

ESILAW 2007.2 Release Notes



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Calendar

ESILAW 2007.2 introduces a brand new, easy-to-use calendaring system that's fully integrated and ready to use without any additional software installation. The Calendar is designed specifically with law firms in mind and offers standard features such as appointment and task entry, recurring entries, reminders, and reporting. Calendars can easily be shared among users in the firm using the built in security controls, allowing users to schedule appointments and tasks for others.

- Fully integrated calendaring with no additional software installation required.
- Appointment and task entry.
- Assign clients, contacts, lawyers, appointments and location codes to appointments and tasks.
- User defined appointment codes and location codes.
- Set due dates, start times, end times, durations, and all day events.
- Recurring functionality for daily, weekly, monthly, and yearly recurrences.
- Set reminders on appointments and tasks.
- Active reminder feature notifies you if reminders are present for the current day.
- Post time directly to clients through Calendar or into Time Entry for review prior to posting to client files.
- Print appointments and tasks, calendar reports with daily, weekly and monthly views, and appointment and task listings.
- Use Set Calendar Access to share calendars among users.
- Enter appointments or tasks for your own calendar or in a shared calendar.
- Run reports on shared calendars for distribution to other users.
- Automatically display the appointment listing on Calendar startup.

In addition to the above features Calendar offers additional time-saving features that will help you improve productivity in your firm.

QuickFile 4Outlook (optional module)

ESILAW's Quickfile 4Outlook is a Microsoft Outlook® e-mail management tool that will help you file, track, and organize all of your client and inter-office e-mail correspondence. Quickfile eliminates the tedious process of manually filing sent and received e-mail and provides faster access to view and print messages. Whether you use Outlook® Personal folders (stand-alone) or Microsoft Exchange® folders (public), Quickfile will save your firm valuable time by streamlining the management of your e-mail correspondence.

- Instantly file messages you send into an assigned client folder without having to click and drag or manually move them.
- Automatically file read messages in your Inbox into assigned client folders.
- Assign multiple folder shortcuts to a single e-mail address to allow easy filing of mail that belongs to a client with multiple matters and only one point of contact e-mail address.
- Assign client numbers or a custom field to sent e-mails so you can easily identify them for filing after they are printed.
- Built-in print management tool allows you to batch print all of your e-mails for manual filing.
- Create e-mail storage folders in Outlook® through ESILAW using the built-in scheduler. Folders can be created manually or automatically by setting the scheduler.
- Create e-mail storage folders in Outlook® through ESILAW Inquiry or Clients for clients or matters without an e-mail storage folder by simply clicking on a 'Create Folder' button.
- Each user can specify their own location for e-mail folders or the firm administrator can specify a public location (i.e. Exchange Public folders).
- Fully integrated with Microsoft Outlook® 2000 or higher and ESILAW 2007.2 or higher.
- Designed for use with Outlook® Personal folders (stand-alone) or Microsoft Exchange Public folders.

For more information on Quickfile 4Outlook visit www.esilaw.com/quickfile.htm.

Enhancements & Bug Fixes

- Added Calendar Icon and set Calendar Access to the menus.
- Added additional User Preferences relating to Calendar.
- Added Quickfile 4Outlook e-mail management tools and scheduler in ESILAW for client e-mail storage folder creation in Microsoft Outlook.
- Added an E-mail tab to Inquiry and Clients for accessing Quickfile e-mail storage folders and for creating them (Quickfile 4 Outlook module required).
- Addressed problem in Billing (Mass) – Draft bills where it would calculate the PST on a file where PST was set to (N) no.
- Removed “Release Notes/Install Instructions” label from the Check for Updates grid.
- Resolved issue in Contacts where a user would assign a fax number to the first contact in the list and it would replicate to other contacts.
- Addressed an error in Disbursement Transfer that was caused when selecting the time button on the transfer disbursements screen.
- Fixed problem with duplicating fees on lawyer distribution in Fee Billing.
- Adjustments to cursor control when posting a firm receipt to the same client and paying multiple invoices.
- Corrected the totals in Firm Receipts under the “Total Unposted Transactions” when a combination of receipts to clients and general ledger accounts exists.
- Resolved issue when running the Operating Statement for the year end month where the budget year to date value was showing the incorrect values.
- Resolved problem that occurred in Inquiry > A/R when sorting the grid by reference number.
- Resolved issue regarding the rounding of A/R disbursements on the Lawyer Distribution Listing.
- Corrected an error in Set Passwords when adding a new user and using the pull down menus.