Obtaining the Software

PCLaw is available either via download or on CD*. A download link appears in your product key email. To obtain a CD, call Sales at 800-328-2898.

* Note

PCLaw service packs and hot fixes are only available by download, and not available on CD. For assistance in downloading service packs or hot fixes, please visit the Support Center, contact your LexisNexis Certified Independent Consultant (CIC), or call LexisNexis Technical Support at 800-387-9785.

Before You Install

* Important

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

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

- Check the minimum recommended Server and Workstation system requirements and ensure your host system meets them.
- Review the PCLaw 15 Installation Guide.
- Review the Getting Started video for a preview of the installation process.
- Perform a complete backup on your PCLaw data files and documents.
- Close PCLaw and all open applications on your computer.
- Ensure that you are installing the program with administrative permissions/rights.
- Existing PCLaw Users:
Please ensure that you have completed the Verify Data Integrity process.

Please generate and compare the balances of the following reports immediately **Before and After** the PCLaw 15 installation. If they do not match, please contact customer support at 1-800-387-9785.

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

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

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**Note**

Compare the Accounts Receivable balance on the Client Ledger and Billing Fees Journal immediately **Before and After** the PCLaw 15 installation is completed as the Accounts Receivable must always match. If the Accounts Receivable do not match, please contact support at 1-800-387-9785.

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**What's New in This Release**

**Version 15.4**

There are no new features/enhancements for PCLaw 15.4.

**Version 15.3**


**Version 15.2**

There are no new features/enhancements for PCLaw 15.2.

**Version 15.1**

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

- Support for Microsoft® Office 2016
- Support for Microsoft® Windows 10
- PCLaw SQL Technology Refresh Continued
- Newfoundland & Labrador
- Changes have been made on the Provincial Tab of Systems Settings to accommodate the new rates for Real Estate and Civil Litigation transactions.
Previous Features and Enhancements

Early Adopter Release

SQL Database Foundation

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

Benefits to Attorneys and Staff

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

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

Version 15.4
The following issues have been addressed in PCLaw version 15.4:

**Billing**
- 6555541 If the *Ignore Charges Less than $0.01* option is set during billing, invoices with balances of $0.00 are not produced.
- 6616585 Prebills display payments with multiple allocations as a single payment.
- 6637095 Mass bills or Prebills do not include previously billed A/P entries.
- 6645252 When creating past due notices and the *Use second matter billing address* is enabled on some matters, PCLaw creates two copies for those matters.
- 6651907, 6653277 PCLaw sends the invoice to the email queue as expected.
- 6659036 The BillFlow Manager tool operates as expected even when there is only a partial BillFlow.

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

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

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

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

The Time Entry Advisor tool has been optimized for better performance.  

Note: The loading time of the Time Entry Advisor may vary. The first time it is executed, the system checks and processes data to display only those entries less than six months old

Balances display as expected within the Trust tab of the register.

Saving Firm receipts with GST is now available.

PCLaw provides functionality to add multiple Transaction Levy entries.

Filtering by Matter or Client in the Contact selection window displays the expected filter results.

If selected, the Hold status is retained for a General Retainer entry.

Printing from the register is available.

Accounts payable entry changes are saved as expected.

Duplicate allocations are not produced when correcting Trust to General Transfers through Matter Manager.

Selecting a Task Code with a default hold status of Never Bill, sets the entry to Never Bill.

Correcting a Trust to General Transfer that applied to an invoice no longer creates a general retainer.

When multiple payments are applied to an accounts payable transaction, changes made to any of the payments are saved as expected.

Show Parent and Sub Accounts are displayed as expected on the Income Statement, if the option is selected.
The Show on Journal check box remains selected and the entry appears on the Bank Journal.

When a user drills down on a specific account on the income statement, the details that display are only for that account.

**Matter/Matter Manager**

- The Summary tab refreshes the balances without having to close and reopen the tab.
- PCLaw provides users the ability to delete rate exceptions or create an exception for NBW with a 0.00 rate.
- Switching from one matter to another in Matter Manager is now optimized.
- Matters with uncleared Trust Balances can be closed successfully.

**Options**

- PCLaw provides users the option to delete phone calls from Phone Call Manager.
- New users can be added with Enhanced Security Enabled.

**Phone Call Manager**

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

**Register**

- Filters are persisted when printing from the register.

**Reports**

- The Fees Collected Summary is optimized for better performance.
- Reports are displayed in Currently Defined Reports.
- The Billing Realization Report is optimized for better performance.
- In Cash sets of books, the G/L Reconciliation report generates as expected.
- Vendor Ledger report displays trust checks as expected.
Manually typing a closed matter number for a client ledger produces a report for only the closed matter.

Client Costs Journal provides filtering by explanation code.

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

Verify Data Integrity indexes the Global Search Index as expected.

Billed Bank Entries are saved when the entries are marked as cleared on the bank reconciliation.

Version 15.3

The following issues have been addressed in PCLaw version 15.3:

If Matter Manager is open and a Quick Bill with new fee and disbursement charges is created, when previewing the Quick Bill, the new charges will no longer be removed from the invoice.

Editing e-mail in the Invoice E-mail Queue no longer produces an error message.

Attempting to create an invoice where the Prompt before posting and All trust transfers on one check options are enabled and then selecting No to post the bill, the trust to general transfer is recorded.

Trust Statements show correct balance if they contain checks with multiple allocations.

Bills can now be run by Non-Responsible Lawyer without error.

During the pre-billing/billing process, if you choose to print the Client Summary for multi-mattered clients, it includes all of the client details as expected.

Non-Admin users are now able to create Recurring Appointments.
<table>
<thead>
<tr>
<th>Id</th>
<th>Issue Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6591947</td>
<td>Appointment reminders now show properly at the selected time</td>
</tr>
<tr>
<td><strong>Data Entry</strong></td>
<td></td>
</tr>
<tr>
<td>6509782</td>
<td>Changing the Invoice Date on a New Accounts Payable entry does not update the Due Date.</td>
</tr>
<tr>
<td>6546919</td>
<td>Changing the value for a recurring entry produces an error message.</td>
</tr>
<tr>
<td>6551786</td>
<td>Trust Entries in a closed month cannot be voided via the Void/NSF function.</td>
</tr>
<tr>
<td>6553172</td>
<td>In the allocation section of a trust check or receipt window, if you tab into an additional allocation line (one that shows $0.00 amount and no explanation) and saving the entry, displays an error message.</td>
</tr>
<tr>
<td>6579178</td>
<td>Voiding an Accounts Payable payment no longer produces an error or duplicates the payment.</td>
</tr>
<tr>
<td>6587497</td>
<td>If Rate and Amount are set to <em>hidden</em> in advanced security, users no longer see $0.00 for the rate and amount of their time entries.</td>
</tr>
<tr>
<td><strong>Express</strong></td>
<td></td>
</tr>
<tr>
<td>6577958</td>
<td>Non-Admin users can bring up the Matter List from data entry menus in Express.</td>
</tr>
<tr>
<td><strong>Matters</strong></td>
<td></td>
</tr>
<tr>
<td>6570825</td>
<td>French characters with accents are now displayed as expected.</td>
</tr>
<tr>
<td>6570844</td>
<td>Custom tabs associated to a type of law are displayed when matters are created with that type of law.</td>
</tr>
<tr>
<td><strong>Matter Manager</strong></td>
<td></td>
</tr>
<tr>
<td>6509904</td>
<td>If Matter Manager is opened to the Main tab, the <em>Opened</em> field is displayed as active instead of the matter field.</td>
</tr>
<tr>
<td><strong>Options - Admin-Security</strong></td>
<td></td>
</tr>
<tr>
<td>6562648</td>
<td>If a user is excluded from having access to specific matters from advanced security, they do not have access to calendar entries for the matters the user is given access.</td>
</tr>
<tr>
<td><strong>Options - Lists</strong></td>
<td></td>
</tr>
<tr>
<td>6551850</td>
<td>The Event Colour for Lawyers set in Lawyers &amp; Rates does not appear on all...</td>
</tr>
</tbody>
</table>
workstations.

### Reports

6548042 If the client summary report layout is modified to include data from a custom tab, producing the client summary report fails to show the data from the associated custom tab.

6553178, 6576884 The drill-down function (to go to the source entry) on the Client Ledger does not open and produces an error message for trust transactions.

6566168 If a trust receipt is recorded with multiple matter allocations, the client accounting ledger incorrectly displays the total of the receipt for each matter as opposed to the allocation amount only.

6584685 Interest Due displays as expected on the Receivables by Client Report.

6585815 The GST journal no longer closes unexpectedly if PCLaw detects a missing vendor.

6591600 All summary sections of the Billing Fees Journal separate Hard and Soft Costs as expected.

### Tools

6584986 Deleted bank accounts no longer show in Bank Balances Summary Screen.

6585228 If a deposit slip is reprinted, the receipts on the slip are no longer duplicated.

### Tools - Bank Rec

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

### Version 15.2

The following issues have been addressed in PCLaw version 15.2:

### Billing

6508976 If the **All Trust Transfers on One Check** option is selected during mass billing, an error is produced and billing is canceled.

6537821 If a disbursement with multiple allocations is entered on the billing screen at the time of billing, the invoice produced as well as the Billing Fees Journal...
both display the allocations incorrectly.

If the **Select Charges** option is used during billing and changes are made to the billed amounts, the taxes are not updated as expected.

If client payments entered on Quick Bills are saved without a payment type, an error message is displayed when attempting to edit the payment after the invoice is produced.

If the **Select Charges** option is used while writing off charges during billing, it may cause PCLaw to freeze, thereby creating a blank billing record.

### Calendar

<table>
<thead>
<tr>
<th>ID</th>
<th>Issue Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5511071</td>
<td>Changing the <strong>Series</strong> of Recurring Appointments fails to remove the original <strong>Series</strong>.</td>
</tr>
<tr>
<td>5553456</td>
<td>Printing from the Calendar’s daily view does not include all of the appointments as expected.</td>
</tr>
</tbody>
</table>

### Data Entry

<table>
<thead>
<tr>
<th>ID</th>
<th>Issue Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6526372</td>
<td>Typing a vendor name that contains more than 32 characters in a <strong>New Payable</strong> does not automatically populate the details of the vendor.</td>
</tr>
<tr>
<td>6358921</td>
<td>Client payments that apply against multiple fee allocations for an invoice are not reflected as expected on the Client Ledger and Billing Fees Journal.</td>
</tr>
</tbody>
</table>

### People/Matters

<table>
<thead>
<tr>
<th>ID</th>
<th>Issue Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5366467</td>
<td>Using the <strong>Name Search</strong> function on the Matter Pop Up Help List does not include all matches as expected.</td>
</tr>
</tbody>
</table>

### Reports

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

Tools

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

To see the most current list of known issues for the PCLaw software, visit the PCLaw Known Issues Overview.