Acclaim Solaria 4.2 Release Notes

4.20b13 Patch Release

When using the "Map" link button on the Assignment Details or confirmations, it will now open your browser to the location in Google Maps. The old links using MapQuest no longer work. *[SD-143]*

4.20b12 Patch Release

When entering a new assignment, the Search button for the location was not opening the search window unless you switched to "In Conference Room" and back to "At Other Location". *[SD-129]*

4.20 Release

ENHANCEMENTS

DAVINCI MEETING ROOMS INTEGRATION

A new feature has been added to Solaria to allow you to integrate with Davinci Meeting Rooms! This feature allows you to find and book fully equipped meeting rooms instantly from the Assignment Details screen!

Prerequisites: This feature requires that Visual C++ 2008 Redistributable and OpenSSL are installed on your system. Visual C++ 2008 Redistributable will be installed automatically with the Acclaim Solaria installation. You will be prompted to install OpenSSL when you turn on this feature.

To use this feature, do the following:

1. Turn on the integration:
   a. Go to **Settings → Preferences** then click on the "Interfaces" tab.
   b. Click on the "Sign Up" tab. Your browser will open to a web page where you can sign up for the service and enter your payment information for all future meeting room reservations.
   c. Check "Integrate with Davinci Meeting Rooms".
   d. If the OpenSSL software is not installed on your computer, Solaria will walk you through the installation at this time. (This feature will not work properly if this is not completed.)
   e. Enter your username and password for the service. (All other fields can be left as is.)

System Preferences

| Company | Staff | Firms | Cases | Assignments | Orders | Invoices | Interfaces |

DepoManage ☑ Integrate with Repository

☐ Always Grant Access to Requesting Attorney

LEDES ☐ Integrate with LEDES 2000

☐ Integrate with LEDES 98B

Accounting Software ☐ Integrate with Great Plains

Davinci Meeting Rooms ☑ Integrate with Davinci Meeting Rooms

Need to Sign Up? [Sign Up]

API Website Address & Port [www.davincimeetingrooms.com] [443]

Login Name [bill@myreportingfirm.com]

Password [●●●●●●●●●●]

☐ Use Testing Mode

2. Search for meeting rooms on an assignment:
   a. After entering the date and time of the assignment, select the "Davinci Meeting Room" location.

Location   Map   Search

◯ At Other Location ◯ In Conference Room ⦿ Davinci Meeting Room

Room:
Address:

Cost: Times: Capacity:

   b. Click on "Search". Enter your search criteria in the search window.

c. Select an available meeting room from the list and click on "Select Room".

d. Review the meeting room information and select the services desired. When ready, click on "Reserve".

Davinci Meeting Room

Day Office at Denver Office Suites

1624 Market Street
Suite 202
Denver, CO 80202

Parking: Please park where available nearby. Rates vary.

Date & Time: 10/01/2015 8:00 AM to 10:00 AM
Capacity: 3
Room Cost: $ 40.00

Center Image

Select Services:
- [ ] Network Connection   (Hr:$0.00 1/2:$0.00 Full:$0.00)
- [✓] Wireless Internet   (Hr:$0.00 1/2:$0.00 Full:$0.00)
- [ ] Local Phone Access   (Hr:$0.00 1/2:$0.00 Full:$0.00)
- [ ] Catering Options   (Hr:$0.00 1/2:$0.00 Full:$0.00)
- [ ] Admin Time   (Hr:$0.00 1/2:$0.00 Full:$0.00)

Total Cost: $ 80.00   *Call **1-877-424-9767** for information or to make changes to a reservation.*

[Back to Rooms]   [Cancel]   [Reserve]

e. The meeting room information will be shown on the assignment details screen and will be reserved once you save the assignment.

You will receive email confirmations from Davinci Meeting Rooms for your reservations.

Note that canceling an assignment with a reservation will also cancel the reservation, which may have fees associated with it.

If you need to change dates, times or locations, you can use the Search feature again. Prior reservations will be canceled if you make a new reservation.

[SD-66]

MY SETTINGS

A new option called "Remember Search Criteria for Subsequent Searches" was added to the "My Settings" window. This option will be turned on/checked by default. This tells Solaria to open Search windows with the previous search criteria already populated in the fields on the search windows. Turning this off will open blank search windows each time. *[SD-79]*

PRINTED INVOICE FORMATTING

A new option for the format of printed (and emailed) client invoices is now available. Due to the increased number of fields being added to printed invoices, the format of the assignment and insurance information printed on invoices has been changed to use less boxes for less clutter. (Shown below with all field print options turned on.)

To start using this new format:

1. Select **Settings → Preferences** from the main menu.
2. Click on the "Invoices" tab.
3. Find the "Use new print format for invoices sent on or after:" field.
4. Enter a date for which invoices sent on or after will print with the new format.

System Preferences

All invoices prior to this date will print with the old format. (This will be blank by default which will print ALL invoices using the OLD format.)

Note: The old format will NOT print the new "Affiliate Job Number" and "Insurance Company" fields discussed below due to restricted space.

AFFILIATE ASSIGMENT NUMBERS

A new field was added to assignments if you need to track an assignment number for an affiliate. *[SD-88]*

This will be printed on the scheduling client's invoices if you turn this option on in System Preferences and are using the <u>new print format</u> (discussed above). (It will be OFF by default.)

To print this field on invoices using the new format:

1. Select **Settings → Preferences** from the main menu.
2. Click on the "Invoices" tab.
3. Check "Print Affiliate Assignment Number on Schedule Client's Invoice".
4. Be sure a date is filled in for "Use new print format for invoices sent on or after".

System Preferences

| Company | Staff | Clients | Cases | Assignments | Orders | Invoices | Interfaces |

Default Invoice Type: Partial Details (No Qty)
Default Invoice Terms: Due on receipt
☐ Lock Order Items After Invoice Sent
Printed Invoices ☑ Print Assignment Type w/Deponent
☑ Print Staff Name on Invoice
☑ Print User Reference on Invoice
☑ **Print Affiliate Assignment Number on Scheduling Client's Invoice**
Use new print format for invoices sent on or after: 10/01/2015
Print Due Date ⦿ Print "Upon Receipt"   ◯ Print Due Date

The new invoice format will print this field in the assignment information section:

Erat Ltd
2677 Laurel Lane
Lomax, TX 79782

Invoice #4711

Date	Terms
01/02/2015	Due on receipt

Assignment #47189 on 08/09/2014

Affiliate Assignment #: 12345
User Reference: 43927
Case: Susan Paro VS Choices

Order Shipped: 01/02/2015
Shipped Via: USPS Priority Mail
Staff: Oleary, Brian N

Claim Number: 06-6C41-433
Name of Insured: Jack Rutledge
Insurance Company: State Farm Insurance

Date of Loss: 03/12/2015
Adjustor: Jeffrey Smith
Phone: 720-123-8976

Description	Price	Amount
Original Transcript Meeting of Gary T Lawson		
Digital Signature	$ 2.50	$ 2.50
Original Transcript & One PDF Copy (66 Pages)	$ 6.75	$ 445.50

INSURANCE INFORMATION

An "Insurance Company" text field was added to the assignment insurance list for you to track the insurance company for a claim. You will also see this field when editing insurance information on an invoice.

Insurance Information

Claim Number	Insured Name	Adjustor Name	Adjustor Phone	Date Of Loss	Print On Invoice	Insurance Company
					☐	

[Add Line] [Remove Line]   [Cancel] [OK]

The Insurance Company field will be exported when you select "Send to Word" from the File menu. It will also be printed on client invoices when using the underline new print format (discussed above). [SD-93]

To print this field on invoices using the new format:

1. Select **Settings → Preferences** from the main menu.
2. Click on the "Invoices" tab.
3. Be sure a date is filled in for "Use new print format for invoices sent on or after".

The new invoice format will print this field in the insurance information section:

Erat Ltd
2677 Laurel Lane
Lomax, TX 79782

Date	Terms
01/02/2015	Due on receipt

Assignment #47189 on 08/09/2014

Affiliate Assignment #: 12345   Order Shipped: 01/02/2015
User Reference: 43927   Shipped Via: USPS Priority Mail
Case: Susan Paro VS Choices   Staff: Oleary, Brian N

Claim Number: 06-6C41-433   Date of Loss: 03/12/2015
Name of Insured: Jack Rutledge   Adjustor: Jeffrey Smith
Insurance Company: State Farm Insurance   Phone: 720-123-8976

Description	Price	Amount
Original Transcript Meeting of Gary T Lawson		
Digital Signature	$ 2.50	$ 2.50
Original Transcript & One PDF Copy (66 Pages)	$ 6.75	$ 445.50

TIME ZONES/CONFIRMATIONS

Time zones will now have a "Standard Offset" and a "Daylight Offset" so that Solaria knows the UTC offset for the time of an assignment. When opening Outlook appointments linked to emailed confirmations, it will now default the time of the appointment to match the time of the assignment but in your current time zone. (Time zones were also assigned to the states within the United States.) [SD-87]

COMPANY CONFERENCE ROOMS

- You can now add conference rooms to a company with the same name as conference rooms in another company. [SD-107]
- You can now enter a contact name and phone number for each conference room. This information will display on the assignment details and will be printed on the client and staff confirmations. [SD1130]

Location   View

○ At Other Location ● In Conference Room ○ Davinci Meeting Room

Room Room A

Occupancy: 12 People

Contact: Janet Owen   Phone: 970-970-9700

NOTES

The notes window, which can be resized as you desire, will remember what size and location you changed it to and will use that size and location next time you open it. This is remembered only during your session of Solaria; once you close and then reopen Solaria, it will default to its original size and location. *[SD-90]*

PAYING STAFF

The staff payments window was optimized for when you enter a staff name to search for all of their unpaid invoices. This will now take less time to pull up a large list of invoices. *[SD-85]*

REPORTS

Attorneys → Non-Requesting Attorneys: The assignment numbers has been added to this report. *[SD-95]*

DATABASE SCHEMAS

All tables in the database will be updated to use the dbo Schema if it was using the Acclaim schema.

A SQL Server Sequence object will be created and used by a new trigger for the Job table. This will prevent job numbers from skipping when restarting SQL Server.

ISSUES RESOLVED

HOME PAGE

The "Average Days to Receive Payments" statistic on the Home Page will now calculate correctly. *[SD-117]*

CLIENTS

Solaria will now properly update the address of a client if you remove an expiration date on an address. *[SD-110]*

CASES

When merging cases, you will no longer see a SQL error when it moves the attorneys to the target case. *[SD-114]*

COMPANIES

When adding a new company and adding a conference room at the same time, it will no longer return a SQL error. *[SD-102]*

SEARCHES

- When entering data into fields on the search window that do a lookup, but using the mouse to click OK before it has a chance to lookup the data, it will no longer automatically select a match and close the window. *[SD-101]*
- When using the "Clear" button on the Assignment and Invoice Search windows, it will no longer include an empty search on the Case User Reference field. *[SD-106]*
- When searching in the Attorney list window or Attorneys Present window for an attorney name containing an apostrophe, it will no long return an error. *[SD-115,121]*

LIST SORTING

When sorting on the assignment number, order number, invoice number or transaction number in the list windows and displaying records for more than one company, it will now sort by the number and disregard the company code displayed in front of the number for its sorting. *[SD-118]*

INVOICE LIST

- This list of invoices will now include invoices on assignments that did not have a case on it. [SD-124]
- If you use the "Sent" date radio button to search for invoices in a date range, then leave the list and come back, it will now remember this and set the search to use the "Search" button again until you change it. [SD-125]

STAFF INVOICE LIST

- If you use the "Sent" date radio button to search for invoices in a date range, then leave the list and come back, it will now remember this and set the search to use the "Search" button again until you change it. [SD-125]

TRANSACTIONS

When clicking on the payment icon on an invoice to show the payment in the Transactions list window, it was sometimes not showing the payment in the list, depending upon certain language settings used. This has been resolved. *[SD-108]*

INTEGRATION WITH DEPOMANAGE

When sending assignment information to DepoManage, it will now send the most effective address for a client (the address with the latest effective date that is not expired). *[SD-109]*

REPORTS

Staff → Payroll: When switching to use a cut-off date, then back to a date range, it will no longer show the end date that got removed when switching to a cut-off date. *[SD-99]*