Juris®
User Guide

Version 3.2

LexisNexis®

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TOC

Copyright and Trademark **5**
Login and Password Assistance **6**
Sign into Juris 6
Sign out of Juris 7
Change your password 8
Set up accounting Fees and Schedules **11**
Create a Fee Schedule 11
Create a Financial Statement Layout 16
Set up client information **19**
Create a Client 19
Create a Matter 30
Change the Office Code of a client and matter 42
Assign a Practice Class to a client 44
Assign a Note Card to a Matter 46
Time entry and tracking **48**
Assign a mandatory task code to a client and matter 48
Edit a Task Code 52
Create a Timekeeper 53
Create a Time Entry batch 57
Edit a Posted and Unbilled Time Entry 58
Record a Time Entry 59
Post a time entry 61
Set a timekeeper as active or inactive 64
Timekeeper tab 66
Maximum number of originating Timekeepers 66
Allow originating Timekeepers to be changed? 66
Enter originating Timekeepers on which form? 66

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Enter billing Timekeeper on which form? 67
Bank Accounts 68
Review a Bank Account 68
Review a checkbook 69
Reconciling a Bank Account 71
Export Items to Excel 76
Manage payments for vendors 77
Create a new Schedule 77
Create a voucher template 79
Create a journal entry template 81
Record a voucher for payment 83
Record a journal entry 86
Expense entry and tracking 88
Setup an Expense Schedule 88
Record an expense 91
Post the expense entry batch 93
Using Attachments 93
About Support File Formats 93
Using Expense Attachments 93
Using Payment Voucher (Expense Distributions) Attachments 95
Deleting Attachments 97
Set up and generate bills 98
Select and distribute prebills 98
Edit a Prebill 100
Change the order of fee and expense items in a prebill 110
Use Find to search for prebill information 112
Use Replace to search and replace information in a prebill 113
Spell check a prebill 114
Export and email bills 115

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Matter/Consolidation setup for exporting or email bills 127
Billing Address setup for E-mailing Bills 131
Print a Bill 133
Post a Bill 143
Configure the Billing tab 148
Enter billing thresholds on which form? 148
Enter the default threshold for expenses. 148
Enter the default threshold for fees. 148
After posting a Flat Fee Bill: 149
Change Billing Frequency to 149
Change Billing Agreement to 149
Expense Attachment Printing Options 149
Online Payments 150
Reports 151
Preview Reports (View and Print) 151
User report rights - assign/remove 153
Custom fields 157
Use a text code 157
User Menu Rights - assign/remove 158
Common functions and shortcuts lists 161
Common Functions 161
Shortcuts 162
Glossary 164

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Revision Date

LexisNexis
1801 Varsity Drive
Raleigh, NC 27606

North America: (800) 387-9785
Outside North America: (919) 467-1221
Fax: (919) 467-7181

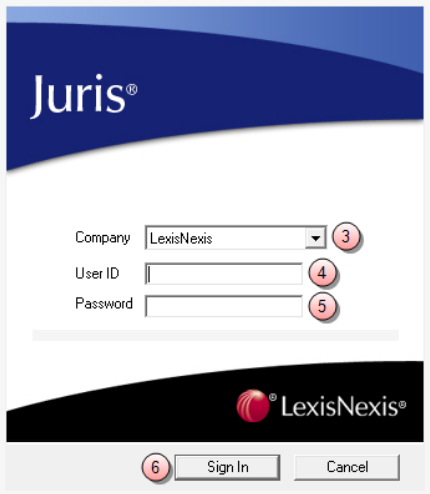
http://www.juris.com

Login and Password Assistance

Sign into Juris

To sign into Juris:

1. Click the Windows **Start** button.
2. Select **All Programs** > **Juris** > **Juris** to open the login window.



3. Click the **Company** arrow and select the company database in which you want to work.

> **NOTE:** The Company box is only visible if your firm has multiple databases to which Juris is connected. If you do not see the Company box, skip step 3.

4. In the **User ID** box, type the name you use to sign into Juris.
5. In the **Password** box, type your Juris password.
6. Click **Sign In**.

   The Juris main window opens.

> **NOTE:** If Juris does not allow you to sign in, contact your system manager or administrator.

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Sign out of Juris

To sign out of Juris do **one** of the following:

- Select **Form** > **Exit** from the menu.
- Click the **Close** button in the top right-hand corner of the window.

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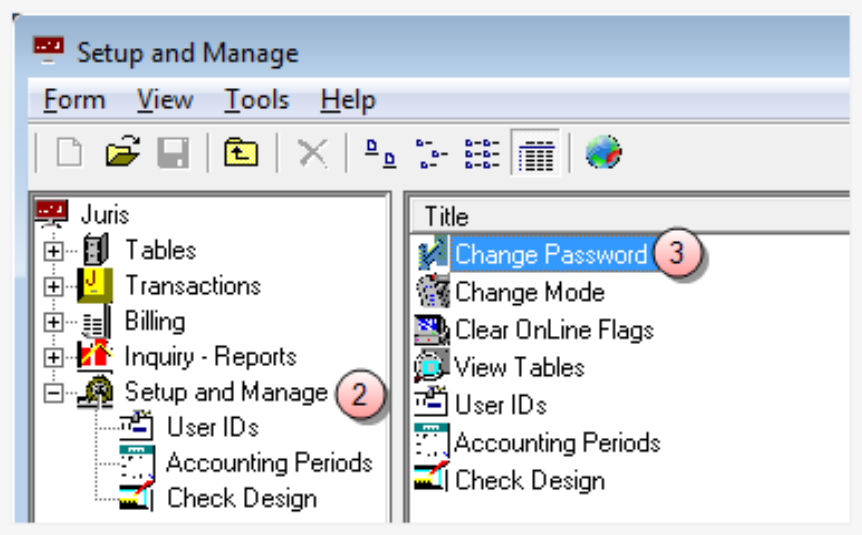
Change your password

The Change Password feature lets you change your Juris login password. The password can be up to 6 characters in length and is case-sensitive.

> **NOTE:** You must have access to the password function in Juris to change your password. If you do not, contact your system manager or administrator.

To change your password:

1. Start **Juris** and log in to open the main Juris window.



2. Double-click **Setup and Manager** to expand the folder.
3. Double-click **Change Password**.

   The Setup and Manage\Change Password window opens.

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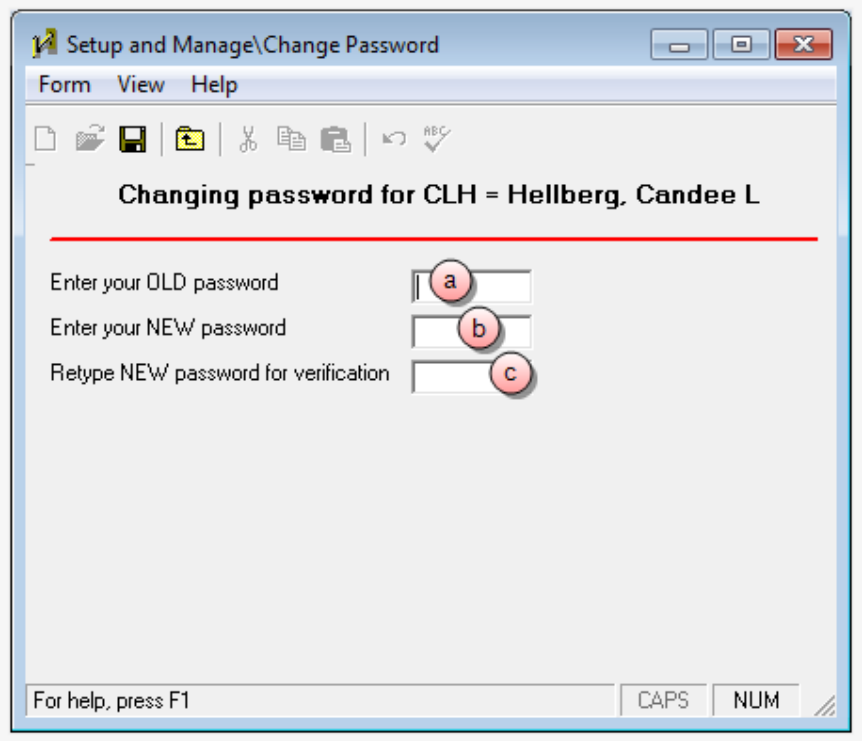
If Mobile Web Access is turned off at the Firm level (Firm Options), follow these steps.



a. In the **Enter your OLD password** box, type your current password.

b. In the **Enter your NEW password** box, type the new password you want to use.

c. In the **Retype NEW password for verification** box, re-type the new password again.

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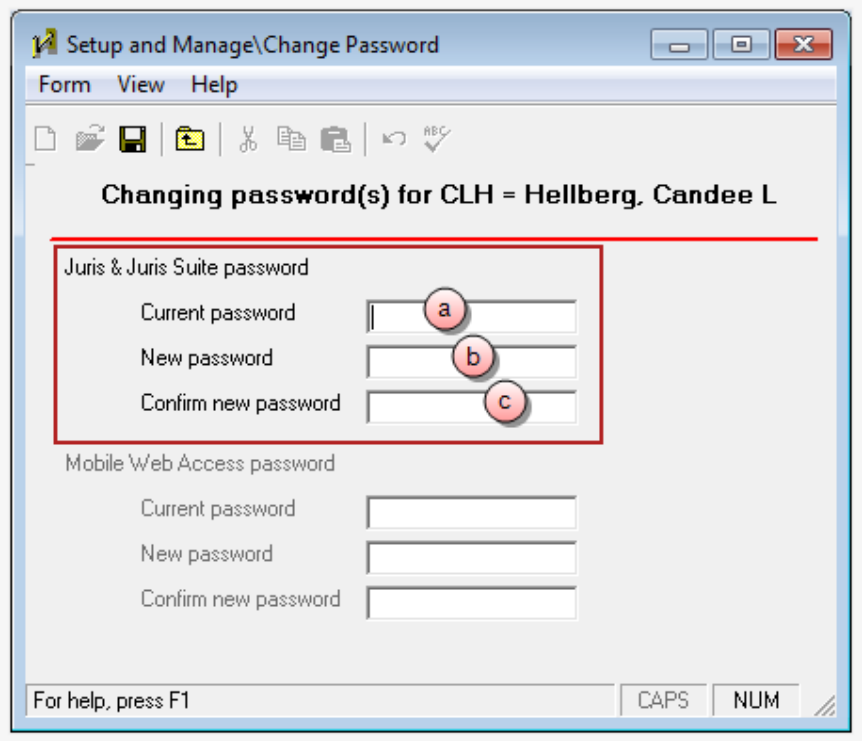
If Mobile Web Access is turned on at the Firm level (Firm Options), follow these steps



Perform steps a through c in the *Juris & Juris Suite password* area of the window.

a. In the **Current password** box, type your current password.

b. In the **New password** box, type the new password you want to use.

c. In the **Confirm new password** box, re-type the new password again.

4. Click the **Save** button to save your change.

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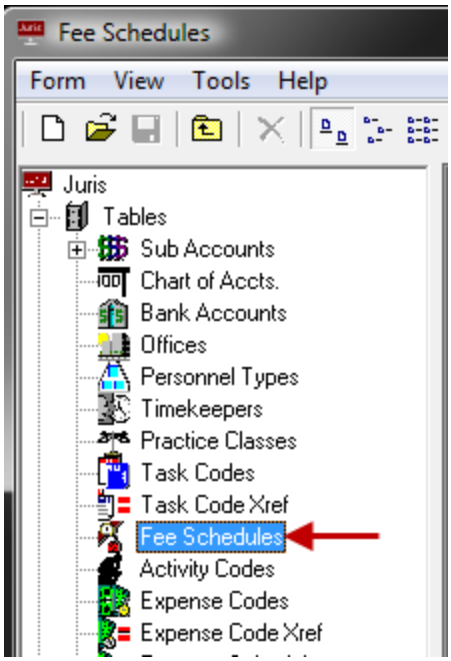
Set up accounting Fees and Schedules

Fee schedules are used to establish specific fees that differ from the standard fees charged by a firm.

Create a Fee Schedule

To create a Fee Schedule:

1. Select **Tables** > **Fee Schedules**.



2. Open a new Fee Schedule form by using any of the following options:
   - Click the **New** icon on the toolbar.
   - Select **Form** > **New** from the menu.
   - Use the keystroke shortcut **Ctrl + N**.

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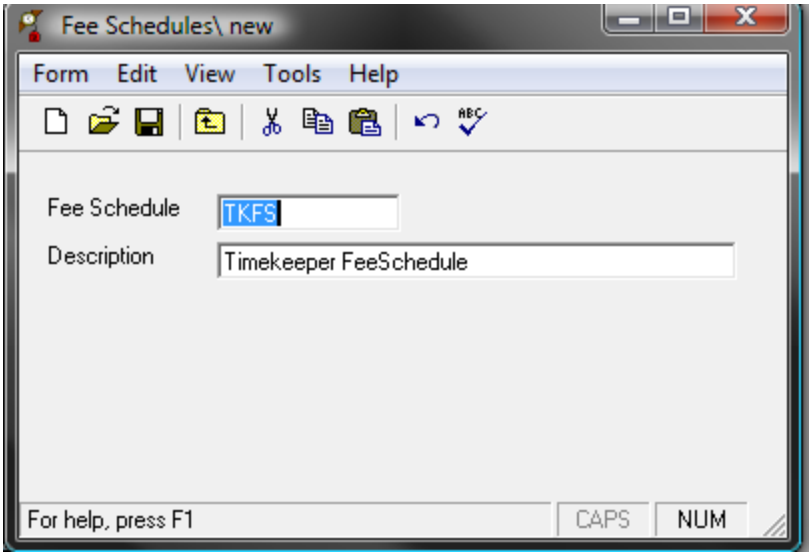

3. In the **Fee Schedule** text box, type a 1-4 character code.
4. In the **Description** text box, type a 1-99 character description.
5. **Spell check** the form using any of the following options:
   - Click the **Spell Check** icon on the toolbar.
   - Select **Form** > **Spelling** from the menu.
   - Use the keystroke shortcut **F7**.
6. **Save** the schedule using any of the following options:
   - Click the **Save** icon on the toolbar.
   - Select **Form** > **Save** from the menu.
   - Use the keystroke shortcut **Ctrl + S**.
7. Once the Fee Schedule is saved, the Timekeepers, Personnel Types and Task Codes icons become enabled.

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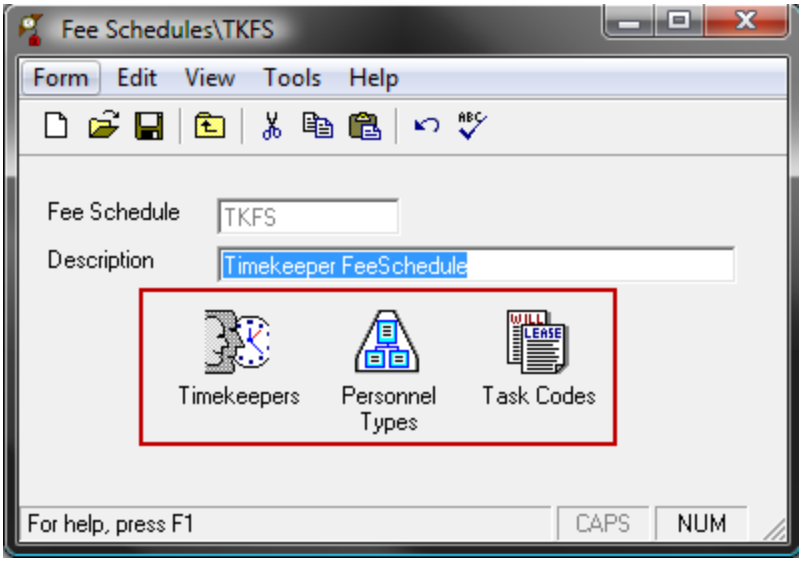
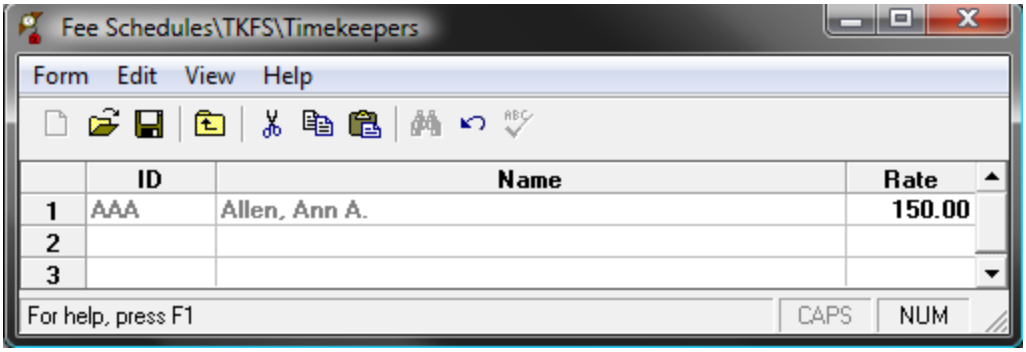


The Fee Schedule might be set up to use Timekeepers, Personnel Types or Task Codes.

8. Click on the appropriate title below for steps, if the fee schedule has been setup with any of the following.

Timekeepers

1. Click the **Timekeepers** icon to open the timekeeper details.



2. In the **ID** column, type the Timekeeper's ID.
3. In the **Rate** column, type the rate for the Timekeeper.
4. Click the **Save** icon on the toolbar to save your additions.

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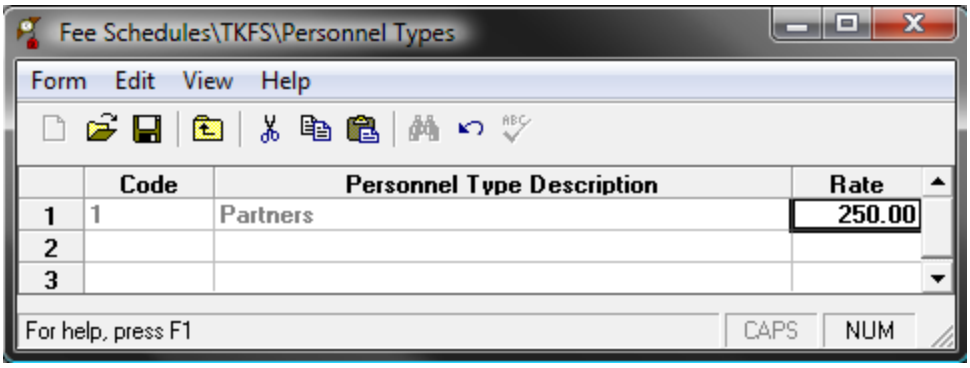
Personnel Types

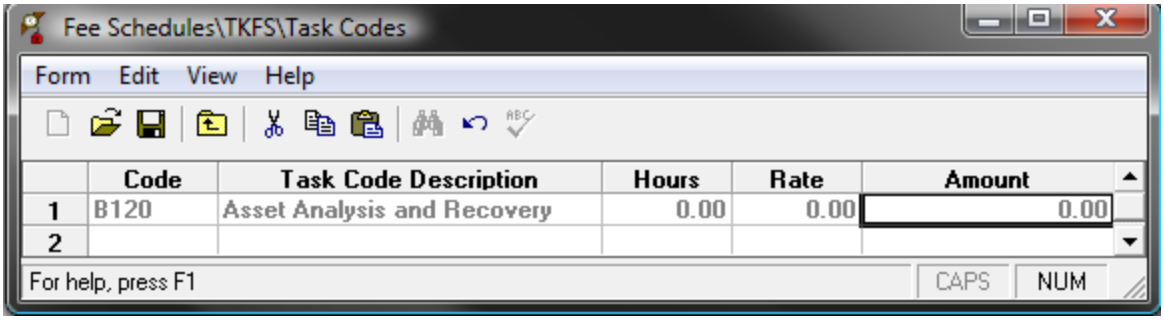
1. Click the **Personnel Types** icon to open the Personnel Types details.



2. Enter a Personnel Type **Code** into the schedule in either of the following ways:
   - Use the **Lookup** icon on the toolbar to select a Personnel Type from a list of available Personnel Types.
   - In the **Code** Column, type the Personnel Type code.
3. In the **Rate** column, type a rate to be used for this particular code.
4. Click the **Save** icon on the toolbar to save your additions.

Task Codes

1. Click the **Task Codes** icon to open the Task Code details.



2. Enter a Task Code into the schedule in either of the following ways:
   - Click the **Lookup** icon on the toolbar to select a Task Code from the list of available Task Codes.
   - In the **Code** column, type the Task Codes code.

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3. In the **Rate** column, type a rate for this particular code.
4. Click the **Save** icon on the toolbar to save your addition.

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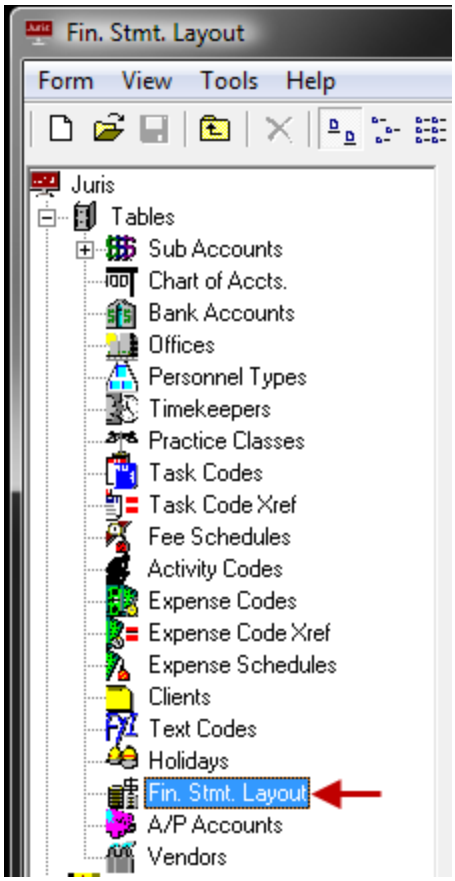
Create a Financial Statement Layout

To create a financial statement layout:

1. Select **Tables** > **Fin.Stmt. Layout**.



2. Open a new **Financial Statement Layout** form by using any of the following options:
   - Click the **New** icon on the toolbar.
   - Select **Form** > **New** from the menu.
   - Use the keystroke shortcut **Ctrl + N**.

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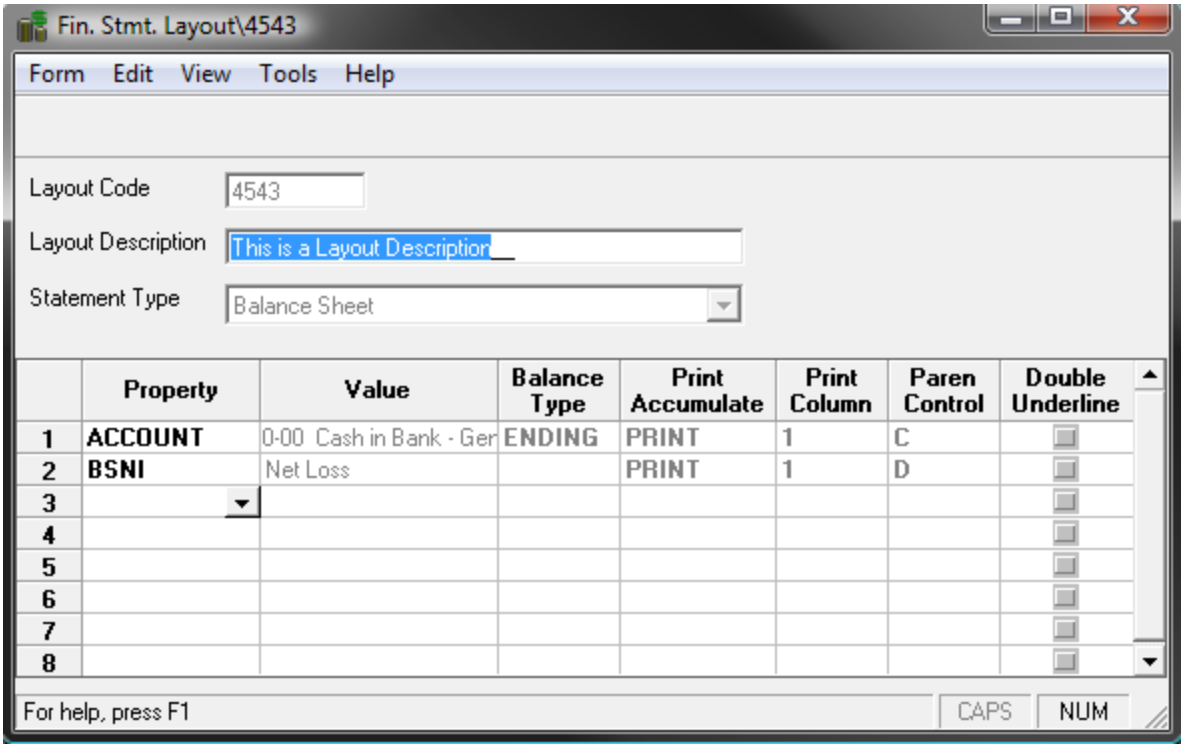

3. In the **Layout Code** text box, type a 1-4 character code.

   This code can be digits, letters, or a combination of both.

4. In the **Layout Description** text box, type a 1-99 character description.
5. Click the **Statement Type** arrow and select an option for the type of layout. Options are:
   - Balance Sheet
   - Profit and Loss Statement
   - Cash Flow Statement
   - Supporting Schedule (Profit & Loss Format)
   - Supporting Schedule (Balance Sheet Format)
6. Use the spreadsheet to define the information to be included on the statement.
   - ACCOUNT - Allows the selection and formatting of Accounts.
   - TEXT - Allows selection and formatting of Text Codes.
   - LITERAL - Allows entry and formatting of free text (i.e., literals).

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- LF (Line Feed) - Forces a blank line in a statement.
- FF (Form Feed) - Forces a new page in statement.
- BSNI - Calculates Balance Sheet Net Income or Loss.
- PAT - Print Accumulated Totals. Used in conjunction with Account when account values are 'accumulated' for later printing using this property.
- SUB1 - SUB9 - Allows creation of sub-total breaks 1-9.
- CLR1 - CLR9 - Allows clearing of sub-total breaks 1-9.
- LEGEND - Prints predefined Legend depending on Statement Type being defined. Used to underline numeric (number) columns. Typically used with statement sub-totals and grand totals.
- UNDRLN - Allows creation of underlines in blank column/rows.
- SR/ER - Start Ratio/End Ratio: Used with Profit and Loss Statement Types only.

7. **Spell Check** using any of the following options:
   - Click the **Spell Check** icon on the toolbar.
   - Select **Form** > **Spelling** from the menu.
   - Use the keystroke shortcut **F7.**
8. **Save** the layout using any of the following options:
   - Click the **Save** icon on the toolbar.
   - Select **Form** > **Save** from the menu.
   - Use the keystroke shortcut **Ctrl + S**.

NOTE: The layout can only be printed via the Reports Queue.

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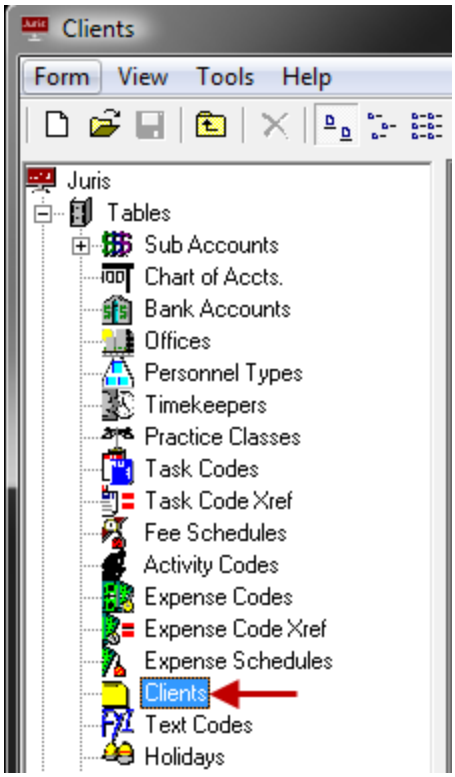
Set up client information

Fee schedules are used to establish specific fees that differ from the standard fees charged by a firm.

Create a Client

1. Select **Tables** > **Client.**



2. Open the **Client** form by using any of the following options:
   - Click the **New** icon.
   - Select **Form** > **New** from the menu..
   - Use the keystroke shortcut **Ctrl + N**.

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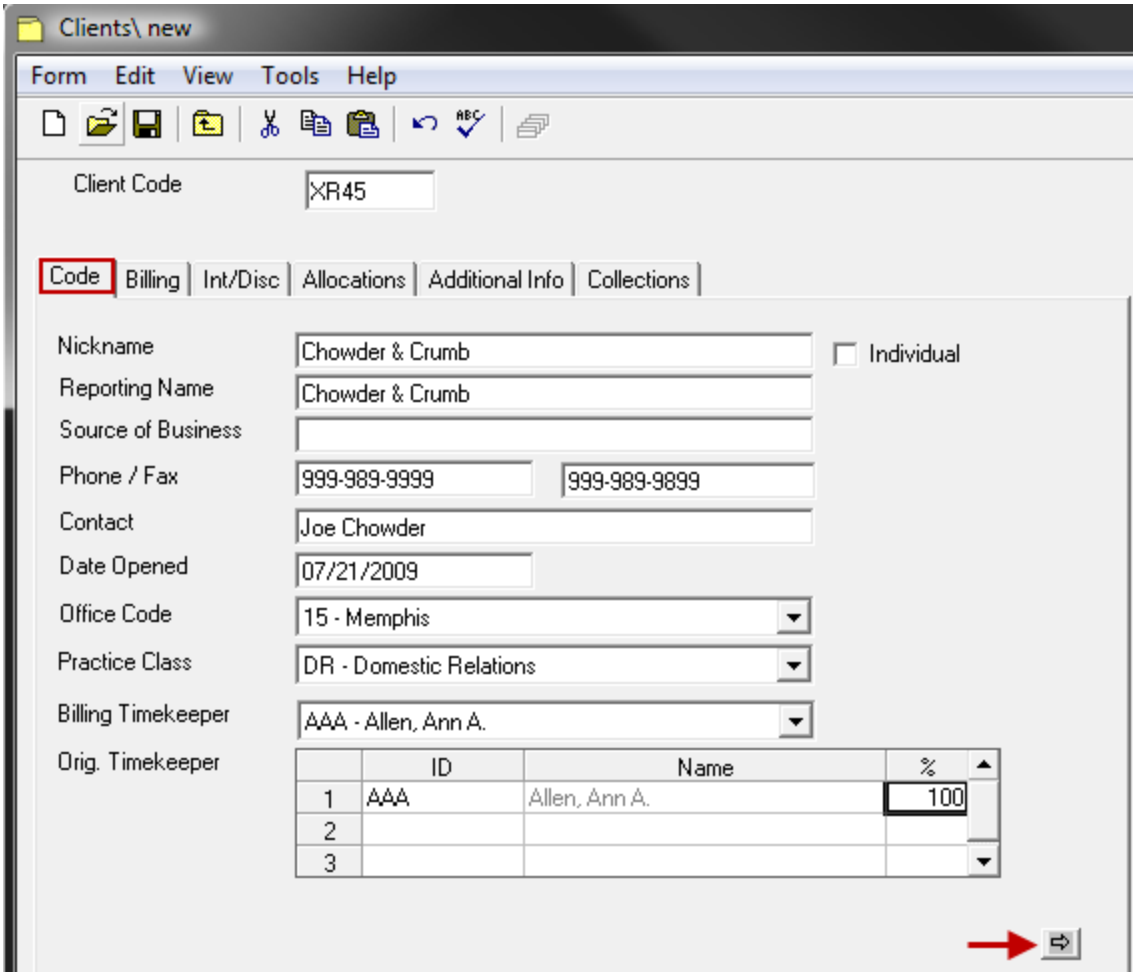

NOTE: You can click on a tab or use the arrow button located at the bottom of the form to move in a sequential order.

3. Enter a **Client Code**.
4. Fill out the items on the **Code** tab:
   - Enter 1-99 character **Client Nickname**.
   - Enter 1-99 character **Reporting Name**. Defaults from Client Nickname but may be edited.
   - Enter 1-99 character **Source of Business**.
   - Enter 1-20 character **Phone/Fax Numbers**.
   - Enter 1-99 character **Contact**.

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- Enter or accept **Date Opened**. Default will be current **System Date**.
- Enter or select valid **Office Code**.
- Enter or select valid **Billing Timekeeper** .
- Enter or select valid **Practice Class Code**.
- Select whether the **Client** is an **Individual** (if unselected, will assume **Client** is an organization).
- Enter or select valid **Originating Timekeeper(s)** and percentage(s). At least one Originating Timekeeper is required. Number of Timekeepers allowed is 1-5 as determined in Firm Options.

5. Fill out the items on the **Billing** tab:

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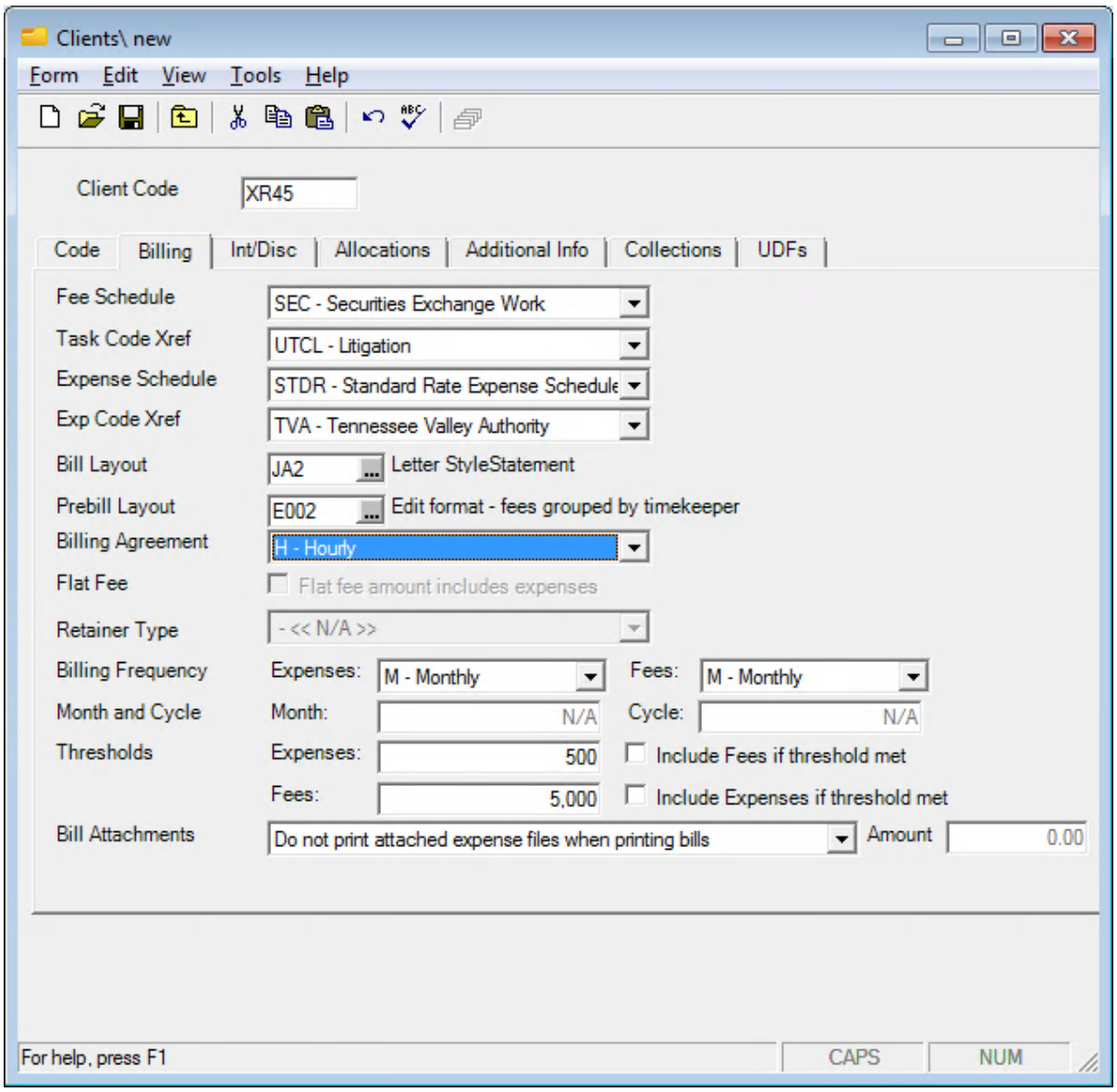

TIP: View Billing Agreements and Billing Frequencies for detailed information and setup configurations.

- Enter or select **Fee Schedule Code**. The Fee Schedule assigned to the Client will determine the timekeeper rates used.
- Enter or select **TaskCode** and **Xref Code** (cross reference code), if applicable.
- Enter or select **ExpenseScheduleCode**. The expense schedule assigned to the Client will determine the amounts charged for expenses.

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- Enter or select **Expense Code Xref Code**, if applicable.
- Enter or select **Bill Format Code** and **Prebill Format Code** to be used for billing for this client.
- Enter or select **Billing Agreement Code**.
- If **Flat Fee Billing Agreement**, check box if **Flat Fee Amount Includes Expenses**. Any action to be made on the billing agreement after posting a **Flat Fee Bill** is determined in Firm Options.
- If the Retainer Type is Billing Agreement, enter or select **Retainer Type**.
- Enter or select **Billing Frequency for Expenses/Fees**. Any action to be made on the billing frequency after posting a Flat Fee Bill is determined in Firm Options.
- If **Billing Frequency** is **(Q)uarterly, (S)emiannually or (A)nnually**, enter **BillingMonth**.
- If **Billing Frequency(C)ycle**, enter Cycle 1-999.
- Enter **Billing Thresholds** for Expenses/Fees. Threshold defaults will be established in Firm Options. Threshold billing is activated when Prebills are printed By Frequency. When posted fee or expenses reach or exceed thresholds, the prebill will be generated even if it falls outside established Billing Frequencies for that item. If the prebill prints only because the Fee Threshold was met, then only fees will print. If it prints because the Expense Threshold was met, then only expenses will print.
- Using the **Bill Attachments** drop-down list, specify if existing attachments will be included when printing bills for this client. The following options are available:
  - **Print attached expense files when printing bills**. All expense attachments are included when printing bills, if present.
  - **Do not print attached expense files when printing bills**. No expense attachments are ever printed with bills.
  - **Print attached expense files when printing bills for expenses over $**. Allows you to specify a dollar amount (in the text box to the right of the option). When a bill is over this amount, any expense attachments are included when printing bills.

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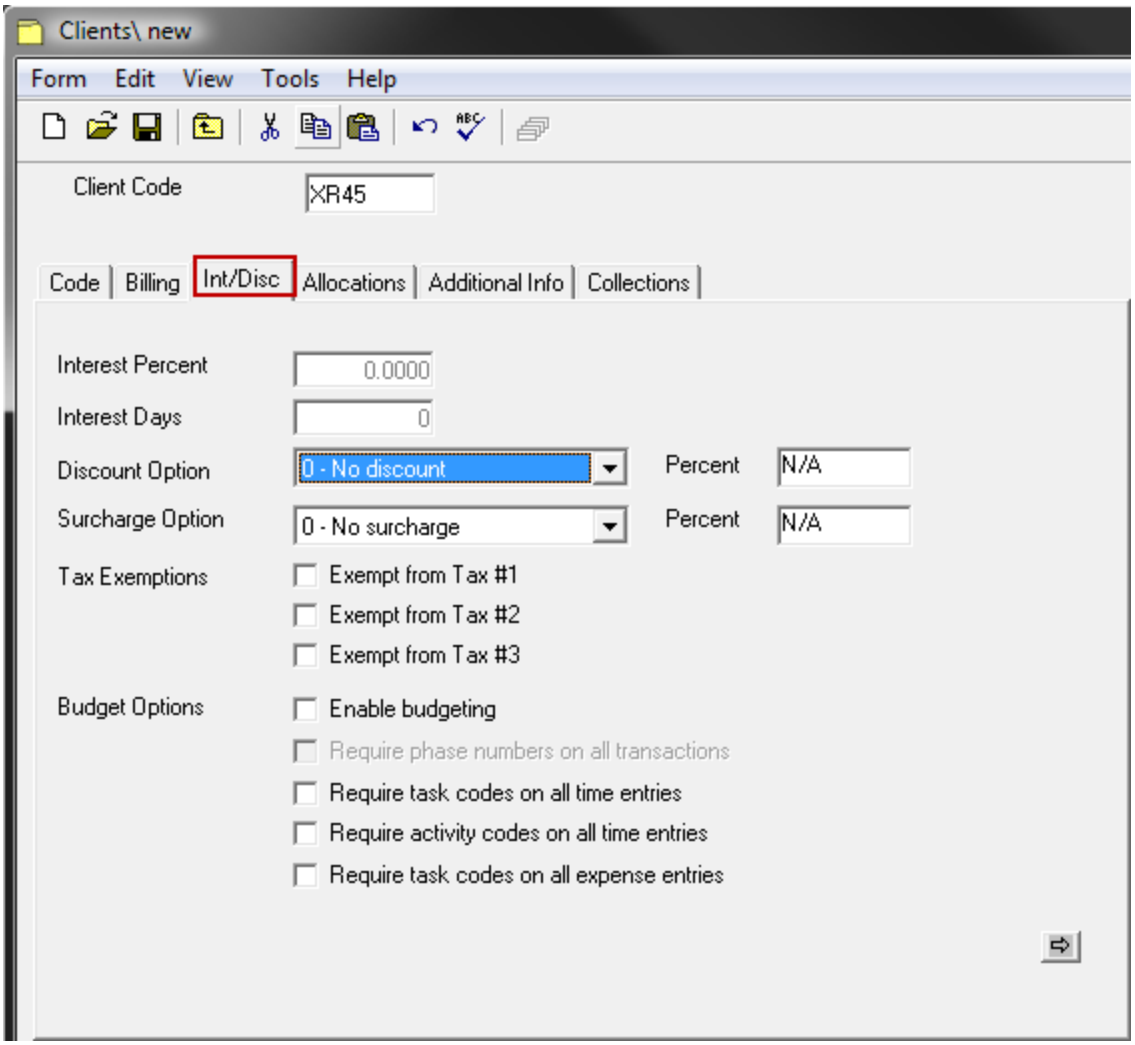
> **TIP:** You can specify this setting's default option, which is always used for new clients, at the firm level of Juris. For more information, see Configure the Billing tab.

- The check box labeled **Enable Online Payments** will be selected automatically. To disable online payments for a client, deselect this check box.

6. Optionally, complete the items on the **INT/DISC** tab.



- Enter **Interest Percent** (0.0000-100.0000%), if applicable.
- Enter **Interest Days** 1-365, which is the number of days in the grace period before interest will begin to accrue on past due balances.
- Enter or select **Discount Option** and **Percent** (0.0000-100.0000%), if applicable.
- Enter or select **Surcharge Option** and **Percent** (0.0000-100.0000%), if applicable.

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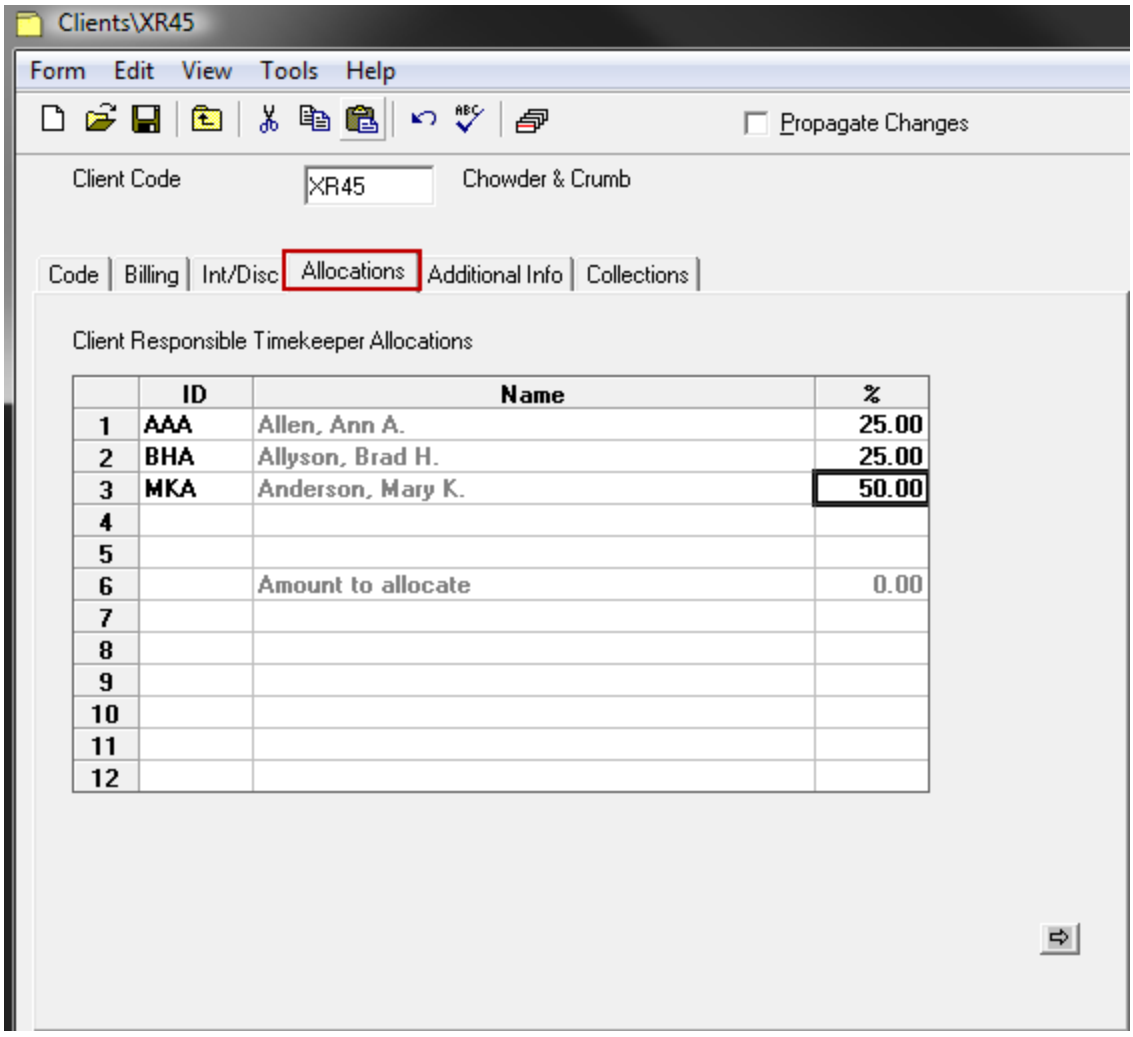
> **NOTE:** Defaults and ability to change Interest, Surcharge and Discount are determined by settings in Firm Options.

- Check **Tax Exemption** options, if applicable.
- Check box to **Enable Budgeting**, if applicable.
- If **Enable Budgeting** is selected, check box to **Require Phase Numbers** on all **Transactions**, if applicable.
- Check box to **Require Task Codes** on all Time Entries, if applicable.
- Check box to **Require Activity Codes** on all Time Entries, if applicable.
- Check box to **Require Task Codes** on all Expenses, if applicable.

7. Optionally, complete the **Allocations** tab.



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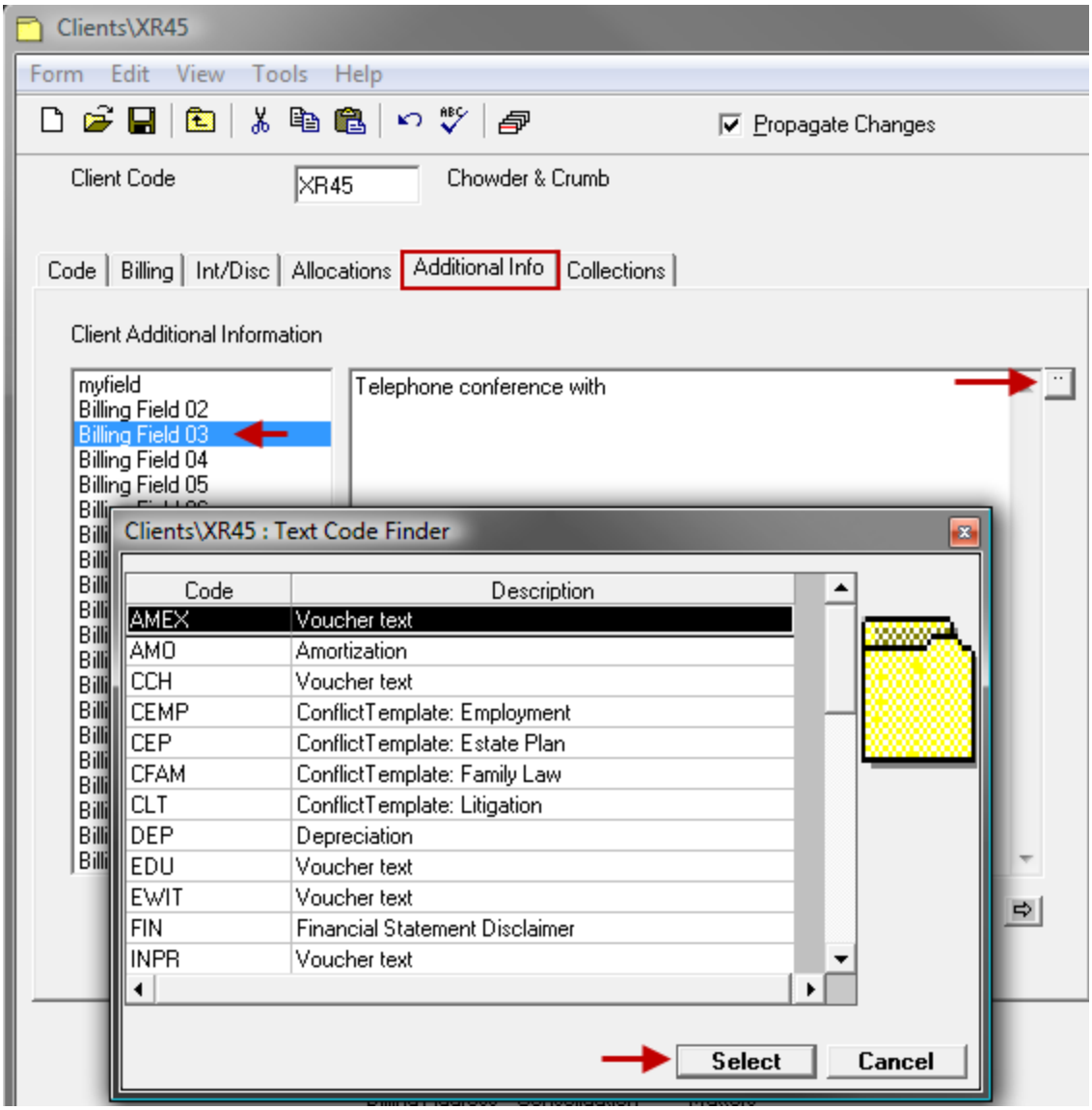
- Select an **ID**.
- Enter a **percentage**. Each new line will automatically populate the percentage field with a value that adds up to 100 percent.

8. Optionally, complete the **Additional Info** tab.



- Select a filed in the left column.
- Click the **ellipses** button to bring up the **Text Codes** for selection.
- Progress through each of the applicable fields, each time using the **ellipses** button to select a **Text Code**.

9. Optionally, complete the **Collections** tab.

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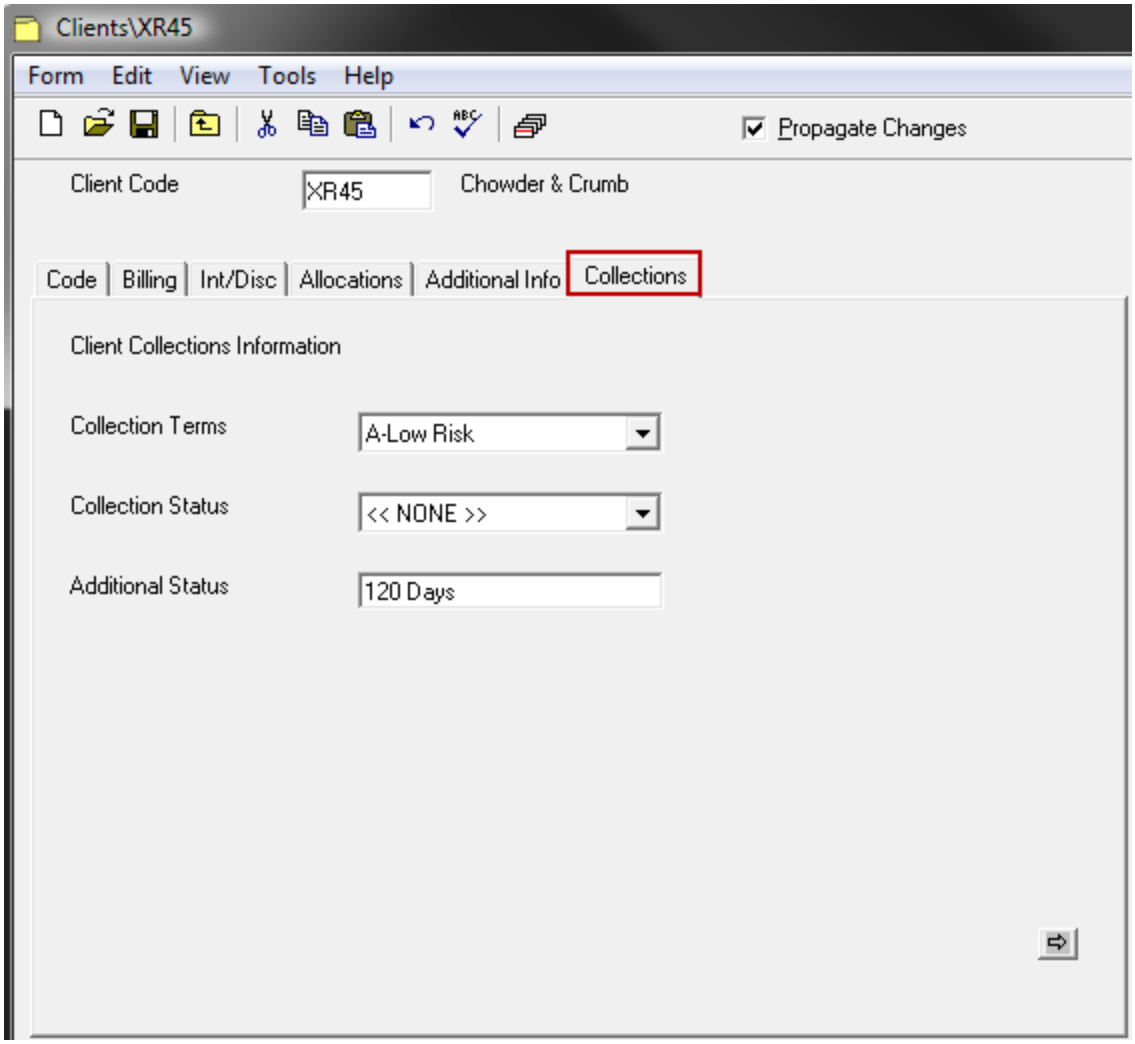

- Select **Collection Terms**.
- Select **Collection Status**.
- Enter **Additional Status** if appropriate.

10. **Spell Check** the form using any of the following options:
    - Click the **Spell Check** icon.
    - Select **Form** > **Spelling** from the toolbar.
    - Use the keystroke shortcut **F7.**
11. **Save** the **Client** using any of the following options:

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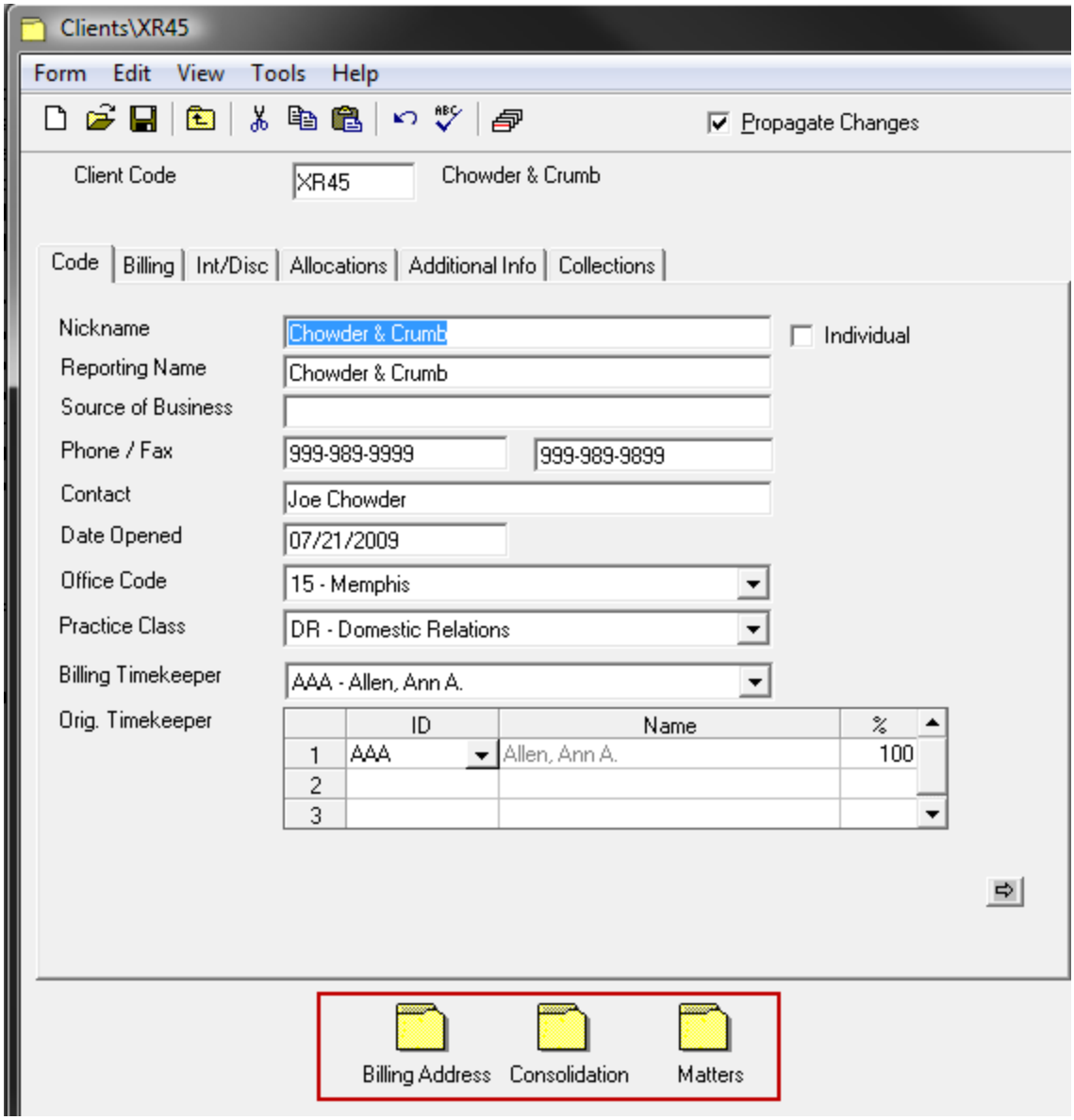
- Click the **Save** icon.
- Select **Form** > **Save** from the toolbar.
- Use the keystroke shortcut **Ctrl + S**.

12. The **Billing Address**, **Consolidation** and **Matters** options will become available after the Client is saved.



13. Select the **Billing Address** option to enter a Billing Address. Select the **Consolidation** option to create a Consolidation, if applicable. Select the **Matters** option to create a Matter for the client.

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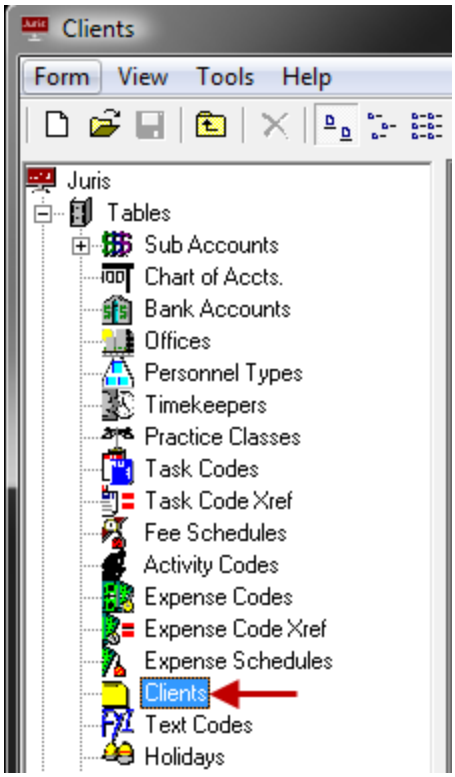
Create a Matter

To create a Matter:

1. Select **Tables** > **Clients**.



2. Open a **Client** record.

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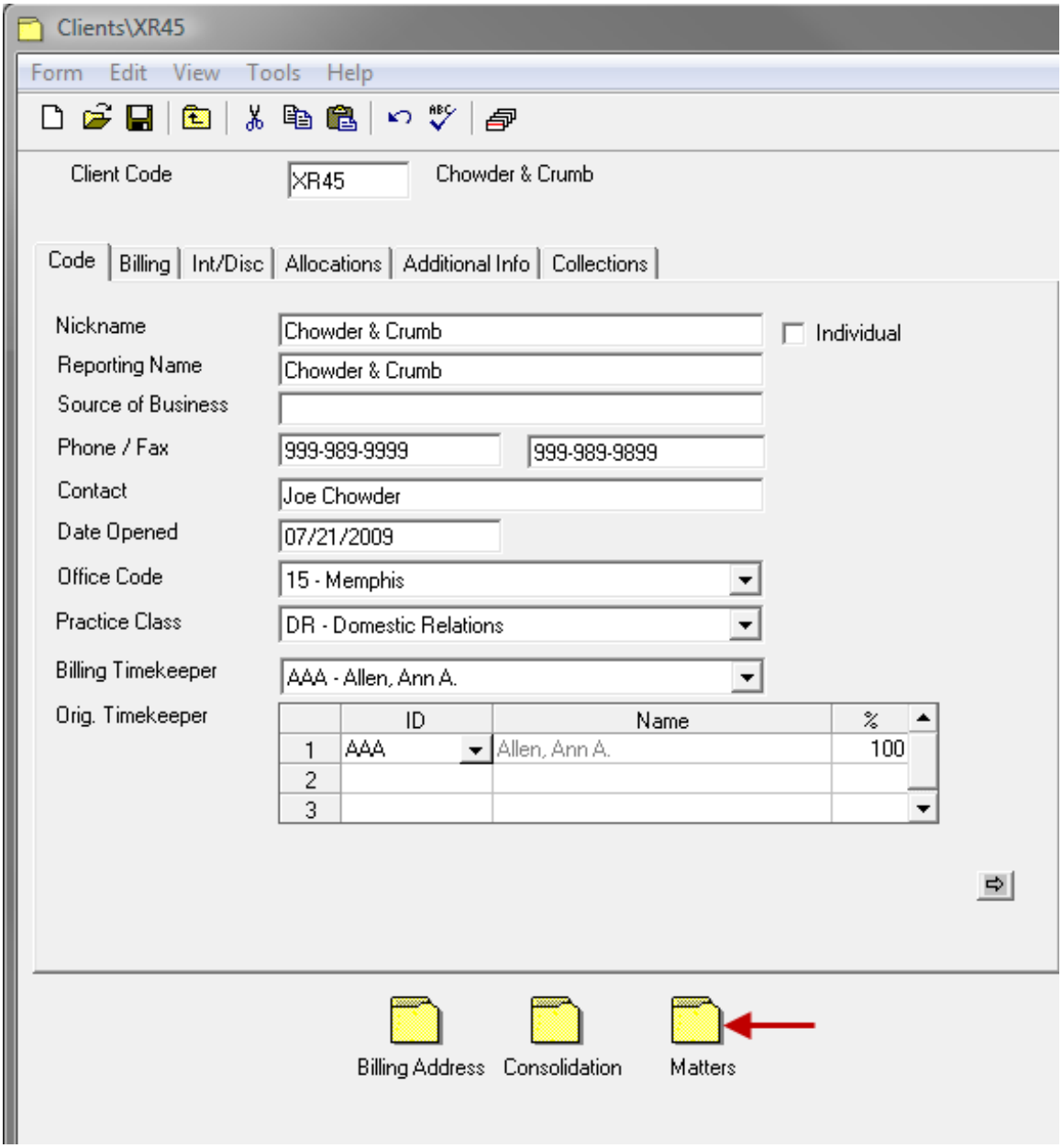

3. Double click on the **Matters** folder icon.
4. Open the **Matter** form by using any of the following options:
   - Click the **New** icon.
   - Select **Form** > **New** from the menu.
   - Use the keystroke shortcut **Ctrl + N**.
5. Enter a **Matter Code**.

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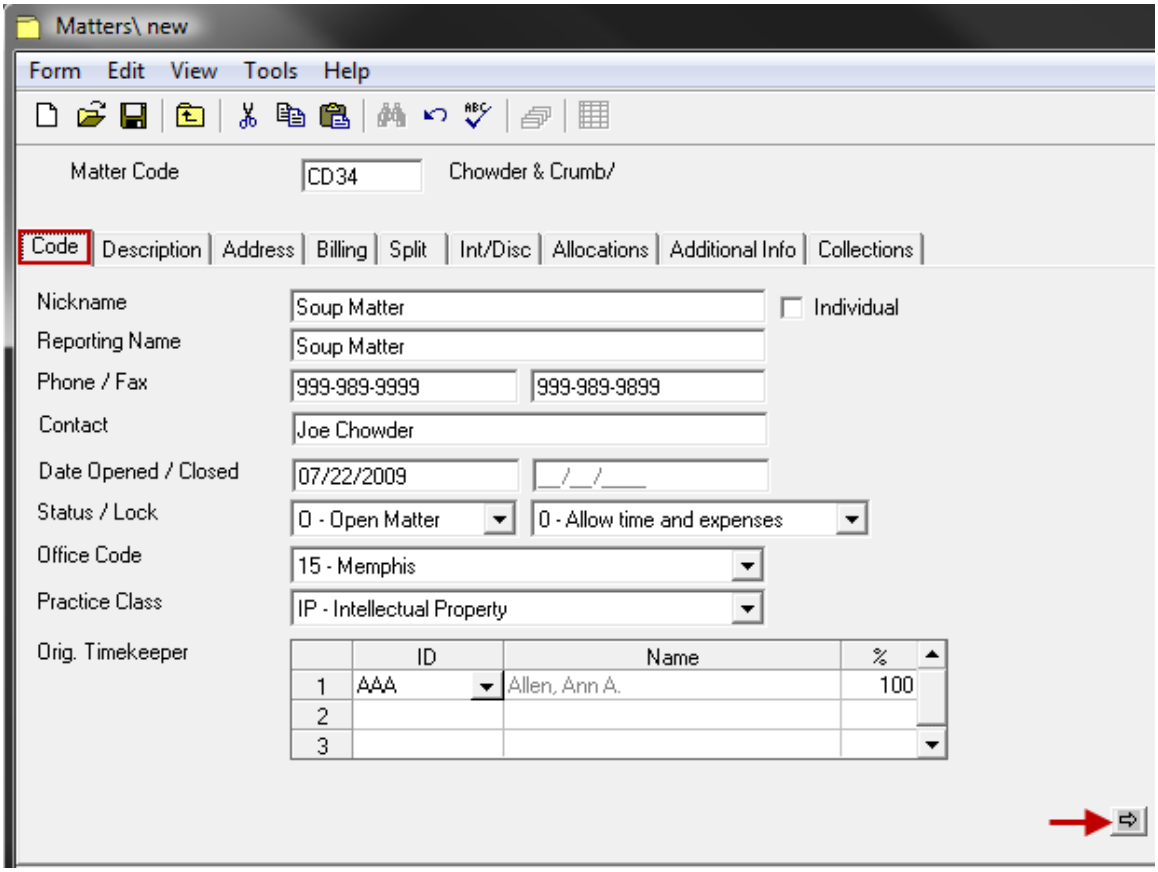
6. Many of the default values supplied on the following tabs are pulled from the selections made on the related Client form. These defaults may be changed to any valid value as applicable to the individual Matter.
7. Fill out the items on the **Code** tab.



- Enter 1-99 character **Matter Nickname**.
- Enter 1-99 alphanumeric **Reporting Name**. Default from **Matter Nickname** but may be edited.
- Enter 1-99 character **Source of Business**.
- Enter 1-20 character **Phone/Fax Numbers**.
- Enter 1-99 character **Contact**.
- Enter or accept **Date Opened**. Default will be current **System Date**.
- Status and **Lock** options can be used to limit the ability of users to enter new transactions for the **Matter**.

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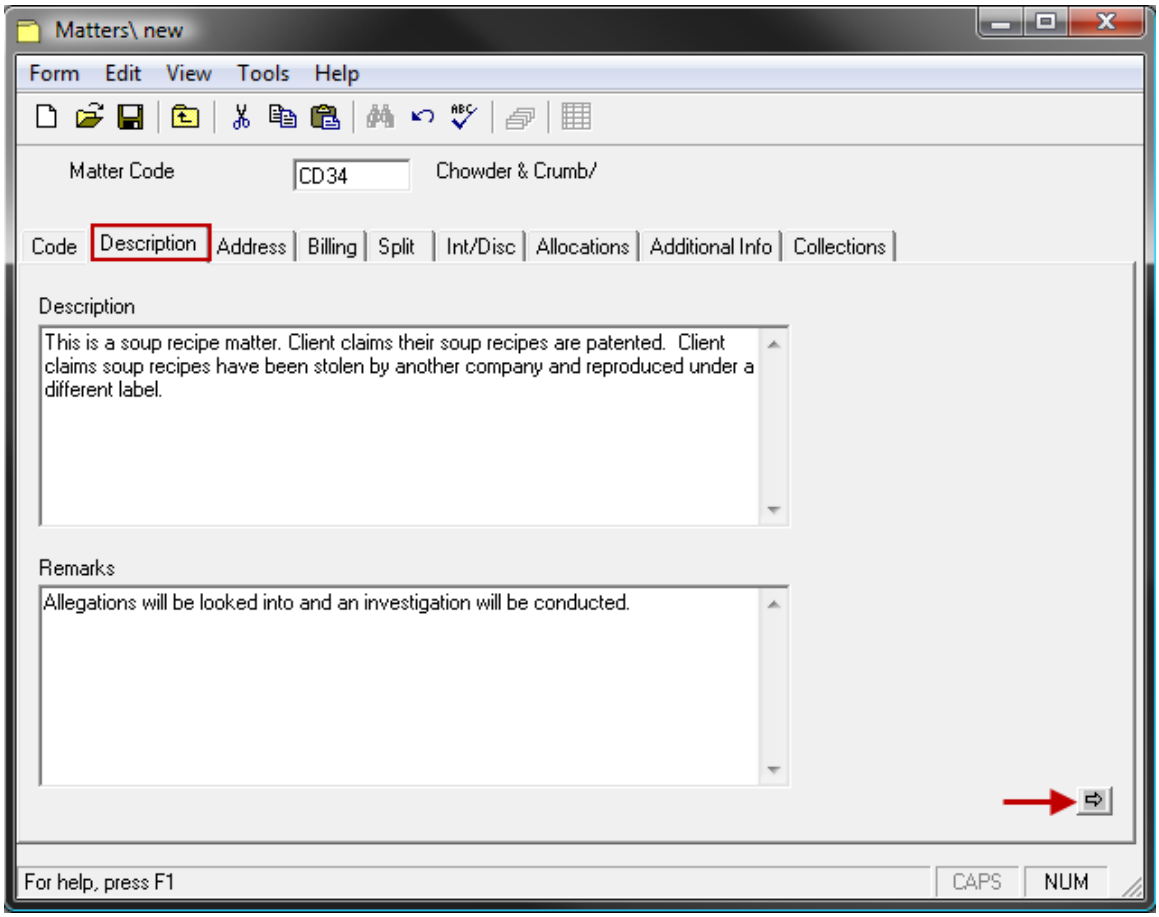
- Enter or select valid **Office Code**.
- Enter or select valid **Practice Class Code**.
- Select whether the **Matter** is an **Individual** (if unselected, will assume Matter is an organization).
- Enter or select valid **Originating Timekeeper**(s) and **percentage**(s). At least one Originating Timekeeper is required. Number of Timekeepers allowed is 1-5 as determined in Firm Options.

8. Fill out the items on the **Description** tab.



The **Matter Description** or **Matter Remarks** fields each allow a large amount of text, and these fields may be placed in the bill's design. To enter a carriage return in either field, use **Ctrl + Enter**. To enter a tab use **Ctrl + Tab**.

9. Fill out the items on the **Address** tab.

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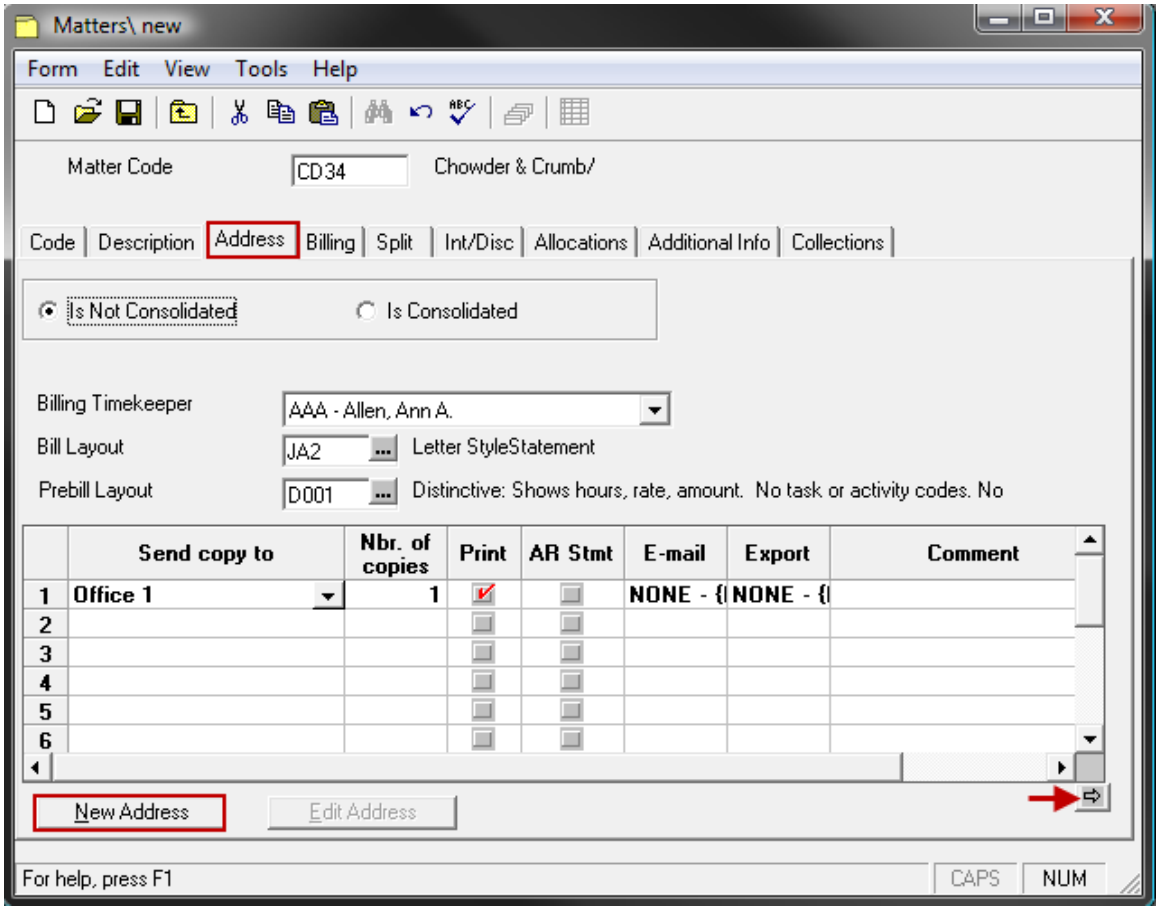

NOTE: If the Matter is NOT to be Consolidated, then a billing timekeeper, prebill format, bill format assignments, and billing address information must be entered here. If the Matter IS CONSOLIDATED, then the Consolidation must be selected here. (The must be established before the Matter can be added to the Consolidation.) See Consolidation for more information.

10. Fill out the items on the **Billing** tab.

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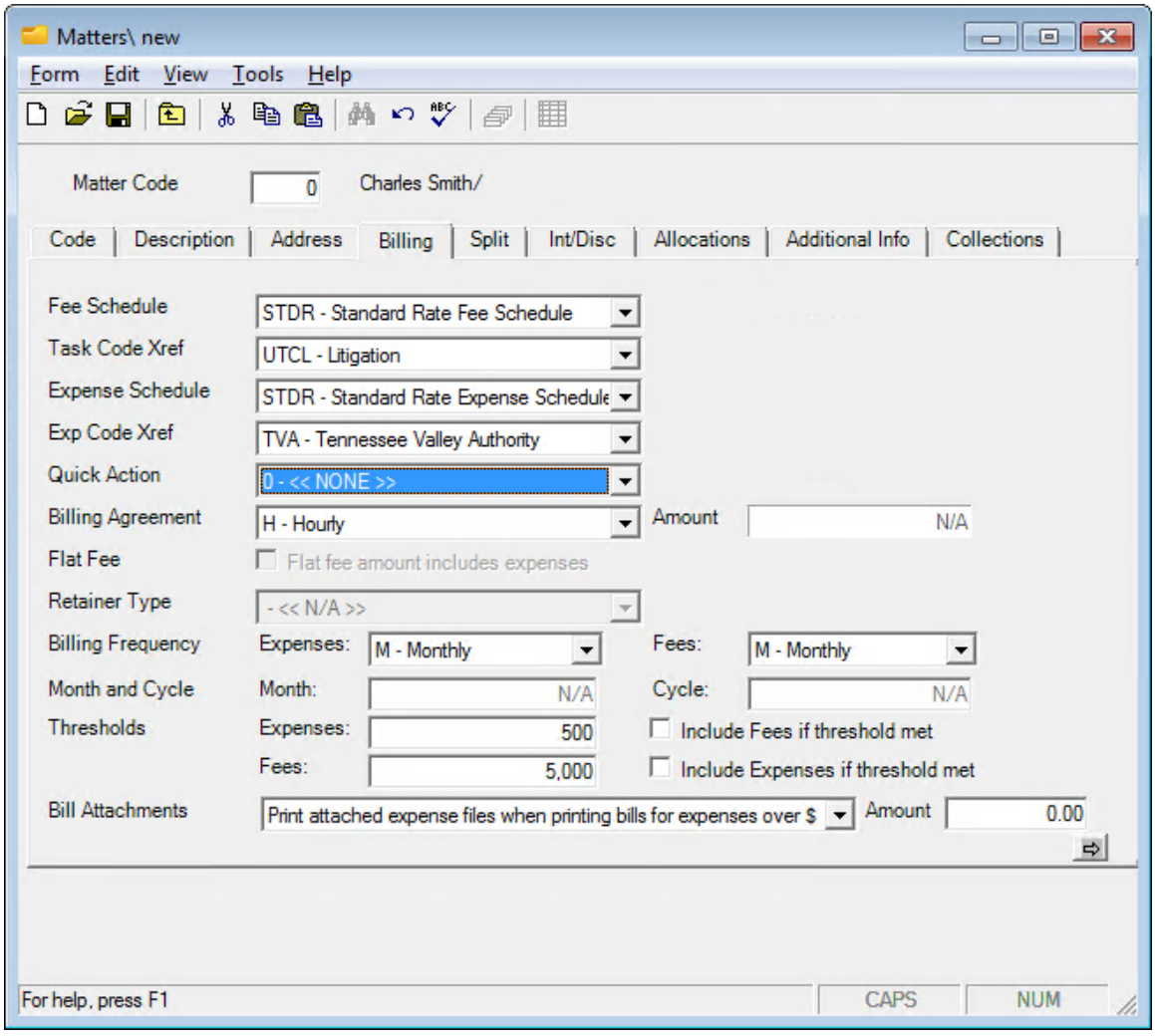

- Enter or select **Fee Schedule Code**. The fee schedule assigned to the **Matter** will determine the **Timekeeper** rates used.

  > **Warning:** If the selected **Fee Schedule** does **NOT** match the selected **Client Fee Schedule**, a mismatch warning box will appear. Click the **OK** button and make the appropriate changes so that a match occurs.

- Enter or select Task Code **Xref Code**, if applicable.
- Enter or select **Expense Schedule Code**. The expense schedule assigned to the Matter will determine the amounts charged for expenses.
- Enter or select **Expense Code Xref Code**, if applicable.

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- Select a **QuickAction** code in order to automatically assign an action code to the **prebill** upon selection. See Edit Prebills for details.
- Enter or select **Billing Agreement Code**.
- If **Flat Fee Billing Agreement**, check box if **FlatFeeAmountIncludesExpenses**. Any action to be made on the billing agreement after posting a Flat Fee Bill is determined in Firm Options.
- If Retainer **Billing Agreement**, enter or select **Retainer Type**.
- Enter or select **BillingFrequency** for **Expenses**/**Fees**. Any action to be made on the billing frequency after posting a **Flat Fee Bill** is determined in Firm Options.
- If **Billing Frequency** (**Q**)uarterly, (**S**)emiannually or (**A**)nnually, enter **Billing Month**.
- If **Billing Frequency** (**C**)ycle, enter Cycle 1-999.
- Enter **Billing Thresholds** for **Expenses/Fees**. Threshold defaults will be established in Firm Options. Threshold billing is activated when **Prebills** are printed **ByFrequency**. When posted fee or expenses reach or exceed thresholds, the prebill will be generated even if it falls outside established **BillingFrequencies** for that item. If the prebill prints only because the **FeeThreshold** was met, then only fees will print. If it prints because the **ExpenseThreshold** was met, then only expenses will print.
- Using the **Bill Attachments** drop-down list, specify if existing attachments will be included when printing bills. The following options are available:
  - **Print attached expense files when printing bills**. All expense attachments are included when printing bills, if present.
  - **Do not print attached expense files when printing bills**. No expense attachments are ever printed with bills.
  - **Print attached expense files when printing bills for expenses over $**. Allows you to specify a dollar amount (in the text box to the right of the option). When a bill is over this amount, any expense attachments are included when printing bills.

> **TIP:** You can specify this setting's default option, which is always used for new clients and related matters, at the firm level of Juris. For more information, see Configure the Billing tab.

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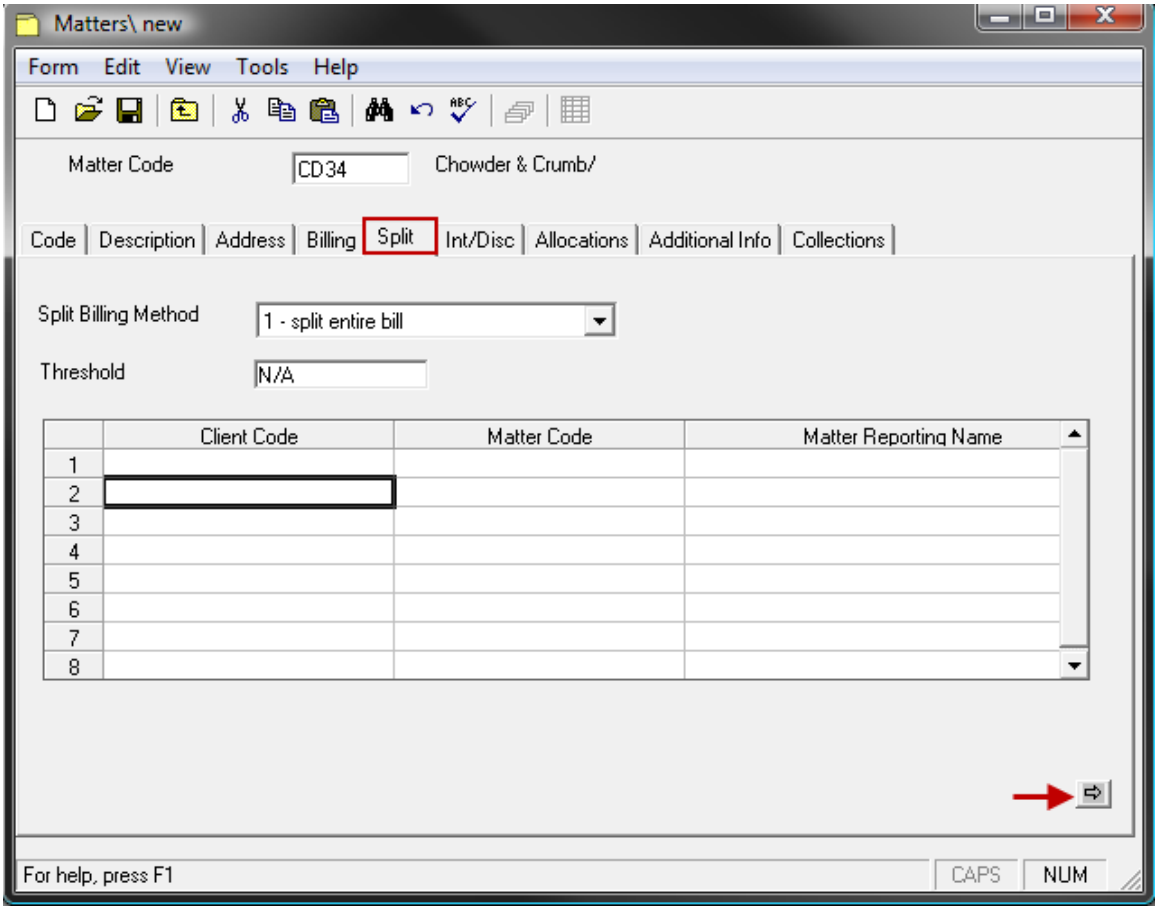
11. Fill out the items on the **Split** tab.



- In the spreadsheet, enter the **Matters** that the bill should be split to - and for each 'split to' matter, enter the percentage of the bill that should be split to that matter.

  The '**split to**' Matters must be created before they can be assigned in the spreadsheet. The 'split to' matters can be outside the current client, or can include matters within the current client, including the current matter being split.

12. Optionally, fill out the items on the **INT/DISC** tab.

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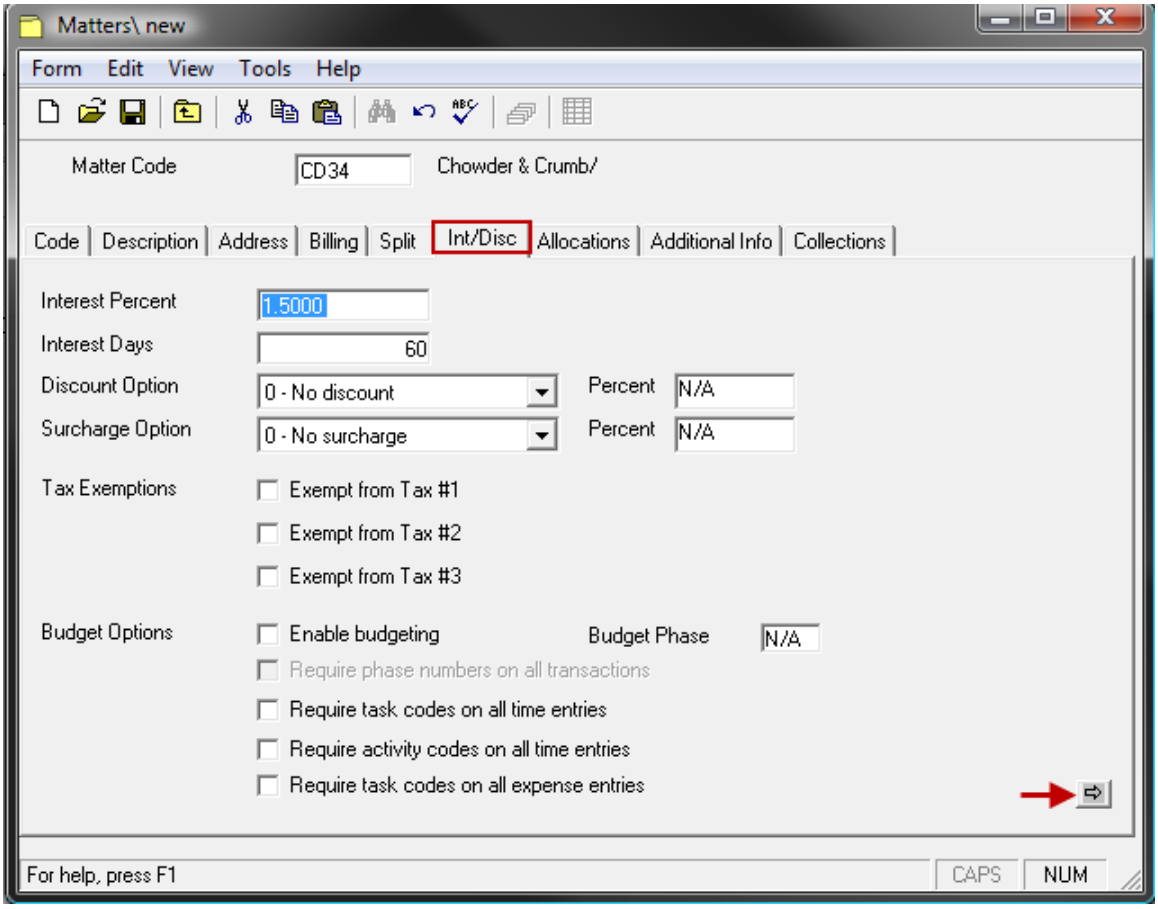

- **Enter Interest Percent** (0.0000-100.0000%), if applicable.
- Enter **Interest Days** 1-365, which is the number of days in the grace period before interest will begin to accrue on past due balances.
- Enter or select **Discount Option** and **Percent** (0.0000-100.0000%), if applicable.
- Enter or select **Surcharge Option** and **Percent** (0.0000-100.0000%), if applicable.

> **NOTE:** Defaults and ability to change **Interest**, **Surcharge** and **Discount** is determined by settings in Firm Options.

- Check **Tax Exemption** options, if applicable.
- Check box to **Enable Budgeting**, if applicable.
- If **Enable Budgeting** is selected, check box to **Require Phase Numbers** on all **Transactions**, if applicable.

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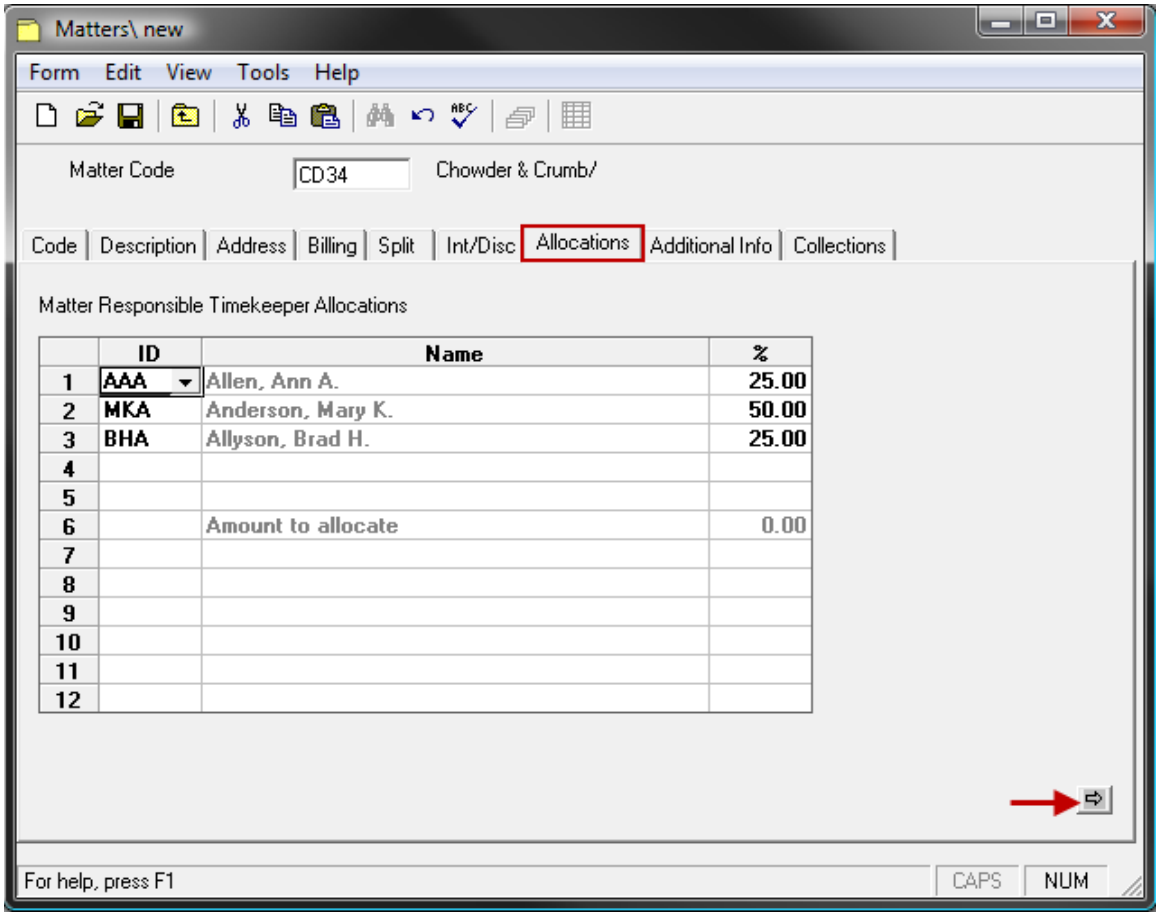
- Check box to **Require Task Codes** on all **Time Entries**, if applicable.
- Check box to **Require Activity Codes** on all **TimeEntries**, if applicable.
- Check box to **Require Task Codes** on all **ExpenseEntries**, if applicable.

13. Optionally, complete the **Allocations** tab.



- Select an **ID**.
- Enter a **percentage**. Each new line will automatically populate the percentage field with a value that adds up to 100 percent.

14. Optionally, complete the **Additional Info (Billing Format)** tab.

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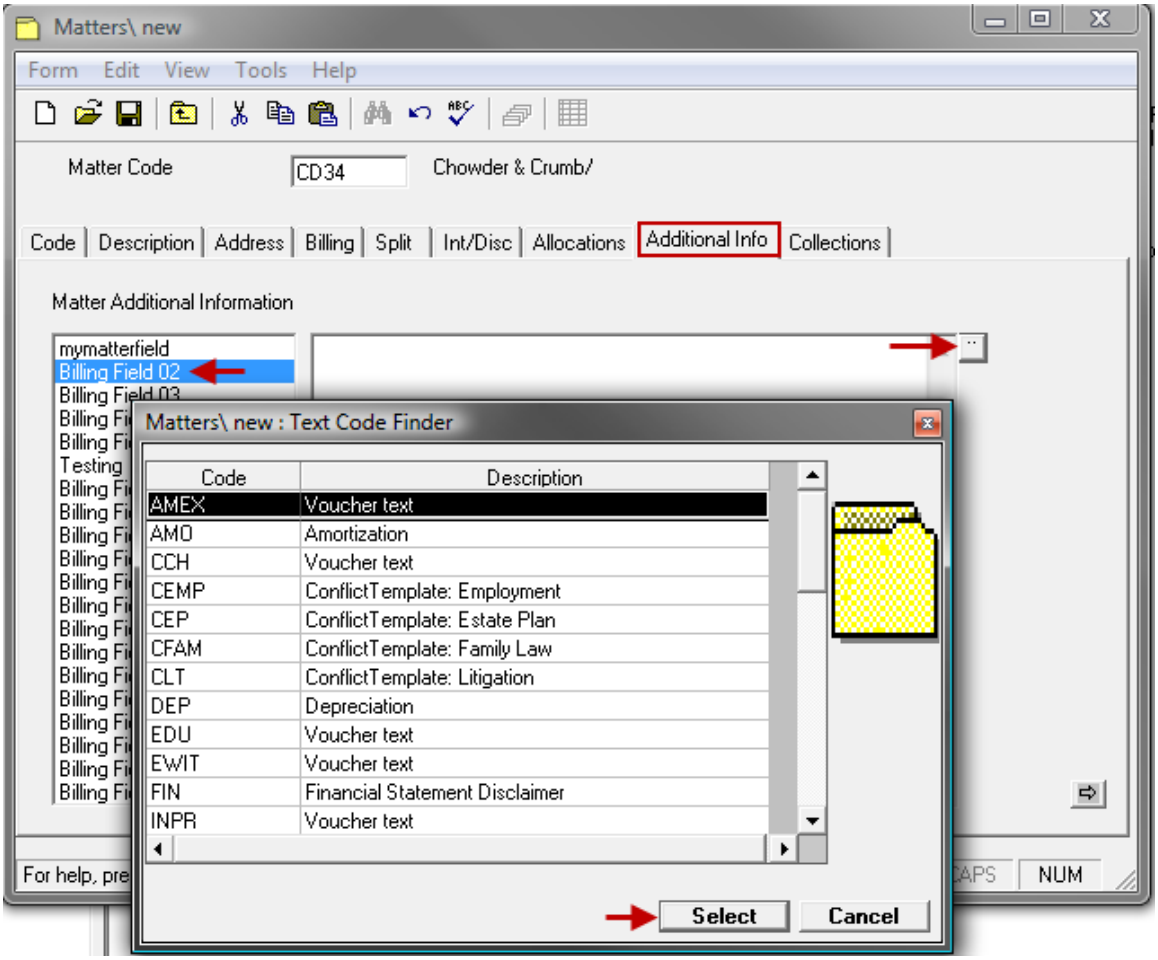

- Select a filed in the left column.
- Click the **ellipses** button to bring up the **Text Codes** for selection.
- Progress through each of the applicable fields, each time using the **ellipses** button to select a **Text Code**.

15. Optionally, complete the **Collections** tab.

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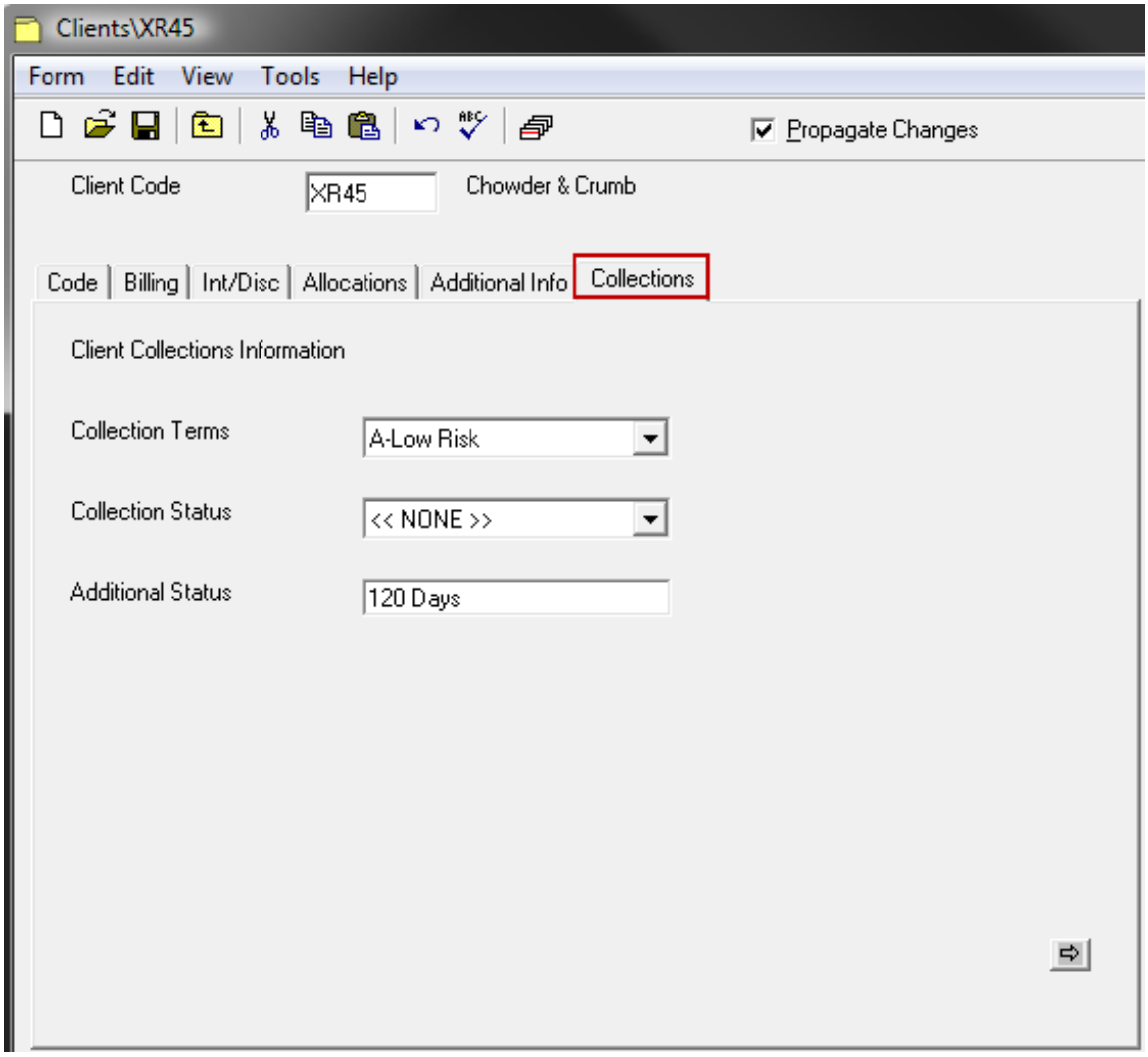

- Select **Collection Terms**.
- Select **Collection Status**.
- Enter **Additional Status** if appropriate.

16. **Spell Check** the form using any of the following options:
    - Click the **Spell Check** icon.
    - Select **Form** > **Spelling** from the toolbar.
    - Use the keystroke shortcut **F7.**
17. **Save** the changes by using any of the following options:

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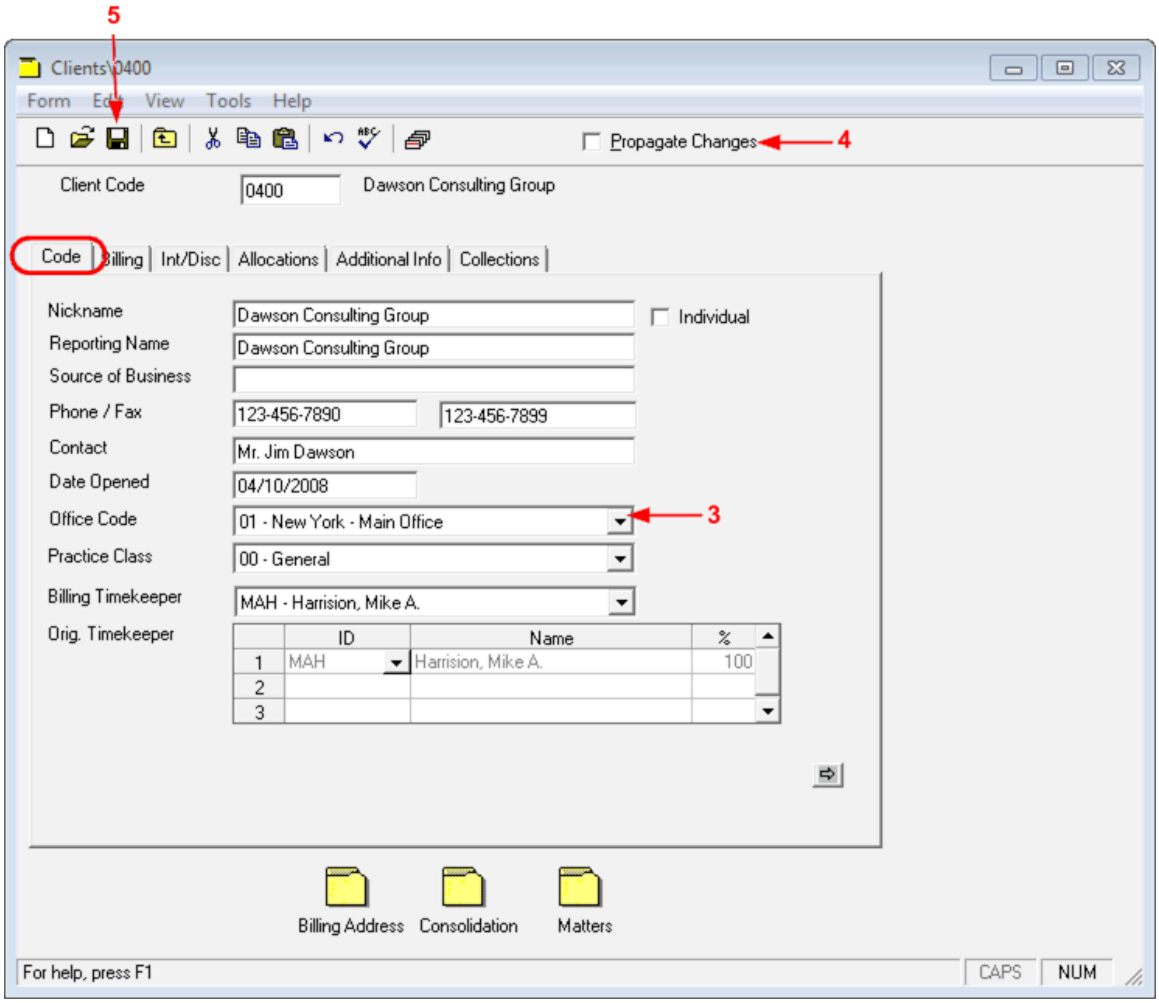
- Click the **Save** icon.
- Select **Form** > **Save** from the toolbar.
- Use the keystroke shortcut **Ctrl + S.**

Change the Office Code of a client and matter

To change the Office Code of a client and matter:

1. Launch the **Juris** application, and then select **Tables**, then **Clients**.
2. Select the Client to be assigned to an office.



3. Under the **Code** tab, click the Lookup icon beside the **Office Code** field and select the office code for the office to be associated with the client.

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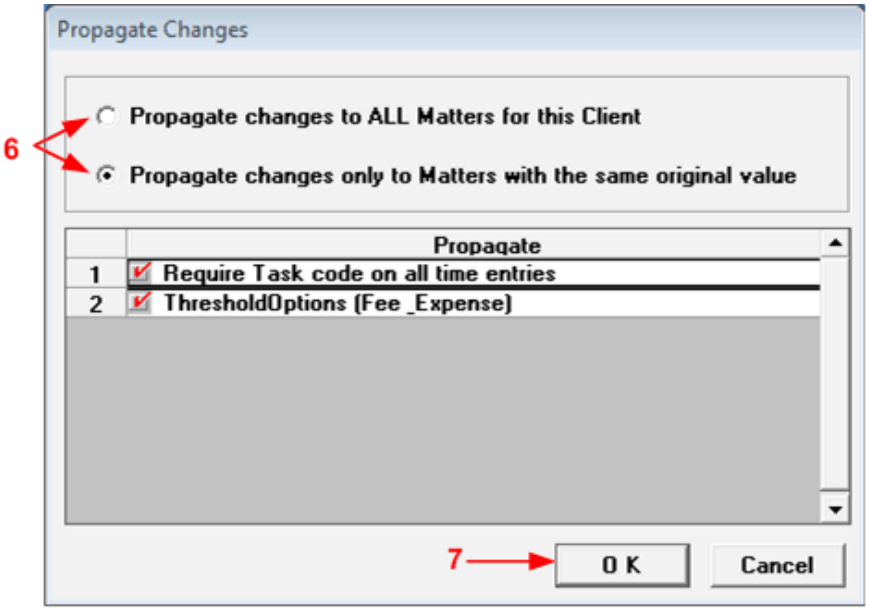
4. Select **Propagate Changes** at the top of the window if you want the change to affect the matters.
5. **Save** your changes.
6. On the resulting popup display, select either **Propagate changes to ALL Matters for this Client**, or **Propagate changes only to Matters with the same original value**.



7. Click **Ok** to continue.
8. If you prefer to associate matters with offices individually, rather than in a group, click the **Matters** icon at the bottom of the Clients window.
9. Select a matter to be associated with the new office.
10. In the **Matters** window, click the Lookup button beside the Office Code field, and select the office to be associated with the matter.
11. **Save** your changes.

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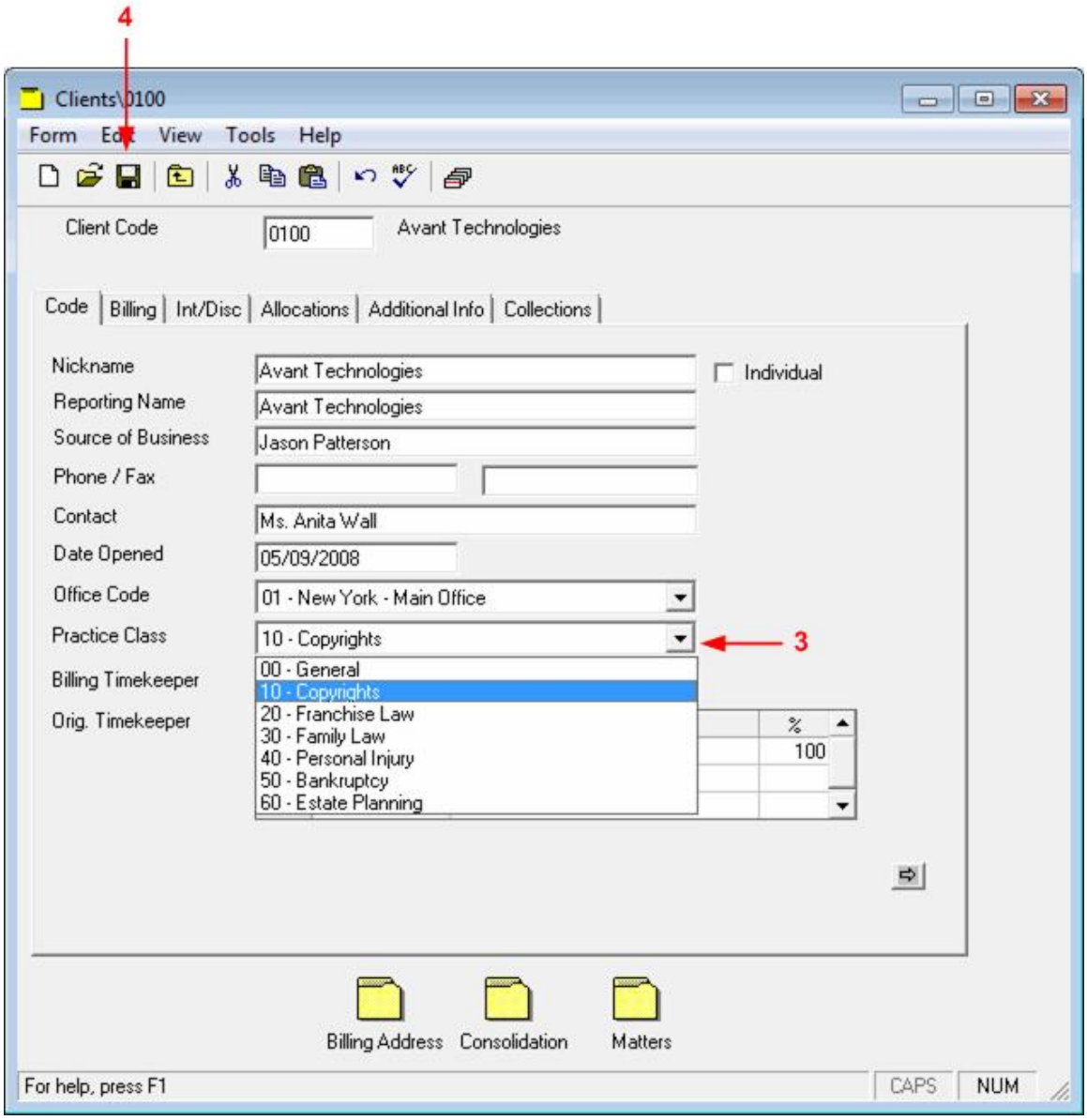
Assign a Practice Class to a client

To assign a Practice Class to a client:

1. Launch the **Juris** application, and then select **Tables**, then **Clients**.
2. Double-click the client record to be assigned a practice class, from the list.
3. On the **Clients** window, click the drop down icon beside the **Practice Class** field and select the desired practice class.



4. **Save** your changes.

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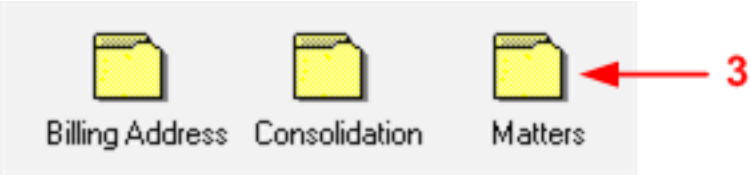
Assign a Note Card to a Matter

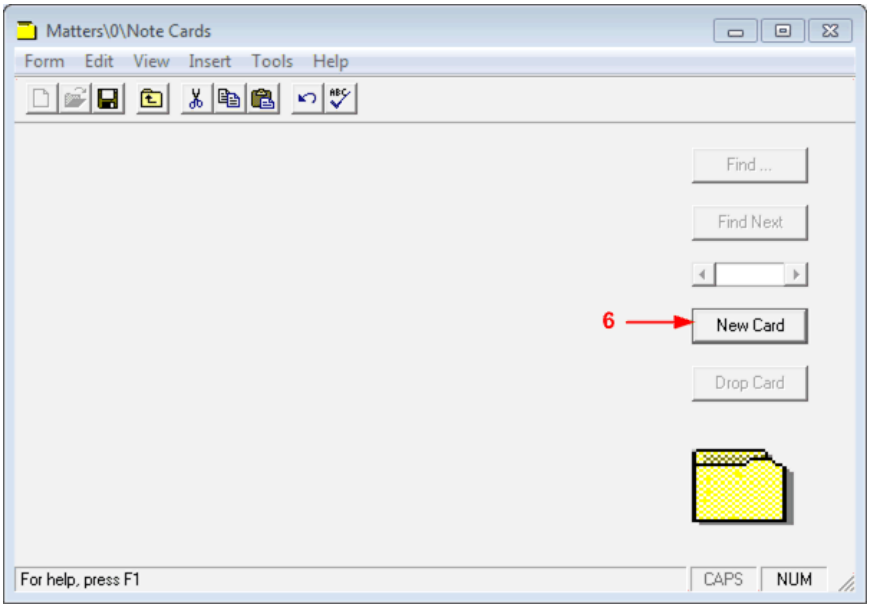
To assign a Note Card to a Matter:

1. Launch the **Juris** application, and then select **Tables**, then **Clients**.
2. Select the client associated with the matter from the list.
3. Click the **Matters** icon.



4. On the matters popup window that displays, double-click the matter for which a note must be added.
5. On the **Matters** form that displays, click the **Note Cards** icon.

6. Click the **New Card** button on the Matter popup window.



7. Enter a caption, similar to a title, for the note on the displayed pop up.

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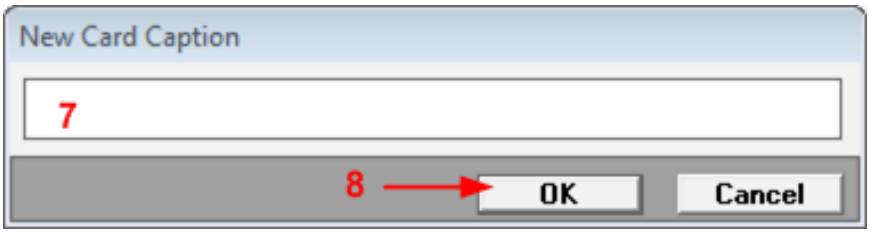
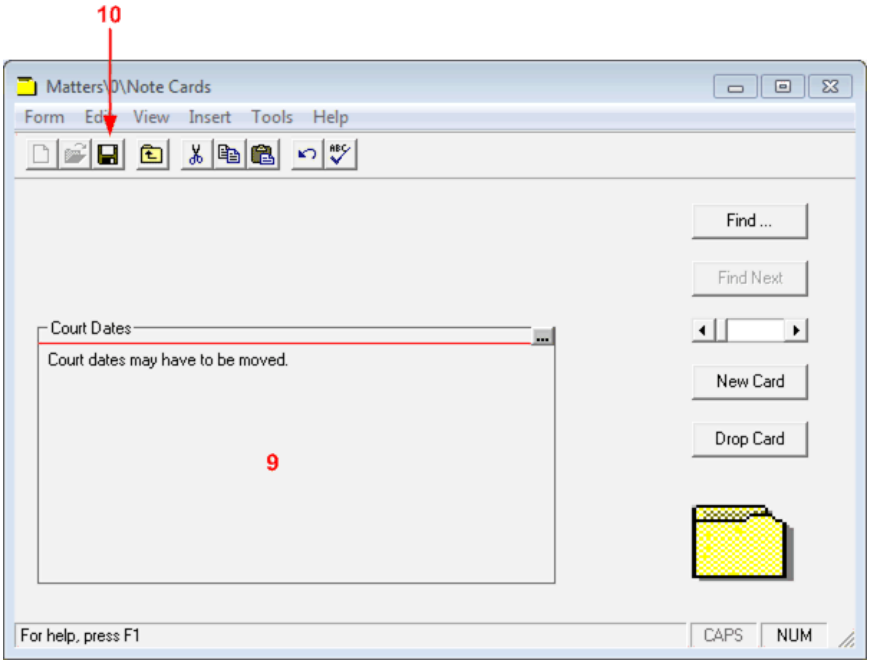


8. Click **Ok** to continue.
9. Enter the text of your note on the resulting **Note Cards** popup.



10. **Save** your changes.

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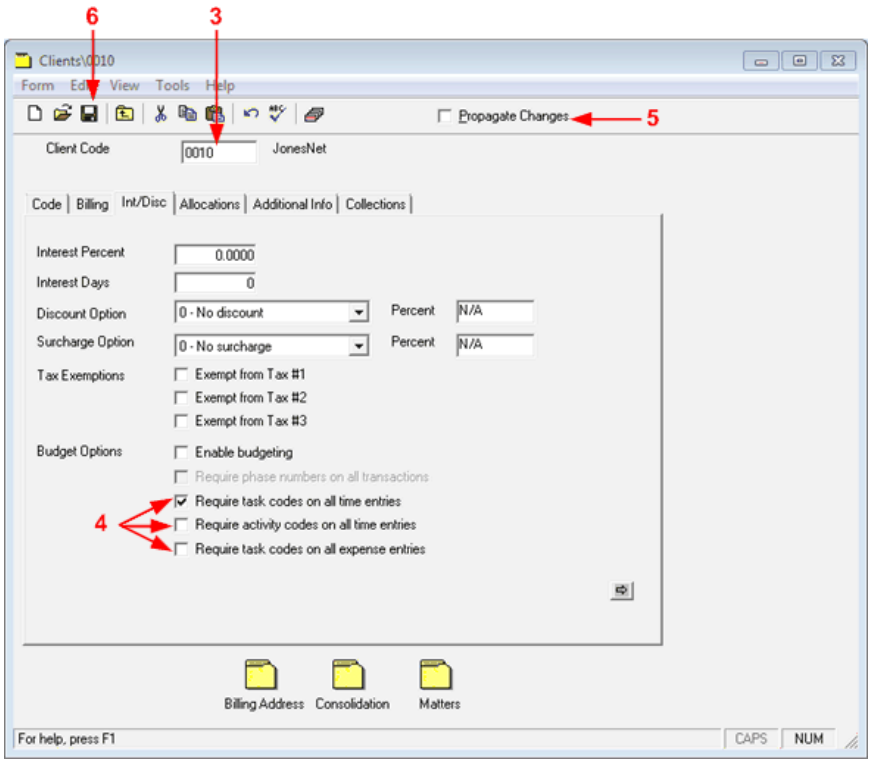
Time entry and tracking

The following codes are used for tracking time:

- Task Codes
- Cross Reference Task Codes
- Activity Codes
- Text Codes

Assign a mandatory task code to a client and matter

1. Launch the **Juris** application, and then select **Tables**, then **Clients**.
2. Double-click the client to be associated with a specific task code. The client form will display.
3. Click the **Int/Disc** tab.



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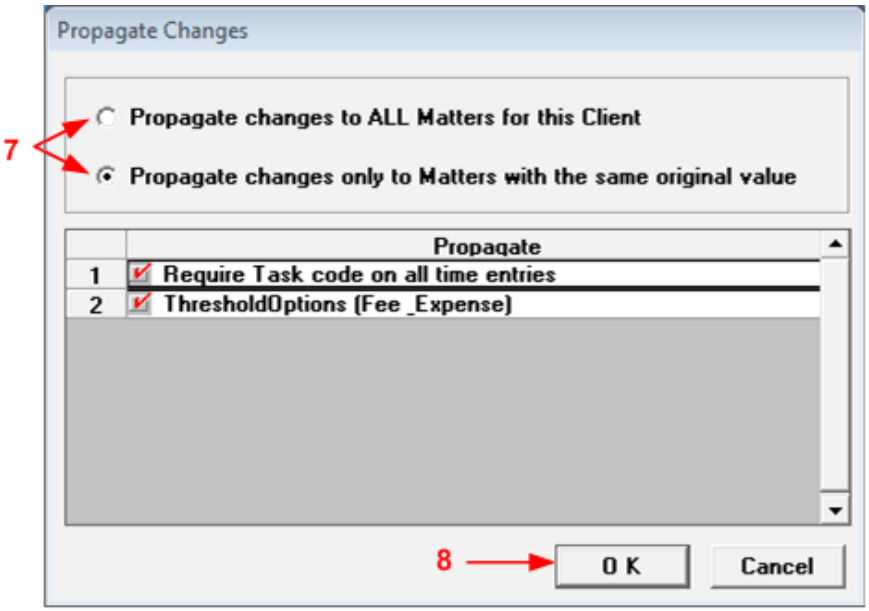
4. Click to check one of these options; **Require task codes on all time entries**, or **Require task codes on all expense entries**, or both. Note that checking either or both options does not affect matters that already exist for the client.
5. To associate the task code with matters, click to check the **Propagate Changes** field.
6. **Save** your changes
7. If you indicated that the task code use should be propagated, a popup window will display. Check one of the following; **Propagate changes to ALL Matters for this Client**, or **Propagate changes only to Matters with the same original value**. This refers to the discount value.



8. Click **Ok** to continue.
9. If you elected not to propagate the change to ALL matters for the client, then matters that do require the change must be changed individually. To do that, begin by clicking the **Matters** folder icon.

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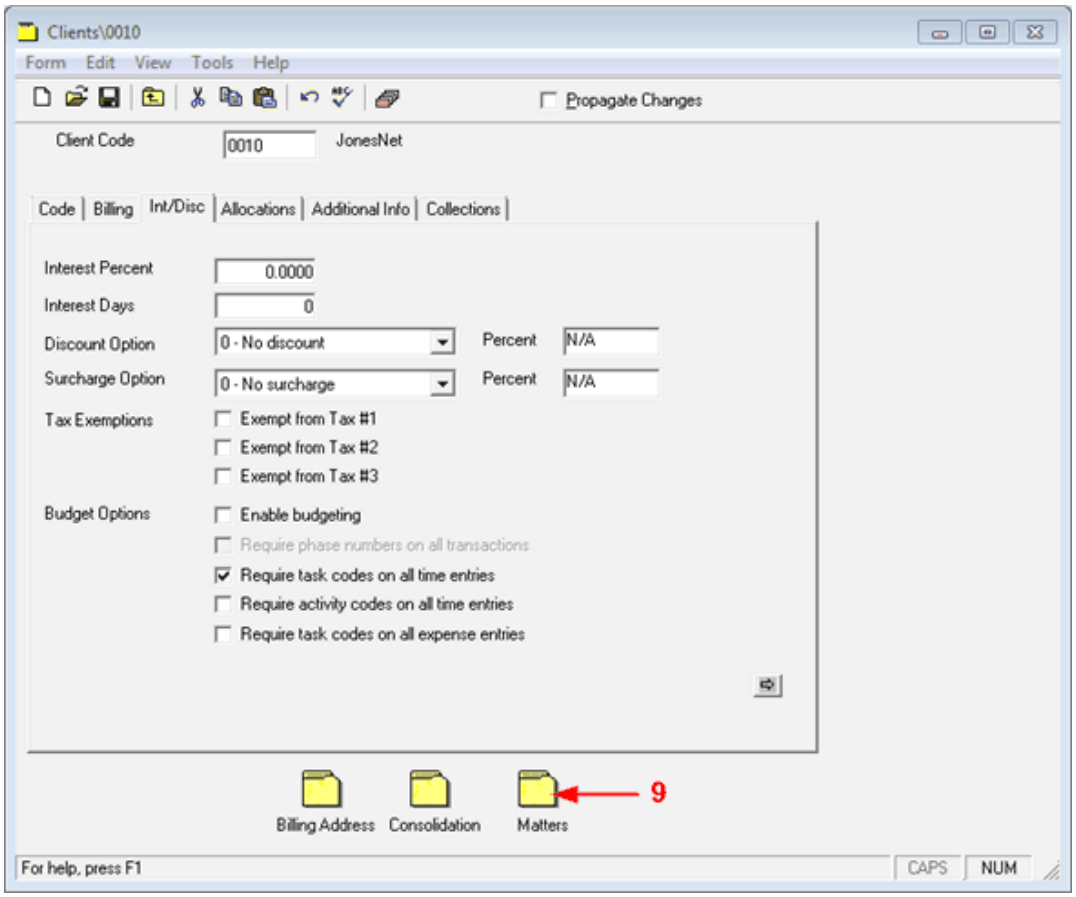
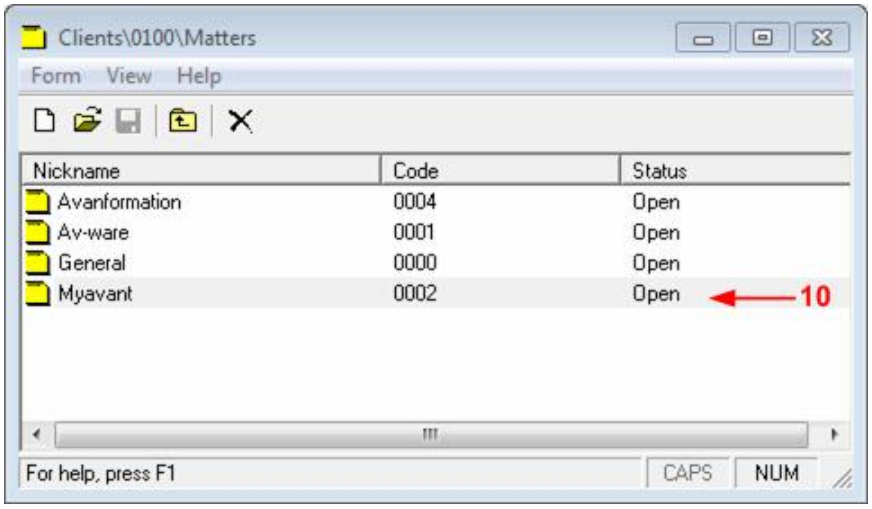


10. Double-click a matter record to be changed.



11. A form window displays for the selected matter. Display the **Int/Disc** tab.

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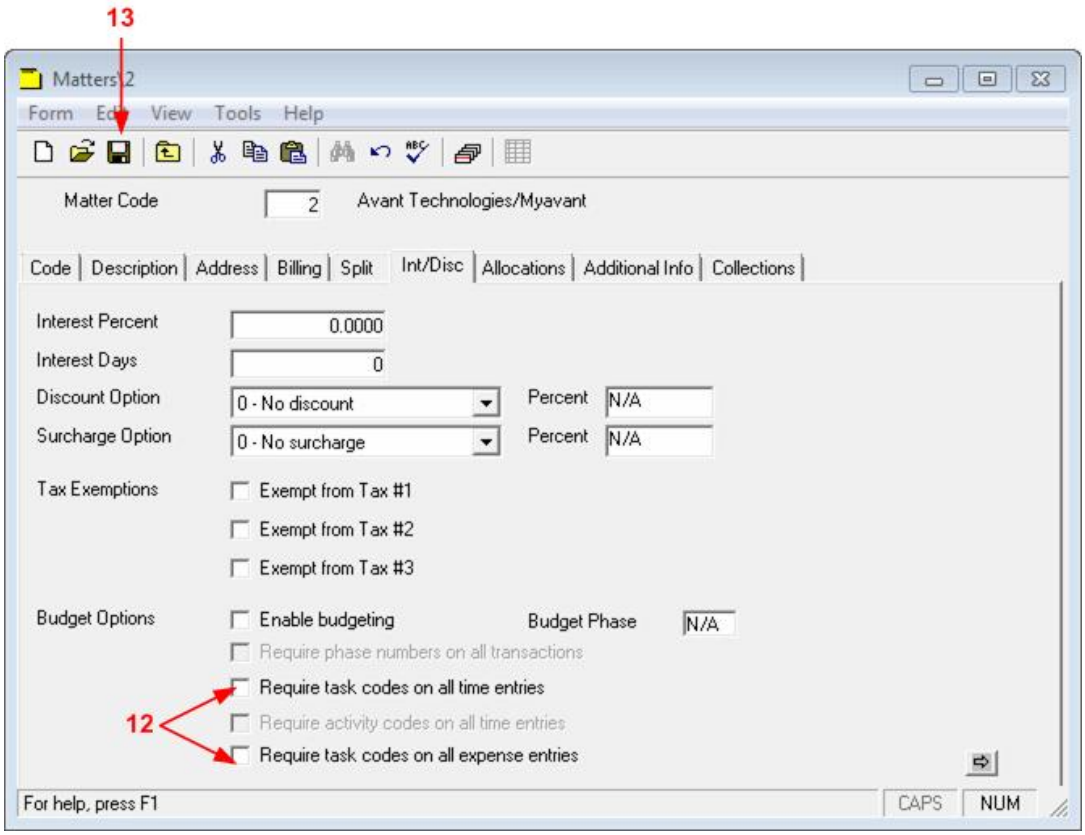
12. Click to check one or more of the Budget Options; **Require task codes on all time entries**, **Require task codes on all expense entries**, or both. Note that checking either or both options does not affect matters that already exist.



13. **Save** your changes.

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Edit a Task Code

To edit a Task Code:

1. Select **Tables** > **Task Codes**.
2. Open the existing **Task Code** using any of the following methods:
   - Double-click the icon or description for the account to be edited.
   - Use the arrow keys on the keyboard to move through the list and select the account to be edited, then press the **Enter** key.
3. Make any necessary modifications desired.

   > **NOTE:** The system does not allow the code to be changed.

4. Spell check the form using any of the following options:
   - Click the **Spell Check** icon on the toolbar.
   - Select **Form** > **Spelling** from the menu.
   - Use the keystroke shortcut **F7**.
5. Save the changes by using any of the following options:
   - Click the **Save** icon on the toolbar.
   - Select **Form** > **Save** from the menu.
   - Use the keystroke shortcut **Ctrl + S**.

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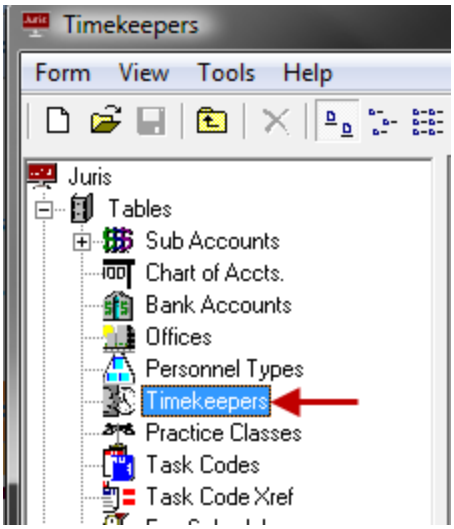
Create a Timekeeper

To create a Timekeeper:

1. Select **Tables** > **Timekeepers**.



2. Open a new **Timekeeper** form by using any of the following options:
   - Click the **New** icon.
   - Select **Form > New** from the menu.
   - Use the keystroke shortcut **Ctrl + N**.

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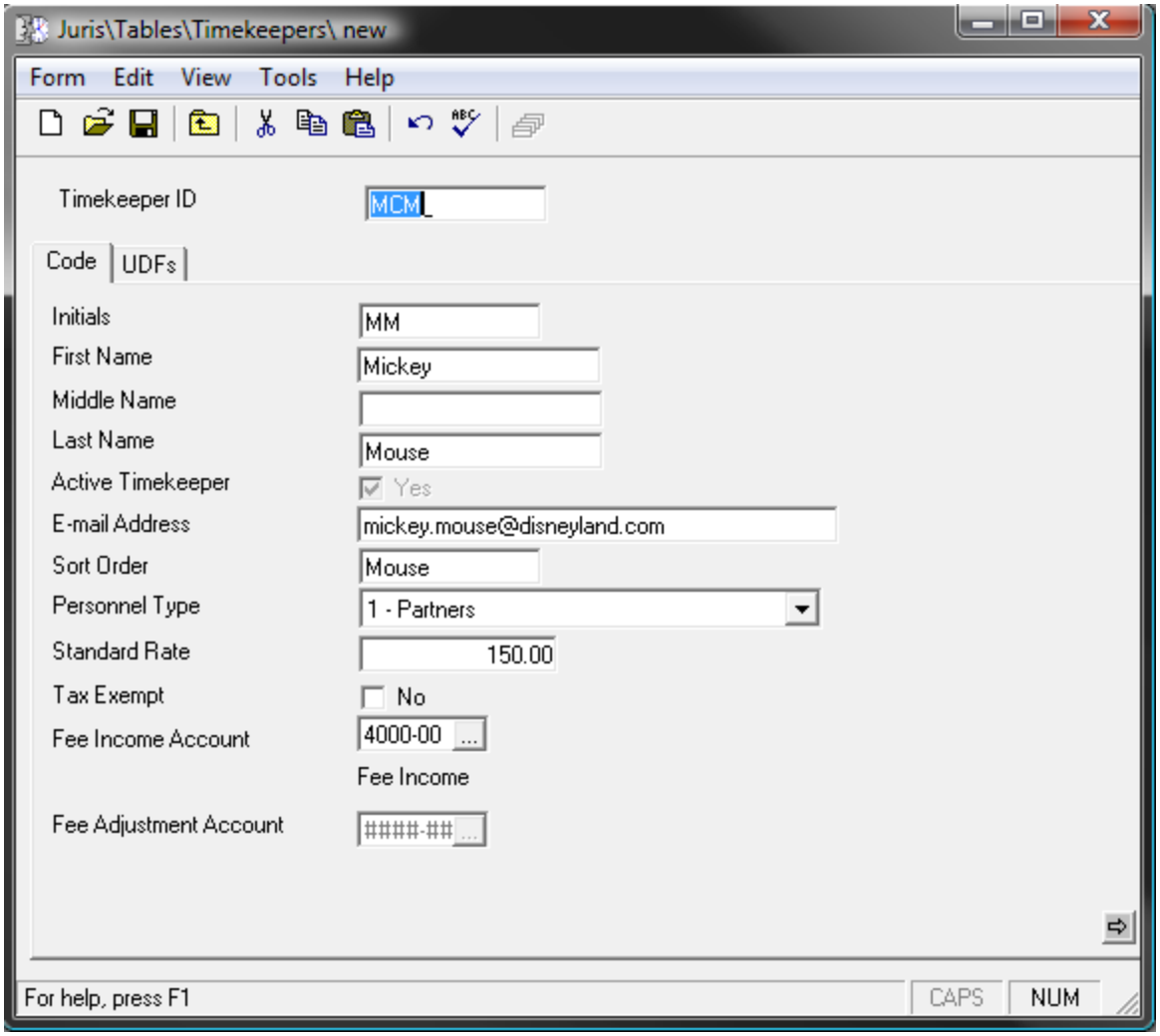

3. In the **Timekeeper ID** text box, type a 1-4 character timekeeper code.

   The code can be comprised of digits, alpha characters, or a combination of both.

   > **TIP:** If the Timekeeper ID matches the User ID of an existing user, then the information in the rest of the form (except for the Personnel Type and Rate) are pre-populated, based on the corresponding information in the User ID form.

4. Select or type the remaining information on the form.

   > **NOTE:** If you are on version 2.35 or higher, you can leave the First Name and Middle Initial blank.

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5. Spell check the form using any of the following options:
   - Click the **Spell Check** icon on the toolbar.
   - Select **Form** > **Spelling** from the menu.
   - Use the keystroke shortcut **F7**.
6. Save the **Timekeeper** using any of the following options:
   - Click the **Save** icon on the toolbar.
   - Select **Form** > **Save** from the menu.
   - Use the keystroke shortcut **Ctrl + S**.

   Once saved, the Budgets and Fee Schedules icons appear.

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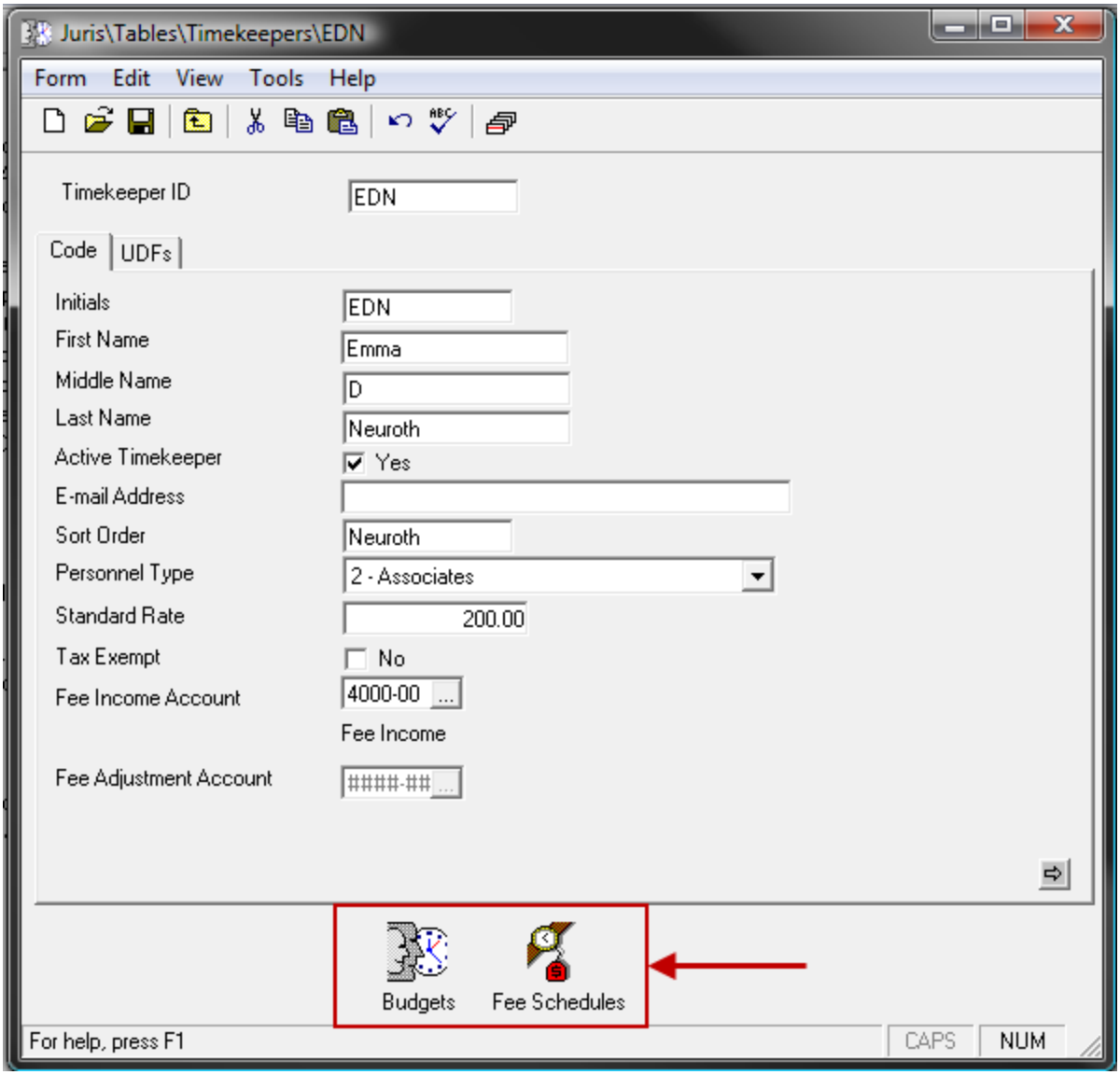

7. Click the **Budgets** icon to review the item.

   Go to the Timekeeper Budgets topic for more details.

8. Click the **Fee Schedules** icon to review the item.

   Go to the Fee Schedules topic for more details.

> **NOTE:** The Timekeeper is automatically added to the Standard Fee Schedule at the rate entered on the Timekeeper form. Adding the timekeeper to other fee schedules is optional.

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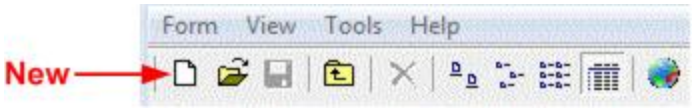
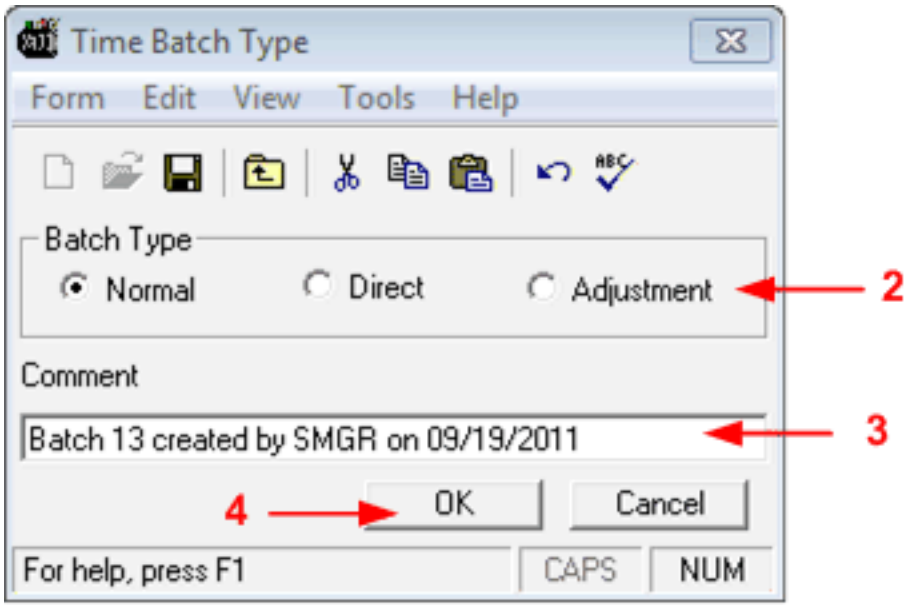
Create a Time Entry batch

To create a new Time Entry batch:

1. Launch the **Juris** application, and then select **Transactions**, then **Time Entries**. On the Time Entries list window, click the **New** icon.



2. Select the batch type; **Normal**, **Direct**, or **Adjustment**.



3. A comment has been provided by Juris. The comment contains important information including the sequence number of the batch and the date the batch was created. Edit the comment if necessary; however, remember that the information provided by the system might be important later.
4. Click **Ok** to continue.

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Edit a Posted and Unbilled Time Entry

You can edit an entry if it is unbilled and not on an open prebill.

1. Double-click **Transactions** and then double-click **Time Entry**
2. Click **Form** and then click **New**.
3. Click the **Adjustment** button, which is located under Batch Type.
   Note the following:
   - A normal batch creates new time entries that do not post.
   - A direct batch creates new time entries that post automatically when you save it.
   - An adjustment batch edits time entry posts.
4. Optionally, in the **Batch Comment** box, type a comment.
5. Click **OK**.
   The Batch window opens.
6. Click **Form** and then select **New**.
   The Time Adjustment Search window opens.
7. Select one or more search criteria: **Date**, **Timekeeper**, **Client**, or **Matter**.
8. Click **Find Now**.
9. Double-click the entry you want to open.
10. Edit the fields that you want to change in the Time Adjustment Search window.
11. In the **Post in period of** area, click **Today's Date** or **Original Date**.
12. Click **Form** and then click **Save**.

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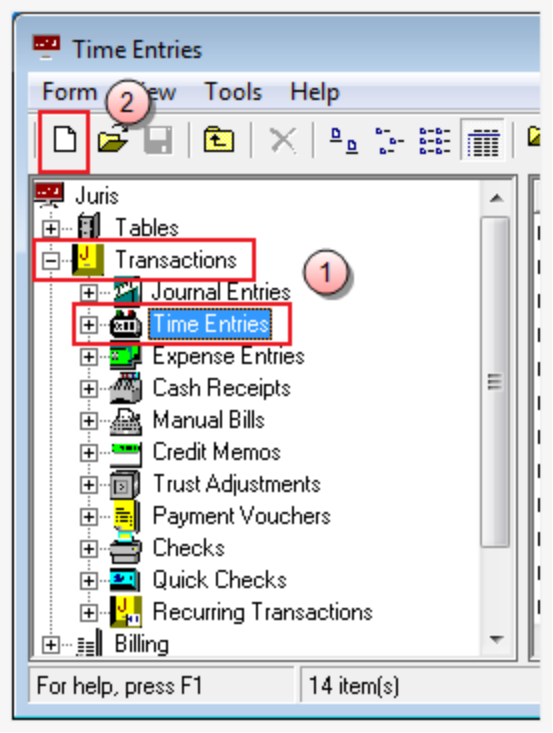
Record a Time Entry

To record a new Time Entry:

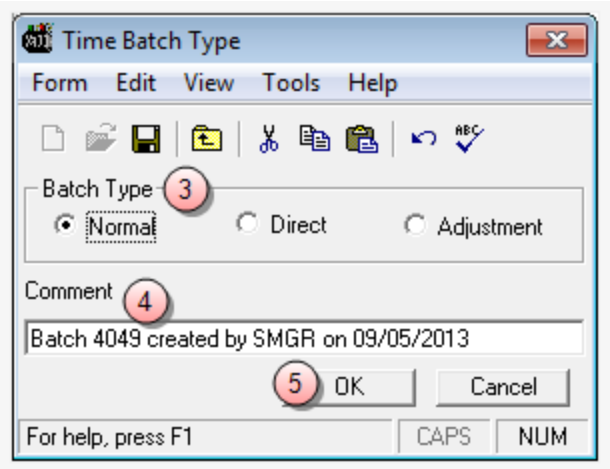
1. Select **Transactions** > **Time Entries**.



2. Click the **New** icon on the toolbar.

   Alternatively, you can select **Form** > **New** > **Time Entry** from the menu.

   The Time Batch Type window opens.



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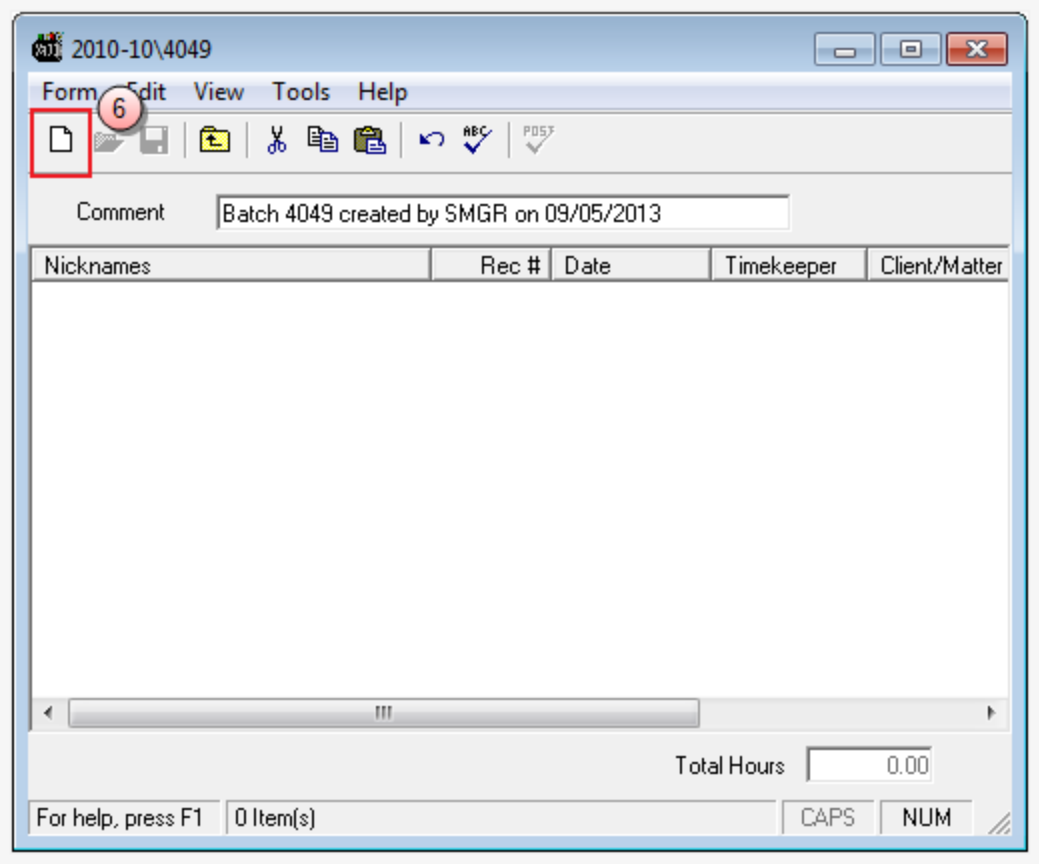
3. Select **Normal**, **Direct**, or **Adjustment** in the Batch Type section to indicate the type of batch file you want to create.
4. In the **Comment** text box, accept the default, or double click in the text box and type a new comment.
5. Click **OK**.

   The batch window opens.



6. Click the **New** icon on the toolbar to open a new Time Entry window.

   Alternatively, you can select **Form** > **New** from the menu, or press **CTRL + N** on your keyboard.

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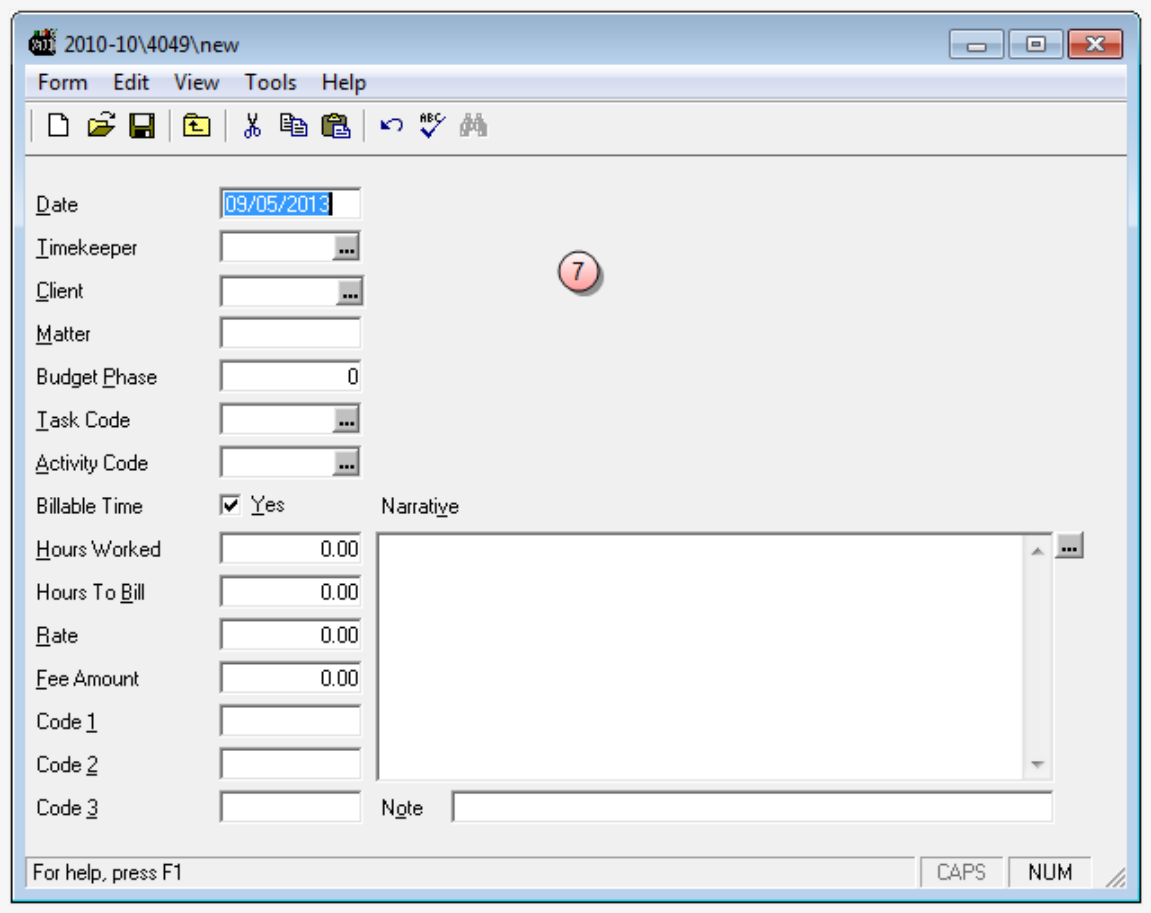

7. In the **Time Entry** window, type and select the time entry details.

> **TIP:** Press the **F9** key in any text box to duplicate the value for that text box based on the value used in the previous time entry. Text boxes may be set to always duplicate automatically by selecting auto-duplicate options, found under **Tools** > **Preferences** on the menu in the Time Entry window.

8. Click the **Save** icon on your toolbar to save the time batch.

   Alternatively, you can select **Form** > **Save** from the menu, or press **CTRL + S** on your keyboard.

> **NOTE:** Normal batches must be Posted before they are complete. See Post a Transaction Batch for details.

Post a time entry

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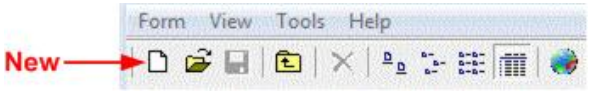
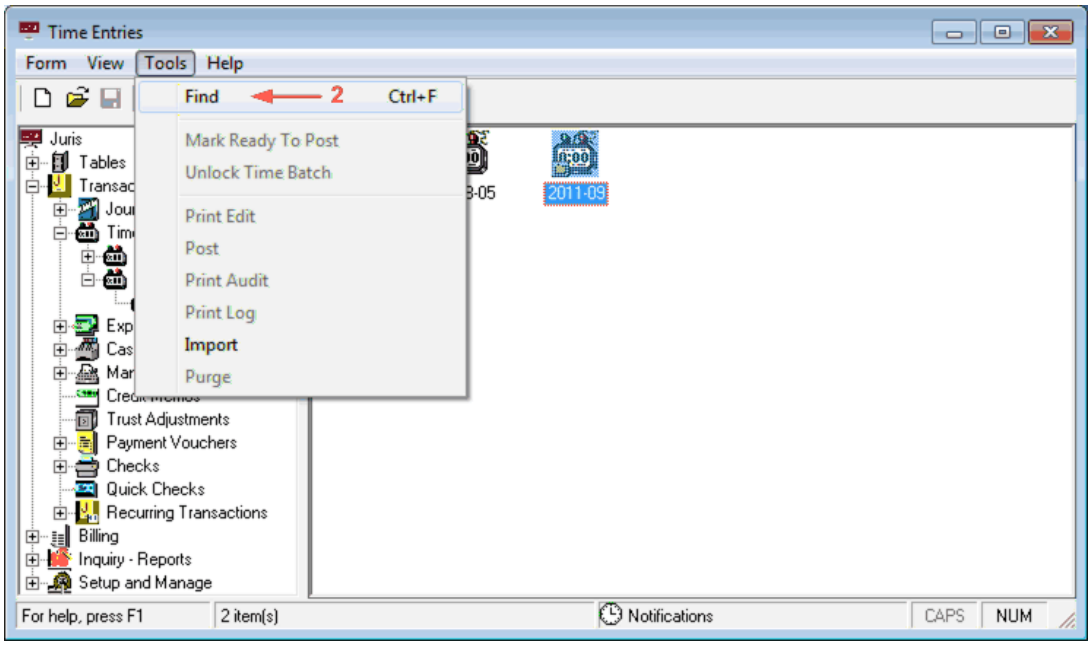
To post a Time Entry:

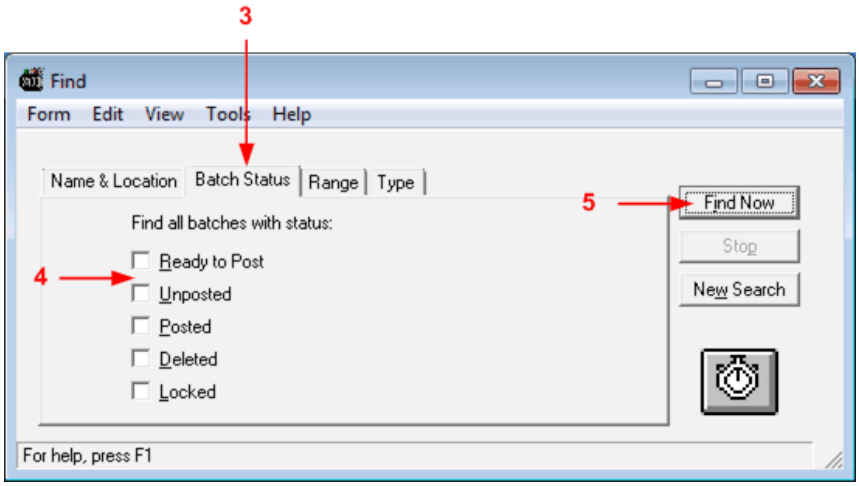
1. Launch the **Juris** application and then select **Transactions**, then **Time Entries**. On the **Time Entries** list window, click the **New** icon.



2. Expand the **Tools** menu, and then select **Find**.



3. Go to the **Batch Status** tab.



4. Select **Ready to Post** and **Unposted**.

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5. Click **Find Now**.
6. When ready to post, click the **Tools** menu, and then select **Post**.

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Set a timekeeper as active or inactive

> **NOTE:** Timekeepers cannot be deleted, instead you make their Timekeeper account inactive.

To set a Timekeeper as active or inactive:

1. Select **Tables** > **Timekeepers**.
2. Open the existing **Timekeeper** using any of the following methods:
   - Double-click the icon or description for the **Timekeeper** to be set to inactive or active.
   - Use the arrow keys on the keyboard to move through the list, highlight the **Timekeeper** and press **Enter**.

   The Timekeepers\[timekeeper ID] window opens.

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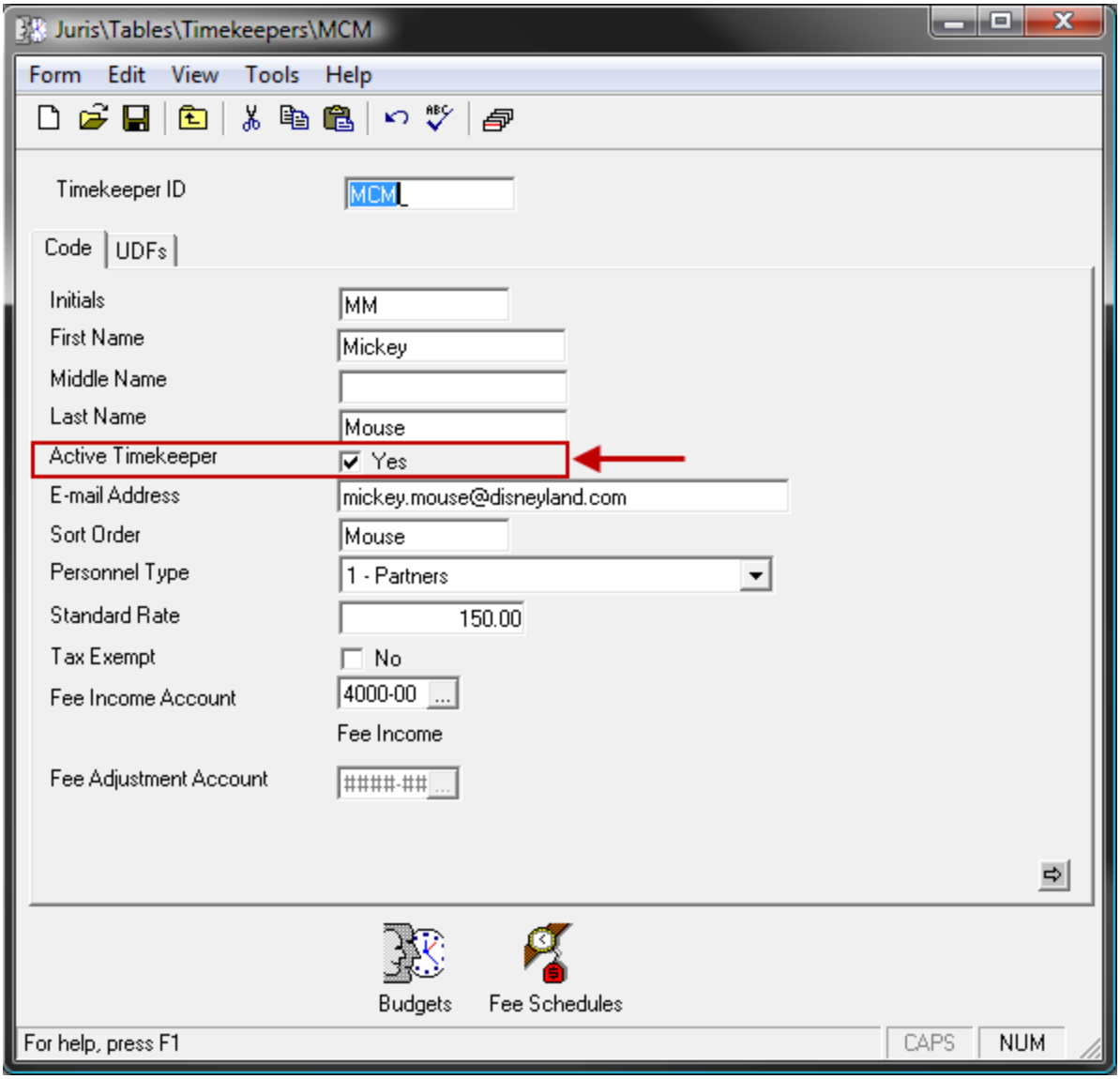

3. Remove the check from the **Active Timekeeper** check box to set the Timekeeper to *inactive* status.

   Check the Active Timekeeper check box to set the Timekeeper to *active* status.

   > **NOTE:** All new Timekeepers added are set to "Active" by default.

4. **Save** the changes by using any of the following options:

   - Click the **Save** icon on the toolbar.

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- Select **Form** > **Save** from the menu.
- Use the keystroke shortcut **Ctrl + S**.

Timekeeper tab

> **NOTE:** Remember to click the **Save** icon to commit the changes.

Maximum number of originating Timekeepers

The number of originating **Timekeepers** may be controlled here. **Maximum** number allowed may be **1-5**. If greater than 1, then each originating **Timekeeper** assigned to a **Client** or **Matter** must also be assigned a percentage of credit for the origination, and the sum of those **percentages** must **equal 100**.

Allow originating Timekeepers to be changed?

If checked, then originating **Timekeepers** may be changed after they have been entered. If unchecked, then originating **Timekeepers** are locked down once entered. This can be used as a control measure to prevent originating **Timekeepers** and percentages from being changed, which can be especially helpful if compensation is calculated based on this information.

Enter originating Timekeepers on which form?

May be set to **Client** form, **Matter** form **or Both**. If set to **Client** form, then the originating **Timekeepers** set for the **Client** will cascade to all **Matters** for that **Client**, and cannot be changed for the individual **Matters**. If set to **Matter**, then the originating **Timekeepers** must be set on the individual **Matter**. If set to **Both**, the originating **Timekeeper** set on the **Client** level will cascade to a **Matter** when a matter is created, but the originating **Timekeeper** may be changed on the **Matter**, if desired.

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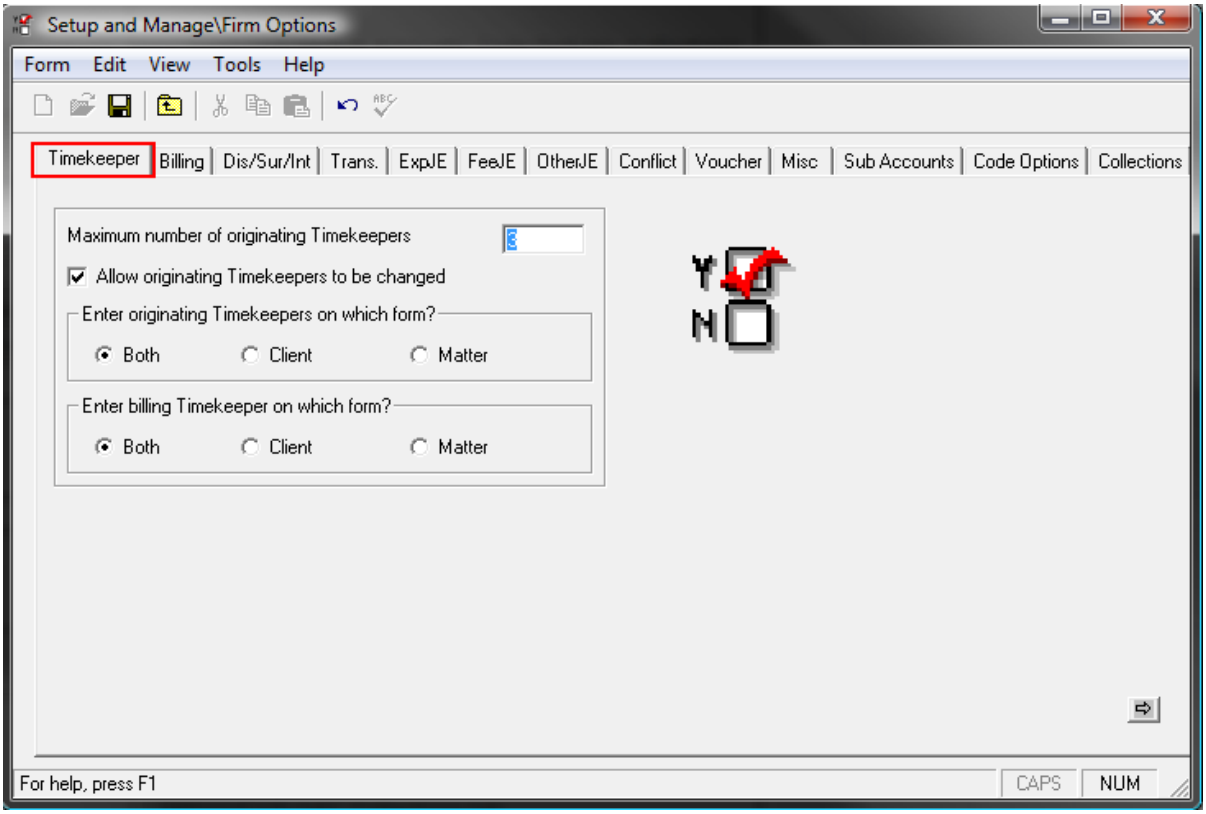
Enter billing Timekeeper on which form?



May be set to **Client** form, **Matter** form or **Both**. If set to **Client** form, then the billing **Timekeeper** set for the **Client** will cascade to all **Matters** for that **Client**, and cannot be changed for the individual **Matters**. If set to **Matter**, then the billing **Timekeeper** must be set on the individual **Matter**. If set to **Both**, the billing **Timekeeper** set on the **Client** level will cascade to a Matter when a matter is created, but the billing **Timekeeper** may be changed on the **Matter**, if desired. Each **Client** and **Matter** may have only one billing **Timekeeper**.

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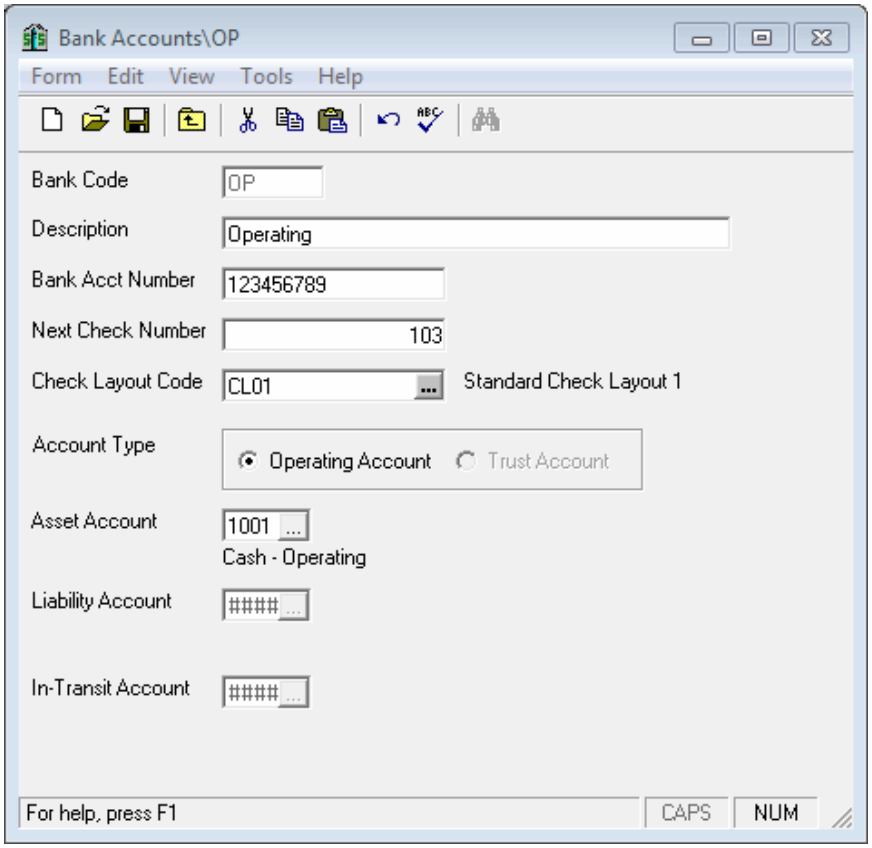
Bank Accounts

Review a Bank Account

To review a Bank Account:

1. Launch the **Juris** application, and then select **Tables**, then **Bank Accounts**. The **Bank Accounts** list displays.
2. Double-click the account to be reviewed.
3. Review the data on the **Bank Accounts** form for the selected bank account.



The account number, next check number, check layout assignment, and account type are displayed.

4. When finished, exit the form.

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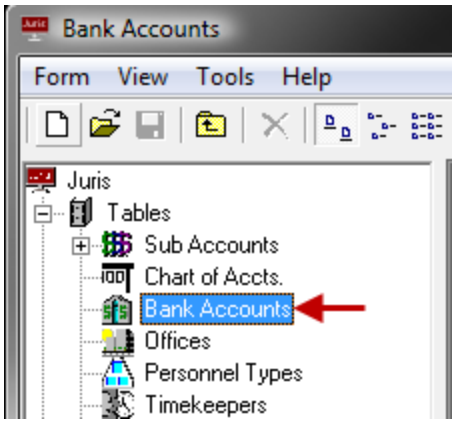
Review a checkbook

The View Checkbook may be used as a quick view of all transactions entered for a bank account.

To view a checkbook:

1. Select **Tables** > **Bank Accounts**.



2. Open the Bank Account to be reconciled by using any of the following methods:
   - Double-click the icon or description for the account that must be edited.
   - Use the arrow keys on the keyboard to move through the list and select the account, then hit the Enter key.
3. From the open Bank Account window, select Tools > View Checkbook menu to open the Bank Accounts form.
4. The view may be set to show 1, 3, 6 or 9 months of activity for the account. The Export Spreadsheet button allows the detail to be exported in a format that may be opened in a

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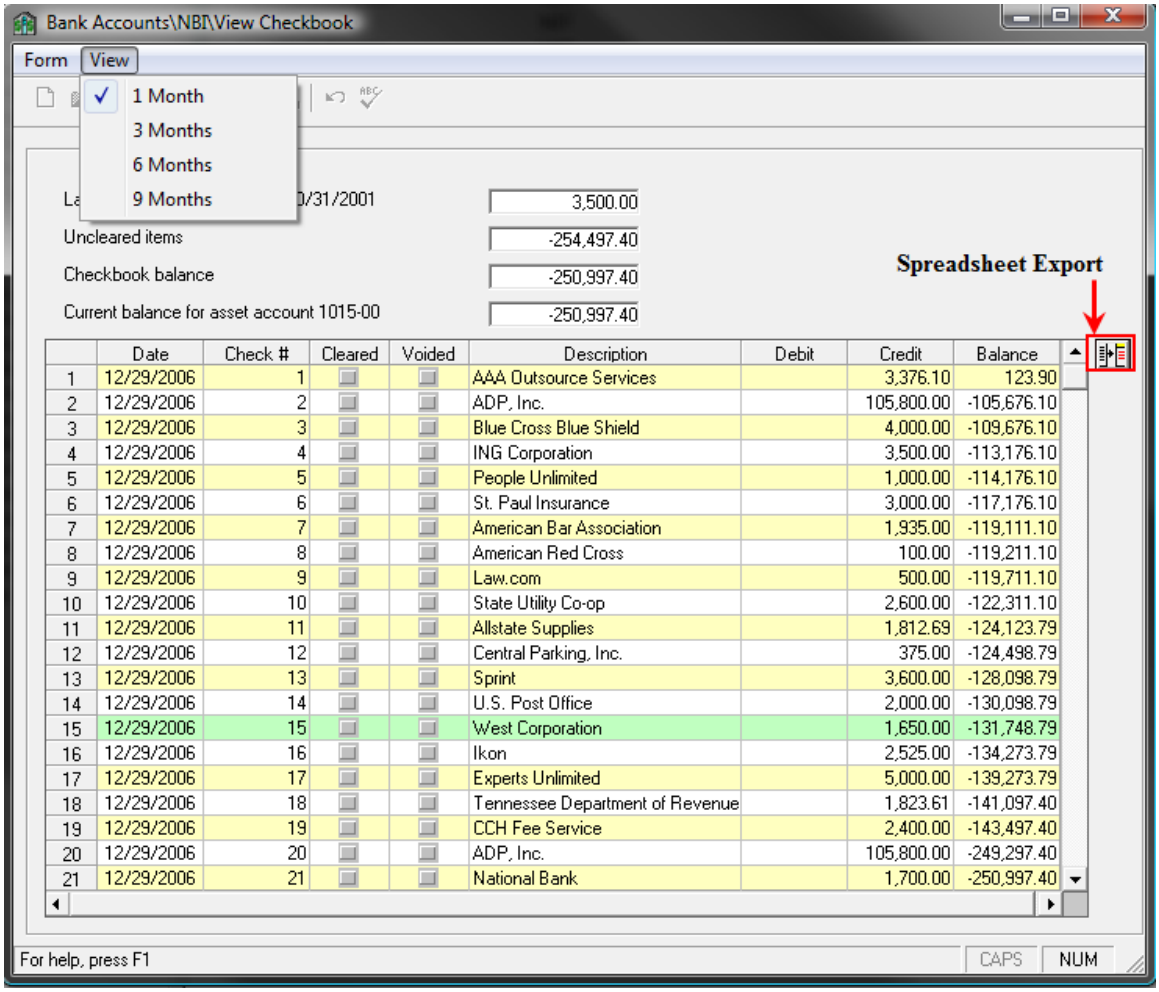
spreadsheet to allow for custom reports to be created from checkbook data on-the-fly.



	Date	Check #	Cleared	Voided	Description	Debit	Credit	Balance
1	12/29/2006	1			AAA Outsource Services		3,376.10	123.90
2	12/29/2006	2			ADP, Inc.		105,800.00	-105,676.10
3	12/29/2006	3			Blue Cross Blue Shield		4,000.00	-109,676.10
4	12/29/2006	4			ING Corporation		3,500.00	-113,176.10
5	12/29/2006	5			People Unlimited		1,000.00	-114,176.10
6	12/29/2006	6			St. Paul Insurance		3,000.00	-117,176.10
7	12/29/2006	7			American Bar Association		1,935.00	-119,111.10
8	12/29/2006	8			American Red Cross		100.00	-119,211.10
9	12/29/2006	9			Law.com		500.00	-119,711.10
10	12/29/2006	10			State Utility Co-op		2,600.00	-122,311.10
11	12/29/2006	11			Allstate Supplies		1,812.69	-124,123.79
12	12/29/2006	12			Central Parking, Inc.		375.00	-124,498.79
13	12/29/2006	13			Sprint		3,600.00	-128,098.79
14	12/29/2006	14			U.S. Post Office		2,000.00	-130,098.79
15	12/29/2006	15			West Corporation		1,650.00	-131,748.79
16	12/29/2006	16			Ikon		2,525.00	-134,273.79
17	12/29/2006	17			Experts Unlimited		5,000.00	-139,273.79
18	12/29/2006	18			Tennessee Department of Revenue		1,823.61	-141,097.40
19	12/29/2006	19			CCH Fee Service		2,400.00	-143,497.40
20	12/29/2006	20			ADP, Inc.		105,800.00	-249,297.40
21	12/29/2006	21			National Bank		1,700.00	-250,997.40

NOTE: View Checkbook does not allow changes to be made, items to be marked as cleared or voided. It is for informational purposes. See the topics: Reconciling Bank Accounts and Void Checks for details on clearing or voiding items. See the topics Cash Receipts, Quick Checks and Checks for details on entering normal bank account transactions.

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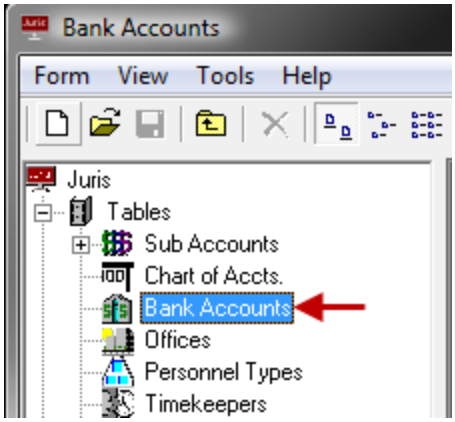
Reconciling a Bank Account

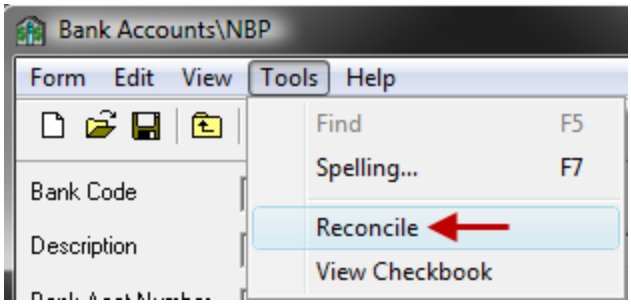
Reconcile Bank Accounts can be used to reconcile your bank accounts in Juris with their respective bank statements. It is designed to be easy to navigate and is also customizable to the your preferences.

1. Select **Tables** > **Bank Accounts**.



2. Double-click the icon or description for the account to be reconciled.

   The Bank Accounts\[bank code] window opens.



3. Select **Tools** > **Reconcile**.

   Several screen customization and navigation options are available:

   - Use the **View** menu to select or deselect the items visible on the reconciliation screen.
   - The columns in the ***Checks and Payments*** list as well as the ***Deposits and other credits*** list may be reordered by dragging and dropping the column headings.

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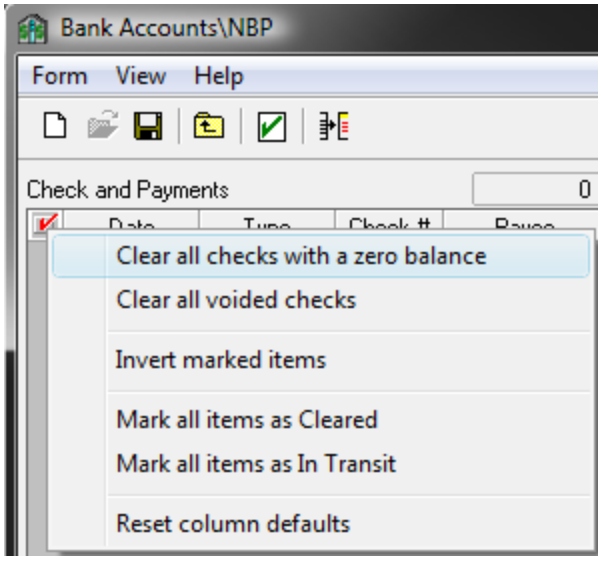
- The details in the ***Checks and Payments*** list as well as the ***Deposits and other credits*** list may be sorted by column by clicking the column heading.
- Right-click on the column headings for more options, including sorting and grouping.
- Right-click on the checkbox shown in the column heading of the ***Checks and Payments*** list as well as the ***Deposits and other credits*** list to view item selection options or to restore the column headings to their default arrangement.



- Use the **View** menu to select or deselect the items visible on the reconciliation screen.
- The columns in the ***Checks and Payments*** list as well as the ***Deposits and other credits*** list may be reordered by dragging and dropping the column headings.
- The details in the ***Checks and Payments*** list as well as the ***Deposits and other credits*** list may be sorted by column by clicking the column heading.
- Right-click on the column headings for more options, including sorting and grouping.
- Right-click on the check box shown in the column heading of the ***Checks and Payments*** list as well as the ***Deposits and other credits*** list to view item selection options or to restore the column headings to their default arrangement.

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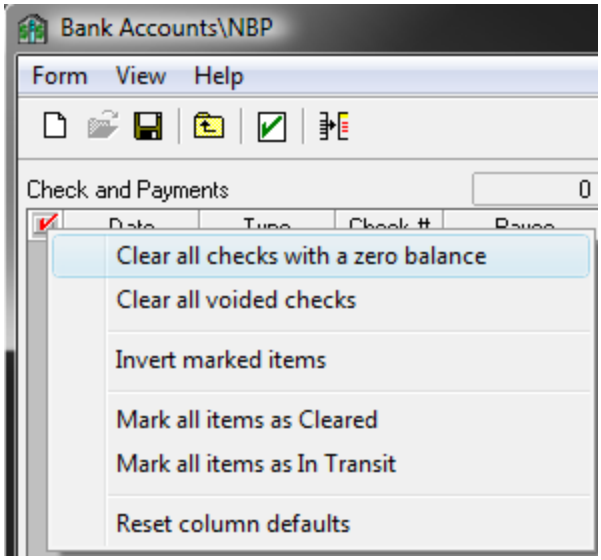

> **TIP:** For Statement Roll forward and Bank Reconciliation detailed descriptions, please refer to the Reconciling Bank Accounts - additional information topic in the help.

4. Enter the appropriate statement date and mark all cleared items as shown on the statement by placing a check mark beside each cleared item.
5. Some entries may appear on the statement that are not listed in Juris in the ***Checks and Payments*** or the ***Deposits and other credits*** list. These entries may be added to the system by clicking the **New** button - or by selecting **Form>New**. The new entry form allows **A/P Check, Trust Check, Deposit, ATM, Reconciling Entry, Bank Charge, Interest Income, Wire Transfer** or **Other** items to be entered. A negative amount entered will place the item on the ***Checks and Payments*** side and a positive amount entered will place the item on the **Deposits and other credits** side.

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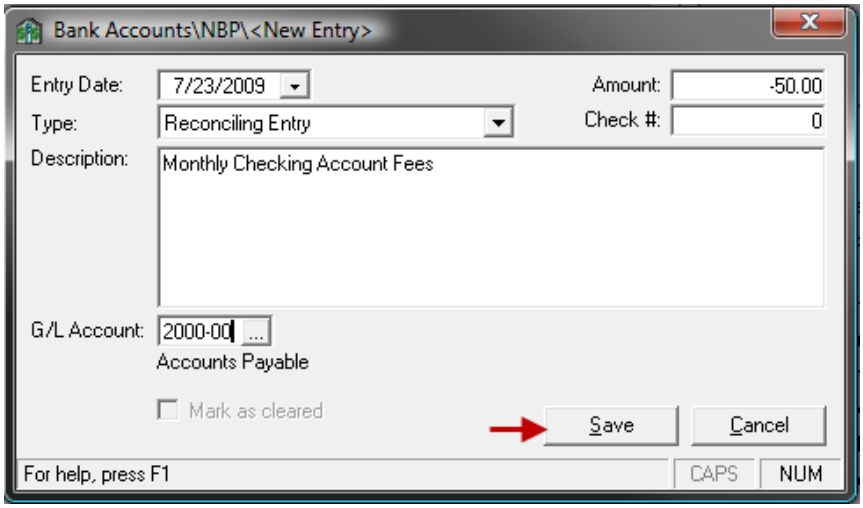

> **NOTE:** Entries **cannot** be removed from the check register, and can only be reversed by entering a second, **offsetting** entry. Make sure that the following information on new entries is correct before saving.

- **Entry Date**
- **Amount** (may be positive or negative)
- Type (**A/P Check, Trust Check, Deposit, ATM, Reconciling Entry, Bank Charge, Interest Income, Wire Transfer or Other**)
- **Check #** (if applicable)
- **Description**
- **G/L Account**

6. When the **Unreconciled Difference** is = 0, then the **Reconcile** option will become enabled. Click the **Reconcile** button on the toolbar or select **Form>Reconcile**.

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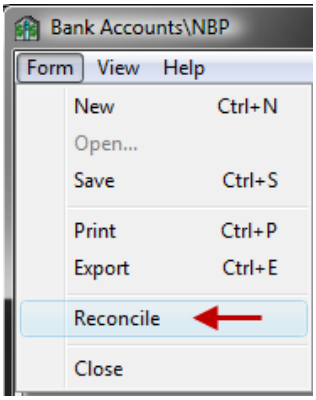

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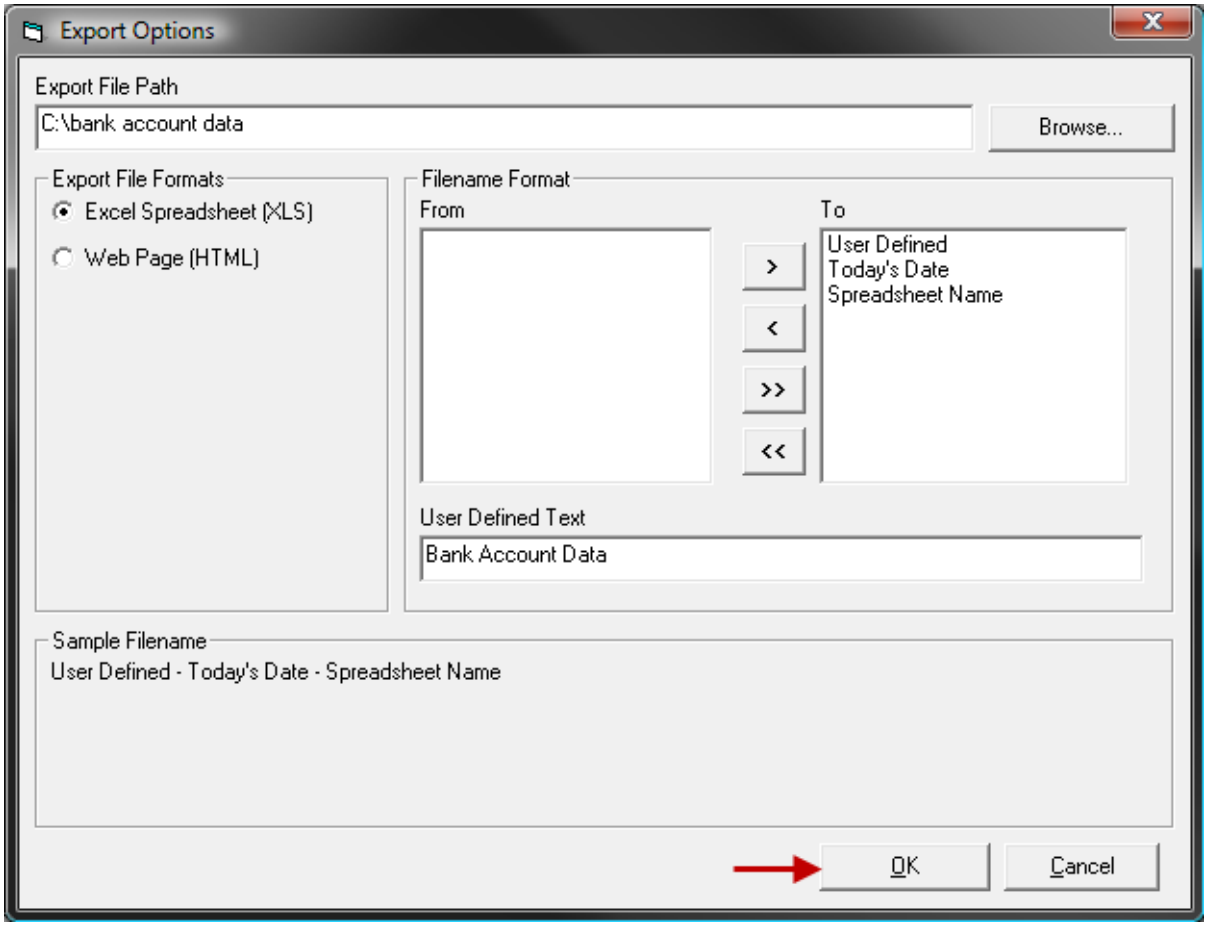
Export Items to Excel

1. The **Export Items to Excel** option may be accessed by clicking the **Export** button or by selecting **Form**> **Export**. You can also use keystroke **Ctrl + E**.
2. Enter the export file path or use the **Browse** button.
3. Select the file name format **From**. Use the arrow buttons to move the information.
4. Enter the **User Defined Text**.
5. Click the **OK** button.



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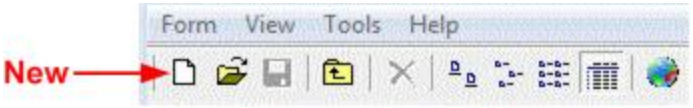
Manage payments for vendors

Payment vouchers are used to record payments to vendors. Once posted, these payments can be processed and printed using the Checks feature. Expenses may be distributed to clients and matters at the time they are entered into the system. Vouchers and journal entry templates can be associated with one or more schedules.

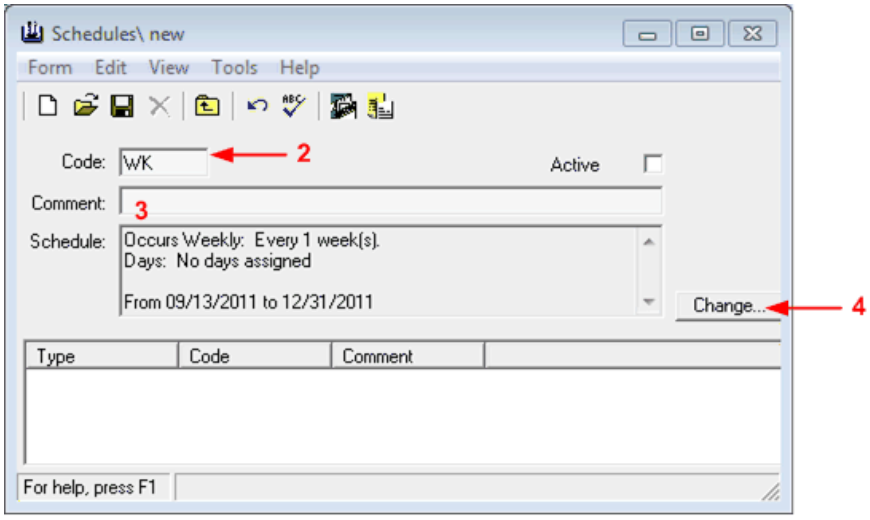
Create a new Schedule

Vouchers may be assigned to schedules. Follow these steps to create a schedule.

1. Launch the **Juris** application, and then select **Transactions**, then **Recurring Transactions**, then **Schedules**. On the **Schedules** window, click the **New** icon.



2. A new **Schedules** window displays. Enter a unique code in the Code field.



3. Enter a comment in the **Comment** field.
4. Click the **Change** button to set the schedule details.
5. On the **Change Schedule Information** form popup, select the frequency in the **Occurs** column on the left, and indicate the schedule details on the right.

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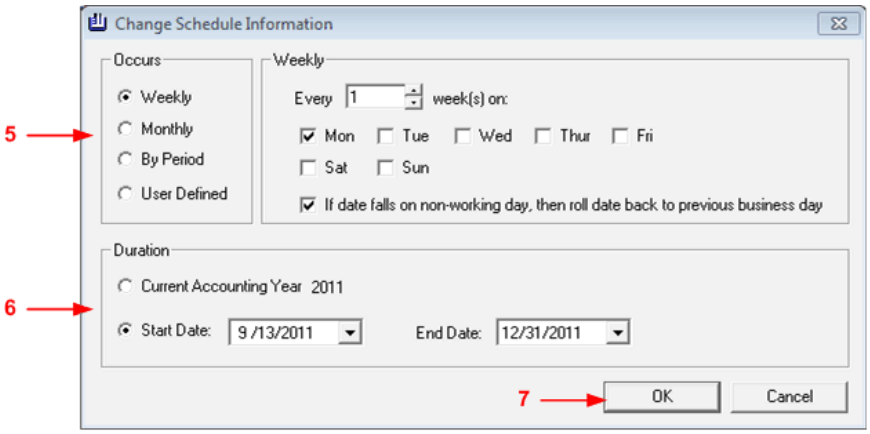

6. Click the appropriate selection in the Duration area. The form allows you to indicate if the duration should be for the current accounting year, or a defined interval between a **Start Date** and an **End Date**.
7. Click **Ok** to complete your setup and close the form.
8. **Save** your changes on the new schedule form.

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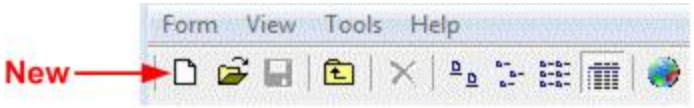
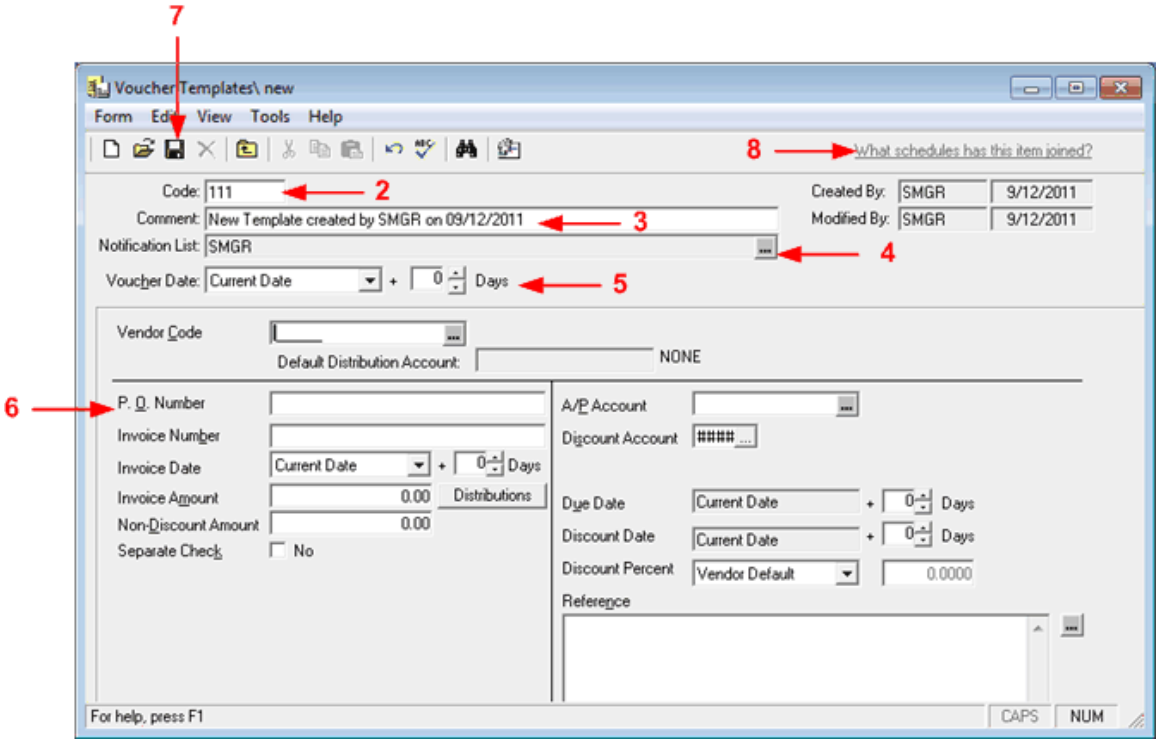
Create a voucher template

To create a Voucher Template:

1. Launch the **Juris** application, and then select **Transactions**, then **Recurring Transactions**, then **Voucher Templates**. On the **Voucher Templates** window, click the **New** icon.



2. A new **Voucher Template** form displays. Enter a unique code to identify the voucher in the **Code** field.



3. The system displays a comment in the **Comment** field. You can accept it, or edit if necessary.

4. Define a **Notification List**, if appropriate. These are the users who will be notified that the template exists. To assist in identifying users to include, users may be selected from the selection list by clicking the Lookup button. Juris requires that at least one user be added to the list.

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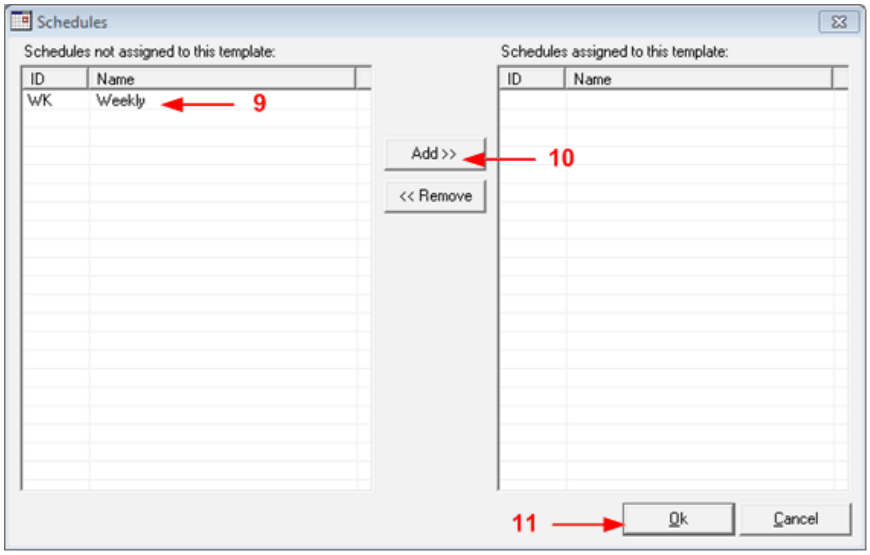
5. Select a date option in the **Voucher Date** field. If you select Current Date, the voucher will contain today's date. If you select **Scheduled Date**, the voucher will use the date based on the schedule that the transaction has been assigned.
6. Complete the form using the vendor, invoice, and account information appropriate for the template you are creating.
7. **Save** your changes.
8. Templates do not have to be assigned to a schedule, however, if the template is to be assigned to an existing schedule, add the template to the existing schedule by clicking on **What schedules has the item joined?** in the top right corner of the form.
9. Highlight the schedule in the left pane of the **Schedules** popup.



10. Click the **Add** button.
11. Note that the schedule has moved to the right pane. Associate the voucher with as many schedules as is appropriate. Click the Ok button to close the window.
12. If the template is to be assigned to a new schedule that does not exist, create a new schedule, and then add the template to the schedule.
13. **Save** your changes.

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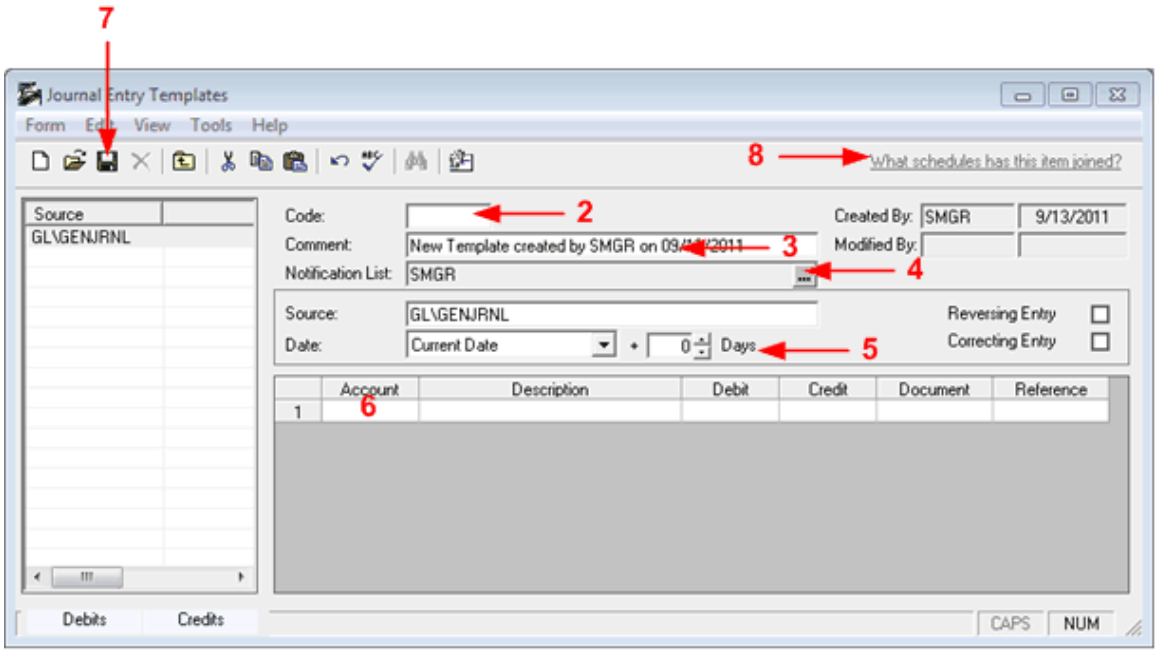
Create a journal entry template

1. Launch the **Juris** application, and then select **Transactions**, then **Recurring Transactions**, then Journal Entry Templates.
2. On the resulting **Journal Entry Templates** window, click the **New** icon. A new **Journal Entry Template** is displayed. Enter a unique code to identify the journal entry in the **Code** field.



3. The system displays a comment in the **Comment** field. You can accept it, or edit if necessary.
4. Define a notification list in the **Notification List** field, if appropriate. These are the users who will be notified that the template exists. Users to include on the list may be selected from the selection list by clicking the Lookup button. Juris requires that at least one user be added to the list.
5. Select a date option. If you select **Current Date**, the voucher will contain today's date. If you select Scheduled Date, the journal will use the date based on the schedule that the transaction has been assigned.
6. Complete the form using the information appropriate for the template you are creating. In the first available row, double-click in the empty Account field, then select the

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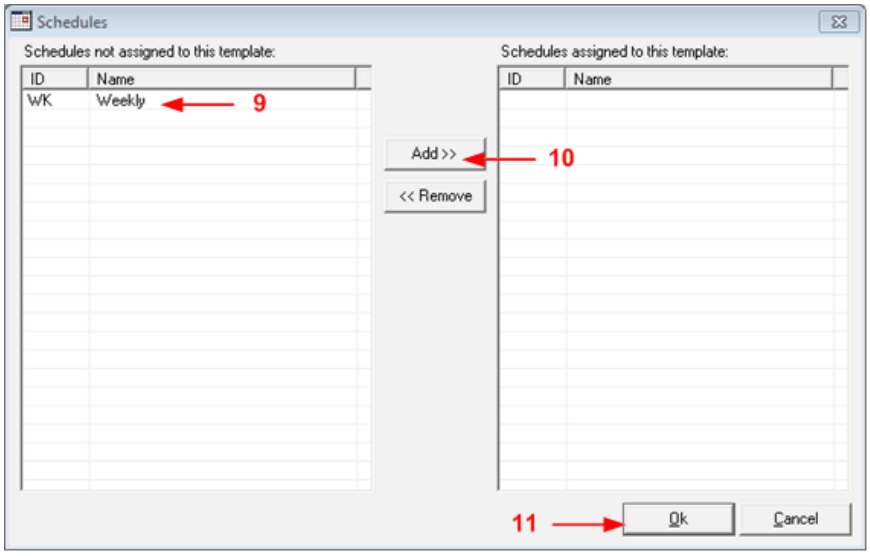
appropriate account from the list of accounts. The corresponding fields for the selected account will populate the form row.

7. **Save** your changes.
8. Templates do not have to be assigned to a schedule, however, if the template is to be assigned to an existing schedule, add the template to the existing schedule by clicking on **What schedules has the item joined?** in the top right corner of the form.
9. Highlight the schedule in the left pane of the **Schedules** popup.



10. Click the **Add** button.
11. Note that the schedule is now displayed in the right pane. Associate the voucher with as many schedules as is appropriate. Click the **Ok** button to close the window.
12. If the template is to be assigned to a new schedule that does not exist, create a new schedule, and then add the template to the schedule.
13. **Save** your changes.

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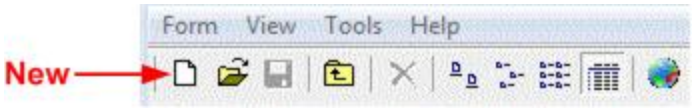
Record a voucher for payment

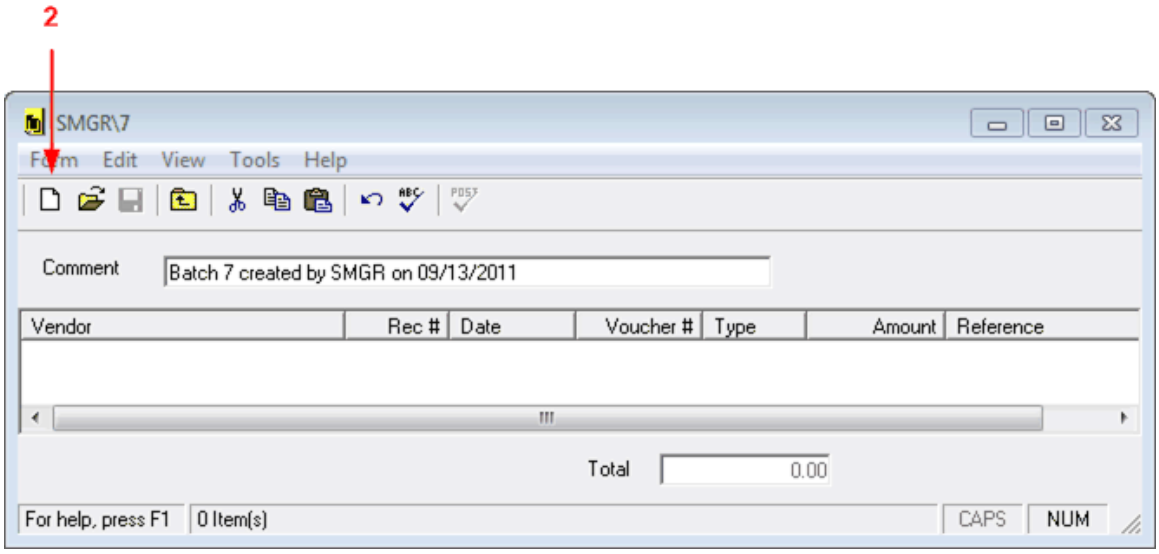
When a voucher is received from a vendor, it can be recorded for payment.

To record a Payment Voucher:

1. Launch the **Juris** application, and then select **Transactions**, then **Payment Vouchers**. A **Payment Vouchers** list window displays. Click the **New** icon.



2. Click the **New** icon on the Batch form to add a new voucher.



3. A new voucher form displays. Enter the date of the voucher in the **Voucher Date** field.

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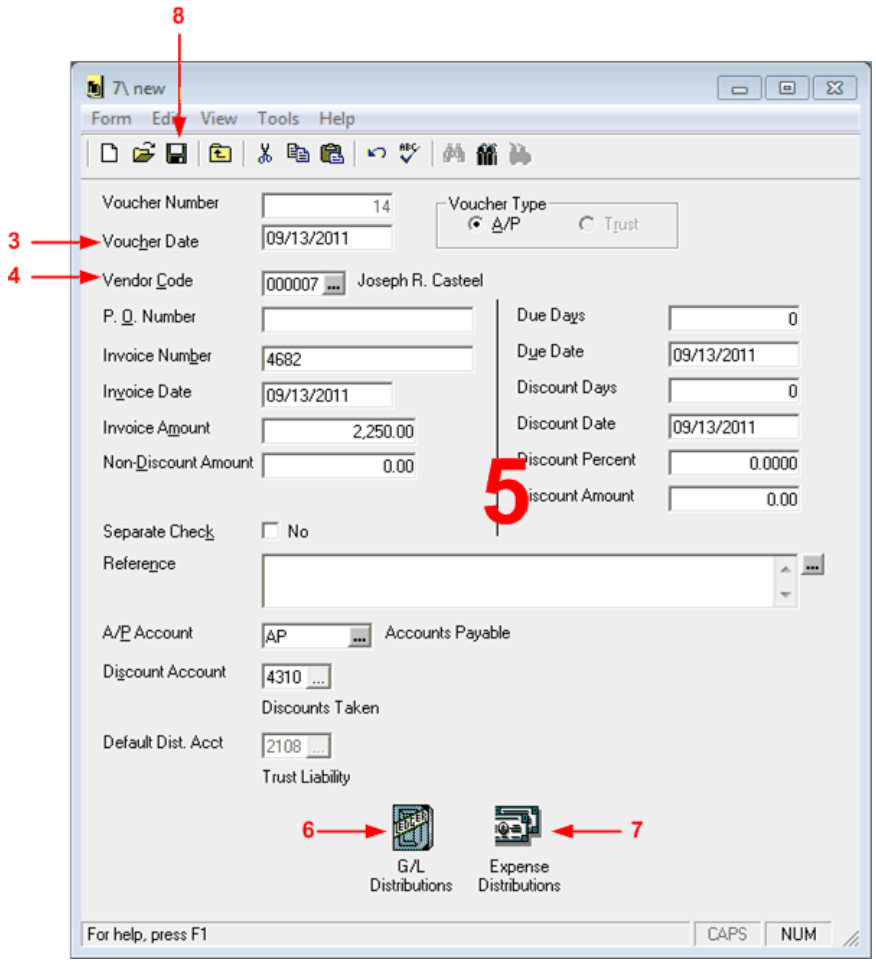

4. Select the vendor in the **Vendor Code** field.
5. Enter the information appropriate for your voucher.
6. If you click the **GL Distributions** icon, you will see that Juris has distributed the amount to the correct account as defined on the vendor associated with the voucher.
7. If you want to assign the expense back to the client for reimbursement, click the **Expense Distributions** icon and complete the form.
8. **Save** your changes.
9. If the voucher is ready to be posted, select the batch from the list, post it, and then select **Tools**, then **Ready to Post**.

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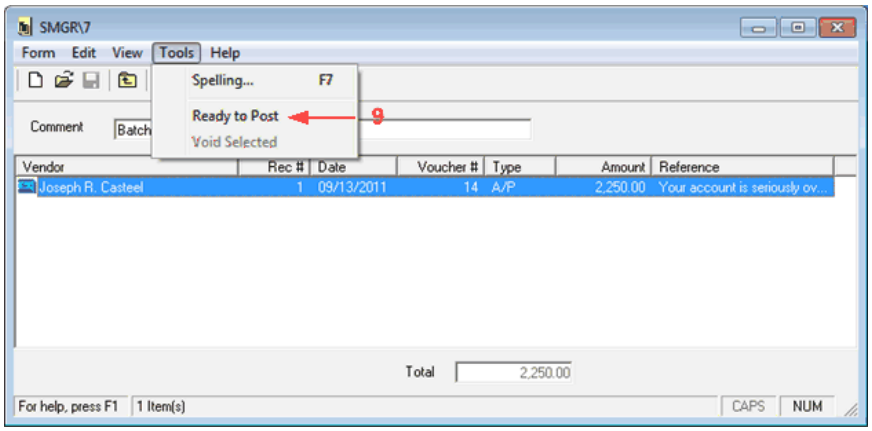

10. The voucher, or vouchers, is posted.

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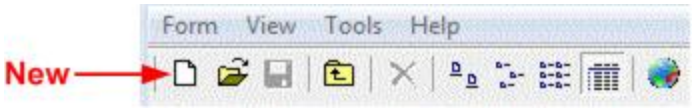
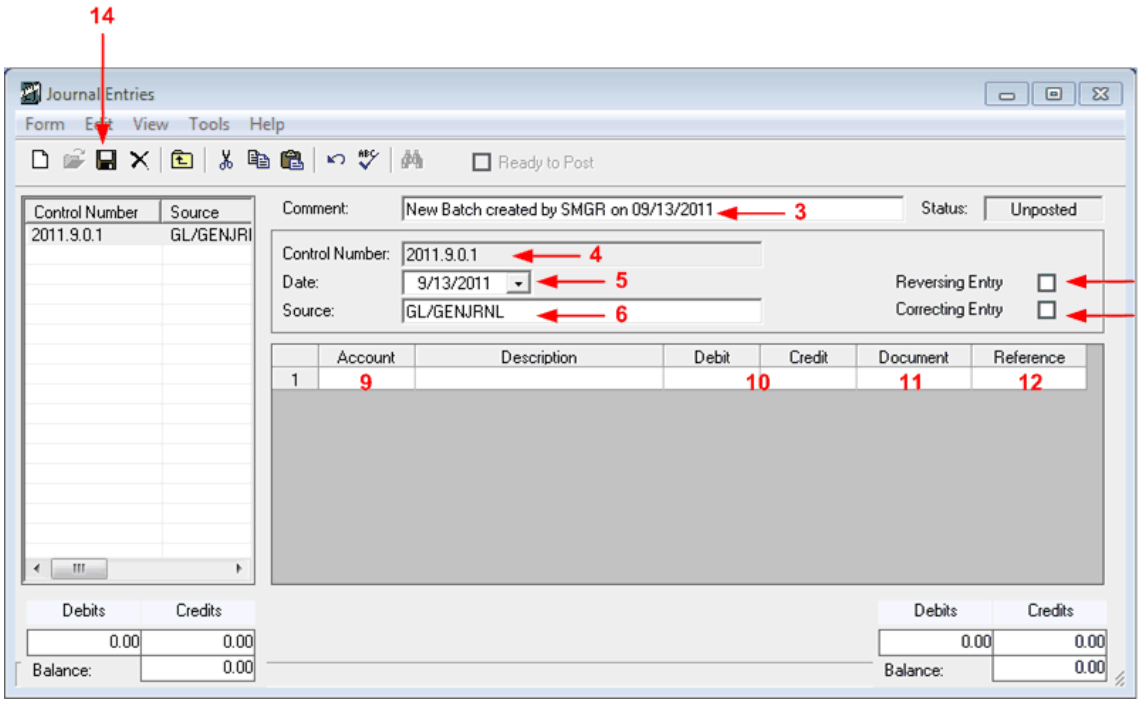
Record a journal entry

Before a journal entry can be made, an account must be created in the Chart of Accounts.

1. Launch the **Juris** application, and then select **Transactions**, then **Journal Entries**. On the **Journal Entries** window, click the **New** icon.



2. If you want to add the journal entry to an existing batch, double-click that batch.
3. Name the new batch in the **Comment** field.



4. The Control Number is supplied by Juris and cannot be changed.
5. A **Date** is supplied by the system; however, you can change the date if necessary.
6. Enter a source where the batch was originated in the **Source** field.
7. Check **Reversing Entry**will result in the system creating a second opposite entry with a date of the first next accounting period.
8. Check **Correcting Entry** if the journal entry corrects a previous entry that was incorrect. This information is used by cash flow statement reporting.

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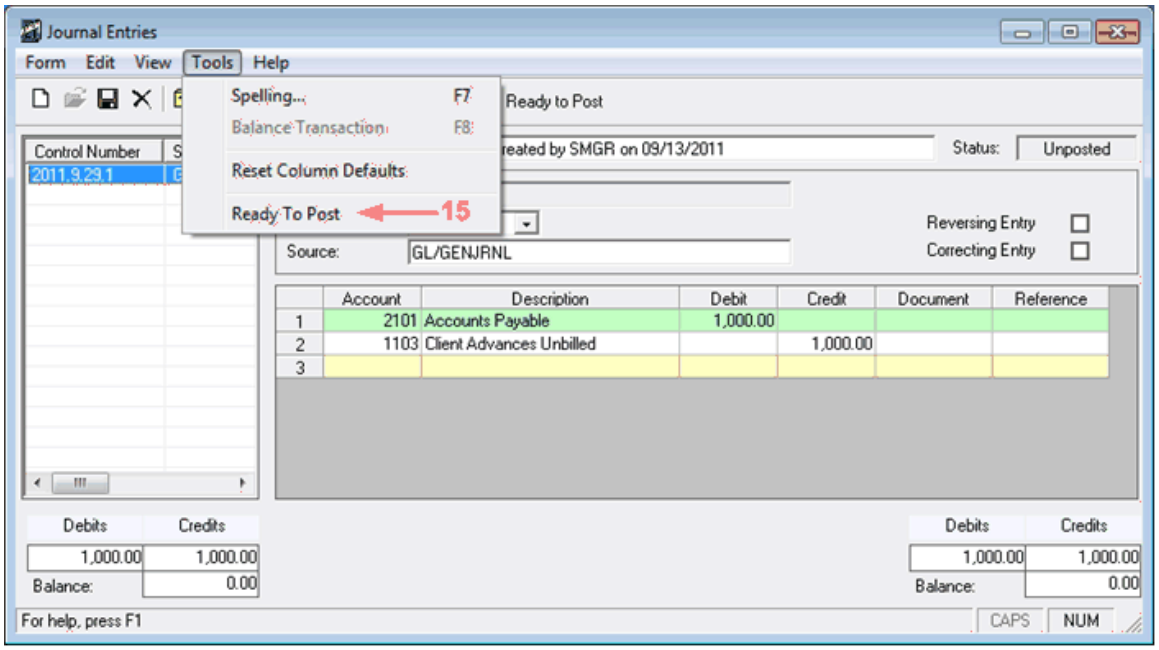
9. Enter a valid account number in the **Account** column and the description will populate automatically.
10. Enter a **Debit** or **Credit** amount, as appropriate.
11. Enter a document number in the **Document** column. This may be up to 60 characters.
12. Enter a reference description in the **Reference** column. This may be up to 60 characters.
13. Repeat this process for every debit and credit needed for the journal item. Note that Juris will allow an unfinished item to be saved but not posted.
14. **Save** your changes.
15. If the entry is **Ready to Post** (the total of the debits equals the total of the credits), post the batch.



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Expense entry and tracking

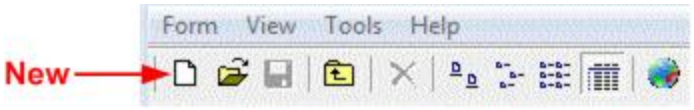
The following codes are used for tracking expenses:

- Expense Codes
- Cross Referencing Expense Codes

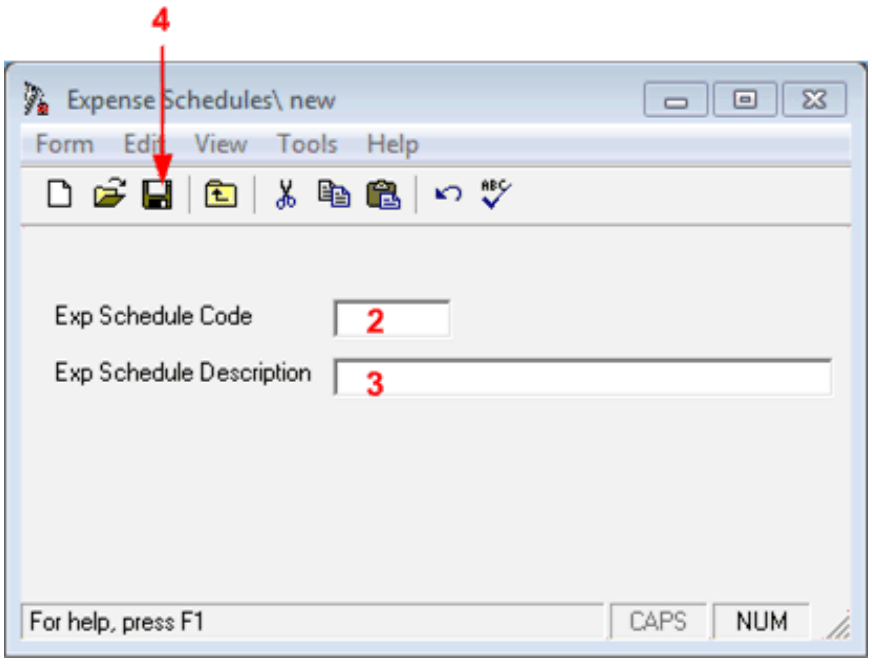
Setup an Expense Schedule

To setup an Expense Schedule:

1. Launch the **Juris** application, and then select **Tables**, then **Expense Schedules**. A list of expense schedules displays. Click the **New** icon.



2. A new **Expense Schedule** form displays. Enter a 1-4 character alphanumeric name in the **Exp Schedule Code** field.



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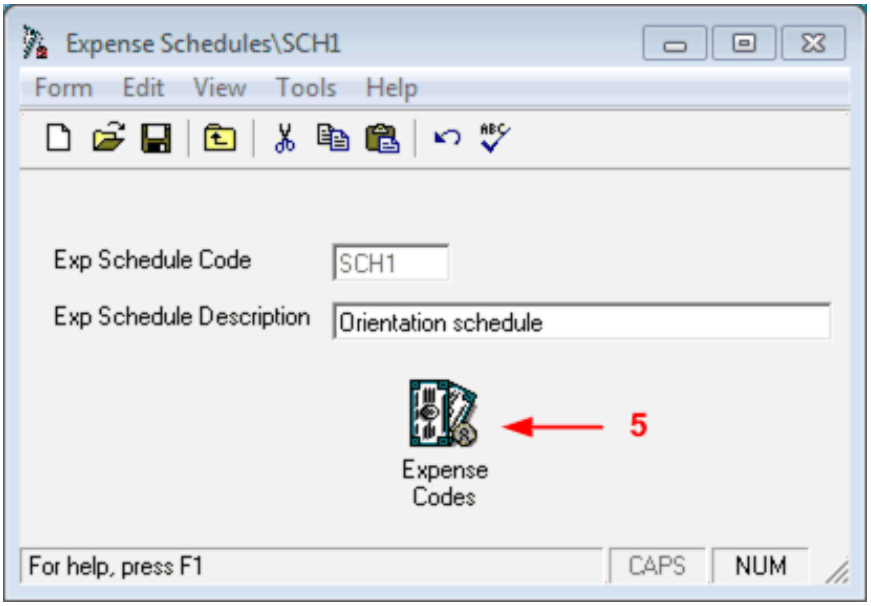
3. Enter a 1-30 character alphanumeric description in the **Exp Schedule Description** field.
4. **Save** your changes. An **Expense Codes** icon appears at the bottom of the form once your information is saved.
5. Click the **Expense Codes** icon.



6. Enter one, or more, of your firm's expense codes in the **Code** column. A list can be obtained by clicking in the field, then clicking the **Lookup** button.

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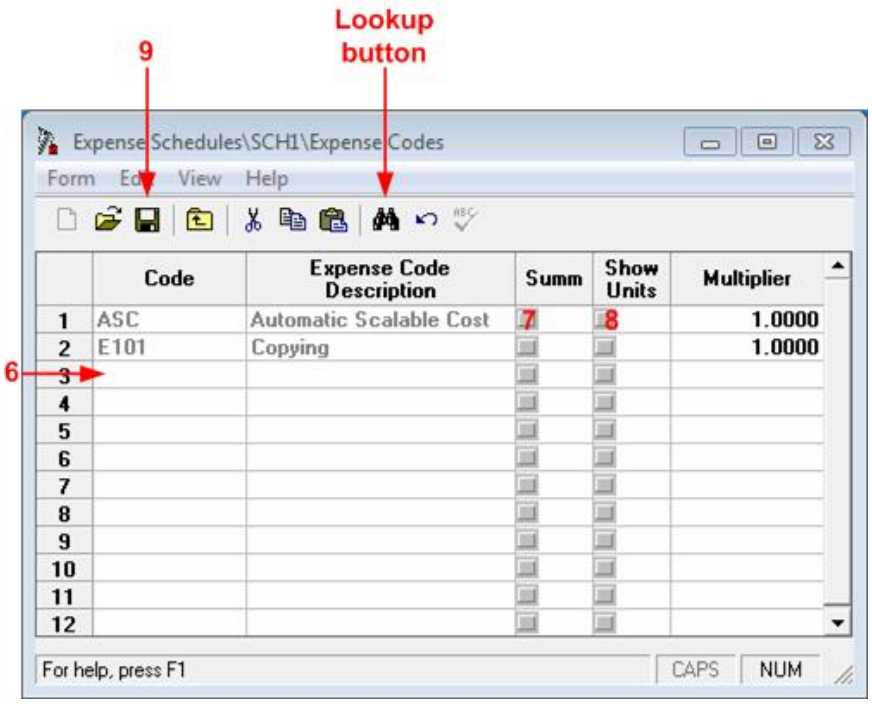

7. Click to check in the **Summ** column if the amounts must be summarized.
8. Click to check in the **Show Units** column to show monetary units for the code. Define a Multiplier.
9. **Save** your changes.

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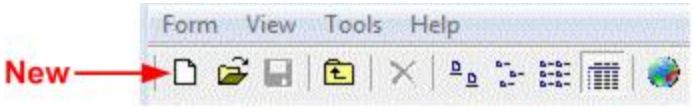
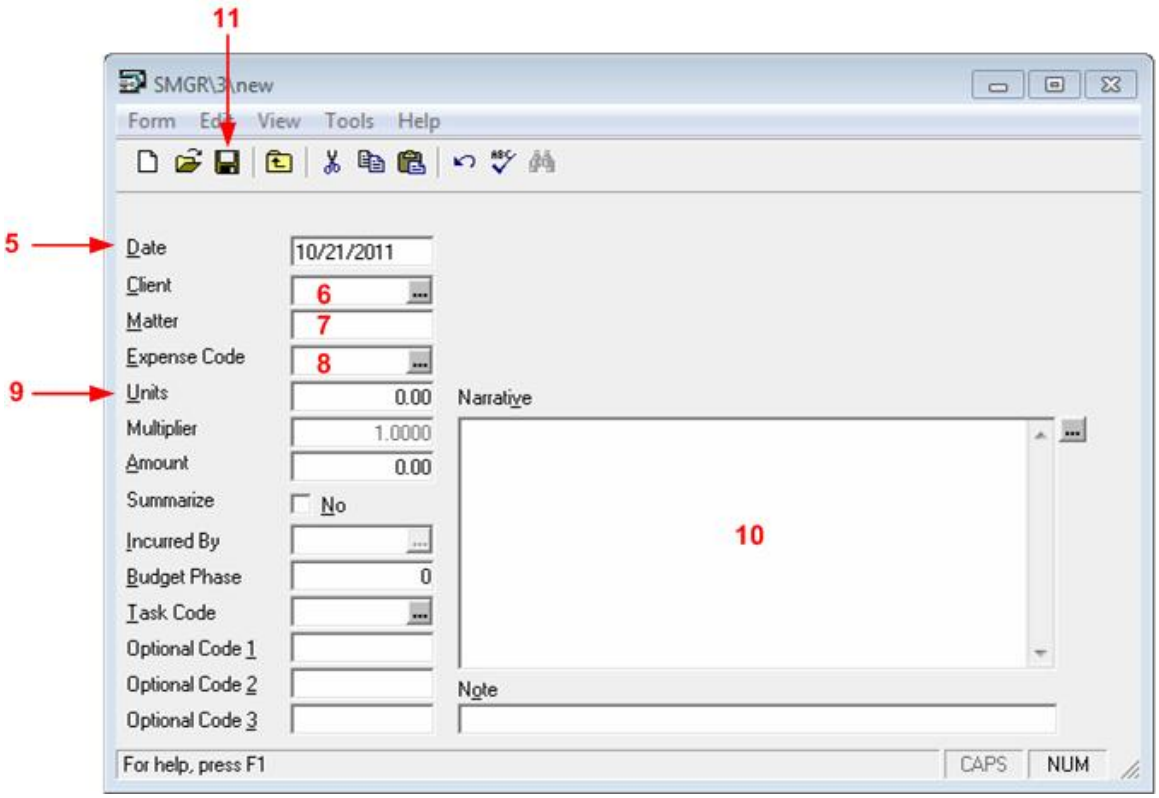
Record an expense

1. Launch the **Juris** application, and then select **Transactions**, then **Expense Entries**. A list of expense entries is displayed. Click the **New** icon.



2. Choose to create a **Normal** batch, **Direct** batch, or **Adjustment** batch.
3. Click **Ok** to continue. A new **Expense Entry** form is displayed.
4. Click the **New** button again to enter the expense.
5. Accept the default current date or select a new date in the **Date** field.



6. Select a client from the drop down menu in the **Client** field.
7. Select the **Matter** using the Lookup icon.
8. Select the appropriate expense code from the drop down list in the **Expense Code** field.
9. Enter the appropriate **Units** for the expense.

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10. Enter identifying information in the **Narrative** field.
11. **Save** and close the expense entry.
12. Review the batch summary to verify your entry.
13. **Save** the batch.

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Post the expense entry batch

Once finalized, expense batches are posted to indicate that billing can start.

1. Launch the **Juris** application. Select **Transactions**, and then **Expense Entries**.
2. Select the batch to be posted.
3. Select **Tools**, and then **Post**.

> **NOTE:** Once the batch is posted, the batch status changes to Posted.

Using Attachments

File attachments can be added to expense entries within Juris. Proceed to one of the following topics below for more information:

- Using Expense Attachments
- Using Payment Voucher (Expense Distributions) Attachments
- Deleting Attachments

About Support File Formats

Most file formats are supported for use as attachments including, but not limited to, the following:

- PDFs
- Microsoft Word documents (.doc and .docx)
- Microsoft Excel spreadsheets (.xls and .xlsx)
- Graphics files (.jpg, .gif, .png, etc.)

> **NOTE:** Attachments are not included in eBilling.

Using Expense Attachments

File attachments can be added to expenses using the **Attachment(s)** text box.

Once added, an attachment icon appears in the first column on the expense's main dialog box.

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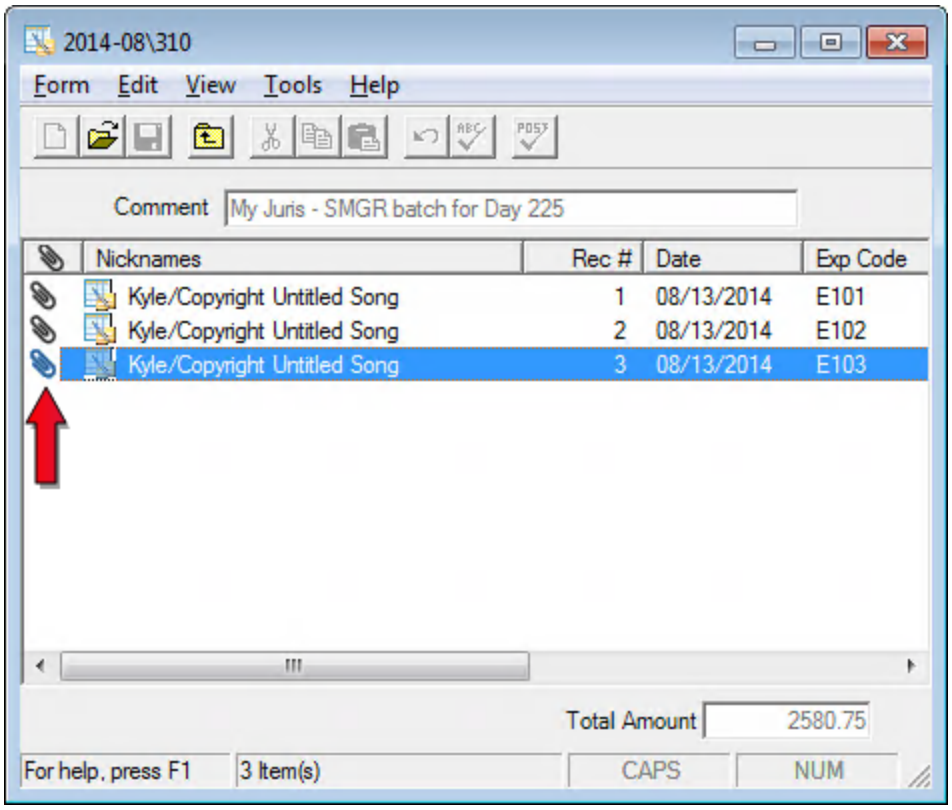

You can view attachments by double-clicking an expense on the main expense dialog box, and then double-clicking the attachment itself in the **Attachment(s)** text box on the expense details dialog box.

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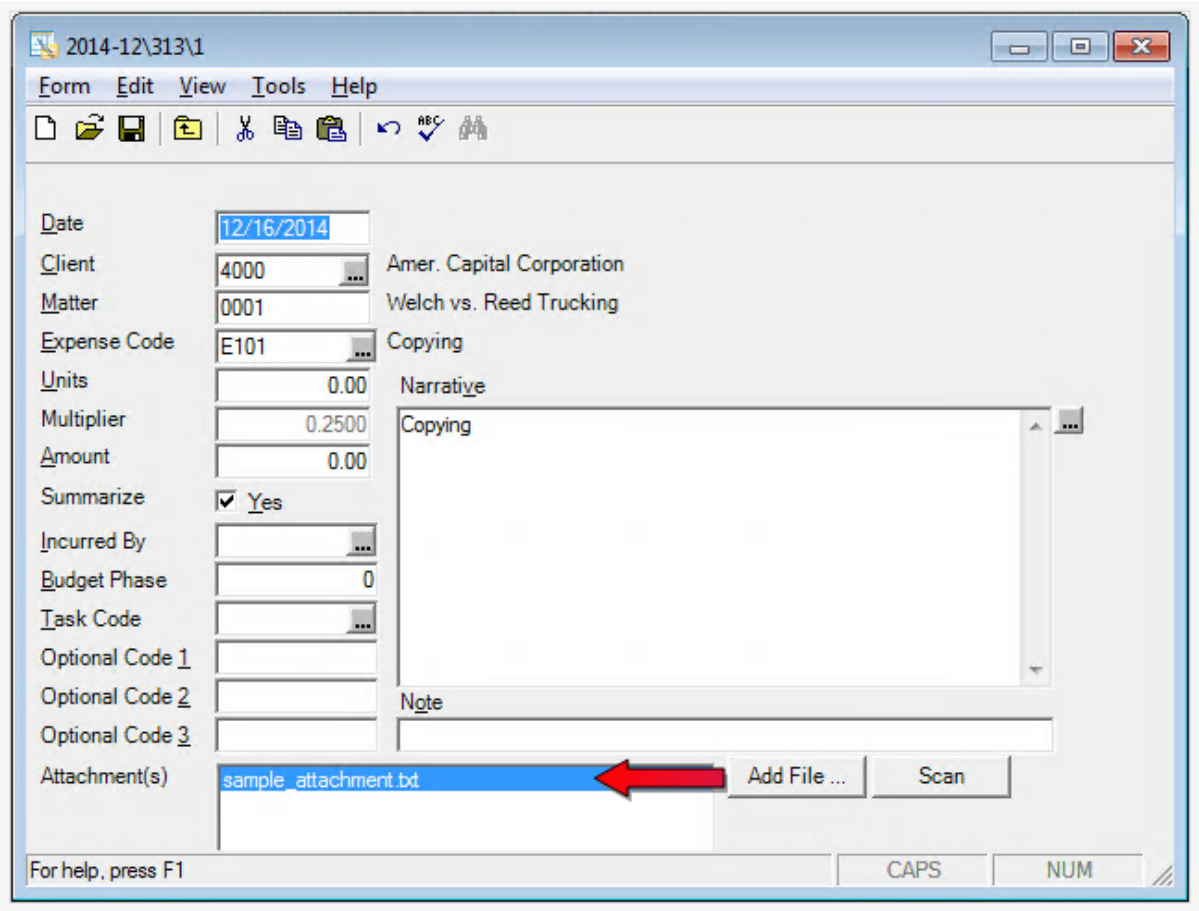

Even if an entry has been posted, its attachments can still be viewed. However, no changes can be made to the attachment.

Using Payment Voucher (Expense Distributions) Attachments

Attachment's can be added to a payment voucher via the voucher's expense distribution.

1. Access the **Expense Distributions Batch** dialog box by double-clicking the **Expense Distributions** button on the payment voucher dialog box.

   The **Expense Distributions Batch** dialog box appears, showing all defined expense distributions. If the batch contains an attachment, an icon appears in the left column (as highlighted below).

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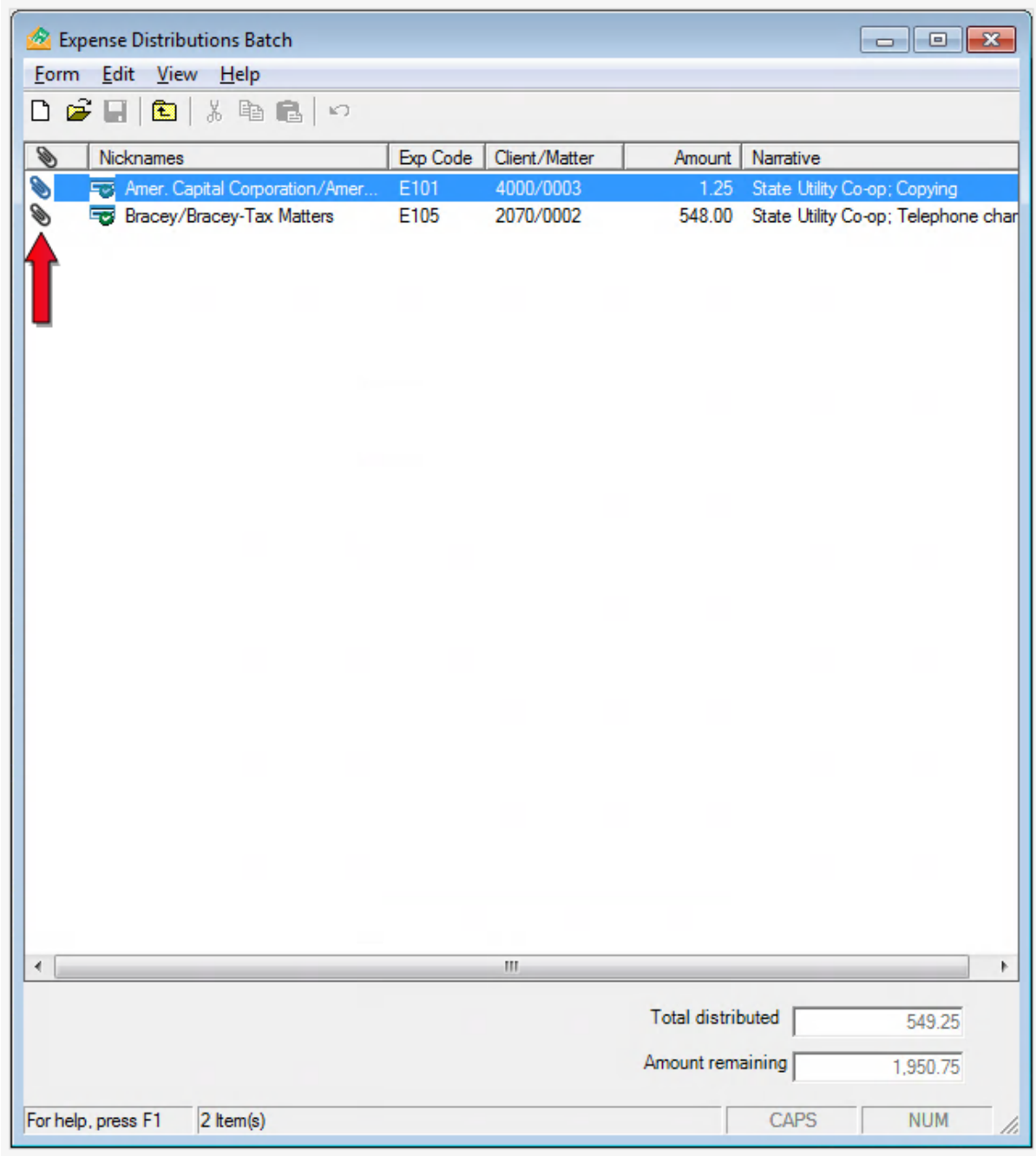

2. Double-click an existing batch to open it, or click the **New** button to create a new batch.

   The Expense Distribution dialog box appears. Attachments can be viewed or added using the **Attachment(s)** text box at the bottom of the dialog box.

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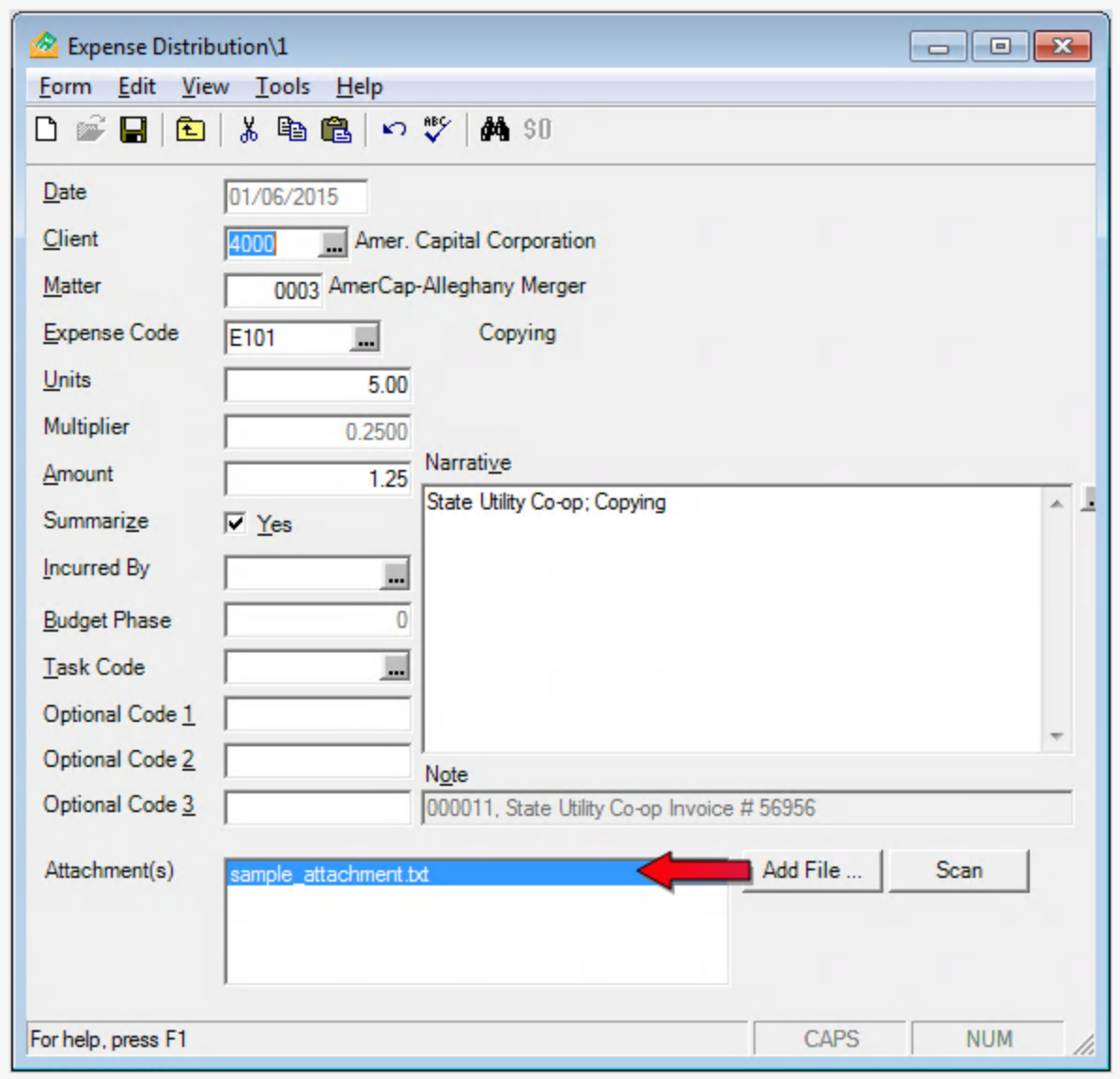

Deleting Attachments

You can remove attachments using either of the following methods, based on the current status of the entry:

- If an expense entry is posted, you can delete the attachment using an adjusting entry.
- If entry is not posted, within the batch itself, you can select the attachment in the **Attachment(s)** text box and click the **DELETE** key on your keyboard.

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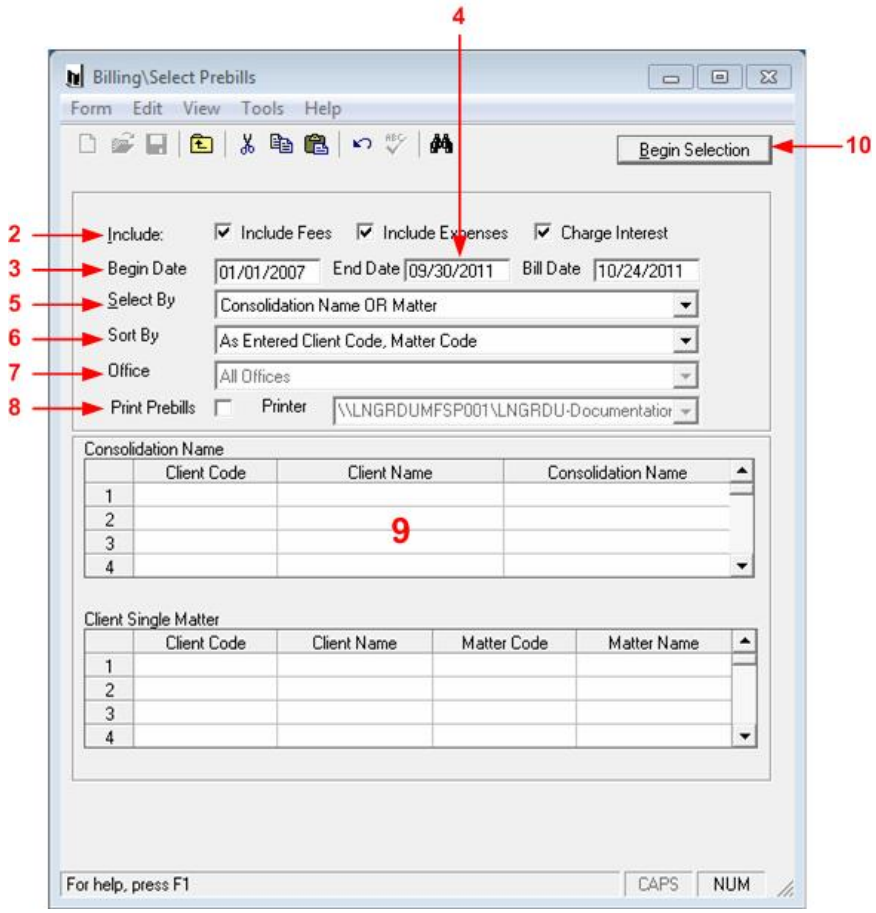
Set up and generate bills

Select and distribute prebills

To select and distribute prebills:

1. Launch the **Juris** application, and then select **Billing**, then **Select Prebills**.
2. Click to check **Include Fees**, **Include Expenses**, or **Charge Interest** to specify the type of data to be included in the prebill calculations.



3. Accept or change the default Begin Date.
4. Note that the End Date is set to the end of the current period.
5. Select the criteria for choosing prebills from the **Select By** drop down menu.

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6. Choose a sort option from the **Sort By** drop down menu. This will determine the sort order of the bills as they are printed.
7. Indicate offices to be included in the **Office** drop down menu, if appropriate.
8. Click to check **Print Prebills** and choose the printer.
9. The lower portion of the form varies depending on the selection you made in the Select By field. Use the fields that are displayed to narrow your selection.
10. Click **Begin Selection**.
11. Review the prebills selected.

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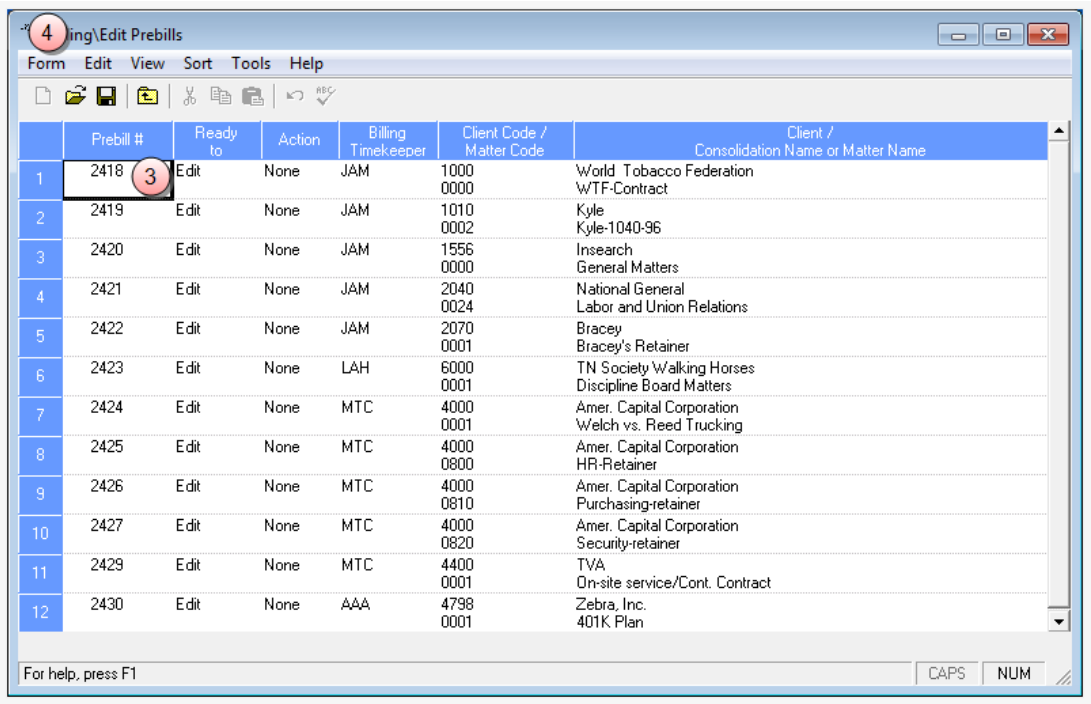
Edit a Prebill

Edit Prebills is the area where the data on the prebill may be modified based on the attorney's needs. A Prebill's Status may be viewed at any time on the Prebill List Form which is displayed when first selecting Edit Prebills.

To Edit a Prebill:

1. Select **Billing**.
2. Double-click the **Edit Prebill** icon in the right pane.

   The Billing\Edit Prebills window opens.



3. Optionally, select **View** > **Filter** to specifically define which prebills to list in the Prebill list.

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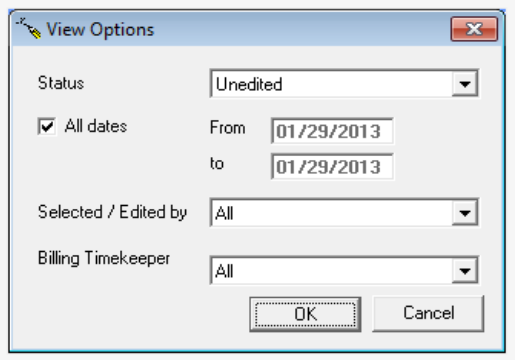


The filter option allows the Index to filter bills by their Status, Date Range, User Selected/Edited By, Billing Timekeeper combinations of these criteria.

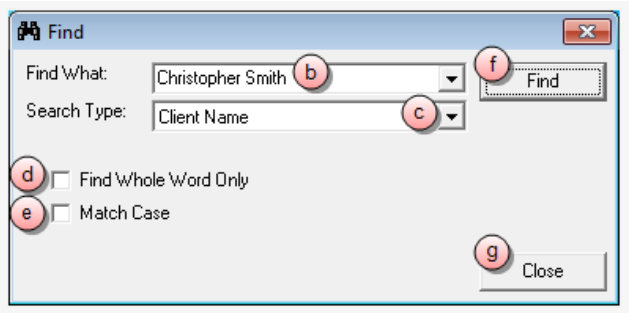
4. Scroll through the list to find the prebill you want to edit,

   OR

   Use the **Find** tool to search for it.

   The find feature may be used to find any information in the prebill edit screen, including any data fields on the bill design. Text fields on the bill design are ignored.

   To use Find:



   a. Select **Tools** > **Find** from the Prebill window menu.

   b. In the **Find What** box, type the text you want to search for.

   c. Click on the **Search Type** box arrow, and select the type of information the text applies to.

   d. Click on the **Find Whole Word Only** check box to select it, if you want to specify that the results match the whole term you have entered.

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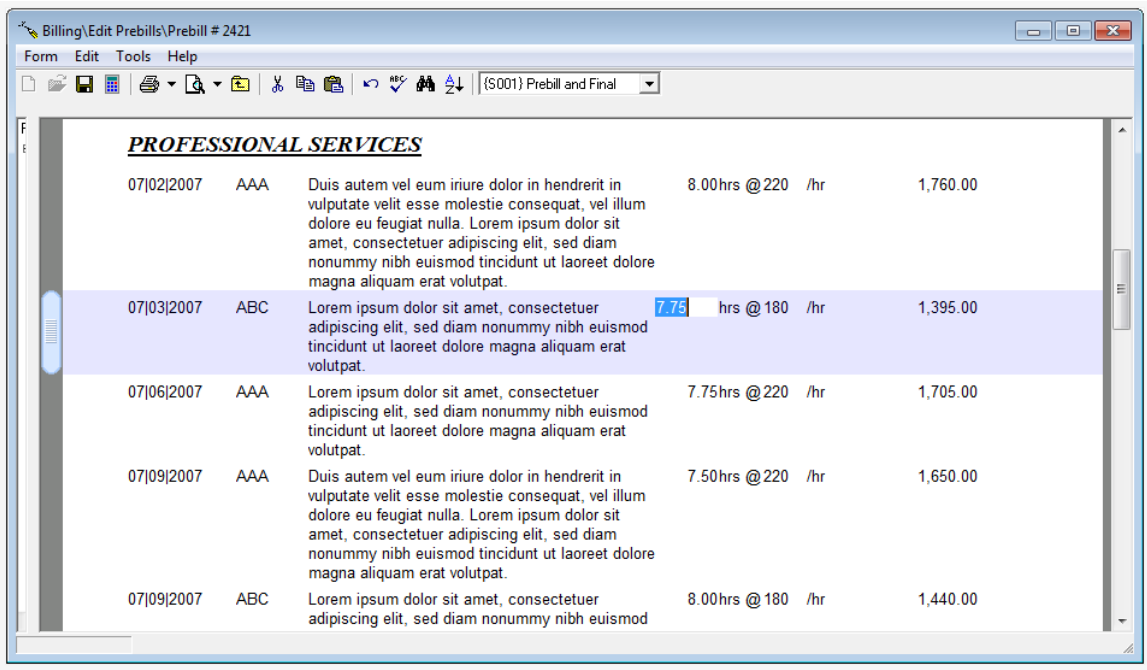
e. Click on the **Match Case** check box to select it, if you want specify that the results match the capitalization that you have entered.

f. Click **Find** to begin the search process.

The results are displayed in the Billing\Edit Prebills window list.

g. Scroll through the list to find the prebill you want to edit.

5. Select **Form** > **Open** to open the prebill in the Billing\Edit Prebill\Prebill # [number you selected] window.



In this window you can perform a *simple edit* on any entry under the Professional Services section of the Prebill, or perform an *edit on fee or expense detail items*. The steps below are for simple entry level edits. If you need to edit fee or expense detail items, please see the Edit fee and expense detail items topic in the help for instructions - begin with step 2 in that topic.

> **NOTE:** Only certain parts of the entries listed under the Professional Services section of the prebill are editable; the date, text, hours or expenses and amount. You cannot edit any of the Balance Summary section data or totals.

6. Click on the entry field you need to edit, and then type your change.

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If invalid data is accidentally entered, press the ESC key on your keyboard to revert field back to the original value.

> **TIP:** Save periodically when editing items on a prebill as no changes are saved until the prebill is saved. The system will prompt to save all changes when exiting the prebill edit template, but it is a good practice to save after making an edit to assure that changes are not inadvertently lost.

7. Optionally, right-click on the blue area of an entry to access other options such as:

Edit

This option is used to edit fee and expense detail items. Please see the Edit fee and expense detail items topic for instructions - begin with step 2 in that topic.

Bill

This option is used to indicate that the item is OK to be included and shown on the current bill. This is the default option.

Suppress

This option prevents the Fee or Expense entry from printing on the bill, but the value of the item is still included in the bill's total.

Hold

This option prevents the Time or Expense entry from being printed on the bill and from being included in Bill balances. The held items still exist in Unbilled Time and Unbilled Expense; and it shows up on the prebill the next time a prebill for that matter is selected, as long as the entry falls within the date range of the selection criteria.

Mark Off

This option marks the entry down to zero. Mark Off entries are suppressed on the bill, and they are not printed.

Delete

This option deletes the item from the bill and from the unbilled tables so that it may not be selected again in the future.

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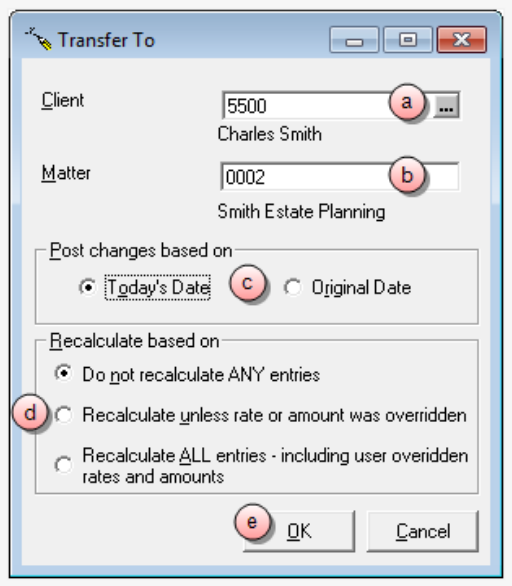
WIP Transfer (Work In Process)

This option can be used to transfer the time or expense entry to another matter. When selected, a Transfer To window opens (see image below). Please see step

You must select the Client and Matter to transfer to, and must also determine if the changes should be based on the period of today's date or the period of the original date of the time or expense entry.



a. In the **Client** box, type the client code, or click the ellipses button to search for the client in a finder window.

b. In the **Matter** box, type the matter code for the appropriate matter.

c. Click on the **Post changes based on** date option you want to use.

   If Today's Date is selected, the system enters the change using the period of the computer's current system date. Transferring an item in a period other than the current period is only allowed if you have the permission to work in prior periods.

d. Click on the **Recalculate based on** option you want to use. You can also choose from 3 recalculate options.

   - **Do not recalculate any entries** transfers the item just as it is in the current prebill, regardless of the fee and expense schedules assigned to the new matter.

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- **Recalculate unless rate or amount were overridden** recalculates the entry based on the new matter's fee or expense schedule, unless the rate or amount for the entry were overridden in Transactions or in Edit Prebills.
- **Recalculate all entries – including user overridden rates and amounts** recalculates all entries based on the new matter's fee or expense schedule.

e. Click **OK**.

A WIP Transfer General Warning window opens.

f. Click **Yes** to continue.

You are asked if you want to add the entry (or entries) to the existing prebill.

g. Click **Yes** to add the entry to the existing Prebill.

The line item is removed from the prebill.

> **NOTE:** Multiple items may be selected for Edit, Bill, Suppress, Hold, Mark Off, Delete, or WIP Transfer. To do this, hold the **Ctrl** or **Shift** key while clicking on the blue handle to the left of each item. After all items have been selected, select the option to apply (Edit, Bill, Suppress, Hold, Mark Off, Delete, or WIP Transfer). You can only click on multiple items within the same group; the system does not allow items in different groups to be simultaneously selected.

Quick Sort

The sort option lets you modify the sorting for the items on that particular bill. When select, the Sort/Group options window shows the sorting as defined by the bill format. You can modify the sorting if needed. When you modify, it only affects the current bill; it does not change the sorting on the bill format.

> **NOTE:** Running the quick demand sort will undo any drag and drop edits that may have been made.

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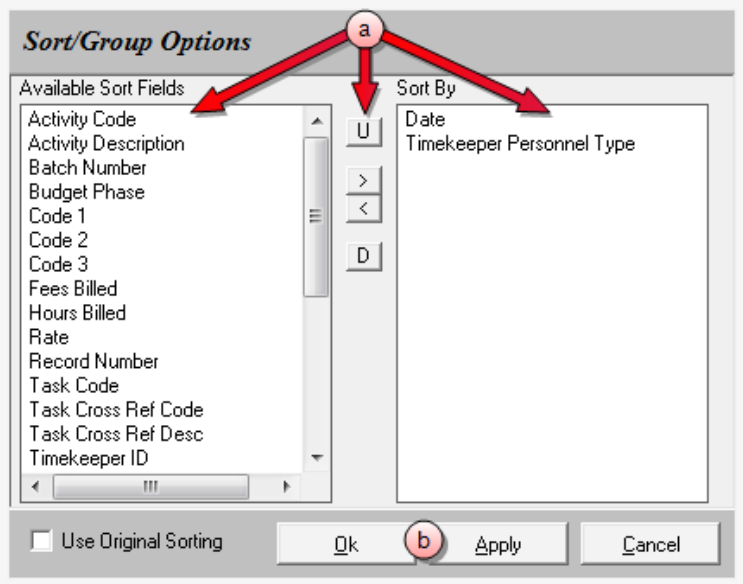

a. Do any of the following, depending on the fields you want to sort by, and the sort order of each field.

   - Too **add a field**, click on the name in the *Available Sort Fields* list, and then click the **right arrow** button to add it to the *Sort By* list.
   - To **remove a field**, click on the name in the *Sort By* list, and then click the **left arrow** button to move it to the *Available Sort Fields* list.
   - To **move a field up in the Sort By list** click on the field to select it, and then click the **U** button.
   - To **move a field down in the Sort By list** iclick on the field to select it, and then click the **D** button.
   - To **use the original sorting selections** click on the **Use Original Sorting** check box to select it. All selections are disabled, meaning they cannot be selected, and only the original sort by fields are used in the sort.

b. Click **Apply** to apply your changes, or **OK** to apply them and close the window.

Add Fee Item

This option opens a blank fee detail window. You can create a new fee entry to add to the bill by filling out the form and saving it. The client and matter default to the current matter, but on a consolidated bill, the matter may be changed to any matter included in the prebill.

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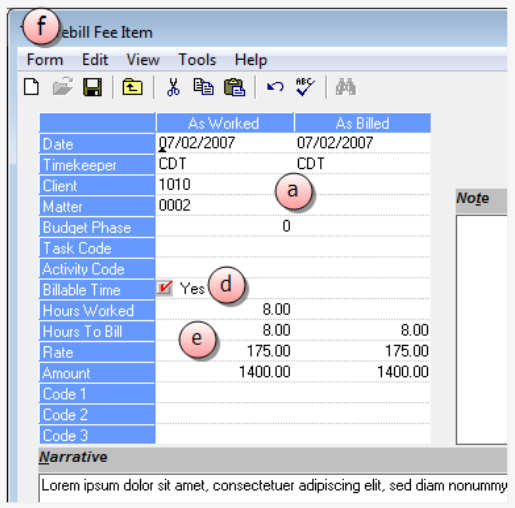

You can choose to edit **As Worked** or **As Billed**, depending on your rights.

a. Click on an item to highlight it.

b. Type in the new value.

c. Repeat steps **a and b** for each detail item you want to change.

d. Optionally, click on the **Billable Time** check box (to select it) , if you want to add a breakdown by hours.

e. Optionally, enter the appropriate breakdown information for the type of entry you are editing (time or expense). This is only necessary if you have selected (checked) the check box in **step d** above.

f. Select **Form** > **Save** to save your changes, when are you finished with all detail item changes.

Add Expense Item

This option opens a blank expense detail window. You can create a new expense entry to add to the bill by filling out the form and saving it. The client and matter default to the current matter, but on a consolidated bill, the matter may be changed to any matter included in the prebill.

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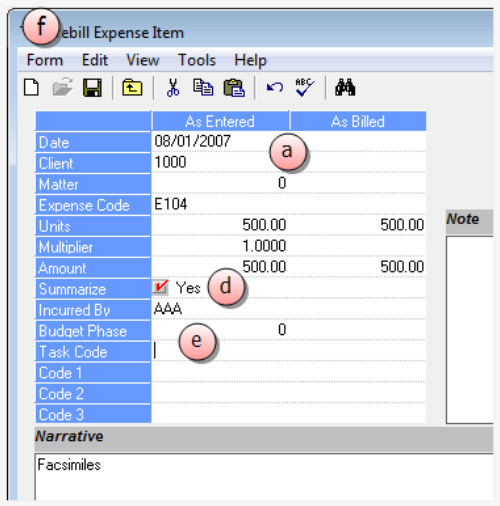

You can choose to edit **As Entered**or **As Billed**, depending on your rights.

a. Click on an item to highlight it.

b. Type in the new value.

c. Repeat steps **a and b** for each detail item you want to change.

d. Click on the **Summarize** check box (to select it), if you want to add a summary breakdown by budget code.

e. Optionally, enter the appropriate breakdown information for theentry you are editing. This is only necessary if you have selected (checked) the check box in **step d** above.

f. Select **Form** > **Save** to save your changes, when are you finished with all detail item changes.

8. Optionally, select **Tools** > **Prepaid / Trust Allocations** to access features to allocate Prepaid funds and Trust funds.

   Prepaid funds, if available, are automatically applied when prebills are selected. Trust funds should be applied manually during the prebill edit process.

   The funds may be applied (or removed) in each of the following manners:

   - If the Prepaid and Trust fields are designed in the bill format, click in the field and type the amount to apply.
   - If the Prepaid and Trust fields are not designed in the bill format:

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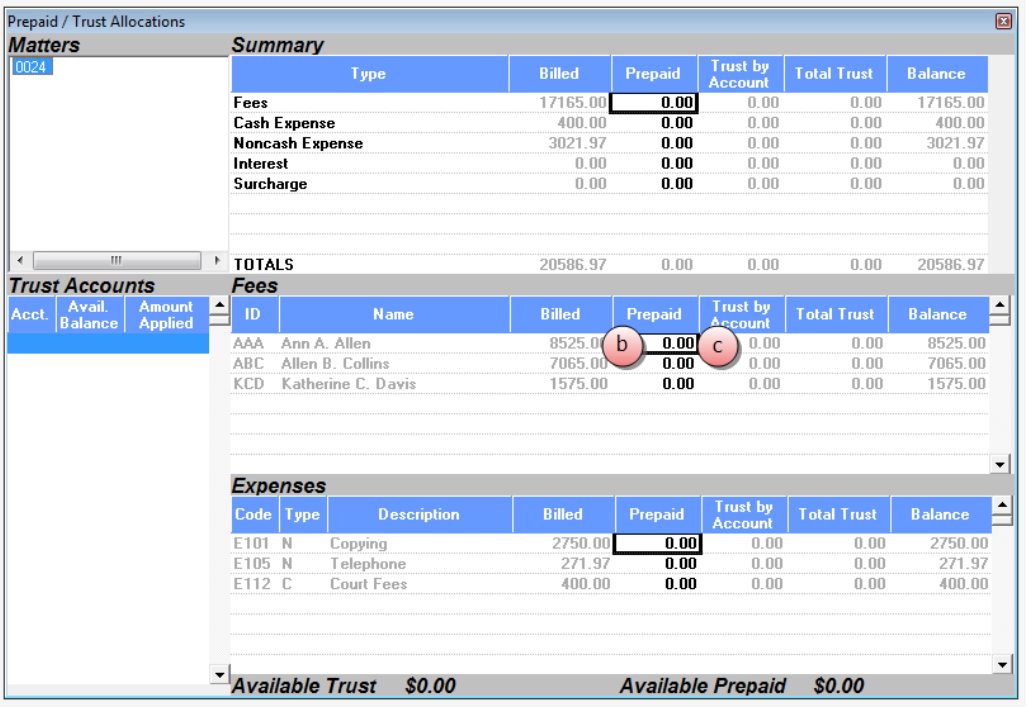
a. Select **Tools** > **Prepaid/Trust Allocation** from the Prebill edit window to open the detailed allocation window.



In this window you can specifically allocate funds to particular bill items, such as cash expenses, noncash expenses, fees, etc. You can also allocate to specific Timekeepers or Expense Codes.

b. Double-click on the **Prepaid** or **Trust by Account** cell in the row that corresponds to the fees or expenses you need to allocate.

> **NOTE:** You cannot allocation more than the prepaid or trust that is available.

c. Type the amount you want to allocate.

This applies the funds according to the default allocations in Setup and Manage. The system warns you if the amount applied exceeds the funds available.

d. Repeats steps **b** and **c** for each allocation you need to make.

e. When finished, click the Window's Close button (x in the right top corner) to close the window.

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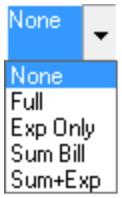
9. (Optional) Click on the **Action Code** column of a prebill in the Edit List and select the action code you want to use.

   The action codes determine the type of detail that should be generated for the bill. Action codes may be assigned in edit prebill – but they may also be pre-determined at the matter level by using Quick Action codes.



   Action code definitions

   - **None** - No action yet selected.
   - **Full** - (Full Detail) Print a bill in the fullest detail possible based on reporting fields available through the specific prebill design.
   - **Exp Only** - (Expense Only) Only bill expenses.
   - **Sum Bill** - (Summary Bill) Bill all items, but suppress the detail of those items, and allow me to enter summary text to replace the suppressed detail.
   - **Sum + Exp** - (Summary + Expense) Allow me to use summary text as a replacement for fee detail, but show the detail of expenses billed.

10. Select **Form** > **Print Preview** to preview a Printed Prebill or to preview the final bill as it will be printed.

    > **NOTE:** The system requires that you save any changes to the prebill before it allows you to go to print preview.

    The Prebill can be reprinted or the final bill can be printed from this screen as well.

Change the order of fee and expense items in a prebill

Juris lets you use a drag-and-drop feature to change the order of (sort) fee and expense items, when editing a prebill.

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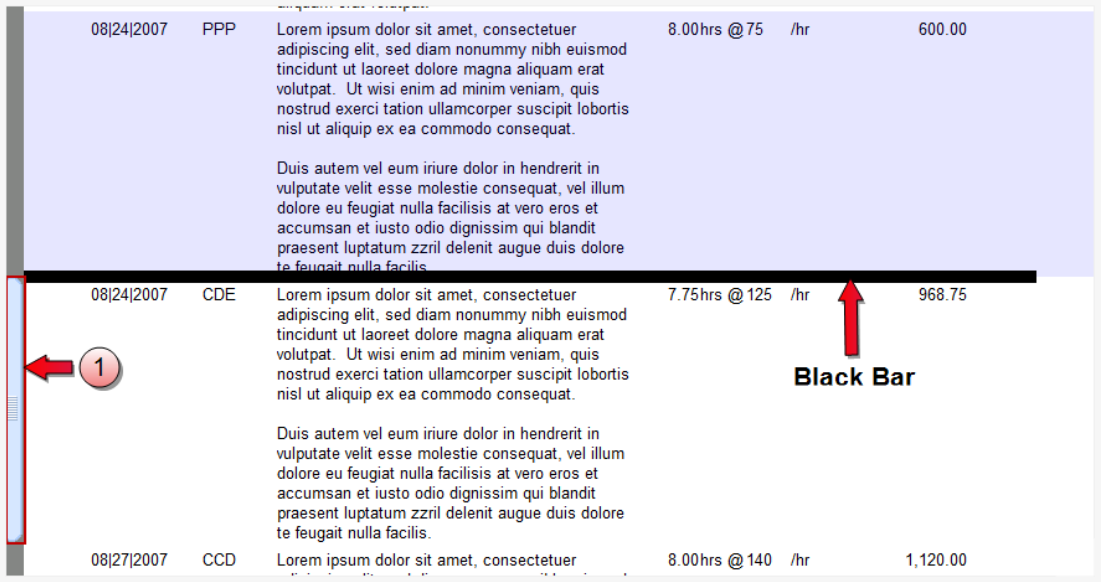
Warning: The drag-and-drop feature should only be used in' Edit Prebills' when the Prebill and the Final Bill use a bill format with the same grouping and sorting criteria. If the Prebill uses a different format than the final bill, then when the final bill is printed, drag-and drop sorting may be lost as the items are sorted based on the options of the final bill format.

To use the drag and drop feature:

1. Highlight a fee or expense item by hovering in the margin to the left of the entry.
2. Click and hold down your mouse button while dragging the item to the desired location.

   The system shows a black bar to illustrate where the entry will be placed.



3. Once the entry is in the correct location, release the mouse button to drop it there.

   When the mouse button is released, the entry drops into its new location.

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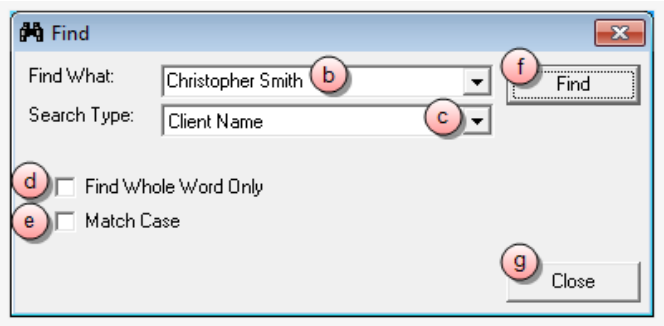
Use Find to search for prebill information

The Find feature can be used to search for specific information in the prebill edit screen, including any data fields on the bill design. Please note that text fields on the bill design are ignored when using Find.

To use Find:



a. Select **Edit** > **Find...** from the Billing\Edit Prebills\Prebill # [number of prebill you have selected] window.

b. In the **Find What** box, type the text you want to search for.

c. Click on the **Search Type** box arrow, and select the type of information the text applies to.

d. Click on the **Find Whole Word Only** check box to select it, if you want to specify that the results match the whole term you have entered.

e. Click on the **Match Case** check box to select it, if you want specify that the results match the capitalization that you have entered.

f. Click **Find** to begin the search process.

   The results are displayed in the Billing\Edit Prebills window list.

g. Click **Close** when finished.

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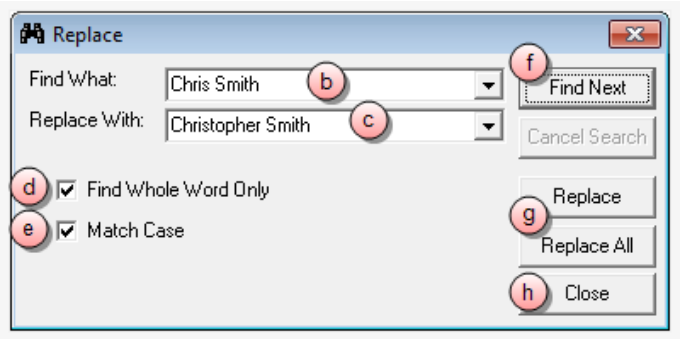
Use Replace to search and replace information in a prebill

The replace feature can be used to search for, and replace, specific information in the prebill edit screen, including any data fields on the bill design. Please note that text fields on the bill design are ignored when using Replace.

To use Replace:



a. Select **Edit** > **Replace...** from the Billing\Edit Prebills\Prebill # [number of prebill you have selected] window.

b. In the **Find What** box, type the text you want to search for.

c. In the **Replace With** box, type the replacement text.

d. Click on the **Find Whole Word Only** check box to select it, if you want to specify that the results match the whole term you have entered.

e. Click on the **Match Case** check box to select it, if you want specify that the results match the capitalization that you have entered.

f. Click **Find Next** to find the first instance of the text you want to replace.

g. Click **Replace** to replace the first instance,

   OR

   Click **Replace All** to replace all found instances of the text.

h. Click **Close** when finished.

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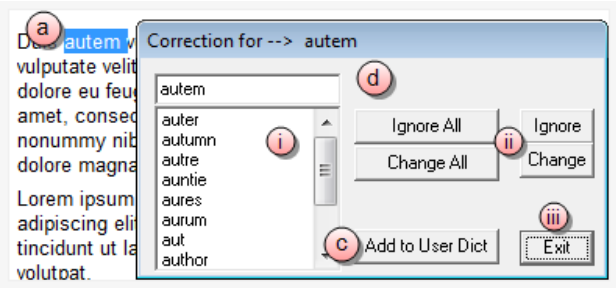
Spell check a prebill

The spell check feature can be used to verify the spelling of any word in the prebill edit window, or to add a word to your dictionary. The spell checker checks for all instances of the word in any of the data fields and on the bill design. Text fields on the bill design are ignored.

To use Spell Check:



a. Double-click on the word you want to spell check to select it.

b. Select **Edit** > **Spell Check...** from the Billing\Edit Prebills\Prebill # [number of prebill you have selected] menu.

   The word you selected is automatically displayed in the Correction for window (as shown above).

c. Optionally, click the **Add to User Dict** button, if you want to add the selected word to your dictionary.

d. Optionally, change one or more instances of the word:

   i. Scroll through the list to find the correct spelling for the word, and click on that word to select it.

   ii. Do one of the following:

   Click the **Change** button to change only the first instance of the word to the word you selected in the list.

   Click the **Change All** button to change all instances of the word be found in the prebill to the word you selected in the list.

   Click the **Ignore** button if you want to leave the current instance of the word exactly as it is spelled.

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Click the **Ignore All** button if you want to leave all instances of the word exactly as currently spelled.

iii. Click the **Exit** button when finished.

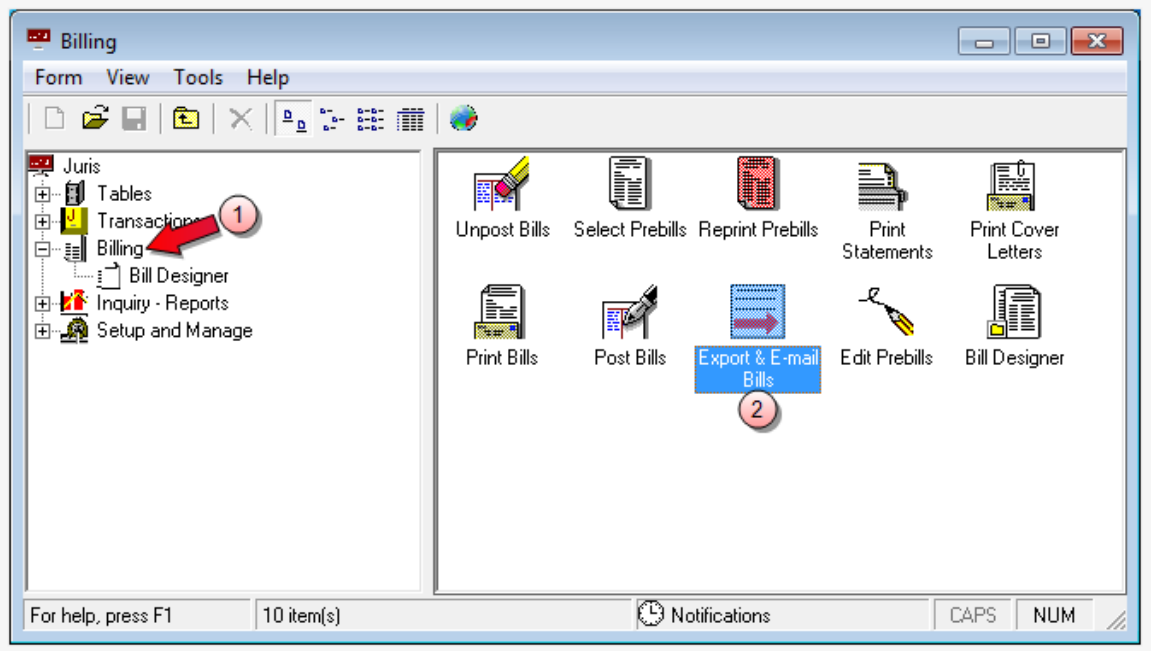
The results are displayed in the prebill.

Export and email bills

> **NOTE:** In order for the email bills feature to work, you must include the client's email address. A client's email address can be entered in the Billing Address\Office window which is accessed via Tables > Client. See Billing Address setup for E-mailing Bills for details.

To export and email bills:

1. Double-click **Billing**.



2. Double-click the **Export & E-mail Bills** icon.

   The Billing\Export & E-mail Bills window opens.

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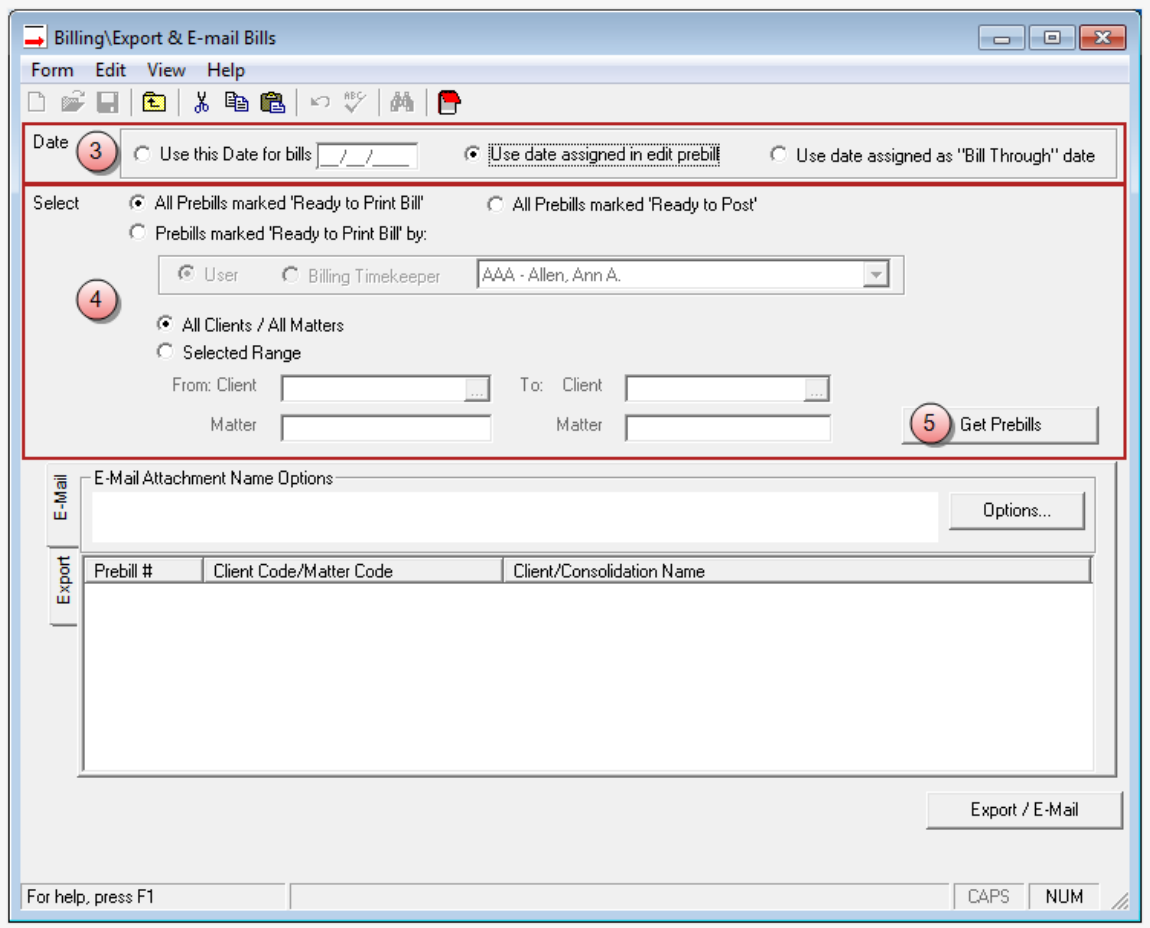

3. Click on the **Date** option you want to use for the billing date. Options are:
   - **Use this Date for bills** - select this option to define a specific date to use.
   - **Use date assigned in edit prebill** - select this option to use the date that was assigned in the prebill.
   - **Use date assigned as "Bill Through" date** - select this option to use the date that was setup as the Bill Through date.

4. Click on the **Select** option that corresponds to the bills you want to export or email:

   All Prebills marked 'Ready to Print Bill'

   This option selects all prebills that have a status of 'Ready to Reprint' in Edit Prebills, or all prebills with a status of 'Ready to Reprint' within a selected client/matter range.

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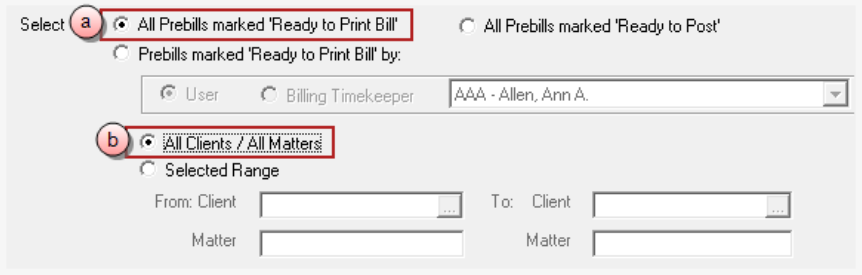
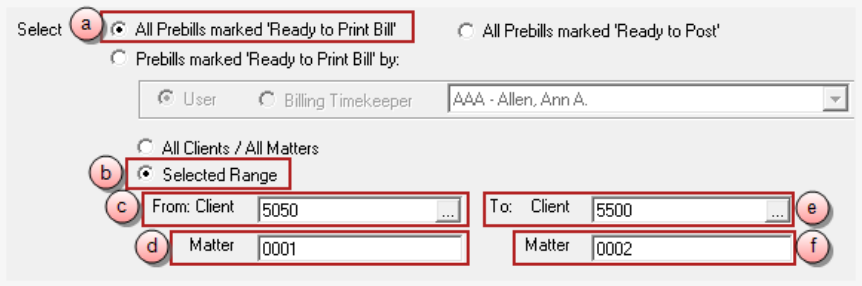
To select all 'Ready to Print Bill' prebills, for all clients and matters:



a. Click on **All Prebills marked 'Ready to Print Bill'** option.

b. Click on the **All Clients / All Matters** option.

To select all 'Ready to Print Bill' prebills, for a range of clients/matters:



a. Click on **All Prebills marked 'Ready to Print Bills'** option.

b. Click on the **Selected Range** option.

c. Click on the **From: Client** box and type the client number to start with, or click the **ellipses** button to search for the client/matter in the Finder window.

d. Click on the (From) **Matter** box and type the matter number to start with, or click the **ellipses** button to search for the client/matter in the Finder window.

e. Click on the **To: Client** box and type the client number to end with, or click the **ellipses** button to search for the client/matter in the Finder window.

f. Click on the (To) **Matter** box and type the matter number to end with, or click the **ellipses** button to search for the client/matter in the Finder window.

All Prebills marked 'Ready to Post'

This option prints all bills that have a status of 'Ready to Post' in Edit Prebills, or all prebills with a status of 'Ready to Post' within a selected client/matter range.

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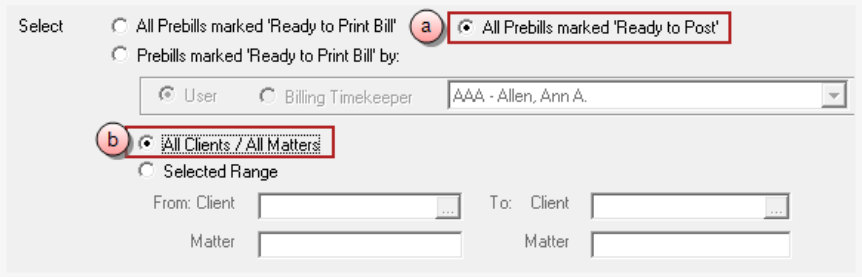
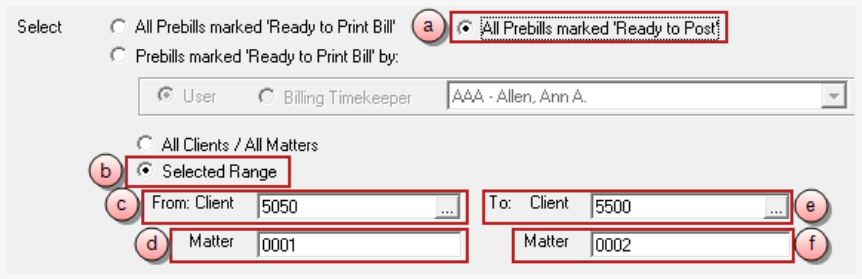
To select all 'Ready to Post' prebills, for all clients and matters:



a. Click on **All Prebills marked 'Ready to Post'** option.

b. Click on the **All Clients / All Matters** option.

To select all 'Ready to Post' prebills, for a range of clients/matters:



a. Click on **All Prebills marked 'Ready to Post'** option.

b. Click on the **Selected Range** option.

c. Click on the **From: Client** box and type the client number to start with, or click the **ellipses** button to search for the client/matter in the Finder window.

d. Click on the (From) **Matter** box and type the matter number to start with, or click the **ellipses** button to search for the client/matter in the Finder window.

e. Click on the **To: Client** box and type the client number to end with, or click the **ellipses** button to search for the client/matter in the Finder window.

f. Click on the (To) **Matter** box and type the matter number to end with, or click the **ellipses** button to search for the client/matter in the Finder window.

Prebills marked 'Ready to Print Bill' by:

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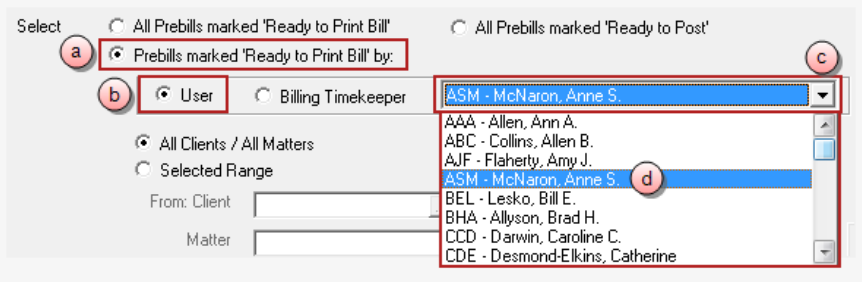
This option lets you select whether to reprint prebills that were marked ‘Ready to Reprint’ by a particular user or to print prebills of a particular Billing Timekeeper that are marked ‘Ready to Reprint.’

To select 'Ready to Print Bill" prebills associated with a particular user:



a. Click on **Prebills marked 'Ready to Print Bill' by:** option.

b. Click on the **User** option.

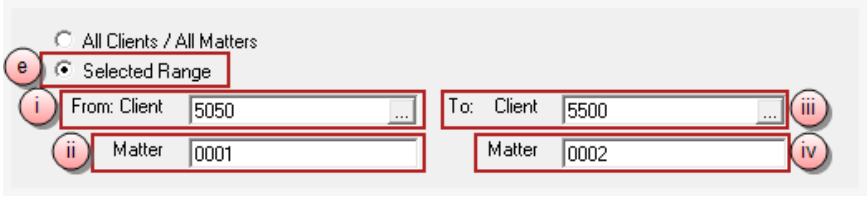
c. Click on the arrow to open a list of users.

d. Scroll through the list and click on the user you want to select them.

e. Do one of the following:

- Click on the **All Clients / All Matters** option to include all clients/matters associated with this user.

- Click on the **Selected Range** option to select a range of clients/matters associated with this user.
  If you chose 'Selected Range,' you also need to:



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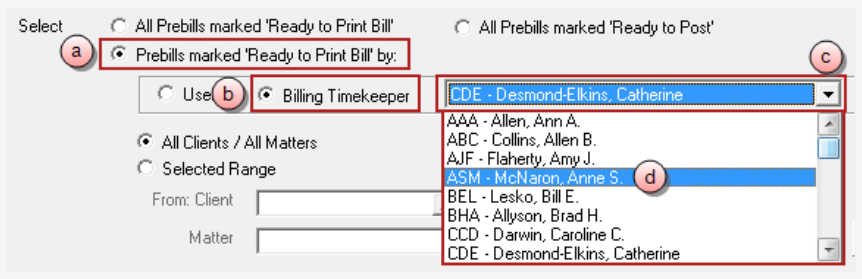
i. Click on the **From: Client** box and type the client number to start with, or click the **ellipses** button to search for the client/matter in the Finder window.

ii. Click on the (From) **Matter** box and type the matter number to start with, or click the **ellipses** button to search for the client/matter in the Finder window.

iii. Click on the **To: Client** box and type the client number to end with, or click the **ellipses** button to search for the client/matter in the Finder window.

iv. Click on the (To) **Matter** box and type the matter number to end with, or click the **ellipses** button to search for the client/matter in the Finder window.

To select 'Ready to Print Bill' prebills associated with a particular billing timekeeper:



a. Click on **Prebills marked 'Ready to Reprint' by:** option.

b. Click on the **Billing Timekeeper** option.

c. Click on the arrow to open a list of billing timekeepers.

d. Scroll through the list and click on the billing timekeeper you want to select them.

e. Do one of the following:

- Click on the **All Clients / All Matters** option to include all clients/matters associated with this billing timekeeper.

  IMAGE

- Click on the **Selected Range** option to select a range of clients/matters associated with this billing timekeeper.
  If you chose 'Selected Range,' you also need to:

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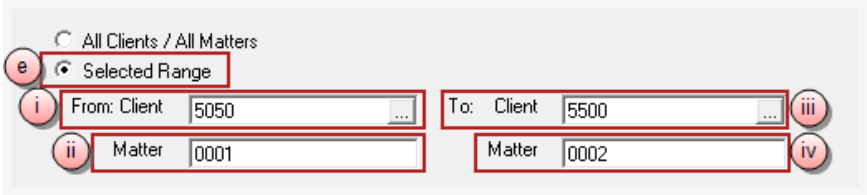


i. Click on the **From: Client** box and type the client number to start with, or click the **ellipses** button to search for the client/matter in the Finder window.

ii. Click on the (From) **Matter** box and type the matter number to start with, or click the **ellipses** button to search for the client/matter in the Finder window.

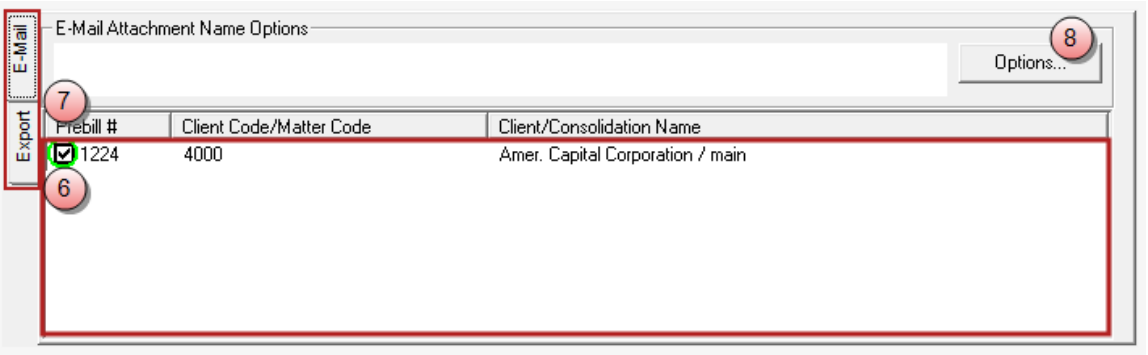
iii. Click on the **To: Client** box and type the client number to end with, or click the **ellipses** button to search for the client/matter in the Finder window.

iv. Click on the (To) **Matter** box and type the matter number to end with, or click the **ellipses** button to search for the client/matter in the Finder window.

5. Click the **Get Prebills** button to have the system pull all bills that are eligible for Export/E-mail.

> **NOTE:** The Matters and Consolidations must have an Export or E-mail format selected or they will not appear on the list. In addition, the email option requires an e-mail address to be saved on the Billing Address tab of the client..

A list of available prebills displays.



6. Optionally, remove the check mark beside any selected bills that should NOT be included in the current Export/E-mail process.

7. Click on the **E-mail** or **Export** tab and select the applicable options (filename, file type, export file path).

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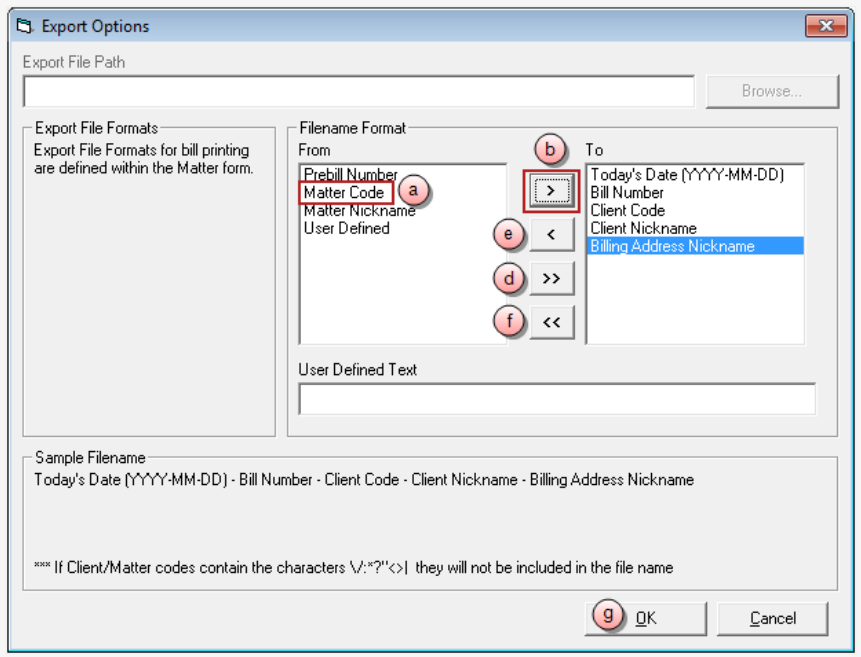
8. Click the **Options** button.

   If you chose the **E-mail** tab...

   The Options button opens the Export Options window and enables you to select the filename formats to use for the email.



Note that the Export File Path feature is disabled. This is because you have chosen the **E-Mail** tab.

In this window, you need to create a filename for email bills. This filename may be defined by moving filename options on the **From** list to the **To** list. You can select multiple items in any order.

a. In the Filename Format **From** list, click on the first value you want displayed in the email filename.

b. Click the **right arrow** to add the value to the **To** list.

c. Repeat steps **a** and **b** for each value you want to add to the email filename format. Values display in the email filename in the order you select them.

d. To add ALL values to the **To** list, click the **double-right arrow** button.

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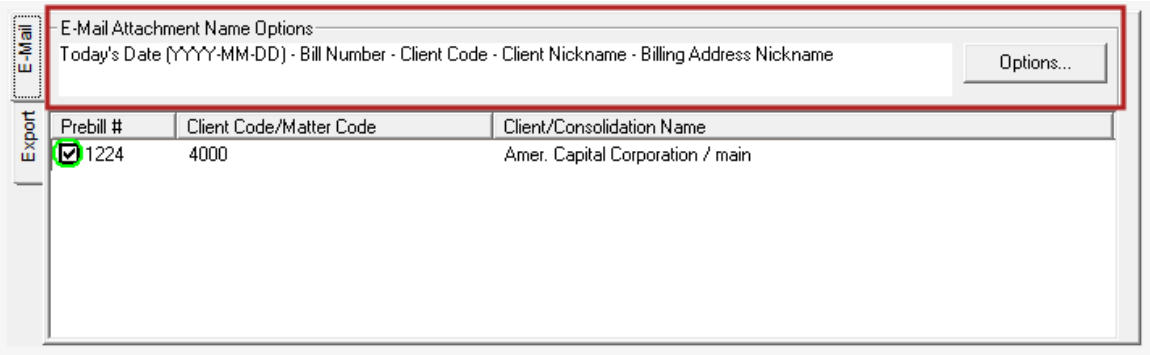
e. To remove a value, click on it in the **To** list and click the **left arrow** button.

f. To remove ALL values from the **To** list, click the **double-left arrow** button.

Click **OK** when finished with all your selections.

Your selections are added to the E-Mail Attachment Name Options area of the E-Mail tab.



NOTE: In addition to having a file type assigned, the Billing Address used must also have an e-mail address assigned in order for E-mail Bills to function. For details on setting up the billing address for emailing bills, see Billing Address setup for E-mailing Bills below.

If you chose the **Export** tab...

the Options button opens the Export Options window and enables you to enter or Browse for a location to place the exported file.

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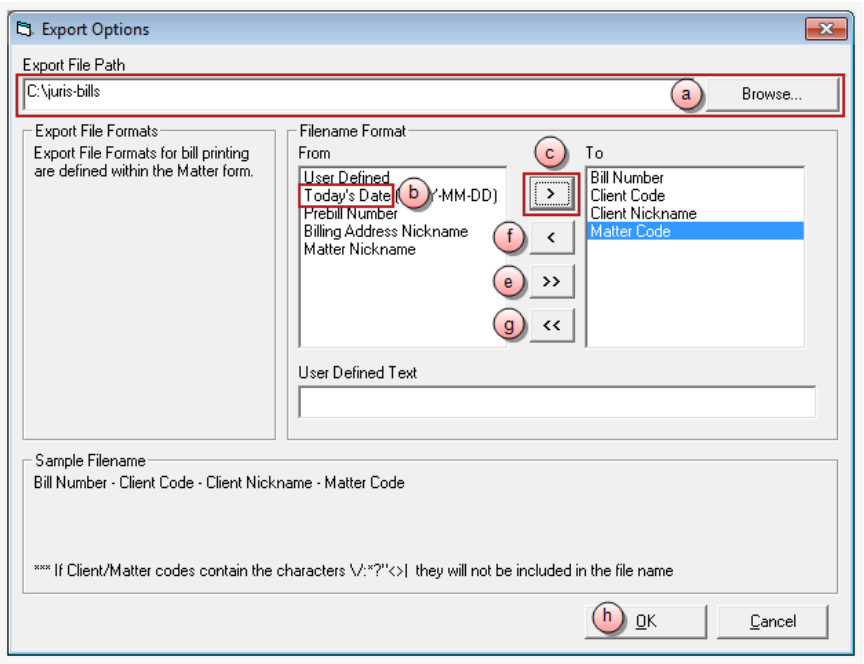

Warning: It is important to include unique information in the export file name. If there is not at least one component in the filename that identifies it uniquely, the system may create more than one invoice with the same filename. If that occurs, the system saves over that file. For example, if you select only the User Defined field to be used for the filename. Subsequently the user exports 50 bills. As each bill is exported, the system attempts to save to the same location with the same filename, essentially overwriting the file each time. The result is that only 1 file, the last file exported, is left after the 50 exports are complete. To assure that this does not happen - always use at least one unique identifier (preferably Bill Number) to assure a unique filename for each export.

a. In the **Export File Path** box, type the file path and folder where you want to save the file,

   OR click the **Browse** button to select the path and folder from the Browse for Folder window.

   This option is only available for Export Bills, and is the location on the hard drive or network drive where the exported bill is to be saved. You must define this location.

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Next you need to create a filename for both the exported bills. This filename may be defined by moving filename options on the **From** list to the **To** list. You can select multiple items in any order.

b. In the Filename Format **From** list, click on the first value you want displayed in the export filename.

c. Click the **right arrow** to add the value to the **To** list.

d. Repeat steps **b** and **c** for each value you want to add to the export filename. Values display in the export filename in the order you select them.

   The word (Bill) is always included at the end of the filename.

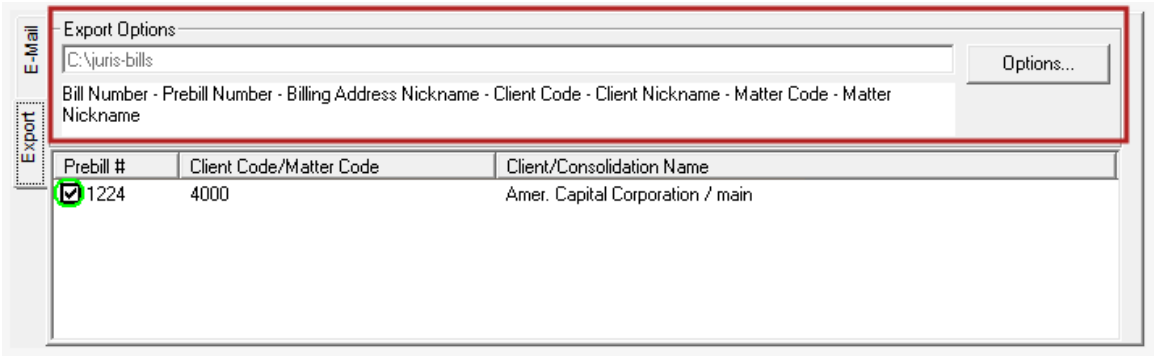
e. To add ALL values to the **To** list, click the **double-right arrow** button.

f. To remove a value, click on it in the **To** list and click the **left arrow** button.

g. To remove ALL values from the **To** list, click the **double-left arrow** button.

h. Click **OK** when finished with all your selections.

   Your selections are added to the Export Options area of the Export tab.



If you chose the **Export OR E-Mail** tab and want to add your own text to the filename ...

the **Options** button opens the Export Options window. Depending on which tab your choose, enter the applicable options as stated above to either E-Mail or Export of the bills. To add specific text to the filename, follow the additional steps below.

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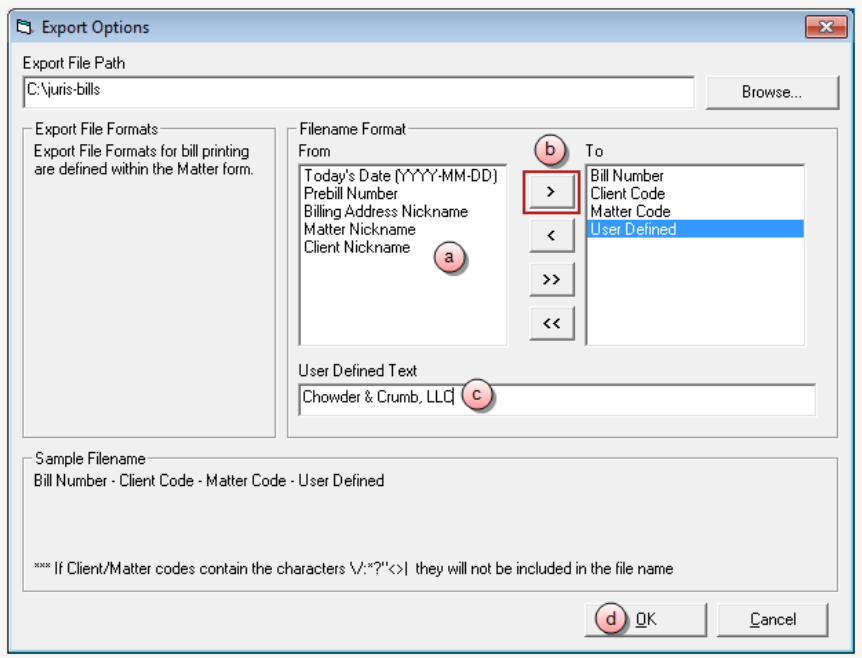

a. In the **From** list, click on the **User Defined** value to select it.

b. Click the **right arrow** to add the value to the **To** list. This value must be added if you want to include your own text in the filename.

c. In the **User Defined Text** box, type the value you want to add to the filename.

   In our example, the filename will be Bill Number, followed by Client Code, followed by Matter Code, followed by the User Defined Text. Given the following information:

   Bill Number 12578
   Client 1000 - American Capital Corporation
   Matter 0800 - HR-Retainer
   [user defined text]
   Bill

   The filename created on the exported or emailed file would be:
   12578 - 1000 - 0800 - Chowder & Crumb, LLC. (Bill).(file extension)

   Where .(file extension) is the filename extension as defined by the file format (XLX, TXT, HTM, RTF, PDF, TIF). The word (Bill) is always included at the end of the filename.

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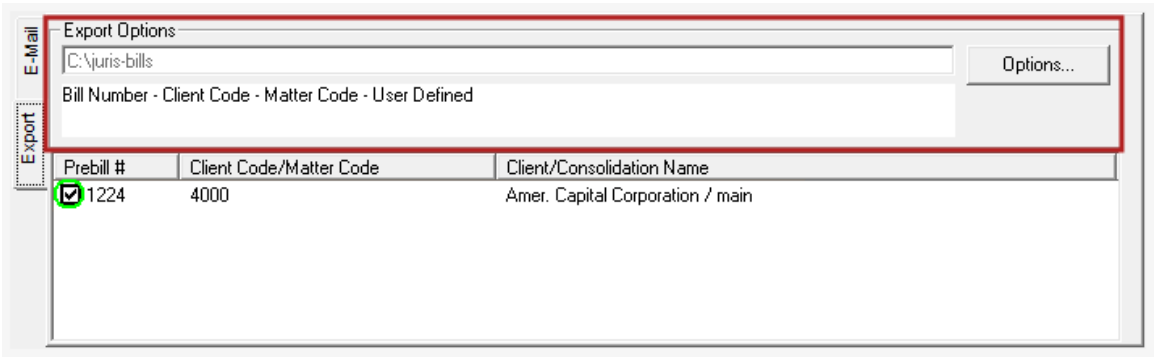
In our example, we chose to "export" to a file.

> **Warning:** It is important to include unique information in the export file name. If there is not at least one component in the filename that identifies it uniquely, the system may create more than one invoice with the same filename. If that occurs, the system saves over that file. For example, if you select only the User Defined field to be used for the filename. Subsequently the user exports 50 bills. As each bill is exported, the system attempts to save to the same location with the same filename, essentially overwriting the file each time. The result is that only 1 file, the last file exported, is left after the 50 exports are complete. To assure that this does not happen - always use at least one unique identifier (preferably Bill Number) to assure a unique filename for each export.

d. Click **OK** when finished with all your selections.

Your selections are added to the Export Options (or E-Mail Attachment Options) area of the Export or E-Mail tab.



9. Click the **Export/Email** button in the Billing\Export & E-Mail Bills window to begin the process.

Matter/Consolidation setup for exporting or email bills

Certain settings must be made on a Matter or Consolidation prior to exporting bills from Juris. On the ‘Send Copy To’ list there is a drop-down list for file types available for bill export. The ‘Send Copy To’ list can be found on the **Address** tab for single matters. If a consolidated bill, the ‘Send Copy To’ list can be found on the Consolidation form for the Client.

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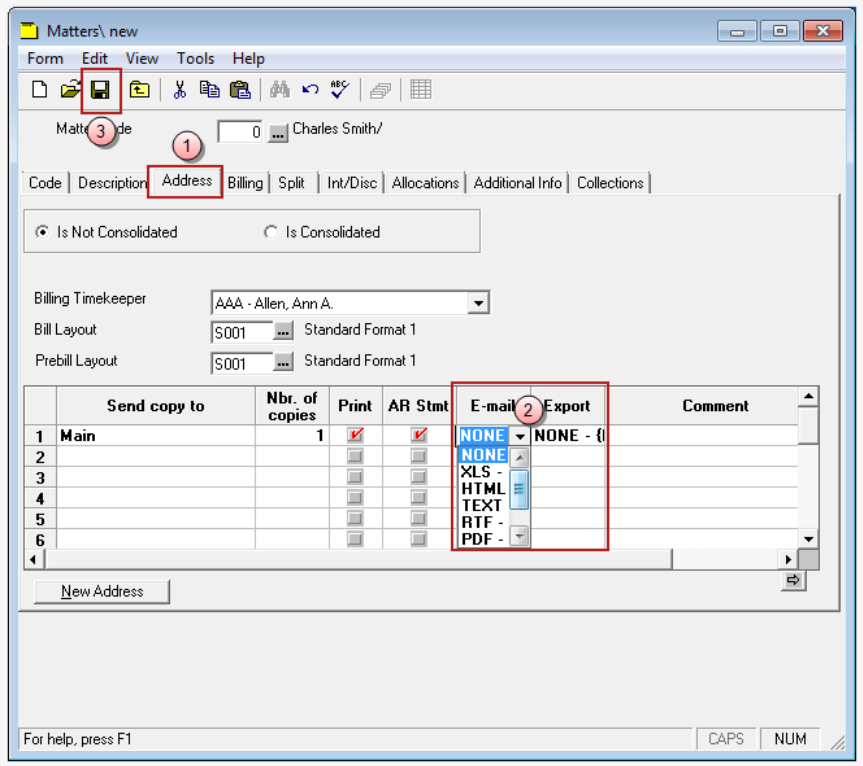
> **NOTE:** A file type for the export file must be selected from the drop-down in order to export bills to a file. Matters with the export option set equal to NONE do not show up in the Export Selection window when the 'Get Prebills' button is clicked on in Export/E-mail Bills.

A file type for the export file must be selected from the drop-down in order to export bills to a file. Matters with the export option set equal to NONE do not show up in the Export Selection window when the Get Prebills button is clicked on in Export/E-mail Bills.

Single Matter

To select a file type on a single matter:



1. Click on the **Address** tab.
2. Click on the **E-mail** and **Export** arrow and select the file type you want to use from the list.
   - If you choose to Export a LEDES 1998B file, click the **LEDES** button that displays after the file type selection, and confirm the **Client Matter ID**, **Law Firm ID**, and **Cross**

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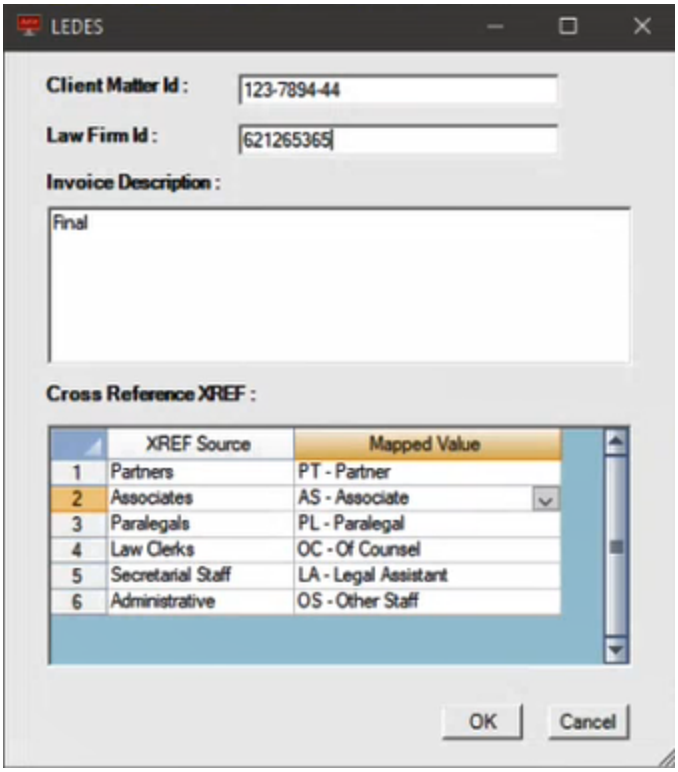
References XREF values have been set.



3. Click the **Save** button to save the file type(s) you have selected.

Consolidation

To select a file type for a consolidation:

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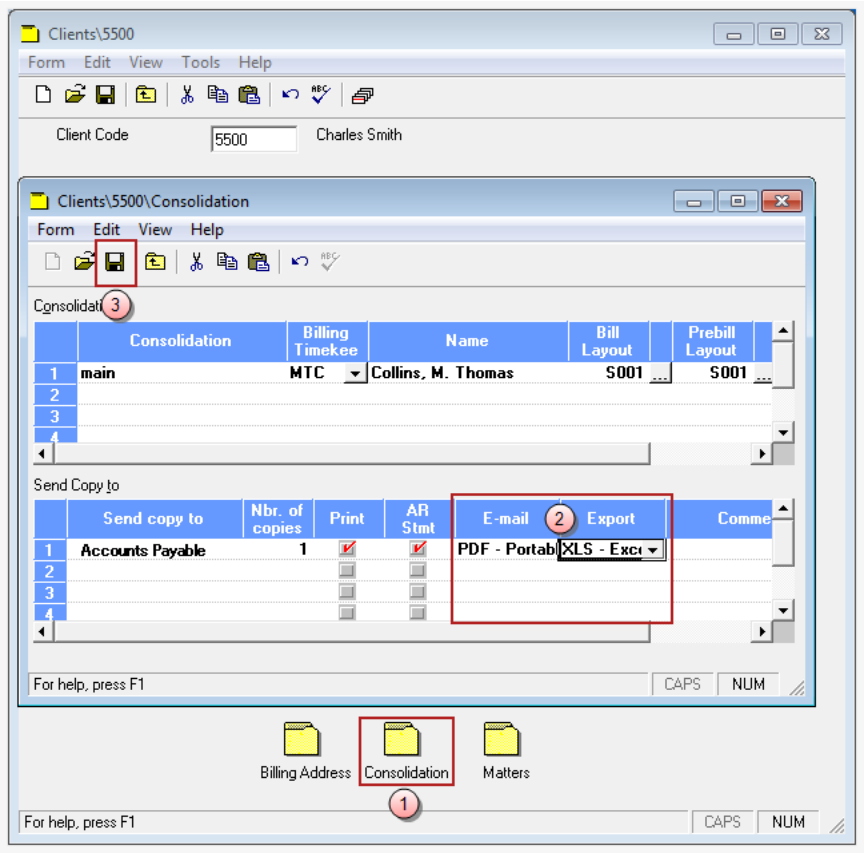

1. Click on the **Consolidation** icon at the bottom of the Clients window to open the Clients\[client number]\Consolidation window.
2. Click on the **E-mail** or **Export** arrow and select the file type you want to use from the list.
3. Click the **Save** button to save the file type(s) you have selected.

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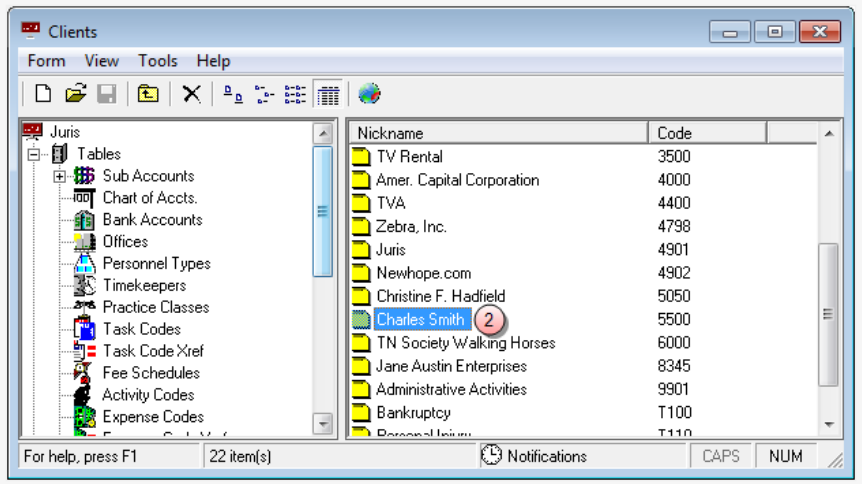
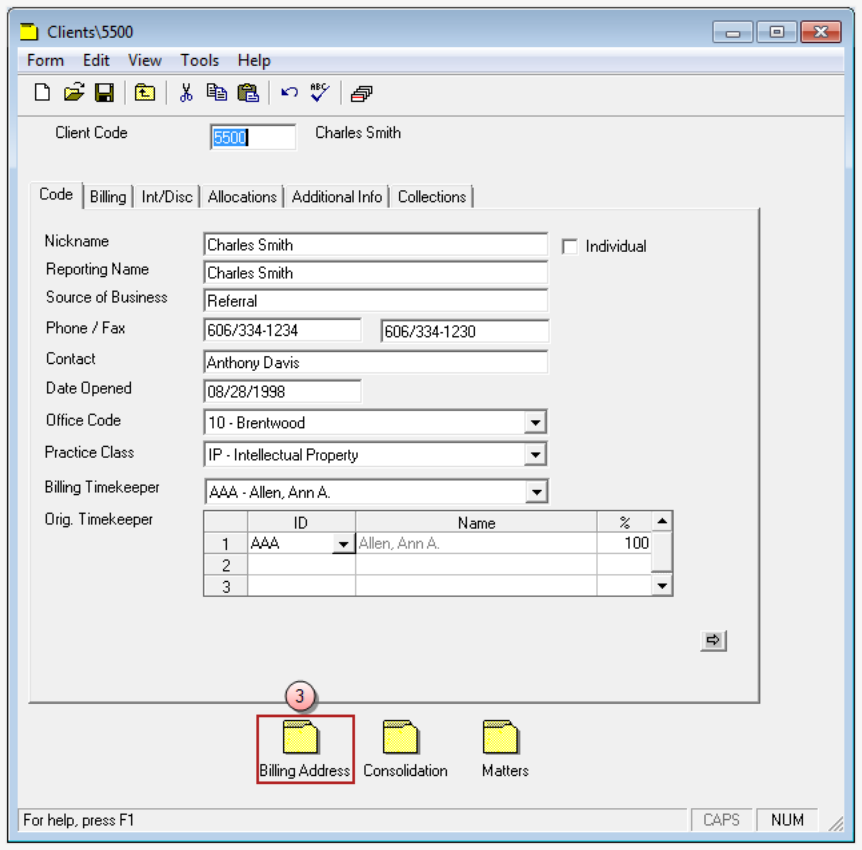
Billing Address setup for E-mailing Bills

1. Select **Tables** > **Client** to open the list of clients on the right.



2. Double-click on the client name to open the Clients\[client code] window.



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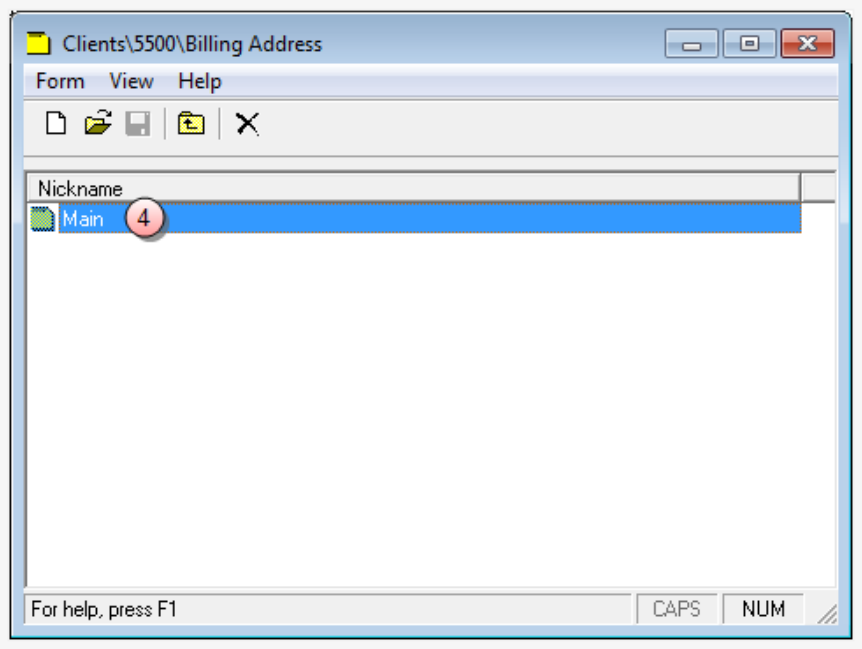
3. Double-click the **Billing Address** icon at the bottom of the window.

   A Billing Address selection window opens.



4. Double-click on the **Nickname** of the billing address you want to setup for email.

   For client's with only one address, the nickname is "Main."

   A Billing Address\'Main' (or which ever nickname you selected) window opens.

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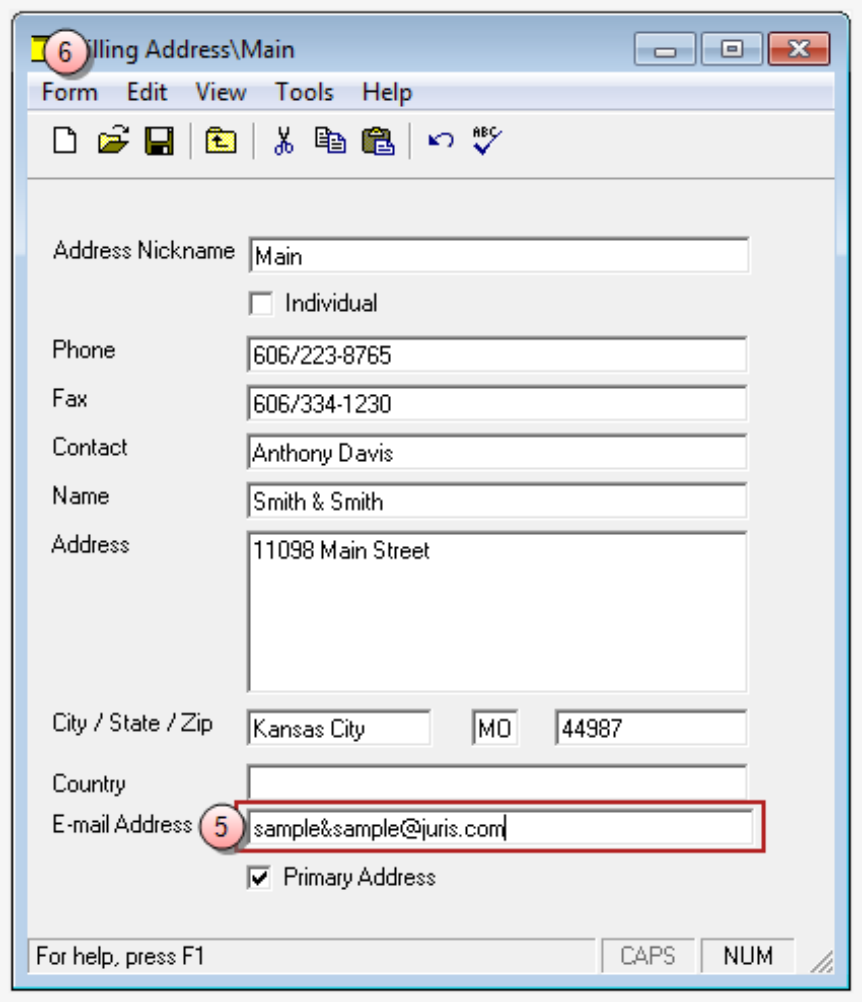

5. In the **E-mail Address** box, type in the email address to which the bill should be emailed.
6. Click **Save** to save the email address.

Print a Bill

To print your bill after all edits/changes have been done:

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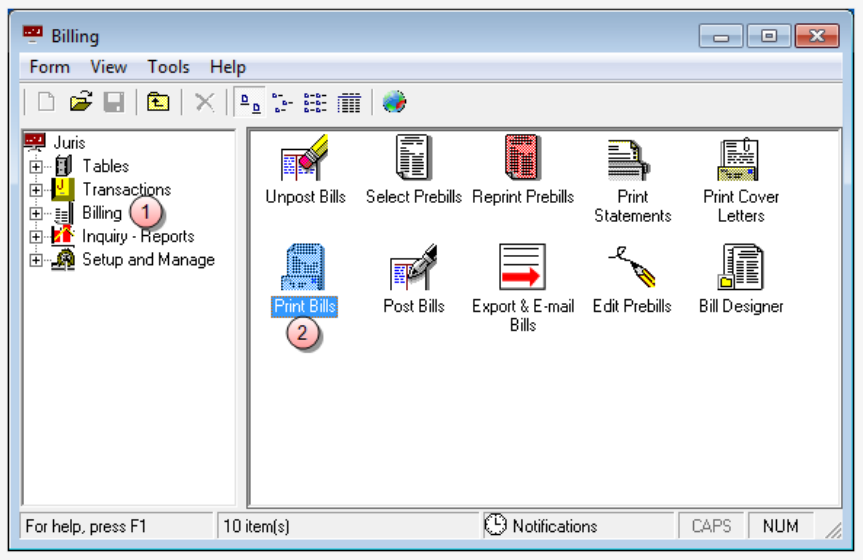
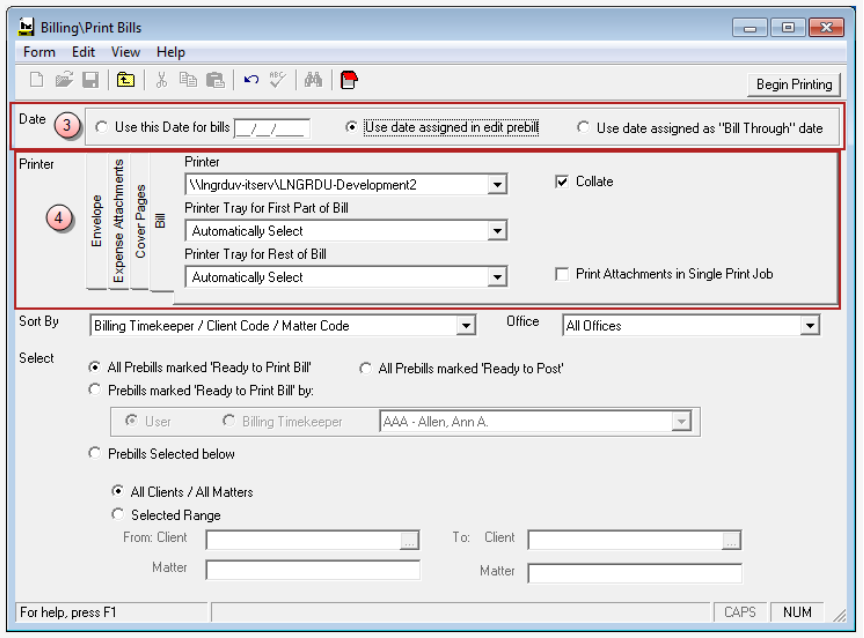
1. Double-click **Billing** to open the billing options in the right-side pane.



2. Double-click the **Print Bills** icon.

   The Billing\Print Bills window opens.



3. Select the Date option you want to use for the billing date.

   Use this Date for bills - select this option to define a specific date to use.

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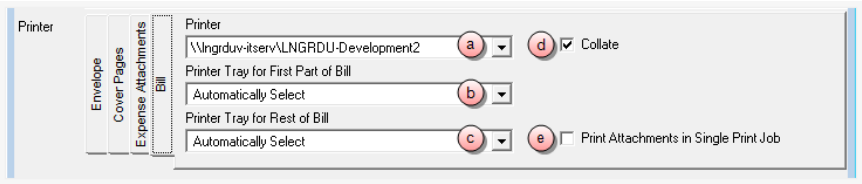
Use date assigned in edit prebill - select this option to use the date that was assigned in the prebill.

Use date assigned as "Bill Through" date - select this option to use the date that was setup as the Bill Through date.

4. Select the appropriate printer options for each component of your bills.

Bill



a. Click the **Printer** arrow and select the printer to print bills to.

b. Click the **Printer Tray for First Part of Bill** arrow and select the printer tray you want to use for the first page of the bill.

c. Click the **Printer Tray for Rest of Bill** arrow and select the printer tray to use for the remaining bill pages.

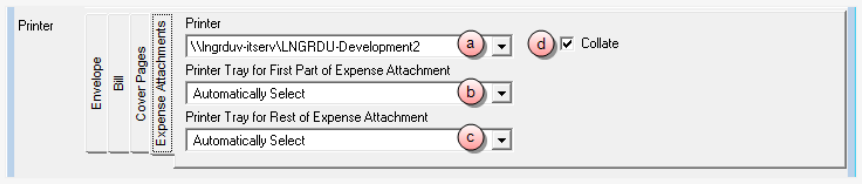
d. Click the **Collate** check box to have the pages automatically collated.

   A check mark indicates that collation is selected.

e. Click the **Print Attachments in Single Print Job** if you want to include all attachments in this one print job.

   A check mark indicates that you want to use this option.

Expense Attachments



a. Click the **Printer** arrow and select the printer to print expense attachments to.

b. Click the **Printer Tray for First Part of Expense Attachment** arrow and select the printer tray you want to use for the first page.

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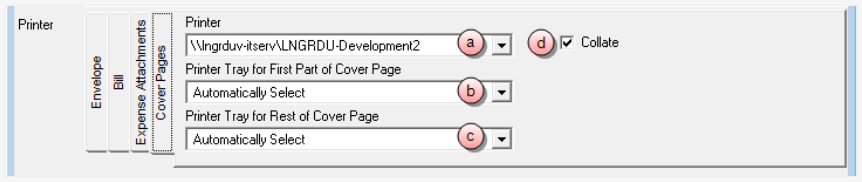
c. Click the **Printer Tray for Rest of Expense Attachment** arrow and select the printer tray to use for the remaining pages.

d. Click the **Collate** check box to have the pages automatically collated.

A check mark indicates that collation is selected.

Cover Pages



a. Click the **Printer** arrow and select the printer to print the cover pages to.

b. Click the **Printer Tray for First Part of Cover Page** arrow and select the printer tray you want to use for the first part.

c. Click the **Printer Tray for Rest of Cover Page** arrow and select the printer tray to use for the remaining parts.

d. Click the **Collate** check box to have the pages automatically collated.

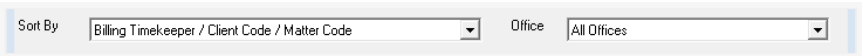
A check mark indicates that collation is selected.

Envelope

a. Click the **Printer** arrow and select the printer to print envelopes to.

b. Click the **Printer Tray** arrow and select the tray to use for the envelopes.

5. Click on the **Sort by** arrow and select the order in which you want the bills sorted.



6. Click the **Office** arrow to select the office for which you want to print bills. This option is only available if you have multiple offices setup.

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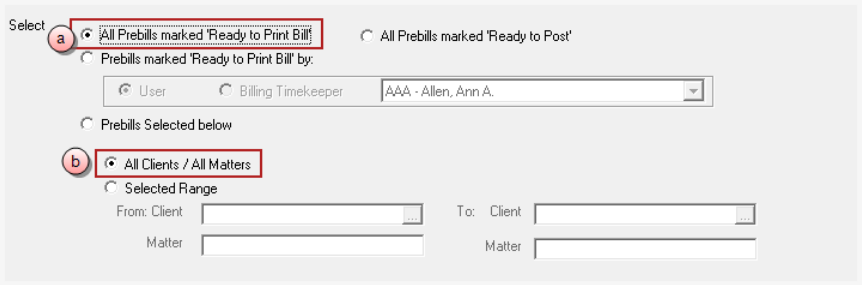
7. Click on the **Select** option that corresponds to the bills you want to print:

   All Prebills marked 'Ready to Print Bill'

   This option prints all bills that have a status of 'Ready to Reprint' in Edit Prebills, or all prebills with a status of 'Ready to Reprint' within a selected client/matter range.

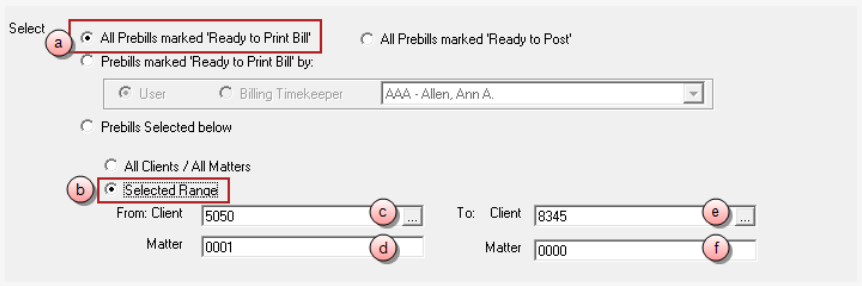
   To print all 'Ready to Print Bill' prebills, for all clients and matters:



   a. Click on **All Prebills marked 'Ready to Print Bill'** option.

   b. Click on the **All Clients / All Matters** option.

   To print all 'Ready to Print Bill' prebills, for a range of clients/matters:



   a. Click on **All Prebills marked 'Ready to Print Bills'** option.

   b. Click on the **Selected Range** option.

   c. Click on the **From: Client** box and type the client number to start with, or click the ellipses button to search for the client/matter in the Finder window.

   d. Click on the (From) **Matter** box and type the matter number to start with, or click the ellipses button to search for the client/matter in the Finder window.

   e. Click on the **To: Client** box and type the client number to end with, or click the ellipses button to search for the client/matter in the Finder window.

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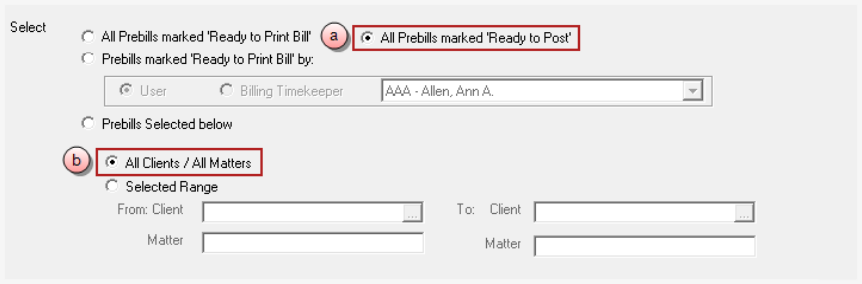
f. Click on the (To) **Matter** box and type the matter number to end with, or click the ellipses button to search for the client/matter in the Finder window.

All Prebills marked 'Ready to Post'

This option prints all bills that have a status of 'Ready to Post' in Edit Prebills, or all prebills with a status of 'Ready to Post' within a selected client/matter range.

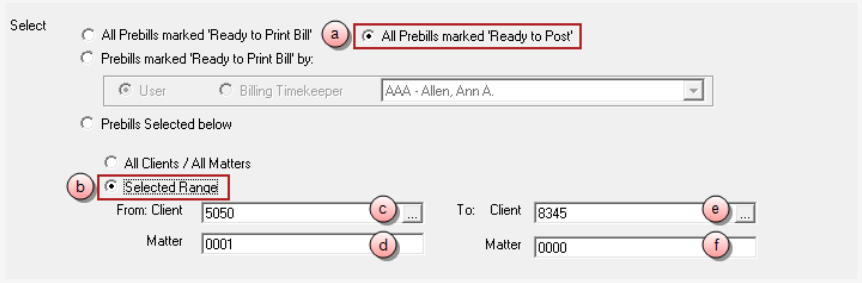
To print all 'Ready to Post' prebills, for all clients and matters:



a. Click on **All Prebills marked 'Ready to Post'** option.

b. Click on the **All Clients / All Matters** option.

To print all 'Ready to Post' prebills, for a range of clients/matters:



a. Click on **All Prebills marked 'Ready to Post'** option.

b. Click on the **Selected Range** option.

c. Click on the **From: Client** box and type the client number to start with, or click the ellipses button to search for the client/matter in the Finder window.

d. Click on the (From) **Matter** box and type the matter number to start with, or click the ellipses button to search for the client/matter in the Finder window.

e. Click on the **To: Client** box and type the client number to end with, or click the ellipses button to search for the client/matter in the Finder window.

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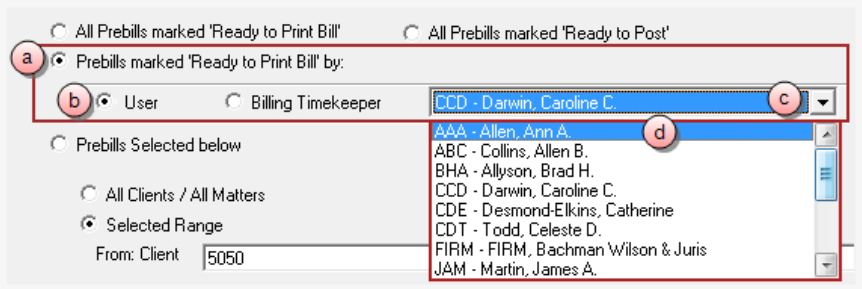
f. Click on the (To) **Matter** box and type the matter number to end with, or click the ellipses button to search for the client/matter in the Finder window.

Prebills marked 'Ready to Print Bill' by:

This option lets you select whether to reprint prebills that were marked ‘Ready to Reprint’ by a particular user or to print prebills of a particular Billing Timekeeper that are marked ‘Ready to Reprint.’

To print 'Ready to Print Bill" prebills associated with a particular user:



a. Click on **Prebills marked 'Ready to Print Bill' by:** option.

b. Click on the **User** option.

c. Click on the arrow to open a list of users.

d. Scroll through the list and click on the user you want to select them.

e. Do one of the following:

- Click on the **All Clients / All Matters** option to include all clients/matters associated with this user.

- Click on the **Selected Range** option to select a range of clients/matters associated with this user.
  If you chose 'Selected Range,' you also need to:

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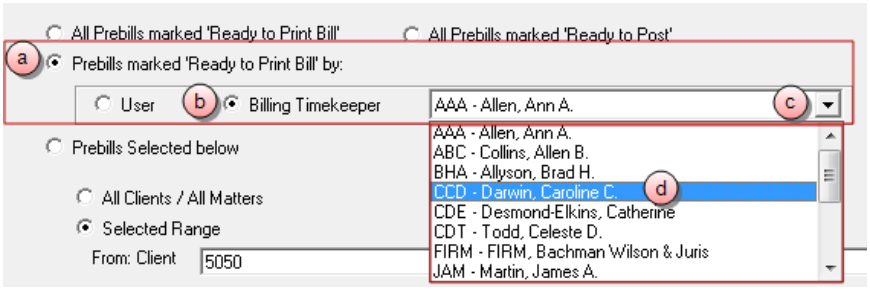
i. Click on the **From: Client** box and type the client number to start with, or click the ellipses button to search for the client/matter in the Finder window.

ii. Click on the (From) **Matter** box and type the matter number to start with, or click the ellipses button to search for the client/matter in the Finder window.

iii. Click on the **To: Client** box and type the client number to end with, or click the ellipses button to search for the client/matter in the Finder window.

iv. Click on the (To) **Matter** box and type the matter number to end with, or click the ellipses button to search for the client/matter in the Finder window.

To print 'Ready to Print Bill' prebills associated with a particular billing timekeeper:



a. Click on **Prebills marked 'Ready to Reprint' by:** option.

b. Click on the **Billing Timekeeper** option.

c. Click on the arrow to open a list of billing timekeepers.

d. Scroll through the list and click on the billing timekeeper you want to select them.

e. Do one of the following:

- Click on the **All Clients / All Matters** option to include all clients/matters associated with this billing timekeeper.

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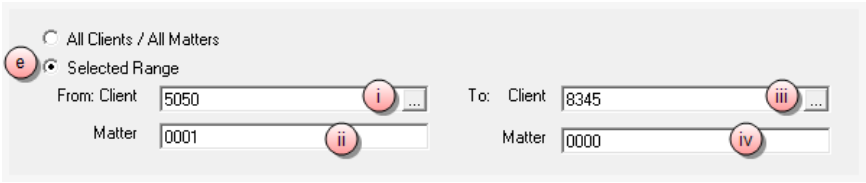
- Click on the **Selected Range** option to select a range of clients/matters associated with this billing timekeeper.
  If you chose 'Selected Range,' you also need to:



  i. Click on the **From: Client** box and type the client number to start with, or click the ellipses button to search for the client/matter in the Finder window.

  ii. Click on the (From) **Matter** box and type the matter number to start with, or click the ellipses button to search for the client/matter in the Finder window.

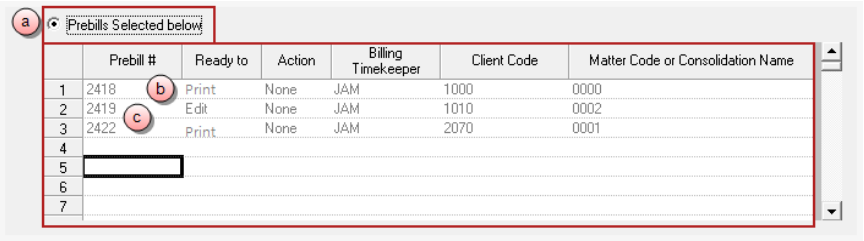
  iii. Click on the **To: Client** box and type the client number to end with, or click the ellipses button to search for the client/matter in the Finder window.

  iv. Click on the (To) **Matter** box and type the matter number to end with, or click the ellipses button to search for the client/matter in the Finder window.

Prebills Selected below

This options replaces the Client/Matter Range option with a spreadsheet that can be used to enter particular prebills to be reprinted by prebill number.

To reprint specific prebills selected by prebill number:



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a. Click on **Prebills Selected below** option.

b. Click on the first **Prebill #** cell and type the number of the prebill you want to reprint.

   The result of the cells are automatically populated with the information from the prebill number you entered.

c. Repeat **step b** for each prebill you want to reprint.

> **NOTE:** The system lets you enter a prebill number for a prebill that does not have a status of ‘Ready to Print’ – but the system warns you that the status is not ‘Ready to Print’ and asks if you are sure you want to reprint that prebill before beginning the reprint process.

8. Click the **Print Bills** button to begin the printing process based on the criteria selected.

> **TIP:** After you have printed or exported bills and while you still have the 'Print Bill' window open, you can select to Re-print or Re-export the bills if you experienced a problem with the process. To re-print or re-export the bills, please see the following section.

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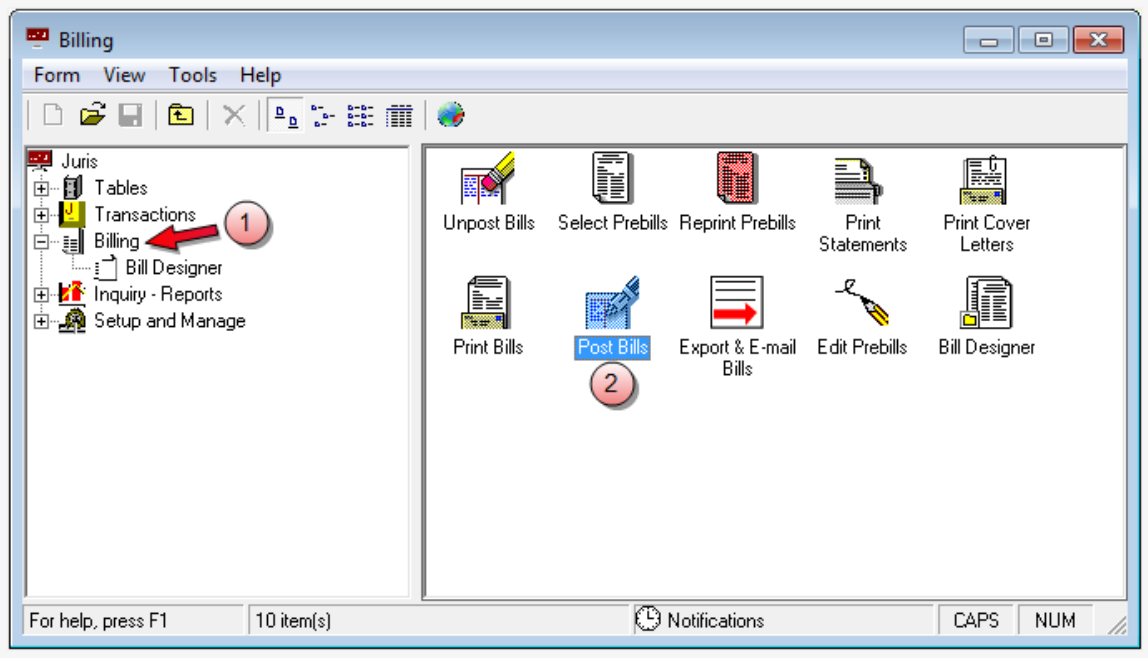
Post a Bill

Warning: Do not interrupt the Posting Process. If this process is interrupted, it could cause corruption of the data requiring that the data be restored from backup. Do not use other applications or processes on your PC while Posting Bills.

To post Bills:

1. Double-click **Billing**.



2. Double-click the **Post Bills** icon.

   The Billing\Post Bills window opens.

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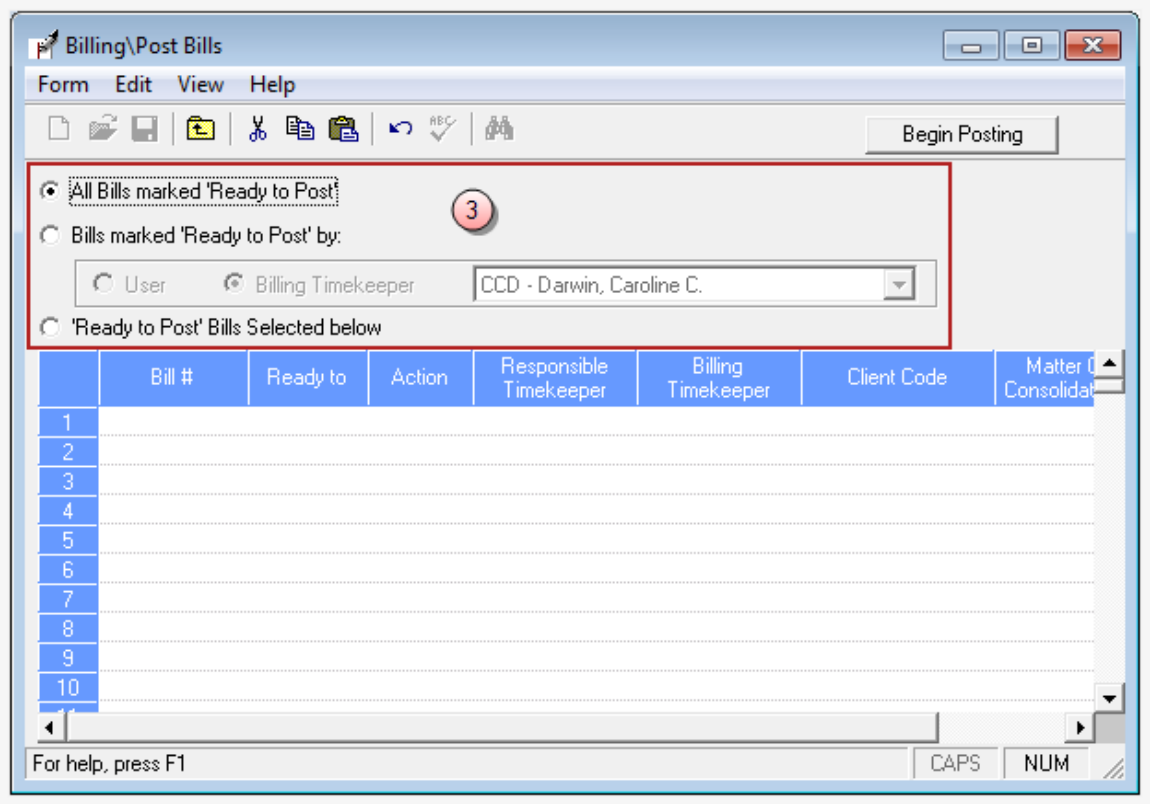

3. Select the options that corresponds to the bills you want to post.

   - **All Bills marked 'Ready to Post'** - Post all bills that have a status of 'Ready to Post' in Edit Prebills.

     To use this option:

     Click on the **All Bills marked 'Ready to Post'** option.

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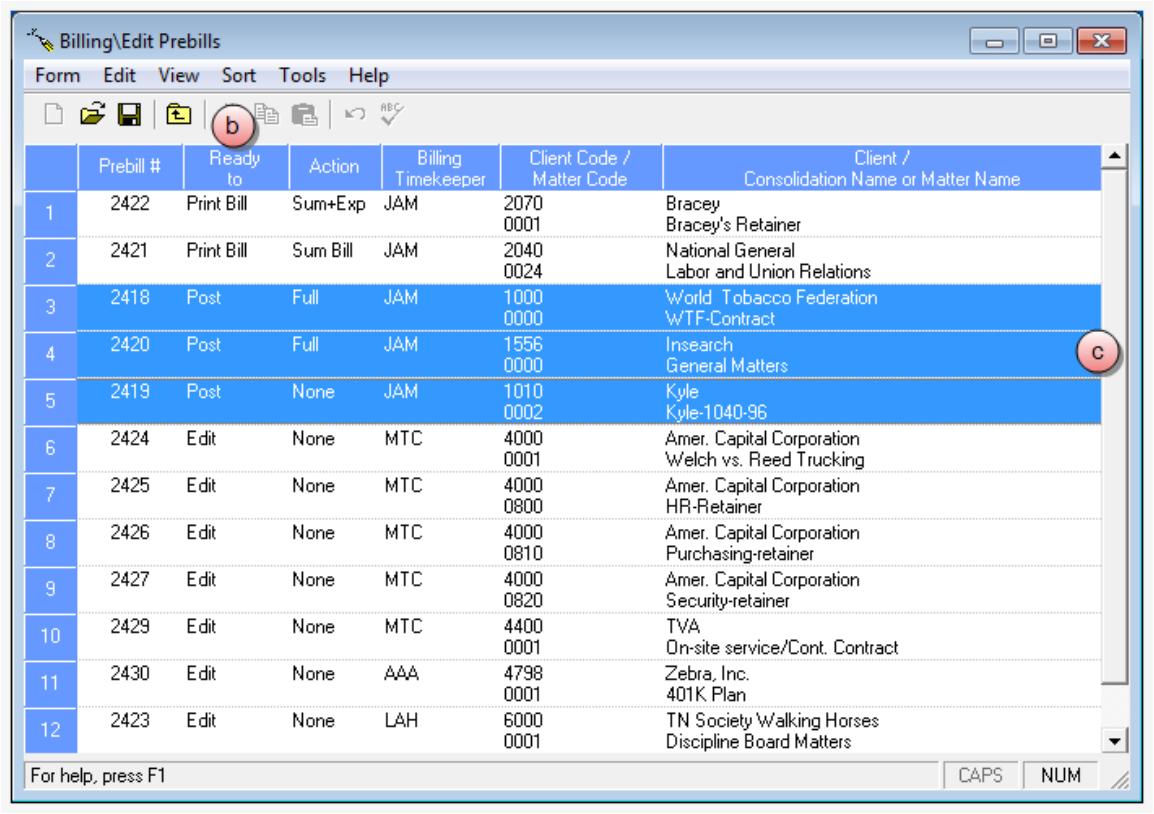
To see which bills have a 'Ready to Post' status:

a. Open the **Edit Prebills** window.



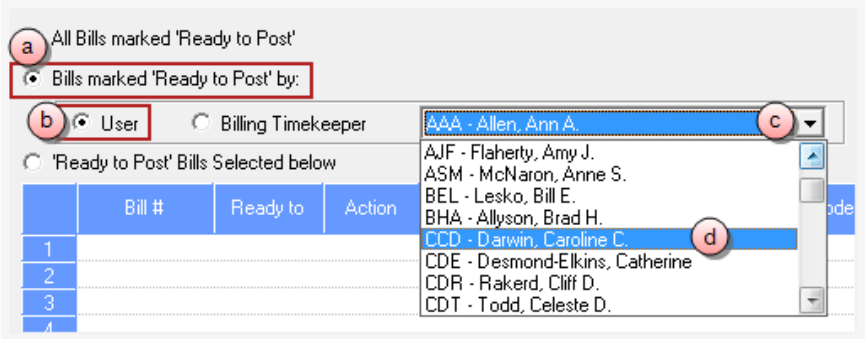
	Prebill #	Ready to	Action	Billing Timekeeper	Client Code / Matter Code	Client / Consolidation Name or Matter Name
1	2422	Print Bill	Sum+Exp	JAM	2070 0001	Bracey Bracey's Retainer
2	2421	Print Bill	Sum Bill	JAM	2040 0024	National General Labor and Union Relations
3	2418	Post	Full	JAM	1000 0000	World Tobacco Federation WTF-Contract
4	2420	Post	Full	JAM	1556 0000	Insearch General Matters
5	2419	Post	None	JAM	1010 0002	Kyle Kyle-1040-96
6	2424	Edit	None	MTC	4000 0001	Amer. Capital Corporation Welch vs. Reed Trucking
7	2425	Edit	None	MTC	4000 0800	Amer. Capital Corporation HR-Retainer
8	2426	Edit	None	MTC	4000 0810	Amer. Capital Corporation Purchasing-retainer
9	2427	Edit	None	MTC	4000 0820	Amer. Capital Corporation Security-retainer
10	2429	Edit	None	MTC	4400 0001	TVA On-site service/Cont. Contract
11	2430	Edit	None	AAA	4798 0001	Zebra, Inc. 401K Plan
12	2423	Edit	None	LAH	6000 0001	TN Society Walking Horses Discipline Board Matters

b. Sort by the **Ready To** column.

c. Scroll down to review all items with a ‘Ready To’ status of 'POST'.

- **All Bills marked ‘Ready to Post’ by: [User]** - Post all bills that have the status of ‘Ready to Post’ when the user matches the one selected.

To use this option:



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a. Click on **Bills marked 'Ready to Post' by:** option.

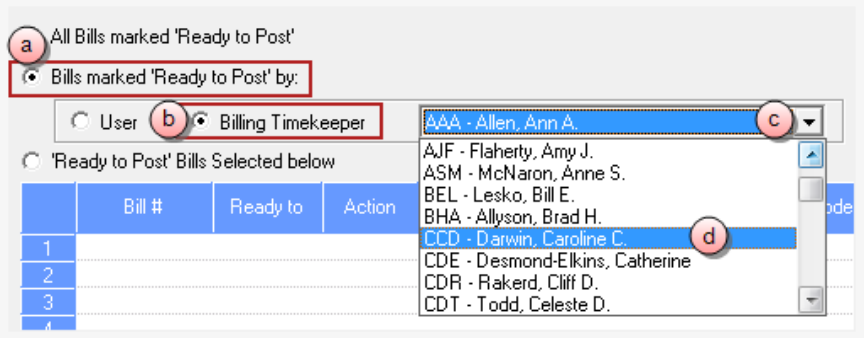
b. Click on the **User** option.

c. Click on the arrow to open a list of users.

d. Scroll through the list and click on the user you want to select them.

- **All Bills marked 'Ready to Post' by: [Billing Timekeeper]** - Post all bills that have the status of 'Ready to Post' when the billing timekeeper matches the one selected.

To use this option:



a. Click the **Bills marked 'Ready to Post' by:** option.

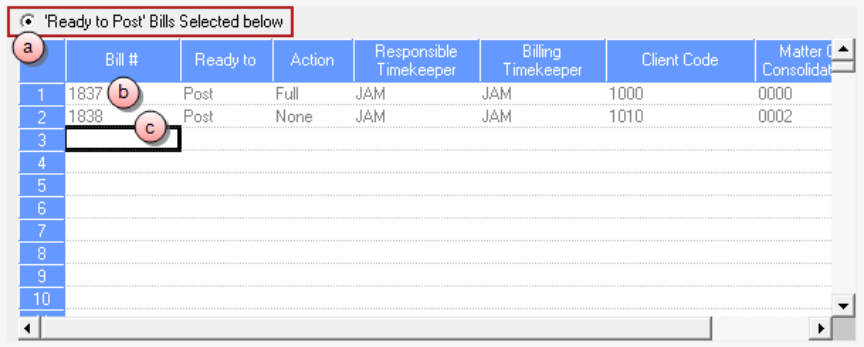
b. Click on the **Billing Timekeeper** option.

c. Click on the arrow to open a list of billing timekeepers.

d. Scroll through the list and click on the user you want to select them.

- **'Ready to Post' Bills Selected below** - Post specific bills by entering or selecting bill numbers.

To use this option:



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a. Click the **Bills marked 'Ready to Post' by:** option.

b. Click in the first **Bill #** cell and type the number of the bill you want to post, or use the Find button to search for and select bills.

c. Repeat step a for each bill you want to add, or use the Find button to quickly search for and select multiple bills.

4. Click the **Begin Posting** button to begin the posting process after the criteria for posting has been selected.

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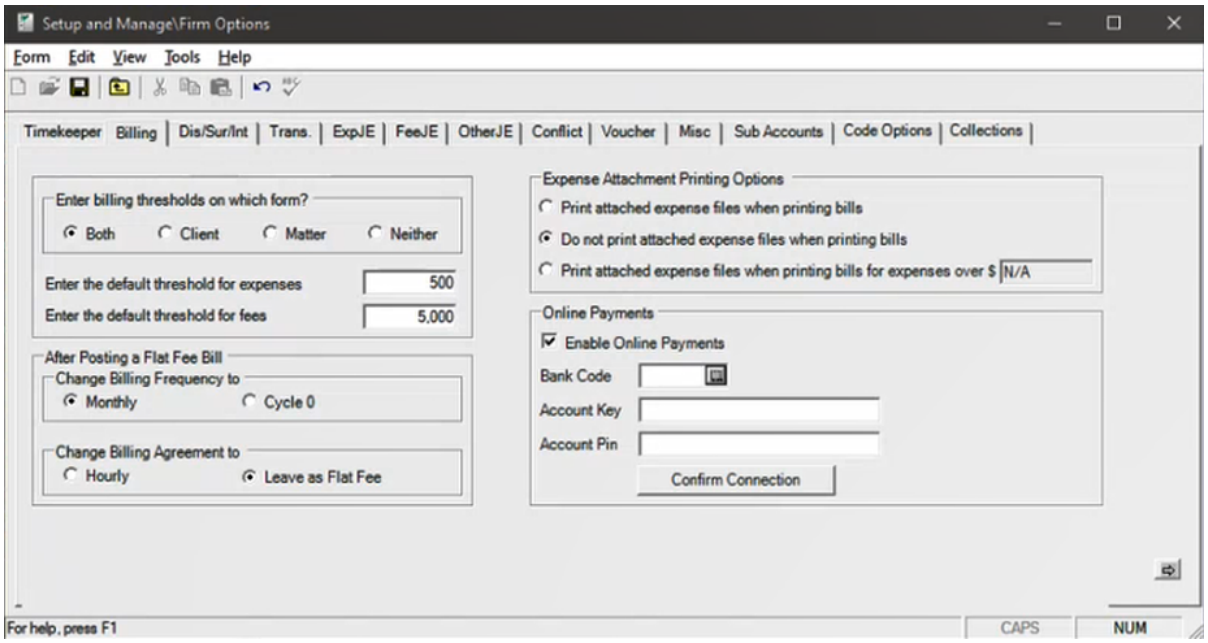
Configure the Billing tab

> **NOTE:** Remember to click the **Save** icon to retain any changes made.



Enter billing thresholds on which form?

Billing thresholds can be set to Both, Client, Matter or Neither. In all cases, the threshold values default to the amounts entered on the billing tab in Firm Options.

- When set to Both, that amount may be changed at the Client or Matter level.
- When set to Client, the amount may be changed at the Client level. The value entered on the Client will be used as the default for all Matters for that Client.
- When set to Matter, the system will allow the amount to be changed on the individual Matters.
- When set to Neither, the system will not allow the threshold amounts to be changed.

Enter the default threshold for expenses.

The amount entered here will be used as the default threshold amount for expenses.

Enter the default threshold for fees.

The amount entered here will be used as the default threshold amount for fees.

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After posting a Flat Fee Bill:

Change Billing Frequency to

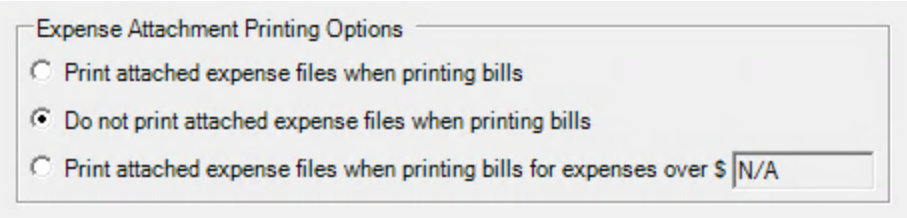
May be set to Monthly or Cycle 0. When set to Monthly, then after posting the first flat fee bill, the system will set those matters to a Monthly billing frequency, which will include the matter for billing whenever monthly bills are selected. When set to Cycle 0, then the matter will only be included for billing when Cycle 0 bills are selected, which effectively eliminates this matter from billing selection unless Cycle 0 bills are specifically selected.

Change Billing Agreement to

May be set to Hourly or Leave as Flat Fee. If set to Hourly, then the amount charged when bills are selected will be determined by the time entries entered and posted for that matter. If set to Flat Fee, then the Flat Fee amount will be charged each time the matter is selected for billing.

Expense Attachment Printing Options

Select the default setting for expense attachments using the options in the **Expense Attachment Printing Options** group.



In general, these settings are used to determine what happens to any existing attachment when printing bills. The selected setting is applied as the default setting for all newly defined clients or matters. You can override this setting for a client or matter, as needed.

> **NOTE:** Changes made to the firm options do not automatically update existing clients or matters. To change this setting for existing clients or matters, manually adjust the **Bill Attachment** setting.

Choose one of the following options:

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- **Print attached expense files when printing bills:** All expense attachments are included when printing bills, if present.
- **Do not print attached expense files when printing bills**: No expense attachments are ever printed with bills.
- **Print attached expense files when printing bills for expenses over $:** Allows you to specify a dollar amount (in the text box to the right of the option). When a bill is over this amount, any expense attachments are included when printing bills.

Online Payments

Clients can make online payments by using an integration when this feature is enabled. Juris sends the billing information to Affinipay who handles the client's payment, then sends an update to Juris with the transaction details.

The first step is to secure a merchant account with AffiniPay (formerly known as ClientPay). Your firm receives an Account Key and Account PIN from AffiniPay, which you enter when configuring the online payments integration.

To enable the Online Payments integration:

1. Select the **Enable Online Payments** check box.
2. Select a **Bank Code** and choose the merchant account from those setup in Juris. This is the account that will be credited when client payments are received.
3. Enter the **Account Key** and **Account Pin** provided by AffiniPay.
4. Click **Confirm Connection**. If any errors occur, correct the Account Key and Account Pin entered, or contact AffinaPay for assistance.
5. Click **Save**.

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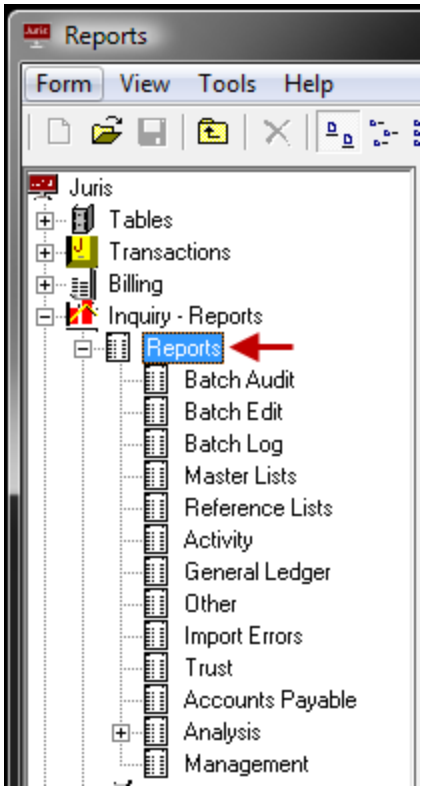
Reports

Preview Reports (View and Print)

The Reports section lists all Juris Reports. The reports are sorted by categories. Click on Reports and the list of report categories will appear. Click on a category to see the reports available. Select any report by double clicking the specific report. Once a report is selected, a window will appear that shows the options available for printing a report. That window and a description of the options are shown below.

To view and print a report:

1. Select **Juris** > **Inquiry-Reports** > **Reports**.



The Reports window displays.

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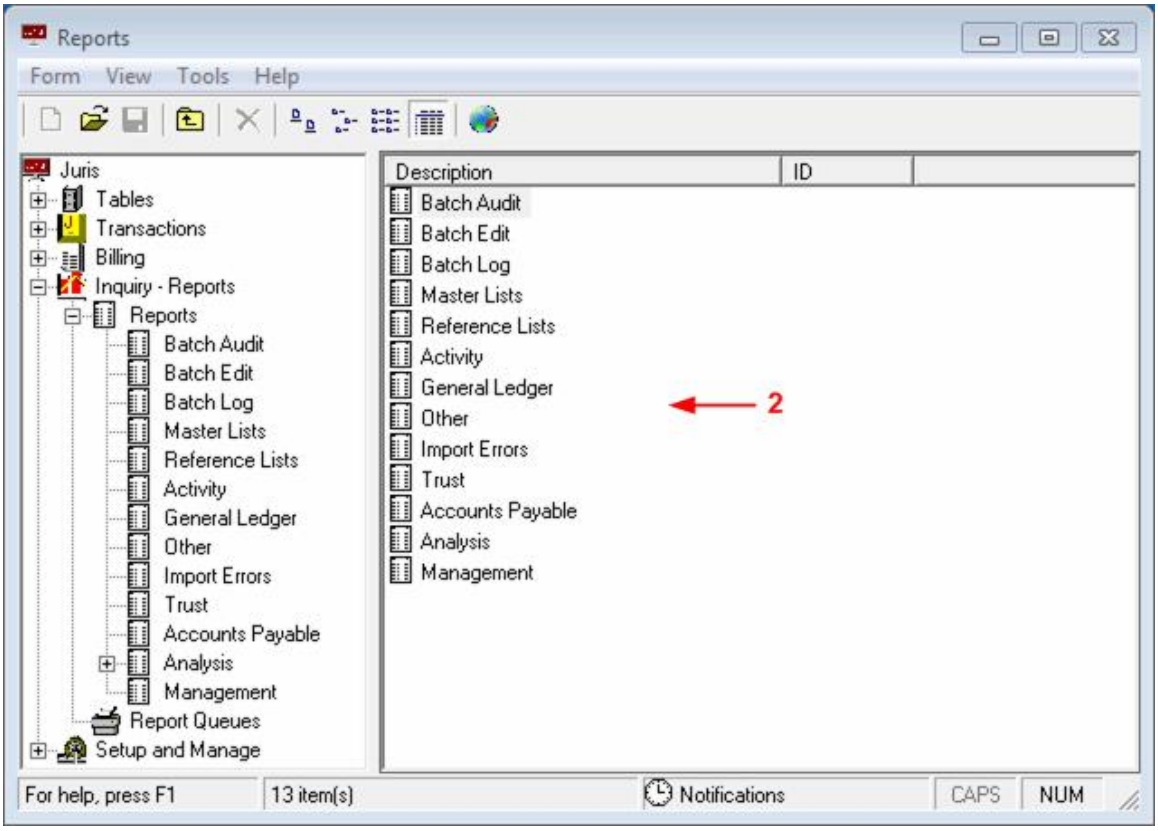
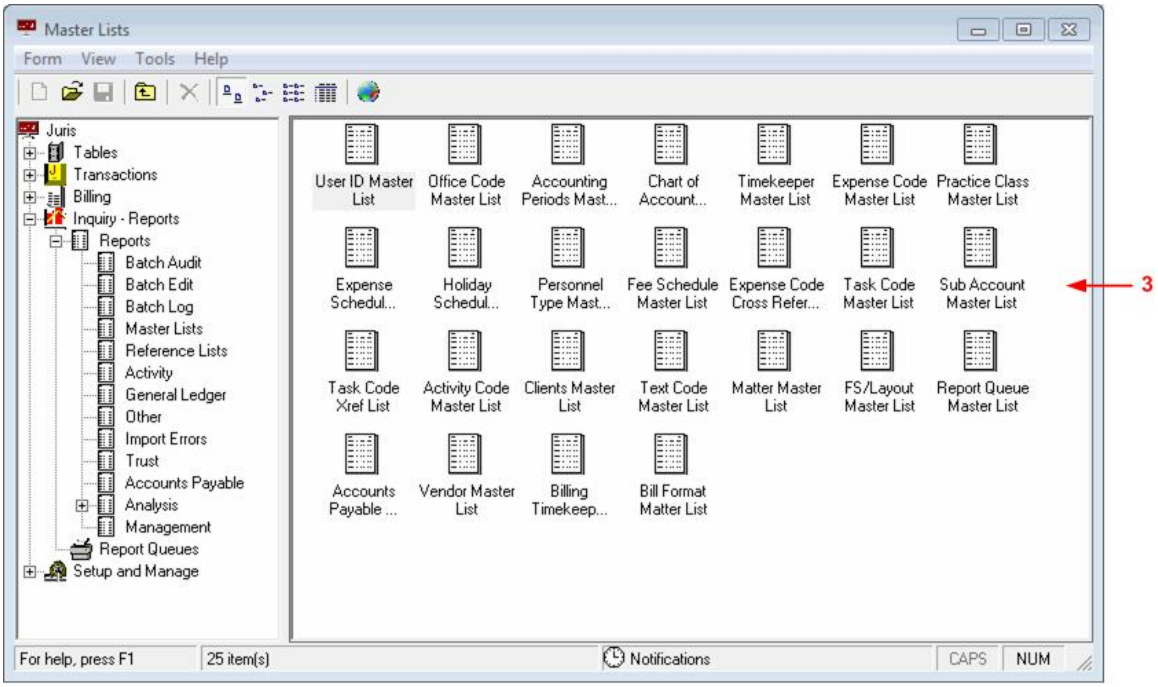


3. Double click on the report you want to view.

   A window containing all the available reports in the selected category displays.



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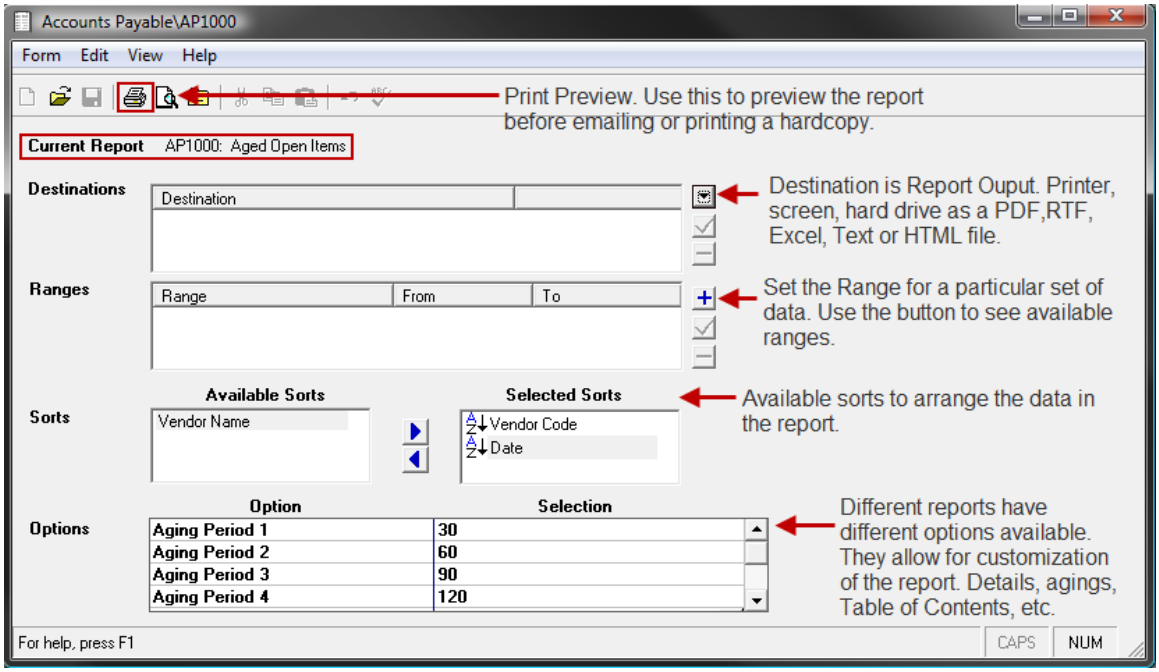
A window containing the requested report displays.



4. To select or change a report's output format or destination printer, use the drop down menu in the **Destinations** field.
5. If the report you selected allows for a range definition, use the **Ranges** field to narrow the range of data that will be presented on the report. Use the + button to review or select from available ranges.
6. Select a sorting method by moving the options from **Available Sorts** to **Selected Sorts** in the **Sorts** field. Note that clicking the A-Z button will toggle the presentation of the report data between ascending and descending order.
7. The content of the **Option** field varies with the report selected. To select an option, click to check the option in the **Selection** column.
8. Click the **Print Preview** icon to look at your output before printing.
9. Click the **Print** icon to print the selected report.

User report rights - assign/remove

To assign or remove a user's report rights:

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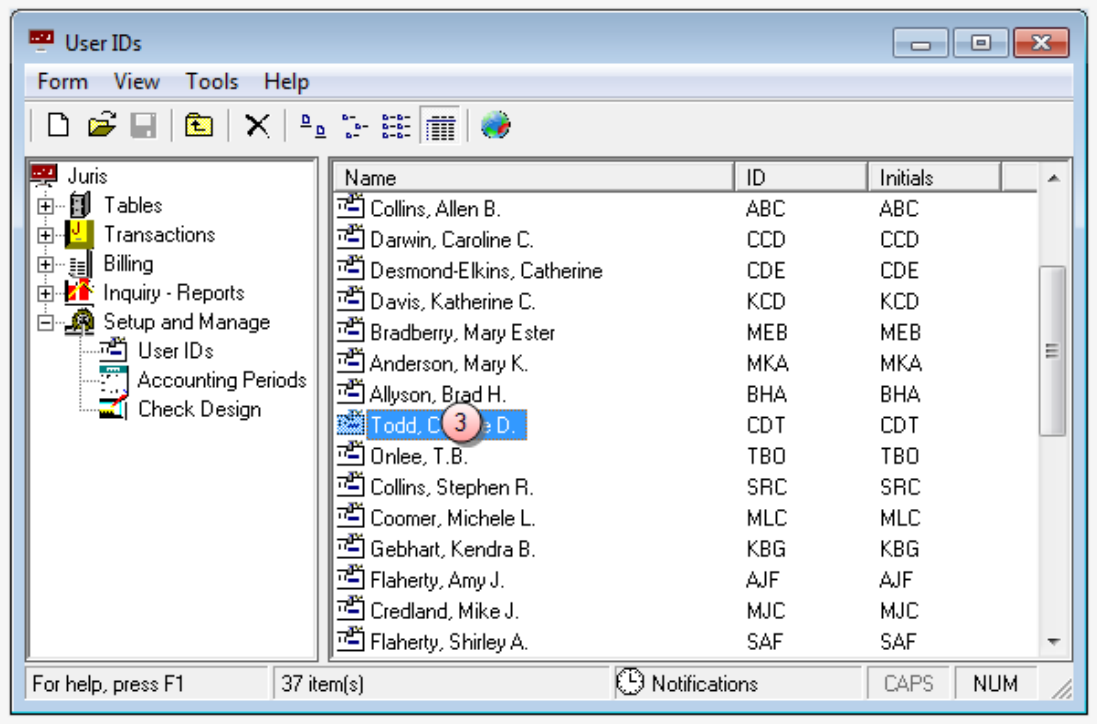
1. Double-click **Setup and Manage**.
2. Double-click **User IDs** to display the list of users on the right side of the window.



3. Double-click on the user for whom you want to assign or remove menu rights.

   The User IDs\[user ID] window opens.

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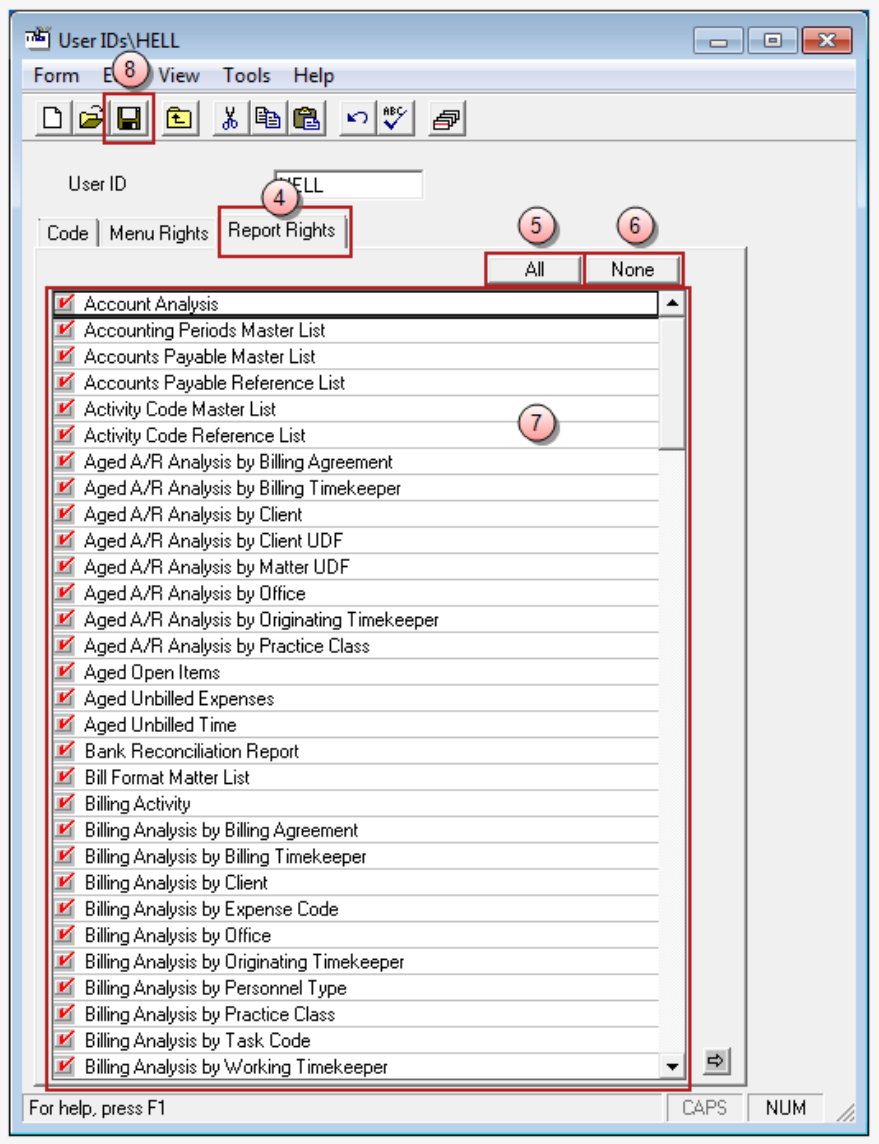

4. Click on the **Report Rights** tab to display it.
5. Optionally, click the **All** button to select all reports at once.
6. Optionally, click the **None** button to deselect all reports at once.
7. Click on each report right you want to assign to the user.

   A check mark indicates that the right has been selected.

   To *remove a report right*, click on it to remove the check mark.

   A blank box indicates that the right is no longer selected.

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8. Click the **Save** button to save the assignments.

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Custom fields

Use a text code

1. In any Narrative field or Note Card, enter a defined Text Code or select the text code using the lookup button.
2. Press the <F2> function key to expand the Text Code to its full narrative.

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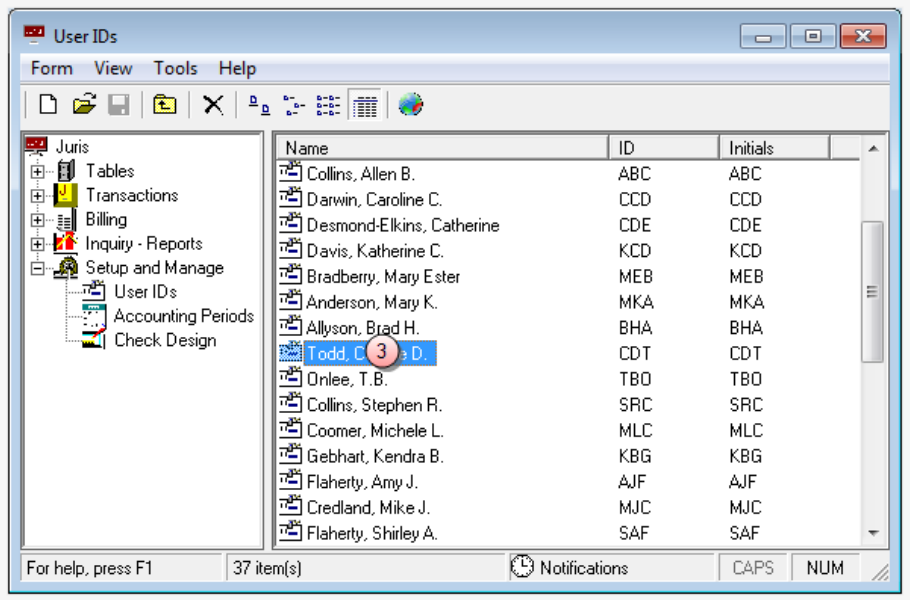
User Menu Rights - assign/remove

To assign or remove a user's menu rights:

1. Double-click **Setup and Manage**.
2. Double-click **User IDs** to display the list of users on the right side of the window.



3. Double-click on the user for whom you want to assign or remove menu rights.

   The User IDs\[user ID] window opens.

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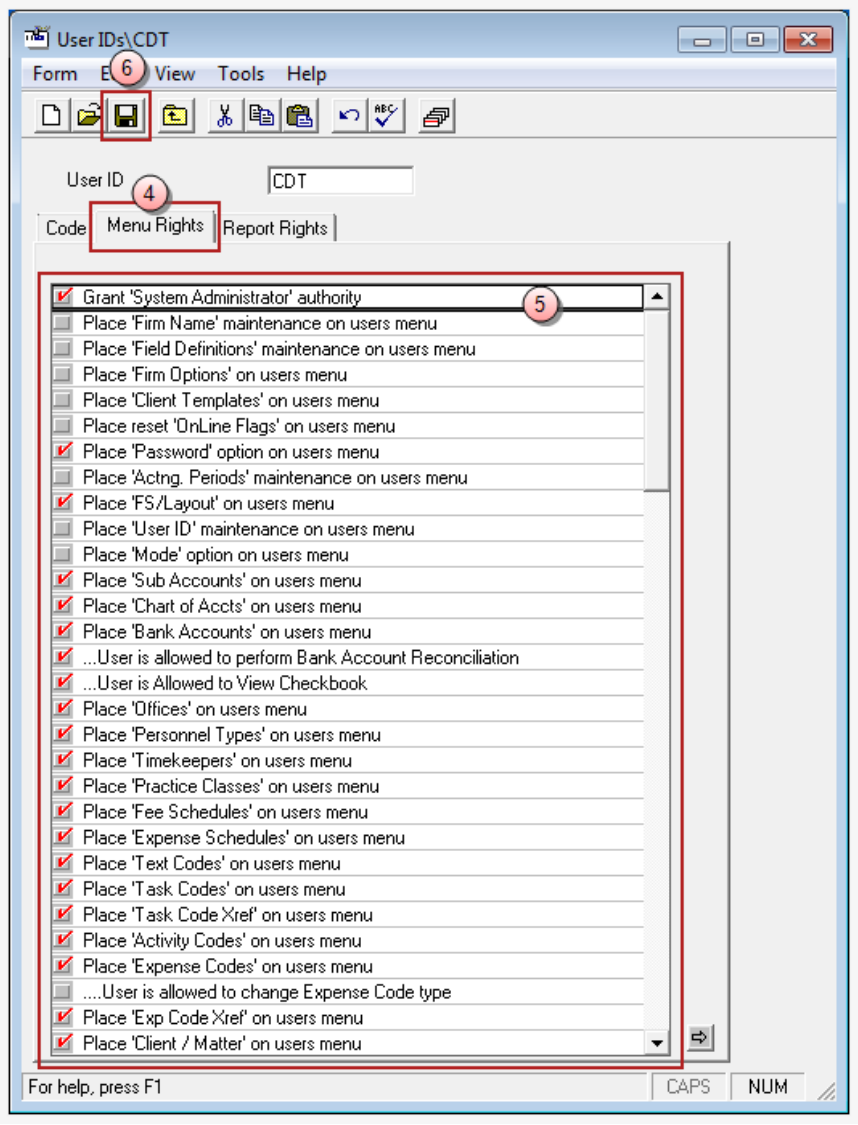

4. Click on the **Menu Rights** tab to display it.
5. Select each Menu Right you want to assign to the user.

> **NOTE:** A check mark indicates that the right has been selected. To remove a menu, right-click on it to remove the check mark.

6. Click the **Save** button to save the assignments.

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Common functions and shortcuts lists

Common Functions

Function	Icon	Tool Menu Mouse Click	Tool Menu Key Stroke	Keystroke Shortcut
New		Form > New	Alt + F > N	Ctrl + N
Open		Form > Open	Alt + F > O	Ctrl + O
Save		Form > Save	Alt + F > S	Ctrl + S
Back a level		Form > Close	Alt + F > C	Ctrl + H
Cut		Edit > Cut	Alt + E > T	Ctrl + X
Copy		Edit > Copy	Alt + E > C	Ctrl + C
Paste		Edit > Paste	Alt + E > P	Ctrl + V
Undo		Edit > Undo	Alt + E > U	Ctrl +Z
Spell Check		Tools > Spelling	Alt + T > S	F7
Find (lookup)		Tools > Find	Alt + T > F	F5
Find (lookup)		Tools > Find	Alt + T > F	F5
Delete		Form > Delete	Alt + F > D	none
Close		Form > Close	Alt + F > C	F4
Drop-down		none	none	none
View/Hide Toolbar	none	View > Toolbar	Alt + V > T	none
View/Hide Status Bar	none	View > Status Bar	Alt + V > B	none
Ready to Post	none	Tools > Ready To Post	Alt + T > R	none

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Function	Icon	Tool Menu Mouse Click	Tool Menu Key Stroke	Keystroke Shortcut
Preferences	none	Tools > Preferences	Alt + T > P	none
Help	none	Help > Help Topics	Alt + H > H	F1

Shortcuts

Shortcut	Action
F1	Opens Help
F2	Use after typing in the text code to expand the text. Clears invalid field in Cash Receipts
F4	Opens drop down lists (when available)
F5	Opens the Find (lookup) tool.
F6	Opens ZOOM in Cash receipts to view/edit cash allocations.
F7	Runs Spell Check
F8	Runs Wizard cash allocation in Cash Receipts. Allocates amount to G/L account on G/L Distributions in Vouchers. Allocates amount to expense code on Expense Distributions in Vouchers
F9	Using this key will repeat , field by field, the value used in the previous transaction.
F10	Activate the Menu Bar
F11	Opens G/L Distribution form in Vouchers. Shows Prebill Format in Edit Prebills.
F12	Opens Expense Distribution form in Vouchers.

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Shortcut	Action
	Shows Final Bill Format in Edit Prebills.
Down Arrow	Opens lookup for field options (when lookup is available)
Ctrl + Enter	Inserts a blank line in a field (use in narratives, address, etc.)
Ctrl + Tab	Inserts a tab in a field (use in narratives, address, etc.)
Tab	Move forward, field by field.
Shift + Tab	Move backwards, field by field.
Ctrl + Right Arrow	Move to the beginning of the next word in a field.
Ctrl + Left Arrow	Move to the beginning of the previous word in a field.
Ctrl + Shift + Right Arrow	Highlight the next word
Ctrl + Shift + Left Arrow	Highlight the previous word.
Ctrl + O	Open selected item.
Alt + F4	Close the current window.
Ctrl + F	Opens the Find tool.

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Glossary

A

Accrual Accounting
An accounting method whereby fees or expenses are recognized as income when incurred.

ADP
Automatic Data Processing

Alphanumeric
May contain any letter, number or symbol on the keyboard. However, avoid the use of backslashes or quotes whenever possible.

Authentication
The process of identifying a person through a username and password.

Authorization
The process of granting or denying access to a resource.

B

Balance Sheet
A financial statement that presents the firm's assets, liabilities and owner's equity as of a particular date (the date of the statement). Also known as a Statement of Financial Condition.

Billed Accounting
The Billed method of accounting is a modified version of Accrual Accounting - where fees and expenses are recognized as income when billed.

Billing Thresholds
A billing threshold can be used to generate a bill before its normally scheduled time if fees and expenses have gone above the defined threshold amount. This is helpful in assuring that a firm does not advance excessive hours or out-of-pocket expenses to a client.

Billing Timekeeper
The timekeeper who is in day-to-day charge of a Client or Matter. Typically the billing Timekeeper would be responsible for all transactions for that Client or Matter,

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including trust account responsibility.

BX

Bill Export

C

Case Sensitive

Indicates that the case of the characters is significant; i.e., "John" is not equal to "john".

Cash Accounting

The Cash method of accounting is where fees or expenses are recognized as income when payment is received.

Cash Expense

A hard cost for the firm, i.e., an expense that is out-of-pocket for the firm. Court fees advanced, long distance charges and copies and printing done by a vendor and charged to the firm are examples of cash expenses.

Contingency

Bill amount is contingent upon the outcome of the case. Fee is calculated same as Hourly by the fee schedule assigned to the matter.

CSV

Comma Separated Values

F

Fee Total Retainer Type

The amount entered in as the retainer is the amount of the fees the client will be charged plus additional charges for expenses that are incurred.

Flat Fee (billing)

Flat Fee billing bills the Flat Fee amount entered one time. Once this item is billed, Firm Options will set new billing agreements based on settings established in Firm Options. (See Retainer Billing)

H

Hard Cost

Hard Costs are referred to as cash expenses in Juris

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Hourly (billing)

Calculated hourly rate based on the Fee Schedule rates assigned to the matters

I

IOLTA

An acronym for "Interest On Lawyer Trust Accounts." IOLTA accounts are accounts where the interest earned on the account is diverted to a fund to be used for charitable purposes, such as funding legal aid.

M

Minimum Bill Retainer type

The bill total (fees + expenses) will always be AT LEAST the amount of the Retainer. If the fees+expenses go over the Retainer amount, then the bill total will be greater than the Retainer. If the fees/expenses total less than the Retainer amount, then the bill total will be the Retainer amount.

Minimum Fee Retainer Type

The Fee amount on their bill will always be AT LEAST the amount of the retainer. If the fees go over the Retainer amount, the fee total will be greater than the Retainer. If the fees total less than the Retainer amount, the fee total will be the Retainer amount. In all cases, expenses will be charged additionally.

N

Network ID

The ID that a person uses to Login to their network.

Nonbillable

Hours recorded in the system with no dollar value associated with them. If hours are entered with a zero value, then it those are considered as non-billable. If entered with a value, it is considered billable, and when billed at no charge will be treated as a markdown. When non-billable hours are "billed", the timekeeper's effective or billed rate will be affected. The effective or billed rate is determined by dividing the amount billed by the hours billed, thus billed nonbillable hours will increase the number of hours which are divided into the amount.

Noncash Expense

A soft cost for the firm. Copies made from a firm-owned copy machine, and faxes sent from a firm-owned fax machine are examples of noncash expenses.

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Numeric

A value that may contain numbers only (no letters or symbols)

O

Originating Timekeeper

A Timekeeper who is given credit for the induction of a client or matter to the firm. Sometimes bonuses are calculated based on the amount of fees generated from the clients that a Timekeeper brings to the firm.

P

P&L

Profit and Loss

Prepaid

Prepaid funds are monies that have been paid to the attorney, but have not been earned.

Pro Bono (billing)

Works much the same as Non Billable. If selected, Time Entry 'Billable Time' fields for this Matter will be unmarked. This field may be overridden. If the entry is not marked as Billable Time, the Fee Amount is automatically calculated as 0.00.

Profit and Loss

A financial document, showing earnings, expenses, and net profit. also called an income statement or earnings report.

Proximo

in the next month

R

Retainer

A retainer is a fee paid to secure the services of an attorney at the exclusion of all other adverse or potentially adverse parties. A true retainer is not a deposit or an advance payment, it is fully earned when paid.

Retainer Billing

in Juris is similar to Flat Fee billing except that the same amount is billed every month, whereas Flat Fee billing has the option to bill the fee amount just once. Retainer types are Total Billed, Fee Total, Minimum Bill, and Minimum Fee.

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S

Soft Cost

Soft costs are referred to as noncash expenses by Juris

Status Bar

The Status Bar shows the current status of the application and is typically shown at the bottom of the form. Number of current items, status of the CAPS and NUM locks, and scheduled notifications are typically shown on the status bar.

T

Task Based (billing)

Same as hourly billing but requires Task Code be entered in Time Entries. Optional requirements may be set for Activity Codes and Tasks on Expense Entries.

Toolbar

The toolbar is a row of icons that are typically listed at the top of the form. Icons for New, Save, Undo, and others are typically among the toolbar options.

Total Billed Retainer Type

This means the amount entered in the retainer is the amount the client will be billed regardless of how much time is worked and expenses entered. The client would be billed this amount for each month or however often as determined by billing frequency.

U

UDF

User Defined Field. These may be established in Setup and Manage > Define Fields.

X

Xref

Cross reference

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