Blue Tuesday Ltd

Newsletter

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Hello again and welcome to our latest newsletter.

Please keep your comments and suggestions coming in, we like to hear from you. Thanks.

Zoho Assist

As most people know, we use Zoho Assist to log on to your screens, or to share ours.

A recent upgrade has meant that quite a few people are reporting that the icon isn't letting them on, saying the session has expired.

You can download a new portal through our website, www.bluetuesday.co.uk. Go to the Downloads section, scroll down to Zoho Client and click on the words. You may need to tell it to download or run, but please do get in touch if you're having problems, and we can help.

We tend to put the icon near your Blue Tuesday icon (it makes it easier to find when you need us), so drag and drop it into place to move it.

Angela

Angela is taking a well-deserved break (her words) and will be having the first two weeks of October off. Because she's the first point of contact for most people, we'd like to ask that if you need us during her holiday, please email and David or John will respond. A phone answering service will take calls and pass on messages via email, so it's quicker for you to email! support@bluetuesday.co.uk Thanks.

Three Way Reconciliation

The proposed changes to the SRA Rules mean that at least every five weeks you will need to complete a reconciliation of all client monies held or operated by you with the cash book balance and the client ledger total (i.e., a three way bank reconciliation).

The bank reconciliations must be signed off the by COFA or a manager of the firm and any differences or reasons will need to be promptly investigated.

This means you'll need a report proving that your cash book agrees with your bank statement, give or take uncleared items, and they both agree with your matter balances list for both client and deposit monies.

We're working on incorporating this report into the system, but if you haven't already got the three way reconciliation in place, have a word with Angela and she can sort out a spreadsheet (or written) format to make the task easier and to help you get into the habit of doing it.

Hints, Tips & Other News

∗ Would you prefer a default nominal to be a different one to the one the system chooses? As in, perhaps, a different bank account when going into posting routines? Ask us and we can change the default number for you.

∗ Use the Tab key to move down to the next box while posting. Much quicker!

∗ To search for, for example, the next UFN number, put the start of it (e.g., 010918) in the matter search box and change the search criteria to all matters. Anything with that date (or string of characters) in the matter description will be listed along with the 001 suffix so you can see what's the next available number.

∗ The current licence expiry date is 1st October, which did seem a long way off but now is definitely not! We will be getting in touch with all users shortly, probably the middle two weeks of September, to do an update full of exciting new things and with an extended licence expiry date.

∗ If you try to contact us out of normal hours and we don't pick up the phone within about 3 rings, it means nobody is in the office. Instead of leaving a message, try emailing us. Thanks to modern technology, we can often get emails on mobile devices which can mean a quicker response as we can't pick up phone messages until we're next in the office but might be able to see your email and get back to you well before then.

What are Data Fields and Standard Tasks?

Data Fields (in the Admin Menu) are bits of information related to each matter which you might want to keep, or later to import into documents or forms. They can be used as a supplement to and/or instead of the notes boxes on a matter, and the details can be changed or added to as and when necessary.

See below for how else they can be useful.*

When you select a matter in the Matters tab, you will have 5 tabs — List, Matter, Matter Detail, Matter Tasks and Document History. The data fields you create will dictate what information you see in the Matter Details page.

Each worktype (set up or altered within References in the Admin menu) can be allocated relevant data fields such as, for example, Other Solicitor, Estate Agent, Lender, and Land Registry details, sale price, completion date, other side's reference, LR Title number and so on for a conveyancing matter. Or universal details such as archive location and destroy date.

Each data field will need a code, and the list will always be shown in code number order. Using codes 10, 20, 30 and so on will mean you can slot something in between existing entries later if need be. We have also found that using the same code for information which is common to all worktypes can be helpful, especially for tasks which are common to different worktypes, such as our reference, other side's reference, client's new address etc.

Data Fields need to be allocated a type; choose between contact, currency, date, number, text or yes/no.

All except Contacts are one-off pieces of information relevant only to that matter which can be stored within the database for as long as you retain the matter details. Contact information will be retained so that it can be found and used in other matters. This would be useful for, for instance, Other Solicitor, Lender, Estate Agent or Land Registry, where the other party may well be an organisation that you often deal with.

Because data fields can be filled in at any stage of a matter, the fields don't have to be information which is to hand when the matter is opened. In a PI or medical negligence case, you won't know the settlement figure until almost the end of the matter, but if there's a data field for that information, and it's completed when the figure is known, it'll be there on record. Or a completion date for a conveyancing matter, the net Estate value on a probate file, the storage location of a Will and so on.

* Professional Indemnity Insurance renewal forms increasingly ask for other information on files, things which you may not record and which prove difficult to find twelve months later when the renewal questionnaire needs completing. If you are aware of what you'll be asked to provide, why not set up a data field for it, so that you can search the records in future and provide accurate information as well as saving time.

Standard Tasks (also in the Admin menu) is the structure of a case, but it could be used even if you don't want to use a case management system. They show as Matter Tasks when a matter is selected. Set up an attendance note or a miscellaneous letter to client and see how they can help speed up work. As with the data fields, we suggest using 10, 20, 30 etc. as the code for each task, and the list will come out in the numerical sequence of the codes.

The category box isn't essential, but can be used to help to show the structure of a case. For instance, on conveyancing, you may have initial (covering terms of business, client care letter etc.), pre exchange, on exchange, after exchange, on completion and post completion.

The description should be a simple description of the activity that task will perform, like Attendance Note, Client Care Letter, Terms of Business.

The Document box needs to be the name of the relevant document which that particular task will generate, for example Client Care Letter or Mortgage Information Sheet. These documents will contain merge fields which will populate when the document is opened through Matter Tasks (available when a matter is selected through the Matters tab), and should mean that the document is ready for printing, for a standard document, or to have some or all content entered for a miscellaneous letter or attendance note. Any generated document can be edited as necessary.

Ask us for help on this if you'd like to set up this time-saving feature.