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WHAT'S NEW IN KEYHOUSE

END USER INTERFACE

VERSION 5.7.1.1

We are constantly improving and implementing new features in our software. The attached guide is a summary of what has been added and improved in our system. This guide has been designed as a quick way to see all the changes with your latest upgrade.

We have made improvements in the following areas:

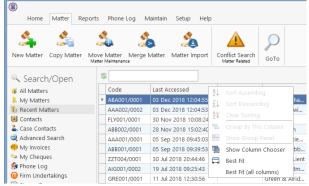
Area	Code	Description
Search Screens	001	Case Status visible on Recent Matters Search Grid
	002	Custom Views
Current Client Details	003	Re-sequence Case Associates
Current Case Details	004	Increased Field Size for REF1, REF2 and REF3
	005	Default Destroy Date
Case Diary	006	Increased Tooltip Duration on Workflow
	007	Time Out Warning on Large Documents
	008	New PDF Preview Controls
Extra Case Details	009	Spell Check for Extra Case Details
	010	Case Import – UDF Default Values
Associates	011	Warning re Modifying Case Associates
	012	Link Case Associates
	013	Extra Details for Associates (AUD)
Scan Capture	014	Convert to PDF
	015	New Data Structure for Capturing Documents
Account Ledger	016	Running Balances on Account Ledger
	017	Outlay Codes visible on Account Ledger
	018	Add Narratives to Cheque Requisition
	019	Cheque Requisition can use Logged in Handler
	020	Invoice Details visible when creating Credit Notes
Time Ledger	021	Cumulative Charge
Strong Room	022	Final Receipt Box
	023	Select All Document Option
	024	Select All Associates Option
	025	Progress Bar
	026	Warning when Associate Type not Available
	027	Column Width for Follow On Action Increased
My Overview	028	Draft Invoice Drill Down
Outlook	029	Open Case Documents from Outlook
Word	030	Save as PDF
Personal Settings	031	View to Revert to Default

Search Screen

OO1CASE STATUS VISIBLEON RECENT MATTERSSEARCH GRID

he Case Status for matter is now searchable on the Recent Matters Screen.

• Right click on the Header Row on the Recent Matter Search.



- Click on Show Column Chooser
- Select Case Status from the list

Column Chooser	×
Address	^
Case Status	
Close Date	
Closed	
Email	
File Number	
id	
Old Ref	~

• Drag and drop it into position on the Header Row.

Home Matter Rep	orts Phone Log I	utaintain Setup Help			Keyhouse Matter Manage	ment (88 - Reta	a Brennan - 000	o/seae)
🐴 🝰	4 3	5 🍰		P				
New Matter Copy Matter	Move Matter Merge Mater Maintenance	Matter Matter import	Conflict Search Matter Related	GoTo				
Search/Open	8							
All Matters	Code	Last Accessed	File Colour	Name	Description	Case Status	F/e Code	Fee Earner
My Matters	ABA001/0001	03 Dec 2018 12:04:55		David Abraha	Family Law	Select Package	AM	Anne Mellon
La Recent Matters	AAA002/0002	03 Dec 2018 12:04:53		AAA Worldwi	Student Complaint EF	N/a	BS	Brian Sween
Contacts	FLY001/0001	30 Nov 2018 10:08:24		Jack Flynn	Road Traffic Accident at Junction 9 on M	Undertaking t	CN	Carol Nolan
Case Contacts	A88002/0001	28 Nov 2018 15:02:40		Abbie Lynch	Commercial Lease - 5 Main Street, Donn	N/a	SK	Stephen Ke.
Advanced Search	AAA001/0001	05 Sep 2018 09:45:03		AAA Securitie	Landlord Dispute	Instructions re	MW	Martina Win
😎 My Invoices	ABE001/0001	05 Sep 2018 09:39:53		George J Abb	Sale 45 Somserset Road, Dublin 6	Initial Letter	85	Brian Sween
My Cheques	ZZT004/0001	30 Jul 2018 20:44:46		New test CLient	test	N/a	BS	Brian Sween
🔄 Phone Log	AJG001/0002	19 Jul 2018 09:25:43		Allied Investm	Garry Barlow -v- Hired Talent Services	Proceedings i	85	Brian Sween
Firm Undertakings	GRE001/0001	11 Jul 2018 12:30:56		Green & Alrid	John Flint -v- Sam Hume	Not Applicable	JP	Justin Phelan
Strong Room	A88001/0002	04 Jul 2018 10:12:46		George J Abb	Matter merged with ABB001/0001	N/a	85	Brian Sween.

• Enter the search criteria to proceed.

002 CUSTOM VIEWS

Custom View may be created by the System Supervisor. They are visible on the Search Open Screen. The information contained on these views can be exported to Excel for reporting purposes.

- On the Search/Open screen click on My View
- Select the required view from the drop down list



- Click the Refresh Button to see the details
- To limit the view, enter a search criteria
- Click Export to Excel to create a report



- Save the report with the desired name and location.
- Enable the content.
 Control of the content of the content
- Modify the report as required

Current Client Details



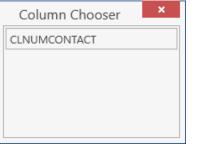
When client contacts are added to a matter, they are assigned a sequence number. The last contact entered will have the highest sequence number. It may, on occasion, be necessary to reorder the contacts and sequence numbers.

• Open the Current Client Details and click to the Client Contacts Tab

• Right click on the Header Row and select Show Column Chooser from the list.

)						Curre	ent C	lient Details						
Coc	de WAL	002					Clie	nt Name	Walk	ter & Green				
							Env	elope Name	Ente	r envelope na	me			
Corp	porate		Persona	I	Legal	Details		Billing Detail:	5	Permis	sion	Bank Deta	ils	
3en	General Client Contacts Notes					Notes		Matters		Cross F	ef	Categories		
Se	earch											Standard \	view	
	Initials	Full N	ame	Home P	hone	Work Phone		Mobile		First Name	Surname	Salut	tation	
Þ		John	Walker				ĝ↓	Sort Ascend	ling	er		Mr V	Valker	^
			Green				Z↓	Sort Descer	nding		Green	Mr G		
		Karen	Gibson				A ¥				Gibson	Ms G	libson	
							8	Group By T	his Co	olumn				
							-	Show Grou	p Pan	el				
							間	Show Colur	nn Cl	nooser				
							₽	Best Fit						
								Best Fit (all	colur	nns)				
							٣	Filter Editor						
														Y
	٢									Inse	t Ch	ange C	> Delete	
												ок	Cance	2

• From the Chooser List, select CLNUMCONTACT and drag to the Header Row.



- Right click on the Contact to be resequenced
- Use the Move options to reposition the contact

Code WA	L002					Client Name	Walker	& Green			
						Envelope Name	Enter e	nvelope nam	e		
Corporate		Personal		Legal	Details	Billing Detail	s	Permissio	on I	Bank Details	
General		Client Co	ntacts		Notes	Matters		Cross Ref	(Categories	
Search									5	Standard View	1
Initials	Full 1	Name	CLNUM	CONT	Home Phone	Work Phone	Mo	bile	First Name	Surname	Т
	John	Walker		1					John Walker		1
		n Green		2					Hugh	Green	
۶.	Kare	n Gibson		a 🕂		_			Karen	Gibson	
					ange lete ail						
				T Mo	ove to Top						
				🕇 Mo	ove Up						
				🐥 Mo	ove Down						
				🛃 Mo	ove to Bottom						
<											>
								Insert	Chang	e Delet	e
									0		

Click OK to confirm.

Current Case Details



he field size for the above has been increased to 100 characters.



When closing a matter, the destroy date can be populated automatically for a specified period of time. This feature must be activated by the System Administrator before it can be used. Please note that the period for destruction will standard across all matter types.

- Close the file in the normal way without entering a destroy date.
- The system will automatically enter the destroy date based on the system setting

0				Cu	rrent Case Detail				
Client Code Matter		Descriptio	on * Corpora	ate					
Matter Ac	dmin Additio	nal Details	Associates	Archive	Billing Details	Permission	Transaction	Linked Cases	
Closed date	07 Mar 2019	Closed							
Date File Cl		7 Mar 2019							
Location					•	1			
Archive Loc	ation								
File Barcode	e No								
Box Barcod	e No								
Box Numbe	er 🗌								
Expected D	estroy Date 0	7 Mar 2026]			
Actual Dest	roy Date	ease select o	iate			•]			
Destroyed b	y s	elect Fee Ear	ner			•			
ile No. 176								ОК	Cano

• This can be overwritten by entering a date in the Expected Destroy Date before ticking the Closed box as the retention period for files varies from matter to matter.

)			Cu	rrent Case Detail	5			>
Client Code WAL002 Matter 0001	Description	on * Corpora	ite					
Matter Admin Addi	tional Details	Associates	Archive	Billing Details	Permission	Transaction	Linked Cases	
Closed date 07 Mar 201	9 🗹 Closed							
Date File Closed	07 Mar 2019							
Location								
Archive Location								
File Barcode No								
Box Barcode No								
Box Number								
Expected Destroy Date	07 Jun 2030			•	•			
Actual Destroy Date	Please select (date			-			
Destroyed by	Select Fee Ear	ner						
ile No 176							OK	Cancel

Case Diary



When using the tooltip on the Workflow, it will now remain visible for longer.

ase: WAL002/00	01	er & Gree orate	n			
WARNING : Time	to recheck the Anti Money Launde	ring for tl	nis Clier	nt.		
Action	Q #	Sear	ch			
Circuit Court Litig	ation 🗸				Date	Time
Brief Counsel to	settle Circuit Court Proceeding 🛆	<			15 Oct 2010	00:00
Check whether d	raft Proceedings received	S			09 Oct 2010	00:00
Prepare docume	nts to Issue Proceedings					
Client swears Aff	Double click the select action to p	process th	ne follo	wing		
Issue Proceeding	Action Code: CCL03		ic rono	mig		
Serve Proceedin	Prepare documents to Issue Proc	eedings				
Check whether A	Associated document to generate	e:				
Take Client's Inst	Personal Injuries Summons Affidavit of Verification					
Send Replies to	Letter to Client encl draft Proceed	dings				
Check whether D	Associated action to process:					
Brief Counsel re	Client swears Affidavit of Verificat	tion				



When trying to preview large documents that the system is struggling to display, the

warning message has been changed. The warning will appear in the Preview Pane.

Cannot preview this Document

Please Note: This document cannot be Previewed.

Possible reasons:

- The document may have been deleted
- The document may take too long to process
- The system is still processing this document

Please try again later

Document: \\khlpt08\Keyhouse Training \keyhouse\client documents\BLA001\0001 \Chase Letter to Doctor_617.DOC



<u>New PDF Preview</u> <u>Controls</u>

When previewing PDF documents in the Case Diary, Document Manager or Scan Capture, additional controls have been added to improve the Previewer

V	Brief	🥠 I	i 🔶 🗖	ņ
		85 🗜 🖿 gation ttons		,
	Author: Jiby Jacou			
No	Brief for test SECTION A - ONe new session	Date	Roma Ma	
No.	Brief for test	Date	Page No	
No.	Brief for fest SECTION A - ONe new session Description		Page No	
	Brief for test SECTION A - ONe new session	22 Sep 2015	Page No	
1	Brief for test SECTION A - ONe new session Option 000002255		1	
1 2	Brief for test SECTION A - OHe new session 000000295 Section 65 Letter	22 Sep 2015 22 Sep 2015	1 26	
1 2 3	Brief for test SECTION A - Ofe new session 000000235 Section 68 Letter 00000016	22 Sop 2015 22 Sop 2015 23 Sep 2015	1 26 28	
1 2 3 4	Brief for test SECTION A - Ote new session 000000295 Section 65 Letter 000000216 000000214	22 Sop 2015 22 Sop 2015 23 Sep 2015 23 Sep 2015 23 Sep 2015	1 26 28 29	
1 2 3 4 5	Brief for fest SECTION A - OHe new session Description 000000295 Section 84 Lener 00000014 PV- adding betwee to uplead	22 Sop 2015 22 Sop 2015 23 Sep 2015 23 Sep 2015 23 Sep 2015 06 Apr 2016	1 28 28 29 30	
1 2 3 4 5 8	Brief for test SECTION A - Oke new session 000000235 Sardina 68 Latter 00000016 PWL addrig between to upload test	22 Sop 2015 22 Sop 2015 23 Sop 2015 23 Sop 2015 23 Sop 2015 06 Apr 2016 15 Jul 2016	1 26 29 30 31	

Extra Case Details

009 <u>SPELL CHECK FOR</u> <u>EXTRA CASE DETAIL</u>

With text Extra Case Details Fields where the field size is greater than 50 characters, a spell checker has been added.

١	Maintain Other Case Details	×
General	Properties	_
BLA001	/0001 Gordon T. Black	
Miles er	RTA Walkinstown Crossroads, G. Black ave the instructions for the uasage of the machine	
who ga	ave the instructions for the dasage of the machine	- 1
Instru	tions were issued by Line Maneger	
	OK Cance	
		۶



f a UDF field has a default value, the value will now be added to the matters as they are imported to the system.

Associates

011 WARNING RE MODIFYING CASE ASSOCIATES

When an associate is linked to more than one matter, changes made to the associate may impact on all other matters linked to the associate. A warning will appear when a change has been made to an associate when it is linked to more than one matter. It will also automatically log the change and who made it.

- Open a Matter and click to the Associate Screen.
- Open the Associate, make the change and click OK
- The following dialog box will appear

		ed to Cases
	te is linked to other	Cases. Any changes you make will be k OK to save the changes.
Case	Name	Description
AAA002/0001	AAA Worldwide Removals	Derek Bradley - export to USA Freight
ABB002/0001	Abbie Lynch	Commercial Lease - 5 Main Street, Do
BUN001/0001	Kenneth Bunson Associates	Compliant re James Magee
DOH001/0004	Frank Doherty	Claim v Advance Automobiles
	Ok Return to	editing Cancel

- Click OK to save the change
- Click Return to editing to make further changes and click Cancel to leave without applying the change.



Where a link between associates exist, this link can now be set up in Keyhouse. There are 2 fields where the information can be stored.

- Open the Matter and select Associates
- Open the Associate to be linked e.g. Defendant.
- In the Specific Information for Case section, click on Our Code on the Other Side Details and/or Insurance Details.



• Click on the Browse Button to go to the Associates List.

		S	earch			Incl	ude Ref	ired Star	ndard View
			Code	Name/Com	Address	Phon	Categ	Notes	Туре
Associate Type	0		000	Sexton Ke	Walkinstown Ro	450			SOLL.
ALL	î			oenton nem		100111			000
Accountants			904	E. P. Daly	23/24 Lower Do				SOLI.
Actuary			904	Michael B	James Street We				SOLI
Agents		-							
Architects			904	Daly Lync	The Corn Excha				SOLI
Attorney			904	test1					SOLI.
Auctioneers			904	Sexton Ke	Dundrom Dubli				SOLL
Banks		-							
Barristers			904	Bloggs &					SOLI.
BBSSC Contacts			AB	Abercorn	Solicitors 38 Pe				SOLI.

• :	Select the Type and the Associate
-----	-----------------------------------

- Other Side Details
 Insurance Details

 Our Code
 \$904451
 Our Code

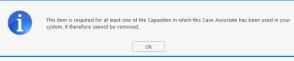
 Bioggs & Co
 Bioggs & Co
 Stephen

 Other Reference
 Enter reference
 Insurance Reference
- Click OK to close.

O13
KEYD-5645**EXTRA DETAILS FOR**
ASSOCIATES (AUD)

U p until now it was only possible to have extra details for matters. Extra details can now be added for associates. These fields will be set up by the System Administrator and are located on the Extra Details screen. If the AUD has been set at the Associate Level, it will appear automatically on the matter and cannot be deleted.

- Open the Associate on the Case
- Click to the Extra Details Tab
- Required fields will appear automatically
 Concentration of the data o
- If the user tries to delete the field, the following message appears.



 To Add Additional fields, click on the Insert button

Concernance Contact Details Other Details Other Types Notes Other Case Involvements Back Details Extra Details

Click the Insert Button

lick	into the F	ield box		
Ì		Add Associate Other Detail		3
Select	a field from the dropo	ldown		
Field	Date of demand			~
	_			
				Cancel
	Category	Field		
		Contract description	^	
) E	Date of demand		

• Select from the fields available and click OK

• Double click on the field to open

٦		Maintain Associate Other Detail	×
General	Properties		
Associat	te Code:	904376	
Name:		Donnybrook	
Туре:		Lending Institution	
Case Co	de:	FLY001/0001	
Associa	te Sequence:	1	
Date of	fdemand		
þ4 Fe	b 2019	S	•
		ОК Сан	cel

Enter the information and click OK

D						Edit Cas	e Associate				
General	Associat	e Contac	t Details	Other Details	Other Types	Notes	Other Case Involvements	Bank Details	Extra Details		
+ Insert	Change	X Delete									
Group			Detail				Value				
			Facility				Term Loan				-
			Facility lette	irs							
•			Date of den	nand							
										Ok	Cance

Click OK.

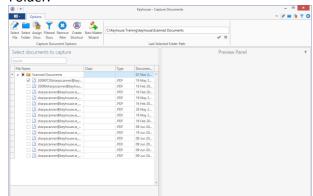
Scan Capture



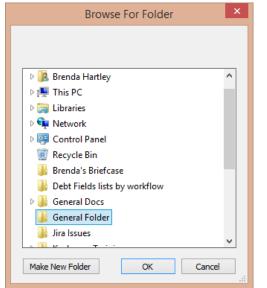
CONVERT TO PDF

When using the Capture option to add existing documents to a matter, there is now an option to Convert to PDF rather than assigning it in in Word or Excel format.

• Open the Capture window and click on Select Folder.



• Navigate to the folder where the documents are located and click OK.



- Tick the documents to be assigned to the matter and click Assign Docs.
- Set the fields, ensuring you change the Action Code to reflect that the documents are not Scanned post.
- Tick Convert captured documents to PDF



• Click OK.

015 KEYD-5368 NEW DATE STRUCTURE FOR CAPTURING DOCUMENTS

Currently documents can either be saved in using the File Date (date scanned) or the date can be set manually to reflect the date on the document. A third option has been added to use the file date as the document date. This will allow the users to set the date of the document and record the date the document was scanned to the system.

- Open the Capture window.
- Select the document to be capture and rename it.
- Tick the box to indicate the document to be imported and then Assign Docs.

- Remove the tick from the Use file date as the Diary Date.
- Tick use the File Date as the Document Date.

	Assign checked documents to	Case/Matter – 🗖
Case/Matter	BL0001/0027 Joe Bloggs / 13 the avenue	
Handler	Brenda Hartley 🗸	
Action Code	POST Incoming Post	
Document Class	Client letters 🗸	
Diary Date	14/12/2018	s Diary date 🗹 Use file date as Document date
Diary Description		
	Note: Leave description blank to use document name as the description	
Capture Settings	Convert captured documents to PDF	ts to a single action
	Remove captured documents from original location	erated
	Set captured document as complete Retain selected s	ettings

- Check all other settings and click OK
- If importing more than one document to a single action where the dates of the documents differ, change the date of the document to the required date

	Capture Document Options oct documents to capture			Last Selected Folder Path	
	ct documents to capture				Preview Panel
	h				C:\Keyhouse Training\keyhouse\Manual\Scanned Documents
File	Name	Class	Type	Document Date	\20090720sharpscanner@keyhouse.ie.pdf
	Scanned History			23 Feb 2016	10
	Letter from Engineer		PDF	11 Dec 2018	
	Calification State Content Con		.PDF	06 Dec 2018	
	harpscanner-2237		PDF	18 Jun 2014	
	sharpscanner@keyhouse.ie_20090		.PDF	16 Feb 2015	Private & Coefficiential
	sharpscanner@keyhouse.ie_20090514		.PDF	19 May 2014	Mr. Brian Swomey Keyhonze Comparing Lid on Warder U yant
	sharpscanner@keyhouse.ie_201		PDF	16 Feb 2015	Main Street Bray Co. Wiekbrw
	sharpscanner@keyhouse.ie_20100		.PDF	29 May 2014	
	sharpscanner@keyhouse.ie_20120224		.PDF	19 May 2014	A positive approach this Christmas/New Year
	sharpscanner@keyhouse.ie_201209		.PDF	16 Feb 2015	Be optimistic and don't let warries about the reasonaic crisis apoll poor Christman haddeps Bin your.
	sharpscanner@keyhouse.ie_20120925		.PDF	09 Jun 2014	Ignore the more contained commentators - you can't do anything about the more economic elumines to there is an point in betting about 30
	sharpscanner@keyhouse.ie_20120926		.PDF	19 Jun 2014	However, technit your cana da in to make your business as least and robust as possible in 2009. This is very important as it's gring to be a very sliffered your.
					To help you do that I am sending you a report within by the Chrisman of Barthur, Jim Bildards, colled Binnephy Promphile Consent Orbit. Accelerate of both Barthur and Bill (J. 1 an help in reasonancing first area a part), affectived.
					In here is a short Artises Plan for Your
					 Real the report Real () again and much the bings you real it implement is your building in the
					margine with a pea. 5. Schedule a time to call meria the New Yoar to talk through over options.
					 Mondate a time is cell more as the Poine Your to call. Monaids near optimes. Hence a schemel and only republic Christman with your family and a New Your full of what Barack Offices a relate on the 'Audiotic of Waye'.

- Click Assign Docs
- Set the Diary Date to the date the documents were received and complete all the other required fields.

-	Sear			sit the Arti Mor	1						ignor Standard	-	
				Oute	Time	Handler	Simopsis				Action Co		
1				07 54p 2015	15:29	CN	Email To Shaun Dever - IBLA001/00011 Gordon T. Black				EM4	P	'n
ł				07 Sep 2015	15:33	ON	Email Frommo-reply@accounts.google.com - New sign-in from Chrome on Windows				EV4	P	
ł	5 Ø			13 Dec 2018	16/28	88	Letter from Doctor re Medical Report				022	P	
ł	۰ ا			17 Dec 2018	16:33	88	Letter from Solicitor with settlement Offer				622	P	
ł	5			18 Dec 2018	14:89		Cheque on 18 Dec 2018 - Pd Dr Bridget Hush				CH01	P	
4	5			18 Dec 2018	14.51	55	Cheque on 18 Dec 2018 - Pd Airtricity				CH01	P	
R	1 🔍			18 Dec 2018	1637		Letter from Engineer with Report				622		ŀ
	utaci	hmer	nts 🔤	arch .							Standard View		
	Туре	00						Version	Oute	Document Class			
				Report					05 Dec 2018	Reports			

• The Diary date has the received date, while the documents have the document date.

Account Ledger



Running balances can be added to the Account Ledger for the individual accounts.

- Open a Matter and navigate to the Account Ledger.
- On the Header Row, right click and select Show All Fields

Case: BLA001/0001		on T. Black Hilkinstown Crossroads, G. Black						Tel: 01 4766666 F/e: 8S
Search							Sta	indard View 📰
Date	+ Ref	Narrative	\$1	Sort Ascending	Billing A/c	Outlay A/c	Client Cur A	Deposit A/c
30 May 2010			7		0.00			0.00 ^
10 Jun 2010	1654	Lodged on a/c fees & vat			0.00	0.00	(1,210.00)	0.00
15 Mar 2010	2266	Pd PIAB			0.00	50.00	0.00	0.00
30 Mar 2010	pc	Pd Swearing fees	8	Group By This Column	0.00	24.00	0.00	0.00
24 Apr 2010	2390	Pd Dr Simon Young Medical Report	1	Show Group Panel	0.00	250.00	0.00	0.00
30 Apr 2010	pc	Pd Commissioner for Oaths		Show Column Chooser	0.00	55.00	0.00	0.00
12 May 2011	218	To Invoice 218	8		0.00	(50.00)	0.00	0.00
12 May 2011	218	To Invoice 218		Best Fit (all columns)	0.00	(24.00)	0.00	0.00
12 May 2011	218	To Invoice 218	Ŷ		0.00	(250.00)	0.00	0.00
				Filter Editor				

Select the field and drag to the Header Row
 Column Chooser

Cumulative Billing A/c	^
Cumulative Client Current A/c	
Cumulative Client Deposit A/c	
Cumulative Outlay A/c	
L_Reference	
Matter	
Outlay 🔺	
Outlay Code 🔺	~

- Repeat until all the required fields are on the Header Row.
- Save the View in the normal way

C	ase: BLAD01/0001	4)	Gordon T. Black RTA Walkinstown Crossroads, G. Black							Tel: 01 47666 F/e: BS
6	earch								Cumulati	ve Balances 🗍
	Date A	Ref	Narrative	Billing A/c	Cumulative Billing A/c	Outlay A/c	Cumulative Outlay A/c	Client Cur 🔺	Cumulative Client Current A/c	Peposit A/c
×	30 May 2010	1739	Lodged settlement agreed	0.00	0.00	0.00	0.00	(13,750.00)	(13,750.00)	0.00
	10 Jun 2010	1654	Lodged on a/c fees & vat	0.00	0.00	0.00	0.00	(1,210.00)	(14,960.00)	0.00
	15 Mar 2010	2266	Pd PIA8	0.00	0.00	50.00	50.00	0.00	(14,960.00)	0.00
	30 Mar 2010	pc	Pd Swearing fees	0.00	0.00	24.00	74.00	0.00	(14,960.00)	0.00
	24 Apr 2010	2390	Pd Dr Simon Young Medical Report	0.00	0.00	250.00	324.00	0.00	(14,960.00)	0.00



When Outlay codes are used when creating cheque requisitions, they can now be seen on the Account Ledger.

- Open the Account Ledger
- Right click on the Header Row and select Show Colum Chooser.

arch				
Date		•	Ref	
27 Feb 2015	21	Sort Ascen	ding	
27 Feb 2015	Z↓	Sort Desce	nding	
02 May 2012	2*	Clear Sorti	ng	
18 Apr 2012	8	Group By This Column		
26 Oct 2011	9	Show Grou	p Panel	
20 Oct 2011			nn Chooser	
20 Oct 2011				
12 May 2011	H-H			
12 May 2011		Best Fit (all		
12 May 2011	Y	Filter Edito	r	

- Select Outlay Code and drag to the Header Row.
- Select Outlay and drag to the Header Row

ISE: BLA001/0001			ordon T. Black TA Walkinstown Crossroads, G. Black						Tel: 01 47666 F/e: 85
sarch								Sta	ndard View
Date	Ŧ	Ref	Narrative	Outlay Code	Outlay	Billing A/c	Outlay A/c	Client Currer	Deposit A/c
27 Feb 2015		9546	Pd Airtricity	STD	Stamp Duty	0.00	4,210.00	0.00	0.00
27 Feb 2015		9512	Pd Dr Bridget Hush			0.00	500.00	0.00	0.00
02 May 2012		Ld	Lodged fees			(73,800.00)	0.00	0.00	0.00
18 Apr 2012		Inv 321	Invoice: Fees:60000 Outlay:0 VAT:13800			73,800.00	0.00	0.00	0.00
26 Oct 2011		1234545	Bill from Airtricity			0.00	106.61	0.00	0.00
20 Oct 2011		123456	Lodged part payment on a/c			(1,000.00)	0.00	0.00	0.00
20 Oct 2011		509818	Pd cLIENT			0.00	0.00	2.036.72	0.00

• The new fields can be positioned as required by the user.

018 ADD NARRATIVES TO CHEQUE REQUISITIONS

When creating a cheque requisition, additional information can be added to the Narrative box.

- Create the Cheque Requisition and add the Bank, Payee and Value.
- Click to the Narrative box
- Use the Narrative buttons to add additional information either before or after the existing narrative or type the additional information

	Bank	Office Bank A/c					✓ Date	27 Feb 2019	[
	Payee:	Mr Noel Commons					✓ Value		1,230.0
	Handler:	Carol Nolan					~	Third Party	
	Narrative:	Pd Mr Noel Commo	ns -					•	-N N
	Notes:								
Matte	er Details –								
	Matter:	FLY001/0001							▲))
	Jack Flynn Road Traffic Accident at Junction 9 on M50								
			t at Junction 9	on M50					
		Road Traffic Acciden (Outlay)	t at Junction 9	on M50					
			t at Junction 9	on M50					
		(Outlay)	t at Junction 9	on M50					_
		(Outlay) Outlay Code:	t at Junction 9	on M50					0.00

• Finalise the requisition in the normal way

019 **CHEQUE REQUISTIONS** CAN USE LOGGED IN HANDLER DETAILS

When creating a Cheque Requisition it is now possible to have the Logged In Handler's ID appear in the Handler Field on the Case Diary rather than the Fee Earner ID. This option must be activated by the System Administrator.

020 KEYD-5369 KE

When creating a credit note, the Invoice details will be visible on the Credit Note Screen.

		Draft Invoic	2					
🖌 Ok	Message:							
Cancel	Request Type:	edit Note 🗌 Bill Sent		Credit N	ote No: (not invoiced)			
•	Invoice	Number: 233 Batch Number: 334						
	Narrati	ve: Invoice: Fees:1000 Outlay	0 VAT:230					
	Matter Details							
	Matter:	WEI001/0002	James Weis		Bills:	1,230.00		
hoose report	Handler:	Justin Phelan Y			Outlay:	0.00		
iil Layout 💌	Description:	Purchase Penthouse Suite Moreha	Purchase Penthouse Suite Morehampton Court Dublin 4					
Print Copy	Date:	07 Mar 2019 Y Tra	nsfer To Pay		Charges:	0.00		
	Bill To:	James Weis			Time (HH:MM):	0:00		
Approve	Client	22 Nutley Lane Donnybrook						
Approve	Color	Dublin 4						
	Our Ref:	JP Your R	é.					
Release	Write down Time to:	07 Mar 2019 🗸						
	Invoice Details Fee	Earner Breakdown						
Notify Release Inv					Fee Earner			
Notify Release Inv Create FNL	Type Narrative		Net	VAT Value	Hee Earner			

Time Ledger



CUMULATIVE CHARGE

he column Running Balance has been changed to Cumulative Charge.

Strong Room



When withdrawing items from the Strong Room, a Final Receipt date can be set.

	Strong Room - Withdraw File	х
If you (Confirm below, this item will be SIGNED OUT TO YOU!	
For Who*		~
	Withdraw Permanently	
Comments*		^
		~
	Confirm Withdraw Can	el

This date can be added to the Strong Room Grid on the Search/Open window.

• On the Header Row, right click and select Show All Fields

Attn	ATR	Item Code	Matter Code	item Type	Item Description	Status	Open/Closed	Destroy Date	Fee Earner	
									Column Chooser	
		0000123131	BLA001/0001	Deeds	Gordon T. Black/		0		LARCHINA PROVINCIA A	
		CDA1111	A88001/0004	Deeds	George J Abbott/	0	0	08 Aug 2014	Executor Name 1	
		0000123130		Backup T	Year end backup			19 Jun 2014	Executor Name 2	
		0000123129	AAA001/0001	Compan	AAA Securities Lt			19 Jun 2014	Executor Name 3	
		0000123128	RYA002/0001	Wills	Margaret Ryan/	1		18 Jun 2014	Executor Name 4	
		D1234	CUL001/0001	Deeds	Ann Marie Cullen			30 Aug 2014		
		0000123127		Backup T	Year End Backup	1		18 Jun 2014	Final Receipt	
		0000123126	FEN001/0001	Wills	Richard Fennell/			18 Jun 2014	Deed	
		0000123125	AAA002/0002	Papers	AAA Worldwide R			18 Jun 2014	Will	
		0000123124	AAA002/0002	Compan	AAA Worldwide R			18 Jun 2014	Rem Type Code V	
		LEA1811	EVE001/0003	Lease &	Ever Green Incur		0	18 Jun 2014	Rrian Sweeney	

Select Final Receipt and drag to the Header Row.

Attn	ATR	Item Code	Matter Code	item Type	Item Description	Status	Open/Closed	Final Receipt	Destroy Date	Fee Earner	
			A88001/0005	Deeds	George J Abbott/			26 Feb 2019		Brian Sweeney	-
		0000123131	BLA001/0001	Deeds	Gordon T. Black/		0	26 Feb 2019		Brian Sweeney	
		CDA1111	A88001/0004	Deeds	George J Abbott/	0	0	26 Feb 2019	08 Aug 2014	Mark Kelly	
		0000123130		Backup T	Year end backup	1			19 Jun 2014	Brian Sweeney	
		0000123129	AAA001/0001	Compan	AAA Securities Lt	1			19 Jun 2014	Brian Sweeney	
		0000123128	RYA002/0001	Wills	Margaret Ryan/				18 Jun 2014	Brian Sweeney	

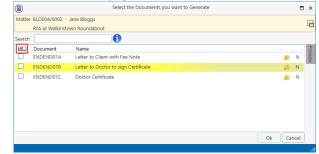
• Save the view to keep the column visible.

Document Generation



When using the new Document Generator, It is now possible to select all documents in an action for generation rather than having to select each one individually

• In the Case Diary, generate the action.



- Click on the box containing the tick to select all documents in the list.
- Click on the blank box to deselect all the associates



When generating documents through the new Document Generator, the user can now select all associates rather than selecting each individually.

- In the Case Diary, generate the action.
- Select the required document/documents and click OK.

	Select Case	e Associate(s)		×
Matter	BLO004/0002 - Jane Bloggs			Ŀ
	RTA at Walkinstown Roundabout			40
Search	1		Add/Maintain	
ØD	Name	Company	Туре	Pre
	Bank of Ireland		Lending Institution	Preview
	PTSB		Lending Institution	
<			>	
			Ok Skip Cancel	

- Click on the box containing the tick to select all associates in the list.
- Click on the blank box to deselect all the associates



A Progress Bar will appear at the top of the Case Diary when generating documents in the New Document Generator.

G	ener	atin	g Do	cum	ents. Please wa	it.				
CL	urrer	it Ac	tion:	Pre	aring Preceden	ts				
								1 of 3		
5	Sear	rch							Standard View	۰ (
					Date	Time	Handler	Synopsis	Action Co	
					25 Feb 2019			Enter Appearance and return PI Summons		1

Warnings whenAssociate Type notAvailable

Occasionally a letter may be set up where the Associate Type does not exist. If this occurs a warning is generated for the user.

- Create the document in the normal way
- Character FLY001/0001 Jack Flym Road Traffic Accident at June Please provide some missing information Matter FLY001/0001 - Jack Flym Road Traffic Accident at June PLASE NOTE: There are no "gatilitem" contacts at Would you like to add a new "gatting" Ves - Create New "gat

OK

- Click OK
- If you have permission to create New Associate Types, the create Associate Type dialog box will appear.
- Create the Associate Type and continue to generate the document as normal.
- If you do not have permission to create Associate Types, the following warning will appear

Cannot Generate	Document(s)
\mathbf{i}	You are trying to generate a document for Associate type "gatilitem" and this type is not defined in your system. You are not authorised to create new Associate types.
	Qk
	(and the all an unsert will some mate

• Click OK and the document will generate without the Associate details.

027 KEVD-5759 COLUMN WIDTH FOR FOLLOW ON ACTION INCREASED

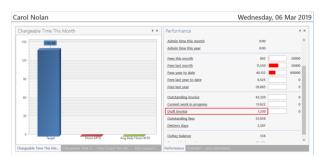
The description of follow on actions is now displayed in full.

	Decision	Code	Next Action Description	On	
+ [Do	PRC02	Investigate title	Tuesday, 26 Feb 2019	
	Do	PRC13	Check whether draft contracts, Client further info received	Tuesday, 26 Feb 2019	

My Overview



When a Fee Earner clicks on the Draft Invoice option on My Overview, all invoices in the draft stage of the process will be visible



Click on the Hyperlink

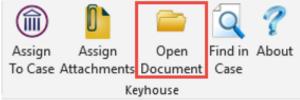
)			Draft Invoices				-	
	Search							Pri	nt
	Code	Description	Date	Total	Fees	Outlay	Misc Outlay	VAT	
Þ	WEI001/0001	Sale 22 Nutley Lane	06 Mar 2019	1,230.00	1,000.00	0.00	0.00	230	.00
								1	_
				1,230.00	1,000.00	0.00	0.00	230.	00

Outlook



t is now possible to open case documents in Keyhouse from Outlook.

• In the Keyhouse group of options on the Home Ribbon, click Open Document



• Select the matter from the Search List and click OK.

			Advanc	ed Matter Search	•
Search:					🕨 Go 🏋 Reset 🗧
Code	٩	Name	File Colour	Description	
FLY001/0001		Jack Flynn		Road Traffic Accident at Junction 9 on M50	10 Rose Lawns Bl
BLA001/0001		Gordon T. Black		RTA Walkinstown Crossroads, G. Black	23 Ellis Park Rath
TAR001/0001		George Tarrant		Purchase 45 Darndale Green, Dun Laoghaire	45 Newpark Aven
WOM002/0001		Womack Hotels		Service Agreements	22 Ballybarn Road
A88001/0002		George J Abbott		Purchase 7 Church Street, Rathgar, Dublin 6	60 Somerset Roa
BLA001/0007		Gordon T. Black		Rates Collection proceedings action	23 Ellis Park Rath
BLA001/0004		Gordon T. Black		Purchase of 8 Clonattin Hills, Wicklow.	23 Ellis Park Rath
BLA001/0002		Gordon T. Black		2 Trinity Close, Rathgar, Dublin 6	23 Ellis Park Rath
WEI001/0001		James Weis		Sale 22 Nutley Lane Donnybrook Dublin 4	22 Nutley Lane D
NEI001/0002		John Paul Neilan		Purchase 23 Green Lane, Blackrock Co Dublin	Stradbrook Road
EVE001/0003		Ever Green Insurance Corporation		Sale of Ravensdale Estate, Wicklow, Co. Wicklow	Ever Green House
RYA001/0001		James Ryan		Purchase 8 Monstown Avenue, Co. Dublin	77 Dench Street, I
REG001/0003		Andrew Regis Construction Ltd		Sale 19 Green Court, Bray, Co. Wicklow	5A Flintstone Hou
LYN001/0002		Roger Lynch		Purchase 4 Main Street	90 Crumlin Road,
<					>
				Ok	Cancel

• Select the document to be opened, by searching or clicking directly on it. A preview is also

	-
available.	
Open Case Documents	

sarch: [🕨 👂	Clear
T	Document	Class 🔍	 Date 	^
1	Letter to Client	Client Letters	12 Dec 2018 00:00:00	0
1	Letter from State Solicitor confirm	Letters/Interparte Correspon	15 Jun 2018 15:34:45	
E	Draft Pleadings from Counsel	Pleadings	15 Jun 2018 15:33:54	
12	Letter to Barrister encl Medical Re	Correspondance	15 Jun 2018 00:00:00	
E	Letter to Barrister requesting Opi	Correspondance	15 Jun 2018 00:00:00	
12	Letter to Client re reply from barr	Client Letters	15 Jun 2018 00:00:00	
12	Letter to Barack Obama re defen-	Client Letters	15 Jun 2018 00:00:00	
E	Verifying affidavit of Leo Varadka	Correspondance	15 Jun 2018 00:00:00	
1	Trump to Chief State Solr	Correspondance	15 Jun 2018 00:00:00	
12	Statement of Claim	Motion papers	15 Jun 2018 00:00:00	
E	Report of Dr Phil Philpott	Medical Reports	15 Jun 2018 00:00:00	
1	Personal Injuries Summons_14	Court Documents	15 Jun 2018 00:00:00	
1	Order of Mrs Justice Michelle Ob	Court Documents	15 Jun 2018 00:00:00	
12	Order of Master Barack Obama	Court Documents	15 Jun 2018 00:00:00)
<				>
Include	all E-mails v			Open

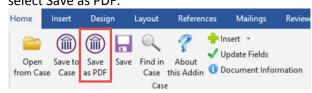
Click Open.

Word



Occasionally it may be necessary to save a Word document to a case as a PDF. Rather than having to save it as a PDF outside the system and then capture it in, this can now be done directly from Word.

- Open the document to be saved to Keyhouse.
- In the Keyhouse group on the Home Ribbon select Save as PDF.



- Click Save as PDF.
- Select the case, change the name of the document, if required and set the document classification.

۲		Advanced Matter Search						
Search:								
Time	Code	۹	Name	File Colour	Description			
	FLY001/0001	Jack Flynn			Road Traffic Accident at Junction 9 on M50	10 Rose		
	BLA001/0001	Gordon T.	Black		RTA Walkinstown Crossroads, G. Black	23 Ellis P		
	TAR001/0001	George Tar	rant		Purchase 45 Darndale Green, Dun Laoghaire	45 Newp		
	WOM002/0001	Womack He	otels		Service Agreements	22 Ballyt		
	A88001/0002	George J A	bbott		Purchase 7 Church Street, Rathgar, Dublin 6	60 Some		
	BLA001/0007	Gordon T. I	Black		Rates Collection proceedings action	23 Ellis P		
	BLA001/0004	Gordon T. I	Black		Purchase of 8 Clonattin Hills, Wicklow.	23 Ellis P		
	BLA001/0002	Gordon T. I	Black		2 Trinity Close, Rathgar, Dublin 6	23 Ellis P		
	WEI001/0001	James Weis	James Weis		Sale 22 Nutley Lane Donnybrook Dublin 4	22 Nutle		
	NEI001/0002	John Paul N	4eilan		Purchase 23 Green Lane, Blackrock Co Dublin	Stradbro		
EVE001/0003		Ever Green Insurance Corporation			Sale of Ravensdale Estate, Wicklow, Co. Wicklow	Ever Gre		
<	RV4001/0001	lames Rvar			Purchase 8 Monstown Avenue Co. Dublin	77 Denri		
ocumer	nt Name: Docum	ent1				Save		
Docume	nt Class: Genera	ss General						
We	ork Type: System	ype: System Actions v Action: Saved Document						

• Click Save to save it to Keyhouse.

Personal Settings



Rather than having to choose to have your screen default back to your default view when changing views, the system will do it automatically going forward. If you would like to keep the selected view as you move from matter to matter then Pin the view

- 1. Open the Case Diary for example
- 2. Click on the pin Net Suffic Academic A section 9 to M30 The Click on the pine Net Suffic Academic A section 9 to M30 The Click on the Suffic Academic A section 9 to M30 The Click on the Suffic Academic A section 9 to M30 The Click on the Suffic Academic A section 1 to S
- 3. This will hold the selected view as you move from matter to matter.
- 4. To keep it returning back to your default view, ensure the pin is no set.