



Cloud-based time, billing & accounting for law.

Housekeeping

- 1 hour presentation plus 30 min Q&A
- All audience microphones are muted
- Ask questions at any time using the questions feature
 - They will be answered by one of our facilitators or during the Q&A section
- Presentation will be recorded and distributed to all registrants



Meet the Host: Deborah Schaefer

Deborah is a Certified Public Accountant in Connecticut and New York, who specializes in the selection, implementation, training, and support of computer-based accounting systems for law firms. Practicing for over 35 years, she has worked with hundreds of firms across the US and internationally.

In addition to Soluno, Debbie also supports a variety of other software products.



Agenda

- Usability
- Client/Matter
- Data Entry
- Billing
- Accounting
- Reporting
- Dashboards
- Integrations
- Q&A Session

Usability

Mouse & keyboard shortcuts

Toggles

2-factor authentication

User settings

Security

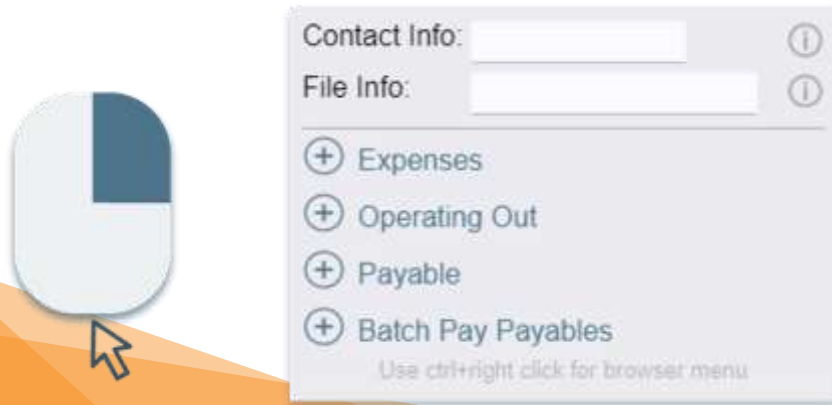


USABILITY:

Mouse & Keyboard Shortcuts

Mouse: Right Click

- Quick access to Contact and File information
- Add customized favorites in your User Profile for quick access.



Keyboard: Copy and Paste

You can now copy and paste in all grids; including the timesheet.

- Copy
 - CTRL-C in Windows / Command-C in Mac
- Paste
 - CTRL-V in Windows / Command-V in Mac

**note: some fields require a space before performing a shortcut*

USABILITY:

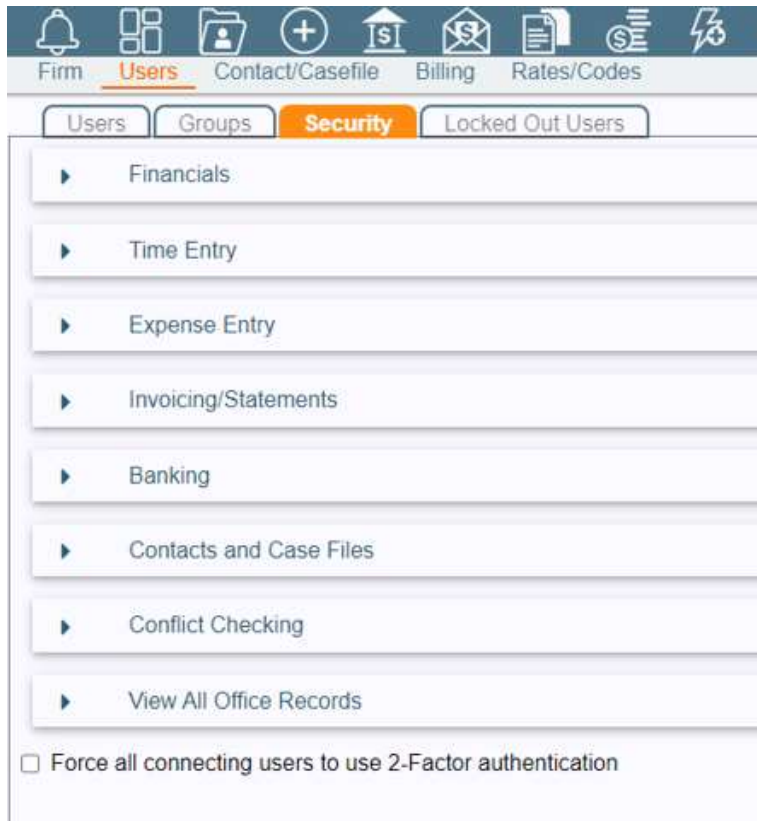
Toggles

- All settings have been changed to slide toggles
- Green is on, blue is off

- Hold Emails for Manual Release
- Enable Release Invoice stage in billing
- Enable Trust Entry Start Date in billing
- Allow Time and Expense entries to be placed on Hold for Billing

USABILITY:

2-Factor Authentication

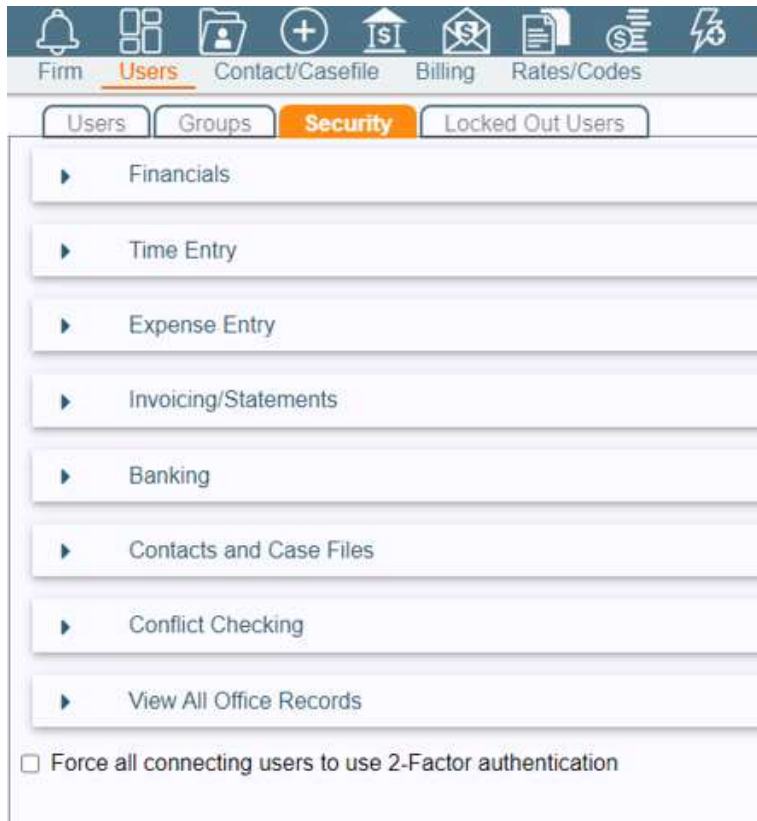


Administrator Settings → Users
→ Security → Bottom of Screen

- Turns on 2-Factor authentication for all users

USABILITY:

2-Factor Authentication, cont'd



- Authenticate via...
 - SMS – Texts phone number on the user record
 - Email – Email sent to login email
 - Authenticator App –
 - Microsoft
 - Google apps
 - Duo Mobile

USABILITY:

User Settings

Allows users to customize their Soluno settings:

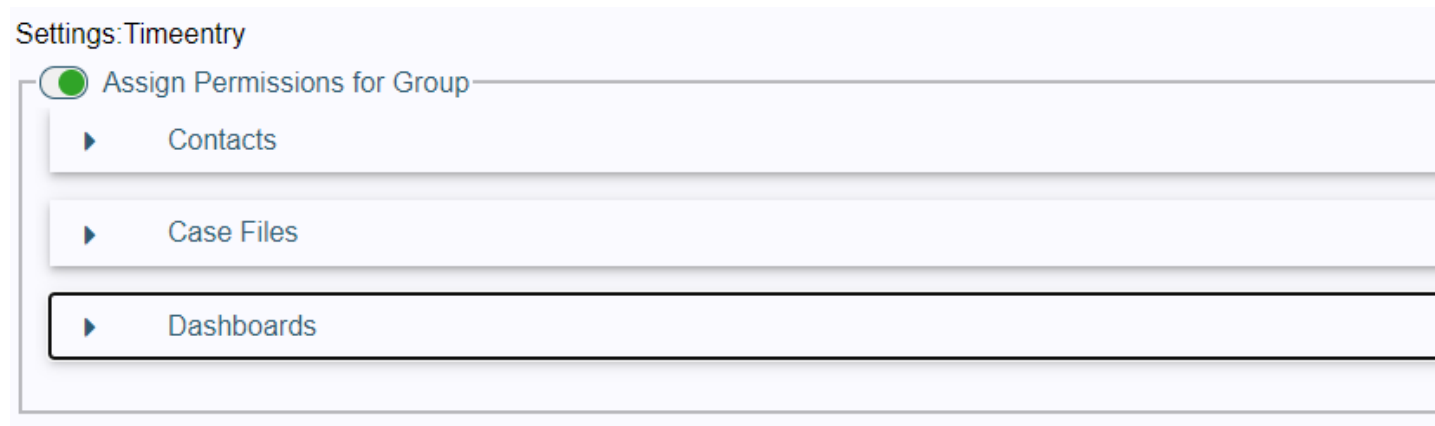
- Change passwords & verification questions
- Activate Microsoft Office 365 integration
- Preferences
- Add favorites
- Submit feedback



USABILITY:

Security

- Security for contacts and files has been improved





Client/Matter

- Contact numbering
- Billing/file defaults
- Referral source fields
- Conflict search
- File number display
- File manager

CLIENT/MATTER:

Contact Numbering

Contact Type

To retrieve the next available number, please select the type of contact being created.

Contact Type

Client

Client

Vendor

Other

Administrator Settings → Firm → Settings → File

- Separates contact numbering for different contact types

When a new contact is entered, the user is prompted to identify a contact as...

- a Client
- a Vendor
- Other

CLIENT/MATTER:

Billing/File Defaults

- Option to use separate attachments on each invoice.
- Available when correspondence is set to Email or Print and Email

Billing/File defaults

Billing Group default	Tax Group default	Interest Group default	Rate Group	File Group default
--------------------------	----------------------	---------------------------	------------	-----------------------

Preferred Correspondence Method
Print

Use Separate Attachments for each invoice

Additional Contacts to notify (CC) during billing:

Contact Number	Description	Name
----------------	-------------	------

CLIENT/MATTER:

Referral Source Fields

Referral source fields have been expanded:

▼ Referred Info		
Referred By User	Contact	Source
_____	_____	_____

CLIENT/MATTER:

Conflict Search



- Now allows exact matches via the use of ~
 - Ex: entering John~Smith will display only exact matches for 'John Smith'
- Separate names with a semicolon ;
- Files within NetDocuments will be searched
 - Includes contextual searching
- Displays 250 results for users and 1,000 for administrators

CLIENT/MATTER:

File Manager

- Lead and assigned attorney shown in top banner of File Manager
- New icons allow the file address to be:
 - copied to clipboard
 - opened in a map locator



File Manager	Contact Manager	Conflict Search	New File	New Contact	New Group Contact
12-1	▶ (555) 444-3332	Smith, Sam		8369 My street, Suite 1600, Any City, Any State, 12345	
Contact 12	▶ AlanT@DevlosSoftware.com	Alan Tuback/DD/DP		General matter	
	Corporate			 	

CLIENT/MATTER:

File Number Display

- Option to show uppercased case file names on reports, invoices, and other forms

Settings	General Ledger Accounts	Bank Accounts	Areas of Practice	Department Codes	Service Configuration
Firm	Features	File	Banking		
Defaults					
Billing Group default	Tax Group exempt	Interest Group default	Rate Group standard	File Group default	
Charge Hold					
<input type="checkbox"/> Trust Receipt Hold					
Days to Hold Receipt <input type="text" value="0"/>					
Files on hold - New data entry requires:					
<input type="radio"/> Administrator Authorization					
<input checked="" type="radio"/> User Authorization					
Other Options					
<input type="checkbox"/> Force Address for Contacts					
<input type="checkbox"/> Force City for Contacts					
<input type="checkbox"/> Force State for Contacts					
<input checked="" type="checkbox"/> Force Description for Files					
<input type="checkbox"/> Uppercase case files on invoices, reports, and forms.					
Automatic File Numbering					

Data Entry

Time entry worked vs. billed

Keyboard shortcuts

Trust Transfers

Multiple check layouts

Bank-required activity files

Payables

Check requests

Tax allocations

3 decimal expense rate

DATA ENTRY:

Time Entry Worked vs. Billed

Time/Fees	Expenses	Operating In	Operating Out	Payable	Batch Pay Payables	Trust In	Trust Out	Transfer				
✓		Date	File	Client Name	Fee Earner...	Task	Working	Billable	Rate	Amount	Act Code ...	Explanation
✓	🕒 4:00:00	May 13, 2020	10-1	👤 Ross, Stuart J	AT	bw	4:00	1:00	200.00	200.00	ct	Correspondence to client
✓	🕒 2:00:00	May 13, 2020	1-1	👤 Bartlett, John	AT	bw	2:00	0:30	200.00	100.00	a103	Draft/revise document

- Each time entry has worked time and billed.
- Any changes at the time of the billing are now recorded in the billed field.
- Time reports by worked or billed hours
- Daily Time Summary shows both Billed and Worked

DATA ENTRY:

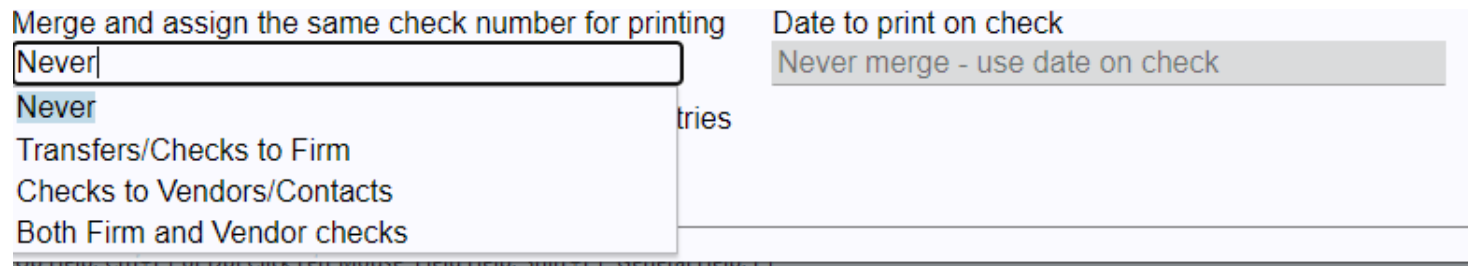
Trust Transfers

Administrator Settings → Firm → Settings → Banking

- Ability to put all trust transfers on one entry

Administrator Settings → Firm → Settings → Features

- Can now select check or ACH as type of transaction



DATA ENTRY:

Multiple Check Layouts

- Soluno now supports multiple check layouts
- Layouts can be customized
 - By user
 - By bank
 - By user and bank account

DATA ENTRY:

Bank-Required Activity Files

Bank Admin → Nacha

- Configure Soluno to send banks a daily list of checks created
- After configuration the user can create the necessary file and upload it to the bank

DATA ENTRY:

Payables

 Preserve Payable Allocations on Money Out entries

Administrator Settings → Firm → Settings → Banking

- Payable explanations can now carry over to the General Ledger
- AP Checks have space for more invoices
- Matters show on check stub

DATA ENTRY:

Check Requests

Check Request

Require all Check Request to be printed (requires create and view permissions)

Administrator Settings → Firm → Settings → Banking

- Ability to force Requested check to print

DATA ENTRY:

Tax Allocations

Enable Blended Tax Payments

Administrator Settings → Firm → Settings → Banking

- Tax payments will be proportionately allocated to receipts

DATA ENTRY:

3 Decimal Expense Rate

- Expense rates now display up to the thousandths column



Billing

- New fields on bills/prebills
 - Flat fees
- Past-due statements
- Recreate bills & statements
 - Invoice templates
 - New check options

BILLING:

Additional Fields on Bills & Prebills

There is now an added column containing the activity code for a bill or prebill.

- Useful for electronic bills

Show For Fee Entries								
Date	Description	Activity Code	Task	Initials	Hours	Rate	Amount	
Always	Always	Never	Never	Always	Always	Drafts only	Always	

BILLING:

Flat Fee


- Invoice templates can hide adjustments to flat fees
- Invoice templates can display only the flat fee amount

BILLING:

Past-Due Statements

- Ability to specify a start date when running statements.

Statements Options

View pastdue Unpaid invoices 

View Parameters

Start Date End Date Contact Collecting Ignore contacts invoiced within X days 15

File Responsible Area of Practice

Include fully paid invoices

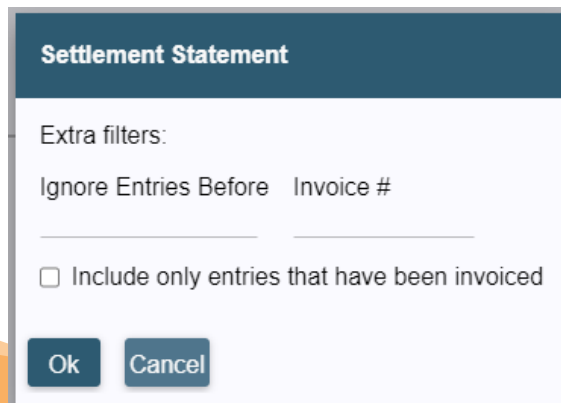
Ignore files with invoice in request stage

Billing Group Tax Group Interest Group Rate Group File Group Tag

BILLING:

Recreate Bills & Settlement Statements

- Ability to recreate bill from current or legacy system.
 - Enter invoice number in **Invoice #** field → Select Settlement Statement → Enter dates or Press **OK**.
- Settlement statement with dating
 - Billing → Request Invoice → Enter file number → select option for Settlement Statement



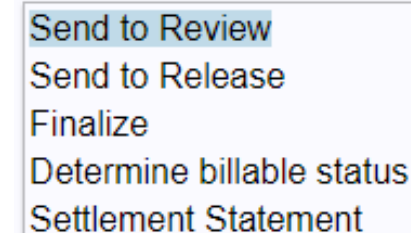
Settlement Statement

Extra filters:

Ignore Entries Before Invoice #

Include only entries that have been invoiced

Ok **Cancel**



Send to Review
Send to Release
Finalize
Determine billable status
Settlement Statement

BILLING: eBilling

- New eBilling formats:
 - CounselLink
 - Open Invoice

- Ability to specify client number

Not using electronic billing

Ledes98B

Ledes98BI (International)

Ledes 2000

Ledes 2.0

Open Invoice

CounselLink

Electronic Billing

Ledes98B

Information required for format

Client Matter Number

Client Id (optional)

Description of work performed on invoice (optional)

BILLING:

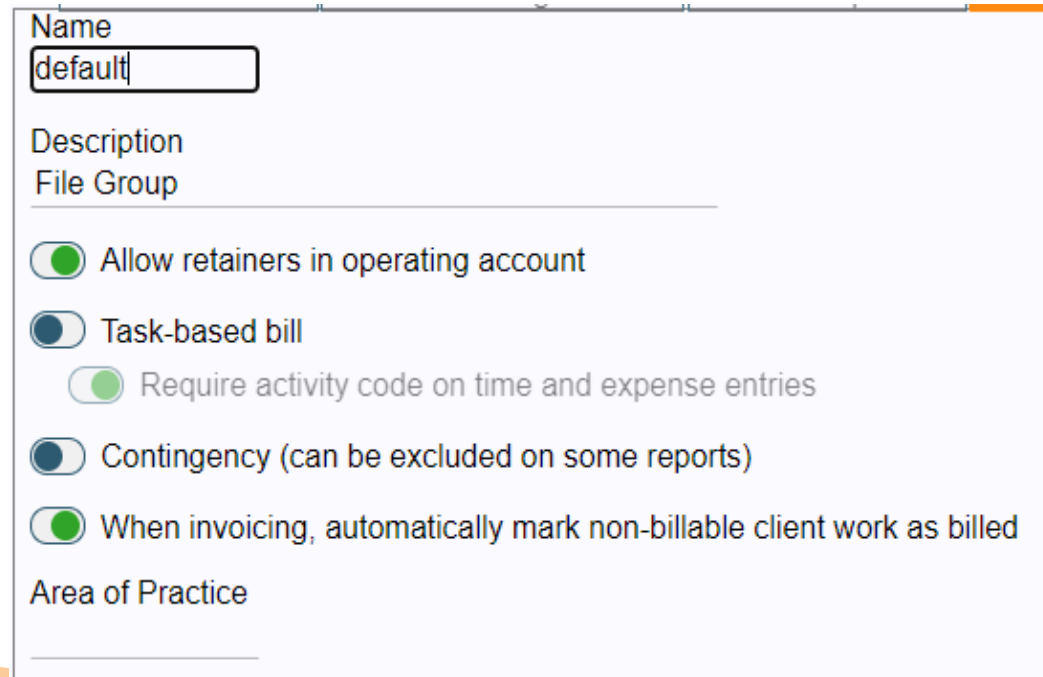
Invoice Templates

- Font on Invoice
- Formula tokens for bill displays
 - Can also calculate from amounts in custom fields
- Many new tokens on Billing
 - Responsible Lawyer
 - Draft vs Final
 - Client communication method
 - Client number

BILLING:

Invoice Templates, cont'd

- Non-billable time can be marked as already billed and offloaded from Work In Progress reports



A screenshot of a software configuration window for an invoice template. The window has a white background and a thin orange border. It contains the following fields and options:

- Name:** A text input field containing the word "default".
- Description:** A text input field containing the words "File Group".
- Allow retainers in operating account:** A radio button that is selected (filled with green).
- Task-based bill:** A radio button that is not selected (empty).
- Require activity code on time and expense entries:** A radio button that is selected (filled with green).
- Contingency (can be excluded on some reports):** A radio button that is not selected (empty).
- When invoicing, automatically mark non-billable client work as billed:** A radio button that is selected (filled with green).
- Area of Practice:** A text input field that is currently empty.

Invoice Templates, cont'd

- Ability to have \$0.00 charges appear as 'no charge' on client invoices
- Invoice numbering
 - Split client invoicing will have a root invoice number plus an individual number for each sub-invoice
 - Administrators can adjust sequential invoice numbers
- Option to hold email invoices for review and revision before sending

BILLING:

New Check Options

- Option to consolidate multiple payments onto one check
- Ability to put an alternate payee name on checks

Accounting

Bank reconciliation enhancements

Financial statements

Bank Reconciliation Enhancements

- Ability to see deposit slip details and combined checks in bank rec.
 - Click on the + sign
- Able to click on a cleared transaction from anywhere on the row
- Bank rec report can be generated with checks in check number order
- Drag and drop receipts to connect to a deposit slip

ACCOUNTING:

Financial Statements

- General Ledger report can show Department, Category, and Cost Center



Reporting

Productivity reports

Receivable report by client

REPORTING:

New Productivity Reports

Views and Reports → Receivables → Productivity


- Billing Productivity
 - Amount billed by working attorney by responsible attorney
 - Billed, Payments, Adjustments
- Time Entered
 - Time entered by timekeeper grouped by responsible attorney
 - Hours, Amount Billable
- Time by Responsible
 - All files by responsible attorney
 - Billable time entered, Billed, Collected adjustments
- Time by Working
 - Time entered by timekeeper or by responsible attorney
 - Billable time entered, Billed, Collected adjustments

REPORTING:

Receivable Report by Client

- New receivables report option creates a new page for each lawyer (title and total)

Receivables Options

View by client Receivables by Client 

View Parameters

Start Date End Date Invoice # File Collecting

Contact Responsible Area of Practice

Balances as of Current

Age from Today

Fee Split Method: GL Allocation

Entry Sort Order: Entry Date->Entry Number

Include fully paid invoices
 Group cases by responsible

Billing Group Tax Group Interest Group Rate Group File Group Tag



Dashboards

My Time

Banking

File



DASHBOARDS:

My Time

- Calendar allows view of time with the ability to drill-down for each day
 - The time displayed is for the user who is logged in
- Links with Office 365 to show emails and calendar entries
 - These entries can be saved to a file or used to create time entries
- Timekeeper goals are tracked and displayed
 - These can be set up in Administrator Settings

DASHBOARDS: Banking

- Bank Balances are shown for all bank accounts accessible by the user
 - No balances will be displayed if the user doesn't have access
- Administrators now get a Cash Flow view that includes additional banking information

DASHBOARDS:

File

- Displays totals for all files associated to the user.
 - Billed, Unbilled, Accounts Receivables, Retainers, and Total Trust
- Shows firm summary for all files in the firm
- Displays other Responsible Attorney File data
- User access is controlled by security settings



Integrations

LawPay
Office 365
More

INTEGRATIONS:

LawPay®

- Receipts entered through LawPay are automatically entered in Soluno
- User is able to confirm file and client and process the receipt afterwards

LAWPAY®

INTEGRATIONS:

Microsoft Office 365®



User Settings → User Profile → Microsoft® Account

- Transfers contacts between Outlook and Soluno
- Emails and calendar appointments are synced onto your calendar dashboard

Never - manual only

Vendors only

Contacts related to files I'm responsible for

Contacts related to files I'm listed as staff

Vendors and Contacts related to files I'm responsible for

Vendors and Contacts related to files I'm listed as staff

Always (can cause performance issues)

Other Integrations





Thank you for joining us