# Upgrading to Version 5

CostsMaster Draftsman has been enhanced to provide support for the New Format Bill and has improved certain features used for importing work and in the preparation of costs budgets, assessed costs, N260's and CCMS claims.

Fundamentally, CostsMaster 5 does not look any different from CostsMaster 4 and unless you are preparing a New Format Bill and change one setting to allow you to enter Tasks and Activities or Expenses, the grids will look exactly as they do now and you will enter work in the same way.

The **New Format Bill** introduces the elements of Task and Activity or Expense. To enable these new fields you must select either "New Bill Phases, Task & Activities" or "J-Codes" in Show Phases in the Control Centre.
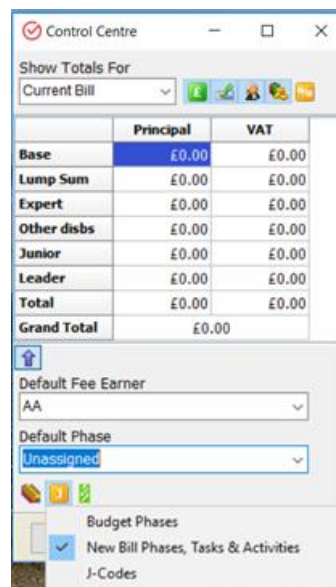
You can change between New Bill Phases, Tasks & Activities and J-Codes as you prepare the bill and the values for phases, task and activity will update to match the new settings. You can even enter data based on one type of setting when showing another e.g. enter the J-Code whilst showing New Bill values.

With attendances, documents and disbursements ensure that the columns of Phases, Task and Activity or Expense are visible. If you arrange your columns so that you select your task first then CostsMaster will infer the phase automatically. If you select your phase first then the list of tasks is filtered to those that match the phase.

Tasks, Activities & Expenses can be recorded in several different ways, either from a drop down list; by starting to type the text and the first match will be selected automatically; type the J-Code or define various key-word pre-sets and when that word is found in the description the appropriate task, activity or expense will be set automatically.

With routine communications set the appropriate activity in Parties.

When recording the routine item select the task from the drop down list and from this the phase will be inferred. The phase will show as unassigned in the Party Details window unless the phase has been set in the Parties window.

By opening Telephone Calls, Letters Out or Emails you will see the detail.

Setting a default phase in the Control Centre, Parties or Part will have a filtering effect on the available tasks in drop down lists.

The Tools available have been extended so that you can search for Unassigned Tasks, Activities and Expenses and it is also possible to Apply Tasks & Activities.

In the Export Wizard the New Format Bill has its own section and can be exported in Word, Excel and PDF. The Excel spreadsheet contains a "Print Version" tab which contains the essential information found in the "Bill Detail" tab and this is utilised for the Word document otherwise it would be too wide to print.

Other changes to CostsMaster include:-

When entering an expert's disbursement for a **Costs Budgets** it is no longer necessary to specify whether the fee is for a joint statement, conference or disbursement in the description as we have added a column "Expert Type" with the options available in a drop down list.

In Parties the **N260** Section has been renamed N260 Party and there is a new N260 Party option of "Not Specified". In Attendances and Documents there are new fields for N260 Section and N260 Party.

CostsMaster Draftsman comes with the option to open our new budget based program, **Quota,** via a separate shortcut on the Start menu.   Quota contains a reduced set of features intended solely for producing budgets and N260's.

Due to the introduction of J-Codes the new V2.1 Import Schema includes support for J-Codes and the New Bill Phases, Tasks & Activities when **Importing Work**. We have added a new import field "CMS Category" and there are new options to import pending work from a different Costsmaster file and import time in units.

The **Disbursement Report** now includes a Phase column.

There have also been a few changes made in relation to **Legal Aid** claims. We have a new method for recording assessed costs to allow claims where the VAT rate is different for items under the same heading. There are also new buttons to insert and delete joint experts in Legal Aid Claim Settings > Counsel & Experts.

For **CCMS** claims the Adjustment Bill Type has been enabled in Legal Aid Claim Settings.