ESILAW 2006.1
Release Notes

Welcome to ESILAW version 2006.1! As always, we would like to thank you for your comments and suggestions as they have helped us to produce an easier-to-use, more functional product. Following is a list of new features and changes in this update.

Brand New, Fully Integrated Billing Module

ESILAW 2006.1 features a brand new billing module. This billing module was designed from the ground up with a combined focus on maximum flexibility and ease of use. The new billing module is fully integrated in ESILAW and works without a Word Processor, although it can produce Word compatible RTF files, which can be edited in Microsoft Word. Billing now allows you to work with clients throughout the various stages of billing (i.e. draft bills, payments, and final bills) with the utmost flexibility. In addition, it offers a number of new features such as task-based billing, multi-client billing, summary reports, and much more.

New features include:

- Updated Billing menu in ESILAW now displays two columns; Billing (new 2006.1 billing program) and Word Processor Billing (existing 2005 billing program).
- Generate single or multi-client bill runs.
- Select clients or matters for billing using a wide range of criteria such as lawyer/timekeeper, area of law, and major client.
- Specify what to include on your bill - time, disbursements, payment history, and trust history, with user-defined date ranges.
- Include non-billable time on bills.
- Sort multi-client bill runs by client, matter, or responsible lawyer.
- Use standard billing options such as Group Disbursement by Code and Long/Short Date formats.
- Exclude clients from bill runs based on a minimum amount owing of fees, disbursements, or other charges.
- Print envelopes.
- Automatically create Rich Text Format (RTF) bills, which can be opened and edited using Microsoft Word®.
- Save your bill settings as defaults.
- Create bills/reminders during your bill run for past due accounts with no current activity.
- Edit time and disbursement entries on client files from within the billing module.
- Filter draft bills in your Draft Bills view by lawyer or major client.
- View/print draft bills for all clients or selected clients.
- Produce a draft summary report with balance forwards, current bill amounts, taxes, and totals.
- Easily add or remove clients from bill runs at any stage in the billing process.
- Apply manual payments to bills or set automatic payments at the client level.
- Set fee allocation globally, at the client level, or at the bill level.
- Automatically post final bills without using the Fee Billing or Trust Transfer posting programs.
- Automatically post and print trust checks and print client receipts for payments.
- Produce a final summary report with balance forwards, current bill amounts, taxes, payments, and totals.
- Return to your billing session at anytime to continue working on draft bills, payments, or final bills that you have not yet finished.
- Produce a final bill at any point in the billing process without impacting clients you have already selected or modified in your current bill run.
- Restrict posting and check printing in billing through Set Passwords.

** Word processor billing will be phased out by June 30th, 2007. RTF bills will replace word processor generated bills.*

Task-Based Billing

- Use the new Task Code Maintenance program to manage task, activity and expense codes that are used when posting to task-based client files.
- Set clients as Task-Based billing to restrict the use of specific codes in Time and Expense entry.

Split Billing (requires use of 2006.1 billing module)

- Split bills among multiple parties.
- Split time and/or disbursements based on percentage.

E-billing (optional module)

- Set electronic bill formats at the client level and configure custom options related to the e-bill format specific to your firm.
- Automatically produce e-bills for e-bill clients using the new billing module.
- LEDES, Legal Guard, and ICBC formats (other formats available upon request).

Reverse Bills

- Easily reverse bills posted in the Billing program (or in Fee Billing) using the new Reverse Bills feature on the Billing menu. Simply select a client file number and select the bill to reverse.

Reprint Bills

- Reprint original bills as Rich Text Format (RTF), which can be opened and edited using Microsoft Word®.

Client File Maintenance (billing features relate to 2006.1 billing)

- Specify the fee distribution method to be used when the client file is billed. Allocate fees to the responsible lawyer, prorate the fees based on the time posted to the bill, or prorate based on percentage.
- Set a billing template at the client level to be used when billing.
- Exclude client from billing option.
- Specify if the client is a task-based client and set the Task Code Type.
- Specify an E-bill format.
- Set Auto Transfer Trust to Pay Bill to automatically apply payments to bills generated in 2006.1 billing.
- Set an optional Bill To address.

Security

- ESILAW security has been updated to enable you to control program access by assigning user levels to individual ESI users in addition to assigning users to groups.

Transaction Reversals

- Automatically reverse entries in the majority of posting programs by selecting the Reverse radio button and choosing the entry to reverse from a pick list.

Posting

- The Firm Checks posting program has Auto fill enabled, which stores payee names. Save time when posting by typing the first few characters of the payee name and then selecting the name from the list of matching payees. Auto fill will be enabled in the majority of posting programs in the next mini-release.
- The Time Entry, Disbursement Entry and A/P Invoice programs now support posting using task, activity and expense codes for task-based clients.

Accounts Payable

- The A/P Checks program has been modified to enable easier posting of partial payments.
- The A/P Checks program has been modified to enable writing A/P checks on trust accounts.

Reporting

- The IRS Form 1096 has been added for United States reporting requirements.
- Trust reporting for firms operating in British Columbia, Canada has been updated in accordance with new Law Society requirements.

ESILAW Amicus 2006.1 Interface (available for $99 through ESI or your local dealer)

- Automatically transfer clients from Amicus Attorney to ESILAW in the background, without user intervention.
- Transfer time from Amicus Attorney to ESILAW.