Acclaim Solaria 3.95 Release

Bug Fixes

My Reminder Notes

- The "Note For" column of the My Reminder Notes window and the View Note window was missing its information. This has been fixed.

Categories & Types

- When copying rates to other templates or delivery types in the Product Pay Templates window, it was not always saving the correct pay type for each product. This has been fixed.

Attorney Maintenance

- Merging an attorney that has been used as a contact on an assignment was resulting in an error and would not completely finish the merge. This has been fixed.

Case Maintenance

- Merging a case that has commissions assigned to it was resulting in an error. This has been fixed. The case will now merge and move the commissions to the new case.

Assignments

- When opening an assignment that is in a different company than the current company, the title at the top of the options panel that shows the assignment number was not using the current language settings for the company's assignment name. This has been fixed.
- When selecting the list of contacts on the Assignment Details window, it was not including contacts that are assigned to a client. This has been fixed.
- If you enter a client and attorney on the assignment, then search for a contact and select one under a different client/attorney, then choose not to associate the contact with the current attorney on the assignment, it will now show the selected contact on the assignment.
- The label "Must Delivery By" was changed to "Must Deliver By".

Staff Assignments

- On the Staff Assignments window (and the Manager view of the calendar), the assignment count listed for each staff person on the calendar was correct, but the "Pages Due Details" window opened from here was missing assignments that were checked in but did not have a staff person selected on the check-in window. This has been fixed.

Orders/Invoices

- Typing over the client or attorney name and hitting enter instead of tab was searching for the client/attorney but also saving the existing client/attorney with the new name at the same time. This has been fixed so that no changes will be made to a client/attorney

record without using the Edit button, and it will not save the name field. (Names must be changed from the appropriate Maintenance window by privileged users.)

Invoices

- Once a client invoice was paid, it was not allowing you to scroll through the invoice charges. This has been fixed.
- For staff commission invoices that contained "Invoice Charges" for more than one client invoice, an error about duplicate items was showing when the invoice was saved. This has been fixed.

Transactions

- When creating a receipt and writing off the balance, the write-off invoice item and paid date was showing the current date, rather than the date entered on the receipt. This has been fixed.
- When creating a receipt and the Name is cleared out, a SQL error was being returned. This has been fixed.

Collections

- Sometimes invoices in collections were not completing the collection once the invoices were all paid or their balances were written off. This has been fixed. You can re-save invoices that are in this state to complete the collection it is in.

Reports

- The client and attorney "MS Word Merge – Address Labels" will now use the client or attorney's effective date when printing address labels for "New" clients/attorneys.

SQL Server Databases

- If two or more users inserted a record into the same table at the exact same time, the users would end up with the same record ID's in the user interface which could affect other records that get updated/inserted after that. This has been fixed.

Enhancements

Licensing

- The licensing and registration has been changed in Solaria. Each workstation will be required to have a runtime license assigned to it and a Product Code will no longer be required to turn off evaluation mode.

  Upon each upgrade, Solaria will register each workstation automatically with an available runtime license. If no runtime licenses are available, the workstation will run in evaluation mode.

- If a workstation is running in evaluation mode (because all runtime licenses are being used or there are none available), the workstation will continue to function as normal until more than 40 assignments are created. Once a database has more than 40 assignments in it, Solaria will run in view-only mode on that workstation.
- You can move a registration from one computer to another by unregistering a workstation that is already licensed. Select Help ▶ Unregister Acclaim Solaria… from the

main menu to remove the license from a workstation so that another workstation can be registered.

> Note: You will need to be connected to the Internet in order to register or unregister a workstation.

List Windows

■ All windows displaying a list of data (such as the Assignments List, Collections List, Client List, task lists, etc.) will now remember which line was selected if you leave the window. If you return to these windows using the "Back" or "Forward" buttons, the previous item will be reselected.

Company Maintenance

■ You can now assign a 2-character code to each company. This code will default to the first 2 characters of the company name. On windows and reports that allow you to include data for more than one company, it will now show this company code with the data instead of the first character of the company name.

Selectable Companies

■ On windows where there was an "All Companies" checkbox shown, this checkbox has been replaced with a "Companies…" link button. You will now be able to select one or more specific companies to use when viewing the data on the window.

Clicking on the "Companies…" button will display a list of all active companies in the database.
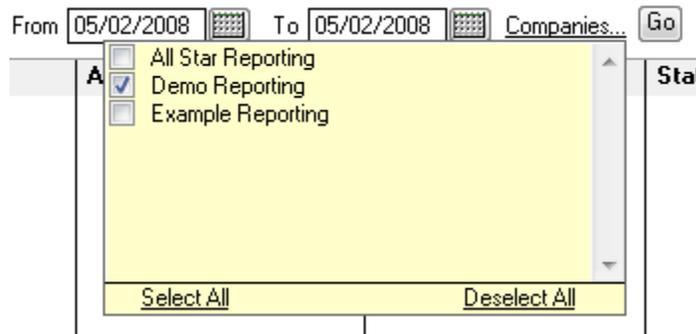
Select the companies you want to view the data for then click off of the window to close it. Where there is a "Go" button, you will need to click on the "Go" button to re-fetch the data for the new company selection.

The list of selected companies will be used by all windows that show the "Companies…" link, allowing you to set it once for all of Solaria. It will also be remembered the next time you open Solaria.

■ By default, the current company will be the only company selected. Changing the current company in Solaria will keep the selected company in synch if it is the only company selected.

■ The "Companies…" link button was added to the Orders, Invoices, and Staff Invoices list windows, allowing you to view the data for more than one company at a time.

■ Searches on the list windows will also use the selected companies, and allow you to change which companies are used on a search. (You will see the "Companies…" link button and "Go" button at the top of the window after you do a search.)

- Reports will now show the "Companies…" link button as well, allowing you to run the reports for all selected companies, except where noted.
- Note that the Collections window and report section will not show the "Companies…" link button if you are sharing client data across all companies. You will see all collections in the database in this case, since collections are per client.

Client Maintenance

- A separate user role privilege called "Name Changes" was added. Only users with this privilege (or a Master User) will be allowed to change an existing client's name. A client's name can only be changed on this window, not on any other client entry window.
- When doing a merge, you will now have the option to exclude the merging of addresses. Selecting the new "Exclude Addresses" checkbox on the merge window will prevent addresses from being moved to the new client. Only addresses that have been previously used on assignments, orders, or invoices will be moved. In addition, regardless of whether this new checkbox is selected, the merge will no longer move over expired addresses, unless they have been previously used.
- The Warning Text field has been lengthened to allow up to 60 characters in it.
- A "Commissions" tab was added to the window to list the staff who get commissions on the client.
- A "Files" tab was added to allow you to "attach" files to the client. The files will be copied to the file repository where assignment files are stored. When viewing orders or invoices for the client, the red "Remarks/Files" link button will display. Clicking this button will show you the files attached to the client where you will be able to open and view the files.

Attorney Maintenance

- A separate user role privilege called "Name Changes" was added. Only users with this privilege (or a Master User) will be allowed to change an existing attorney's name. An attorney's name can only be changed on this window, not on any other attorney entry window.
- The Warning Text field has been lengthened to allow up to 60 characters in it.
- A "Commissions" tab was added to the window to list the staff who get commissions on the attorney.
- A "Files" tab was added to allow you to "attach" files to the attorney. The files will be copied to the file repository where assignment files are stored. When viewing orders or invoices for the attorney, the red "Remarks/Files" link button will display. Clicking this button will show you the files attached to the attorney where you will be able to open and view the files.

Case Maintenance

- Only users will "Full Access" to Case Maintenance will be able to change the name of existing cases and deponents from outside of the Case Maintenance window (such as from the Assignment Details window.)
- A "Commissions" tab was added to the window to list the staff who get commissions on the case.

- A "Files" tab was added to allow you to "attach" files to the case. The files will be copied to the file repository where assignment files are stored. When viewing assignments, orders or invoices for the case, the red "Remarks/Files" link button will display. Clicking this button will show you the files attached to the case where you will be able to open and view the files.

Staff Maintenance

- A "Files" tab was added to allow you to "attach" files to the staff person. The files will be copied to the file repository where assignment files are stored. When viewing staff invoices for the staff person, the red "Remarks/Files" link button will display. Clicking this button will show you the files attached to the staff where you will be able to open and view the files.

Assignments List

- Two new columns were added to the Assignments List window:
  - "Location": Displays the city and state of the assignment location.
  - "Caller": Displays the person who called in the assignment.
- Four new search options were added to the Assignments List Search window:
  - "Caller": Finds recent assignments that were called in by a specific person.
  - "Assignment User Code": Finds recent assignments with a specific assignment user code selected on it.
  - "Service": Finds recent assignments with a specific service requested on it.
  - "Salesperson": Finds recent assignments where a staff person has received commissions on it or could receive commissions on it based upon the information on the assignment.

Assignments

- If a case on an assignment contains invoice remarks or file attachments, you will see a red "Remarks/Files" link button in the Case section of the Assignment Details window. Clicking on the button will show the invoice remarks and allow you to open and view the files attached to the case.
- If you attempt to change the assignment date to a future date, you will be prompted for a confirmation of this when the assignment is saved.
- After changing the Transcript Received date on the Deponent Update window, you will be asked if you want to update staff invoices that use this date. Choosing "Yes" will update staff invoice sent dates and due dates, even if they already have these dates set on them. Only the staff invoices that use a guarantee type that is based upon the transcript received date will be updated.

Orders

- The red "Remarks" button was changed to "Remarks/Files". The window will now show this button if the billing client or attorney have either invoice remarks or files attached to them.

Client Invoices

- The red "Remarks" button was changed to "Remarks/Files". The window will now show this button if the billing client or attorney have either invoice remarks or files attached to them.
- The red "Case Remarks" button was changed to "Case Remarks/Files". The window will now show this button if the case has either invoice remarks or files attached to it.
- If taxes are used on an invoice, and the tax rate selected only uses one of the four rates (federal, state, local, or other), it will print the name that you gave the tax rate instead of the standard name. In addition, it will only print the tax rate percentage next to the name if it uses the standard name. If you want the tax rate percentage printed on the invoice, include this in the name of your tax rate.

Staff Invoices

- The red "Remarks" button was changed to "Remarks/Files". The window will now show this button if the staff has either invoice remarks or files attached to them.
- If you change the Original Sent On date on a staff invoice, and its due date is based upon the transcript received date on the assignment, you will be asked if you want to update the transcript received date to match the new sent date on the invoice, and update all other staff invoices that use this date. Choosing "Yes" will update these automatically and recalculate the due dates on all staff invoices that base the due date on the transcript received date.

Collections

- You may now enter notes on completed collections. Solaria had prevented this in earlier versions.

Edit Log

- Printing from the Edit Log window will now print a report with the current list contents instead of doing a screen snapshot.

Reports

- You now have the option to select specific assignment types for the Assignments Scheduled report. This report will also print the client warning text on it in red text if there is warning information for the client on an assignment.
- The client address, salesperson, and invoice amounts were added to the Non-Requesting Attorneys report. You will also be able to specify the date range for the report, and whether or not to include the salesperson for each assignment. (Including the salesperson will be slower.)
- When running the Staff Payroll report, the report options window will now display the company that each staff person is in. This column can be sorted, allowing you to select all staff within a company for the payroll report.
- The Accounts Receivable report under both the Collections and Financial report types now has the option of sorting by client name (as it currently does) or by the client's balance due in descending order.
- The Assignments Scheduled report will now only include staff personal items for staff in the selected companies.

- A new report called "Statements with Client Invoice Information" was added to the Staff section of reports. It will print a simple, mail-able staff statement containing all outstanding invoices for each staff person. It will list the assignment date, case name, client invoices, amount billed to clients (for order items only), and the balance due to the staff person for each of their outstanding invoices.
- A new report called "Gross Sales Per Assignment Type" has been added to the Financial section of reports. You may select one or more assignment types then enter a date range, then the report will list the total sales revenue for each assignment type within the date range.

LEDES 98B Export

- When exporting invoices to the LEDES 98B format, it will now include the state code of the assignment location.