

ESILAW for Windows v6.5



CLIENT INQUIRY

- One-click view of transactions making up unbilled time balance.
- One-click view of transactions making up disbursements balance.
- One-click view of transactions making up A/R balances.
- One-click view of transactions making up trust balances.
- Client Information Sheet has been reformatted to include Client Notes and Limitation Dates.
- Improved Label form modification now allows font customization for labels.

LAWYER FILE MAINTENANCE

- Record and track lawyer budget amounts for hours and fees.
- Designate lawyer files as active or inactive.

CLIENT FILE MAINTENANCE

- Record billing template on client file to make billing faster.

LAWYER REPORTS

- New Report - Lawyer Activity by Area of Law shows current / YTD values for Billings, Receipts and Writeoffs.
- Lawyer Individual Time Summary report now includes lawyer budget amounts.
- You can now run the lawyer reports for a prior year.

GENERAL LEDGER

- Use the new "Drill down" on G/L reports to get more information on accounts and balances. With this new feature, you can view the G/L reports on screen. Then, clicking on any transaction line will display the audit for that transaction on your screen and give you the option to print it if necessary.
- You can now export your G/L reports to Microsoft Excel.
- You can use Summary codes to group accounts on the Operating Statement report.

POSTING

- A new feature, 'ESIWORDS', has been added to all posting programs which lets you set up 2 or 3 character abbreviations of commonly used phrases. These abbreviations can be set up by user. Use ESIWORDS to automatically insert frequently used text. For example, you may define "cc" to expand to "Certified Cheque". If you then enter the string cc in a description field, as soon as you press the following space character, the cc will be expanded to "Certified Cheque".
- The WIP Transfer program has been revised to make it easy to transfer Time or Disbursements.
- Disbursements are now editable using the new WIP Disbursement Edit program.
- Print Deposit Slips is now an option on the Trust and Firm Receipt posting screens.
- More options for how to calculate A/R Reminder interest; the DOS method is restored.
- Improved A/R Reminder form editing allows font customization.

CHEQUE PRINTING

- The check payee fields have been expanded to allow 60 characters.
- Improved check-modification screen - reset default check form, customize font.
- You can now print cheques directly from the posting programs.

REPORTS

- Improved report previewing for A/R Aging, Client Listing, Trust Listing, Lawyer Summaries and more. These reports now open on full screen when the VIEW is selected.

NOTE:

We have recently been made aware of relatively few ESI-LAW clients experiencing an occasional error being reported by Windows as a "Fatal Error C0000005" when printing or previewing a report.

Our latest research with Microsoft and various Technical advisors regarding this error all points to printer drivers, PostScript drivers and/or video drivers as being the most common cause, particularly if these instances are on sites using specific HP printer drivers. We have found that there is a relationship between the installed video driver and the printer driver with respect to fonts and formatting. So far, we have been able to eliminate many of these errors from most sites by having the responsible technician obtain newer or alternate drivers for troublesome printers. There appears to be an industry-wide disagreement regarding use of standard Windows printer drivers as opposed to HP-provided drivers.

We will keep you informed as to any specific aids we discover in our ongoing research.