ESILAW 2010.2
Release Notes

Integrated Backup

The integrated backup feature has been modified to create compressed .zip backups with a date and time stamp, rather than a tempback.zip backup file for the current and previous day. This allows users to effectively restore a backup from any date as backups are no longer overwritten.

Backups are now located in the subdirectory named Backups in your installation folder. Please ensure you have sufficient disk space available on the hard drive if you are using the Automatic Backup feature as this feature will use additional disk space.

Automatic Receipt Numbering

Automatic receipt numbering, which can be enabled in System Settings, has been added. Receipt numbers can be set up to be driven by a single receipt book or multiple receipt books by selecting the Number Receipts by Bank setting in System Settings.

- Receipt number fields added to Enter Receipts/Retainers and Enter Trust Receipts.
- Prompt to print number of receipts added after the first receipt has been saved. The user specifies the number to print for all receipts in the current batch.
- A warning occurs if duplicate receipt numbers are being used.
- New settings in System Settings to enable/disable Automatic Receipt Numbering and to Number Receipts by Bank.
- Last Receipt # displays in G/L Accounts and Budgets for bank accounts.
- New fields added to Inquiry and reports to display receipt numbers where applicable.
- Ability to search by Receipt # in the Find feature.
- Receipt copies for the client have been modified to fix addresses, add Reference and Receipt # fields, and add General or Trust, depending on the type of receipt.

Reporting to Excel

The majority of reports now feature export to Microsoft Excel. When viewing a report you can select the Export Report button on the toolbar to access the Excel export feature.

- Multiple Excel reports can be exported from a single report.
- The format of exported reports has been modified from the original report format to ensure the data is in a 'usable' column format for accounting purposes.

Color Coding of Checks

Check colors can now be set in G/L accounts to match the actual check color. If used, the check color will change in Write General Checks and Write Trust Checks based on the bank you select. Colors can be selected using the standard Windows color picker tool.

Hide Reversals

The option to hide reversals in Inquiry has been added. By selecting the Hide Reversals checkbox all reversed transactions will not display in the grid for time, disbursements, trust, and accounts receivable. This also includes write-offs that were reversed. This option is driven by the user and the last setting is remembered if you exit Inquiry.

HST Update (Canada only)

Labels have been changed to reflect HST taxes. HST tax features that address calculations will be added to 2010.2.1 hotfix1, scheduled for release shortly after 2010.2.

Enhancements and Bug Fixes

- Revised password entry to not verify the username or password until the Login button is selected.
- The New button in Inquiry has been changed to Search and the function of the feature is now identical to that of the Search button in Clients. If Search is selected a client search picklist will display, similar to the function of the F5 key in the Client field.
- G/L Accounts and Budgets screen have been modified to improve the user interface. Budgets and balances, originally on the G/L screen have been moved to a secondary screen, which can be accessed by selecting the Budgets and Balances button.
- Quickfill has been modified to expand the length of Quickfill descriptions, which you can use in features that offer Quickfill (i.e. time descriptions field in Enter Time). The Quickfill button now displays text on the button rather than the icon to make the presence of the feature more obvious. Quickfill has also been added to appointment and task entry in the calendar.
- A Spellcheck button has been added to Enter Time and Timetracker. The original spellcheck feature was only in Timetracker and could only be accessed using a hotkey.
- Revised Getting Started walkthrough and Quickstart checklist to simplify features and improve user interface.
- The year-end password is now populated in the Password field in the Year-end screen to eliminate having to enter the password when running year-end.
- Post button is no longer active in Write Trust Checks if there are no checks to post.
- Fixed issue with Payee address not displaying in Pay Addresses maintenance.
- Fixed issues when using duplicate check numbers.
- Fixed issue with resizing of Inquiry to remember settings.
- Set Expand Description feature in Inquiry > Time to remember if the setting is toggled on or off by user.
- New pop-up 'Don't show this message again' message boxes have been added in various areas to provide additional information and instruction for new users.
- Fixed A/R mail merge.
- Automatic Report Runner has been changed to allow users to press ESC to cancel the printing of a report batch.
- A new Hide Reversals option has been added to Inquiry to allow you to easily suppress reversed transactions from showing or printing.
- The Case Management tab in Users Settings and System Settings has been renamed to Documents.
- Added lawyer/timekeeper name to the Lawyer and Timekeepers budgets screen.
- Revisions to System Settings to improve interface and hide unused fields.
- Standardized functionality of post and reverse A/R reminder interest.
- Modified Set Default Posting month to display the month name rather than a number.
- Changed labels in Create bills - Single Bill to Quickbill, Draft Bills to Pre-bills, and Final Bills to Bills.
- To improve consistency and clarification, changed the internal bill reference number field label from Bill # to ID and the actual bill or invoice number field label from Invoice # to Bill # throughout all screens and reports. A/P still displays Invoice # as the field label for accounts payable invoices or bills.
- Improved performance of conflict search and disbursement write-offs.
- Moved the Client Name Search button in Conflict Search to the left of the screen to prevent confusion between it and the general search button, which was directly above it.
- Increased the Description field length in Enter Receipts/Retainers.
- Added an option to include Phone/E-mail when running A/R Aging report. By default, this option is not selected. The report was revised as well to improve readability when run with the phone number and e-mail address option selected.
- Modified the reporting of various reports to improve readability.
- Fixed an issue with A/R Aging by Working lawyer reporting closed client files that should not have been included.
- Various user interface and cosmetic enhancements.