ESILAW 2013.1.0
Release Notes

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<u>New for 2013</u>!

- ESILAW Lawyer Desktop
    - Added a Snapshot feature on the toolbar in Lawyer Desktop to allow lawyers and timekeepers to view their own month-to-date and year-to-date figures and corresponding budgets. To use this feature a user account must have a lawyer/timekeeper associated to it, which is set in the ESILAW User Accounts feature. The Snapshot report is based on the Lawyer Balance Summary report in ESILAW, with the reporting options removed to simplify it and prevent users from viewing reports for other lawyers or timekeepers in the firm.
    - Snapshot provides users with the option to select the current or previous month for the report generation, which will display current or previous month-to-date and year-to-date figures based on the selection. The purpose of the current and previous month function is to allow a user to view the previous month and year-to-date figures in the subsequent month after adjustments have been made to billable hours and so forth.
- Electronic Funds Transfer (EFT)
    - Implemented EFT features in ESILAW to allow for proper recording of EFT numbers up to 20 digits or characters. You can now enter EFT numbers in general checks, trust checks, general receipts, trust receipts, and retainers to record EFT transactions.
    - EFT is integrated with the Payment Type feature. When EFT is selected as the payment type in the above notes features, the EFT # field will accommodate longer alpha/numeric entries, which is common for EFT numbers.
    - Reports such as Check List, Check Register, and Bank Journal have been modified to increase field lengths for EFT numbers that have been entered.
    - EFT transactions entered using the General or Trust Check features will not queue up in the check printing program.
- Bank Reconciliation
    - Added the ability to maximize the Bank Reconciliation Clear Checks & Deposits screen and the ability to drilldown to the audit to view related transaction details.
    - Accommodates the new EFT transaction number length so EFT numbers can be easily viewed in Clear Checks & Deposits.
    - Added an Audit number column to the Deposits & Other Credits grid in Clear Checks & Deposits.
- Import Balances (for New Firms)
    - Add a new feature under the File > Import/Export menu to allow new firms to import balances for time, disbursements, trust, retainers, and accounts receivable from .csv or Excel files.
- Conflict Search and Conflict Report
    - Modified the Conflict Search feature to search clients/matter and contact notes.
    - Changed the Conflict Report to use a new report viewer, which has additional features such as searching within the generated report, exporting to PDF, and so forth.
- Other Charges (applies to Canada only)
    - Implemented Other Charges features for all provinces to allow for use of Other Charges when billing and to group Other Charges in the appropriate section of bills. In order to use this feature you will must set disbursement codes as Other Charges and modify your billing templates to display the Other Charges section. This feature is designed for both word processing billing and Create Bills features in ESILAW.
- Additional Enhancements and Bug Fixes
    - Clients/Matters feature can now be maximized in order to easily view more information on the screen.
    - Bill of Costs is now exportable to Excel.
    - Performance enhancements to the Create Bills feature to speed up generation of large volumes of bills.
    - Changed the Inquiry export to Excel feature to include disbursement code and transaction type when exporting disbursements to Excel.

- o Updated the Lawyer Balance Summary report in ESILAW and Lawyer Desktop to include budgets.
- o Fixed issue with Lawyer selection resetting when selecting any of the lawyer picklists in the Clients/Matters feature.
- o Fixed a .01 tax rounding issue in Create Bills.
- o Fixed an alignment issue on report displaying trust ledger client totals.
- o Fixed issue with Create Docs not working with Office 2013.
- o Fixed issue with editing shared tasks in the calendar.
- o Added e-mail address to the Accounts Receivable Aging detail report.
- o Increased field lengths for client name, mail to name and conflict names from 60 to 120 characters. Note that the entire field may not display on all reports if you use up to 120 characters due to space limitations.
- o Changed labels on Lawyer/Timekeeper maintenance feature to clearly show monthly and annual budget input fields.
- o Fixed issue with the Find feature when selecting General Check (applies to US and International versions only).
- o Increased performance when drilling down on G/L report transactions.
- o Fixed issue with Cash Requirements by Client and Vendor reports displaying the incorrect invoice value for selected clients.
- o Fixed issue that allowed paying an A/P Invoice from an inactive bank.
- o Fixed error that could potentially occur when reversing A/P invoices.
- o Fixed issue with incorrect data in Excel export of the A/R Exception report.
- o Fixed issue with General Checks showing a receipt number on the Bank Journal report.
- o Fixed an error that occurred when clicking Need Assistance on the Bill of Costs report form.
- o Fixed performance issue related to generating the next available client number in Clients/Matters when the client/matter database files was extremely large.
- o Fixed issue with suppressing zero balances on the Client Listing report when hours are entered, but the amount is zero.
- o Improved speed of the Contacts feature selection screen for large contact databases.
- o Fixed issue with a record in use error that could occur when posting bills in Create Bills.
- o Modified sort order of time details in Create Bills to print the time details in date order.
- o Addressed issue with prior balance not displaying on a Statement of Account.
- o Fixed issue related to performance when reversing bills.
- o Addressed issue with Other Charges related to bills sent to the E-mail Manager feature (applies to Canada only).
- o Implemented Manitoba RST tax change (applies to Canada only).
- o Fixed issue with ICBC billing charging PST for billings after April 1st (applies to Canada only).
- o Changed XML files for ICBC e-billing to conform to new standards (applies to Canada only).
- o Integrated April tax update for BC to revert from HST to GST/PST (applies to Canada only).
- o Update error reporting feature to address issue with mail servers blocking incoming error reports.
- o Several additional minor enhancements and fixes to ESILAW and Lawyer Desktop.