

ESILAW 2009.3

Release Notes



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Document Assembly (Create Documents)

The Create Document feature allows you to merge client and contact data fields into Microsoft Word templates. Using Create Documents you can easily populate forms, letters, legal documents, and other types of documents with your client information. Create Documents includes several supporting features listed below.

- Create Document Template – used to add client and contact fields to your Word templates.
- Edit Document Template – used to edit existing Word templates with client and contact fields in them.
- Merge Fields List – displays a list of client and contact merge fields in Word.

Simplified Menu

A new Simplified menu has been integrated with the purpose of simplifying the interface for users. It combines the original 12 navigators into 4; Daily Activities, Accounting, Reports, and Month/Year-end. Each navigator displays the most commonly used features and a pulldown menu next to those features (where applicable), with access to secondary or less commonly used features. Using the Simplified menu most users can perform the majority of their work from the Daily Activities Navigator. The menu also offers enhancements such as tooltip help on icons and menus.

To use the Simplified menu select it from the Menu pulldown in System Settings and restart the software.

Help

Help has been modified to include references to the three menu selections that are available; Simplified, Standard, or Classic. When you search in help you will now see a reference at the top of each section with the location of the feature in all three menus. For example, a search for Time Entry will display the following;

- Simplified menu - Click Daily Activities, Enter Time
- Standard menu - Click Time, Enter Time
- Classic menu - Click Posting, Time Entry

Minor Enhancements and Bug Fixes

- Fixed issue related to the resizing and maximizing of windows.
- Increased the length of the Occupation field in Contacts.
- Addressed issue with performance relating to label printing and load times.
- Increased spacing on Reports Navigator on Simplified menu.
- Fixed issue related to Inquiry drilldown and transaction audits.
- Fixed issue with Print Check Default not defaulting to on when set in System Settings.
- Modified Operating Statement to address issue with truncation of the last column on specific printers.
- Additional minor enhancements and bug fixes.