

Release Notes for PCLaw 16.6

Contents

PCLaw support contacts.....	2
Important note for firms using Amicus Attorney.....	3
System recommendations.....	3
Download	3
What's New.....	4
Issues Addressed	7

PCLaw is a registered trademark of PCLaw | Time Matters™. Other products and services may be trademarks or registered trademarks of their respective companies.

Copyright © 2020 PCLaw | Time Matters™. All rights reserved.

Document Revision Date: 2/19/2020 2:20 PM

PCLaw 16.6

Release Date: March 2020

PCLaw support contacts

[Knowledge base, chat, and product help](#)

Technical Support

Australia	1800 999 906
Canada and United States	1-800-387-9785
New Zealand	0800 222 338

Important note for firms using Amicus Attorney

We recommend that firms currently using the Amicus to PCLaw link should not upgrade to PCLaw 16.

System recommendations

PCLaw runs best on a performant computer capable of running a line of business application on top of a modern version of the Windows operating system. Every installation of PCLaw 16 must be able to connect with an on-premise instance of SQL Server. If PCLaw and SQL Server are run on the same computer, refer to system requirements for SQL Server as published by Microsoft.

Component Recommendation

SQL Server version	<ul style="list-style-type: none"> • SQL Server 2017. Note if you do not have SQL Server already, this version is packaged with and may be installed by the PCLaw 16.6 installer. • SQL Server 2019
Operating system	<ul style="list-style-type: none"> • Windows Server 2019 • Windows Server 2016 • Windows 10 Professional
Processor speed	<ul style="list-style-type: none"> • Dual 3 GHz for a server • 2 GHz for a workstation
Memory	8 GB
Drive space	512 GB
Network	1000BASE-T Ethernet
External application versions	<ul style="list-style-type: none"> • Time Matters 16 • Office 2019 Enterprise Edition • Office 365 -- use the downloadable applications that come with the Office 365 Professional subscription
Payroll and credit card processing	<ul style="list-style-type: none"> • ADP Payroll (US only) • PPI/OpenEdge Payments

For more information on system requirements, see: [PCLaw 16 System Requirements](#).

Download

Contact technical support for a link to download the setup program.

What's New

The following features and enhancements are new in PCLaw:

Version 16.6

Updated data precheck tool. The data precheck tool now runs as part of the installation process. It has been optimized to detect critical data issues when upgrading from PCLaw 14.3 (CTREE version) to PCLaw 16.6. If it detects an upgrade from CTREE, it will run the data precheck before allowing the install of SQL Server and PCLaw 16. If the precheck tool finds critical issues, it prompts you to contact PCLaw support for assistance. If it finds no critical issues, the installation proceeds as normal. **Note, if you have multiple PCLaw databases, the built-in data precheck tool will only run on the first database. You will need to contact PCLaw support for instructions on running the data precheck tool on additional databases.**

Built-in product messaging. You can now receive tweets periodically from PCLaw | Time Matters about new PCLaw updates, technical content, training, and other important updates without having to leave PCLaw.

SQL Server compatibility. PCLaw 16.6 is now compatible with SQL Server 2017, which is now packaged with the PCLaw installer. Compatibility has also been extended to SQL Server 2019.

UI refresh and rebranding. You will notice that the user interface font, Quick Step Menu, and other screens have been updated for a cleaner, modern look. We have also changed the logos and other items in PCLaw to reflect the PCLaw | Time Matters brand.

Calendar holidays. The holiday file for the Calendar has been updated through 2026.

Version 16.5.2

No new features or enhancements.

Version 16.5.1

No new features or enhancements.

Version 16.5

Support has been added for Office 2019.

Version 16.4.1

No new features or enhancements.

Version 16.4

Civil Litigation Transaction Levies (Ontario)

Civil Litigation Levies for matters opened on or after January 1, 2018 will be charged \$100, while matters opened before January 1, 2018 will be charged \$50. The corresponding transaction levy summary report has also been updated to reflect this change.

Optimized Report Performance

Nine reports* most used by PCLaw firms now run up to 40% faster** over past PCLaw versions***. You can now produce business critical information without waiting on long processing times.

*Effected reports: Time Listing, Trust Bank Journal, Client Cost Journal, Client Trust Listing, Billing By Lawyer, Write Up Down Journal, Client Work in Progress, Time Summary, and Client Ledger.

**Benchmarking tests were performed unfiltered on the effected reports by LexisNexis Quality Assurance with a system representative to what the typical firm uses. Since environmental and software combinations are infinite, your results may vary.

***Tests were performed against PCLaw 14.2.1.

Version 16.3

No new features or enhancements.

Version 16.2.1

No new features or enhancements.

Version 16.2

Transaction Levy (Ontario). Users are no longer required to override the rate on the data entry screen for Civil Litigation transactions as PCLaw displays the rate from system settings.

Version 16.1.1

No new features or enhancements.

Version 16.1

SQL Database

PCLaw 16.1 continues to build on the enhancements released in PCLaw 16.0. It also builds on the technology refresh introduced in version 15 by migrating the core database to Microsoft SQL Server.

E-mail Past Due Notices

The Invoice/Past Due E-mail Queue (formerly Invoice E-mail Queue) provides an easy way to create and e-mail Invoices as well as Past Due Notices. E-mail templates allow you to pre-populate the body of an Invoice or Past Due e-mail without having to copy and paste or re-key the message each time. Included in the Queue are filtering, sorting and previewing options for both sent and unsent items as well as an *Invoice E-Mail Queue* and a *Past Due E-mail Queue* report.

Visual Analytics (Charts) for Billing, Payment & Account Receivable Data

Billing, Payment, and Account Receivable Data can now be viewed in charts and graphs (Pie, Line, Bar, Column) without having to look at detailed reports. Charts and graphs can be created to show variables such as Billing by Responsible Lawyer, Payments Received by Responsible Lawyer by Type of Law or Accounts Receivable by Responsible Lawyer. Charts can also be printed or saved as images for use in other programs.

Drill Down on Charts

Users can now drill down on charts to get to the underlying data for further analysis.

Resize Charts

Users can resize a chart on the screen for better viewing and consumption of the data.

Remove saved Chart Selections

Previously saved chart selections can easily be removed from the frequently used chart list.

Version 16.0

Charts (Visual Analytics)

The new "Charts" feature in PCLaw allows users to view Time and Fee Data in charts and graphs (Pie, Line, Bar, Column) without having to look at the detailed reports. Accessible from the pull-down menu at the top of PCLaw, charts and graphs can be created to show variables such as Time in Dollars for 2016 by Working Lawyer by Task Code or Time in Hours for 2016 by Responsible Lawyer by Type of Law. Several other variables and filtering options are also available to help you narrow down the scope of the data you would like to view. Charts can be printed or saved as images for use in presentations at a later time. This feature is controlled by user security and can be made available or removed from users as required.

View Productivity Reports in Excel

PCLaw Productivity Reports can now be exported to Microsoft Excel via the Excel icon located on the toolbar at the top of the report. Exporting data to Excel provides the ability to further analyze and report on client, billing and collections data within PCLaw.

Simplified Template Editor with Element Sizing and Positioning Tool

The PCLaw Template Editor opens with an overview window that provides some basic instructions about getting started. It also includes an “Element Sizing and Positioning Tool” to help you manipulate the positioning of elements on the template along with options to change the font face, font size and font style of the entire template or sections of the template with just a few steps. This new addition to template editor appears automatically upon opening a template and is also accessible under the view pull-down menu.

View Last Receipt Date in Matter Manager

The Summary tab of Matter manager now displays a “Last Receipt” date button, allowing you to have all client accounting information at your fingertips from the summary tab.

Client Work-in-Progress Report

The character limit for client name on the Client Work-in-Progress Report has been increased to 90 Characters to assist with viewing longer client names easily.

Changing G/L accounts on Paid Payable Entries (Accrual Systems)

If a Payable Entry was posted to an incorrect G/L account and subsequently paid, you can correct it. To make the correction, open the Payable entry, change the G/L account to what it should be, and then save the change. PCLaw provides this ability on Accrual systems if the month has not been closed.

Issues Addressed

The following issues have been addressed in PCLaw:

Version 16.6	
Banking - General Bank	
7448197	If batch check printing is activated and a general to trust transfer is entered, the general check is added to the batch for printing as expected.
7590683, 00268445	Using the matter button on the receive payment window works as expected to apply a payment to multiple matters.
BillFlow Manager	
7588438	The net amount of an invoice is not affected when a trust transfer is selected for a matter in the BillFlow Manager. Note, this issue occurred only if taxes were enabled in system settings.
Billing	
7463794	The filter options work correctly on the sent invoices tab of the invoice email queue.
Contact Manager	
7505547	Changing a contact and switching tabs in contact manager maintains focus on that contact record instead of reverting to the top of the contact list.
Data Entry	
7549101	The TAF entry screen no longer opens each time a receipt is entered on a matter.

7585687	G/L accounts now display in the G/L account column of the expense tab in the register.
Deposit Slips	
6110386	The number of deposit items token on the deposit slip includes payments that are recorded as certified check .
General Ledger	
7569357	The YTD values now display as expected on an Income Statement with the COMPINC template.
7572638	Backdated accounts payable entries with GST appear correctly on the G/L statement.
Reports	
6955168	When the Vendor Ledger is exported to Excel, all of the report data appear as expected.
7568123	The paid fees on the Productivity by client align correctly to the payment allocation listing.
7581046	An invalid account on the G/L account summary no longer results after saving a retainer with an extra allocation line of \$0.00.
Satellite	
5386996	When time entries imported from Satellite are billed, they no longer lose the spacing between the words of the explanation.

Version 16.5.2

Time Sheet

7581048	On the timesheet, matter/client information is populated without an excessive delay after selecting a matter and tabbing over.
---------	--

Version 16.5.1

Time Sheet

7522048	Upon selecting the OK button on the Time Sheet, PCLaw will save the entry and clear the Time Sheet as expected.
---------	---

Version 16.5

Accounts Payable

6414842	The "Total A/P" label on the general ledger report displays correctly when the report is created for the A/P G/L account.
7012301	The payment method for A/P entries is displayed correctly on the bank journal when the pay now function is used in A/P.

Banking - Bank Reconciliation

7209975	If you have 6 or more receipts on a deposit slip, the cleared receipts section of the bank reconciliation report will display correctly as expected.
---------	--

Banking - General

7177534	The receive payment function has been optimized for better performance.
---------	---

Billing

5714787	Invoices are displayed correctly if the allocation button is used at the time of billing to split the charges.
6905713	Disbursements are correctly displayed on the select charges window for Settlement Statements.
Calendar	
6935898	You can now remove lawyers from an appointment entry as expected.
7338194	On the daily reminders at startup, reminders will not be removed 30 days after the reminder date, but instead the due date.
Client Manager	
7310901	In the client manager, if you add split lawyer charges via the new matter defaults button, the changes will be saved without an error message.
Contact Manager	
7241225	The copy address button works as expected in contact manager.
Data Entry	
7177534	The receive payment function has been optimized for displaying multiple invoices.
7285195	On the release checks report, the check amounts are displayed as expected.
7411921	The autofill payee name function works correctly as expected.
7440383	The summary section on the general tab of the register displays correctly when checks are selected.
7447903	Changing the matter on a time entry also updates the client display name on the entry as expected.
Database	
7182533	An error message is no longer produced if you add a new category (Options > Lists > Categories) immediately after one is deleted.
General Ledger	
6994936	PCLaw control accounts can no longer be removed.
7281470	Exporting the general ledger to QuickBooks exports correctly as expected.
7289446	Double clicking on a bank account from the trial balance opens the general ledger report as expected.
Matter Manager	
7109004	Using the change button on the "All" tab of matter manager opens the correct data entry window for the selected entry.
7278542	In the ledger tab of matter manager, the highlighted record appears on top as expected when an entry is changed.
Matters	
7138773	An error message is no longer produced if you change the client to another client when creating a new matter.
7201614	Client categories are displayed on labels as expected.
7287859	The scroll bar works as expected if the open from button is selected when creating a new matter.
7298118	If you change the matter numbering sequence and instruct PCLaw to have the automatic numbering system start from here, the next new matter number will be as expected.

Matters - Matter Manager	
6923755	Selecting or de-selecting phone calls in the phone call manager works as expected.
6928190	Filtering case notes in matter manager by date range, works as expected.
7295798	Editing a matter description in matter manager no longer produces an error message.
Register	
6864089	Spell check in the register works as expected.
Reports	
6562854	Using Adv. Search for billing frequency on the Client Summary Report works as expected.
6973689	In the Lawyer Budgeting Report, collected column no longer includes deleted payments.
6983806	The Payable Listing has been optimized for better performance.
6989356	Time entry notes display as expected on the Time Listing Report when the notes token is added to the report.
7113175	The phone number token displays as expected when added onto the Billing Fees Journal.
7120526	Exporting the Receivables By Client Report to Excel using matter totals only produces the output correctly as expected.
7163423	The advanced search function on the Trust Ledger report, correctly displays the attributes to search on.
7179804	The Productivity By Client Report has been optimized for better performance for better performance when a date range is selected.
7182208	Printing the Time Listing Report from the register has been optimized for better performance.
7239321	Running the Missing Check Report for a specific date range will generate results for that period of time as expected.
7290940	The Sales Tax Journal has been optimized for better performance.
7345181	The Fee Allocation Summary has been optimized for better performance when a date range is selected.
7361876	A/P entries and their references are displayed correctly when the General Ledger Report is summarized.
7359358, 7374534	The 1099 Listing has been optimized for better performance.
7423820	The general bank journal displays "invalid account" when a firm receipt is saved with a \$0.00 allocation.
7459446	Running the Time Summary for a single matter generates the report as expected.
Template Editor	
7191104	The client address token correctly displays the address information in the template editor tool.
Time Entry Advisor	
6810258, 6873045	Time Entry Advisor assigns the created date for documents instead of date they were added to PCLaw.

Version 16.4.1

Banking

7415201 The bank balances function displays correctly when generated with "As of Today" as the selection.

Calendar

7412065 Users with security access to modify calendar entries can now do so as expected.

Reports

7414952 The trust balance on the client summary report is updated as expected when entries are recorded with a date prior to today's date.

Version 16.4

Accounts Payable

6927519 Processing a payable for a vendor with a partially paid opening balance no longer generates an error message.

7199353, 7256423 Changing the Invoice Date on a new payable entry also changes the due date as expected.

Billing

6052549 Billing a client with multiple matters no longer displays an erroneous message if the setting prompt for changes to billed amounts is enabled and one of the matters is set to a quoted amount.

7239907 If you print a trust transfer at the time of billing using a 3 part check, the explanation for the check prints as expected.

Calendar

6884965 The display reminders at start up show the items that are due as expected.

Client Manager

7401768 Closing clients are removed from the close client list as expected.

Data Entry

7188528 The Correct Payment and Correct Retainer functions no longer produce an error message when accessed.

Database

6891170 Matter Bill Settings are not deleted if you uncheck "Allow Bill Settings Override" in matter manager.

7155528 If you set a default rate with 3 decimal places for quantity x rate entries, it will maintain it as expected.

7174395 An error message is no longer displayed if the program is left open and idle for hours.

General Ledger

7259270 Writing off a partially paid invoice with GST accurately posts to the GST G/L as expected.

Link - API

7256618 An error message is no longer produced when opening .DOCX files in Document Manager on Windows 10, Office 2016 workstations.

Matter Manager

6998578 The focus is maintained as expected when editing a time entry in the register.

7235064	Leaving the documents tab open and idle in matter manager no longer causes the program to freeze.
6890988, 7188024	You can now mark appointments as "Done" from the events tab of matter manager as expected.
Past Due Notices	
7262045	Past Due Notices can be emailed on a matter-by-matter basis without the Past Due Email Queue being enabled.
People - Matters	
7166398	Changing the amount paid on a prior invoice in the matter opening balances window also updates the client summary as expected.
7287864, 7288643	Contacts can now be accessed as expected from the "Open From" function on the new matter window.
Printing	
7046939	Selecting Print multiple times from the Time Tab of the register prints correctly as expected.
Register	
6926143, 7209827	Editing a time entry to change the matter number will retain the lawyer as expected.
Reports	
7107360	Payments are grouped as expected when generating a client ledger with consolidated payments enabled.
7177479	The Trust Funds balance on the G/L reconciliation report is not affected by archived matters.
7181066	Write offs are displayed as expected on the Client, WIP, Billing & Collection Summary when the report is run only for the date of the write off.
7186885	Payments are displayed on the Client, WIP, Billing and Collection Summary if the report is generated to include the date of the payment.
7197820	The G/L Reconciliation Report does not show a difference when a GST remittance is entered.
7198860	The Billing Fees Journal no longer produces an error if you select all matters from the matters tab as well as print in order selected.
7287807	Retainer balances on the client accounting ledger display correctly after being applied to an invoice.
7324983	The trust listing correctly displays entries that have been entered and then had their dates backdated.
Search - Conflict	
7156994	Conflict Search includes names in Bill Memos as expected.
7248260	Conflict Search using the "exact match" function works as expected for names in A/P explanations.
Tax	
7230895	GST entered on Payables are displayed as expected.

Version 16.3

Billing	
6040371	Matters that are set to 'Bill Only Disbursements When Mass Billing' are billed as expected when mass billing is performed.
6126207	On billing templates where the aging category is present, the corresponding bill or prebill will display the amount in the correct aging category.
6873373, 7131165	Modifying an entry from the Select Charges window no longer affects the sort order of the entries.
7187556	The Mass Pre-Bill function has been optimized.
7195018	The creation of past due notices has been optimized and completes as expected.
7195122	Interest calculation on invoices factor in the grace period as expected.
Calendar	
6936396	Opening the Time tab of the Calendar has been optimized.
7007854	Changing the date of an appointment that belongs to a tickler will also update all linked events as expected.
Client Manager	
7190919	When the Name Search button on the matter popup list is clicked, the client display name column matches the client as expected.
Connection Settings	
6940323	Appointments assigned to multiple lawyers are no longer duplicated when modified.
Cost Recovery	
7180248	Using the Cost Recovery function to import time from a CSV works as expected.
Dashboard	
7173027	The autofill name lookup on the My Clients dashboard works as expected.
Data Entry	
7038051	Changing a request check that has a matter allocation will save the matter allocation as expected.
7103967	When using a template to print checks, check stubs now print the explanation as expected.
7114728	Multiple partial payments on a payable that uses the same G/L account works as expected.
7183150	When recording A/P entries, memorized explanations for A/P entries are displayed correctly.
7203184	Making a change to an expense recovery entry will retain both the G/L account and amount as expected.
Matter/Matter Manager	
6919951	The address information fields are exported as expected when using the Matter Export function to CSV.
7170768	Vendor names display as expected on the ledger tabs of both Matter Manager and Register.
7188188	On large databases, opening Matter Manager with a file that has an additional client name on the main tab, no longer terminates the program unexpectedly.
Options	

7113196	Non-admin users can produce billing statements as expected, provided they have been granted sufficient access in PCLaw security.
PCLaw Link - API	
7185879	When Amicus Attorney is exchanged with PCLaw, matters and clients are updated as expected.
Reports	
7052081	The Client Trust Listing report has been optimized for being run up to a date specified by the user.
7108344	Writing a general check to a payee who has the same name as a vendor (but who is not associated with the vendor), will not be displayed on the 1099 listing.
7182401	The vendor ledger report has been optimized.
Tools	
6933552	G/L opening balances are no longer duplicated when changes are made.
Version 16.2.1	
Banking	
7175690	The Bank Balances icon from the menu bar as well as the bank balances option from the pull down menu both display the bank balances as expected.
7181182	The loading of entries on the Bank Reconciliation Tool has been optimized.
Version 16.2	
Accounts Payable	
6962444	The GST category works as expected when you include a non-taxable expense recovery on a payable.
Bank Accounts	
6909752	Bank accounts are no longer duplicated in the bank balances window of the PCLaw toolbar.
Billing	
4988025	Recreate bills work as expected for clients with multiple matters.
6950666	BillFlow Manager no longer produces an error when billing or prebilling multiple matters.
6956230	The summary tab of Matter Manager displays unbilled hours correctly after fees are written off.
6964935	An error message is no longer generated on prebills with notes on Time Entries for users who do not have View permissions in calendar security.
6974665	Non-admin users can now generate Past Due Notices, provided they have access to the function in PCLaw security.
6993696	The amount due token used on the body of the past due email correctly displays the amount due.
6999419	The Aging column on past due notices correctly reflects the number of days outstanding.
7037219	PCLaw UK systems can generate prebills and bills for matters with quoted types without error.

7050485	On invoices, the sales tax rate for the province of Quebec (Canada) is calculated and rounded as expected.
7126419	Accounts payable entries selected on the Select Charges Screen are included on the invoice as expected.
7159329	Invoices sent to the invoice/past due e-mail queue display as expected after upgrading.
Calendar	
6947938	The calendar no longer truncates recurring appointments that have long explanations.
Connection Settings	
6761664	With the Microsoft Word connection enabled, an error no longer occurs if you open an attached document in Outlook when the name of the document contains more than 105 characters.
Contact Manager	
5076596	PCLaw no longer stops unexpectedly if it is closed when Contact Manager is open.
6978262	The Associated Matters tab in Contact Manager displays all associated matters as expected.
6998549	Creating a new matter from a contact displays the contact details correctly on both the Matter and Client Manager.
Conversion	
6992819	If signed into PCLaw as a non-admin user, converting the database to PCLaw 16 no longer generates an error message.
7039047	Write-downs display as expected on the General Ledger report after upgrading to PCLaw 16.
7119226	Additional names on matters are displayed correctly.
Dashboards	
6848975	Performance of the My Clients dashboard has been optimized for matter lookup.
Data Entry	
6752080	Time entries can accommodate a negative discount rate.
6760484	Recurring check entries allow up to 8 characters to be used in the check number field.
6840982	Modifying a time entry for a matter while Matter Manager is opened with the same matter no longer produces an error message.
6857419	Creating a recurring check from a previous entry that used the tax code "P" is displayed correctly on the check screen.
6912487	Accounts payable entries are saved and displayed correctly when sales tax on disbursements is enabled.
6919879	If you try to use a parent G/L account for an A/P entry, PCLaw alerts you before saving.
6920248	Explanations on entries are no longer duplicated if you use an explanation code and then append to it.
6930247	An error message is no longer received when Add to Retainer is selected for an overpayment on multiple matters.

6932287	Accounts payable entries in the Process Payable window are now sorted by due date.
6954188	Interest calculation works as expected when calculating from the last statement or invoice date.
6957119	The trust bank summary on a printed check displays as expected.
6964231	Account payable entries can be recorded as expected for vendors that have both a first and last name specified in their contact details.
6970966, 6982543	If you print the client ledger from the register, the printout will include the filters you have applied.
6974076	The details of trust checks are now visible when making changes through the register.
7000652, 7121542	Opening a General to Trust transfer displays the general bank account information correctly.
7002709	The Register Tabs have been optimized for better performance.
7013374	If you enter a vendor name on an account payable entry and then press the Tab key, PCLaw autopopulates the vendor number as expected.
7064966	Changing an unbilled allocation on a check that also has a billed allocation works as expected.
7074219	If time reduction tracking is turned on and you modify a time entry by reducing the amount, PCLaw will allow you to save the changes as expected.
7071875	If Show GST on Trust Check Entries is turned on and you open a trust check from the register, an error message will not result.
7081912	Transfer Expenses window displays all of the expenses as expected.
7087614	You can now print from the Time Tab of the Register without having to exit the Register after selecting print.
7098938	Entering a retainer for \$0.00 no longer produces an error message.
7129663	Removing one allocation of a multi-mattered Trust-to-General Transfer no longer results in an error message.
7203184	Making a change to an expense recovery entry will retain both the G/L account and amount as expected.
General Ledger	
6943679	The general ledger account for fees displays as expected if the Use Draw and Equity Accounts setting is enabled for a timekeeper who previously had billed fees in PCLaw.
6978605	Inactive accounts are displayed on the Trial Balance as expected.
7034308	The adjustment report generated by PCLaw upon running the year-end close function displays correctly.
7091190	Checks with a check number of "ADJ" display on the General Ledger report as expected.
Matter/Matter Manager	
6839029	The explanation for sales tax on invoices entered on the opening balances tab of Matter Manager are correctly displayed on the client ledger.
6923694	The process of creating and saving new matters has been optimized.

6951025	If there are no outstanding trust items on a matter, you can archive it as expected.
6951771	The matter number sequence works correctly if you attempt to create a matter, cancel the process, and then make changes to an existing matter in Matter Manager.
6961457	Changing a Trust to General transaction from the Ledger tab of Matter Manager no longer produces an error message.
6970530	Split Lawyer charges can now be saved without error when new matters are created.
6970963	Adjusting the past due interest rate in Matter Manager no longer causes PCLaw to stop unexpectedly.
7013381	Archived matter numbers are prevented from accidental reuse on new matters.
7043320	The client ledger printout from the Ledger tab in Matter Manager matches the printout from Reports > Client ledger.
7082062	Interest Due on the Summary Tab of Matter Manager displays as expected after upgrading to PCLaw 16.
7090998	Memos longer than 2,910 characters that are entered on the Summary tab of Matter Manager are no longer truncated.
7099143	When adding a contact with a role through matter manager, the role is saved as expected.
Options List	
6832775	If the Charge Sales Tax at a different Rate setting is enabled in system settings, the billing process will calculate taxes as expected.
6891307	Safe Custody Manager has been optimized for adding packets.
PCLaw Link - API	
6713722, 6731412, 6940743	If a non-admin user is listed under PCLaw connection settings, an error message no longer results when the test link option in Time Matters is run.
Reports	
6892182, 6933017	The Client Summary report correctly displays values after automatic disbursements are billed.
6913352, 6946501	PCLaw no longer stops unexpectedly when the Client WIP, Billing and Collection Summary is generated and summarized by Matter Introducing Lawyer.
6947879	Opening a general to trust transfer entry by drilling down from the client ledger works as expected.
6982700	The Client Accounting Ledger displays correctly if there are previous balances and previous payments entered on the opening balances tab of the matter.
6989453, 7037138, 7028137	Filtering the client accounting ledger displays the balance forward as expected.
7014653	The Receivables by Client report displays the interest amount as expected.
7015891	If the client trust ledger report is generated by client and filtered by 'Matter with balances greater than or equal to', the report will display matters as expected.

7038273	The fees collected on the Lawyer WIP, Billing Collection Summary, and Fees Collected Summary reflect the same.
7049153	The list of clients report works as expected when the sort by responsible lawyer filter is used.
7075091	The Final Trust Payments Cash Book displays the decimal places correctly without truncating.
7076617	The filter for include contingency matters on the WIP report works as expected.
7097927	Filtering the Time Listing report produces the report as expected.
Tools	
6836284, 6874253	If a matter does not have an assigned lawyer listed in Matter Manager, you can successfully enter and save unpaid invoices with sales tax in the Matter Opening Balances.
6939175	Court information details from the Settings tab of Matter Manager are displayed as expected if used on templates.
Version 16.1.1	
Vendors	
6964231	An error message is no longer displayed when a payable entry is recorded using a vendor whose contact details has both the First and Last Name populated.
Version 16.1	
Accounts Payable	
6792991	Searching for a vendor on the Process Payable window has been optimized to prevent PCLaw from freezing and terminating unexpectedly.
Billing	
6000551	If you specify interest to be calculated based on a future date for a Past Due Notice, it will calculate to the date specified and not the current date.
6499411	The Settlement Statement no longer displays a GST amount when there are no entries on the report.
6777342	The description for Transaction Levy transactions are displayed correctly on bills and prebills.
6806784	The pre-billing function has been optimized for better performance.
6819642	If Show Full Amount of Each Charge on Invoice is specified on split matters, the charges are displayed on the invoices as expected.
6842743	If pre-bills are set to sort by responsible lawyer, they will be printed in the same order as expected.
6885102, 6885092	Disbursements that use explanation codes for Special Fees appear on invoices as expected.
6899639	When clients with multiple matters are billed with new invoice for each client selected, if there are no charge entries on the file, they will not appear on the invoice.
Calendar	
5577794	On a recurring calendar event, if you select specify that PCLaw should make an adjustment if date falls on a weekend, the adjustment will be made as specified.

6713749	If you enable the filter option on the calendar to show both completed and uncompleted To Do's, the filter will display the entries as expected.
6835138	Removing a recurring To Do no longer causes PCLaw to become unresponsive.
Conflict	
6623793	If a conflict search returns a large number of results, it no longer causes PCLaw to stop unexpectedly.
Contact Manager	
6751124	Using the search field in contact manager no longer causes PCLaw to stop unexpectedly.
Data Entry	
5061877	Opening receipts where an invoice was paid and the overpayment was refunded to the client no longer shows the client refund as an unallocated amount.
5854771	If you enter a client payment that results in an overpayment to retainer and you change the amount of the receipt, the amount added to retainer will also adjust as expected.
6832411	The tabs on the register has been optimized for better performance.
6876073	Memorized transactions use the correct explanation as expected.
Matter/Matter Manager	
6824246	Saving notes on matters through matter manager has been optimized
6826668	Matter Manager has been optimized for better performance when matters with a large number of time entries and time entry notes are accessed.
6845860	If Auto Disbursement as a percentage of fees is part of a matter bill setting, upon adding the bill setting to a matter, an error message will not be produced.
6891103	The opposing Lawyer token displays the name as expected on case labels
6891194	An error message no longer appears if you create a new matter immediately after closing an existing matter
Options	
6827490	If users have restrictions in Advanced Security for Time Entries and the Time Entry Advisor function is active, PCLaw no longer freezes when users exit the software.
6831244	Changing a Trust bank Account name in Options > Lists> Bank Accounts also changes the name in the General Ledger as expected.
Reports	
5698622	The Billing Realization report now displays adjustments as expected for requested bills that have a discount applied.
6858629	If the Minimum Retainer field is added to the client summary report layout, upon generating the client summary report, the minimum retainer balance set in matter manager will be displayed as expected.
6882626	Removing a matter opening balance also removed it from the client ledger report as expected.
6909779	The G/L Reconciliation Report displays disbursements correctly on Modified Cash Systems where Separate Hard and Client Soft Costs is enabled.
6914323	The client summary report no longer displays a negative A/R balance after a general retainer is entered.
Tools	

6812441	Receipts with a payment method of Direct Deposit now display in the Bank Reconciliation if Deposit Slips is on.
6911309	The Bank Reconciliation Report correctly displays the matters for the bank entries.
Version 16.0	
Accounts Payable	
5657007	If The GST amount was changed when a payable was entered, upon opening the entry in the register you will see the balances as expected.
6712499, 6721821	The processing of payable entries has been optimized for better performance.
6784757	Processing a partial payment on a payable where GST was calculated no longer displays an error message.
Billing	
5765400	If you include previously recorded charges onto a quickbill, the client ledger will no longer show a line item with a zero dollar fee.
6517818	If you undo an invoice in which a payment from trust applied and then redo the invoice via quickbill using the previously used invoice number, the trust transfer payment screen will correctly display the invoice number specified at the time of billing.
6448711	Exceeding estimated Fee prompt message is generated for all Matters exceeding Estimate Limit during mass bill.
6691379	Creating bill with unrecorded disbursements has been optimized.
6730927	Writing off disbursements no longer enters a negative Fee entry on the client ledger.
6739164	Electronic billing file is successfully created for split matters.
6830454, 6831117	On matters set up for task-based billing, an error message is no longer generated when pre-billing or billing time entries with the Task Code "BW".
6818647	GST on disbursements is calculated based on the total of all disbursements as expected.
Contact Manager	
6801652	The export clients from Contact Manager to .CSV no longer produces an error message.
Data Entry	
6117617	If you change the Tax code on a check to "P" and then change the amount of the check, the explanation of the check allocations will no longer be affected.
6161820	Changes are now saved as expected when delay post is used.
6644192	If a retainer was recorded using a G/L other than the default G/L account, PCLaw will allow you to change the entry without an error message.
6697159	The Summary Section on the check screen is updated as expected when a check is printed.
6731424	When correcting a time entry in the register, if you change the matter number, the client name, lawyer and rate will adjust as expected based on the matter chosen.
6743587	The process Payable window no longer displays duplicate payables.
6772499	Temp files created when opening and changing entries are cleaned up when you close the entry.
6778543, 6810515	If you create a general check and select "Include in A/P" along with a "Z" code, you can save the entry without error.

6800504, 6821043	Entering Expense recoveries will be saved if they are allocated to the Client Disbursement Recovery G/L Account.
6825357	Entering a Firm receipt with a "Z" code no longer produces an error message
G/L	
6738047	The G/L Statement closing balance will match the Trust Bank Journal and Client Trust Ledger when they are generated for "Totals Only".
6796173	Exporting the General Ledger Report to QuickBooks no longer produces an error message.
Matter/Matter Manager	
5928913	Changes to the billing address of a multi-mattered client applies to other matters if you select apply changes to matters for this client.
6509167	Re-closing a matter using a previously closed matter number will no longer lose the auto numbering sequence for closed matter numbers.
6703289	If you create a matter and choose the copy address from list, you will no longer receive an error message when saving the file.
6721300	Closing a matter where a trust to general transfer has occurred and the trust transaction is reconciled produces a warning that there is a trust bank item along with an uncleared general bank item.
6726168	Editing Time Entries through Matter Manager (Time Tab) has been optimized for better performance.
6732386, 6800501	The settings for Split Lawyer charges is saved as expected in Matter Manager.
6800690	The Matter Export function includes data from custom tabs associated to the matter.
Misc	
6687970	Bank entries with more than 800 allocations will no longer cause PCLaw to crash.
Reports	
5888040	The Client Accounting Ledger no longer shows a negative retainer if the receipts were entered on the opening balances tab for the matter.
6666777	"Matters with Balances greater than or equal to" option works when a sort method is used under the Matters tab.
6715759	All Trust Banks are shown for Matters with over 10 bank accounts on the Client Trust Listing.
Tools	
6713601	Lawyer Overview List matches the Lawyer Overview screen.
6779831	The Reprint bank report function on the bank reconciliation tool has been optimized.
6824058	If you change the amount paid on an invoice that was entered in the opening balances tab of Matter manager, the A/R reports will match as expected.