soluno®

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

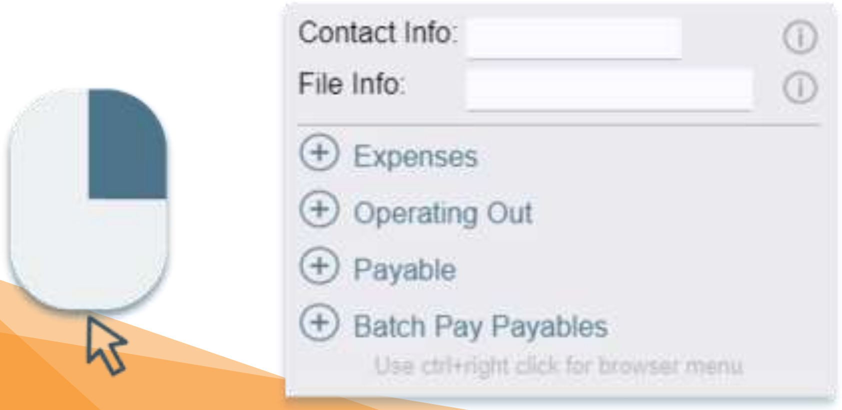
Security

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

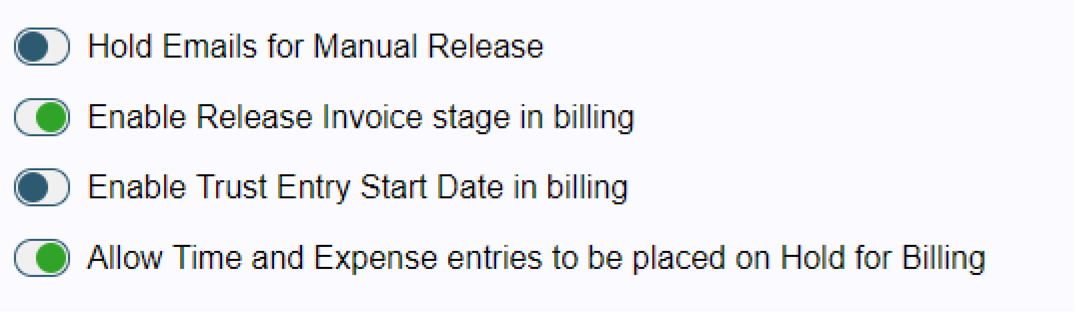
You can now copy and paste in all grids; including the timesheet.

- 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*

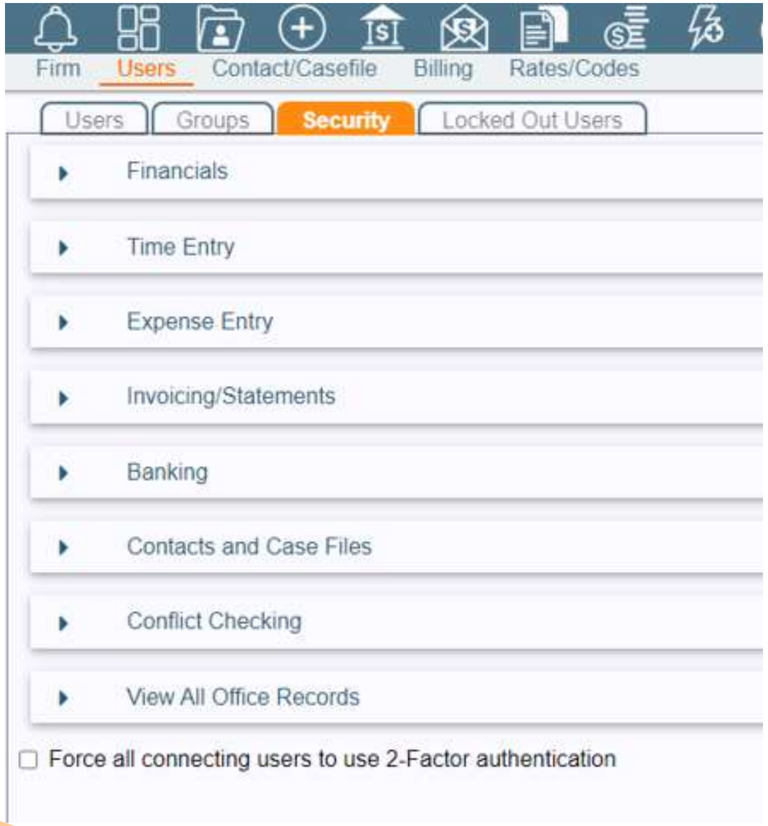
Toggles

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



USABILITY:

2-Factor Authentication

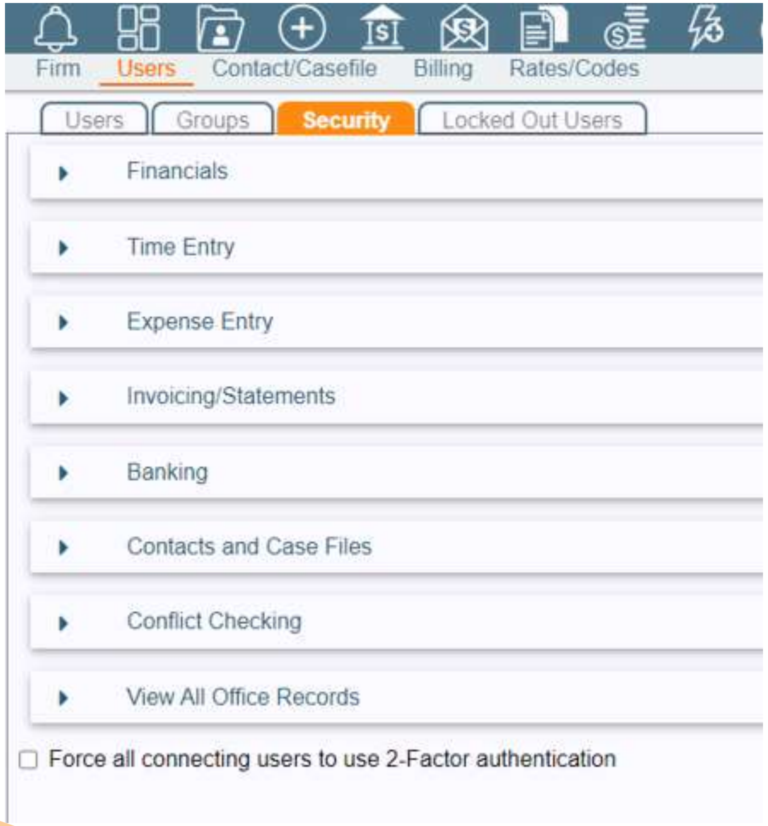


Administrator Settings → Users → Security → Bottom of Screen

- 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

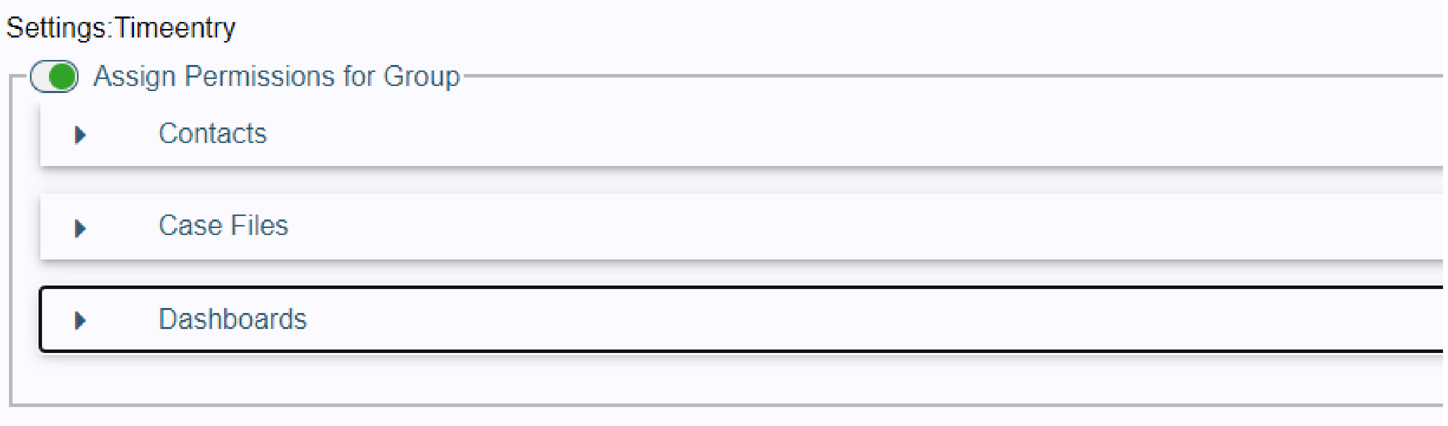
Allows users to customize their Soluno settings:

- 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

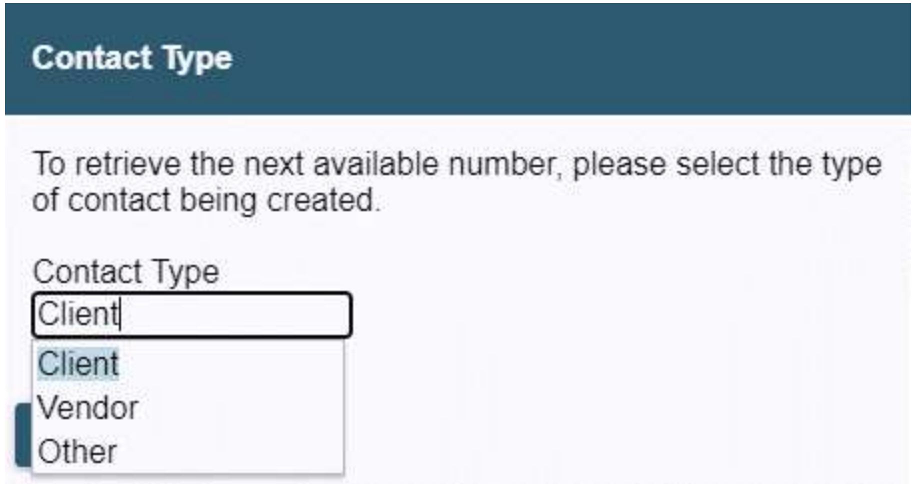
Referral source fields

Conflict search

File number display

File manager

Contact Numbering



Administrator Settings → Firm → Settings → File

- Separates contact numbering for different contact types

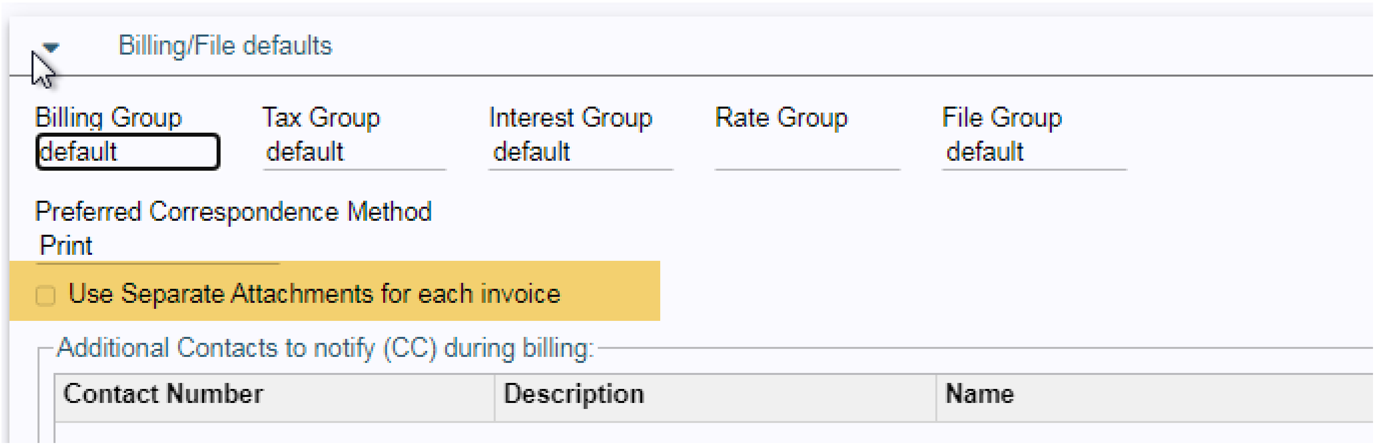
When a new contact is entered, the user is prompted to identify a contact as…

- a Client
- a Vendor
- Other

CLIENT/MATTER:

Billing/File Defaults

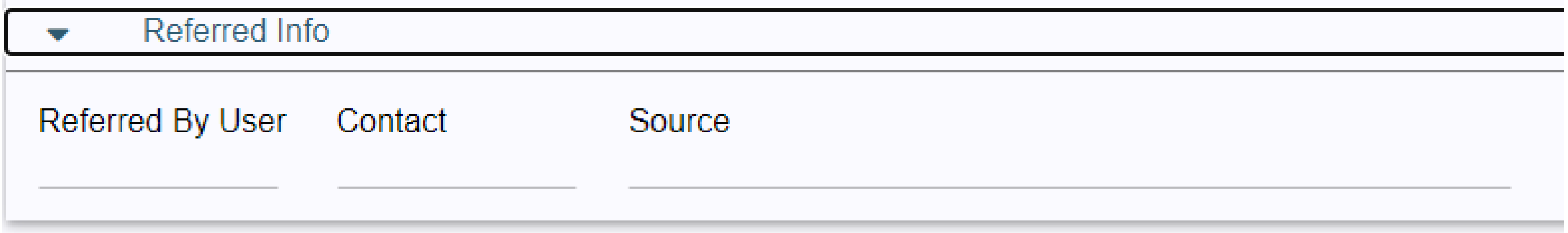
- Option to use separate attachments on each invoice.
- Available when correspondence is set to Email or Print and Email



CLIENT/MATTER:

Referral Source Fields

Referral source fields have been expanded:



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 ;

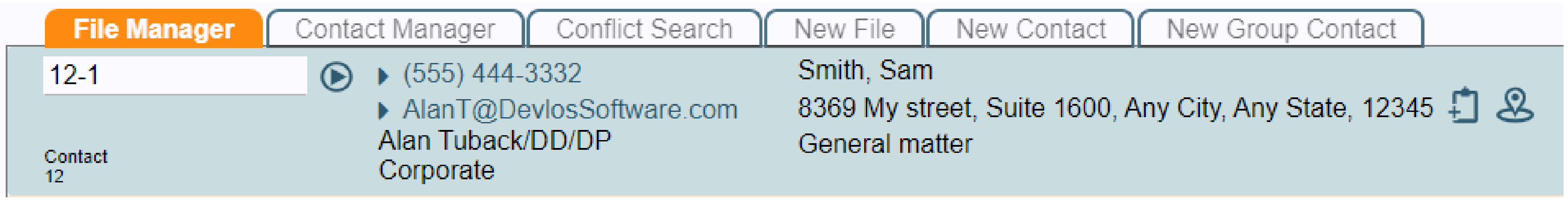
- Files within NetDocuments will be searched
  - Includes contextual searching

- Displays 250 results for users and 1,000 for administrators

CLIENT/MATTER:

File Manager

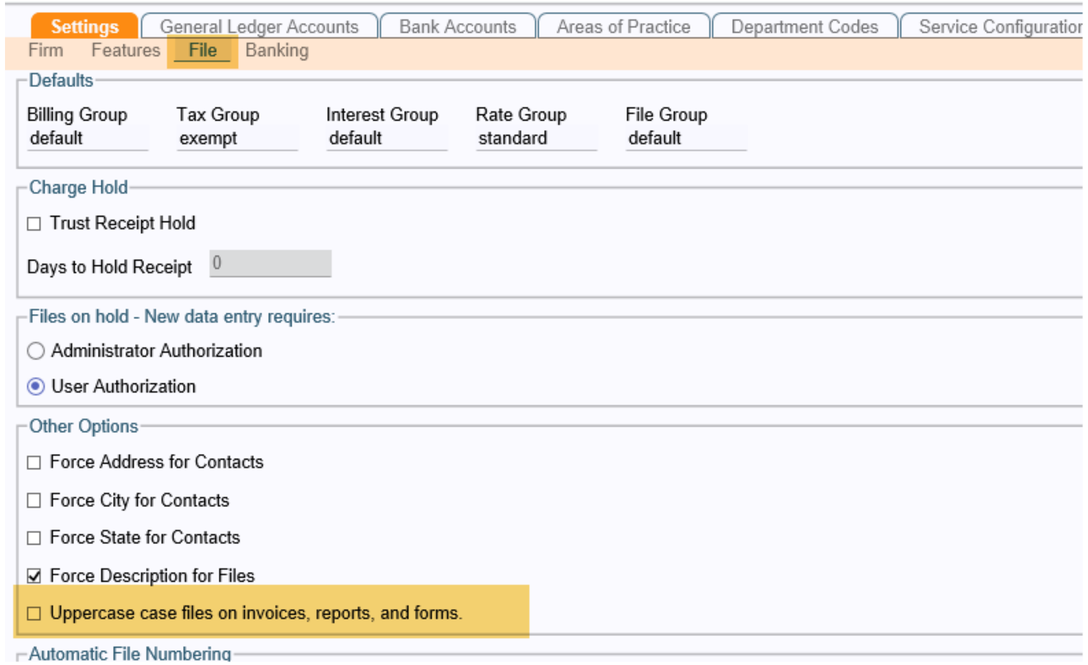
- Lead and assigned attorney shown in top banner of File Manager
- New icons allow the file address to be:
  - copied to clipboard
  - opened in a map locator



CLIENT/MATTER:

File Number Display

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



Data Entry

Time entry worked vs. billed

Keyboard shortcuts

Trust Transfers

Multiple check layouts

Bank-required activity files

Payables

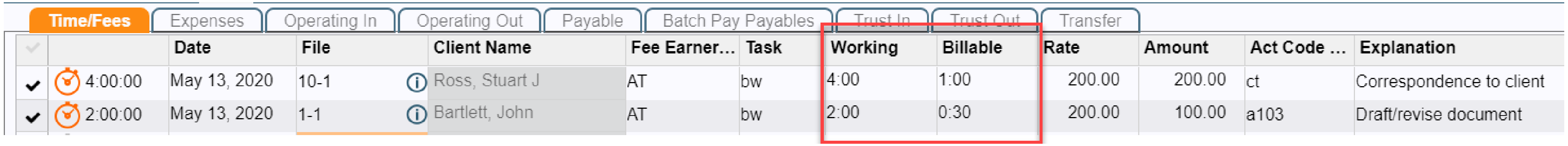
Check requests

Tax allocations

3 decimal expense rate

DATA ENTRY:

Time Entry Worked vs. Billed



		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

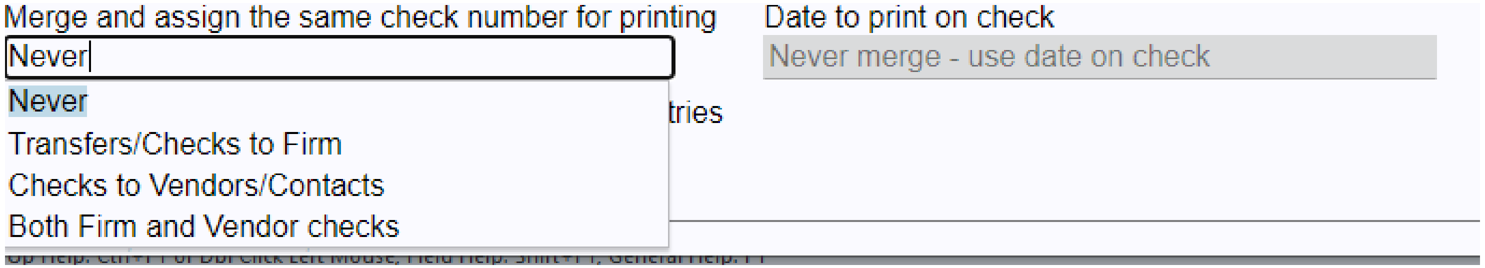
Trust Transfers

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

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

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

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:

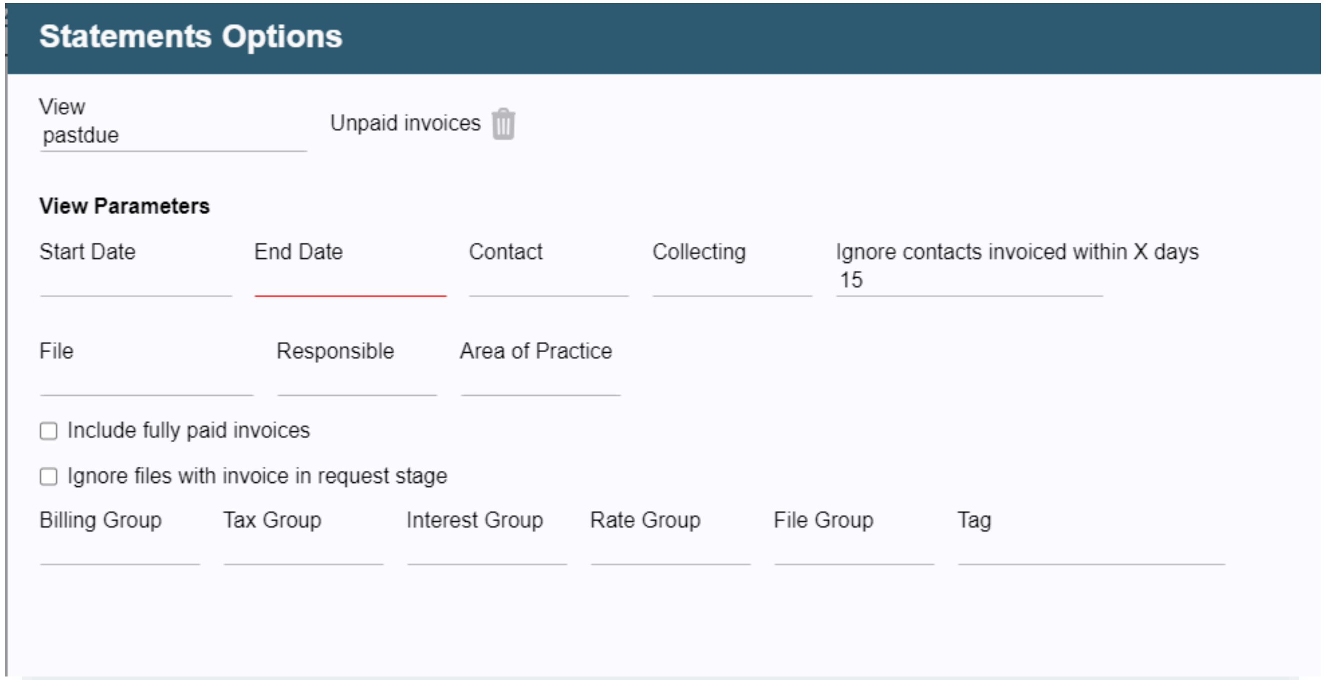
Flat Fee

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

BILLING:

Past-Due Statements

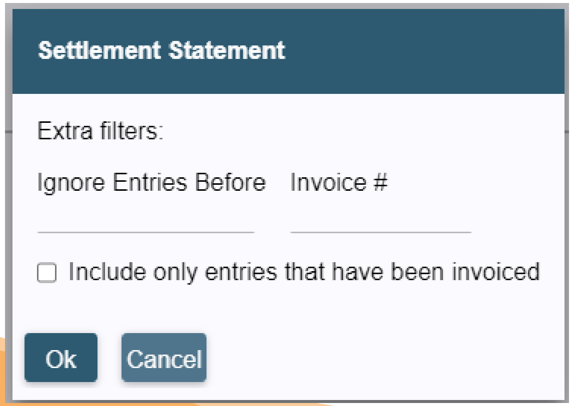
- Ability to specify a start date when running statements.



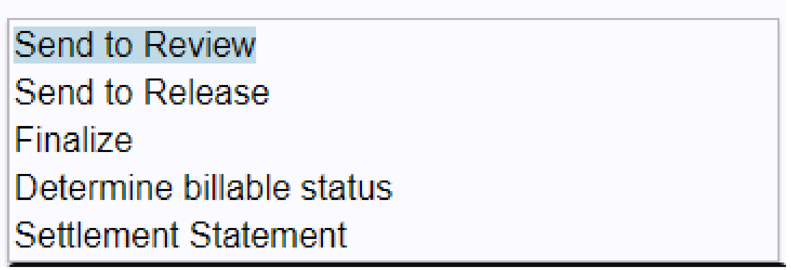
BILLING:

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**.

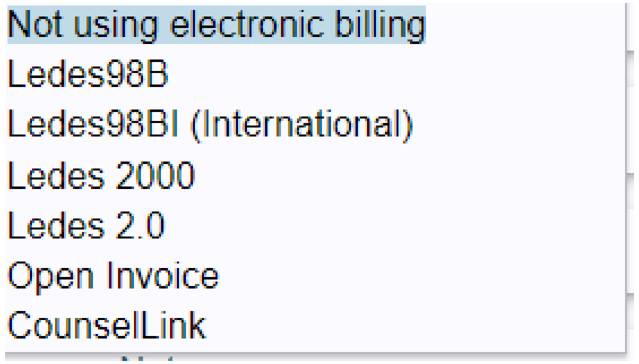


- Settlement statement with dating
    - Billing → Request Invoice → Enter file number → select option for Settlement Statement

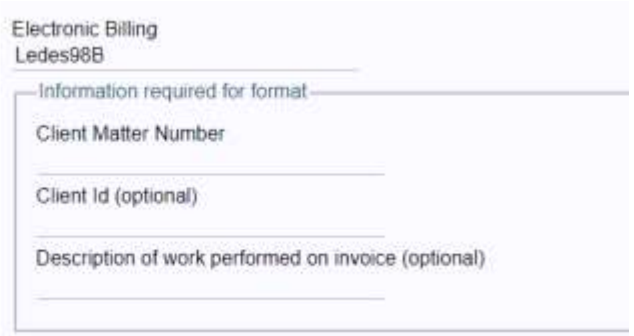


eBilling

- New eBilling formats:
  - CounseLink
  - Open Invoice



- Ability to specify client number



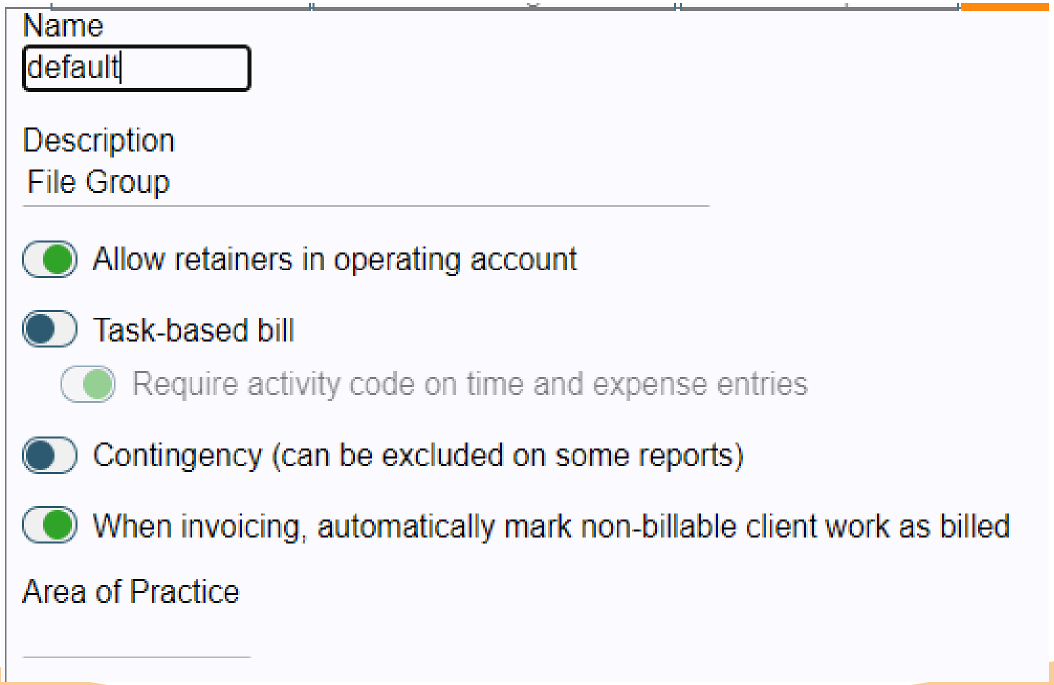
Invoice Templates

- 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



BILLING:

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

ACCOUNTING:

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:

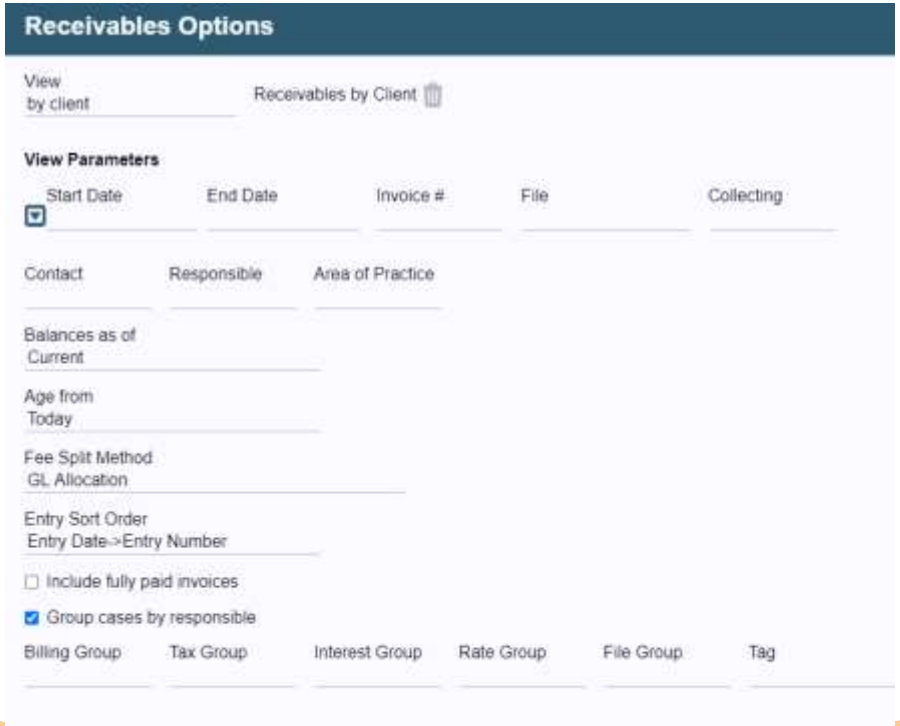
New Productivity Reports

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

Receivable Report by Client

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



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

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

INTEGRATIONS:

Microsoft Office 365®

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

soluno®

Thank you for joining us

