

ESILAW v7.0 – New Features



Billing

- Assign invoice numbers automatically in either fee billing or in ESI Billing (Bill Generator). Invoice numbers print on bills produced using ESI Billing.
- Automatically post fee bills to client files based on bills produced using ESI Billing.
- Use **Draft Bills** to produce drafts for review, without incrementing your invoice numbering series.
- Edit descriptions of time entries in ESI Billing before producing the bill. Your changes will update the client file automatically.
- If you are producing bills for multiple clients at once, save time by printing them as they generate instead of waiting until they have all been produced.

Client Inquiry

- “Drill down” by clicking on any transaction in the Inquiry screen to view or print the audit on which it was posted.
- Select **Show All Client Matters** to view or print transaction details for all matters for a client file. This option is enabled only if you use matter numbers (subfiles).
- On the A/R tab, click **Show A/R Details** to see details of A/R fee distributions to lawyers. For example, if you distributed a fee bill to three lawyers, select this option if you want to see the individual amounts distributed to each. Clear this option if you want to see one line with the total amount of the transaction.
- It is no longer necessary to select Open or Closed files before entering a client number or doing a search. The closed date, closed number and page number will display when you select a closed file.

Reports

- Reports have been re-designed for consistency, and where applicable, can be printed for a single lawyer, for all lawyers, or for a range of lawyers.
- Improvements have been made to the speed at which reports generate.
- The Lawyer Activity report now includes non-billable time.
- The Trust Ledger report now includes closed client files.
- The A/R Aging report flags client files marked as “doubtful accounts” in Client File Maintenance.
- The A/R Reminders program includes the ability to print detailed accounts receivable statements including only unpaid invoices, or all invoices. Detailed statements include fee bills, receipts, write-offs and interest, and print on standard 8.5” x 11” paper.
- Print A/R Reminders with one, two or three reminders per page.

Client File Maintenance

- Automatically apply telephone number and address changes to all matters for a client file.
- A Doubtful checkbox has been added to enable you to flag a client file as a doubtful account on your A/R Aging report.
- A Corporation/Business or Other option has been added for the new version of Amicus

Attorney. It identifies the format of the First and Last Name when running the new Amicus Attorney client file transfer interface.

Posting

- Automatically post fee bills to client files based on bills produced using ESI Billing.
- After posting firm and trust receipts, print deposit slips for one bank or for all banks.
- Specify the Tax 1 amount when posting firm receipts to unbilled disbursements (Canadian firms only).
- Press **F11** to activate your Windows Calculator if you need to do a quick calculation while in the fee billing program.

Checks

- All check payee fields have been expanded to 60 characters!
- The Firm Checks posting program enables you to store payees and addresses so that they can be selected next time. Payees are automatically stored for future use if you fill in the address field.
- Print firm/trust and accounts payable checks from the same check-printing screen.

General Ledger

- Cash-basis and modified cash accounting methods have been implemented.
- Search for general ledger accounts either by account number or by account description.

Backup and Restore features

- Create backups of your ESI-LAW data by specifying the name of the backup file and the location in which to save the backup file. This enables you to back up to a CD or other removable media.
- Restore ESI-LAW backups using the Restore Backup feature.

Menus and Screens

- Menus and screens have been re-designed for consistency; including standardization of screen layouts, screen sizes, button images and button locations.

Username and Passwords

- Instead of ESI user numbers (system environment variables), ESI-LAW now uses usernames and passwords to identify operators. This means operators can log into ESI-LAW using their own username at any workstation, and it also simplifies the process of adding new workstations to your network!

Export Client Files to your Microsoft Outlook® Contact List

- This standalone utility lets you export your ESI-LAW client database (by individual lawyer or for all lawyers) to your Microsoft Outlook Contacts list. You have the option of adding your ESI-LAW files to your existing Outlook Contacts folder or to a subfolder of

your Outlook Contacts folder.

Reprint Audits

- The Reprint Audits program enables you to view as well as print audits.

Month-end and Year-end Functions

- The Outstanding Check List, Check Register and Canceled Check Register reports can be printed with the option of including check details, including the client file number posted to.
- The Outstanding Check List, Check Register and Canceled Check Register reports can be added to the Automatic Report Runner.

Sortable Picklists

- Click on column headers in **bold** to order search screen contents by that field. For example, if you are searching for a client file in a posting screen, press **F5** to display a list of client files and then click on **Client Name** or on **Matter Description** to sort the list of files.

Date Formats

- ESI-LAW now supports dates in the formats month-day-year, day-month-year and year-month-day. Modify your date format in the System Parameters screen.

Amicus Attorney Interface

- The Amicus Attorney client file transfer interface has been simplified, and allows you to transfer files for all lawyers rather than for a single lawyer.

Province Code Conversion utility (Canadian firms only)

- Search existing client addresses for province names and set the province field accordingly. Use this utility if you have client files on which the province is included in the second or third lines of the address, instead of in the province code field.

Training and Technical Support

Links on the ESI-LAW main menu provide easy access to information on ESI-LAW training options and on Technical Support plans.

Website link

Log onto www.esilaw.com by clicking the link in the top-right corner of the main menu. Visit our website often to ensure your software is up to date!