

PCLaw Version 9 Enhancements

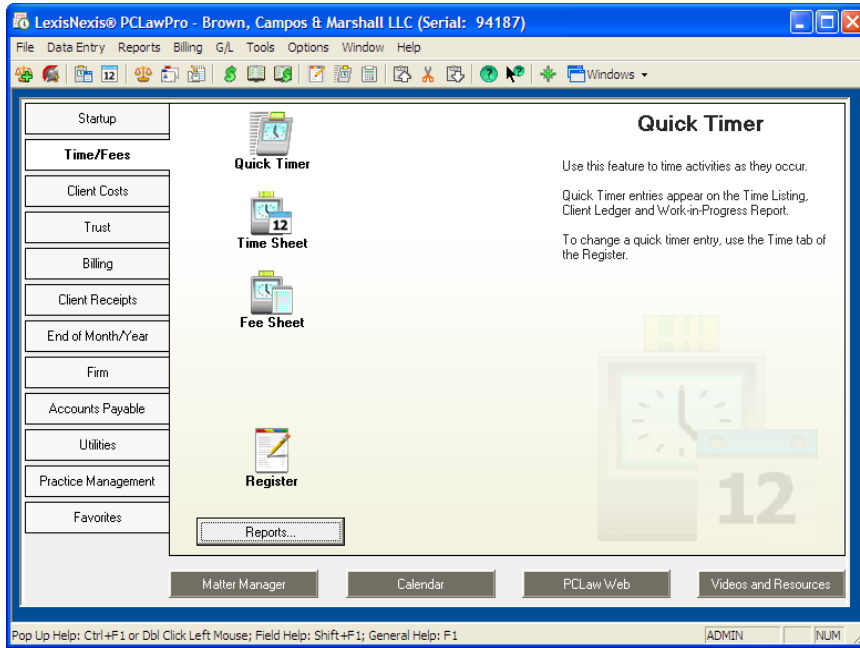
Presented by:
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PCLaw Version 9 Enhancements

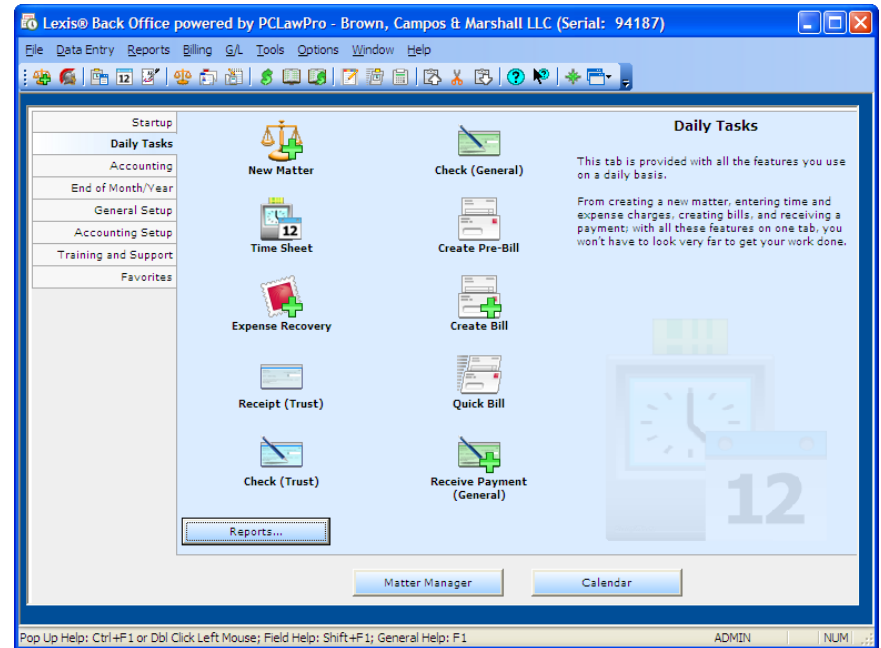
- Redesigned Quick Step
- Power Invoice Integration *
- Matter Bill Settings *
- Bill Flow Manager
- Simplified Bank Reconciliation screen
- Flexible Reporting options
- Integrated Credit Card Processing
- Online Payroll powered by ADP

* Only available in version 9.20 and above

Redesigned Screens



V8



V9

Quick Step

The screenshot displays the Lexis Back Office software interface. The title bar reads "Lexis® Back Office powered by PCLawPro - Brown, Campos & Marshall LLC (Serial: 94187)". The menu bar includes "File", "Data Entry", "Reports", "Billing", "G/L", "Tools", "Options", "Window", and "Help". The toolbar contains various icons for file operations and help. The main window is divided into a left sidebar and a main content area. The sidebar lists navigation options: "Startup", "Daily Tasks", "Accounting", "End of Month/Year", "General Setup", "Accounting Setup", "Practice Management", "Training and Support" (highlighted), and "Favorites". The main content area is titled "Training and Support" and contains several interactive icons: "Customer Support Options", "Provide Feedback", "Quick Start Guide", "Help Content", "User Manual", "Search Knowledge Base", "Product Training", "Forms Ordering", "Learn about Credit Card Processing", and "Learn about Online Payroll". A large, semi-transparent hand cursor is positioned over the "Learn about Online Payroll" icon. To the right of the icons, there is a text block under the heading "Training and Support" that explains the purpose of the section and lists several key features accessible from this area. At the bottom of the main content area, there are two buttons: "Matter Manager" and "Calendar". The status bar at the bottom of the window displays "Pop Up Help: Ctrl+F1 or Dbl Click Left Mouse; Field Help: Shift+F1; General Help: F1" on the left and "ADMIN | NUM" on the right.

Lexis® Back Office powered by PCLaw™ tries to make the program as easy as possible to learn and use, but there are a lot of complex and advanced features contained within the program.

If you can't find what you're looking for, can't figure out how to do what you need to do, or just want to offer comments and suggestions to improve the product, there are many ways to get help.

The Training and Support tab conveniently groups all the help resources in one place. Use this tab to access any of the following:

- Customer Support Options
- Provide us with Feedback
- Open the Quick Start Guide
- Access the Help Content
- Open the User Guide
- Search our Knowledge Base
- Access Product Training and Videos
- How to Order Checks and Forms
- How to get connected with PPI
- How to get connected with ADP Payroll.

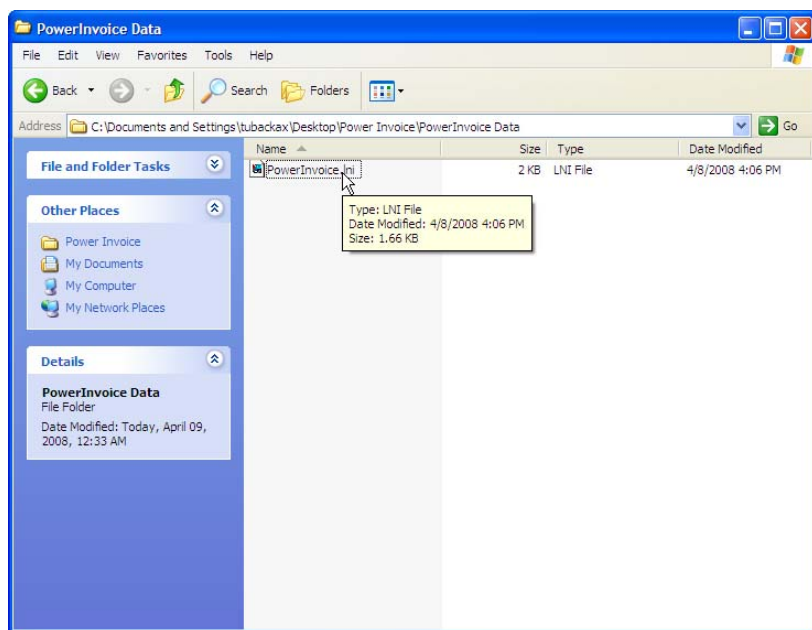
Quick Step

- New Application Launcher button opens other applications within PCLaw version 9
- Workflow oriented
- Training and support options now offered through Quick Step
- Additional column of Quick Step buttons when Help Panel is hidden

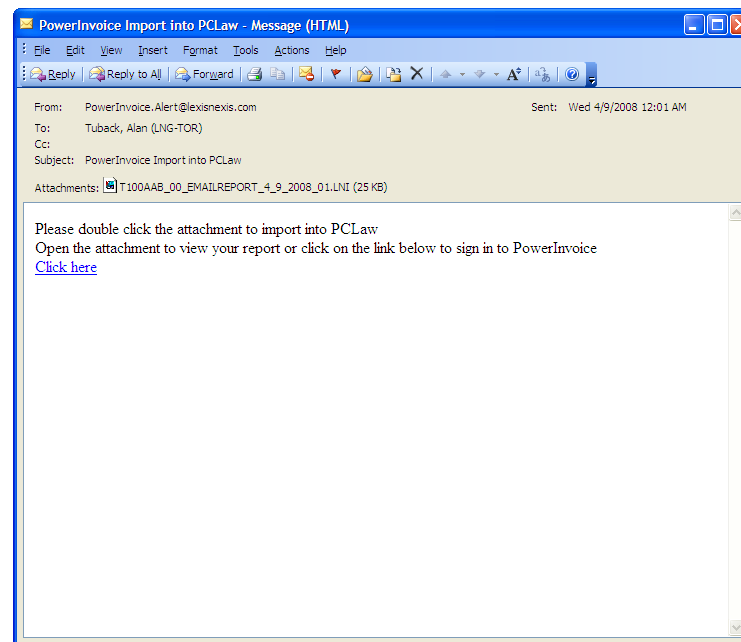
PowerInvoice Integration

- Download items into LexisNexis Import format (LNI)
- Have PowerInvoice email the LNI file on a preset schedule
- PCLaw-recognized format automatically imports the expenses
- Allocate Lexis Research fees to your clients without manually entering each charge
- Invalid entries are displayed in an expense window allowing users to make the appropriate corrections.

PowerInvoice



OR



To start the PCLaw import process, double-click the file you saved or had emailed to you (using alerts in PowerInvoice)

PowerInvoice

The screenshot displays the Lexis Back Office software interface. The main window is titled "Expense Recovery" and shows a form for "Brown, Campos & Marshall LLC" with a reference number of "X0037". The form includes fields for "To" (Expense Recovery), "Explanation", and "Spell...". Below the form is a table with columns: Date, Matter, GST, Expl. Code, Explanation, Amount, G/L Account, and Description. The table contains two rows of data for "LEXIS LEGAL SERVICES" on 3/26/2008. A pop-up window titled "Data Records Processed" is overlaid on the table, showing the following statistics:

Category	Count
Records Processed	6
Records Accepted	4
Records Skipped	0
Records Rejected	2

The pop-up window also includes "View Log" and "Close" buttons. The main window also shows an "Allocated" amount of 208.97 and various buttons like "Remove Line", "Register", "OK", "Cancel", and "Help".

Once the file is accessed, PCLaw imports the PowerInvoice transactions automatically

Matter Bill Settings

- Create and save bill settings to apply on matters
- Load defaults to matters and have ability to override various settings on individual matters
- Defaults created in System Settings
- Assign Bill Settings to one matter using Matter Manager
- Use Global Change for multiple matters
- New features include comprehensive automatic fee billing options

BillFlow Manager

BillFlow Name
Assigned To
Bill to
A/R Date

All New In Review Do Not Bill Skipped Ready To Bill Billed

Se	Status	Last Update	Assd T	Matter	Re Line	Client Name	Charges	Notes	BillFlow	Message
<input checked="" type="checkbox"/>	New	8/22/2007	RSB	03-112	NY State v. Theodore B	Boland, The	262.50		monthly	
<input checked="" type="checkbox"/>	New	8/22/2007	BEA	04-192	Peters v. Better Wardro	Garmory, S	150.00		monthly	
<input checked="" type="checkbox"/>	New	8/22/2007	RSB	03-159	Goodrich Estate	Goodrich, S	93.00		monthly	
<input checked="" type="checkbox"/>	New	8/22/2007	RSB	04-143	MegaTech - Patent	MegaTech	0.00		monthly	
<input type="checkbox"/>	New	8/22/2007	RSB	04-178	Wruble Matter	Wruble, Sop	155.00		monthly	
<input type="checkbox"/>	New	8/22/2007	RSB	04-134	City of WPB v. Hopkins	Hopkins, E	2991.92		monthly	
<input type="checkbox"/>	New	8/22/2007	RSB	03-123	Able v. State of Florida	Able, Barry	1393.20		monthly	
<input type="checkbox"/>	New	8/22/2007	RSB	02-125	Fleury v. Fleury	Fleury, Lind	18.37		monthly	
<input type="checkbox"/>	New	8/22/2007	RSB	03-124	Lee v. All County Insur	Lee, Connie	2665.00		monthly	
<input type="checkbox"/>	New	8/22/2007	RSB	02-142	Molina v. United Builder	Molina, Raf	540.32		monthly	
<input type="checkbox"/>	New	8/22/2007	RSB	03-127	Gordon v. Hammersmith	Gordon, Lar	1633.08		monthly	

Summary Time Expense Retainers Trust All

Assigned To
Status

Notes

Previous Balance	<input type="text" value="1232.11"/>	
Fees	<input type="text" value="262.50"/>	<input type="button" value="Allocation..."/>
Disbursements	<input type="text" value="0.00"/>	
Transfer From Trust	<input type="text" value="0.00"/>	Trust Balance <input type="text" value="0.00"/>
Receipts	<input type="text" value="0.00"/>	
Net Bill	<input type="text" value="1494.61"/>	

Matter: 03-1123.1 **Client:** ~00001 **Name:** Boland, Theodore
Re Line: NY State v. Theodore Boland
Unbd D: 0.00 **Unbd Hrs:** 1.50 **Unbd Fees:** 262.50
A/R: 1232.11 **Gen Rtnr:** 0.00 **Trust:** 0.00

BillFlow Manager

- Gives you more options to expedite the billing process
- Provides you with management tools to organize the entire billing process from a centralized location
- Pre-review a collection of invoices
- Assign a specific timekeeper to individual or collection of matters
- Adjust charges while still in the review stage

Simplified Bank Reconciliation

- Displays checks and receipts in easy-to-view split screens
- Balances area is reorganized to group items
- Addition of **Service Charge Button** to easily make these entries
- New **Reprint** button

Integrated Credit Card Processing

- **Process credit card payments through PPI (Payment Processing, Inc.)**
 - Industry leader in credit card processing
- **Improves cash flow**
 - Accepts credit card payments
 - Electronically transfers funds
- **Confirmation of credit card payments**
 - Expedites payments
 - Reduces administrative collection tasks

Integrated Credit Card Processing

The screenshot displays the Lexis Back Office software interface. The window title is "Lexis® Back Office powered by PCLawPro - Brown, Campos & Marshall LLC (Serial: 94187)". The menu bar includes "File", "Data Entry", "Reports", "Billing", "G/L", "Tools", "Options", "Window", and "Help". The toolbar contains various icons for file operations and navigation. On the left, a sidebar menu lists: "Startup", "Daily Tasks", "Accounting", "End of Month/Year", "General Setup", "Accounting Setup", "Training and Support", and "Favorites". The main workspace is titled "Receive Payment" and contains several icons: "New Matter", "Check (General)", "Time Sheet", "Create Pre-Bill", "Expense Recovery", "Create Bill", "Receipt (Trust)", "Quick Bill", "Check (Trust)", and "Receive Payment (General)". The "Receive Payment (General)" icon is highlighted with a yellow background and a mouse cursor. A "Reports..." button is located at the bottom left of the main workspace. At the bottom of the window, there are "Matter Manager" and "Calendar" buttons. The status bar at the bottom displays "Pop Up Help: Ctrl+F1 or Dbl Click Left Mouse; Field Help: Shift+F1; General Help: F1" and "ADMIN NUM".

Simple to process

Receive Payment

Brown, Campos & Marshall LLC Acct 1 General Operating Acc Rcpt # 00005

Received Four Hundred ***** 00/100

From Barry Able Date 8/24/2007 Amount 400.00

Explanation Spell...

Payment Selections

Matter(s) Client Invoice Interest Payment Amount Client Check #

03-1236.1 0.00 Calculate Payment Method Credit Card

Invoices G/L Allocations

Date	Inv #	Matter	Fees	Disb
7/31/2005	1	03-1236.1	1311.00	
8/22/2007	11	03-1236.1	1074.95	

Unallocated 0.00 Allocated 400.00 Bank Bal 52104.29

Matter: 03-1236.1 **Client:** 001 **Name:** Able, Barry

Re Line: Able v. State of Florida

Unbd D: 0.00 **Unbd Hrs:** 0.00 **Unbd Fees:** 0.00


A/R: 1759.20 **Gen Rtnr:** 0.00 **Trust:** 2440.00

Print... Process

Register Cancel

Help

PCLAW

 The transaction has been APPROVED by the credit card server.

Approval information:

OrderID: 490194343

ReferenceID: 1

Approval Code:

Bank Transaction ID:

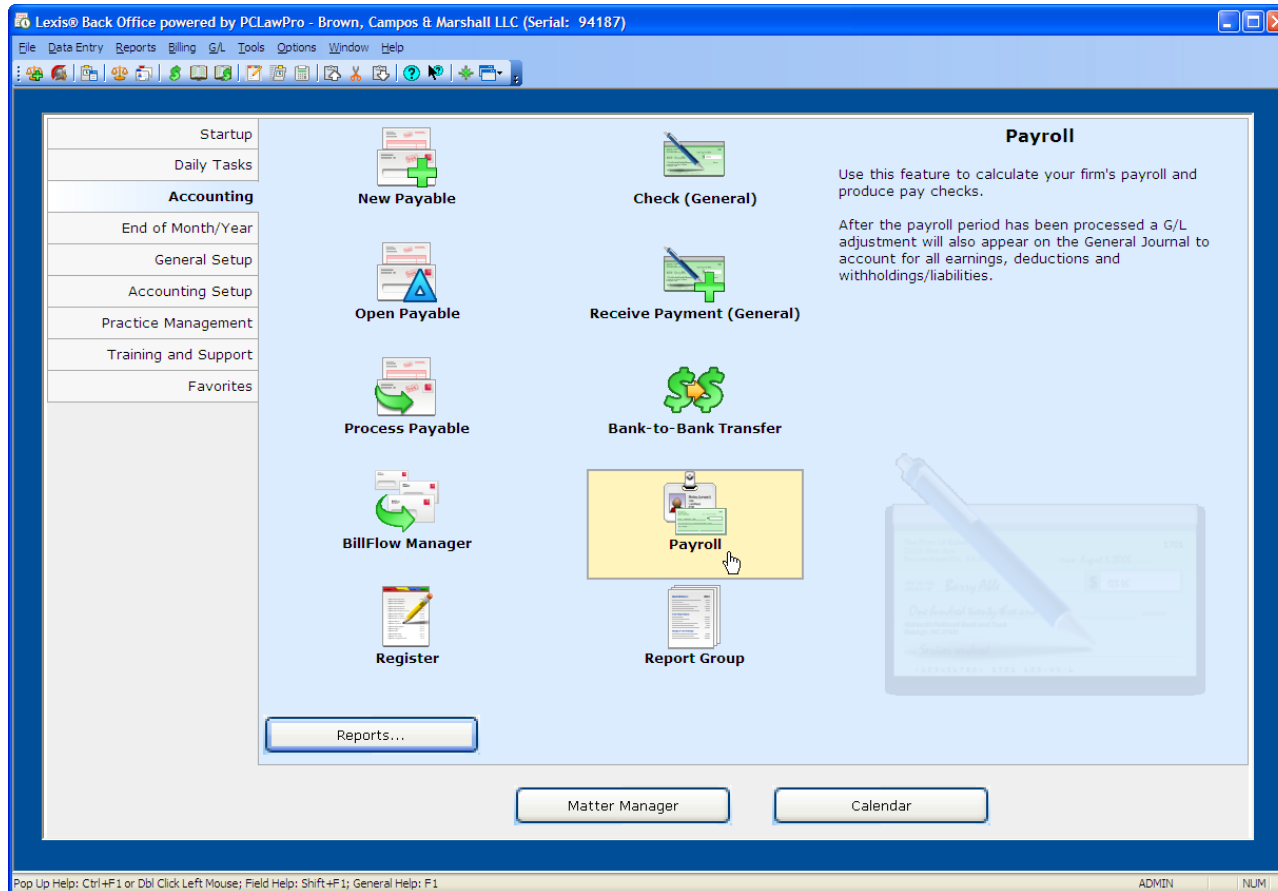
Batch ID: 55

Time Stamp: Fri Aug 24 15:58:08 2007

Credit Card: *****7003

OK

Online Payroll powered by ADP



Online Payroll Set Up

Lexis® Back Office powered by PCLawPro - Brown, Campos & Marshall LLC (Serial: 94187)

File Data Entry Reports Billing G/L Tools Options Window Help

Startup Payroll

Payroll - powered by ADP

Set Up Features

Select the payroll features you want to include in your payroll service. Click Save after you have selected your features, and then click Next to continue setting up your payroll.

Select	Features	Price	Date Started	Amount
<input checked="" type="checkbox"/>	Payroll ?	\$29.99	07/04/2007	\$29.99
<input type="checkbox"/>	e-file/e-pay ?	\$99.99		
<input checked="" type="checkbox"/>	Tipped Establishments ?	\$0.00	07/04/2007	\$0.00
Total				\$29.99

Promotion code:

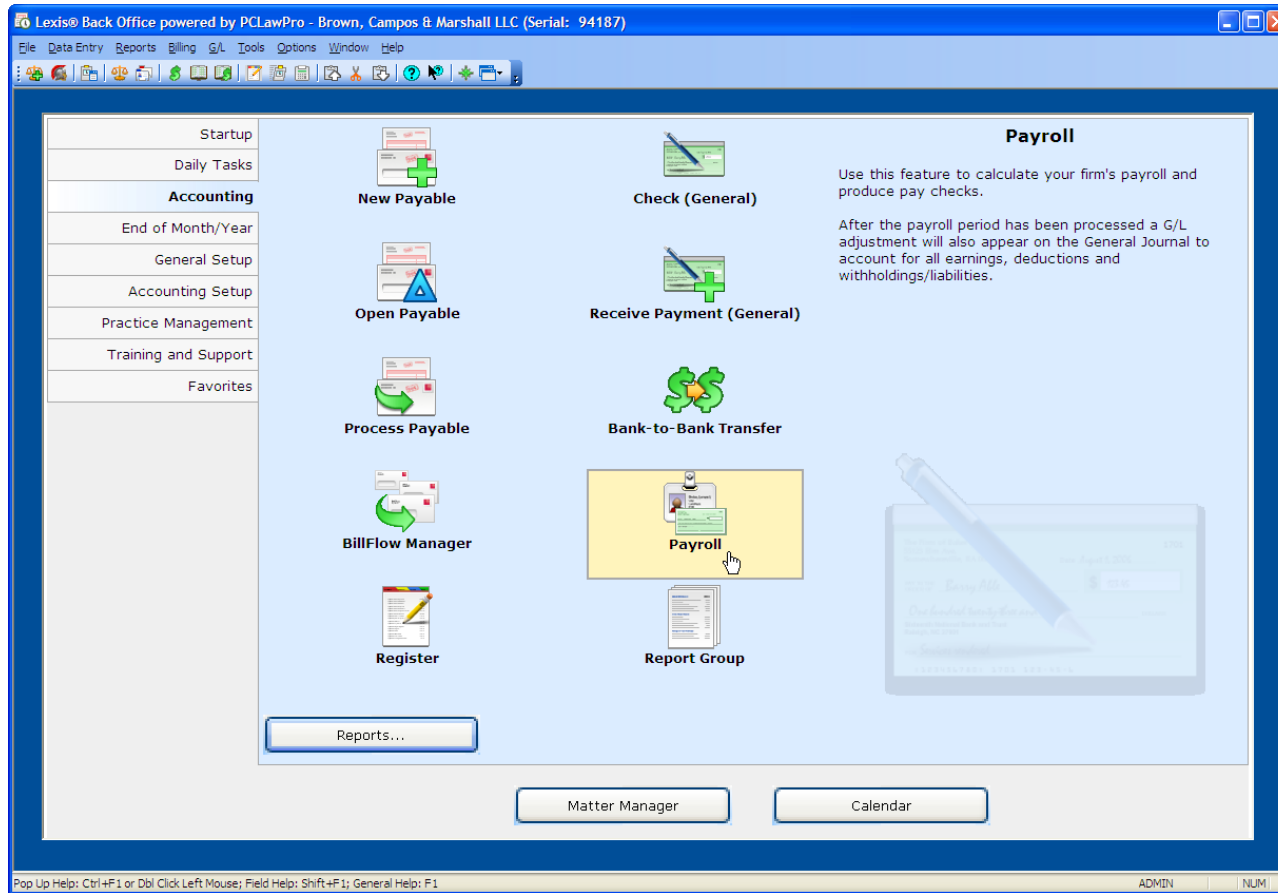
Cancel Next >

Pop Up Help: Ctrl+F1 or Dbl Click Left Mouse; Field Help: Shift+F1; General Help: F1 ADMIN NUM

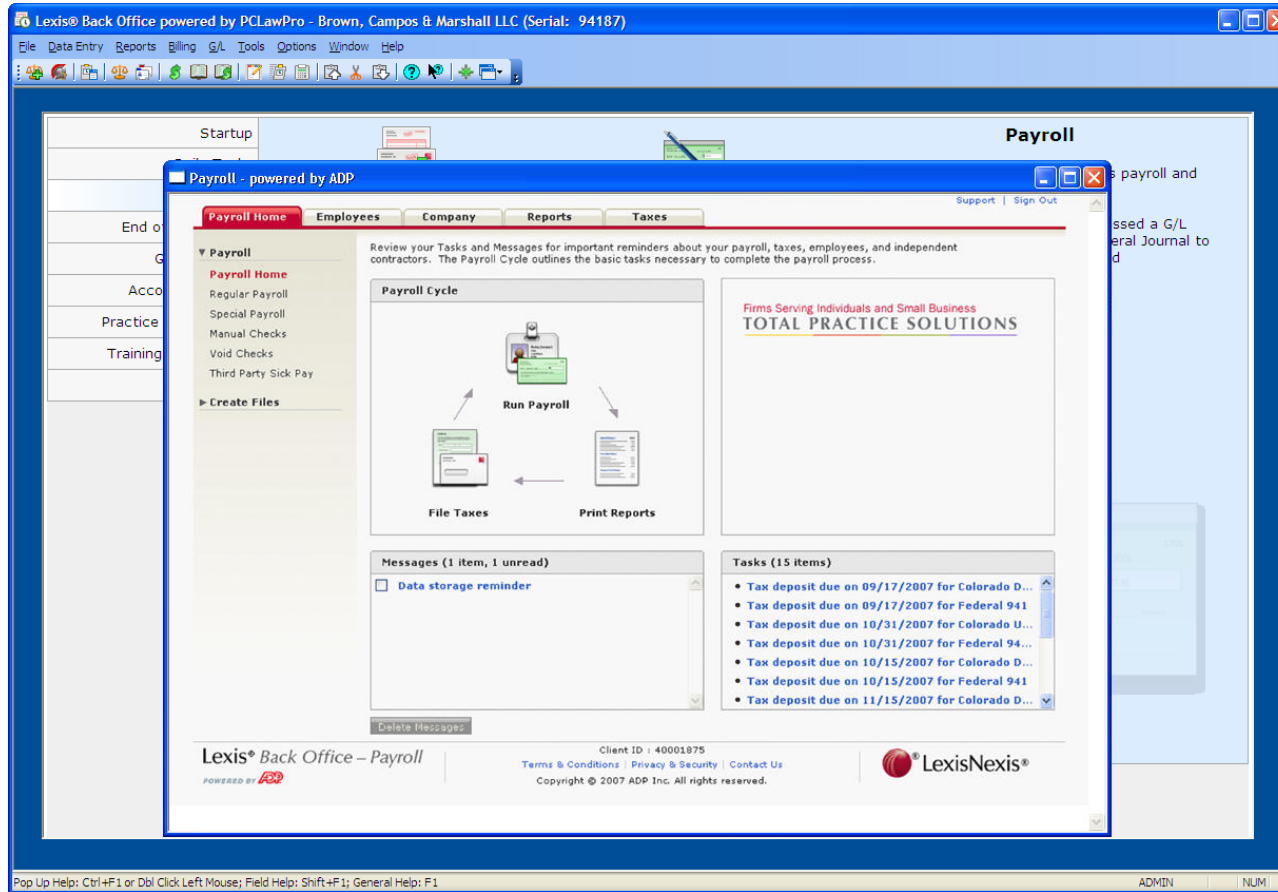
Set up of ADP Online Payroll

- Opens into a set-up wizard to enter information
- Customer receives email back with confirmation
- Call Lexis Back Office Help Desk with questions.

Open Payroll



Run Payroll and Payroll Functions



The screenshot displays the Lexis Back Office Payroll interface, powered by ADP. The main window is titled "Payroll" and contains a navigation menu with "Payroll Home", "Employees", "Company", "Reports", and "Taxes". The "Payroll Home" section includes a "Payroll Cycle" diagram showing the flow from "Run Payroll" to "File Taxes" and "Print Reports". Below this, there are sections for "Messages (1 item, 1 unread)" and "Tasks (15 items)". The "Messages" section shows a "Data storage reminder". The "Tasks" section lists several "Tax deposit due" items for various dates and jurisdictions. The interface also includes a "Support | Sign Out" link and a "Delete Messages" button. The footer of the interface displays "Lexis Back Office - Payroll", "Client ID: 40001875", "Terms & Conditions | Privacy & Security | Contact Us", and "Copyright © 2007 ADP Inc. All rights reserved.".

Startup

Payroll

Payroll - powered by ADP

Payroll Home Employees Company Reports Taxes

Support | Sign Out

Review your Tasks and Messages for important reminders about your payroll, taxes, employees, and independent contractors. The Payroll Cycle outlines the basic tasks necessary to complete the payroll process.

Payroll Cycle

Run Payroll

File Taxes Print Reports

Firms Serving Individuals and Small Business
TOTAL PRACTICE SOLUTIONS

Messages (1 item, 1 unread)

Data storage reminder

Delete Messages

Tasks (15 items)

- Tax deposit due on 09/17/2007 for Colorado D...
- Tax deposit due on 09/17/2007 for Federal 941
- Tax deposit due on 10/31/2007 for Colorado U...
- Tax deposit due on 10/31/2007 for Federal 94...
- Tax deposit due on 10/15/2007 for Colorado D...
- Tax deposit due on 10/15/2007 for Federal 941
- Tax deposit due on 11/15/2007 for Colorado D...

Lexis Back Office - Payroll

Client ID: 40001875

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LexisNexis®

Pop Up Help: Ctrl+F1 or Dbl Click Left Mouse; Field Help: Shift+F1; General Help: F1

ADMIN NUM

Payroll Benefits

- Full Integration with ADP for Payroll Services
- Information is integrated into the accounting system of Lexis Back Office
- Sign up with internet connection through Lexis Back Office

Payroll Features

- Print checks from Lexis Back Office or initiate employee direct deposit (confirm bank charges)
- Signature ready federal and state tax forms
- No need to download and integrate separate software nor tax tables
- Online reminders to file and pay taxes

Thank You

- Questions / Comments