

# ESILAW 2008.2 Release Notes



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## Import/Export

This feature enables you to import and export client/matter and contact information to and from .csv or text files. Imported data is appended to your existing client or contact database and exported data is saved as a CSV (comma-separated values) text file, which can be opened using a variety of programs, including Microsoft Excel®.

- Automatically schedule imports and exports to occur at intervals ranging from once every thirty minutes to once every eight hours.
- Ideal for importing data from third party applications or exporting data for tasks such as mail merges.

## Document Management System

The feature enables you to quickly set up your own system of folders to organize files such as Word documents, PDFs, Excel spreadsheets, and images related to clients or matters. Documents can be managed from the Inquiry and Clients screens under the Documents tab.

- Create folders for clients, navigate between those folders, add documents, delete documents, or copy and move documents to other clients or matters using the various features available in the Documents tab.
- Manage documents using Windows functionality and folders within ESILAW will reflect your changes.
- Document management is a quick and easy solution to organizing all of your documents by client, without having to create folders each time you set up a new client or matter.

## Administration Surcharge

The Administrative Surcharge option allows you to automatically process a surcharge on client files when billing. It can be configured as a percentage of the fees on the bill, as a fixed amount per bill, or as a one-time fixed amount. The Administration Surcharge is only available in the US version of ESILAW.

## Enhancements and Bug Fixes

- Added a column in Active users to monitor the Import /Export utility.
- Added column to monitor Import /Export utility under Reset Users.
- Modified A/P Invoices error routine so that it will not update invoices multiple times if you have a system crash.
- Modified check register report to display AP rather than ZZ for AP checks.
- Set default option Exact Match to off when going into the Conflict Search screen.
- Changed format to right justify the client number and matter columns under the File Room Listing.
- Fixed error reported when printing Trust section after sorting by GL account number from the Trust tab.
- Addressed problem under Release Trust Requisitions where if a user double clicked on a transaction to edit, the transaction would disappear from the screen.
- Addressed problem under Retainer Transfer to Pay A/R.
- Disabled option to close ESILAW when viewing the System Balance Report on the screen
- New Case Management tab under System Settings to define the default document filing folder, changed names under Menu to refer to Standard or Classic
- Added Case Management settings under User Settings to define users default document filing folder if they are mapped differently than what is specified in System Settings.
- Added new Document tab under Inquiry and Clients if document tracking options are enabled under System Settings > Case Management.
- Added new Document tab in Time Tracker if new Case Management is accessing from Client Inquiry menu.
- Added Total Funds Deposited To All Trust Accounts During This Period under the Trust Administration Fee Report (BC Clients only).
- Fixed A/R Write offs error message (US only).

- Additional settings under the Billing tab to allow automatic charging of an Administration Surcharge (US only).
- Added option to bill an Administrative Surcharge when creating bills (US only)