

ESILAW 2009.4

Release Notes



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Outlook Export

- The new Outlook export tool replaces the current Outlook export and adds several new export features as well as an export timer. Using this tool you can export clients, contacts, appointments, and tasks to Outlook using a variety of options. This information can then be used in Outlook or transferred to mobile devices that connect with Outlook.
- The Outlook export is currently a one-way transfer that exports to Outlook only. It will overwrite existing entries that it has exported. We are currently developing a two-way transfer which will allow you to transfer information to and from Outlook.
- The integrated timer will allow you to export pre-selected information in the background eliminating the need to perform a manual export.

Payment Allocation Report

- A new Payment Allocation Report is available on the Reports menu. This report provides details of payments made to client accounts within a specified period. You can print it by lawyer, and for a specific client file, area of law and major client number range. You can also include payments made to a specific bank account or to all bank accounts.
- The report displays the details of each payment allocation, including the responsible, originating and working lawyers associated with the client file, the area of law and major client, the invoice number to which the payment was applied, the payment type and the audit number of the payment receipt. Fees are displayed separate from disbursements and taxes.

Other Enhancements & Bug Fixes

- Clients has been changed to show a different category for clients that are exempt from verification. Clients entered prior to the Identification/Verification date in System Settings will display as Pre Existing client.
- A new Identification/Verification option for contacts has been added.
- Transaction audits now show the lawyer distribution with multiple trust banks and multiple entries on the audit.
- You are now prevented from assigning the same contact to a client more than once.
- Fixed several issues related to entering firm receipts and unbilled disbursements.
- Trust now looks at life to date entries to determine if funds were available instead of to the date of the transaction.
- Create bills and print draft bills will now retain the values that were selected for the lawyer and major client.
- Fixed an issue related to disbursement transfers and TAF codes.
- User number is now appended to PDF reports when saving PDF files.
- Fixed issue with the Receipts Summary report not displaying the 'from date' correctly.
- File Room Listing report can now be run with Identification or ID Exception to illustrate which clients have been identified and those that are exempt from identification.
- Fixed space issues on the ID Exception report to allow for full matter description and full name and address.
- The header information on the File Room Listing - Identification / Verification report now shows home phone number.
- A/R Aging Report displays a new total level to show total amount of doubtful entries.
- A/R Exception report displays a new total level to show the total amount of doubtful entries.
- Corrected the printing of limitation dates for 1, 7, 30, 60 and 180 within the Limitation Diary.
- Added view option to Print Unprinted Audits allowing unprinted audits to be viewed on screen or printed to PDF.
- Lawyers/timekeepers now have the option to add monthly hours and fees as a budget amount.
- Lawyer Maintenance report has the monthly budget values added to it.

- You can no longer change general ledger accounts from posting accounts to header records if you have transactions from the prior year.
- The zip/postal code field on printed checks has been increased for A/P Vendors.
- Revised graphics on the Simplified menu to make pulldown menus more obvious.
- Fixed issue where Timetracker was not remembering the screen size.
- Fixed various error messages.