About this guide

This guide provides a list of tasks for maintaining PCLaw® Practice Management Software. If you need additional information, refer to the PCLaw Support Center.
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How to use this guide

Use the basic procedures covered in this document to perform the following administrative tasks:

- Backup and restore
- Security setup
- Setting security preferences
- PCLaw application updates
- System settings and setup
- Connection settings and setup
- Workstation settings and setup
- Lawyer and rates setup
- Identifying the types of law
- Setting up explanation
- Setting up task codes
- Setting up department codes
- Setting up templates
- Establishing bank accounts
- Establishing general ledger accounts
- Vendor setup
- PCLaw mobility setup

For additional information and/or details, including interface elements and more advanced tasks/procedures, please refer to the PCLaw online help and/or the PCLaw Support Center.
Intended audience

This guide is intended to be used by persons performing basic PCLaw administrative tasks used to set up and/or maintain the PCLaw software. It also provide PCLaw administrative personnel with procedures and other information used to setup and maintain the PCLaw® Mobility service.

Note

This guide is limited to performing the basic setup and commonly performed maintenance tasks for the PCLaw application.

For additional details, including interface elements and more advanced tasks, please refer to the PCLaw online help and/or the PCLaw Support Center.
Login

Use the following procedure to access the PCLaw application.

1. Launch the PCLaw application.
   
The PCLaw login screen opens.

2. Verify and/or enter an appropriate User Name.

3. In the Password field, enter your password.

4. Click OK.
   
The Welcome to PCLaw screen opens.
5. Click Close to close the Welcome to PCLaw screen.

The PCLaw Quick Step screen displays.
Backup and restore data

PCLaw allows administrative personnel to backup and restore data. The Backup Data feature stores accounting and calendar information within a single file in a location specified by the user. The Restore Data feature is used to restore a PCLaw backup onto a current set of PCLaw books. Refer to the PCLaw Software Support Center for additional information.

Backup data

1. Open the PCLaw application.

   **Note**

   If you are not the only user in PCLaw, all other users must exit PCLaw before you can backup your data.

2. Go to **Options > Administrator > Lock System**. The Lock PCLaw System screen displays.

3. Click **Lock**.

   A PCLaw priority message is sent to all users to exit the application.

4. Go to **File > Backup/Restore > Backup Data**.

   A PCLaw advisory screen is displayed.
5. Click **Yes** on the PCLaw Advisory screen to continue.

A PCLaw message screen opens.

6. Click **OK** to continue.

The PCLaw Archive - Export File screen opens with and associated file name is provided.

7. Click **Save** to save the file to the provided file name or enter a new file name if warranted.

The PCLaw Archive Manager advisory screen opens.

8. Click **Yes** to continue.

The Backup Progress screen opens.

9. Click **Close** to continue.

**Note**

It is recommended that you make several copies of your backup data and that you retain the backups for the previous five to six backup files.
Restore data

1. Open the PCLaw application.

   **Note**
   
   If you are not the only user in PCLaw, all other users must exit the application before you can backup your data.

2. Go to **Options > Administrator > Lock System**.
   
The Lock PCLaw System window opens.

3. Click **Lock**.

4. Go to **File > Backup/Restore > Restore Data**.
   
   A PCLaw advisory screen is displayed.
5. Click Yes to continue.

A PCLaw application closure advisory screen opens.

6. Click OK to continue.

The PCLaw application closes and the PCLaw Archive Manager screen opens.

7. In the File name box, use the drop-down arrow to enter the name of the backup file and click Open.

The PCLaw Archive Manager Information screen opens.

8. Click Yes to continue.

The restore confirmation screen opens.
9. Click Yes.

The Import Progress screen opens, followed by the PCLaw Archive Manager screen display.

10. Click Yes to continue.

The Import Progress screen displays.

11. After the import process is complete, the PCLaw application opens.

12. Enter your login and password accordingly.

**Note**

The message One of the index files needs to be rebuilt or Index file successfully rebuilt may display on your screen after logging in. Click OK to close the error message window. You might also get the message Index File Rebuilt. Both of these messages are normal after a restore and may appear multiple times, Click OK until the messages no longer appears.
Security settings and setup

Security settings are used to determine what features within the PCLaw application users have access to. Additionally, security settings are used to:

- create users
- add users to a group
- grant and/or restrict user rights to Matters, accounts, time and fees, calendar functions, and other PCLaw applications features

See the PCLaw Support Center for additional PCLaw security functions.

Create a new user in PCLaw

1. Open the PCLaw application.
2. Go to Options > Administrator > Security.

The PCLaw Security Setup screen opens.

3. Click the New button on the Users tab.

The User Detail window opens.
4. Enter the user's login name in the **User Name** box.
5. Enter the user description in the **Description** box (optional).
6. Enter the user's e-mail address in the **E-mail** box (optional).
7. Enter a password for the user in the **Password** box (optional).
8. Enter the same password in the **Confirm Password** box.
9. Select other options as applicable.
10. Click **OK** to add the user and return to the Security Setup window.

**Note**

All new users added must be a member of a group.
Add a user to a group

1. Go to Options > Administrator > Security.

The PCLaw Security Setup screen opens.

2. Select the user to add to a group from the User list.

3. In the Available Groups box, select the group that the user will be assigned to.

4. Click Add to move the group to the Member of box.

5. Click OK to save the changes.
PCLaw advanced security settings

PCLaw advanced security settings are used to provide and/or restrict users to PCLaw functions such as Matters, the Matter Manager, bank accounts, Time/Fees, and the Calendar. To grant and/or restrict users, perform the following procedure.

1. Go to **Options > Administrator > Security**.

   The PCLaw Security Setup screen opens.

2. Select the user to add to a group from the **User** list.

3. Click the **Advanced** button.

   The Advanced Security Settings screen opens.
4. Click the appropriate security settings tab (i.e., Matters, Bank Accounts, etc.).
5. Select all applicable access and/or restrictions to be applied to the user and click **OK**. The Security Setup screen is displayed.

6. Click **OK** to save all user changes.
Matter access and setup for users

To allow a user to access Matter information, complete the following procedure.

1. Go to Options > Administrator > Security.

   The PCLaw Security Setup screen opens.

2. Select the user from the User list.
3. Click the **Advanced** button.

The Advanced Security Settings screen opens.
4. Click the **Matters** security settings tab.

5. Select all applicable access and/or restrictions to be applied to the user and click **OK**.

   The Security Setup screen is displayed.

6. Click **OK** to close the window if there are no other security setup changes that need to be made.
Bank account access and setup for users

To allow and/or restrict a user's access to the firm’s bank accounts, complete the following procedure.

1. Go to **Options > Administrator > Security**.

   The PCLaw Security Setup screen opens.

2. Select the user from the **User** list.
3. Click the **Advanced** button.

The Advanced Security Settings screen opens.
4. Click the **Bank Accounts** security settings tab.
5. Select the **Enable Access to General Bank Accounts** to allow access to the firm's bank accounts.

6. Click **OK** to close the window if there are no other security setup changes that need to be made.

   The Security Setup screen displays.

7. Click **OK** to close the window.
Time/Fees access and setup for users

To apply Time/Fees access and/or restrictions for a user, complete the following procedure.

1. Go to Options > Administrator > Security.

   The PCLaw Security Setup screen opens.

2. Select the user from the User list.
3. Click the **Advanced** button.

The Advanced Security Settings screen opens.
4. Click the **Time/Fees** security settings tab.
5. Select the **Restrict Access to** check box to restrict access to lawyer/other time and fee data entry information as applicable.

6. Select the **Restrict Deletion** check box to restrict users from deleting entries and/or lawyers.

7. Use the drop-down menu arrows to select all applicable access and/or restrictions, and select the **Required** check boxes where appropriate for remaining fields (i.e., Date, Matter, etc.).

8. Click **OK**.

   The Security Setup screen is displayed.

9. Click **OK** to close the window if there are no other security setup changes that need to be made.
Calendar access and setup for users

To allow and/or restrict a user’s access to certain calendars, complete the following procedure.

1. Go to **Options > Administrator > Security**.

   The PCLaw Security Setup screen opens.

2. Select the user from the **User** list.
3. Click the **Advanced** button.

The Advanced Security Settings screen opens.
4. Click the **Calendar** security settings tab.
5. Select the appropriate timekeeper and click the Add button to allow access to each applicable box (View, Modify, Private). This identifies who has access to who's Calendar and information.

6. Select the **Include Inactive Lawyers** check box if Calendars for inactive lawyers will be maintained.

7. Click **OK**.

   The Security Setup screen is displayed.

8. If there are no other security setup changes that need to be made, click **OK** to close the window.
Matter, client, and contact manager permissions

To allow and/or restrict a user’s access to certain aspects of the Matter, Client, and Contact Managers, complete the following procedure.

1. Go to **Options > Administrator > Security**.

   The PCLaw Security Setup screen opens.

2. Select the user from the **User** list.
3. Click the **Advanced** button.

The Advanced Security Settings screen opens.
4. Click the **Permissions** security settings tab.
5. Use the drop down arrow for each applicable box (i.e., Lawyer Information, Address Information, Bill Settings, etc.) to provide the level of access granted to the user for each box.

6. Select the **Allow User to Add Custom Tabs** check box if the user can add tabs when using the Matter, Client, and/or Contact Managers.

7. Select the **Allow User to Remove Custom Tabs** check box if the user can remove tabs when using the Matter, Client, and/or Contact Managers.

8. Click **OK** to close the window if there are no other security setup changes that need to be made.
   
   The Security Setup screen displays.

9. Click **OK**.
Other tab security restrictions

To allow and/or restrict other user restrictions, complete the following procedure.

1. Go to Options > Administrator > Security.

   The PCLaw Security Setup screen opens.

2. Select the user from the User list.
3. Click the **Advanced** button.

   The Advanced Security Settings screen opens.
4. Click the **Other** security settings tab.
5. (Optional:) Select the **Allow 'Restrict Negative Trust Balance' Override** check box if the user can override negative Trust account balances.

6. (Optional:) Select the **Hide Matter Balances** check box if the user is not allowed to view the account details for matters.

7. Click **OK** to close the window if there are no other security setup changes that need to be made. The Security Setup screen displays.

8. Click **OK**.
View user rights

To determine the rights and privileges that a user has access to/restricted from accessing, perform the following procedure:

1. Go to Options > Administrator > Security.
   The PCLaw Security Setup screen opens.

2. Select the user from the User list.
3. Click **Show User Rights**.

The PCLaw Menu Maintenance screen opens.

4. Select each menu item (File, Data Entry, Reports, etc.) on the screen to see the options that the user has access to or has been restricted from accessing.

5. Close the PCLaw Menu Maintenance window.

6. Click **OK** to close the Security Setup screen.
User restrictions

Certain restrictions can be applied to each user with access to the PCLaw application. User restrictions can be applied to areas of the application such as allowing users to access certain aspects of the Matter Manager, bank accounts, performing Time/Fee entries, and some Calendar functions. To restrict users to these and other functions within PCLaw, perform the following procedure.

1. Go to Options > Administrator > Security.

   The PCLaw Security Setup screen opens.

2. Select the user from the User list.
3. Click the **Advanced** button.

   The Advanced Security Settings screen opens.
4. Click the appropriate security settings tab (i.e., Matter, Bank Accounts, etc.).

5. Use the drop-down arrows and/or check boxes to apply restrictions to the user as applicable and click OK. The Security Setup screen is displayed.

6. Click OK to save all user changes.
Remove a user from a group

To remove a user from a group within the PCLaw application, perform the following procedure.

1. Go to **Options > Administrator > Security**.

   The PCLaw Security Setup screen opens.

2. Select the user from the **User** list.
3. Select the group from the **Member of:** box.

4. Click **Remove** to move the group to the **Available Groups** box.

5. Click **OK** to save the changes.

A PCLaw advisory message is displayed stating that all users must be a member of a group.

6. Click **OK** to continue.
Tip

Since all users must be a member of a group, either add the user to another group or remove that user from the PCLaw application.
Remove a user from PCLaw

To remove a user from the PCLaw application, perform the following procedure.

1. Go to **Options > Administrator > Security**.
   
The PCLaw Security Setup screen opens.

2. Select the user from the **User** list.
3. Click the **Remove** button.

   The user is deleted.

4. Click **OK** to close the Security Setup screen.
Change user password

To change a user password, complete the following procedure.

1. Go to **Options > Change Password**.
   
The Change Password screen displays.

2. Select the user from the **User** list.

3. Select the **Set Password** button.
   
The Set Password screen displays.
4. In the **Password** box, type the new password.

5. In the **Confirm Password** box, type the same password.

   **Tip**

   The new password cannot be the same as one of the previous five passwords used.

6. Click **OK** to save the changes.

   A PCLaw Advisory screen displays if the password change is successful.

   ![Password successfully changed](image)

7. Click **OK**.

   An additional PCLaw Advisory screen is displayed.

   ![Do you want to email password to user](image)

8. Click **Yes** to e-mail the updated password to the user, otherwise, click **No**.

   The Security Setup screen displays.

9. Click **OK** to close the screen.
Setting up groups

All users in PCLaw must be assigned to a group. Therefore, a group must be created before adding users. A group can have any number of users. To create a new group, complete the following procedure.

1. Go to Options > Administrator > Security.

   The PCLaw Security Setup screen opens.

   ![Security Setup screen](image)

2. Click the Groups tab.
3. Click **New**.

The Group Detail screen opens.

4. Enter a name in the **Group Name** field.

5. Enter a description of the group in the **Description** field.

6. Click **OK**.

   The Security Setup window opens and displays the new group.

7. Click **OK** to close the Security Setup window.
Credit card security

PCLaw allows you to receive payments from clients using their credit card. The LexisNexis Credit Card Processing Application (LNCCPA) security module is a requirement in configuring user Credit Card security.

1. Open the PCLaw application.

2. Go to Options > Administrator > Credit Card Security to open the PCLaw Credit Card Login window.

![PCLaw® - Credit Card Login](image)

**Tip**

The LexisNexis Card Processing application program must be installed. If the LexisNexis Card Processing application is not installed, an advisory message is displayed.

3. (Optional:) To install the program, click Yes and complete the steps outlined in the LexisNexis Card Processing wizard.

4. (Optional:) Complete the steps outlined to create a Credit Card administrative user account.

5. In the User Name field, type your LNCCPA Admin User ID.

6. In the Password field, type your LNCCPA Admin Password.

**Tip**

Contact PCLaw Support at 800-387-9785 if you do not know your LNCCPA password.

7. Click OK to open the PCLaw Credit Card User List window.
8. Click one of the following:

- New User- Creates new users for the LNCCPA
- Set Password- Resets the user's LNCCPA password
- Properties- Configures additional options for LNCCPA users
- Delete User- Removes a user from the LNCCPA

9. Click **Close** after completing your task.
Create a new credit card user

To create a new user for the LexisNexis Credit Card Processing Application program, complete the following steps.

1. Open the PCLaw application.
2. Go to Options > Administrator > Credit Card Security to open the PCLaw Credit Card Login window.

3. In the User Name field, type your LNCCPA Admin User ID.
4. In the Password field, type your LNCCPA Admin Password.

Tip

Contact PCLaw Support at 800-387-9785 if you do not know your LNCCPA password.

5. Click OK to open the PCLaw Credit Card User List window.
6. Click the **New User** button.
   
   The PCLaw Add Credit Card User window opens.

![Add Credit Card User Window](attachment:image)

7. In the **User Name** field, type the user's name.

8. In the **Description** field, type a description.

9. (Optional:) Select the **Allow Access to administrative functions** check box to allow this user access.

10. In the **Password** field, type a password that meets the strong password requirements.

11. In the **Retype Password** field, retype the password.

12. Click **OK**.
   
   The PCLaw Credit Card User List window opens displaying the added user.

13. Click **Close** after completing your task.
Reset a credit card user's password

To reset/change a user's password for the LexisNexis Credit Card Processing Application program, complete the following steps.

1. Open the PCLaw application.

2. Go to Options > Administrator > Credit Card Security to open the PCLaw Credit Card Login window.

3. In the User Name field, type your LNCCPA Admin User ID.

4. In the Password field, type your LNCCPA Admin Password.

Tip

Contact PCLaw Support at 800-387-9785 if you do not know your LNCCPA password.

5. Click OK to open the PCLaw Credit Card User List window.
6. Select the user in the list who's password will be reset.

7. Click the **Set Password** button.

The PCLaw Set Password for Credit Card User window opens.

8. In the **New Password** field, type the new password that meets the strong password requirements.

9. In the **Retype New** field, re-type the new password.

10. Click **OK**. The PCLaw Credit Card User List window is displayed.

11. Click **Close** after completing your task.
Configure a credit card user's account settings

To configure a user's account for the LexisNexis Credit Card Processing Application program, complete the following steps.

1. Open the PCLaw application.

2. Go to Options > Administrator > Credit Card Security to open the PCLaw Credit Card Login window.

3. In the User Name field, type your LNCCPA Admin User ID.

4. In the Password field, type your LNCCPA Admin Password.

   Tip
   
   Contact PCLaw Support at 800-387-9785 if you do not know your LNCCPA password.

5. Click OK to open the PCLaw Credit Card User List window.
6. Select the user in the list who's account settings will be configured.

7. Click the **Properties** button.

   The PCLaw Credit Card User Properties window opens.

   ![PCLaw Credit Card User Properties window](image)

8. Select the appropriate check boxes that applies to the user.

9. Click **OK**.

   The PCLaw Credit Card User List window is displayed.

10. Click **Close** after completing your task.
Delete a credit card user account

To delete a user’s account from the LexisNexis Credit Card Processing Application program, complete the following steps.

1. Open the PCLaw application.
2. Go to Options > Administrator > Credit Card Security to open the PCLaw Credit Card Login window.

   ![PCLaw® - Credit Card Login](image)

   You need to login into the Lexis Credit Card Processing application to continue.

   **Login Information**

   - **User Name:**
   - **Password:**

   **Note:** This is an administrative operation which always requires a login.

   - [ ] Change Password
   - [OK] [Cancel]

3. In the **User Name** field, type your LNCCPA Admin User ID.
4. In the **Password** field, type your LNCCPA Admin Password.

   **Tip**

   Contact PCLaw Support at 800-387-9785 if you do not know your LNCCPA password.

5. Click **OK** to open the PCLaw Credit Card User List window.
6. Select the user in the list who's account will be deleted.
7. Click the **Delete User** button.

   The Delete Confirmation screen opens.

   ![Delete Confirmation Screen]

   **Are you sure you want to delete “Mobility User”?**
   
   **Note:** The user name cannot be reused in the future.

   ![Yes and No Buttons]

8. Click **Yes** to delete the user.
9. Click **Close** after completing your task.
Security preferences

Enabling Advanced Security via the Security Preferences screen allows the system administrators to:

- set the number of days after which passwords expire
- email users after setting their password
- disable a user and to force a user to change their password
- lock out users after a set number of failed logins
- disable user accounts

Security preferences setup

To enable the PCLaw Advanced Security feature, complete the following procedure.

1. Open the PCLaw application.
2. Go to Options > Administrator > Security Preferences.
   
The PCLaw Security Preferences screen opens.

3. Select the Enable Advanced Security check box and click OK to continue.
4. Accept or enter the appropriated number of days for password expiration.
Dashboard security and restrictions

Users without adequate permissions for a particular dashboard will not see that dashboard's tab as an available selection on the dashboards menu. Similarly, it will not appear on the Quick Step interface.

Users that have been restricted from all dashboards will not have dashboard access, and will see the Quick Step interface instead, without the dashboard tabs. These users will not have 'Dashboards' as an available selection from the Options menu.

Similarly, users who have restricted access to data entry and reports in PCLaw will have limited access within the dashboards, if available. Your current user security settings for PCLaw allows flow through the dashboards.

Dashboard restrictions and setup

To set user dashboard restrictions:

1. Go to Options > Administrator > Security.

The Security Setup screen displays.

2. Select/highlight the user to be restricted from the User list.

3. Click the Groups tab.

The Groups tab screen displays.
4. In the **Group** box, select the Group from the list that will not be allowed access to a specified billing/accounting function.

5. Double-click on the selected billing/accounting function in the **Allow Access To** column to move it to the **Do Not Allow Access To** column.

**Tip**

Items moved to the **Do Not Allow Access To column** restricts a user from using that item.

6. Click **OK** to complete the task.

**Note**

Users without Group security for a particular dashboard will not see that dashboard's tab/button as an available selection on the dashboards menu.
Note

Users that have been restricted from all dashboards will not have dashboard access on the Quick Step, and will only see the Quick Step interface. These users will not have 'Dashboards' as an available selection from the Options menu.
PCLaw application updates

The PCLaw application can be updated manually or on an automatic basis.

PCLaw automatic updates

Complete the following procedure to setup PCLaw for automatic updates.

1. Open the PCLaw application and go to **Options > Administrator > Update Settings**.
   
   The Update Settings screen opens.

2. Select a preference from the list to identify the PCLaw frequency at which the application should check for updates.

3. Click **OK**.
PCLaw manual updates

To manually update PCLaw, perform the following:

1. Open the PCLaw application.

2. Go to Help > Live Update From Web.

   The PCLaw Live Update screen opens.

3. Click the Start Check for Updates link.

   The Updates Available screen displays.
Note

Your browser may need to install an ActiveX control to allow the update engine to search your version of PCLaw. At the top of the web page are installation instructions.

4. The web based update engine will check your currently installed version of PCLaw.

5. Perform one of the following:
   a. If there are updates available, follow the instructions provided on the PCLaw Live Update screen.
      - or -
   b. If there are no updates (No updates available at this time), the web page will state there are none to download. Close the web browser to finish.
System settings and setup

It is important to ensure that all system settings for your firm be established and initially configured. System settings must be the established for the following areas:

- firm
- data entry
- banking
- taxes
- matters
- billing
- past due/interest
- memorized transactions
- check patterns
- front office
- research
- client intake
- other

Additional information pertaining to system setting is available on the PCLaw Support Center website.
System settings for the firm

To enter the system settings data for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to Options > System Settings.

   The System Settings screen opens.

3. Click the Firm tab.

4. Enter the firm’s data in all fields (i.e., Firm Name, Address, City, etc.) as appropriate.

5. Click OK.

   The System Settings screen closes.
Data entry system settings

To complete the Data Entry system settings data for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.

   The System Settings screen opens.

3. Select the **Data Entry** tab.

   The Data Entry tab displays.
4. Select all check boxes that will apply to your firm's data entry process(es).

5. Click OK.

The System Settings screen closes.
Banking system settings

To complete the Banking system settings for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to Options > System Settings.

   The System Settings screen opens.

3. Select the Banking tab.

   The Banking tab displays.
4. Select all check boxes that will apply to your firm's banking process.

5. (Optional:) If necessary, see the Banking Quick Check Layout and/or the Banking MICR Font Setting procedure(s) to complete that portion of the Bank system setting setup procedure.

6. Click OK.
   
The System Settings screen closes.
Banking quick check layout

To complete the Banking Quick Check layout for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.

   The System Settings screen opens.

3. Select the **Banking** tab.

   The Banking tab displays.
4. Click the Quick Check Layout button. The Check Layout window opens.

5. Click the Top button. The Check Layout - Top Stub screen opens.
6. Enter the appropriate data for each field/category on the Check Layout - Top Stub screen.

7. Click **Close** when done.

8. Click the **Body** button.

The Check Layout - Body screen opens.

9. Enter the appropriate data for each field/category on the Check Layout - Body screen.

10. Click **Close**.

11. Click the **Bottom** button.

The Check Layout - Bottom Stub screen opens.
12. Enter the appropriate data for each field/category on the Check Layout - Bottom screen.

13. Click **Close** when done.

   The Check Layout screen displays.

14. Click **OK**.

   The Check Layout screen closes.

15. Click **OK** to close the System Settings screen.
Banking MICR font settings

To complete the setup for Banking MICR font settings for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.

   The System Settings screen opens.

3. Select the **Banking** tab.

   The Banking tab displays.
4. Select the **MICR Font Setting** button.

   The MICR Font Setting window opens.

5. Enter settings as appropriate for your firm.

6. Click **OK** to close the MICR Font Setting window.

   The System Settings window is displayed.
7. Click **OK** to close the System Settings window.
System settings for taxes

To complete the setup for taxes associated with your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.

   The System Settings screen opens.

3. Select the **Tax** tab.

   The Tax tab displays.
4. Enter the appropriate data for each field/category on the Tax screen.

5. Click **OK**.
   
   The Tax screen closes.

6. Click **OK** to close the System Settings screen.
Matter system settings

To complete Matter settings for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to Options > System Settings.

   The System Settings screen opens.

3. Select the Matter tab.

   The Matter tab displays.
4. Enter and/or select the appropriate data for each field/category on the Matter screen.

5. Click the **New Matter Settings** button.
   The New Matter Display screen opens.
6. Select the fields from the Hidden or Shown columns.

7. Use the Add or Remove button to move fields between the columns.

8. Click OK when done.

   The New Matter Display Fields screen closes.

9. Click OK to close the System Settings screen.
Billing system settings

To complete Billing settings for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.
   The System Settings screen opens.

3. Select the **Billing** tab.
   The Billing tab displays.
4. Enter and/or select the appropriate data and/or check boxes for each field/category on the Billing screen.

5. Click the **Browse** button to enter an appropriate output path if an alternate location is desired.

6. Click **OK** when done.

   The Browse for Folder screen closes.

7. Click **OK** to close the System Settings screen.
Past due/interest system settings

To complete and setup the Past Due/Interest settings for your firm, complete the following procedure.

1. Open the PCLaw application.
2. Go to Options > System Settings.
   - The System Settings screen opens.
3. Select the Past Due/Interest tab.
   - The Past Due/Interest tab displays.
4. Enter and/or select the appropriate data and/or check boxes for each field/category on the Past Due/Interest screen.

5. Click the **Customize** button.

   The Set Phrases screen opens.

6. Select a phrase from the list or click the **Add** button.
The Add New Phrase screen opens.

7. Enter an appropriate past due phrase and a description of the phrase that will be used for desired past due notices.

8. Click OK when done.

The Set Phrases screen re-opens.

9. Click OK to close the Set Phrases screen.

The System Settings screen is displayed.

10. Click OK to close the System Settings screen.
Change a past due notice phrase

To change a phrase used by the firm to reflect past due notices, complete the following procedure.

1. Open the PCLaw application.
2. Go to **Options > System Settings**.

   The System Settings screen opens.

3. Select the **Past Due/Interest** tab.

   The Past Due/Interest tab displays.
4. Click the **Customize** button.

The Set Phrases screen opens.

5. Select a phrase from the list and click the **Change** button.

The Change Phrase screen opens.
6. In the **Description** field, change the phrase as warranted and enter a description that will be used for desired past due notices.

7. Click **OK** when done.

   The Set Phrases screen re-opens.

8. Click **OK** to close the Set Phrases screen.

   The System Settings screen is displayed.

9. Click **OK** to close the System Settings screen.
Remove a past due notice phrase

To change a phrase used by the firm to reflect past due notices, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.
   
   The System Settings screen opens.

3. Select the **Past Due/Interest** tab.
   
   The Past Due/Interest tab displays.
4. Click the **Customize** button.

The Set Phrases screen opens.

5. Select a phrase from the list and click the **Remove** button.

The Remove Phrase confirmation message screen opens.
6. Click **Yes** to confirm the deletion of the selected phrase.

   The Set Phrase screen is displayed.

7. Click **OK** to close the Set Phrases screen.

   The System Settings screens is displayed.

8. Click **OK** to close the System Settings screen.
Memorized transactions system settings

To complete the setup for the Memorized Transactions settings for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.

   The System Settings screen opens.

3. Select the **Memorized Transactions** tab.

   The Memorized Transactions tab displays.
4. Select the appropriate check boxes for each field/category on the Memorized Transactions screen.

5. Click the **General** button under the **Edit Payee** box to enter, change, or remove a selected payee from the Memorized Payees list.

   The General Bank Memorized Payees screen opens.
6. Close the window when done using the **Close** box in the upper right hand corner of the screen. 

The System Settings screen is re-opened.

7. Click the **Trust** button under the **Edit Payee** box to enter, change, or remove a selected payee from the Trust Bank Memorized Payees list.

The Trust Bank Memorized Payees screen opens.

8. Close the window when done using the **Close** box in the upper right hand corner of the screen.

The System Settings screen is re-opened.

9. Click **OK** when done.
The System Settings screen opens.

10. Click **OK** to close the System Settings screen.
Check pattern system settings

To complete and setup the Check Pattern settings for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.

   The System Settings screen opens.

3. Select the **Check Pattern** tab.

   The Check Pattern tab displays.
4. Click the **Defaults** button to accept the current check patterns, or click **Change** for each applicable check type to change the pattern.

5. Click **OK** when done.

   The System Settings screen closes.
Change a check pattern

To change a Check Pattern for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.

The System Settings screen opens.

3. Select the **Check Pattern** tab.

The Check Pattern tab displays.
4. Click the **Change** button for the check type (i.e., General Check, Trust Receipt, other) to change the pattern.

The Pattern Change screen opens.
5. Click the **Foreground Colour Change** or **Background Colour Change** button to change that associated color.

The selected color is displayed in the Pattern Selections and the Preview areas of the Pattern Change screen.

6. Click **OK** when done.

The System Settings screen displays.

7. Click **OK**.

The System Settings screen closes.
Front office system settings

To complete and setup the Front Office settings for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > System Settings**.

   The System Settings screen opens.

3. Select the **Front Office** tab.

   The Front Office tab displays.
4. Select the appropriate check boxes for your firm's Front Office settings.

5. Click the Browse button for the Matter/Client and Contact boxes to select the appropriate default letter documents.

6. Click OK when done.

   The System Settings screen closes.
Research system settings

To activate the LexisNexis Research function:

1. Go to Options > System Settings > Research Tab.

   The Research screen displays.

   ![System Settings Screen]

   2. Select **Activate LexisNexis® Research**.

      A PCLaw advisory screen displays stating that the changes will take effect after the system has been restarted.

   3. Click **OK** to continue.
Client intake

Client Intake is an automated process that lets you open a new client file by using a template intake form to set up a client contact record and to create a new client matter.

1. Go to Options > System Settings > Client Intake on the main menu.
   The Client Intake administration/setup screen displays.

   ![Client Intake Administration/Setup Screen](image)

   - **Client Intake Form**: C:\PCLaw Data\DATA\PCLawDocs\Precedents\clientintake
   - **Email Body**
     - Thank you for your enquiry into the services of Just-D-Place Law. Please fill out the attached form and return it to:
   - **View Documents Relating to Client Intake**
   - **OK** button
   - **Cancel** button
   - **Help** button

2. Click **Browse** or **Open** to view and display the Client Intake Form, Engagement, or Non-Engagement form/letter.

3. In the **E-mail Body** section of the Systems Settings screen, review and/or edit the text for the body of the e-mail.

4. Click **Browse** at the bottom of the screen to view any documents relating to the Client Intake.

5. Click **OK** on the System Settings screen to complete the process.
Other system settings setup

To setup system setting for the Other tab, complete the following procedure.

1. Open the PCLaw application.
2. Go to Options > System Settings.

   The System Settings screen opens.

3. Select the Other tab.

   The Front Office tab displays.
4. Select the appropriate check boxes and/or fields to complete the **Other** tab settings for your firm.

5. Use the appropriate drop-down menu arrows to enter data into all applicable fields.

6. Click **OK** when done.

   The System Settings screen closes.
Connection settings

Connection settings are used to control connections to software such as Windows® Explorer, Internet Explorer®, Microsoft® Word, and/or Microsoft® Outlook.

Configure remote client server settings

To configure the Remote Client server, complete the following procedure.

1. Open the PCLaw application.

2. Go to Options > Connection Settings. The Connection Settings screen opens.

3. Select the Use This set of Books when Connecting with Other Programs checkbox.
4. Select the **Store Password** check box and enter your administrative password.

5. Select all other applicable checkboxes.

6. Click **Configure Remote Client Server Settings** and click **OK**.

The PCLaw Remote Client Server Configuration Utility screen displays.
7. Enter and complete the directory information to be used by remote clients.

**Note**

The directory path must be entered as UNC only (e.g., \lngrdumfsp002\Shared\PCLaw Data\DATA\REMOTE).

8. Click **Next** to continue.

The PCLaw Link Service Log on As screen displays.

9. Enter your PCLaw log in and password information, and click **OK** to continue.

A PCLaw advisory log displays.

**Note**

Be sure to supply your domain\computer name followed by your user name (e.g., legal\Hammonrx).

10. Click **OK** to continue.
11. (Optional:) Repeat the last step for all applicable services.

   The PCLaw Remote Client Server Configuration Utility Action Complete screen displays.

12. Click Done.
Outlook connection settings

Via the Outlook tab, users are able to:

- establish the method of information exchange between PCLaw and Outlook
- enable the exchange of appointments and contacts
- track e-mails.

Use the following procedure to establish the Outlook connection settings.

1. Open the PCLaw application.
2. Go to **Options > Connection Settings**.
   The Connection Settings screen opens.

3. Click the **Outlook** tab.
   The Outlook Connection Settings screen displays.
4. Select the appropriate check boxes and click **OK** to continue.

A PCLaw Advisory screen displays.

5. Click **OK** on the Start Outlook message screen.

The Login to PCLaw screen displays if the PCLaw application is not already opened.
Note

Screens that are displayed after entering your login and password information are based on the options selected in previous steps above, and will vary accordingly.

6. (Optional:) Enter the Administrative password and click **OK**.

The PCLaw Outlook Connection screen displays.

7. Click **OK** to continue.

The Lawyer Selection screen opens.
8. Select a timekeeper from the list and click **OK**.

A PCLaw advisory screen opens.

9. Click **OK**.

The Select Folder screen opens.
10. Select the folder that will be used to exchange Contact information and click **OK**.

A PCLaw advisory screen opens.

11. Select the folder that will be used to exchange Task information and click **OK**.

A PCLaw Advisory screen is displayed.

12. Click **OK** to restart the Microsoft® Outlook® application.
Internet Explorer connection settings

Via the Internet Explorer tab, users are able to:

- establish the method of information exchange
- enable the exchange of appointments and contacts
- track e-mails

Use the following procedure to establish the Internet Explorer connection settings.

1. Open the PCLaw application.
2. Go to **Options > Connection Settings**.
   
The Connection Settings screen opens.

3. Click the **Internet Explorer** tab.
   
The Internet Explorer Connection Settings screen opens.
4. Complete all fields as applicable and click **OK**.
Workstation settings and setup

Workstation setup is used to control PCLaw's data entry, calendar, colour, and miscellaneous settings on a particular workstation. The procedure to setup each setting is described in the following procedures.

Workstation data entry setup

To setup how data is entered for an individual workstation using the Data Entry tab, complete the following procedure.

1. Open the PCLaw application.
2. Go to **Options > Workstation Settings**.

   The Workstation Settings window opens with the Data Entry tab selected by default.

3. Select the check boxes for the data entry functions applicable for your firm and click **OK**.

   The Workstation Settings window closes.
Calendar setup for individual workstations

To setup the Calendar for an individual workstation using the Calendar tab, complete the following procedure.

1. Open the PCLaw application.

2. Go to **Options > Workstation Settings**.

   The Workstation Settings window opens.

3. Click the **Calendar** tab.

   The Calendar window is displayed.
4. Use the **Create Calendar Items For** drop-down arrow to select the lawyer that the Calendar items will be created for.

5. Click the **Appt Display** button.

   The Appointment Display Fields screen opens.
6. Select the fields in the Hidden column that must be moved to the Shown column for display on the Calendar and click OK.

7. Select the check boxes for the options to be used by your firm and click OK.

The Workstation Settings window closes.
Miscellaneous settings and setup options for individual workstations

To complete the setup for the miscellaneous settings on an individual workstation using the Other tab, complete the following procedure.

1. Open the PCLaw application.
2. Go to **Options > Workstation Settings.**
   
The Workstation Settings window opens.

3. Click the **Other** tab.
   
The Other tab window is displayed.
4. Select the check boxes for the options to be used by your firm and click **OK**.

The Workstation Settings window closes.
Changing the color settings for individual workstations

To complete the setup for the miscellaneous settings on an individual workstation using the Other tab, complete the following procedure.

1. Open the PCLaw application.

2. Go to Options > Workstation Settings.

The Workstation Settings window opens.

3. Click the Color tab.

The Color tab window is displayed.
4. Click the associated **Change** button to change an item (i.e., Matter Manager) on the screen. The Color screen opens.
5. Select the applicable color and click **OK**.

   The Color tab screen re-opens.

6. (Optional): To reset default colors, click the **Defaults** button.

7. Click **OK**.

   The Workstation Settings - Color window closes.
Document settings and setup for individual workstations

To complete the setup for the miscellaneous settings on an individual workstation using the Other tab, complete the following procedure.

1. Open the PCLaw application.

2. Go to Options > Workstation Settings.

   The Workstation Settings window opens.

3. Click the Documents tab.

   The Documents tab window is displayed.
4. Select the check boxes for the options to be used by your firm.

5. (Optional): Click the **Start** button to start the Documents Indexer.

6. Click **OK**.

   The Workstation Settings window closes.
Lawyers and rates

To track the time for each timekeeper in your firm using the Lawyers and Rates function, complete the following procedure.

Add a new lawyer

1. Open the PCLaw application.

2. Click General Setup on the PCLaw Quick Step screen.

3. Click the Lawyers and Rates icon.

The Lawyers and Rates screen opens.

4. Click the Add button.

The Add New Lawyer window opens with the General tab selected by default.
5. Enter the new lawyer's nickname, initials, and name in the corresponding fields.

6. Complete all remaining/applicable fields in the window and select the date the rates will take effect for the firm/new lawyer.

7. Select the rate that will be used for the new lawyer and enter it in the **Amount** column.

8. Click **OK**.

A PCLaw Advisory screen is displayed.
9. (Optional:) Click **Yes** to set partner accounts. Otherwise, click **No** to continue.

If you selected **Yes** to setting partner accounts, the Accounting tab displays.

10. (Optional:) Select the **Use Draw and Equity Accounts** checkbox.

11. Click **OK**.

   The Lawyers and Rates screen reopens.

12. Click **OK** to close the screen.
Change lawyer information

To change information for a lawyer in the firm, complete the following procedure.

1. Open the PCLaw application.

2. Click **General Setup** on the PCLaw Quick Step screen.

3. Click the **Lawyers and Rates** icon.

   The Lawyers and Rates screen opens.

4. Select the lawyer from the list whose information must be changed and click **Change**.

   The Change Lawyer Information screen opens.
5. Change the lawyer information as applicable and click **OK**.

The Lawyers and Rates screen re-opens displaying the updated information.

6. Click **OK** to close the Lawyers and Rates window.
Remove a lawyer

To remove/delete a lawyer in the firm from the database, complete the following procedure.

1. Open the PCLaw application.
2. Click **General Setup** on the PCLaw Quick Step screen.
3. Click the **Lawyers and Rates** icon.

   The Lawyers and Rates screen opens.

4. Select the lawyer from the list whose information will be removed/deleted and click **Remove**.

   A deletion warning message is displayed.
5. Click the **Yes** button to continue. The Lawyers and Rates screen re-opens.

6. Click **OK** to close the Lawyers and Rates window.
Change a lawyer's accounting information

To change the accounting information for a lawyer in the firm, complete the following procedure.

1. Open the PCLaw application.
2. Click **General Setup** on the PCLaw Quick Step screen.
3. Click the **Lawyers and Rates** icon.
   
The Lawyers and Rates screen opens.

4. Select the lawyer from the list whose accounting information must be changed and click **Change**.
   The Change Lawyer Information screen opens.
5. Click the **Accounting** tab.

The Change Lawyer Information Accounting tab window opens.
6. Change the lawyer’s accounting information as applicable and click **OK**.
   
The Lawyers and Rates screen re-opens.

7. Click **OK** to close the Lawyers and Rates window.
Change special fields on the lawyer's information form

To change fields on the lawyer's information form, complete the following procedure.

1. Open the PCLaw application.
2. Click **General Setup** on the PCLaw Quick Step screen.
3. Click the **Lawyers and Rates** icon.
   
   The Lawyers and Rates screen opens.

4. Select the lawyer from the list whose information form must be changed/updated and click **Change**.
   
   The Change Lawyer Information screen opens.
5. Click the **Special Fields** tab.

The Change Lawyer Information Special Fields tab window opens.
6. Enter the field information associated with the lawyer’s information form as applicable and click **OK**. The Lawyers and Rates screen re-opens.

7. Click **OK** to close the Lawyers and Rates window.
Enter budget information for a lawyer

To enter budget information for a lawyer in the firm, complete the following procedure.

1. Open the PCLaw application.
2. Click **General Setup** on the PCLaw Quick Step screen.
3. Click the **Lawyers and Rates** icon.

The Lawyers and Rates screen opens.

4. Select the lawyer from the list to be associated with the budgeting information and click **Change**.

The Change Lawyer Information screen opens.
5. Click the **Budget Figures** tab.

The Change Lawyer Information Budget Figures tab window opens.
6. Select a Start Month and End Month using the associated drop-down arrows.

7. Enter the associated hours and values for the budgeted period in the corresponding fields.

8. (Optional:) Click the Load From button if the budgeted figures can be loaded from another location. The Load Budget Figures From window opens.

9. Select the applicable information from the Load Budget Figures From window and click OK. The Change Lawyer Information screen re-opens.

10. Click OK to close the Change Lawyer Information screen.
11. Click **OK** to close the Lawyers and Rates window.
Types of Law

To classify Matters, add, change, and/or remove a type of law for your firm, complete the following procedure.

Add a type of law

To add a type of law for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Click General Setup > Types of Law on the PCLaw Quick Step screen.

   The Types of Law window opens.

3. Click the Add button.

   The Add Types of Law window opens.

4. Enter the information in the Nickname, Type of Law, and Use Bill Settings fields as applicable.

5. Click OK.
The Types of Law window re-opens.

6. Click **OK** to close the Types of Law window.
Change a type of law information

To change the information for a specific type of law for your firm, complete the following procedure.

1. Open the PCLaw application.
2. Click **General Setup > Types of Law** on the PCLaw Quick Step screen.
   
The Types of Law window opens.

3. Select the Type of Law to be changed from the list and click **Change**.
   
The Change Type of Law window opens.

4. Change the information as applicable and click **OK**.
   
The Types of Law window re-opens.
5. Click **OK** to close the Types of Law window.
Remove a type of law

To remove/delete a type of law currently used by your firm, complete the following procedure.

1. Open the PCLaw application.

2. Click **General Setup > Types of Law** on the PCLaw Quick Step screen.

   The Types of Law window opens.

3. Select the type of law to be removed/deleted from the list and click **Remove**.

   A deletion warning message is displayed.

4. Click **Yes** to continue.

   The Types of Law window re-opens.

5. Click **OK** to close the Types of Law window.
Explanation codes

Explanation codes can be used by your firm to identify commonly performed activities. To add, change, and/or remove an Explanation code, perform the applicable procedure listed in this section.

Add a new explanation code

To add a new Explanation Code for your firm, perform the following procedure.

1. Open the PCLaw application.
2. Click **General Setup** on the PCLaw Quick Step screen.
3. Click the **Explanation Codes** icon.

   The Explanation Codes screen opens.

4. Click the **Add** button.

   The Add Explanation Code screen opens.
5. In the **Nickname** field, enter a nickname for the code.
6. (Optional:) Select the **Use with Task Based Billing** check box if applicable to your firm.
7. In the **Explanation** field, enter a brief description of the code.
8. Select all other check boxes applicable for use by your firm and click **OK**.

   The Explanation Codes screen is re-opened with a display of the added code.
9. Click **OK** to close the Explanation Codes screen.
Change an existing explanation code

To change an Explanation Code used by your firm, complete the following procedure.

1. Open the PCLaw application.

2. Click **General Setup** on the PCLaw Quick Step screen.

3. Click the **Explanation Codes** icon.

   The Explanation Codes screen opens.

4. Select the code from the list you wish to change, and click the **Change** button to continue.

   The Change Explanation Code screen opens.
5. Change the code information as applicable and click **OK** to continue.

The Explanation Code screen opens displaying the changed Explanation Code.

6. Click **OK** to close the Change Explanation Codes screen.
Remove an existing explanation code

To remove/delete an Explanation Code used by your firm, complete the following procedure.

1. Open the PCLaw application.
2. Click **General Setup** on the PCLaw Quick Step screen.
3. Click the **Explanation Codes** icon.
   
The Explanation Codes screen opens.

4. Select the code from the list you wish to change, and click the **Remove** button to continue.

   A deletion warning message is displayed.
5. Click **Yes** to continue.

The Explanation Codes screen re-opens.

6. Click **OK** to close the Explanation Codes screen.
Task codes

Task codes can be used by your firm to classify task-based billing activities and the work completed relative to time and fee entries. To add, change, and/or remove a Task code, perform the applicable procedure listed in this section.

Add a new task code

To add a new Task Code for your firm, perform the following procedure.

1. Open the PCLaw application.
2. Click **General Setup > Task Codes** on the PCLaw Quick Step screen.
   The Task Codes screen opens.

3. Click the **Add** button.
   The Add Task Code screen opens.
4. Enter a descriptive nickname and explanation of the task code in the **Nickname**, **Task Name**, and **Explanation** fields.

5. Select all other options that will be used by your firm for the new task code.

6. Click **OK** to close the Add Task Code window.

   The Task Codes window displays highlighting the added Task Code.

7. Click **OK** to close the Task Codes window.
Change an existing task code

To change an existing Task Code for your firm, complete the following procedure.

1. Open the PCLaw application.

2. Click General Setup > Task Codes on the PCLaw Quick Step screen.

   The Task Codes screen opens.

3. Highlight the Task Code to be changed and click the Change button.

   The Change Task Code screen opens.
4. Change the information on the screen as applicable and click **OK**.

   The Task Codes screen re-opens.

5. Click **OK** to close the Task Codes window.
Remove an existing task code

To remove/delete an existing Task Code used by your firm, complete the following procedure.

1. Open the PCLaw application.

2. Click **General Setup > Task Codes** on the PCLaw Quick Step screen.

   The Task Codes screen opens.

3. Highlight the Task Code to be removed/deleted and click the **Remove** button.

   A deletion warning message is displayed.

4. Click **Yes** to continue.

   The selected code is deleted from the list of current Task Codes.

5. Click **OK** to close the Task Codes window.
Template editor

To modify the appearance of PCLaw printed material, use the Template Editor.

Create a new template

To create a new template that can be used by the various staff in the firm, complete the following procedure.

1. Open the PCLaw application.
2. Click General Setup > Template Editor on the PCLaw Quick Step screen.
3. Click the Template Editor icon.
   The Template Editor window displays.
4. Go to File > New on the Main menu.
   The New Template window opens.
5. Select the type of template from the list of templates and click OK.
   An untitled template for the selected template type opens.
6. Select the applicable options/elements to complete the template design.
7. Save and close the template.
Bank account setup

The default bank accounts provided with PCLaw includes one General bank account, one Trust bank account, and one Patty Cash account, although other accounts may be added.

Add a bank account

Use the following procedure to add additional accounts for your firm.

1. Open the PCLaw application.
2. Click Accounting Setup on the PCLaw Quick Step screen.
3. Click the Bank Accounts icon.

The Bank Accounts window opens.

4. Click the Add button.

The Add Bank Account window opens.
5. Using the **Bank Type** drop-down arrow, select the account type to be added.

6. In the **PCLaw Account** box, enter the PCLaw account number if not entered automatically.

7. Using the **General Ledger** drop-down arrow, enter General Ledger information as applicable.

8. Complete all other fields for the bank account as applicable and click **OK**.

   The Bank Accounts window opens displaying the added bank account information.
9. Click **OK** to close the Bank Accounts window.
Change bank account information

To change information for an existing bank account used by your firm, use the following procedure.

1. Open the PCLaw application.

2. Click **Accounting Setup** on the PCLaw Quick Step screen.

3. Click the **Bank Accounts** icon.

   The Bank Accounts window opens.

4. Select the bank account from the list to be changed and click **Change**.

   The Change Bank Account window opens.
5. Change the information in the fields as applicable and click OK when done.

The Bank Account window opens displaying the changed account at the top of the list.
6. Click **OK** to close the Bank Accounts window.
Delete a bank account

To remove or delete an existing bank account used by your firm, use the following procedure.

**Note**

Default bank accounts supplied with the PCLaw application cannot be removed, deactivated, or deleted.

1. Open the PCLaw application.
2. Click **Accounting Setup** on the PCLaw Quick Step screen.
3. Click the **Bank Accounts** icon.
   
The Bank Accounts window opens.

4. Select the bank account from the list to be removed/deleted and click **Remove**.

   The delete warning message window opens.
5. Click Yes to continue.

The Bank Accounts window opens.

6. Click OK to close the Bank Accounts window.
Deactivate a bank account

To deactivate an existing bank account used by your firm, use the following procedure.

**Note**

Default bank accounts supplied with the PCLaw application cannot be removed, deactivated, or deleted.

1. Open the PCLaw application.
2. Click **Accounting Setup** on the PCLaw Quick Step screen.
3. Click the **Bank Accounts** icon.

   The Bank Accounts window opens.

4. Select the bank account from the list to be deactivated and click **Deactivate**.

   The selected bank account is removed from the list of accounts.

5. To show/display the deactivated account in the list, select the **Include Inactive Accounts** checkbox.
6. Click **OK** to close the Bank Accounts window.
Reactivate a bank account

To reactivate a bank account currently not being used by your firm, complete the following procedure.

1. Open the PCLaw application.
2. Click **Accounting Setup** on the PCLaw Quick Step screen.
3. Click the **Bank Accounts** icon.

The Bank Accounts window opens.

4. Select the **Include Inactive Accounts** checkbox.

Inactive bank accounts are displayed in the list.
5. Select the bank account from the list to be reactivated and click Reactivate.

The Reactivate button changes to Deactivate indicating that the account has been restored.

6. Click OK to close the Bank Accounts window.
Configure a merchant account

To configure a merchant account, complete the following procedure.

1. Open the PCLaw application.
2. Click **Accounting Setup** on the PCLaw Quick Step screen.
3. Click the **Bank Accounts** icon.

The Bank Accounts window opens.

4. Select the bank account from the list to be associated with the Merchant Account and click **Change**.

The Change Bank Account window opens.
5. Click the **Configure Merchant Account** button.

   You may be asked at this time to enter your Credit Card login information.

6. Enter your Credit Card login information and click **OK**.

   The PPI Account Information window opens.

7. Enter the PPI account information and click **OK** when done.

   The Change Bank Account window re-opens.

8. Click **OK** to close the Change Bank Account window.

9. Click **OK** to close the Bank Accounts window.
General ledger accounts

General Ledger (G/L) accounts are used by the firm to produce income statements and balance sheets. These accounts can be added, changed, and/or deleted.

Add a G/L account

Use the following procedure to add a G/L account for your firm.

1. Open the PCLaw application.
2. Click Accounting Setup on the PCLaw Quick Step screen.
3. Click the G/L Accounts icon.
   The G/L Accounts window opens.
4. Click the Add Item icon on the task bar.
   The New G/L Account window opens.
5. Enter the G/L account nickname and G/L type/name in the corresponding fields.

6. Complete all other information in the window as applicable and click OK.

   The G/L Accounts windows opens displaying the added account information.

7. Click the Save and Close icon to save the operation performed and to close the G/L Accounts window.
Change G/L account information

Use the following procedure to change the information for a G/L account currently being used by your firm.

1. Open the PCLaw application.
2. Click Accounting Setup on the PCLaw Quick Step screen.
3. Click the G/L Accounts icon.

The G/L Accounts window opens.

4. Select/highlight the account in the list to be changed.
5. Click the Change Item icon on the task bar.

The Change G/L Account window opens.
6. Change/update the information in the window as applicable and click **OK**.

   The G/L Accounts windows opens displaying the changed/updated account information.

7. Click the **Save and Close** icon to save the operation performed and to close the G/L Accounts window.
Delete a G/L account

Use the following procedure to delete a G/L account currently being used by your firm.

1. Open the PCLaw application.

2. Click **Accounting Setup** on the PCLaw Quick Step screen.

3. Click the **G/L Accounts** icon.

   The G/L Accounts window opens.

   ![G/L Accounts Window](image)

4. Select/highlight the account in the list to be deleted.
5. Click the **Delete Item** icon on the task bar.

The delete warning message opens.

6. Click **Yes** to continue.

The selected G/L Account is deleted.

7. Click the **Save and Close** icon to save the operation performed and to close the G/L Accounts window.
Department codes

Task codes can be used by your firm to group lawyers, bank accounts, and G/L accounts. By grouping accounts, general ledger statements for the firm or a specific department can be created. To add, change, and/or remove a Department code, perform the applicable procedure listed in this section.

Add a new department code

To add a new Department Code for your firm, perform the following procedure.

1. Open the PCLaw application.
2. Click Accounting Setup on the PCLaw Quick Step screen.
3. Click the Department Codes icon.
   The Department Codes screen opens.

4. Click the Add button.
   The Add Department Code screen displays.
5. Enter a descriptive nickname and name for the department code in the **Nickname** and **Name** fields and click **OK**.

The Department Code window opens displaying the added code.

6. Click **OK** to close the Department Codes window.
Change an existing department code

To change an existing Department Code for your firm, complete the following procedure.

1. Open the PCLaw application.
2. Click Accounting Setup on the PCLaw Quick Step screen.
3. Click the Department Codes icon.

The Department Codes screen opens.

4. Highlight the Department Code to be changed and click the Change button.

The Change Department Code screen opens.

5. Change the information on the screen as applicable and click OK.

The Department Codes screen re-opens displaying the updated Department Code.
6. Click **OK** to close the Department Codes window.
Remove an existing department code

To remove/delete an existing Department Code used by your firm, complete the following procedure.

1. Open the PCLaw application.
2. Click **Accounting Setup** on the PCLaw Quick Step screen.
3. Click the **Department Codes** icon.

   The Department Codes screen opens.

   ![Department Codes screen](image)

4. Highlight the Department Code to be removed/deleted and click the **Remove** button.

   A deletion warning message is displayed.
5. Click **Yes** to continue.

The selected code is deleted from the list of current Department Codes.

6. Click **OK** on the Department code screen to close the window.
Vendors

Vendor information can be added, changed, and/or deleted.

Add a new vendor

Use the following procedure to add a new vendor that will be utilized by your firm.

1. Open the PCLaw application.

2. Click **Accounting Setup > New Vendor** on the PCLaw Quick Step screen.

   The New Vendor screen is displayed.

3. In the **Vendor** box, type the vendor's nickname and/or number.

4. Complete all other vendor information on the form as applicable.

5. Click the **Opening Balances** tab to enter opening balance information for this vendor.

   The Opening Balances window opens.
6. Select the appropriate date and enter all other opening balance information as applicable.

**Note**

Click the **Remove** button to remove data entries from the Opening Balances form.

7. Click **OK** when done.
Change vendor information

Use the following procedure to change information for a vendor that is being utilized by your firm.

1. Open the PCLaw application.
2. Go to **File > Vendor > Open Vendor** on the Main menu.
   
The Select Vendor screen opens.

3. Use the drop-down arrow to select a vendor.
   
The Pop Up Help - Vendors window opens.

4. Select the vendor from the list and click **OK**.
   
The Select Vendor window opens.

5. Click **OK**.

   The Change Vendor screen displays.
6. Change the vendor information as applicable.

7. Click OK to save the changes.

The Change Vendor window closes.
Vendor deactivation

Use the following procedure to deactivate a vendor that is not being utilized by your firm.

1. Open the PCLaw application.

2. Go to File > Vendor > Open Vendor on the Main menu.

   The Select Vendor screen displays.

3. Use the drop-down arrow to select a vendor.

   The Pop Up Help - Vendors window opens.

4. Select the vendor from the list and click OK.

   The Select Vendor screen displays.

5. Click OK to continue.

   The Change Vendor screen displays.
6. Click the **Active** check box to deactivate the vendor and click **OK**.

**Note**

If there are outstanding balances for the vendor, a warning message is displayed.

7. Click **OK** to deactivate the vendor and to close the screen.
Verify data integrity

Data integrity verification is a maintenance process used by the PCLaw application to ensure that there is no data corruption.

To perform a data integrity verification check, complete the following steps.

1. Open the PCLaw application.

   Note
   If you are not the only user in PCLaw, all other users must exit PCLaw before you can backup your data.

2. Go to Options > Administrator > Lock System.

   The Lock PCLaw System window opens.

3. Click Lock.

   A PCLaw priority message is sent to all users to exit the application.

4. Go to Tools > Verify Data Integrity.

   The Verify Data Integrity window opens.
5. Select the data area from the list to be verified, and click OK to continue.

A PCLaw advisory screen displays.

6. (Optional:) Click View DB Log to view the verification log, if one was created.

7. (Optional:) Click Reset DB Log to clear the verification log.

8. (Optional:) Click Reset Matter Bals to recalculate Matter totals based on the contents of the Client Ledger.

9. (Optional:) To analyze the speed at which PCLaw operates on a network, click Network Analyzer.

   For assistance in using the Network Analyzer, contact LexisNexis PCLaw Technical Support.

10. Click OK to start the verification process.

    If the verification process completes successfully, a PCLaw prompt appears.

11. Click OK to complete the verification process.
PCLaw mobility

PCLaw® Mobility is a service provided by the PCLaw application that enable users to view and add information using mobile devices. This document describes how to configure and setup the PCLaw Mobility service, also referred to as the LexisNexis® Mobility Access Manager.

Before installing and configuring the LexisNexis Mobility Access Manager:

1. Read this information thoroughly
2. Review and/or print the checklist provided to assist you in successfully completing the installation and/or setup
3. Check each item off the list as it is completed through completion.

Checklist compliance and assistance

It is pertinent that each item in the checklist be reviewed and completed prior to attempting to install and/or configure the PCLaw Mobility service. If further assistance is needed to ensure that items on the checklist are successfully completed, please follow the links and/or instructions provided.

- **Annual Maintenance Plan:** For assistance on obtaining an Annual Maintenance Plan (AMP), please contact the LexisNexis Practice Management Sales department at 1-800-328-2898.
- **Requirements:** To ensure your firm's system meets and/or exceeds the minimum set of requirements, see [http://support.lexisnexis.com/pclaw/record.asp?ArticleID=6820](http://support.lexisnexis.com/pclaw/record.asp?ArticleID=6820).
- **PCLaw setup file:** To download and run the PCLaw setup file, refer to the PCLaw Installation guide and complete the steps in the **Download and Run the Installer** topic.
- **PCLaw initial setup:** To complete the initial PCLaw setup, refer to the PCLaw Installation guide and complete the steps in the **Initializing PCLaw Data** topic.
- **PCLaw Mobility:** If PCLaw Mobility will be used by your firm, follow the steps provided in PCLaw Mobility Setup portion of this document.

This checklist is intended for use by PCLaw administrators who’s preparing to install the PCLaw Mobility service on one or more computers in their firm.

**Note**

The computer where you want to install the LexisNexis Mobility Access Manager must meet the requirements listed in the PCLaw Mobility Installation Checklist.

PCLaw mobility installation checklist

- Your firm has an active Annual Maintenance Plan (AMP) with a Product Key?
- Each computer is continually available to all PCLaw users in your firm. In a multi-user environment, the computer should be connected to your network.
- Each computer has network access to the server(s) running your PCLaw database. (You can install the LexisNexis Mobility Access Manager on the database server itself.)
- Your system meets the minimum/recommended set of requirements?
The PCLaw application has been installed for the firm?
PCLaw Link as a Service has been installed?
The PCLaw Mobility service has been enabled for the entire firm?
PCLaw Mobility has been enabled for each Mobility user in the firm?
Download and install the LexisNexis® Mobility Access Manager
Ensure that user passwords meet the strong password requirements
Provide users with the Mobility URL: https://pclawmobility.lexisnexis.com
Enable PCLaw Link to run as a service

After the PCLaw application has been successfully installed and setup for your firm, perform the following steps to enable the PCLaw Link to run as a service for your firm.

To install the PCLaw Link as a Windows service:

1. Go to All Programs > LexisNexis > PCLaw > Utilities > Configure Link to Run as Windows Services.

The Install PCLaw Link as Windows Services screen opens.

![Install PCLaw Link as Windows Services](image)

2. On the Install PCLaw Link as Windows Services screen, enter your administrative computer\user name and password in the following format: Computername\Username.

3. Click Configure to continue.

The Install PCLaw Link as Windows Services is opened indicating that the PCLaw Link has been configured.

Note

If the PCLaw database is not on the same machine where the Mobility Access Manager is being installed, PCLaw must be configured to access its database using a Universal Naming Convention (UNC) path.
4. Click **Done** when the process is complete.
Enable PCLaw mobility for the firm

To enable PCLaw Mobility for the firm, perform the following procedure.

1. Log in to PCLaw as an administrative user.

2. Click **Options > Administrator > Security Preferences**.
   
   The Security Preferences screen opens.

3. On the Security Preferences screen, select **Enable Advanced Security** and click **OK**.

4. Click **Options > Connection Settings**.
   
   The Connection Settings window opens.
5. On the Connections Settings tab, select the **Use This Set of Books When Connecting with Other Programs** check box.

6. In the **Login As** field, type the user name of your Administrator account.

7. Select the following check boxes:
   - **Store Password** – type the password for the Administrator user
   - **Use Mobility Feature**

8. Click **OK**.

9. Click **Yes** if you are asked if you want to allow PCLaw to make changes.
Enable PCLaw mobility for each user

To enable PCLaw Mobility for each user in the firm that will use it, perform the following procedure.

1. Log in to PCLaw as an administrative user.

2. Click Options > Administrator > Security.
   The Security Setup screen opens.

3. On the Users tab, select a user other than the administrator in the list box on the left.

4. In the E-mail field, type an e-mail address for the user. The user will have to type this e-mail address when signing in to PCLaw Mobility.

   **Note**

   Each Mobility user must have an e-mail address and a strong password. If a user does not have a strong password, you must provide one when you enable Mobility for the user.

5. In the Industry field, use the drop-down arrow to select the applicable industry type for the user.

6. Select the Enable access to mobility feature check box.

7. In the Default Lawyer field, select a lawyer to associate with the user.
8. Use the Add button to add the user to an assigned Group.

9. Repeat Step 3 through Step 8 for each user for whom you want to enable PCLaw Mobility access.

10. Click OK to close the Security Setup screen.

11. Distribute the PCLaw Mobility website URL to each Mobility user.

   The URL is https://pclawmobility.lexisnexis.com.

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**Download and install the LexisNexis® Mobility Access Manager**

To obtain the latest version of PCLaw Mobility, you must successfully install the latest version of LexisNexis® Mobility Access Manager using the following procedure.

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**Note**

Install LexisNexis Mobility Access Manager on the same PC as the PCLaw Link Services.

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1. Open a web browser and go to [http://support.pclaw.com/techpage](http://support.pclaw.com/techpage).

   The PCLaw Downloads page opens.

2. Select **PCLaw® Version XX.X** (where XX.X equals the version) from the drop-down list and click Go.

   The LexisNexis PCLaw Software License Agreement page.

3. Enter your firm's information in all required boxes marked with an asterisk.

4. Click **I have read and agree with the End-User License Agreement**.

   The LexisNexis Available Downloads page displays.

5. Click **download** under the action column to download the latest version of the LexisNexis® Mobility Access Manager.

6. Click **Save** to save the file to your desktop.
7. Double-click the `setup.exe` file on your desktop and click **Run** to run the installer.

**Note**

If Microsoft .NET 4.0 is not detected on your computer, the installer downloads and installs it.

The LexisNexis Mobility Access Manager - InstallShield Wizard window displays.

8. Click **Next** on the Welcome screen to install the latest version of the LexisNexis Common API.

The End User License Agreement screen displays.

9. Select **I accept the terms in the license agreement**.

10. Click **Install** to continue.

11. Please wait while the program is installed. This may take several minutes.

12. Click **Finish** on the InstallShield Wizard completed screen.

   Please wait for the Welcome screen to display.

13. **(PCLaw Users Only:)** Click **PCLaw Configuration Instructions** for items that must be completed prior to completing this installation.

    The PCLaw Mobility Setup Instructions are displayed.

14. Click **Next** on the Welcome screen after all pre-requisite items are done.

    The License Agreement screen displays.

15. Select **I accept the terms in the license agreement**.

16. Click **Next** to continue.

    The Installation Settings screen displays.

17. Enter the email address and confirmation that will be used to received update notifications and other messages.

18. Click **Next**.

    The SMTP Email Settings screen displays.

19. Perform one of the following:

    Click **Skip this Step** if you will not be using the email capabilities, or if you would like to enter this information at a later time.

    - or -

    In the **SMTP Server** and **Send email messages from** boxes, enter the applicable data.

**Warning**

Do not use special characters in the name such as a hyphen, etc. (i.e., SMTP-Server.nc.rr.com), otherwise, the name will not be recognized as a valid server name.
(Optional:) Enter the user name and password for the email address entered in the previous step.
(Optional:) Click Test Settings to confirm your entries.

20. Click **Next** on the SMTP Email Settings screen to continue.
    The Confirm Installation screen displays.

21. Click **Install**.
    The Installing LexisNexis Mobility Access Manager screen displays.

22. After all new features have installed, the Additional Steps screen displays.

23. Click **Finish and View Instructions** to view the additional setup requirements.
    The Mobility Setup Instructions displays.

24. Complete the steps outlined in the instructions as applicable.
Upgrade LexisNexis® Mobility Access Manager

To successfully upgrade to the latest version of PCLaw Mobility, you must install the latest version of LexisNexis® Mobility Access Manager using the following procedure.

1. Open a web browser and go to [http://support.pclaw.com/techpage](http://support.pclaw.com/techpage).
The PCLaw Downloads page opens.

2. Select **PCLaw® Version 12.X** or the latest version from the drop-down list and click **Go**.
The LexisNexis PCLaw Software License Agreement page.

3. Enter your firm’s information in all required boxes marked with an asterisk.

4. Click **I have read and agree with the End-User License Agreement**.
The LexisNexis Available Downloads page displays.

5. Click **download** under the action column to download the latest version of the LexisNexis® Mobility Access Manager.

6. Click **Save** to save the file to your desktop.

7. Double-click the **setup.exe** file on your desktop and click **Run** to run the installer.

   **Note**
   
   If Microsoft .NET 4.0 is not detected on your computer, the installer downloads and installs it.

   The LexisNexis Mobility Access Manager - InstallShield Wizard window displays.

8. Click **Next** on the Welcome screen to upgrade to the latest version of the LexisNexis Common API.

9. Click **Next** to continue.

   The Upgrading LexisNexis Common API screen displays.

   Please wait, this may take several minutes.

10. Click **OK** on the LexisNexis Common API screen to continue.

11. Click **Finish** on the InstallShield Wizard Completed screen.

   Please wait.

12. Click **Next** on the Welcome screen.

   The Email Address screen displays.

13. In the **Enter Email Address** box, enter the email address of the person to notified when updates are available.
14. In the **Confirm Email Address** box, re-enter the email address of the person to notified when updates are available.

15. Click **Next**.

   The SMTP Email Settings screen displays.

16. Perform one of the following:

   Click **Skip this Step** if you will not be using the email capabilities, or if you would like to enter this information at a later time.

   **Warning**

   This installation must be rerun to complete the SMTP Server, Port, and email information if the information was not entered and it is intended to be used at a later time.

   - or -

   In the **SMTP Server** and **Send email messages from** boxes, enter the applicable data.

   Click **Test Settings** to confirm your entries.

   The Upgrading LexisNexis Mobility Access Manager screen displays.

17. Click **Upgrade**.

   The Upgrade LexisNexis Mobility Access Manager screen displays.

18. After all new features have installed, the Additional Steps screen displays.

19. Click **Finish and View Instructions** to view the additional setup requirements.

   The Mobility Setup Instructions displays.

20. Complete the steps outlined in the instructions as applicable to finalize your installation and setup.