

Frequently Asked Questions: A to Z

AdvantageLaw Customer Support

Accounting & General Ledger

Question: *I have just started using the AdvantageLaw program and want to set up my existing, current balances for my General Ledger (GL) accounts?*

Answer: From the home screen follow these steps:

- 1) Go to "Master Files" screen
- 2) Under the "Control" header, select "Control File"
- 3) Change the "Accounting Month" to the desired start date in order to sync the data
- 4) Go to "Financials" screen
- 5) Select "Trial Balance" from the drop down menu on the right in order to see the accounts that are in place
- 6) Return to "Financials" screen
- 7) In order to manually enter the beginning balances, select "Year View" to see a chart of your balances
- 8) Select the "Balances" tab and you will see a yellow column
- 9) Manually enter in the desired trust balances
- 10) Select "Utilities" and chose "Update beginning Balances" from the drop down menu
- 11) Check the balances to ensure all the manually entered data synced.

Question: *How do I provide a credit for a client on an invoice?*

Answer: You may add a courtesy discount (credit) by following these steps from the home screen:

- 1) Select "Time Keeping"
- 2) Select "Detail" to arrive at the "Time & Cost Entry" screen
- 3) Select the "Credit Box" on the top right
- 4) Enter the amount and assign to the Matter ID
- 5) Click on "Save Entry (F2)"
- 6) This action will display as a discount on the invoice

Question: *I have a couple of old entries in the system that show up when I run trust reports. How do I get rid of these false entries?*

Answer: You may edit the underlying trust detail directly by following these steps from the home screen:

- 1) Select "Trust Accounts"
- 2) Choose the Matter to view the entries in the grid
- 3) Type zero ("0") in the amount box for the false or undesired entry
- 4) Select "Utilities"
- 5) Select "Update Trust Detail"
- 6) Check that the item has been deleted

Question: *How do I enter a deposit which is a refund so it not added into the income account?*

Answer: From the home screen, follow these steps:

- Go to "Cash Receipts"
- Directly above the grid, select the "Enter Misc" tab (see screen shot below)
- This grid allows you to enter non-client cash receipts
- Enter the amount and the appropriate General Ledger account to be credited.
- Select "Apply Payment" to post the receipt

Question: I have some deposits on my register that are incorrect. How do I reverse deposits?

Answer: You may edit deposits by following these steps from the home screen:

- 1) Start on the "Cash Receipts" screen and follow these steps:
- 2) In the "Search based on" field, select "Matter"
- 3) In the "Selection" field, enter the Matter ID
- 4) Click on "Payment Log" (above the table)
- 5) Locate the deposit in the list
- 6) Right mouse click on the row with the desired deposit and select the action "Delete Payment" or "Change Payment" and follow the steps to correct the deposits.

Question: How can I set up or change a General Ledger (GL) account?

Answer: From the home screen, follow the steps below:

- 1) Go to "Master Files"
- 2) Select "Chart of Accounts"
- 3) You may use the GL accounts that are already in place with the AdvantageLaw program
- 4) Alternatively, browse to the desired GL account line and right mouse click on the line.
- 5) A green line will appear and you may manually input a new account.
- 6) The system is set to default to a GL number and it is not recommended to change the GL code, unless you have never used the account.

Billing, Invoicing & Payments

Question: How do I preview and finalize invoices to send out?

Answer: In order to preview and begin to send out invoices using AdvantageLaw, please follow these steps:

- 1) Go to the "Billing" screen
- 2) Click "Add to List" (this will bring up all your matters with unbilled time)
- 3) Choose "Set Approval Code" to "Interim". This is the normal client bill setting indicating that you are printing an interim bill for the ongoing matter. Special settings for approval code are: (F) final – indicates that this is the final bill for a matter, (C) : costs only bill, (H): History bill, (P): Proforma (preview mode)
- 4) Note, leave blank the field for "WIP Start Date", but ensure the "Cutoff Date" is accurate
- 5) Select the Print to device; Screen, Printer or PDF
- 6) Select "Print Bills" (you will see a pop up message that the system is preparing files)
- 7) If you only want to print the invoice for a select matter, click on the desired matter, right mouse click and select "print invoice"
- 8) After bills are printed and sent out the final step is to Transfer the billing results to accounts receivable. Click Update Bills to AR. This is the final step in the process. You should only do this when you are sure you have completed the bill printing process.

Question: *How do I apply a flat fee to an invoice and ensure the hours do not appear on my invoice?*

Answer: In order to apply a flat fee and suppress the hours on the invoice, please follow these steps from the home screen:

- 1) Select "Client/Matters"
- 2) Search and select the desired Matter ID
- 3) Select the "Billing Info" tab and under "Billing Rates"/"Fee Billing Basis" select "Flat Fee"
- 4) Continue to the "Flat Fee Info" tab and under "Flat Fee Info"/"Flat Fee Amount" enter the desired dollar amount to be invoiced as a flat fee
- 5) Under "Frequency" select "1: one time"
- 6) Click "Start (F2)" and confirm the operation

Question: *I want to make a change to an invoice/bill before I approve and send it out. How do I reverse a bill that I set to final?*

Answer: In order to reverse a bill from final back to interim status, please follow these steps:

Select "Utilities" at the top of the navigation bar

- 1) In the "Time and Utilities" screen, enter "Client/Matter"
- 2) Select "Reverse a Bill"
- 3) Click "Start (F2)" and confirm the operation

Question: *How do I apply incoming cash receipts or payments?*

Answer: In order to apply payments in AdvantageLaw, please follow these steps:

1. Go to "Cash Receipts" screen
2. In the "Selection" field, enter the client's name or ID (or * for a full list of all clients)
3. Total owed amount will pre-populate (assuming the invoice was sent and is due)
4. Enter the amount received in the "Receipt amount"
5. Enter details in the "Memo" field (including check #)
6. Select the desired bank account from the "Deposit into Bank" drop down menu
7. Enter "Receipt Date"
8. Click "Apply Payment"
9. You may check that your payment was applied by opening the "Checks" screen and selecting "Bank Register" and click "Search" to view the payment activity.

Question: *I want to print new invoices but even when I choose "active" and "AR owed" matter, closed matters are printing too. What can I do to select only open and active matters?*

Answer: In order to reset the closed, inactive information for each matter, please follow these steps:

1. Ask everyone to exit the AdvantageLaw program
2. From the home screen select "Utilities" (note: if you don't see this option, you do not have the required Administrator access)
3. From the drop down menu, select "Audit Database"
4. Depending on the size of the database, this process can take up to 10 - 15 minutes to complete.
5. Once the process is complete, users can open AdvantageLaw and continue to work. No reboot is required.

Question: *How do I browse the status of our payments history?*

Answer: You are able to browse balances and payment history by choosing the "Cash Receipts" from the home screen and selecting the assigned tabs above the grid (*i.e.*, Balances, Bill and Pay Detail, Payment Log, etc.).

Question: *How do I delete a payment that I accidentally logged?*

Answer: In order to delete an unwanted payment, go to select item in the grid, right mouse click and select "Delete Payment".

Question: *How can I delete a deposit I applied to "Miscellaneous" rather than to a "Matter"?*

Answer: You can see and delete deposits or cash receipts applied to "Miscellaneous" by following these steps from the home screen:

- 1) Select "Cash Receipts"
- 2) Note: do not choose any Client or Matter ID
- 3) In the grid below, click on the "View Misc." tab
- 4) Locate the desired deposit to delete and right mouse click inside the selected row
- 5) Select "Delete Deposit" and confirm

Question: *I have a flat fee invoice and only want to show the dollar amount of the flat fee billed, however, I also want to include detail of costs. How do I do this?*

Answer: From the home screen, follow these steps:

- Go to "Client Matters" and select "Matter View"
- Select "Billing Info"
- Go to the "Flat Fee Info" tab
- Enter flat fee dollar amount
- Set "Bill Style" to 1: "print summary text"
- Select "Save (F2)" to save this setting
- Matter costs should already print out since this is the default setting, unless they have been altered.

Question: *Some of our clients did not receive their bills and are asking us to resubmit them. How can I do this without reversing the original bills?*

Answer: You are able to reprint any invoice from history by following these steps from the home screen:

- Go to "Billing"
- Select "Special Output" and from the drop down menu choose "Reprint Bills from History".
- You will be prompted for invoice numbers(s) to reprint.
- You can also reproduce LEDES export files for an updated invoice and in order to do this, select "Special Output" and choose "Export History Bills".

Question: *How do I set up email billing?*

Answer: You may produce PDF documents for each bill in a batch, and you can send emails in a batch to selected clients using the Billing PDF and email options. First, confirm you are setup for PDF printing. To use AdvantageLaw PDF printing, you must change the printing preferences settings for the Adobe, Black Ice or a similar application.

For detailed instructions on how to set up email billing:

- 1) Go to home screen
- 2) Choose "Help" on the top of the navigation bar
- 3) Select "Guide 1: Time and Billing, System Installation" and open this PDF document
- 4) Go to page 75, where you will see "PDF and processing of email bills"
- 5) Note: please follow the full set of instructions on pages 75 - 79 for how to set up email billing and be sure to view the screen shots provided to help you to set this up)

Check Writing

Question: *How do I write and record our checks in order to pay vendors?*

Answer: To begin to use the check writing feature in the AdvantageLaw program, follow the steps below from the home screen:

- 1) Go to "Checks" screen (also called "Accounts Payable")
- 2) Click "New Voucher" to indicate you are going to write a check
- 3) View the list of vendors by using the asterisks (*) in the "Vendor" field
- 4) Select the vendor to be paid and tab through: "Amount", "Pay Amount", "Invoice Date", "Pay Date"
- 5) For "Check No", leave blank if you are printing checks from the AdvantageLaw system but, enter your check numbers if you are not using the system to print checks.
- 6) Assign to a GL account from the drop down and add description
- 7) If this is a reimbursable item, complete the blue fields for "Matter", etc.
- 8) Select "Save (F2)"
- 9) If the vendor requires a 1099, you will need to go to the "Vendor" screen and ensure that the vendor details include a 1099 selection.
- 10) It is important to note that anyone who receives a check from your firm **MUST** be set up as a vendor first (including owner distributions and clients who require a refund check).

Question: *How do I view my bank check registry?*

Answer: In order to view your bank registry activity, go to the "Checks" or "Accounts Payable" screen and select "Bank Register". Choose the bank accounts that you would like to view and click "Start".

Question: How can I write a distribution check to myself?

Answer: You must set up yourself as a vendor in the program before issuing yourself any payments. It is important to note that anyone who receives a check from your firm **MUST** be set up as a vendor first, including owner distributions and clients who require a refund check.

Question: May we can enter checks without having an opening balance entered? How do you enter beginning balances for a bank account?

Answer: From the home screen, follow the steps below:

- 1) Go to "Financials"
- 2) Select "Year View"
- 3) Select the "Balances" tab with the include "idle" box checked
- 4) In the yellow column, you can plug in year-opening balances for each account as needed (see screen shot below)
- 5) Go to "Utilities" (top navigation) and select "Update Beginning Balance"

GL Acct	Description	1/1/2014	01/31/2014	02/28/2014	03/31/2014	04/30/2014	05/31/2014	06/30/2014	07/31/2014	08/31/2014	09/30/2014	10/31/2014	11/30/2014
10110	FIRST BANK	13450											-21235
10300	CASH IN TRUST												23800
11900	REIMBURSABLE COSTS - AS												242
20700	RETAINERS PAYABLE												
21100	TRUST ACCT RESERVE												-23800
50100	FEE INCOME												-3740
50100-DEN	FEE INCOME												
50300-DEN	INTEREST INCOME												
61400	BUILDING MAINTENANCE												400
72419	COMPUTERS MAINTENANCE												24333
Totals													

Question: How can I set up a check for printing?

Answer: From the home screen, follow the steps below:

- 1) Go to the "Checks" screen
- 2) Select "Check Printing"
- 3) Choose "Check Layout", which is where you can define the physical positioning of each element for your checks
- 4) This is a trial and error process to determine the best layout for your firm's checks
- 5) To test the design process, go to "Check Printing" and Under "Action" select "Use Print a Test Check", located as a drop down menu option
- 6) We advise you print test checks on paper so as not to waste real checks

Client/Matter

Question: How do I assign or change an existing Matter ID to a new, different ID number and keep all the posted time from the original Matter ID?

Answer: First create a new Matter record and from the home screen follow these steps:

- 1) Select "Utilities"
- 2) Select "Billing Utilities"
- 3) Select "Change Matter ID" in the column to make the change (to either "Unbilled Items" or for "All Info")
- 4) Enter the original Matter ID number in the "Current" Matter ID field and the new Matter ID in the "New" Matter ID field.
- 5) Select "Start (F2) to make the changes
- 6) These steps will allow update the Matter data to a new Matter ID without losing the time activity

Question: *How do I see a full list of my Clients and Matters?*

Answer: From the AdvantageLaw home screen, follow these steps:

- 1) Select "Client/Matters"
- 2) Type an asterisks (*) in the search field called "Client ID" or "Matter ID" (depending on which screen your program is set to default)
- 3) Hit "Enter" or "Tab" to display full list of clients

Question: *How can we add various party relationships (spouse, step-father, niece, etc.) to display in our "Conflicts" drop down menu?*

Answer: This drop down menu can be user-defined and allows you to add in any relationship categories. From the home screen, follow these steps:

- 1) Go to "Master Files"
- 2) Under "Control" select "Party Relationships"
- 3) In the "Code" field, enter the asterisks (*) sign and hit the "Tab" on your keyboard to display all the party relationship categories you currently have in the program
- 4) If the category you would like is not listed, you may add a new party relationship, enter short code and a description in the "Description" fields
- 5) Select "Save (F2)"
- 6) Refresh and check that the new code appears

Q: What happens if we have time that was deleted and then we delete the matter too? Can we retrieve deleted time entries?

A: You can add the deleted matter back in under "Client Matters". If you use the same matter ID, it will reconnect to any detailed items, including deleted time entries. To add the matter, click Client Matters, Matter View. Use the normal process to add the matter, using the same Matter ID as the deleted matter.

Contacting Customer Support

Question: *How can I receive Customer Support?*

Answer: There are several options to reach AdvantageLaw support:

- 1) Call our office 8am to 5pm MT at 303-369-5160 and feel free to leave a voice mail if no one is able to answer as we monitor the voice mail box frequently. You may press # to bypass our outgoing message.
- 2) Email support@advantagelaw.com and include as much detail as possible, including screen shots when possible.
- 3) Go to www.winvantage.com and log on with your user name and password post a message on the support "wall". One of our customer service reps will respond by either calling or emailing you back. You are able to add attachments here as well.
- 4) On home screen, click on "Help" and browse one of the three (3) detailed help guides. These Help Guides also appear on various screens when you are inside the AdvantageLaw system.

Costs

Question: I cannot find information for a vendor and might have accidentally deleted the vendor while in the Vendor screen. Can I restore all of this vendor's information?

Answer: You can add a deleted Vendor ID back into the system. The system will reconnect all detailed records for the vendor, so that you can see the full history. To add the vendor, click Master Files, Vendors. Use the normal process to add the vendor using the same Vendor ID as the deleted vendor.

Question: *We want to merge all of our copy and print costs into one line item on our client's bill. Instead of having a line item for each copy expense (i.e., color, b/w, etc.), we want to have one line item that combines all copies entitled "Reproduction Costs".*

Answer: From the home screen follow these steps:

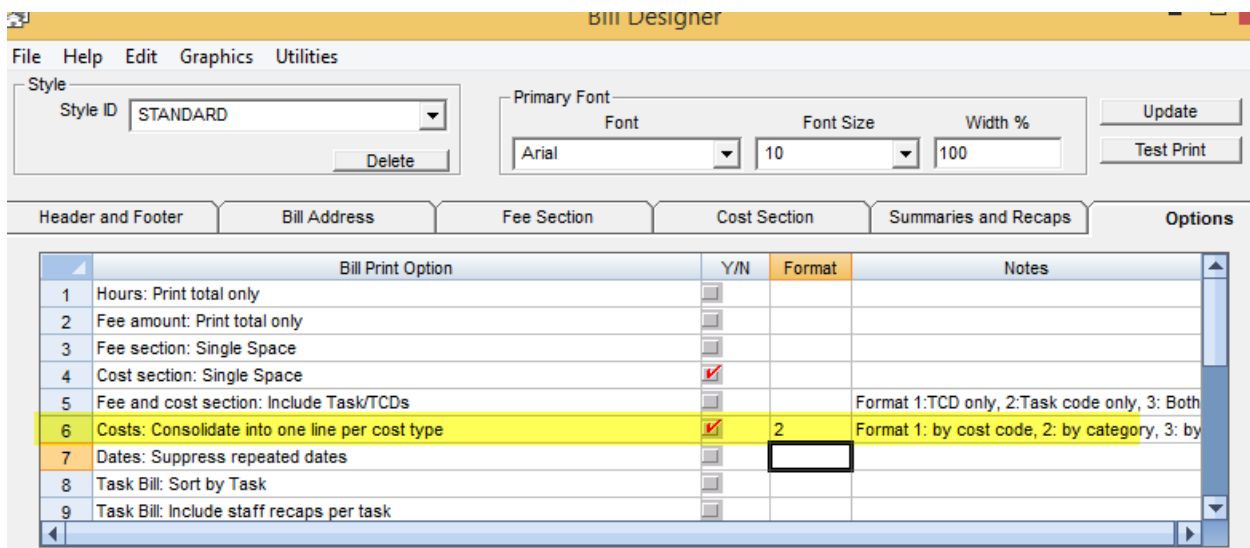
- 1) Go to "Master Files"
- 2) Under "Timekeeping" select "Task Codes"
- 3) Create a new short task code for the overall cost category, e.g., "REP" for reproduction costs (see screen shot below)

The screenshot shows the 'Task Codes' window with a menu bar (File, Help) and a toolbar. The 'Task Code' field contains 'REP'. A 'New Record' button is highlighted in yellow. The 'Description' field contains 'Reproduction costs'. Other fields include 'Category GL', 'TCD Type', and 'Inactive'.

- 4) Return back to "Master Files"
- 5) Under "Timekeeping" select "Transaction Codes"
- 6) Assign the various individual cost codes to the containing category code and save (see screen shot below)

The screenshot shows the 'Transaction Codes' window with a menu bar (Help) and a toolbar. The 'TCD' field contains 'CPY'. An 'Edit Record' button is highlighted in yellow. The 'Type' field contains '1' and 'Sub Type' contains 'E'. The 'Text' field contains 'Photocopies<copies<page'. The 'Fixed Rate' field contains '.45', 'Fixed Amount' contains '0.00', and 'Fixed Hours' contains '0'. The 'Category' dropdown menu is open, showing 'REP: Reproduction costs' selected. Other fields include 'Pct of Fees', 'Markup %', 'L-Code', 'A-Code', 'GL Accrual', 'GL Cash', 'Consolidate', 'Suppress Date', 'Assoc TCD', and 'Inactive'.

- 7) From the home screen, go to "Billing" and select "Bill Designer"
- 8) Select the "Options" tab, check box 6 "Costs: Consolidate into one line per cost type" and enter "2" in the column setting for "Format" (see screen shot below)



Data Management

Question: *Can I use Microsoft Access to manipulate the database information? If so, what is allowed?* **Answer:** The AdvantageLaw database is in Microsoft Access format. We do not advise you to manipulate the database information, as it could possibly cause additional problems to your system.

Question: *Can I use a "practice" database and then move selected tables into the "real" database when we go active on AX?*

Answer: You can use your existing startup database as a "practice" database. We can assist you in moving tables to the "real" database for an additional fee.

Question: *I would like to convert client and matter data from my previous legal management software. Are you able to help with this process?*

Answer: We've converted many competitor data files notably, PC Law, Timeslips, and Tabs. It can be done, but we need to review the formatting and structure of the database in these systems and determine how much time it will require. This is billed out as a separate service.

Question: *How do I get rid of a grid, which display when I conduct a search in AdvantageLaw?*

Answer: Simply hit the "Escape" key on your keyboard to hide any of the program's pop up grids, which may appear.

Error Messages

Question: *I am getting an error message regarding the database and can't get past it to complete the task. What can I do?*

Answer: For any error messages that include the phrases: '*... record is deleted...*' OR '*... invalid bookmark...*' follow these steps:

- 1) Ask everyone to exit the AdvantageLaw program
- 2) From the home screen select "Utilities" (note: if you don't see this option, you do not have the required Administrator access)
- 3) From the drop down menu, select "Compact Database"
- 4) This will compress and restructure the database file. The error condition will be repaired. Depending on the size of the database, this process can take up to 30 minutes to complete.
- 5) Once the process is complete, users can open AdvantageLaw and continue to work. No reboot is required.

Question: I see this error message, "Error in Processing - No Value Given - Exit WinVantage? Yes or No" and I cannot perform any actions in the program. What can I do?

Answer: For any error messages that include the phrase 'No Value Given' please follow these steps:

- 1) Ask everyone to exit the AdvantageLaw program
- 2) From the home screen select "Utilities" (note: if you don't see this option, you do not have the required Administrator access)
- 3) From the drop down menu, select "Update Database Structure"
- 4) This process adds needed fields to the database. It usually takes less than a minute to complete. You need administrator rights to access this utility.
- 5) After completion, restart AdvantageLaw and retry the function causing the problem. If the problem persists a please contact Advantage support.

Question: The program is running slowly and giving me occasional error messages. I think I may have an old version of the program. How do I get an update?

Answer: It is always a good idea to check for software updates every 2-3 months to ensure you have the latest, most efficient program. To update your program, follow these steps:

- 1) From the home screen select "Help"
- 2) From the drop down menu, select "Get Latest Program Update"
- 3) Follow the steps to unzip the new files and install the program, which should only require a few minutes.
- 4) After completion, restart AdvantageLaw and from the home screen select "Help" and select "About AdvantageLaw"
- 5) The pop up box should indicate a program dating from the previous 2-3 months or earlier.

Question: We recently upgraded our desktop operating system and now I am getting an error message as soon as I launch Advantage Law software. How can I log on?

Answer: It is important to be sure to get the latest update that contains your support license through its expiration date. Follow these steps below to check:

- 1) Go to www.winvantage.com and log in
- 2) Select "Downloads" from the top navigation
- 3) Select "AdvantageLaw Update"
- 4) Choose "Run" and unzip to install the program
- 5) When you see the "Register" screen, enter your Client ID and the authorization code, both which were sent to you when you began using the program.

Reporting

Question: What is the best report to run when trying to get the total costs and fees billed to date in a particular matter?

Answer: The best report for this is report **bl2**. From the home screen, go to "Reports" and under "Report Group" and choose "Billing" and under "Report Selection" choose "bl2: Billing History". Select the Matter and the date range to see all invoices.

Question: Where would I find, a reporting option that will give me a list of all open files with a certain "Special Bill Interval" such as "I: Immediate"?

Answer: The best report for this requirement is **mf 2e**. To run this report, from the home screen, go to "Reports" and under "Report Group" choose "Master Files" and under "Report Selection" choose "mf 2e: Master List Detailed". In the selectors, choose "Freq", set to = I to select only the bills which are set to "Immediate".

Question: Which report will print my caseload?

Answer: From the home screen, go to "Reports" and under "Report Group" select "Master Files" and from the "Report Selection" choose "mf 2b: Matter Load by Responsible"

Question: What is the best report to show Client ID, Client Name and the hourly rates assigned to this client (fee rate table)?

Answer: The best report to use is **mf 1d** and can be found if you follow these steps from the home screen:

- 1) Select "Reports"
- 2) Under the "Report Group" (on the left side) select "Master Files"

- 3) Under "Report Selection" (on the right side) select "mf 1d: Client List – Override Bill Rates"
- 4) Select the desired Client ID and the date range
- 5) Select "Start (F2)" to view the report

Question: *What is the best way to save my reports and documents as PDFs with my AdvantageLaw program?*

Answer: We recommend our customers use [Adobe Reader](#) or [Black Ice](#) printer driver software.

Software Updates & Licensing

Question: *Where can I find the most current version of AdvantageLaw on my PC and how can I update my version if needed?*

Answer: First you need to determine the version/date of software you currently have installed. From your home screen follow these steps:

- 1) Go to "Help" from the top navigation bar
- 2) Select "About AdvantageLaw" from the drop down menu
- 3) A pop up box will appear with a "revision date"
- 4) If that date is more than 8 weeks old, it is probably time for an update.

To get the latest program follow these steps from your home screen:

- 1) Go to "Help" from the top navigation bar
- 2) Choose "Get Latest Program Update", which will download a self-extracting file containing the most current version
- 3) Select "Run" from your browser to open this file.
- 4) Select "Unzip" from the prompt to copy the new files into place on your PC.
- 5) Exit the program and restart AdvantageLaw.
- 6) After you download the file, this version will install locally on your PC.
- 7) To check that you did successfully install the latest program, choose "Help" from the home screen and select "About AdvantageLaw".
- 8) The pop up box should indicate a program with recent date.

Question: *How do I install AdvantageLaw software for the first time install on a new PC?*

Answer: Please call AdvantageLaw support to help with this process. The exact steps needed depend on the system hardware configuration you have.

Question: *What should I do if I forgot my WinVantage log in and password?*

Answer: Please email support@advantagelaw.com if you forgot your log on credentials and we will send them to you.

Question: *Who do I contact in regards to my annual software support invoice?*

Answer: You can get **Answers** about invoices and payment during the business week and hours by emailing support@advantagelaw.com.

Question: *What will an additional license cost?*

Answer: Typically the charge is \$300, however, we will need to review your company's total number of users and confirm this price on a case by case basis.

Time Keeping

Question: *How do I remove an AdvantageLaw user or timekeeper who has left our firm, but still preserve our historical billing information for that former staff member?*

Answer: Starting from the AdvantageLaw home screen follow these steps:

- 1) Open "Firm Setup"
- 2) Locate the timekeeper in the list
- 3) Deselect the "Active" box for the timekeeper (on the far right column)
- 4) Select "Save"

Question: *How can I eliminate rounding when I am tracking my time in the Time Keeper?*

Answer: From the home screen go to "Utilities" and select "System Options & Custom Dictionary" and browse to Row #30: "Rounding Factor". Uncheck the box to turn off rounding.

Question: *I am trying to authorize an invoice and see this error message, "Not Authorized for the Approval". Is there a way to fix the program so that the message is not showing up?*

Answer: From the home screen select "Utilities" and follow these steps:

- 1) Select "Security Administration" from the drop down menu
- 2) Enter your security password (if you do not know your admin security password, please contact our Help Desk at support@advantage.com or call 303-369-5160)
- 3) Enter the user's initials in the "User ID" field and hit tab
- 4) Scroll down to row 27 called "No Approval of Billing" and uncheck this option
- 5) Repeat these steps for any user who receives this error

Question: *We are increasing our rates January 1st. How do I reassign rates moving forward without affecting past rates prior to January 1st?*

Answer: From the home screen, follow these steps:

- 1) Go to "Billing" then choose "Utilities"
- 2) Select "Billing Utilities" and you will see the "Time and Billing Utilities" screen
- 3) In the list select "Apply New Rates"
- 4) Set the first Date Range box to the date you want the new rates to begin (using 01/01/15 format) and leave other fields blank
- 5) Select "Start (F2) to apply new rates
- 6) You will see a message of how many records were re-rated

Question: *How can I assign new rates on a single Matter or Client ID?*

Answer: To apply new rates, first enter the new rate for each timekeeper and matter in the appropriate fee rate tables. Then, use this utility to apply the rates retroactively to any unbilled time entries in the system with the old rate. Once you complete this first, then from the home screen:

- 1) Go to "Billing"
- 2) Select "Utilities" and "Billing Utilities"
- 3) From the "Time and Billing Utilities" screen, enter following information as needed:
 - Date Range: Start and end dates for time entries
 - Client ID: To restrict processing to one client
 - Staff ID: To restrict processing to one timekeeper
 - Matter ID: To restrict processing to one matter
 - Note: leave all fields blank to apply rates to all unbilled entries
- 4) From the table below, select "Apply New Rates"
- 5) Select "Start (F2)" to change unbilled time entries to reflect new rates as entered in the staff and matter rate tables.

Question: *We hired a new attorney need to set her up to bill hours. What steps do we take?*

Answer: This is a two-step process beginning from the home screen, follow these steps:

- Go to "Firm Set Up" and select "Add New" and enter the new attorney's information and save.
- Next, from the home screen, follow these steps:
 - 6) Go to "Utilities"
 - 7) Select "Security Administration" (you will need your admin password to proceed)
 - 8) Enter the new "User ID" and "Password" fields for the new attorney
 - 9) Choose the desired "User Options" in the grid for the new attorney or choose "Allow All Options" if that is the case and save

Question: *What happens if we have time that was deleted and then we delete the matter too? Can we retrieve deleted time entries?*

Answer: You can add the deleted matter back in under "Client Matters". If you use the same matter ID, it will reconnect to any detailed items, including deleted time entries.

Question: *How do I increase the font size on the time entry screen?*

Answer: Starting from the AdvantageLaw home screen follow these steps:

- 1) Select "Utilities"
- 2) Select "System Options & Custom Dictionary"
- 3) Scroll down to row 31, "Font Size for Time Description text" and check mark the "On/Off" box (on the right side)
- 4) Enter a font size value (i.e., 12, 14) in the "Value" column

- 5) Select "Update"
- 6) The change in font size will appear on the "Detail Time Entry" screen (not the "Daily Time Entry" screen)

Trust Accounting

Question: *How can I start logging Trust Payments?*

Answer: From the home screen, follow these steps:

- 1) Go to "Cash Receipts"
- 2) Choose the desired Bank from drop down menu
- 3) Choose Matter in field below
- 4) Click on the "Trust" button and you will be able to see the balances and history
- 5) Cash receipts can also be thought of as but it is actually cash transactions

Question: *How do we apply a Trust Payment to a bill?*

Answer: Once you have applied a Trust Payment in the "Cash Receipts" or "Accounts Payable" screen follow these steps:

- 1) Go to the "Billing screen"
- 2) Select "Trust Transfer " at the top right of the navigation bar
- 3) Create a Payable Trust record and this will posts a receipt

Question: *How do I transfer trust money from one matter to another matter?*

Answer: From the home screen, follow these steps:

- 1) From Main Screen, click "Trust Accounts"
- 2) Enter the first matter
- 3) Type in a new line with the negative amount to withdraw money from the trust account
- 4) Choose "Utilities" and "Update Trust Detail"
- 5) Do the same as a positive entry for the 2nd matter (see screen shot below)

	Date	Type	Amount	Vendor	Vouch No	Check No	Bank	Description	Run Total
1	2/27/2015	Trust Rcpt	13500.00		0		3	Trust deposit : 2015 projects	13500.00
2	5/12		-13500				3	Manual entry to transfer money to 01454.0002	
3									

Vendors

Question: *I would like to set up a new vendor and use my own numbering system, not the one in the program. How can I add new Vendor with own number?*

Answer: You will need to disable the auto numbering system by following these steps:

- 1) From the home screen, go to "Utilities"
- 2) Select "System Options & Custom Dictionary" from drop down menu
- 3) Go to Row # 113 "Auto-numbering of Vendor IDs"
- 4) Uncheck the box to deactivate this feature

Question: *How can I print a report of ALL my Vendor 1099s for the year?*

Answer: From the home screen, follow these steps:

- Select "Checks"

- From “Go To”, select “1099 Printing” and select “Start” to get a list of vendor totals for 1099 printing.
- You may also print the 1099s on standard 1099 forms from this screen

Question: *I'm ready to print my vendors' 1099s, but what forms do I buy & how do I print them?*

Answer: You may order 1099 forms on line from several sources. AdvantageLaw uses [Nelco Solutions](#). Once you receive your forms, follow these steps from the home screen:

- Select “Checks”
- From “Go To”, select “1099 Printing”