

# ESILAW 2008.1 Release Notes



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## **General and Trust Check Requisitions**

Check requisitions eliminates the need to manually request general or trust checks from the accounting department by allowing users to enter their own checks (assuming they have access to the feature). Users with access to the function still cannot post or process checks entered. This ensures accounting can retain control of the check processing and printing process by reviewing checks before they are 'officially' committed as an accounting entry. Checks can be edited, posted, and printed by accounting/administrators at their discretion.

## **Check Payee Address Editing**

Check payees addresses can now be edited by selecting Lists > Payee Address (ESILAW menu) or File > Maintenance > Payee Address (Classic menu). Alternatively, you can edit payee addresses from the general or trust check entry forms by selecting the Edit Payees button. Payees are listed in alphabetical order by payee name to simplify finding existing payees in the payee list.

## **Memorized Transactions**

Memorized transactions, when enabled, will allow specific fields on data entry forms (i.e. check entry) to retain data you entered or selected based on the last transaction. This feature helps to eliminate keystrokes when entering batches of similar transactions.

## **Electronic Payment Entry**

If your firm deals with electronic payments, whether it be credit card payments from clients or electronic file transfers (EFT), you can now enter electronic payments in ESILAW using the check or receipt functions. You can also create unlimited electronic payment types to help you identify those electronic transactions on reports.

## **Bank Journal Report**

This new report provides a complete listing of all transactions for a particular bank account or all bank accounts. Using this report you can easily view account opening and closing balances, transactions such as checks, receipts, and journal entries for specified date periods and other related account details. The Bank Journal report can be run using a variety of reporting criteria.

## **Find – Search by Audit Number**

The Find function includes a new search by Audit Number feature, which allows you to enter an audit number and find the associated audit and audit details. Search results can be viewed and/or printed.

## **Open-ended Phone Number Format**

This release includes support for a new free phone number format, which allow firms to use international phone numbers without having to worry about formatting constraints when entering numbers. Existing phone numbers can be converted to the new free format by changing the System Setting for phone number formats.

## **Extension Fields for Telephone Numbers**

Telephone number extension fields are now available in Clients, Contacts, limitation diary, and A/P Vendors. Reports will also display extension numbers.

## **Holidays Added to Calendar**

Calendars will now display both American and Canadian holidays.

## International Date Formats

International date format settings are now available (MDY, DMY, and YMD).

## Enhancements and Bug Fixes

- AP Vendor Inquiry audit will display correctly if more than five digits.
- A/R Reminders invoice format has been updated.
- A/R Write-offs fixed to address error when the original G/L account numbers used are no longer valid or active.
- Bank Deposit Slips (general and trust receipts) now include firm name in header.
- Billing now displays a separate interest line added the statement of account section.
- Added spellchecker to Calendar (F7 key).
- Check Register and Cleared Check Register reports now show detail and client number.
- Clients and related programs now use a Business 1 and 2 phone number field.
- Client Information Sheet displays contacts from Contact file were added as well as completion date on limitation diary entries.
- Addressed problem with Client Inquiry printing balances for Trust Banks in the trust by bank section.
- Client labels use new default formats and conversions for new phone formats.
- Added option to closed file reports to print by client number. Fixed sort problem as well.
- Closing client files now allows you to delete a closed file in the closed file grid.
- Fee Billing > Reverse Bill will display a warning if a payment has been posted to a bill you are trying to reverse.
- Added option on Individual Lawyer Summary to include details printout, as well as "Current" and "Year to Date" selection options.
- Lawyer Listings can now be printed in order by invoice date.
- Changed all reports to print totals up to 99 million.
- Reverse Bills will now allow reversing of a split bill on a parent file if no A/R is billed to the parent (i.e. all A/R was posted to the child files).
- System Parameters now shows a memorized transaction tab with related options.
- Trust Checks overdraft will display based on balance as of the check date and will not include future date transactions in the amount of available funds. You can also bypass the overdraft message if editing, reversing or posting to multiple clients.
- Trust Listing includes a new option to suppress printing of the client name.
- Trust Receipt has been changed to print the full company name on client receipt. Users can also summarize total amounts of all receipts.
- Time edit lawyer rate field is now a pull down list.
- Trust Checks will now check for overdrafts if a pending trust transfer to pay A/R exists.
- Trust Listing by Bank report includes a new option to suppress client names and matter descriptions.
- Additional minor enhancements and bug fixes.