

ESILAW 2006.4

Release Notes



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Contact Manager

- ESILAW 2006.4 features a brand new, fully integrated contact manager that allows you to manage client, vendor, and personal contacts. The Contacts manager can be accessed using the ESILAW Navigator or through File Maintenance > Contacts.
 - The Contacts manager is used to add, edit, delete, and search for contacts. You can also manage contacts from File Maintenance > Clients (Contacts tab), Accounts Payable > Vendor Maintenance, Client Inquiry (Contacts tab), and Timetracker > Client Inquiry (Contacts tab).
 - Contacts can easily be linked to Clients and Vendors.
 - Create public and private contacts. Contacts marked as private will only display to the owner/creator.
 - Define contact Types (i.e. Client, Vendor) and Roles (i.e. Doctor, Witness) to help you easily identify contacts and filter searches for them.
 - Conflict Search has been updated to search the contact database. Contacts marked as Private are not included in Conflict Searches.
 - Access to contacts must be granted using System > Set Passwords if you are on a system with multiple user accounts defined.

Retainers (not available in Canada)

- ESILAW 2006.4 features the ability to handle retainers and retainer-related transactions. The following features pertaining to retainers are now available;
 - Set a Minimum Retainer Balance in File Maintenance > Clients for auto-replenishment of retainers. This feature automatically calculates the required replenishment amount and displays it on the bill for clients who have a Minimum Retainer Balance defined. The replenishment is included in the bill total, but no transactions are posted as it is a memo only.
 - Receive retainers using Posting > Retainer Receipts and apply them to client files, client invoices, or both.
 - Use retainers to pay client bills in Billing > Create Bills by applying payments in the Bill Single Client or Apply Payments/Transfers tab. When a payment is applied to a bill a receipt is printed for the client, combining both trust and retainer payments as the total receipt.
 - Use retainers to pay accounts receivable after bills have been created using Posting > Retainer Transfers to Pay A/R.
- The following client reports display client retainer balances.
 - Client Listing
 - Client Listing by Major Client
 - Matter Summary
- Client Inquiry and Timetracker Inquiry
 - A Retainers tab has been added to Inquiry > Client Inquiry and Timetracker Inquiry. This tab displays retainer history and balances for the selected client. Retainer history for a client can be printed from Inquiry as well.

Create Bills - Applying Payments to Bills

- Enhancements have been made to the Create Bills application to simplify applying payments and to also allow bills to be paid using multiple trust and retainer accounts.

Posting Menu > Fee Billing

- The Fee Billing feature has been renamed to Modify Bills. This feature can be used to modify bills that have been created and posted through Billing > Create Bills. Modify Bills allows you to adjust fee and disbursement amounts on posted bills without having to reverse and re-enter bills.

Inquiry – Maximize Feature

- The Inquiry window can be maximized to full screen, allowing you to view more information on screen. Additional maximize functionality will be added throughout ESILAW in subsequent versions.

MICR Check Printing Module

- ESILAW now offers an MICR check printing module as an add-on. This module allows you to print checks on blank check stock using an MICR compatible printer. Contact your local dealer or ESI for more information or to order this module.

Timetracker

- The Timetracker toolbar has been modified to display text and icons for toolbar buttons.
- Timetracker Inquiry displays contacts associated with the selected client under the Contacts tab. Contacts details can be viewed by selecting a contact followed by the View button.
- Timetracker Inquiry features a new Retainers tab, which displays Retainer history for a selected client.

Find Feature Performance

- The Find feature has been optimized to improve performance when searching for transactions in large databases.

ICBC Billing Module (available in Canada only)

- Enhancements have been made to the ICBC billing module to improve compatibility with ICBC standards. ICBC electronic bills can be generated from Billing > Create Bills or Billing > Create Bills (word processor). The E-billing module is required to produce ICBC bills.

Enhancement & Bug Fixes

- Additional minor enhancements and bug fixes.