2010.1 Release Notes

More Reports with Drilldown

We've added the ability to drilldown on report balances to additional reports. In the previous version drilldown was only available on G/L reports. It has been expanded to include client, lawyer, work-in-progress, and trust reports. Using drilldown you will be able to find information faster and easier as you can quickly drilldown on most balances and totals to view the underlying details.

Below is a list of reports that currently offer drilldown.

- Client Listing
- Client Listing by Major Client
- Matter Summary
- Client Summary
- Lawyer Summaries
- Lawyer Balance Summary
- Lawyer Activity
- WIP Aging
- WIP Exception
- Client Activity
- Trust Listing
- Trust Listing by Bank
- A/R Aging
- A/R Exception
- Trial Balance
- Operating Statements
- Balance Sheet
- Detailed Journal Listing
- Transaction Listing
- Term Trust Listing
- Individual Lawyer Time Summary

Run More Reports Using a Major Client Filter

Major client codes are codes that can be set up and assigned to clients in order to group them on reports and extract specific information for that group. In this release additional reports include the major client filter, which you can set when making your report selections.

The following reports can be run using a major client filter.

- Client Listing by Major Client
- Matter Summary
- Client Summary
- Billable Time by Lawyer
- WIP Aging
- WIP Exception
- Trust Listing
- Payment Allocation
- A/R Aging
- A/R Exception

Custom Fields

A new custom fields feature called My Fields has been implemented to allow you to create and manage up to 180 custom fields for clients. Custom fields are ideal for entering and tracking additional client information as they display in Clients and Inquiry, print on the Information Sheet, and can be output to documents using Create Document. A summary of the My Fields features is outlined below.

- Create and manage up to 180 custom fields.
- Custom fields can be added, changed, or deleted while users are in the software.
- Access to managing custom fields can be restricted by administrators.
- Information can be entered into custom fields by selecting the My Fields tab in Clients (Client Maintenance).
- Custom fields display in Inquiry under the My Fields tab and also print on the Information Sheet.
- Merge custom fields into documents by adding them to a document template and using Create Document.

A/R Ledger Report

A new A/R Ledger Report, similar to the ledger printout in Inquiry, is available under the Reports menu. This report displays a ledger of accounts receivable transactions for a single client or multiple clients within a specified date range.

Export to Excel from Inquiry

Client Inquiry features a new Excel button on all print details windows to allow you to easily export transaction details to Excel. The export will include any transactions you have selected within the specified date range. Additional Excel exporting features on reports will be made available in an upcoming service pack.

Enhancements and Bug Fixes

- Resolved issue with DMY date format and long date settings in Windows.
- Fixed issue with printing draft bills in Create Bills where only the first bill would print if bills were printed from preview mode.
- Minor changes made for Windows 7 compatibility.
- Added new report viewer to several reports with enhanced functionality such as searching reports and page preview.
- Changed the report viewer export mode to only show common export formats such as PDF and Excel, where applicable.
- Fixed issue with variance display inaccuracy in Inquiry.
- Fixing reporting issue with WIP Aging and Client Summary reports where balances would not match if the responsible lawyer was changed.
- Other miscellaneous enhancements and fixes.