

Beyond Management LLC

Computer and Management Consulting

Product Alert

SPLIT BILLING COMES TOGETHER FOR TIMESLIPS AND PCLAW

By Neil Quateman

■ For years our clients have been clamoring for the ability to split their bills. They ask: *"How can I enter my time and expenses in one place and then split the charges and send the billing to different clients, one for 20% and one for 80%? Do I have to photocopy the bills and make adjustments in the software? Or do I print them to Word or WordPerfect?"*

In the past, perhaps, but not anymore. Our favorite billing systems, Timeslips and PCLaw, can now offer you very capable split billing features. This will **save** firms a tremendous amount of administrative time and **increase** the accuracy and management capability when dividing the same charges among multiple clients.

In both programs you identify an initial client/matter that will receive time and expense entries. The next step is to identify the other client/matters that will receive a percentage of those charges.

At billing time, separate bills will be created for each

matter, separate account receivable balances will be established for each matter, and when payments are received, they will be applied separately to each matter. Life is good!

Here are some split billing highlights for both products:

◆ Timeslips allows you to split time charges at one percentage rate and expense charges at a different percentage rate for each client.

◆ PCLaw's invoices (called "templates") can have a different look for each of the clients being billed.

◆ Timeslips can display a table on the invoice showing the split percentages and amounts being billed to each client.

◆ Timeslips offers reports to help you look back at the split billing activity.

◆ PCLaw allows you to create a new matter while you're setting up the split percentages.

So, for all of you out there who've been asking for the easiest way to split your billing, it's here! Give us a call if you want more info. ■

Mini Alerts

- This year Sage will be releasing Timeslips BackOffice, featuring a full-fledged integration capability with general ledger accounting.
- Timeslips v10.5 has the very important Service Release 1 available on its Web site.
- Time Matters is now shipping version 4 with enhanced document management and an integration with Lexis-Nexis.
- Amicus Attorney is shipping version 5, with its new CommCenter and a research and docketing module.
- PCLaw is shipping version 5.5, which now comes with contact management and a calendar module. Also coming soon is the PCLaw client/server version using Microsoft SQL for larger databases.

Look Inside For A Special Flier
About Our Training Facility!

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New Staff

INTRODUCING...OUR NEW ADMINISTRATIVE ASSISTANT, ISABEL PAGE

by Neil Quateman

■ Have you called the Beyond Management office since January from 8 a.m. to 2 p.m.? If so, you have probably talked to Isabel Page, our new part-time Administrative Assistant.

"I hired Isabel because of her extensive work experience dealing with people who call in and her willingness to learn our business," reports Neil. "She's friendly, she has a very even-keeled personality - and she's efficient."

In fact, efficiency is one of Isabel's favorite things. *"I enjoy the way the office is extremely organized,"* she admits and adds, smiling, *"I'm not as compulsive as Neil, but I'm not far behind."*

And that's good for the company, because Isabel is the person you get when you dial "0" in voice mail, she's the one who tracks down the consultants when they're needed, and she handles the class enrollments, the software orders and the initial inquiries.

That's quite a variety of duties, but Isabel is someone who *"likes to be working the whole time. I don't like to sit at a job and watch the clock."*

After ten years as operations manager for a large Southern California-based real estate company, Isabel has honed her customer relations' skills as well.

"I enjoy the way the people in this office try to see what they can do internally to better serve their clients. Every week we discuss what we can do to make it



easier for clients to come to us and for us to help them."

Isabel can even hold her own when all the computer lingo starts to fly around the office – because she hears it at home! Her husband, Bill, has over 20 years experience working with online banking for Citigroup.

Speaking of languages, people often wonder about the origin of Isabel's charming accent. Would you believe Filipino Texan?

"I was born and raised in the Philippines, my Mother is German-Filipino, my father Spanish-Portuguese, and I lived in Texas for about ten years. It takes a long time to get rid of that drawl."

As it happens, Sonny Virmani was also raised in the Philippines and he and Isabel often compare notes about their childhoods there. Isabel adds, *"I like the way our office is ethnically diverse. It lends itself to how the company operates, understanding different needs."*

When asked what she does to relax, Isabel answers with a straight face, *"I have children, I have no hobbies."* One son, Tim, is 26 and in college while son Nicholas is a healthy, active

9-year-old.

Luckily for her family and her work, Isabel is organized and ready for anything. *"All these programs we handle at Beyond Management are geared toward things being efficient. That,"* she declares, *"appeals to my nature" ■*

Where's Joanne?

Yes, you still hear her voice on our voice mail, but unfortunately for us, she's not around as often as she used to be.

Joanne Baker had such a good time teaching our Timeslips classes, she made a decision that she wanted to teach full-time. And that's exactly what she's doing.

Joanne is now teaching QuickBooks seminars for Real World Training, the only company officially endorsed by Intuit, the makers of QuickBooks. (Check out www.realworldtraining.com for a current schedule.)

Since these seminars are taught all over the United States, it might be a while before we can lure Joanne back to Century City to teach one of our Timeslips classes. However, since both she and Neil would like that very much - it's not goodbye, Joanne, only *au revoir*.

We wish her well.

The Automated Office

LINK 'EM AND SYNC 'EM:

THE PROS AND CONS OF CONNECTING YOUR SOFTWARE

By Sonny Virmani

■ Our clients have been asking, "Why can't we link our different software packages and synchronize them so we don't have to enter information more than once?"

Since this is a perfectly reasonable request and a logical computer function, the software industry has been working to improve the linking capabilities in their packages.

Generally, these are the areas of software that are being linked: **Billing, Accounting, Case Management** (Calendaring/Document Management/E-mail) and **Personal Digital Assistants (PDA)**.

To a non-techie, linking software may sound like a fairly simple thing to do. Not always! The end result offers many advantages, but getting there has its complexities. Thus, we want to list the pros *and* cons that firms need to consider when they contemplate linking and synchronizing their office software.

The key to all this is in the **planning**. A firm must decide what areas they want to integrate, and then integrate at a pace that is comfortable.

Neil Quateman agrees. *"It's important that our clients who are interested in going down this path understand the planning required and the challenges they face."*

"The technology used to open up software programs so they can be linked with others is a developing dynamic. Thus, the ease in which programs can link together is evolving with each version as the products improve."

"That means there are choices to be made about a software's features and its linking characteristics, since each product 'behaves' differently in the linking process."

Ultimately, the question becomes what features do you need in your practice from your software, and when you link them, what can you expect from the linking elements?

Beyond Management's goal in working with software integration is to help our clients make choices that are a "best fit" for their practice. ■

Pros

1. **Increases Efficiency**
 - Fewer resources are needed to input, process and retrieve data
2. **Reduces Redundancy** (spelled M-I-S-T-A-K-E-S)
3. **Increases Data Accessibility & Reliability**
 - Enter and access data more easily and from fewer areas
 - Respond to internal and client needs more quickly
4. **Reduces Learning Curves & Training Time**
 - Learn fewer systems, since one entry goes into multiple programs
5. **Strengthens Security**
 - Centralization allows different information access for different passwords

Cons

1. **Cost Varies**
 - Each firm's systems and needs are different, requiring individualized analysis and estimates
2. **Transition to Integration Can Be Complex**
 - Linking requires a commitment to the project and plenty of preparation
 - You have to clean up your systems before linking can be done (garbage in, garbage out!)
3. **Training & Transition Time is Needed**
 - Everyone may be learning a new way to enter and track data

THOMAS PAVONE OF PAVONE & COHEN ON THE LINKING & SYNCING EXPERIENCE

■ Pavone & Cohen is a highly regarded law firm dedicated to representing employers in labor and employment matters. This three attorney office in Encino, California recently worked with Sonny Virmani to link their software systems. Here are some comments from Thomas Pavone about the process and the results:

"Previously, we had stand-alone items with a calendar system that operated on one computer only. Since the attorneys were using

separate computer systems, everything had to be entered in twice, often leading to errors. We also had a stand-alone billing system so none of it was effectively connected.

What we have now, using Time Matters and PCLaw, does a good job of linking our contacts and client database to our billing and accounting so we have a fairly complete system. We can establish a new client into the system, record our time, account for client funds

and costs related to client matters – all very effectively. Sonny has also linked our contact database and billing to our Palms, a very important thing.

I must say, though, that this process does require a great deal of tweaking and time spent to customize it. We had instances of Sonny spending time with the software vendors just to get the basics operating correctly. Still, this is yards and yards ahead of where we were before." ■