ESILAW for Windows v6.0

Law firms often ask us if there is an easy way to look at last year's data? Can we compare this year to last year? Can we post in the current year then go back and make adjusting entries in the previous year? ESI-LAW v6.0 now provides the ability to do all of this. The system is now entirely date-sensitive and the **General Ledger is multi-year**, which means you can post current year entries and make adjustments to the prior year as required (password controlled). You can also run reports for any month in any year.

At a recent meeting with lawyers from a number of firms we mentioned that ESI-LAW v6.0 would include a report that with current month and year billings and receipts, bank balances for your general and trust banks, total accounts receivable owed to the firm, G.S.T. and accounts payable balances, and up to five additional accounts selected by the user. The response was overwhelming as both lawyers and support staff remarked that they were able to retrieve that information, but that it often took up to two days. ESI-LAW v6.0 will create the new **Financial Status report** in minutes!

Secretaries and accounting staff often ask our support representatives if the client inquiry information can be sorted. ESI-LAW v6.0 allows you to **sort all client transactions in inquiry** using column headers such as transaction date or audit, and you can print the data in the sorted order.

Have you ever wanted to run quarterly reports in you General Ledger? You can now in v6.0 – simply enter the starting date, the ending date and run the report.

We've implemented a new **label-printing** program that allows you to print a number of different label formats. You can create mailing labels for a range of clients or all clients, you can print file folder labels for matters and file information labels for your Rolodex, and you can print file information labels that include all the pertinent information on a client file. All labels meet standard Avery laser label formats and the user can select the starting point on each page of labels.

Many clients have years of historical data residing in their ESI-LAW systems. ESI-LAW v6.0 lets you **archive data** that is over two years old so that client inquiry printouts, reports, and daily processing run significantly faster. You can also recall archived information by client by simply clicking on the '**include archived items'** option.

ESI-LAW v6.0 includes many other features and additional and additional details are provided below. ESI-LAW v6.0 has undergone **extensive testing** and has been in use by ESI for over three months. We are excited about the release of v6.0 and hope that you will appreciate the improved reporting system (speed improvements), the new easy-to-navigate menus, multiple year reporting, and all the other fantastic new features included in v6.0.

Client Inquiry

Often our clients want to look at time transactions for a single lawyer or trust transactions for a single bank. You can now sort time, disbursement, trust and accounts receivable entries when viewing the data on screen. Sorts are available by date, initials, audit, reference, billing status, G/L and Billable/Non-billable where applicable.

The description field of time entries can be enlarged so that lengthy time descriptions can easily be viewed on screen.

New Features in Version 6.0!

Client Files

A new labeling program has been added to the reports menu so that you can print selected client information on standard Avery labels. Formats include standard mailing labels, mailing labels with contact line, labels that fit rotary cards, file labels for file folders, and matter labels for file tabs.

Billing

Balance forward billing has been added to ESI-LAW v6.0. Many clients want to create their bills using balance forward billing, where the time credit is entered and the program automatically marks items as billed, based on the total credit entered.

The Bill Generator is now part of the ESI-LAW menu so that those in accounting have access to the billing function, without having to launch Bill Generator from the desktop.

A new recalculating bill template will be available shortly after the release of v6.0. We are currently testing this and will be delivering it to our clients by the end of May. This will mean re-creating existing templates – but it will be worth the time!

Posting

The posting menu has been modified to display more information to the operator. All posting programs also display last audit number used. Many firms like to write this number on their input documents so that tracing of entries (when necessary) is very easy. A real time saver!

All posting programs have been updated so that data can only be posted to the current financial year. If an operator attempts to post to a previous financial year (i.e. for year end entries), a password is required. Posting to future years is not allowed.

Reports

How would you like all your important financial numbers on one report? Run the new Financial Status report – it includes bank balances, GST payable, Accounts Payable, Work in Progress, billings and receipts for the month and year, and up to five accounts specified by you.

Do you sometimes need to know how many clients are in arrears for over 90 days, 120? You can now print an Accounts Receivable Exception report for those overdue clients and specify the period and/or the amount. You can also generate automatic reminder letters in Microsoft Word in combination with Microsoft Excel. A version for WordPerfect will be available shortly.

Several reports have been re-written to improve report generation time. Additionally, an archive option has been added to the File menu so that old data can be archived. In some firms, tens of thousands of historical entries exist and by archiving this old data, reports will run faster.

New Features in Version 6.0!

General Ledger

The G/L has been modified so that data for previous years is now available. All reports have been simplified so that they are selected for the current month automatically. Of course, you can change this and print or view reports for prior years or prior months in the current year.

An option to mark a G/L account as inactive has been added to the G/L. This lets you keep prior year data available while excluding unused accounts from the current year.

TimeTracker

TimeTracker has been modified to include a spell checker. The inquiry program in TimeTracker has been updated with all the new features (sorting, etc.) that were added to the ESI-LAW inquiry.

Navigation

All menus have been resized so that they are the same size, improving navigation throughout the menu system. The inquiry and posting menus now include "drill down" lists so that programs can be quickly selected from the main menu.

Yearend

In previous versions of ESI-LAW there was a requirement to print all audits before running yearend. This is no need to do this in version 6.0 as audits can be printed at any time – or reprinted (unless data has been archived).

Yearend is much simpler now – all you have to do is set the financial date range to the new year and you are done. Of course, you should run all the reports for your accountant first!

Speaking of accountants, ESI-LAW version 6.0 has a new report in the G/L that will list all audits created for the previous year after yearend. This will be invaluable to accountants and auditors when tracing previous year adjustments.