

# ESILAW 2011.1

## Release Notes

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### **Create Bills**

Create Bills has been enhanced to include an Adjust Bill screen on the Pre-bills tab, which adds several additional features to billing. The new features include;

- The ability to enter and adjust soft costs, which are entries posted directly to client A/R.
- The ability to enter and adjust disbursements.
- The ability to enter and adjust anticipated disbursements.
- A new automatic calculation for final bill totals that allow you to adjust the total fees or total bill and automatically calculate one or the other.

In addition, bills can now be exported in the Pre-bills tab to RTF in a format that is Word or WordPerfect compatible and allows for easier editing.

### **E-mail Bills and Statements**

A new E-mail Manager has been introduced, which allows users to e-mail Bills and A/R Reminder statements directly to clients.

- The E-mail Manager allows the user to manage queued bills or statements prior to e-mailing them.
- You can enter a default Subject and Body text for e-mails for both Bills and A/R reminders.
- Create Bills has been updated to allow you to e-mail bills through the new Email Manager after they have been printed or posted. After bills have been printed or posted in Create Bills, they are queued up for viewing in the E-mail Manager.
- A/R Reminders has been modified to automatically queue statements in the E-mail Manager after they have been printed.

In order to use the E-mail manager clients must have the E-mail Bills & Statements options set and have a primary e-mail address defined in Clients > Contacts.

### **Release Trust Transfers**

A new feature called Release Trust Transfers to Pay A/R has been added to allow trust transfers that pay accounts receivable to be put on a queue and released by administrators or assigned staff. Trust check numbers are now assigned to each trust transfer to pay A/R record on the transaction audit.

If you are using Trust Transfers to Pay A/R make sure that you use the release feature to print checks and not the Trust Check feature so that a proper audit trail is maintained.

### **Clients Tax Rates**

The Clients feature now allows tax settings at the client level. This effectively allows you to create bills for clients using different tax rates to account for out of state or out of province clients. For information on tax rules that apply to billing clients visit the government tax website or contact your state bar or provincial law society.

### **Invoice Journal report**

A new Invoice Journal report is available under the Reports menu. The Invoice Journal report provides an invoice listing for clients and includes information such as fees, taxes and disbursements. The Invoice Journal also includes the ability to drilldown on invoice amounts so that you can view the underlying details.

## **Limitation Diary**

The Limitation Diary has been updated to include new features:

- Limitation Code Maintenance has been added, which allows you to create and maintain custom limitation codes. The original codes of "O" and "A" (Other and Annual) are still available.
- Limitation Diary has been modified to allow use of custom codes.
- New Limitation Codes can use predefined descriptions and can populate reports based on custom dates that allow you to define a set number of days for the occurrence.
- A new stand-alone Limitation Diary entry form has been added under the Clients pulldown menu for quick access to entry of limitation dates or appointments. As a result, you no longer need to launch Clients to enter a limitation date or appointment.

## **Learning Center**

The Learning Center offers step-by-step tutorials that teach you how to use features in ESILAW. Clicking the 'Learning Center' link under the Help pulldown menu or on the sidebar will allow you to access the Learning Center on the ESILAW website. Note that Follow Me Help has been replaced by the Learning Center.

## **Login Change**

The login procedure has been modified to prevent users from logging in simultaneously using the same account on multiple computers.

Login now stores the computer name as well as the user login information. If multiple users attempt to login on more than one computer using the same login information they will receive a message box telling them that the user is already logged in on a different computer. Only an administrator or the original user/computer can reset the login.

## **ICBC Allegient Task-Based Billing (Canada)**

The new ICBC LEDES and Allegient task-based billing is now available as an add-on module for customers in British Columbia. Please contact sales at 1.888.663.4545 for further information regarding this product.

## **Alberta Law Society Export (Canada)**

A new export tool that exports data for auditing purposes is now available for Alberta clients.

## **Enhancements and Bug Fixes**

- The Documents feature has been updated to allow you to attach most files types.
- Amended the restore from backup from displaying the wrong directory if you logged into another version of ESILAW.
- Modified A/P Checks so that reversing is possible if re-using old check numbers.
- Modified A/P Register to allow you to select by invoice or by audit, similar to reversing a Fee Billing and Firm Checks.
- Bank Journal Listing has been amended so that it now shows half journal entries that have been made to bank accounts.
- Addressed an issue in Inquiry with incorrect values when a check was reversed.
- Various other enhancements and bug fixes.