ESILAW 2009.2 Release Notes

Inquiry and Timetracker

- Client notes features redesigned to allow entries with a Date/Time/User Stamp and to allow printing of notes
- Timetracker includes a new Notes button on the toolbar to allow access to the Notes feature
- Timetracker now allows maximizing and minimizing of the time entry window

Identification and Verification (Canada only)

Law societies across Canada are introducing a new set of rules requiring law firms to identify and verify new clients. To help firms manage identification and verification we've added several new features to ESILAW 2009.2, which will allow you to easily manage the process of collecting information used to identify and verify clients. Using 2009.2 you can enter details such as occupation, individual ID or business ID, mark clients as pending, identified, verified, or exempt, attach electronic copies of documents to files, and produce related reports.

- Set up clients as individuals or businesses
- Track required information based on client type
- Set pending, identified, verified, or exempt status
- View client status on-screen
- Scan and attach related documents to clients
- Produce client status reports
- Prevent trust transactions where applicable