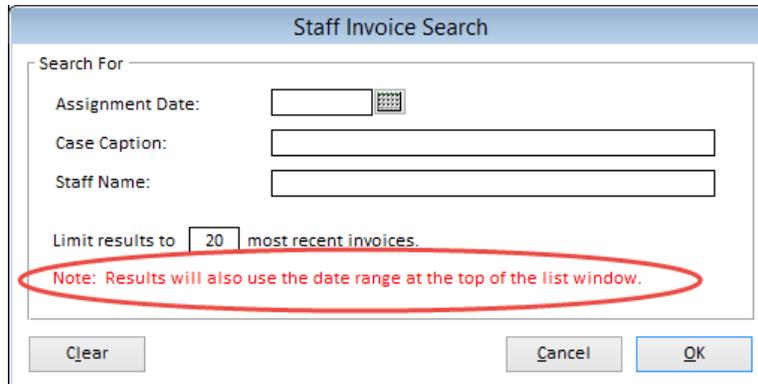


## 4.30 Build 17 Patch Release

### ENHANCEMENTS

A red warning message was added to the search windows for searches that now include the date range shown on the list window. [SD-223]



### ISSUES RESOLVED

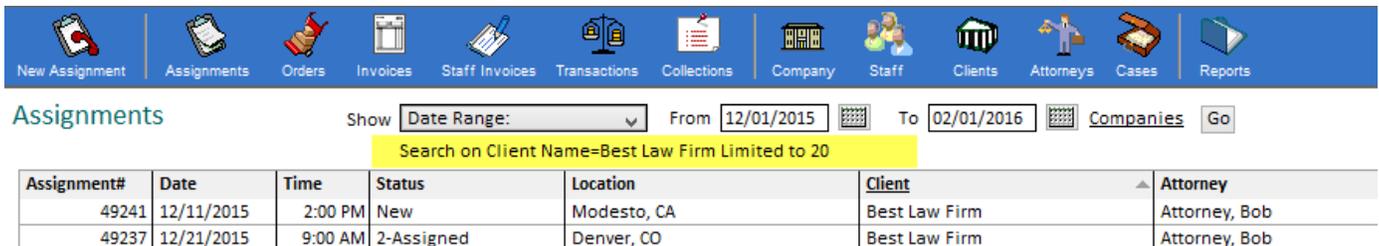
- Inserting a new staff person on the Staff Maintenance window will no longer result in a SQL error. [SD-222]
- Inserting a new attorney on the Attorney Maintenance window will no longer result in a SQL error. [SD-222]

## 4.30 Release

### ENHANCEMENTS

#### LIST WINDOW SEARCHING

Searching in the list windows will now allow you to use the date fields at the top of the list in conjunction with the search criteria. The date fields will still show on the window and the search criteria will be displayed beneath them. [SD-16]



Assignment#	Date	Time	Status	Location	Client	Attorney
49241	12/11/2015	2:00 PM	New	Modesto, CA	Best Law Firm	Attorney, Bob
49237	12/21/2015	9:00 AM	2-Assigned	Denver, CO	Best Law Firm	Attorney, Bob

### STANDING ORDERS

You can now enter a standing order for an attorney on the Attorney Maintenance window. There is a new tab called "Standing Order" that lists the active products. Check off the products that should be on the standing order and click "Save Changes" to create the standing order. Check or uncheck the products to change the standing order. [SD-131]

**Attorney, Bob**

Client: Best Law Firm

First Name: Bob Middle: Last: Attorney Suffix: Attorney#: 18363 Effective: 10/12/2015

Email: bobattorney@standard.com Birthday: 01/01/2000 Warning: Expires:

Phone Numbers: Direct: 303-123-9765 Mobile: Pager: Fax:

Override Defaults: Invoice?  Invoice  C.O.D. Invoice Type: Partial Details (No Qty) Invoice Terms: Due on receipt Order Template: Select One

Send Mailings  Charge Interest on Late Payments

General Invoice Remarks Commissions Files **Standing Order**

Description	Deselect All	Invoice Description	Product Type	Taxed
<input checked="" type="checkbox"/> CD Package		CD Package	Misc - Unpaid	<input type="checkbox"/>
<input type="checkbox"/> CD/DVD Copied as an Exhibit		CD/DVD Copied as an Exhibit	Misc - Unpaid	<input type="checkbox"/>
<input type="checkbox"/> COD Processing Fee		COD Processing Fee	Misc - Unpaid	<input type="checkbox"/>
<input type="checkbox"/> Conference Call		Conference Call	Misc - Unpaid	<input type="checkbox"/>
<input type="checkbox"/> Copy Condensed		Copy Condensed Transcript	Transcript - Copy	<input type="checkbox"/>
<input type="checkbox"/> Copy E-Transcript		Copy E-Transcript	Transcript - Copy	<input type="checkbox"/>
<input type="checkbox"/> Copy Hard Copy Transcript		Hard Copy of Transcript	Transcript - Copy	<input type="checkbox"/>
<input type="checkbox"/> Copy PDF Transcript		Copy PDF Transcript	Transcript - Copy	<input type="checkbox"/>
<input checked="" type="checkbox"/> Digital Signature		Digital Signature	Misc - Unpaid	<input type="checkbox"/>
<input type="checkbox"/> Document Copying		Document Copying	Misc - Paid	<input type="checkbox"/>
<input type="checkbox"/> DVD/Tape Stock Media		DVD/Tape Stock Media	Misc - Unpaid	<input type="checkbox"/>
<input type="checkbox"/> E-Transcript on a CD		E-Transcript on a CD	Misc - Unpaid	<input type="checkbox"/>
<input type="checkbox"/> E-Transcript Sent By Reporter		E-Transcript Sent By Reporter	Transcript - Copy	<input type="checkbox"/>
<input type="checkbox"/> Exam Under Oath		Exam Under Oath	Misc - Paid	<input type="checkbox"/>
<input type="checkbox"/> Exhibit Color		Color Copy Exhibit	Misc - Unpaid	<input type="checkbox"/>
<input checked="" type="checkbox"/> Exhibit Index		Exhibit Index	Misc - Unpaid	<input type="checkbox"/>
<input type="checkbox"/> Exhibit Multi-Format		Exhibit Multi-Format	Misc - Unpaid	<input type="checkbox"/>

Add Remove Merge Undo Changes Save Changes Current Balance: \$ 0.00 Print Statement Notes

To use this on an order, click on the "Standing Order" button link on the Order Items list of the Order window:

**New Order** Status: New Unsaved Changes

Attorney/Client: Select Existing Attorney / Client Repository Access:

Bill To: Client: Avant Garde Appraisal Group Attorney: Sykes, Esther E Address: Type: Mailing Address: 4522 Corbin Branch Road Chattanooga, TN 37421

Ship To:  Same as Billing Information Name: Sykes, Esther E Address: Type: Mailing Address: 4522 Corbin Branch Road Chattanooga, TN 37421

Shipping Terms: Delivery Type: 1 Normal Delivery Due On: 01/08/2015 Completed On: Print Type: Partial Details (No Qty) Shipping Method: USPS Priority Mail Shipped On: Tracking #: 1Z867A18YN00232276 Track

Deponent	Remove	Add	Product	Units	Unit Type	Qty
Ortiz, Heather E			Select One	0.00		0.00

Standard Order Clear List Same as Last Order Select Template

The products selected for the attorney's standing order will be added to the order item list automatically for each deponent on the assignment. (No changes will be saved on the order until you click "Save Changes".)

If you click on the button link and the attorney does not have a standing order, it will give you a message about this.

## SHIPMENT TRACKING

You can now track shipments on orders by entering a tracking number on the order. Then click on the “Track” button to go to the tracking website for the shipping method to view the status of the package. [SD-142]

**Order# 43739** **Status: Order Shipped - Invoiced**

Attorney/Client: Manning, Peyton / Big Bear Stores  Repository Access **Invoice #48688**

<p><b>Bill To</b> <span style="float: right; color: red; text-decoration: underline;">Remarks/Files</span></p> <p>Client: Big Bear Stores</p> <p>Attorney: Manning, Peyton</p> <p><b>Address</b></p> <p>Type: Mailing</p> <p>Address: 2145 Glory Road Wartrace, TN 37183</p>	<p><b>Ship To</b></p> <p><input checked="" type="checkbox"/> Same as Billing Information</p> <p>Name: Manning, Peyton</p> <p><b>Address</b></p> <p>Type: Mailing</p> <p>Address: 2145 Glory Road Wartrace, TN 37183</p>
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**Shipping Terms**

Delivery Type: 1 Normal Delivery Due On: 02/29/2016 Completed On: 02/25/2016 Print Type: Partial Details (No Qty)

Shipping Method: UPS Shipped On: 02/25/2016 Tracking # 12867A18YN00232276 Track

Deponent	Product	Units	Unit T
Dean, James	Copy E-Transcript	40.00	Page Rate
McCarthy, Paul S	Copy E-Transcript	35.00	Page Rate

Each shipping method will need to know the URL for the tracking website it needs to use. These will be entered automatically by Solaria if it can recognize the main carriers in your shipping method descriptions. You can find other URLs by using the “Click Here for Common URL’s” button at the top of the list.

**ShippingMethod**

Description	Remove	Add	Tracking Website URL	<a href="#">Click Here for Common URLs</a>	Active	System
DHL US Shipping			http://track.dhl-usa.com/TrackByNbr.asp?ShipmentNumber=		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email					<input checked="" type="checkbox"/>	<input type="checkbox"/>
FedEx			http://www.fedex.com/Tracking?action=track&tracknumbers=		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hand Delivered					<input checked="" type="checkbox"/>	<input type="checkbox"/>
UPS			http://wwwapps.ups.com/etracking/tracking.cgi?tracknum=		<input checked="" type="checkbox"/>	<input type="checkbox"/>
USPS Priority Mail			https://tools.usps.com/go/TrackConfirmAction_input?qt_c_tLabels1=		<input checked="" type="checkbox"/>	<input type="checkbox"/>
					<input checked="" type="checkbox"/>	<input type="checkbox"/>

## CLIENT INVOICES AND STATEMENTS

The “Print Affiliate Assignment Number on Scheduling Client’s Invoice” preference was renamed to “Print Affiliate Assignment Number on Scheduling Client’s Invoice and Statement”. It will now print the affiliate assignment number on client and attorney statements below the deponent names. [SD-127]

Big Bear Stores  
 2145 Glory Road  
 Wartrace, TN 37183

## Statement

Beginning Date	02/01/2015
Ending Date	02/29/2016

Beginning Balance	\$ 865.27
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Sent Date	Due Date	Invoice#	Assignment	Case/Deponent/Payment	User Reference	Amount
<b>Carol E Torres, ESQ.</b>						
11/26/2015	12/26/2015	48311	01/05/2015	Luther Shinn VS A. L. Price Ronald K Fernandez Affiliate Assignment #:123456	654321	\$ 470.25
						\$ 470.25
<b>Kamilah J Kay</b>						
02/17/2015	02/17/2015	48542	01/30/2015	Curtis Montes VS Bold Ideas James K Alonzo		\$ 703.20
						\$ 703.20

With this same preference, invoices will only print the affiliate assignment number label if there is a number entered on the assignment (when using the new invoice format). They will also only print on the scheduling client's invoice (not other client invoices on the same assignment). [SD126]

### STAFF INVOICES

Staff invoices will now show the "Net Profit" at the bottom of the invoice below "Total Invoices". It shows the difference of the total amount of client invoices and the amount due on the current staff invoice. [SD-136]

Amount Due:	\$ 697.55
<input type="checkbox"/> Less Paid:	\$ 697.55
<b>Total Due:</b>	<b>\$ 0.00</b>
Total Invoices:	\$ 1,087.50
<b>Net Profit:</b>	<b>\$ 389.95</b>
<input type="button" value="Notes"/>	

### ASSIGNMENT FILES

- Each file on an assignment can now be given a description and assigned to a deponent. This information will be uploaded with the file if you use DepoManage. [SD-153]

File Name	Open	Download	Delete	Add	Description	File Type	Deponent
C:\RepositoryNR\Sample 1 Document.txt					File 1	ASCII	Carter, John C
C:\RepositoryNR\Sample 2 Document.txt					File 2	ASCII	Select One
C:\RepositoryNR\Sample 3 Document.txt					File 3	ASCII	Carter, John C
C:\RepositoryNR\Sample 4 Document.txt					File 4	ASCII	Select One

- You can email files to attorneys, contacts and staff on an assignment directly from the Files window. Click on the “Email Files” button at the bottom left of the window. The following window will display allowing you to select the files and email recipients (those that have an email address in Solaria).

**Email Files**

**Select Files to Send** Select All

- C:\RepositoryNR\Sample 1 Document.txt
- C:\RepositoryNR\Sample 2 Document.txt
- C:\RepositoryNR\Sample 3 Document.txt
- C:\RepositoryNR\Sample 4 Document.txt

**Select Attorneys and Contacts** Select All

- Knighten, Betty D
- Wing, Steven M

**Select Staff** Select All

- Vue, Bret M
- Walsh, Jerry J

Cancel OK

Clicking on “OK” will open an unsent email message with the files attached to it and the email addressed to the selected recipients. You can enter your email messages and send from there. [SD-139]

## STANDARD REPORT TEXT

A new standard report text field called “Emailed Assignment Files” was added to enter the default text to put in the email message when emailing files from an assignment. Select **Settings → Standard Report Text** from the menu to get to this window. Be sure to select the company at the top of the window if you have more than one company. [SD-157]

Top of Emailed Payments	
Bottom of Rate Sheet	
Top of Emailed Rate Sheet	
Top of Emailed Repository Notifications	Your transcript and exhibits have been uploaded to our secure repository and are now ready for you to download. Simply click on the following link to access your files: <a href="http://www.demoreporting.com/Repository">http://www.demoreporting.com/Repository</a>
<b>Emailed Assignment Files</b>	Attached are the files for this assignment for your review. Please let us know if you have any questions about them. Thank you for your business! DEMONSTRATION REPORTING, INC.

Copy Text To... Undo Changes Save Changes

## ASSIGNMENT CHECK-IN

The “# Video Tapes” entry field on the Assignment Check-In window has been replaced with a “Video Orders” checkbox. This checkbox is used to indicate if any orders have video on them. Any existing assignments that have a count for video tapes will show this checkbox turned on.

## DEPONENT UPDATE

The “Tape Number” entry field has been replaced with a “Has Video” checkbox. This checkbox is used to indicate if there was video taken for the deponent. Any existing assignment deponents that have a tape number entered will show this checkbox turned on.

## STAFF MAINTENANCE

You can now enter more than one commission line on the Staff Maintenance window for a client, attorney, contact or case, as long as there are no overlapping date ranges. For example, you can enter a commission line for “Bob Attorney” for 01/01/2014 – 12/31/2014 and another line for the same attorney for 01/01/2016 – 12/31/2016. [SD-137]

## ORDERIDS AND STAFFINVOICEIDS

Orders and staff invoices will now use triggers on their tables in the database to ensure that the record IDs do not skip numbers when SQL Server is restarted. [SD-170]

## ISSUES RESOLVED

### CATEGORIES & TYPES

- When deleting a pay template, it will now display an appropriate message if the template has been used on an invoice and cannot be deleted. [SD-130]
- The menu named “Categories & Types” has been changed to “Categories and Types” to fix a problem with the shortcut key used for the menu. [SD-162]

### CALENDAR

The calendar will now fit on the width of paper when printed. [SD-154]

### ASSIGNMENT LIST

When searching for salespeople in the assignments list, it will no longer return an error. [SD-175]

### ASSIGNMENTS

- Assignments using an expired contact will now show the correct contact on the Assignment Details window. [SD-132]
- When integrating with DepoManage, the Assignment Files window will now properly download a file that has been “Sent to Repository” when you click on the “Download” button. [SD-161]

### CLIENT INVOICES

- When viewing a client invoice that has been overpaid, it will now show the status at the top of the window properly. [SD-185]
- When printing client invoices and an invoice has any line items that pay a unit price with three decimal places, it will now print the prices for just those line items with three decimal places. All other line items will print two decimal places for the price. [SD-141]

### CLIENT MAINTENANCE

When adding a new client using the Client Maintenance window, it will no longer return a SQL error. (This affected earlier versions of 4.30 only.) [SD-219]

## **MS WORD MERGES**

When using the “Send to MS Word” feature, it will now prompt you for files with both “.doc” and “.docx” extensions. [SD-156]

## **REPORTS**

The Staff History Report will now show the number of pages from the client invoices for the “Pages Paid” column if the staff get paid on a percentage of the client invoices. Also, the field label on the Report Criteria window was renamed from “Due Date Range” to “Assignment Date Range” to correctly indicate which date the report is using. [SD-134]