of hardware, software and other computer components.

This information may be needed by your Juris support representative to troubleshoot issues that may arise. Your network administrator may also require access to this information as well.

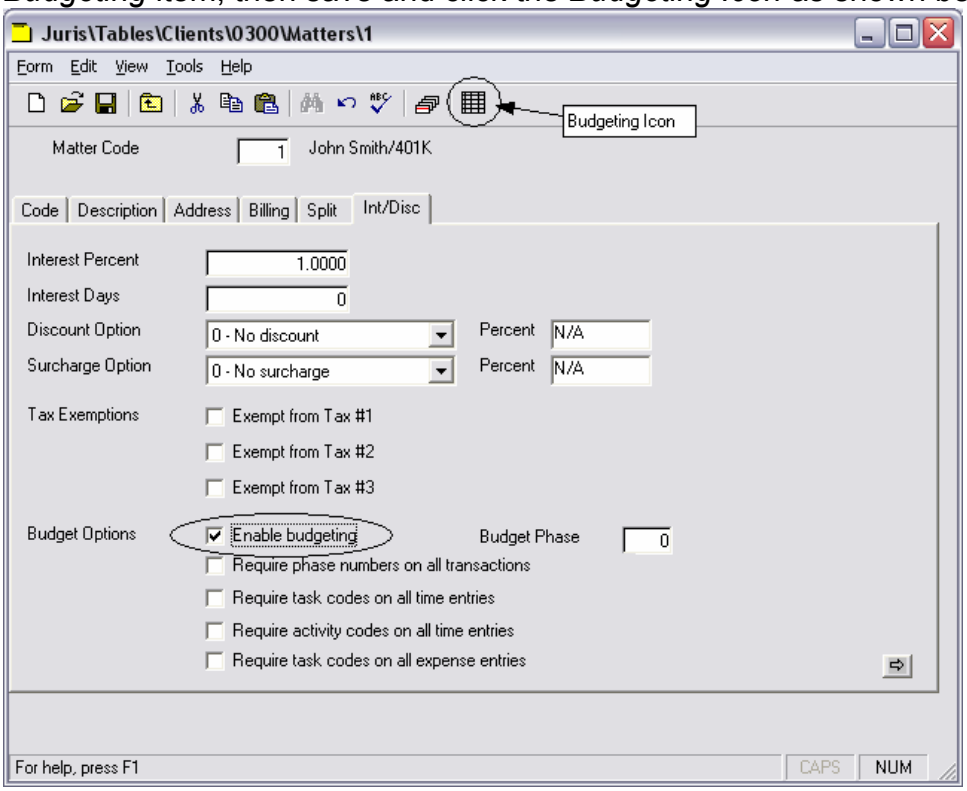


Client/Matter Budgets

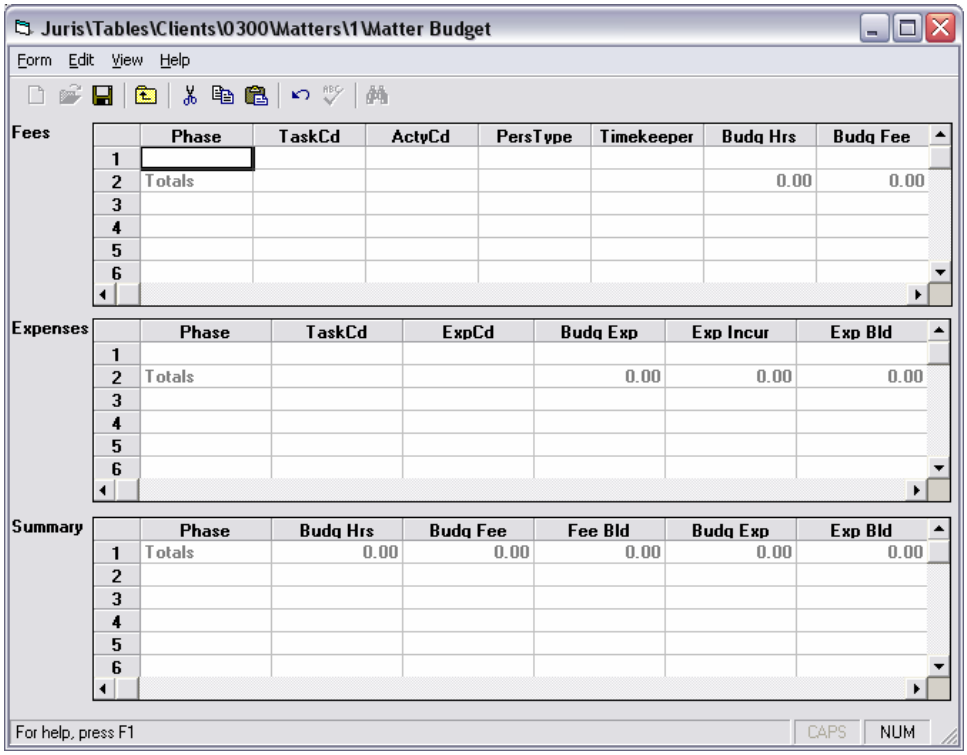
Client/Matter Budgets can be used to plan the budgeted amount of fees and expenses anticipated for a matter. The items may be budgeted by phase, Task Code, Expense Code, Personnel Type, Timekeeper, etc.

Exercise:

1. Open Client 300/Matter 1 and go to the Int/Disc Tab. Click the *Enable Budgeting* item, then save and click the *Budgeting Icon* as shown below.



2. The Client/Matter budget form will open as shown below. Close the form when finished with review.

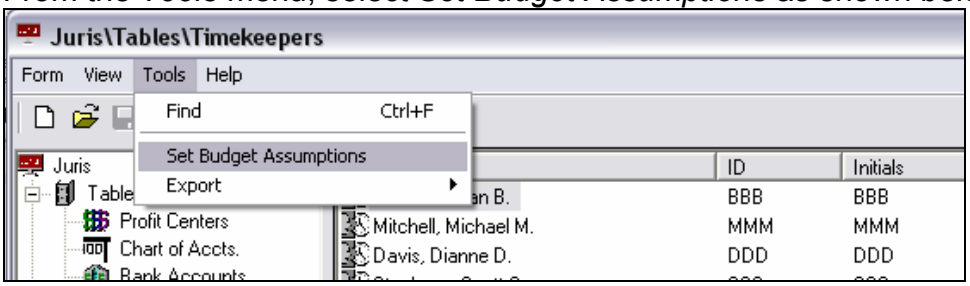


Timekeeper Budgets

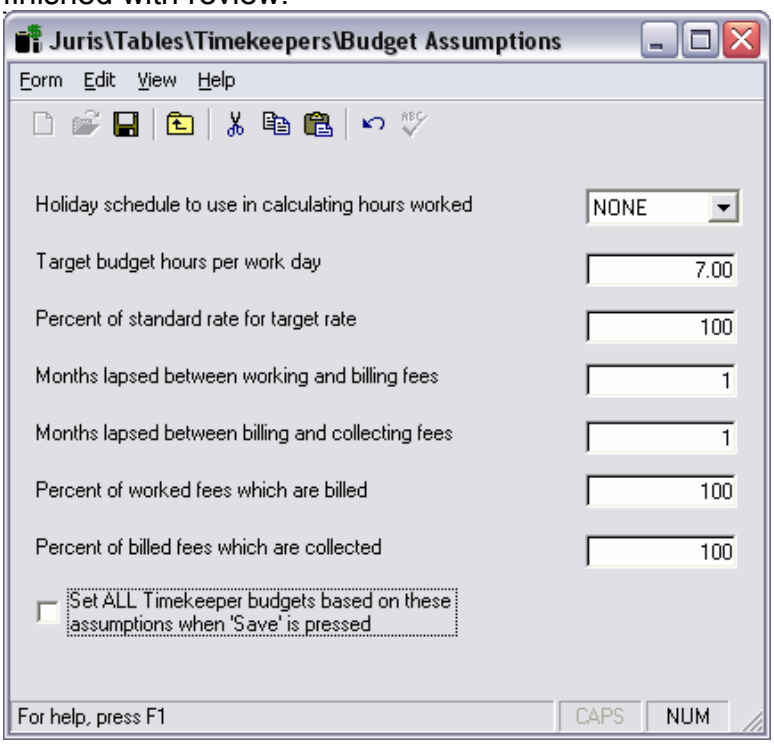
Timekeeper Budgets can be used to plan a timekeeper's expected yield based on average hours worked per day, percent of worked fees that are typically billed, percent of billed fees that are typically collected, and other factors.

Exercise:

1. In Juris, go to Tables → Timekeepers
2. From the *Tools* menu, select *Set Budget Assumptions* as shown below.

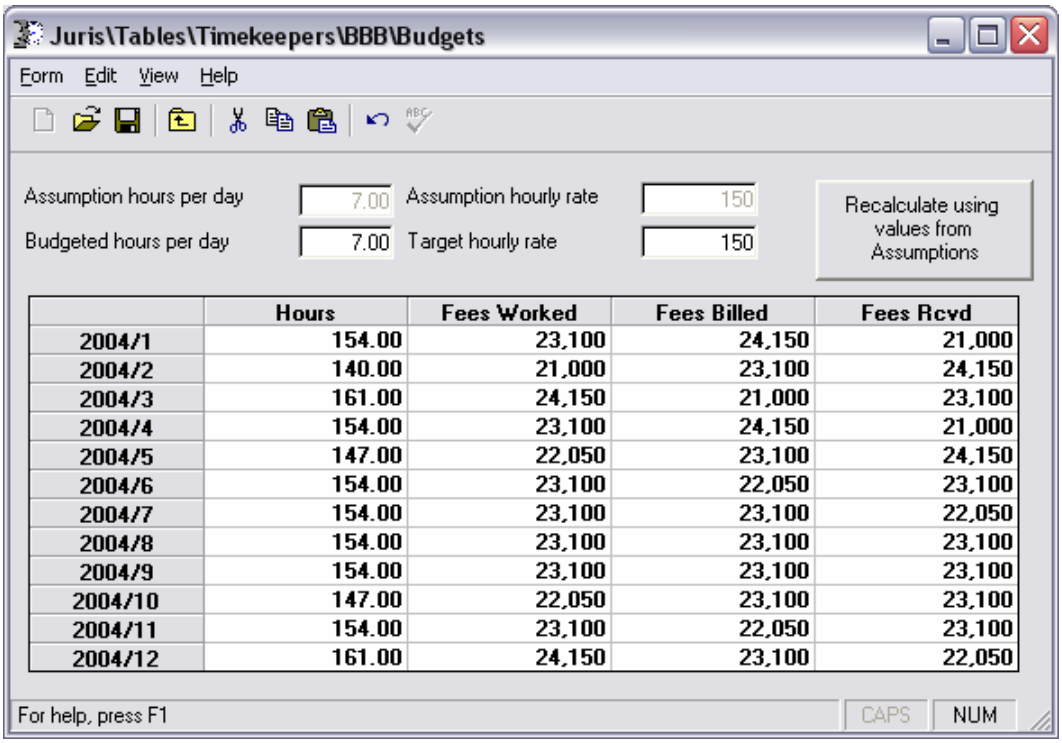


3. Review the Budget Assumptions form as shown below. Close the form when finished with review.



4. Open Timekeeper BBB and select the Budgets icon.

5. Review the Timekeeper Budget form as shown below. Close the form when finished with review.



	Hours	Fees Worked	Fees Billed	Fees Rcvd
2004/1	154.00	23,100	24,150	21,000
2004/2	140.00	21,000	23,100	24,150
2004/3	161.00	24,150	21,000	23,100
2004/4	154.00	23,100	24,150	21,000
2004/5	147.00	22,050	23,100	24,150
2004/6	154.00	23,100	22,050	23,100
2004/7	154.00	23,100	23,100	22,050
2004/8	154.00	23,100	23,100	23,100
2004/9	154.00	23,100	23,100	23,100
2004/10	147.00	22,050	23,100	23,100
2004/11	154.00	23,100	22,050	23,100
2004/12	161.00	24,150	23,100	22,050

Change Password

The *Change Password* function allows the user to change their Juris login password. The password may be up to 6 characters in length and is case-sensitive.

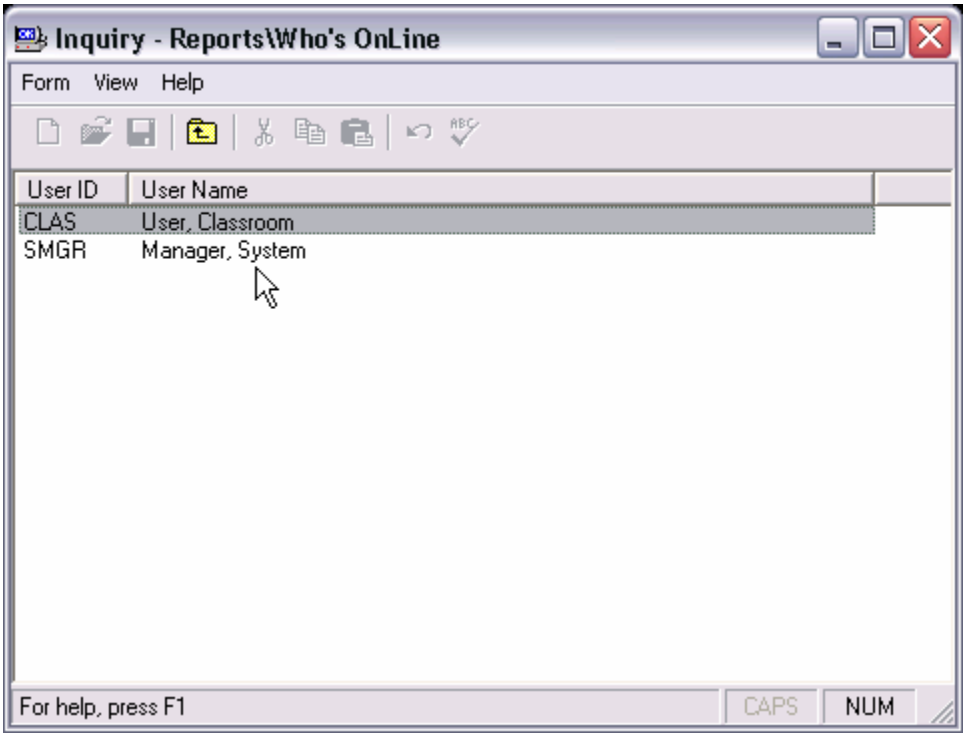
Exercise:

1. Open Setup and Manage → Change Password
2. Enter smgr (lowercase) as the old password and SMGR (uppercase) as the new password. Confirm by retyping the new password in the space provided.
3. Save and close the form.
4. Close Juris and log back in. Use the login SMGR and new password: SMGR (uppercase).

Who's OnLine

Exercise:

4. Select Inquiry - Reports → Who's OnLine
5. Review the screen – then select *Form → Close.*

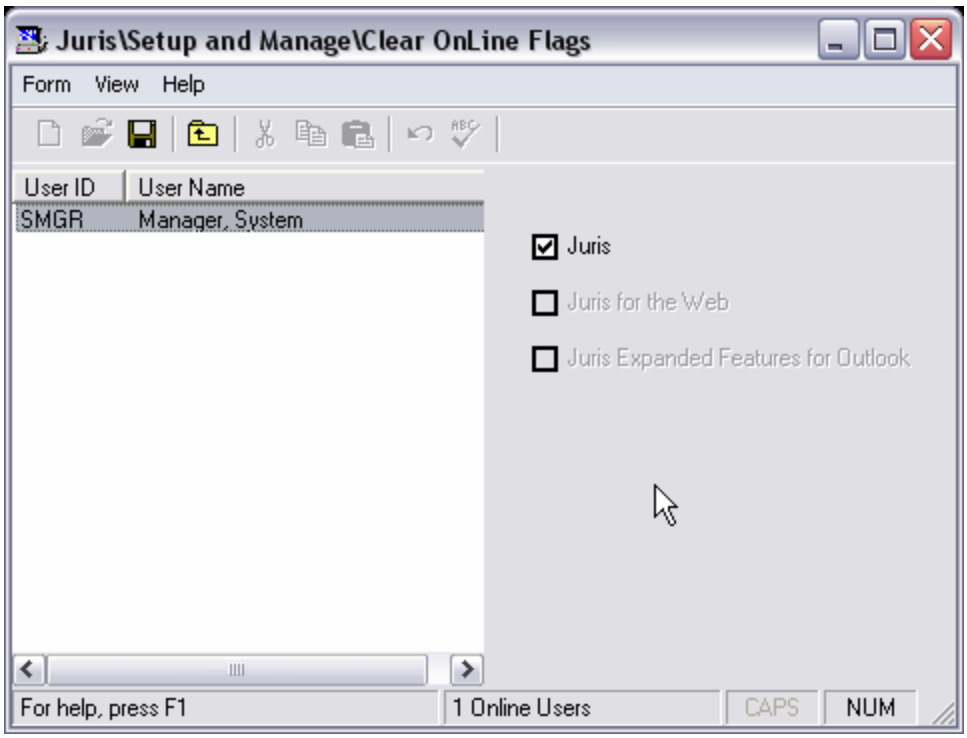


Clear Online Flags

The *Clear Online Flags* function is used to view a list of users who are currently logged into Juris, Juris for the Web® or Juris Expanded features for Outlook® and is also used to unlock a user who may have been locked out of Juris, Juris for the Web® or Juris Expanded features for Outlook® due to an improper exit or ejection from the application.

Exercise:

1. Go to Setup and Manage → Clear OnLine Flags
2. Review the information on the screen. Close the form when finished.

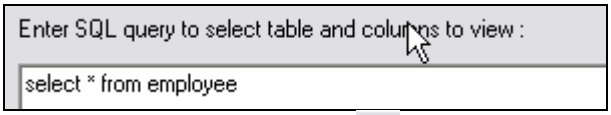


View Tables

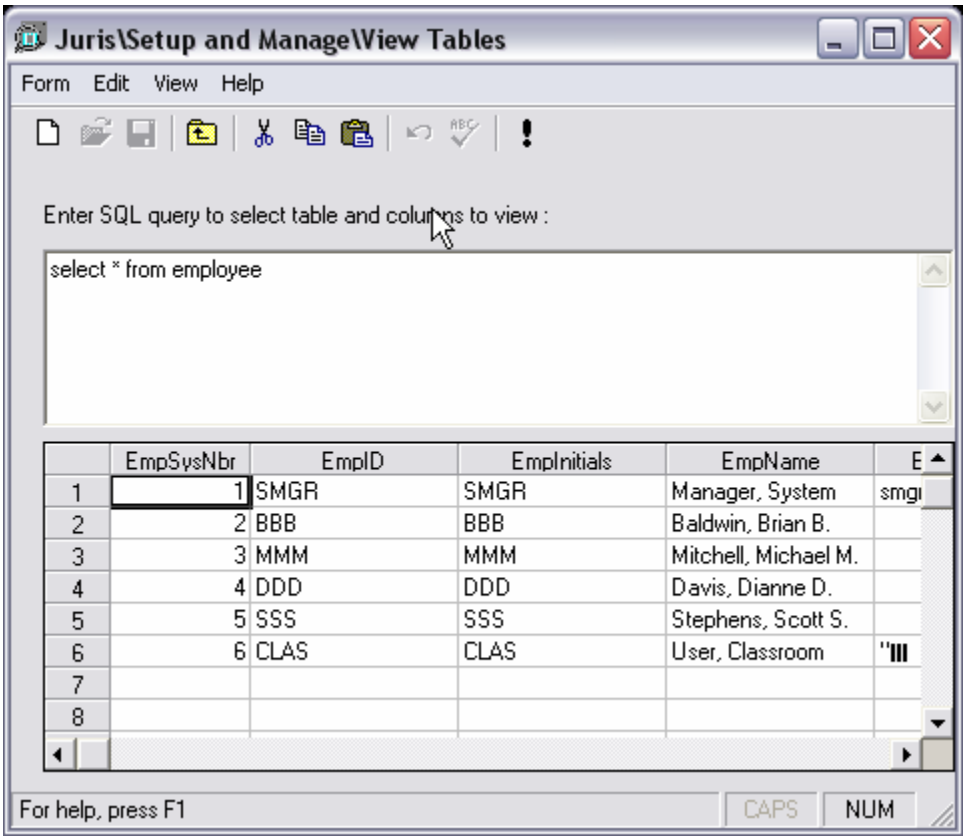
The *View Tables* function allows users to perform SQL queries on the Juris database. Knowledge of SQL (Structured Query Language) is necessary in order to construct queries according to SQL programming conventions.

Exercise:

1. Open Setup and Manage → View Tables
2. Enter the following, simple SQL query into the space provided as shown below:



3. Click the Execute button ! to perform the query.
4. Review the results that are returned. Close the form when done.

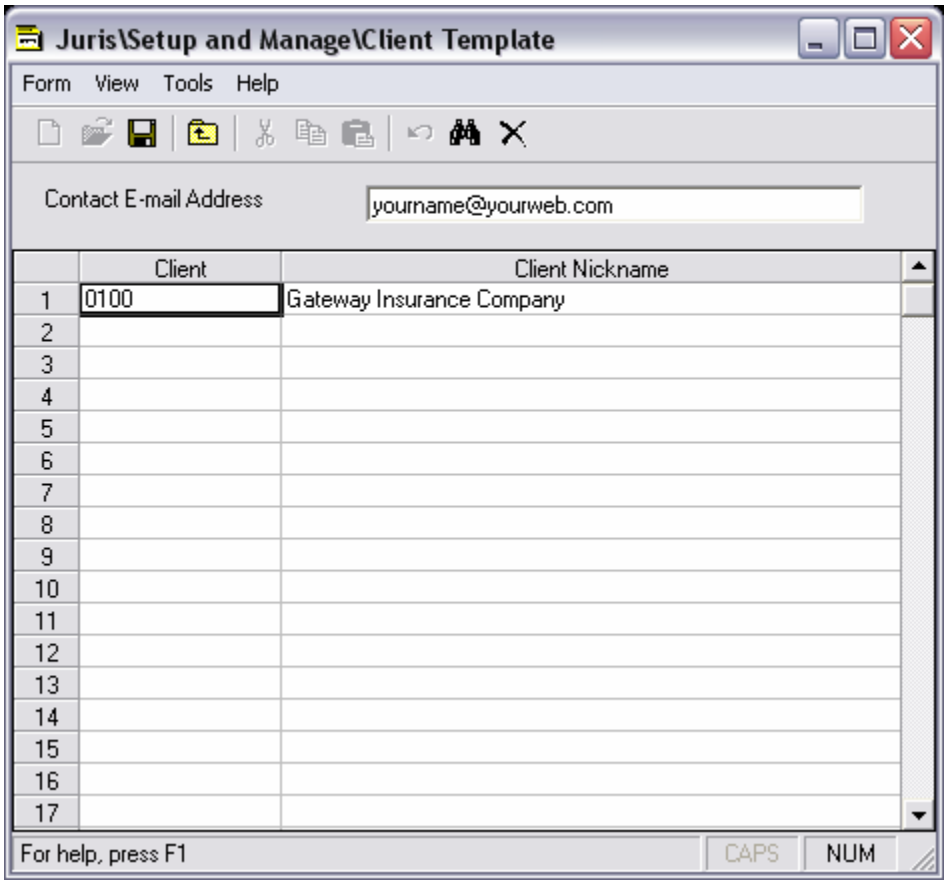


Client Template

At least one *Client Template* must be established in order to allow Clients and Matters to be added to Juris from *Juris for the Web®* as well as from other third party software that integrates with Juris. *Client Template* is only available when Juris is in Maintenance Mode.

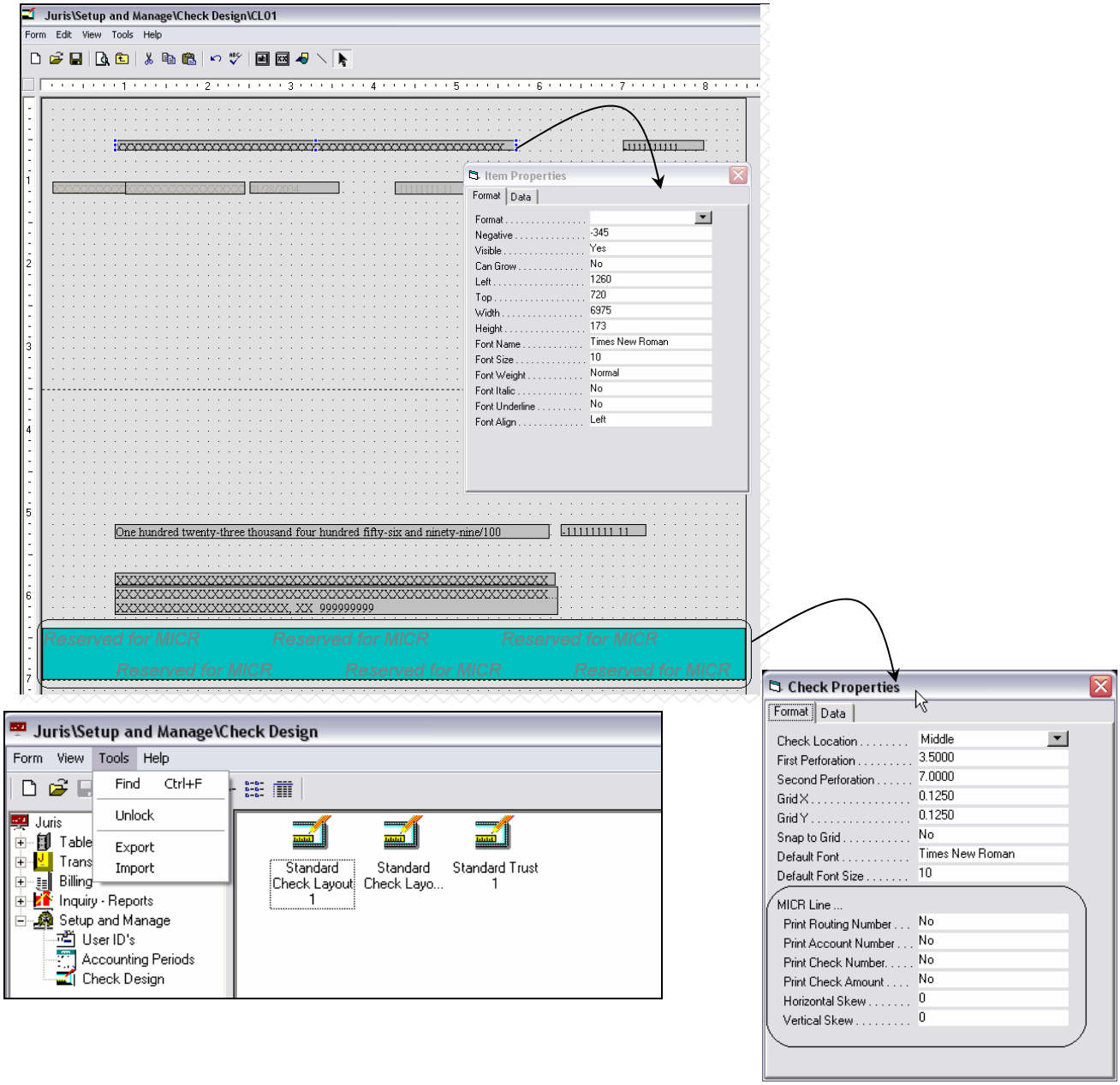
The contact e-mail address is optional, and requires that a MAPI-compliant e-mail package is installed on the machine. If the contact e-mail address is used, the system will send an e-mail notification to that contact each time a client or matter is added to Juris through an external source.

Any existing client may be used as a template, although it is recommended to establish a 'fake' client or clients to be specifically used as templates.



Check Design

The *Check Design* function allows the user to modify the design of check output to correspond with the check form and customize check output.

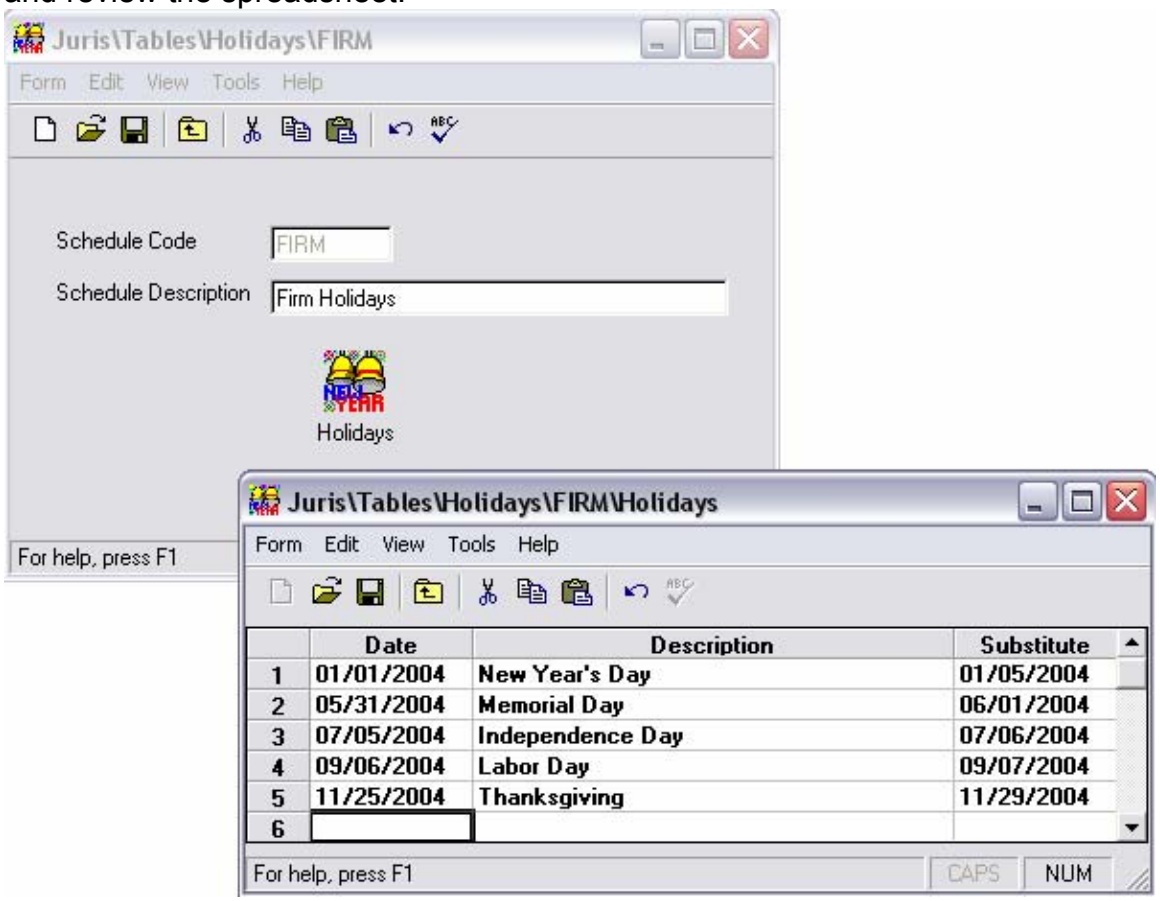


Holidays

Holidays may be used to establish the firm's holiday schedule, which is used for timekeeper Budgets.

Exercise:

1. Select Tables → Holidays
2. Select *Firm Holidays* for review. Make sure to click on the *Holidays* icon and review the spreadsheet.

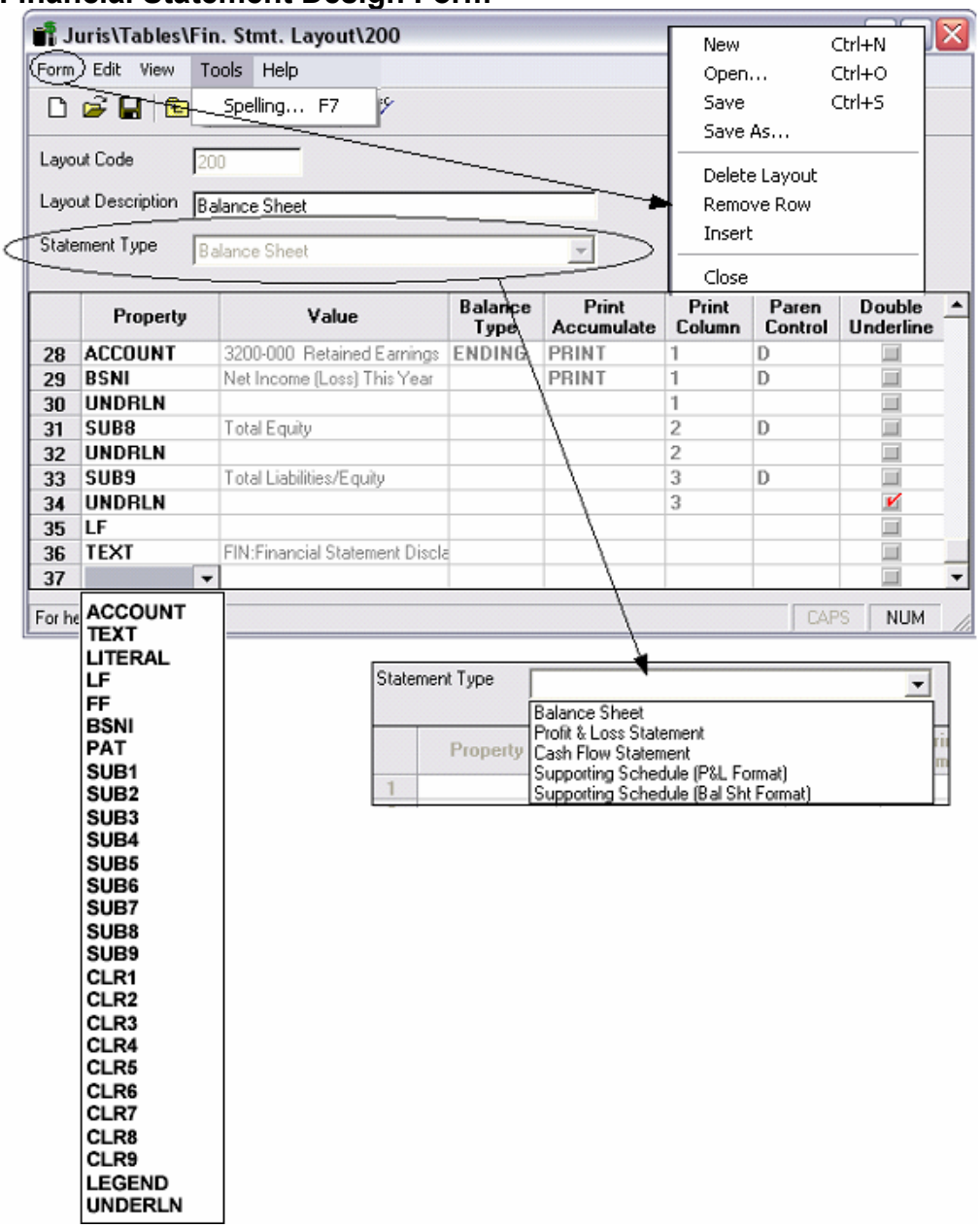


3. Close the forms when finished with review.

Financial Statement Layout

Financial Statement Layouts are used to create Balance Sheet, Profit and Loss, Statement of Cash Flow and supporting schedules from the general ledger. Layouts may also be imported and exported.

Financial Statement Design Form



Simply assign a Layout Code and Layout Description, choose the statement type from the drop down menu and then begin to select items in the spreadsheet

portion of the form to define the financial statement output. Your instructor will discuss details about creating line items, subtotals, formatting and printing financial statements.

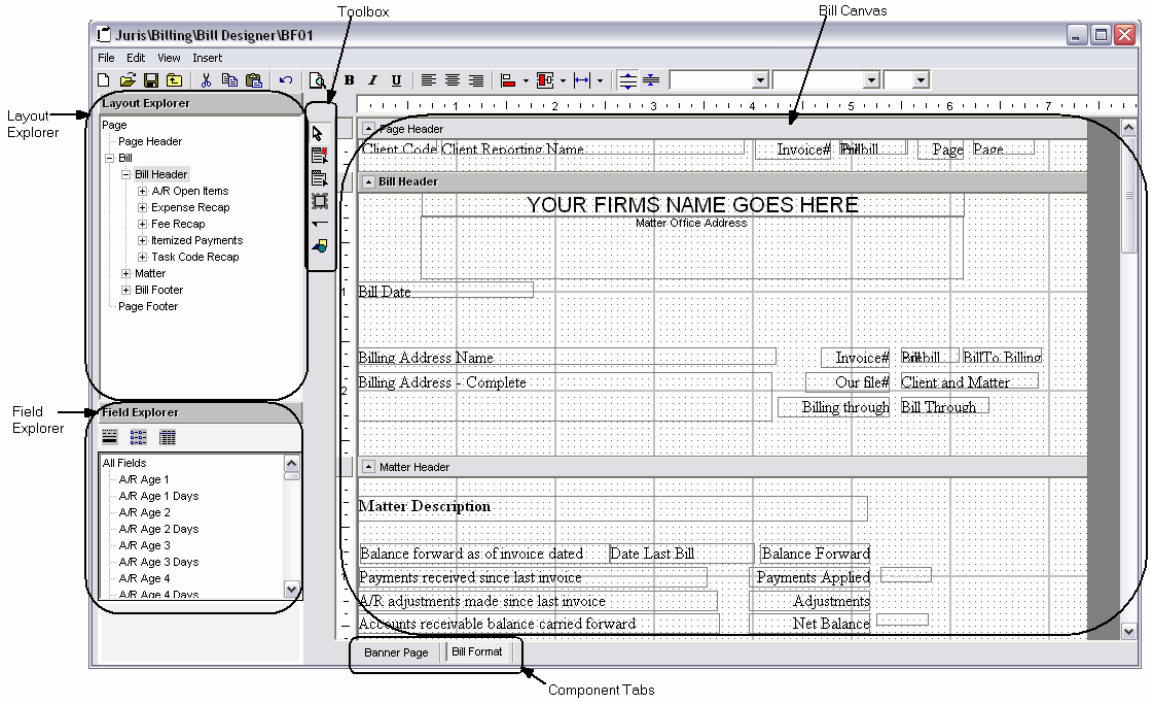
Bill Designer

The *Bill Designer* allows the user to format the output of client bills by creating custom bill formats. The Juris CD contains several pre-designed formats – and more formats are available from *www.juris.com* – but some users prefer to customize their own bill designs.

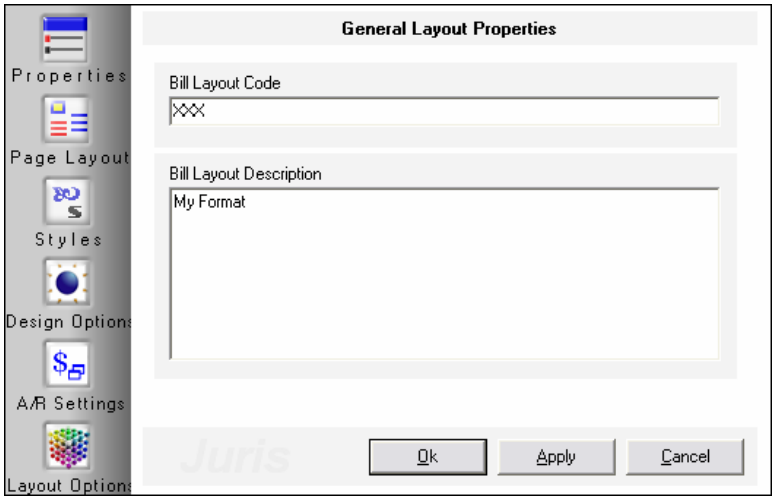
Notes:

Exercise:

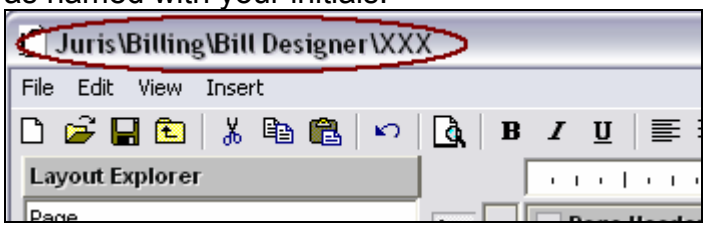
1. Open Billing → Bill Designer .
2. Open the format: *BF01 –Basic Format;* by double clicking the format description in the list of existing formats.
3. Review the Bill Designer screen as shown below:



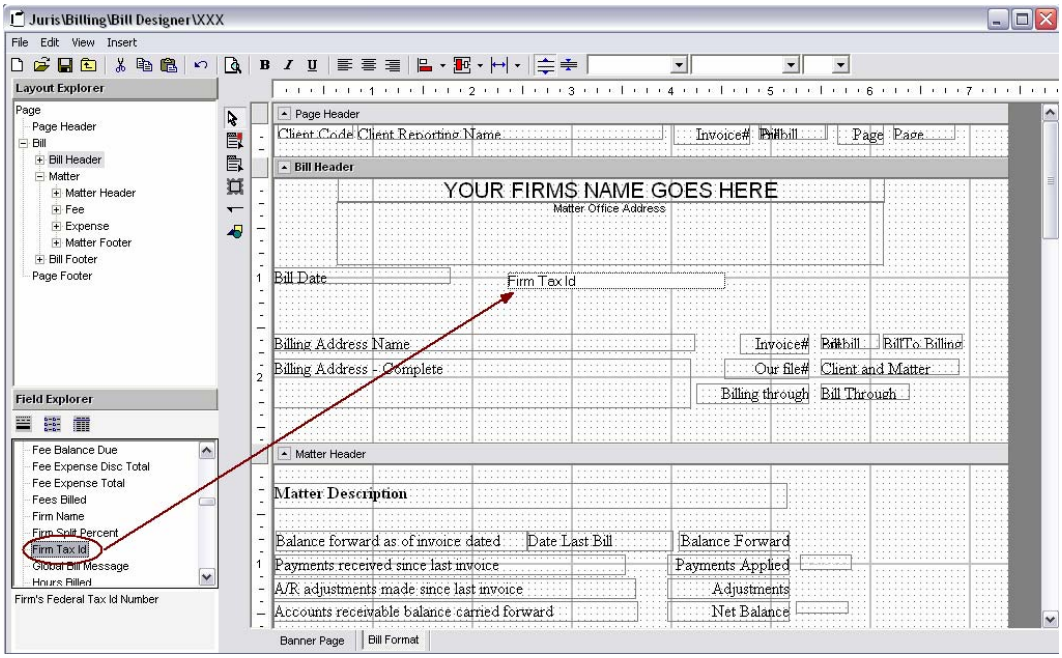
4. Save a copy of this format for editing. Select *File* → *Save As* and the screen shown below will appear allowing you to assign a name and description for thee new format. Save the format using a bill layout code of your initials. Type in any Bill Layout Description you like and click the OK button.



5. Notice that the format on the screen changes to show the new format as named with your initials.

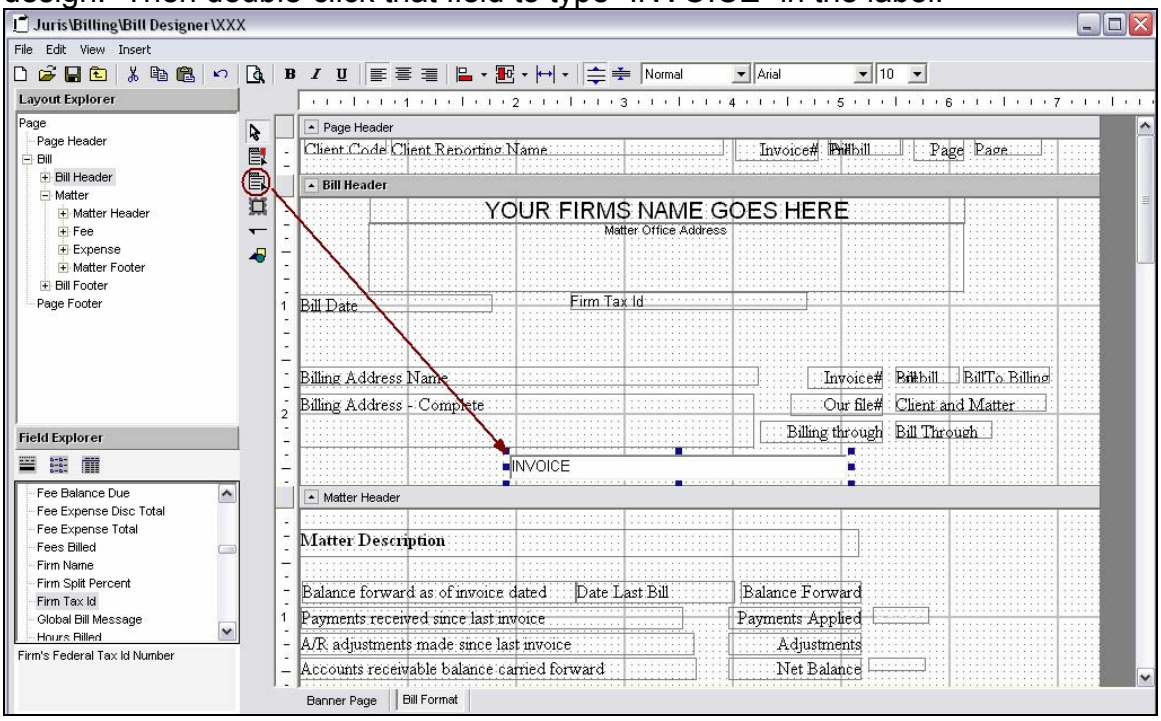


6. Add the data field *Firm Tax ID* to the Bill Header by clicking and dragging the item into the design from the field explorer as shown below:



7. Right click on the field “Firm Tax ID” and review the properties of the field.

8. To add the text “INVOICE”, click the label field button and draw a label in the designer by clicking and dragging a square in the format design. Then double-click that field to type “INVOICE” in the label.



9. Right click in the “INVOICE” field and review the properties.

10. Resize the “INVOICE” label to be the width of the format by clicking the handles and dragging the field to the correct size. Then use the center icon to center the text within the label.

11. Add a Cover Page attachment by right-clicking on the Component Tab and selecting the Cover Page attachment from the list. Notice that the tab “Cover Page” appears beside the existing components. Click on the Cover Page tab and review the canvas, which is similar to the Bill Format canvas.

12. Review the Layout Properties by selecting *File → Properties* from the Menu Bar.

13. Review the Section Properties by right clicking within any blank area of the section and selecting *Properties.*

14. Formats may be imported and exported from the *Tools* menu on the main bill designer screen.