

5.00 Release

ENHANCEMENTS

INTEGRATION WITH SERVICELINK



This release of Solaria includes integration with the new Acclaim Legal ServiceLink™ portal now available!

ServiceLink is a web tool that allows your clients to do the following:

- Schedule Depositions
- Confirm Depositions
- Download Files
- Review their Orders
- Pay their Invoices

Reporters can use the tool to do the following:

- See their Schedule (includes mobile view)
- Confirm Assignments (includes mobile view)
- Check In (includes mobile view)
- Enter Turn-In Sheets
- Review their Invoices

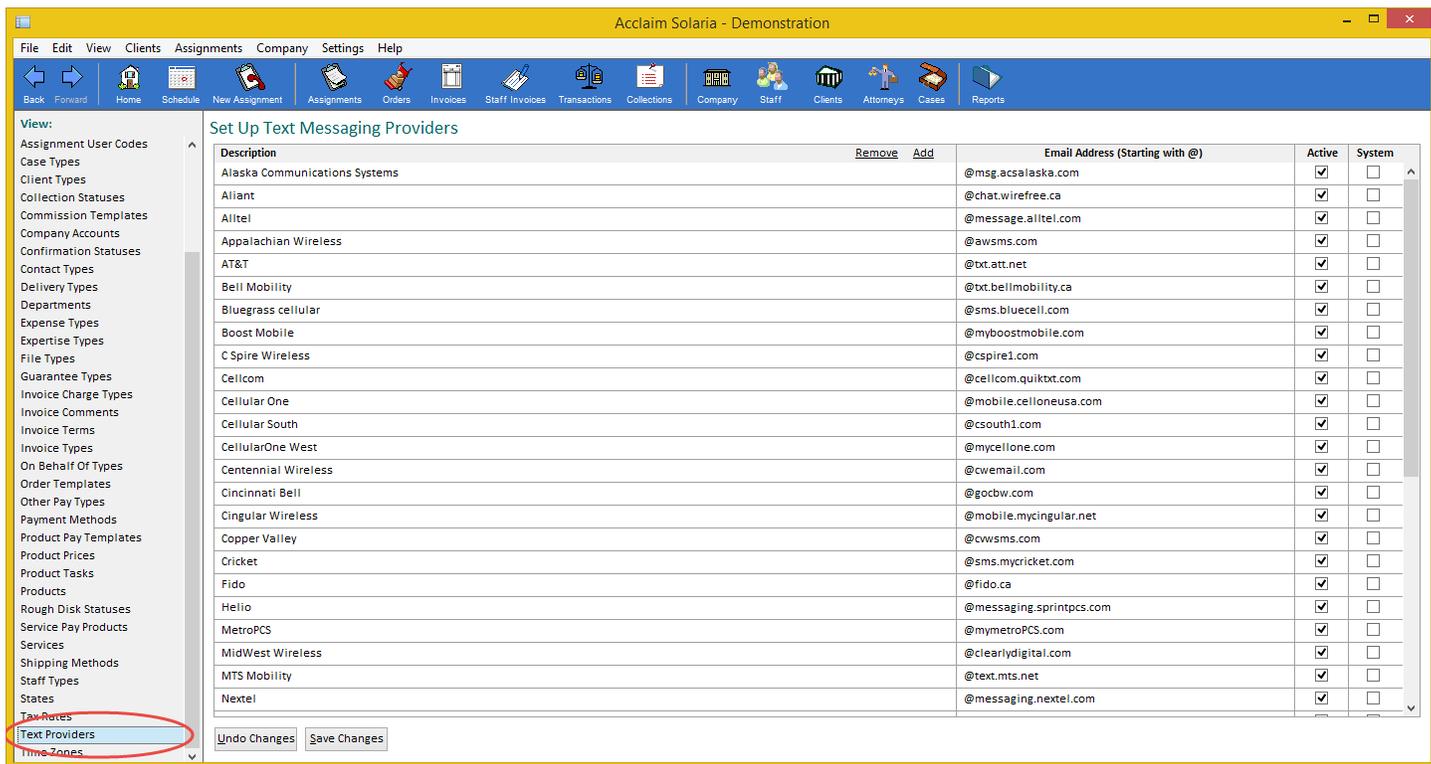
You can synchronize data between Solaria and ServiceLink for your clients and reporters to view and respond to. If you are interested in using ServiceLink, please call Acclaim Legal Solutions at 1-800-279-0244 for a demonstration. A separate user's guide is available to show how to set up and use ServiceLink with Solaria.

SEND MESSAGES TO REPORTERS

You can now use Solaria to send text and email messages to reporters (staff). You can send them messages from either the Staff List window or the Staff Assignments window for an assignment. A couple of set-up items need to be done first, as explained here. [\[SD-203\]](#)

TEXT PROVIDERS

A new lookup called "Text Providers" was added to **Categories and Types**. This is a list of current cellular service providers and the email address used by each for sending text messages to cell phones in their network.



STAFF MAINTENANCE

Assign text providers to each staff person on the Staff Maintenance window. This is found below the phone numbers. This must be entered in order for staff to get text messages on their phone; otherwise, they will only receive email messages.

Aker, Carol J

First Name: Middle: Last: Suffix:

Email: Hired On:

General | Invoice Remarks | Commissions | Files

Phone Numbers

Direct:

Mobile:

Pager:

Fax:

Text Provider: (highlighted with a red oval)

Guaranteed Pay

Type:

Non-Guar: Pay If Client Paid

Services

Realtime

Room Rental

Stenography*

Translation

Videoconferencing

Other Information

Department:

Staff Type:

SSN:

Tax ID:

CSR #:

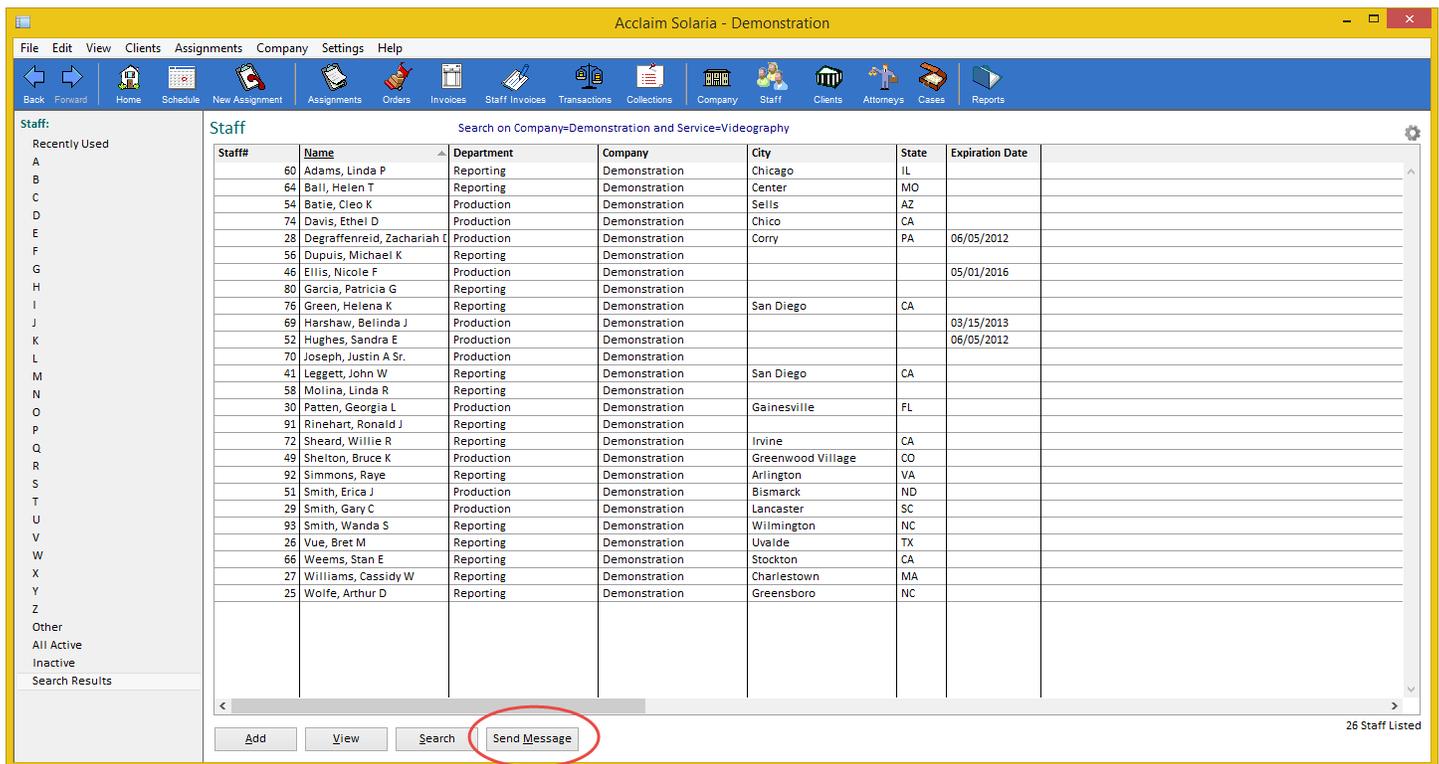
Invoice Type:

Type/Effective	Address
Mailing 11/11/2013 -	1936 Emily Drive Charlotte, SC 282

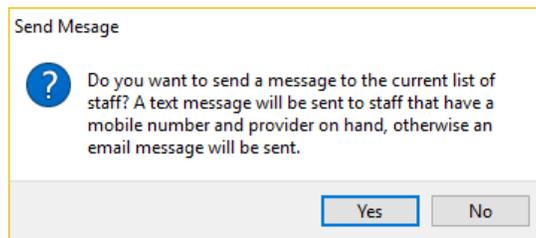
Assignment Type

STAFF LIST

A new button called "Send Message" was added to the bottom of the Staff List window.

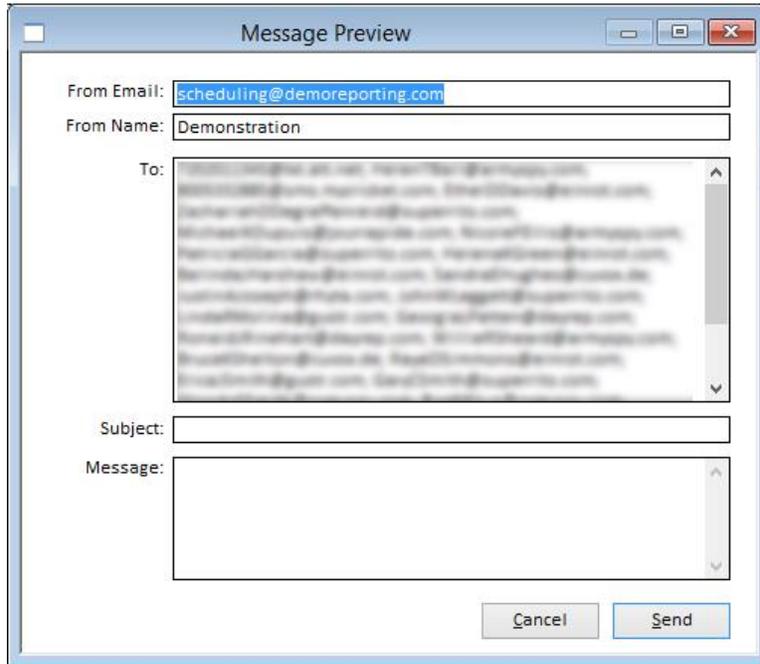


After using the list to find the staff you want to send a message to, click on the “Send Message” button. A confirmation message will display:



Click “Yes” to continue. It will find all staff currently listed with mobile numbers and providers entered plus staff with email addresses (if they don’t have mobile numbers or providers). If you are using Outlook, an unsent email message will display in Outlook with the “To” field populated with the numbers and emails found. Simply enter a short message and send from Outlook.

If you are using Simple Email, the following window will display:



It will show all mobile numbers and email addresses in the "To" field (blurred for privacy in the above screenshot). All fields are editable. Enter the text of the message to send, keeping it short as most phones may send multiple messages if a message is too long. Click "Send" to send the message.

STAFF ASSIGNMENTS

A new button called "Send Message" was also added to the Staff Assignments window when viewing an assignment.

Staff Assignments

Assignment Information

Client: Best Law Firm
 Attorney: Attorney, Bob
 Location: Pearl Street Apartments
 1367 Pearl Street #B1
 Denver, CO 80203

Assignment Date: 05/18/2016
 Start Time: 12:00 PM MT
 Estimated Length: 2 Hours
 Print Assignment Notes On Confirmations

Services	Assigned Staff	Confirmation Status	Confirmed On	Confirmed By	Can Take	Staff Note	Turn-In Sheet Completed
Stenography**					<input type="checkbox"/>		

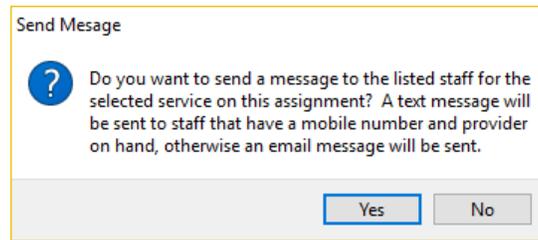
Auto Assign Send Message Assign to Service

Possible Staff to Assign to Selected Service: Show Any Available Staff Include Pages Due Pages Due Details

Name	7 AM	8	9	10	11	12 PM	1	2	3	4	5	6	7	8	9	10	11
Aker, Carol J																	
Bender, Jose P																	
Brantley, David R Jr.																	
Castile, Doris C Jr.																	
Chandler, Lois A																	
Chung, Catherine C																	
Culver, Pauline J																	
Decastro, Sarah R																	

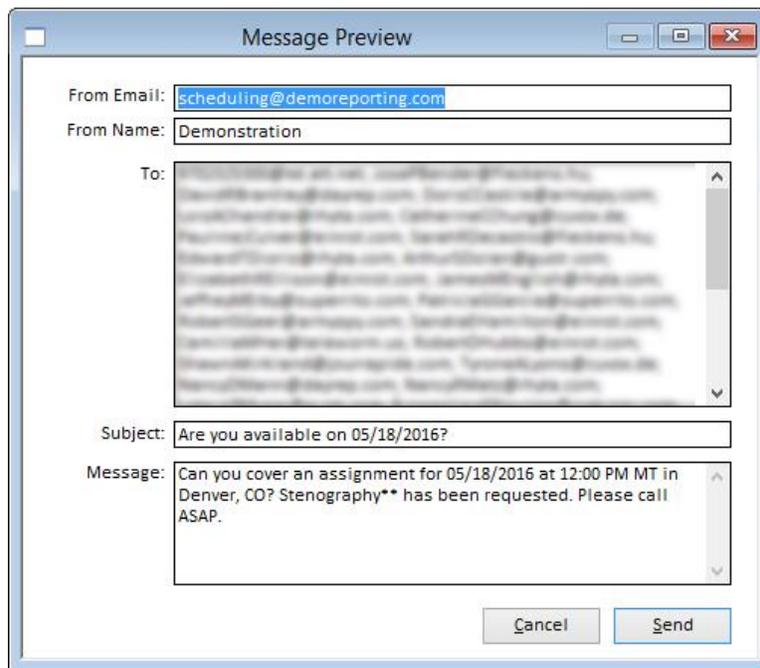
Undo Changes Save Changes Another assignment This assignment Personal time Synchron to ServiceLink Notes

Sending messages from this window or by service. Click on a service and choose the staff you want to send a message to for that service using the “Show” drop-down menu options. Next, click on “Send Message”. A confirmation message will display:



Click “Yes” to continue. It will find all staff currently listed with mobile numbers and providers entered plus staff with email addresses (if they don’t have mobile numbers or providers). If you are using Outlook, an unsent email message will display in Outlook with the “To” field populated with the numbers and emails found. The “Subject” and “Message” fields will be pre-populated with information about the assignment and service selected. Simply enter a short message and send from Outlook.

If you are using Simple Email, the following window will display:



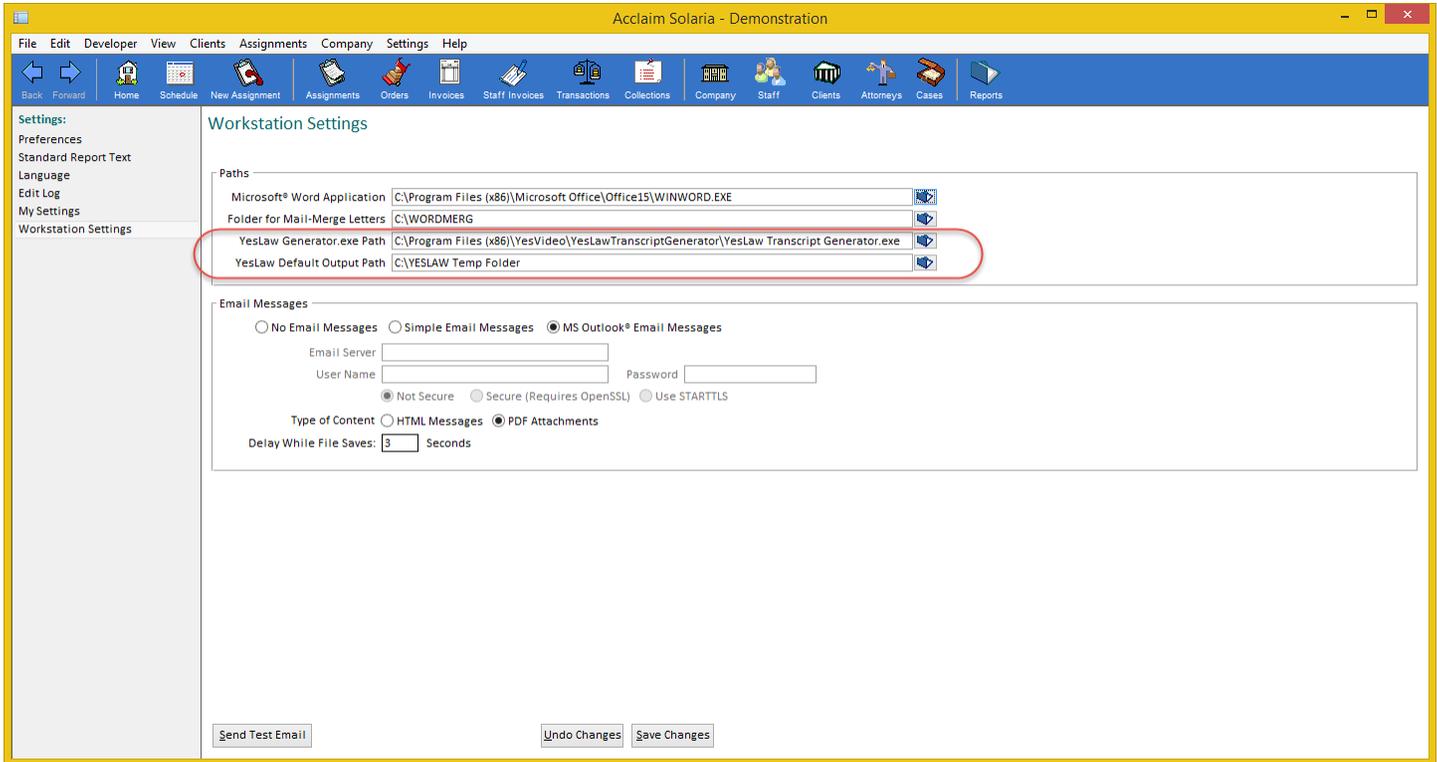
It will show all mobile numbers and email addresses in the “To” field (blurred for privacy in the above screenshot). The “Subject” and “Message” fields will be pre-populated with information about the assignment and service selected. All fields are editable. Enter the text of the message to send, keeping it short as most phones may send multiple messages if a message is too long. Click “Send” to send the message.

Note: You must have a valid “From Email” address in order for messages to be sent successfully.

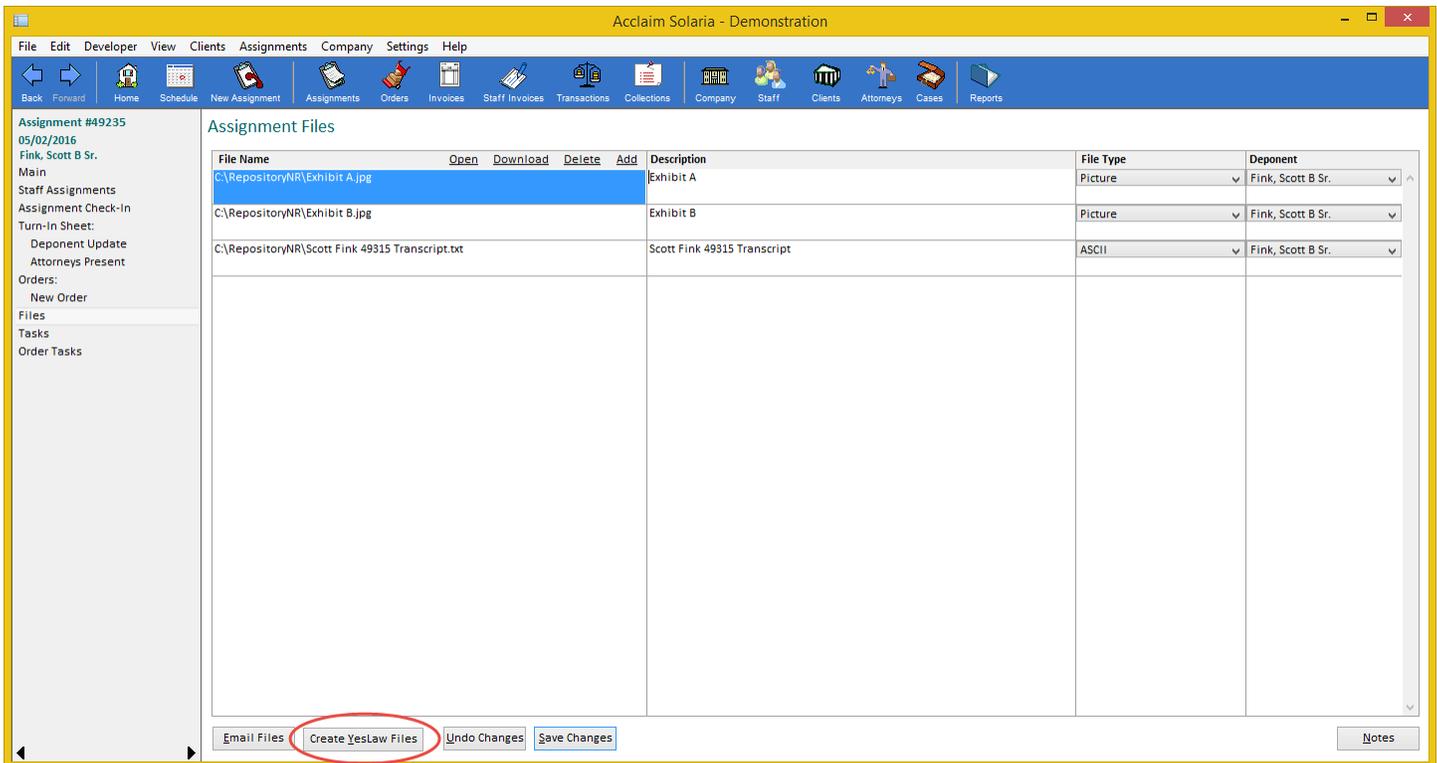
YESLAW TRANSCRIPT GENERATOR INTEGRATION

If you use YesLaw to generate files for production, you can now use it through Solaria to make this process simpler. [SD-166]

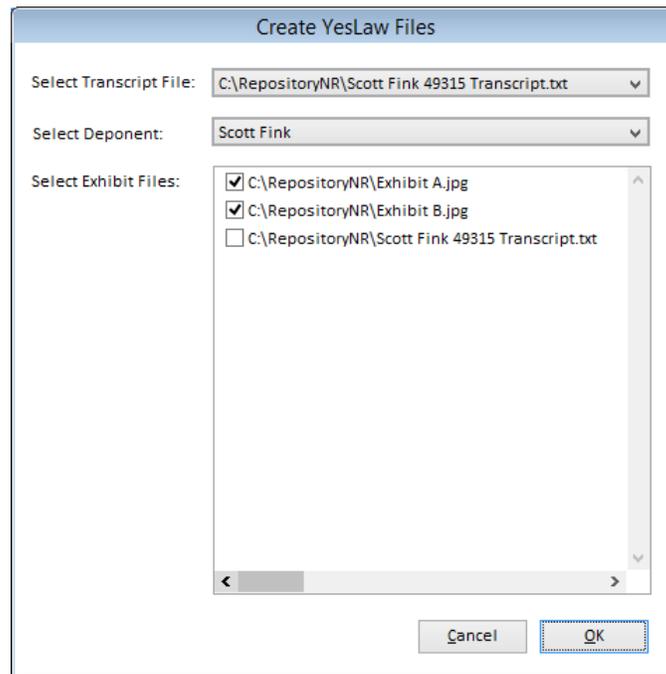
Enter the path to your YesLaw generator.exe file and a path for its output files in **Settings** → **Workstation Settings**. This only needs to be done one time per workstation.



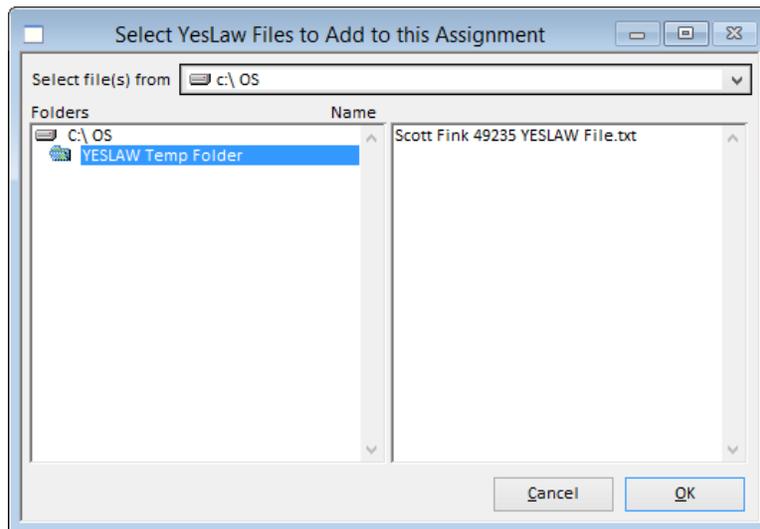
When viewing the Files window for an assignment, you will see a new "Create YesLaw Files" button at the bottom of the window.



After adding your transcript and exhibit files to the assignment in Solaria, click on this button.

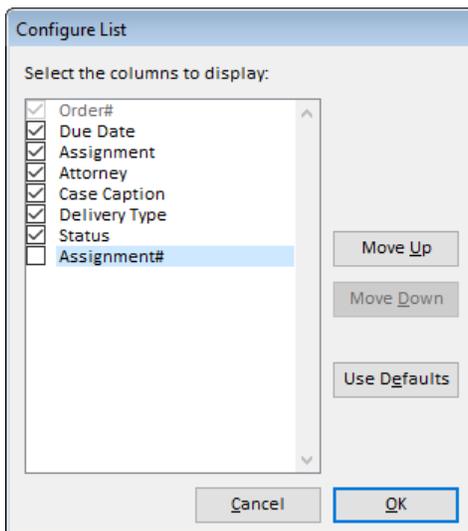


Select the transcript file, deponent, plus any exhibits you want to use with the YesLaw transcript generator and click “OK”. YesLaw will open with this information pre-filled. From here, you can make adjustments as needed and create the files. When finished, close YesLaw and return to Solaria. Solaria will prompt you to select the files that were created so you can add them to the assignment.



ORDER LIST

The “Assignment#” column can now be added to the view of the orders list window. From the Orders List, click on the cog icon  in the top right corner of the window. Check the “Assignment#” column in the Configure List window to show this column in the list. [SD-321]



ORDER SHIPPING INFORMATION

You can now enter a client plus an attorney or contact in the **Ship To** section of orders. [SD-242]

Ship To		Add	Edit
<input type="checkbox"/> Same as Billing	Client	Ace Associates	
	Attorney/Contact	Bulter, Annie T	
Address		Add	Edit
Type	Mailing		
Address	2347 Deans Lane Mount Vernon, NY 10550		

When you have **Same as Billing** checked, you will see the billing client, attorney and address shown in the **Ship To** section.

When you uncheck **Same as Billing**, you can enter a client name (or part of a name) to find an existing client to ship to. The Attorney/Contact list will show all attorneys and contacts for that client to select from, or you can enter the name of a person to search on.

Click on **Add** to add a new attorney or contact with a client. Click on **Edit** to edit the attorney or contact with the client.

You can still enter a name without a client attachment to ship to someone that does not need to be saved as an attorney or contact.

CLIENT CASE NUMBERS

You can now track the case numbers used by your clients so you can print their case numbers on invoices and refer to their numbers when talking to them.

ASSIGNMENTS

The "Client Case#" was added to the Assignment Details window. This will show any existing number for the scheduling client and case on the assignment. It can be entered or modified while entering an assignment using the **Add** and **Edit** buttons for the case. [SD-230]

Case List Assignments List All Select Add Edit

Case Caption: Cynthia Barber VS Body Fate

Case Type: Grand Jury

Trial:

Court Action#: 14-2-01148-0

User Reference#: 123123

Client Case#: 124-85943

The "Client Case#" was added to the Assignments List window. This can be hidden or shown using the Configure List feature by clicking on the cog icon  on the top right of the list. [SD-233]

Configure List

Select the columns to display:

- Assignment#
- Date
- Time
- Client
- Attorney
- Deponent
- Status
- User Reference
- Case Caption
- Delivery Type
- Assigned Staff
- Location
- Caller
- Web Request#
- Client Case#**

Move Up

Move Down

Use Defaults

Cancel OK

ORDERS

The "Client Case #" for the billing client and assignment case is now shown on the Order window. [SD-236]

Completed On

Tracking #

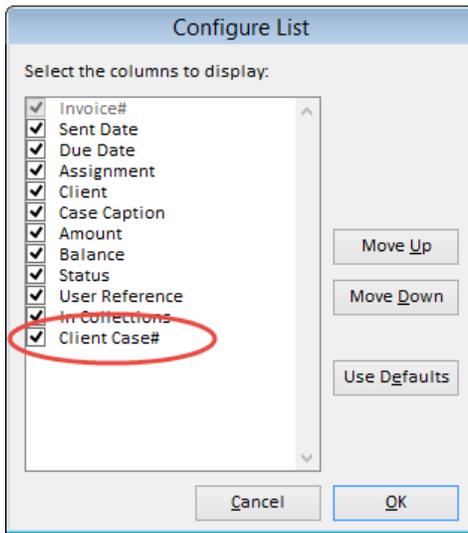
Print Type: Partial Details (No Qty)

Client Case# BEST-EARLHAWKINS

If no number is shown, you can enter a new number to save with the case for the billing client. Existing numbers can also be modified if they are incorrect.

INVOICES

The "Client Case#" was also added to the Invoice List window. This can be hidden or shown using the Configure List feature by clicking on the cog icon on the top right of the list. [SD-235]



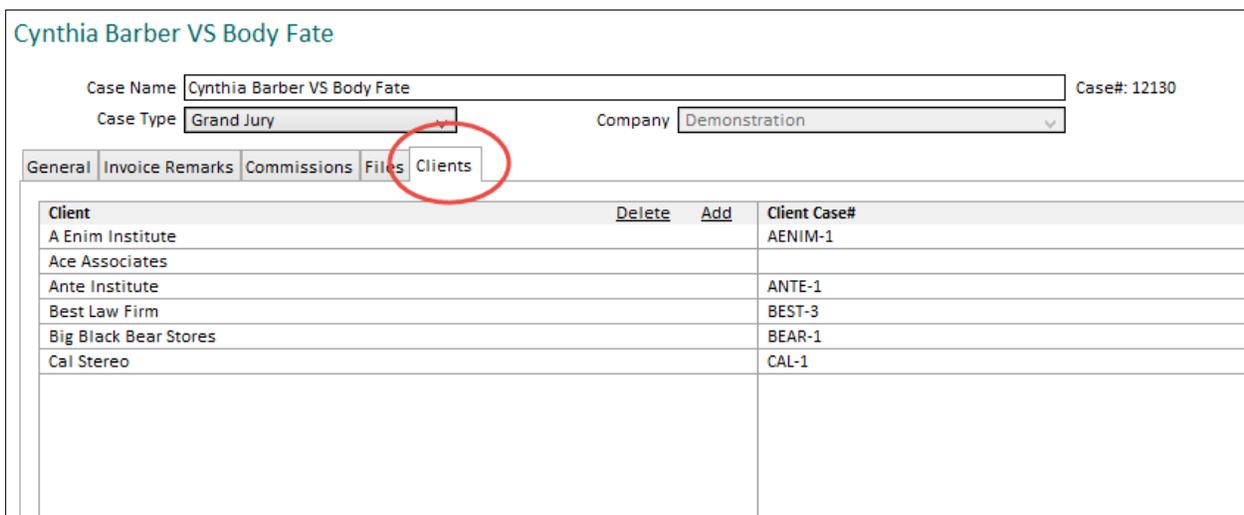
The "Client Case #" for the billing client and assignment case is now shown on the Invoice window. [SD-237]



If no number is shown, you can enter a new number to save with the case for the billing client. Existing numbers can also be modified if they are incorrect.

CASE MAINTENANCE

A new tab called "Clients" was added to the Case Maintenance window. It will list clients that have a case number for the case shown. [SD-231]



Modify existing numbers directly in the list.

Click on the **Add** button at the top of the list to add a new client and case number. Enter part of the client name and hit tab to look up the full client name.

Click on a list then click on the **Delete** button at the top of the list to delete a case number.

CLIENT MAINTENANCE

A new tab called "Cases" was added to the Client Maintenance window. It will list cases and their case numbers for the client shown. [SD-232]

Best Law Firm

Client Name: Best Law Firm Client#: 8901

Client Type: Law Firm

Warning:

Phone Numbers: Direct: 303-123-9765, Toll-Free: , Fax: 303-123-9766

Client 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, Do Not Send To Collections

General Invoice Remarks Collections Commissions Files **Cases**

Case	Delete	Add	Client Case#
Amy Ford VS Champion Auto			BEST-1
Betty Bloom VS Solid Future			BEST-2
Cynthia Barber VS Body Fate			BEST-3
Earl Hawkins v. McDade's			BEST-4
Gail Dean VS Castle Realty			BEST-5
Tammy Horn VS Record Town			BEST-6

Modify existing numbers directly in the list.

Click on the **Add** button at the top of the list to add a new case and case number. Enter part of the case name and hit tab to look up the full case name.

Click on a list then click on the **Delete** button at the top of the list to delete a case number.

REPORTS

The following reports will now print the Client Case# instead of the Case Billing Reference as these go to clients. [SD-238]

- Client Confirmations
- Orders
- Client Invoices
- Attorney, Client and Case Statements
- Receipts to Clients

LIST SEARCHES WITH DATE RANGES

When doing a search on a list window (e.g. Assignment List, Order List, Invoice List, etc.), you will now have the option to use the date range on the list window with the search results. Check the **Use Date Options on List** checkbox to use the date options with the search results. Uncheck this to get the latest records that match the search criteria. [SD-251]

Order Search

Search For

Assignment Date:

Attorney Name:

Deponent Name:

Use Date Options on List

Limit results to most recent orders.

STAFF LIST

You can now display the staff email address, direct phone number and mobile phone number in the Staff List window. Click on the cog icon  in the top right corner of the window and check the column names to add them to the list. [SD-293]

Configure List

Select the columns to display:

- Staff#
- Name
- Department
- Company
- City
- State
- Expiration Date
- Email Address
- Mobile Phone
- Direct Phone

NEW MS WORD™ MERGES

Two new MS Word merges were added: contact and deponent address labels.

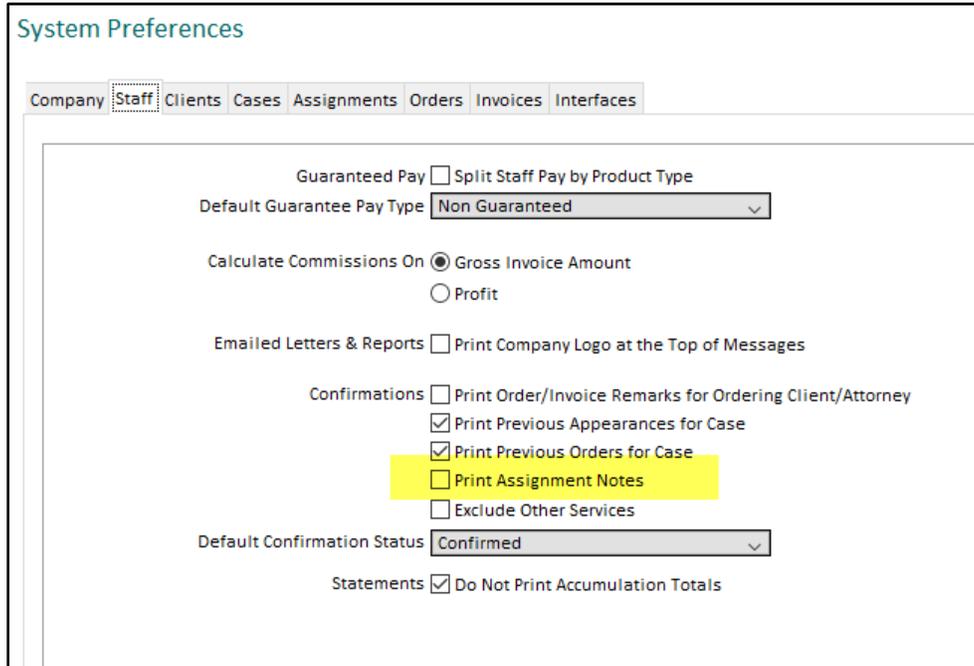
Go to **Reports → Attorneys/Contacts** to find the “MS Word Merge – Contact Address Labels” Word merge report. It will prompt you for the list of contacts you want to export, including all contacts, only contacts that were created since a date you specify, or only selected contacts. It will prompt you for the new Word files to use for this (CONTLBLS.TAB and CONTLBLS.DOC), which were added with the upgrade. [SD-206]

Go to **Reports → Cases/Deponents** to find the “MS Word Merge – Deponent Address Labels” Word merge report. It will prompt you for the list of deponents you want to export, including all deponents, only deponents that were created since a date you specify, or only selected deponents. It will prompt you for the new Word files to use for this (DEPNLBLS.TAB and DEPNLBLS.DOC), which were added with the upgrade. [SD-205]

You can find a copy of these files in your C:\WORDMERG folder (assuming you used a standard installation). Backup copies can be found in your C:\Users\[YourName]\AppData\Local\Acclaim Legal Solutions\Acclaim Legal\WORDMERG folder.

NEW SYSTEM PREFERENCE FOR CONFIRMATIONS

A new System Preference was added to default the "Print Assignment Notes for Confirmations" for staff confirmations.



The screenshot shows the 'System Preferences' window with the 'Staff' tab selected. The 'Confirmations' section contains several options, with 'Print Assignment Notes' highlighted in yellow. The 'Default Confirmation Status' is set to 'Confirmed'.

System Preferences

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

Guaranteed Pay Split Staff Pay by Product Type
Default Guarantee Pay Type: Non Guaranteed

Calculate Commissions On Gross Invoice Amount
 Profit

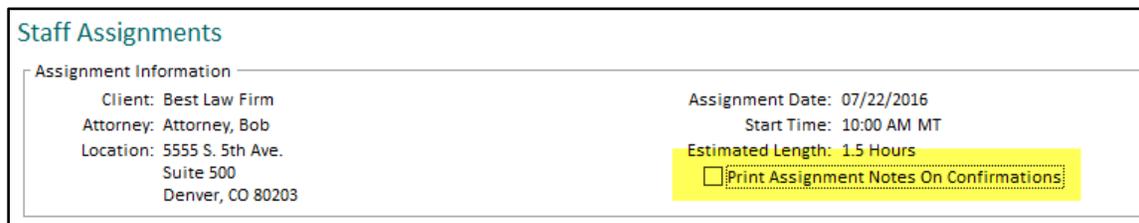
Emailed Letters & Reports Print Company Logo at the Top of Messages

Confirmations Print Order/Invoice Remarks for Ordering Client/Attorney
 Print Previous Appearances for Case
 Print Assignment Notes
 Exclude Other Services

Default Confirmation Status: Confirmed

Statements Do Not Print Accumulation Totals

Checking this will set the following checkbox on for each new assignment created. You can uncheck this on any assignment to override the default.



The screenshot shows the 'Staff Assignments' window with the 'Assignment Information' tab selected. The 'Print Assignment Notes On Confirmations' checkbox is highlighted in yellow.

Staff Assignments

Assignment Information

Client: Best Law Firm
Attorney: Attorney, Bob
Location: 5555 S. 5th Ave.
Suite 500
Denver, CO 80203

Assignment Date: 07/22/2016
Start Time: 10:00 AM MT
Estimated Length: 1.5 Hours
 Print Assignment Notes On Confirmations

ISSUES RESOLVED

CALENDAR

- When viewing the calendar when you have it set to show deponent names for each assignment, it will now include assignments on the calendar that do not have a deponent listed on the assignment. They will show "(No Deponent)" next to the assignment time. In addition, assignments without cases will show "(No Case)" and assignments without attorneys will show "(No Attorney)" on the calendar when you have it set to show those names. [SD-268]

STAFF

- When merging staff, it will no longer return an error referencing 'tJobFileStaff'. [SD-277]

ASSIGNMENTS

- When adding multiple deponents to an assignment, it will no longer replace any existing deponents listed on the assignment. [SD-315]
- When adding multiple deponents to the Deponent Update, it will no longer replace any existing deponents listed there. [SD-319]

STAFF INVOICES

- When clicking on the payment icon on a staff invoice that has a payment on it, it should now open the Transactions window showing all payments for that staff invoice in it. The date range will include the dates of all payments. This affected both normal and commissions invoices. [SD-195]
- When selecting a pay template on a staff invoice, it will no longer return an error. [SD-328]

LIST WINDOWS

- The Staff, Client, Attorney and Case Lists will all remember which option in the left-hand panel of the screen was selected, even after closing and reopening Solaria, so that it will also go back to the last option you have selected. For example, if you had 'C' selected to view all clients that start with 'C', then switch to 'E', it will always return to 'E' when you go back to view the client list. [SD-243]
- Switching companies while viewing any of the main list windows will now update the window title if it uses a different language setting for it. [SD-302]
- When searching in the Assignments, Orders, Invoices, Staff Invoices and Transactions Lists using a limit of 0 (zero), it will no longer return an error. [SD-320]

CATEGORIES AND TYPES

- When adding a new File Type, it will now give you a friendly error message if you have not selected an Associated Application for a file type. [SD-306]
- When printing the rate sheet from the Product Prices window, it will now sort items containing capital letters correctly with other items. [SD-317]

REPORTS

- You will now see an error message if you try to print a report with no report selected in the Reports window. [SD-250]
- The buckets at the bottom of the statements were showing 60 days in two buckets. The second bucket was changed to 61 – 90 Days. (The amounts in the buckets were correct.) [SD-298]

5.00.038 Patch Release

ISSUES RESOLVED

STAFF INVOICES

The Pay Items list on the Staff Invoice window will no longer overlap the Add and Remove buttons at the top of the "Pay Items" column when the window is sized smaller. [SD-358]

ASSIGNMENTS

When viewing the Assignment Details and fetch change requests from ServiceLink, it will no longer tell you that nothing needed to be updated. [SD-359]

The client confirmation will now print the Case Billing Reference number on it again.