

ESILAW for Windows V4.5



New in Version 4.5!

Welcome to the version 4.5 release of ESILAW for Windows! This release includes numerous changes and improvements in the software that we're confident you'll find to your liking and will help improve your day to day efficiency in the office. We thank you for your comments and suggestions as they have helped us to produce a faster, easier to use, more functional product. Listed below are the details outlining the changes made in this release.

AR Write-offs

- The screen has been modified to use 'View Tabs', similar to other posting programs.
- You now have the ability to view entries before posting and delete any that are incorrect.

Cash Disbursements

- The screen has been modified to use 'View Tabs', similar to other posting programs.
- The general ledger expense account being posted to can now be associated with the disbursement code, allowing posting without entering the expense account.

Client Inquiry

- The Trust and Accounts Receivable detail reports have been modified to print starting at a particular date, similar to printing the Time and Disbursement details.
- All detail reports now include the Closed Date in the header for closed clients.
- Accounts Receivable aging has been added to the Inquiry Balances screen.
- A new "Print Multiple Inquiries" screen allows printing of multiple client inquiries at the same time.

Client Maintenance

- The client name and mail to names have been expanded to 60 characters
- The screen has been modified to be easier to read and to make data entry more efficient.
- New fields have been added to allow you to store the client's email address and to select an Assigned lawyer.
- Client files can now be assigned a default rate for fees. This rate will be used as the default for time posted either through the Time Docket posting program or in Timetracker.
- The screen includes separate tabs for entering and viewing Conflict of Interest and Limitation Diary entries.
- New client files can now be numbered automatically by enabling the Automatic Client Numbering feature.

Fee Billing

- Multiple bills can now be posted to the same client file on the same audit.
- The Anticipated Disbursements tab displays the name of the general ledger expense account instead of only the number to allow the account to be verified by name.

Firm Cheques

- The screen has been modified to use “View Tabs”, similar to other posting programs.
- Data entry has been improved. Cheques can be distributed to multiple client files or general ledger accounts by entering the cheque information only once and distributing the cheque to multiple accounts.
- GST and PST amounts can be modified if taxable while posting.

Firm Receipts

- The screen has been modified to use “View Tabs”, similar to other posting programs.
- You can now delete saved transactions prior to posting, if corrections are required.

Limitation Diary

- Reports can be run by Individual lawyer as well as by Responsible lawyer.
- Limitation diary items can now be entered in the Client File Maintenance screen.

Trust Transfers to Pay AR

- ESILAW now has a Trust Transfer to Pay A/R posting program.

Trust Cheques

- The screen has been modified to use “View Tabs”, similar to other posting programs.

Client Maintenance Quick Add

- All posting programs use the new Client Maintenance Quick Add.

User Information

- The User Information screen on the Utilities menu now checks for other users logged into Timetracker and Bill Generator as well as ESILAW.

Reset User

- The Reset User option now checks for other users logged into Timetracker, Timetracker Plus and Bill Generator and lets you reset these users if they have exited incorrectly or were unable to end their programs under normal conditions.

GST Reports

- Corrected issue with date range in report header being truncated.
- Reports now include journal entries from previous year.

System Parameters

- The System parameter information such as the system settings, control accounts, and tax settings are now all entered on the same screen.

Menu background color

- The background color of ESILAW’s menus can be customized by the end user.

Audit printing

- The audit printing program has been modified to allow you to print both pages of the audit on the same page.
- The audit printing format has been modified to use less space. A typical multiple page audit uses up to 40% less space, resulting in significant paper usage savings.
- The Print Unprinted Audits program displays how many unprinted audits of each type exist.
- You can now close files without printing audits and still print the audit later.

Assigned Lawyer

- ESILAW now allows you to track assigned lawyers. This field is set in Client File Maintenance while you are opening files or at any time after a file has been opened.

New Bill Generator

- A new version of the Bill Generator has been created that is faster, easier to use and has more features than the current Bill Generator. The new Bill Generator lets you select time or disbursement entries and mark or unmark items that you want to appear on the bill. It also runs slightly faster than the previous version. **The new Bill Generator does require new templates or modifications to your existing templates, but the modifications are minor.** You must change the heading on the amount field from “**_amount**” to “**_hamount**” (doesn't have to be bold, this is just for clarity). Also, we have included 5 new sample templates with the new Bill Generator.

Year End

- The yearend warning message now informs you that you must do yearend before posting entries to the new year.

Remote Time Update

- If you use TimeTracker or third party software (such as Amicus Attorney) to record time and post the entries through the remote time audit, you will notice a significant saving in printed pages.
- The remote time update report now produces an error report if errors are encountered.

Lawyer Rates

- You can now enter up to 25 optional rates for each lawyer.

Trust Ledger by Client report

- This report has been modified to print in Portrait format to be consistent with the other reports and to use less paper.

Install Network module

- Additional network licenses can be installed automatically from within ESILAW. Contact ESI Software for more information on installing or purchasing network modules.

Install Custom Programs module

- Custom programs such as the Bill of Costs program can be installed automatically from within ESILAW. Contact ESI Software for more information.

Closing Client Files

- You now have the option of not printing the client details when you close files. If you are closing more than one client file at a time you have the option to print all client details or no client details. You will not be able to select print for each specific client file closed in the case of closing multiple files.

Closed File Destruction Date report

- ESILAW now allows you to print a report based on client file destruction dates. The report can also be run in Closed Date order.