

ESILAW 2009.1 Release

Notes



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Reporting

Modifications have been made to all reports to improve date sensitivity. Reports will now check if the Date Closed, Date Last Active, or Date Last Credit is greater than the To date when generating the report. If applicable, closed file details will be included in the report calculations. Reports have also been modified so that matter-based systems will display separate Client and Matter columns.

Several reports now include the option to Suppress Zero Balances and Group by Inactive Lawyers.

Suppress Zero Balances

- Client Listing
- Client Listing by Major Client
- Lawyer Balance Summary
- Lawyer Activity by Area of Law

Group Inactive Lawyers

- Client Matter Summary
- Client Summary
- Lawyer Summaries
- Lawyer Balance Summary
- Lawyer Activity
- Lawyer Activity by Area of Law
- Lawyer Individual Time Summaries
- Billing Realization (summary page only)
- AR Aging (summary page only)
- Collection Realization by Billings (summary page only)
- Collection Realization by Receipts (summary page only)
- WIP Aging (summary page only)

Clients / Client Maintenance (Classic menu)

- Changed the Limitation Diary report so the report does not allow you to enter a limitation date earlier than 1980 or a date outside the allowable date range.
- Changes to the matter description will now apply to the conflict record. If you change the responsible lawyer or area of law it also change all related transactions.

Conflict Search

Several enhancements have been made to conflict searching and reporting.

- Conflict Search has been refined to improve conflict searching by adding a new option to search for 'Conflicts that Begin With' or 'Conflicts that Contain' the keywords used in a search.
- The Conflict report has been rewritten to improve readability.
- Searches for time, checks, and receipts now search closed files.
- When performing a quick name search on the conflict database it will now show lawyer initials and an area of law. Names can now be searched by last name, first name, and client name.
- Reports have been updated to group corresponding search types in order based on selections on the conflict search screen.

System Settings and Receipts Journal

Changes to the System Settings and Receipts Journal include a modification to the Cash Limit field. This feature is used to flag transactions exceeding the Cash Limit. The limit can be defined in System Settings, but defaults to \$7500 if no amount is defined.

The Receipts Journal has been modified to allow you to print the cash (CSH) receipt transactions posted as cash receipts (paytype = CSH). The report will also print an over limit flag if the amount exceeds the specified limit. Receipts posted prior to the release of this feature will not be flagged by the report.

General Ledger Reports - Drilldown Reporting and Excel Export

General Ledger reports include a new drilldown feature that allows you to drilldown on report totals to display the details that make up the totals. In addition, you can also export GL reports to several formats including Excel, RTF, and Word.

Create Bills

The Draft Bills and Final Bills tabs offer new report printing options that allow you to export bills to various formats including Word and RTF.

Client Level Lawyer Rates

Added the ability to set rates at the client level for a lawyer/timekeeper.

Auto Clear Checks based on Bank File (Canada)

Bank Reconciliation includes a new Get Bank File button, which allows you to load a .csv bank statement file and automatically clear checks, based on a cross reference of outstanding checks to those imported. This feature is currently compatible with CIBC and TD banks and additional banks may be added upon request.

Language Settings (Canada)

You can now set a language in System Settings or User Settings and specify English or French as your default language. The language setting can be set globally through System Settings or at the user level through User Settings.

Enhancements and Bug Fixes

- Modified the GL Operating Statement to address an issue with YTD calculations if printing for the prior year.
- Detailed Listings will now default to first GL account.
- Modified the Client Listing suppress zero balance option to not include closed files.
- The Client Summary report now includes time with hours and no amounts as well as time with amounts and no hours.
- Lawyer Individual Time Summaries reports have been changed to allow you to generate reports for different periods, not just the default month and fiscal year.
- Bank Journals have been modified to increase the currency column to one billion dollars.
- The details statement in AR Reminders has been changed to use the System Settings for company name and address.
- Client Labels have been modified to refine the exact match when a range is specified. For example, a search for client labels 21001 to 21027 will no longer include 21001C to 21027C.
- Clients and contacts formatting for Canadian postal codes is now correct.
- A new option to 'suppress zero balance invoices' is now available in the AP Register. The 'suppress zero balance invoices' check box is only available if the user chooses 'Unpaid' invoices in the AP Register. If the 'suppress zero balance invoices' check box is checked then the 'Group By' option will sort by the invoice numbers.
- Inquiry > Trust details has been modified so audit numbers up to six characters are easier to read.
- Modified rebuild indexes to speed up processing for firms with a significant number of transactions.
- Added a link to all navigators to allow users to access the web-based knowledgebase.
- Added a link to all navigators to display product and service vendors in the legal vertical that are ESI partners.