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## 5.12b012 Patch Release

### ISSUES RESOLVES

#### SCHEDULE

The Legend on the Schedule will no longer show inactive color codes. [SD-527]

#### ASSIGNMENTS LIST

It will no longer return a SQL error if showing the Location Address column and an assignment location's address belongs to more than one client (due to bad data). [SD-535]

#### NOTES

When using the "Apply Note to Current & Future Assignments" checkbox on a Case note, it will no longer return a SQL error when it copies that note to all existing assignments that have that case on it. [SD-531]

#### REPORTS

The Financial → Aging report will now work correctly when the database is on SQL Server 2008. [SD-532]

The Staff → Payables Audit report will now exclude voided payments to staff. [SD-534]

The aging bucket named "30-60 Days" on statements was renamed to "31-60 Days" to more accurately define the invoices that go into that bucket. [SD-532]

#### CATEGORIES AND TYPES

The default task names shown in the Assignment Tasks window for tasks numbered 7 and 8 will now show as "Check-Out Assignment" and "Complete Staff Work" when using a new database or when you click on the "Defaults" link at the top of the list. [SD-533]

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## 5.12 Release

### ENHANCEMENTS

#### ASSIGNMENTS

- A new column named **Color Code** was added to the Assignment List window. This will display the **Color** selected on each assignment with both the description of the color and highlighted in the color itself. Click on the configure (cog) icon at the top-right of the list to check the new column to view it in the list. [SD-435]

Assignments						
Assignment#	Date	Time	Color Code	Client	Attorney	Deponent
45710	03/20/2014	1:00 PM		Nec Quam Consulting	Archie, Jeramie	Thomas, Karin P
45713	03/05/2014	9:30 AM	Video	Consumers and Consumers Expres	Baker, Helen R	Taylor, Denise L
45723	03/04/2014	9:00 AM	Video	Malesuada Augue Ut Industries	Ratliff, Wayne M	Sims, Patricia M
45735	03/03/2014	1:30 PM		Diam Company	Boston, Trina P III	Dudash, Sallie A
45736	03/17/2014	1:30 PM	Video	Malesuada Ut Associates	Cruz, Cindy M	Falk, Tanya J
45737	03/17/2014	2:30 PM	Video	Malesuada Ut Associates	Cruz, Cindy M	Dugan, Lucas G
45744	03/03/2014	10:00 AM		Risus Donec Corp.	Farmer, Patsy R	Sloan, James A
45753	03/06/2014	8:00 AM	Confirmed Client	Elit Pellentesque A Consulting	Gallo, Mia R	Ballard, Franklin I
45760	03/13/2014	12:00 PM	VIP	Consumers and Consumers Expres	Henry, Ruth D	Winter, John T
45764	03/03/2014	9:30 AM	Likely to Cancel	Big Black Bear Stores	Sandler, Idella C	Snodgrass, Kimberly K
45765	03/04/2014	9:00 AM		Consumers and Consumers Expres	Baker, Helen R	Cooks, Pamela R
45768	03/05/2014	12:00 PM		Ut Pellentesque Eget Incorporated	Rhein, Helen P	Raines, William M
45771	03/21/2014	2:00 PM		Vitae Sodales Nisi Foundation	Parker, Norma H II	Qualls, Charles G

- The **Location Address** column of the Assignment List window was updated to include the conference room name or client name in front of the street address if the location is in a conference room or a client's address. [SD-450]
- You can now enter the scheduled start time for a deponent on an assignment. This can be entered when you click on **Add** or **Edit** for a deponent on the assignment. [SD-452]

Deponents	Remove	Select	Add	Edit
Fink, Scott B Sr.			2:00 PM	
Flores, Glenn V			4:00 PM	

**Edit Deponent**

Deponent

First  Middle  Last  Sr.

Full Name: Fink, Scott B Sr.

Expert Expert Type

Employed By

Notes

Email

Phone

Assignment Information

Scheduled Start

Volume Number

Incident Date

Personal Number

The scheduled start time will show next to deponent names on the confirmations and will be shown in ServiceLink if you integrate with that.

- When an assignment is rescheduled and the date/time or location changed, it will add a note regarding the change. [SD-493]
- Wherever an assignment location is shown, it will now include the client name with the address information if the address is at a client's office. The client of the address will now also be sent to ServiceLink so it can be shown there as well. [SD-484,487]
- The ICS file created for Outlook appointments in confirmations will now include conference room addresses. It will also correctly show the staff assigned to each service; however the staff will not be included if the "Print Assigned Staff Name" setting is turned off in **Settings** → **Preferences** → **Clients** tab. [SD-485]
- Two fields were added to Deponent Update: **Billable Hours** and a **Read and Sign Note**.

Deponent Update													
View Split													
Deponents	Select	Remove	Add	Edit	Deposition Time	Transcript Pages	Exhibit Numbers	Exhibit # Pages	Volume Number	Billable Hours	Has Video	Read & Sign	Read & Sign Note
Doe, John					Start: 8:00 AM	1	1			01:30	<input type="checkbox"/>	<input type="checkbox"/>	Waived
					End: 9:30 AM	40	1						

The **Billable Hours** will be used on client invoices for line items that are for an hourly rate. These have also been added to ServiceLink and will pull in from the turn-in sheet that is entered there by the staff. [SD-431,453]

## ASSIGNMENT FILES

Assignment files will now display the date and time a file is uploaded to Solaria. (Note, existing files will not show this information; only new files added after the time of the upgrade.) [SD-500]

File Name	Open	Download	Edit	Delete	Add	Description	Upload Date	File Type	Deponent
C:\Repository\NR\Bravo, OrlandoV1_103009 Transcript.txt						Bravo, OrlandoV1_103009 Transcript	05/16/2016 6:45 PM	ASGII	Gillam, Glenn T

## ORDERS

A new column named **Order Notes** was added to the Order List window. This will display the first part of each active note on the order. Click on the configure (cog) icon at the top-right of the list to check the new column to view it in the list. [SD-468]

## STAFF PROGRESS TRACKING

Items that are due on the current day will now be highlighted in yellow on the Staff Progress Tracking window. [SD-494]

## CLIENTS/ATTORNEYS

### CLIENT INVOICE/STATEMENT PREFERRED DESTINATION

You can now set a preferred destination for a client's invoices and statements, either "no preference" (the default), mailed or emailed. [SD-13]

**Best Law Firm**

Client Name:  Client#: 8901 Effective:  Expires:

Client Type:  Warning:

Phone Numbers: Direct:  Toll-Free:  Fax:

Client Defaults: Invoice?  Invoice Invoice Type:   Send Mailings Invoice Terms:   Charge Interest on Late Payments  C.O.D. Order Template:   Do Not Send To Collections

Invoice/Statement Preferred Destination:  No Preference  Mailed To:   Emailed To:

General | Invoice Remarks | Collections | Commissions | Files | Cases

Selecting **Mailed To** allows you to select a specific address to send the invoices and statements. When an invoice is created for the client, it will use this address as the default billing address; however, it can be overwritten on the invoice. Statements for the client will show this address on them.

Selecting **Emailed To** allows you to enter an email address where invoices and statements should be emailed instead of printed and mailed.

### ATTORNEY INVOICE/STATEMENT PREFERRED DESTINATION

You can override the client preferred destination for invoices and statements on each attorney.

**Attorney, Bob**

Client:

First Name:  Middle:  Last:  Suffix:  Attorney#: 18363 Effective:

Email:  Birthday:  Warning:  Expires:

Phone Numbers

Direct:  Mobile:  Pager:  Fax:

Override Defaults

Invoice? Invoice Type:   Send Mailings

Invoice Invoice Terms:   Charge Interest on Late Payments

C.O.D. Order Template:

Invoice/Statement Preferred Destination

Use Client Preference

Mailed To:

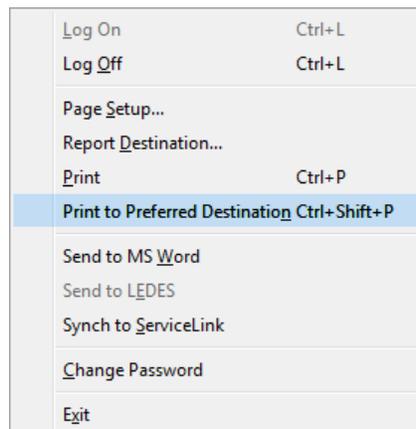
Emailed To:

General Invoice Remarks Commissions Files Standing Order

By default, an attorney will be set up to **Use Client Preference**. You can override this by selected **Mailed To** or **Emailed To**.

## FILE MENU

A new menu option was added: **File → Print to Preferred Destination**. This can also be accessed using **CTRL+SHIFT+P**. Use this when printing invoices or statements to send the reports directly to the preferred destination without prompting for a destination. If the preference is to email, it will open the email window with the report; otherwise, it will print the report to the printer.



## PRINTING INVOICES

From the Invoice window, use the **File → Print to Preferred Destination** menu option to print an invoice directly to the preferred destination of the attorney or of the client (if the attorney uses the client's preference).

From the Invoice List window, use the **File → Print to Preferred Destination** menu option to print each selected invoice directly to the preferred destination of the attorney or of the client (if the attorney uses the client's preference). For emailed invoices, it will open a separate window for each email to send so that they can be reviewed before sending.

## PRINTING STATEMENTS

Statements can be printed from the Client, Attorney and Case Maintenance windows. They can also be printed from the Reports area.

The Client, Attorney and Case Maintenance windows print statements with the click on the **Print Statement** button, using the **File → Print** menu option, or using the **File → Print to Preferred Destination** menu option. When using the **File → Print to Preferred Destination** menu option, it will not prompt you for the report destination and

will print each statement directly to the preferred destination. The other print options will continue to send the statements to one destination that you select.

When printing statements from the Reports area, the Report Criteria windows show a checkbox called **Print to Preferred Destination** that you can use print each statement directly to the preferred destination of the recipient of the statement.

The screenshot shows the 'Report Criteria' dialog box. It has a list of client names on the left, including '\_Missing Client Name', '1-800-CONTACTS', '10000 Auto Parts', and others. Below the list are three sections: 'List On Statement' with radio buttons for 'All Invoices and Payments' (selected) and 'Only Unpaid Invoices'; 'Date Range' with 'Beginning' (02/01/2017) and 'Ending Date' (02/28/2017) fields; and 'Print' with radio buttons for 'Non-Zero Statements Only' (selected) and 'All Statements'. At the bottom left, the checkbox 'Print to Preferred Destination' is circled in red. 'Cancel' and 'OK' buttons are at the bottom right.

## CASES

A new column named **Court Action** was added to the Case List window. This will display the court action number on each case. Click on the configure (cog) icon at the top-right of the list to check the new column to view it in the list. Note your Solaria may be set up to call this by a different name. [SD-492]

The screenshot shows the 'System Language' configuration window. At the top, there is a 'Company' dropdown menu set to 'Demonstration'. Below this is a table for configuring singular and plural forms for various terms. The 'Court Action, Docket, etc.' row is highlighted in yellow.

	Singular	Plural
Clients, Law Firms, Courts, etc.	Client	Clients
Attorneys	Attorney	Attorneys
Case	Case	Cases
Cases Name, Caption, Title, etc.	Case Caption	
<b>Court Action, Docket, etc.</b>	<b>Court Action</b>	
Case User Reference Number	User Reference	
Deponents, Witnesses, etc.	Deponent	Deponents

## CATEGORIES AND TYPES

- Assignment Types and Services can now be set up to be hidden from new assignment requests in ServiceLink so that contacts have less items to choose from when requesting an assignment. Go to **Categories and Types → Assignment Types** or **Services**. Check the "Hide on SL Request" checkbox next to the assignment types and services that you do not want contacts to see on new assignment requests in ServiceLink. (This will not be shown unless you integrate with ServiceLink.) This will not affect the assignment type and services shown on scheduled assignments in ServiceLink. [SD-498,499]

Set Up Assignment Types					
Description	Remove	Add	Active	System	Hide on SL Requests
Arbitration			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CD/Tape Transcription			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Conference			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Deposition			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examination Under Oath			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hearing			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical Records Request			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Product Pay Templates now allow you to enter rates for each delivery type on one window for the currently selected template. [SD-504]

Set Up Product Pay Templates											
Template		for Assignment Type									
Hearing		Hearing									
Description	Product Type	Pay Type	Normal	9 Day Expedite	8 Day Expedite	7 Day Expedite	6 Day Expedite	4 Day Expedite	3 Day Expedite	2 Day Expedite	
Additional Hard Transcript	Transcript - Copy	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Attendance	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Attendance (Listening Time)	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Attendance Court	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Attendance-After Hours	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Attendance-Minimum Fee	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Attendance-Your Share	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Audio Copy	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Captioning	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Copy Condensed	Transcript - Copy	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Copy E-Transcript	Transcript - Copy	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Copy Hard Copy Transcript	Transcript - Copy	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Copy PDF Transcript	Transcript - Copy	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Document Copying	Misc - Paid	Page Rate	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	
Laptop, iPad Rental	Misc - Paid	Fiat Fee	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	
Mileage Expense	Misc - Paid	Percentage	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Original & One Compressed	Transcript - Original	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Original & One Copy Minimum	Transcript - Original	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Original & One Copy PDF	Transcript - Original	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Original & One E-Transcript	Transcript - Original	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Original & One Paper Copy	Transcript - Original	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Original & Two Copies	Transcript - Original	Percentage	65.0%					65.0%	65.0%	65.0%	
Parking	Misc - Paid	Percentage	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Realtime	Misc - Paid	Page Rate	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	
Realtime with Connection	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Rental	Misc - Paid	Fiat Fee	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	
Rough Draft	Misc - Paid	Percentage	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	
Skype Connection	Misc - Paid	Fiat Fee	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	
Travel											

Right-click on a cell to view a menu to "Fill Right" and "Fill Down" which will copy the rate in the current cell to the rest of the delivery types to the right of it or to the other products below it.

You can also export and import the product rates to/from a Microsoft Excel spreadsheet. Click on the **Export** button to save the current view in an Excel spreadsheet. This will be for the currently selected template only. Leave the columns as-is and the column headings as-is. After you update your rates in Excel, import the spreadsheet by clicking on the **Import** button. It will import into the current view but will not save any changes until you click **Save Changes**. Note: If you have more than one tab in a spreadsheet, the importer will prompt you for the tab to import from.

The **Copy Rates To...** button allows you to select any of the current rates you are viewing and copy them to other templates.

- Product Prices now allow you to enter prices for each delivery type on one window for the currently selected company and assignment type. [SD-503]

Set Up Product Prices

Company: Demonstration Assignment Type: Deposition

Description	Product Type	Unit Type	Normal	9 Day Expedite	8 Day Expedite	7 Day Expedite	6 Day Expedite	4 Day Expedite	3 Day Expedite	2 Day Expedite
Additional ASCII (Text)	Misc - Unpaid	Flat Fee	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Additional Condensed	Misc - Unpaid	Flat Fee	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Additional E-Transcript	Misc - Unpaid	Flat Fee	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Additional Hard Transcript	Transcript - Copy	Page Rate	0.300	0.300	0.300	0.300	0.300	0.300	0.300	0.300
Additional PDF Transcript	Misc - Unpaid	Flat Fee	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Additional SBF Transcript	Misc - Unpaid	Flat Fee	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Attendance	Misc - Paid	Hourly Rate	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000
Attendance (Listening Time)	Misc - Paid	Hourly Rate	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000
Attendance Court	Misc - Paid	Flat Fee	279,650	279,650	279,650	279,650	279,650	279,650	279,650	279,650
Attendance-After Hours	Misc - Paid	Hourly Rate	85,000	85,000	85,000	85,000	85,000	85,000	85,000	85,000
Attendance-Minimum Fee	Misc - Paid	Flat Fee	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Attendance-Your Share	Misc - Paid	Flat Fee	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Audio Copy	Misc - Paid	Flat Fee	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Captioning	Misc - Paid	Hourly Rate	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
CD Package	Misc - Unpaid	Flat Fee	10,000	10,000	10,000	10,000	10,000	35,000	35,000	35,000
CD/DVD Copied as an Exhibit	Misc - Unpaid	Flat Fee	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000
COD Processing Fee	Misc - Unpaid	Flat Fee	35,000	35,000	35,000	35,000	35,000	3,250	3,250	3,250
Conference Call	Misc - Unpaid	Flat Fee	35,000	35,000	35,000	35,000	35,000	3,250	3,250	3,250
Copy Condensed	Transcript - Copy	Page Rate	3,250	3,250	3,250	3,250	3,250	3,250	3,250	3,250
Copy E-Transcript	Transcript - Copy	Page Rate	3,250	3,250	3,250	3,250	3,250	3,250	3,250	3,250
Copy Hard Copy Transcript	Transcript - Copy	Page Rate	3,250	3,250	3,250	3,250	3,250	2,500	2,500	2,500
Copy PDF Transcript	Transcript - Copy	Page Rate	3,250	3,250	3,250	3,250	3,250	0,300	0,300	0,300
Digital Signature	Misc - Unpaid	Flat Fee	2,500	2,500	2,500	2,500	2,500	10,000	10,000	10,000
Document Copying	Misc - Paid	Page Rate	0,300	0,300	0,300	0,300	0,300	10,000	10,000	10,000
DVD/Tape Stock Media	Misc - Unpaid	Flat Fee	10,000	10,000	10,000	10,000	10,000	0,750	0,750	0,750
E-Transcript on a CD	Misc - Unpaid	Flat Fee	10,000	10,000	10,000	10,000	10,000	0,900	0,900	0,900
Exhibit Color	Misc - Unpaid	Page Rate	0,750	0,750	0,750	0,750	0,750	0,300	0,300	0,300
Exhibit Multi-Format	Misc - Unpaid	Flat Fee	0,900	0,900	0,900	0,900	0,900	0,600	0,600	0,600
Exhibit Scanned	Misc - Unpaid	Flat Fee	0,900	0,900	0,900	0,900	0,900	0,600	0,600	0,600

Buttons: Copy Prices To..., Export, Import, Undo Changes, Save Changes

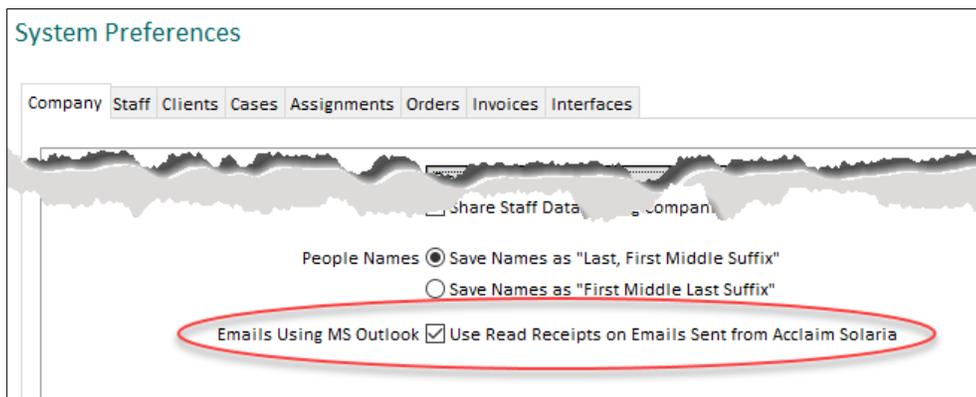
Right-click on a cell to view a menu to "Fill Right" and "Fill Down" which will copy the price in the current cell to the rest of the delivery types to the right of it or to the other products below it.

You can also export and import the product prices to/from a Microsoft Excel spreadsheet. Click on the **Export** button to save the current view in an Excel spreadsheet. This will be for the currently selected company and assignment type. Leave the columns as-is and the column headings as-is. After you update your prices in Excel, import the spreadsheet by clicking on the **Import** button. It will import into the current view but will not save any changes until you click **Save Changes**. Note: If you have more than one tab in a spreadsheet, the importer will prompt you for the tab to import from.

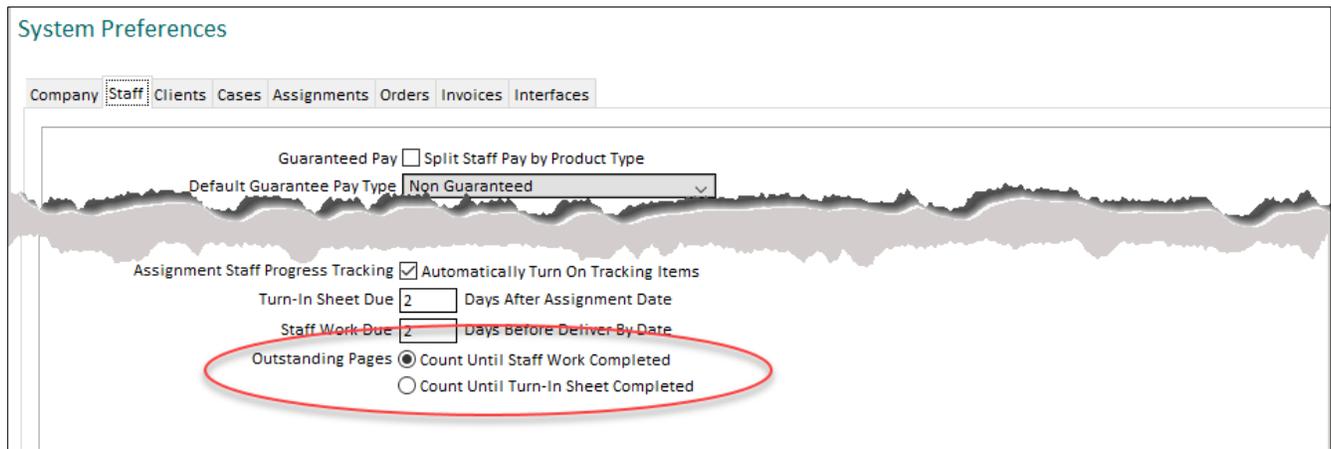
The **Copy Prices To...** button allows you to select any of the current prices you are viewing and copy them to other companies and assignment types.

## SYSTEM PREFERENCES

- A new company preference was added in **Settings → Preferences → Company** tab to use read receipts on emails sent out using Microsoft Outlook. This will be turned on by default for upgrading customers for backwards compatibility. [SD-514]

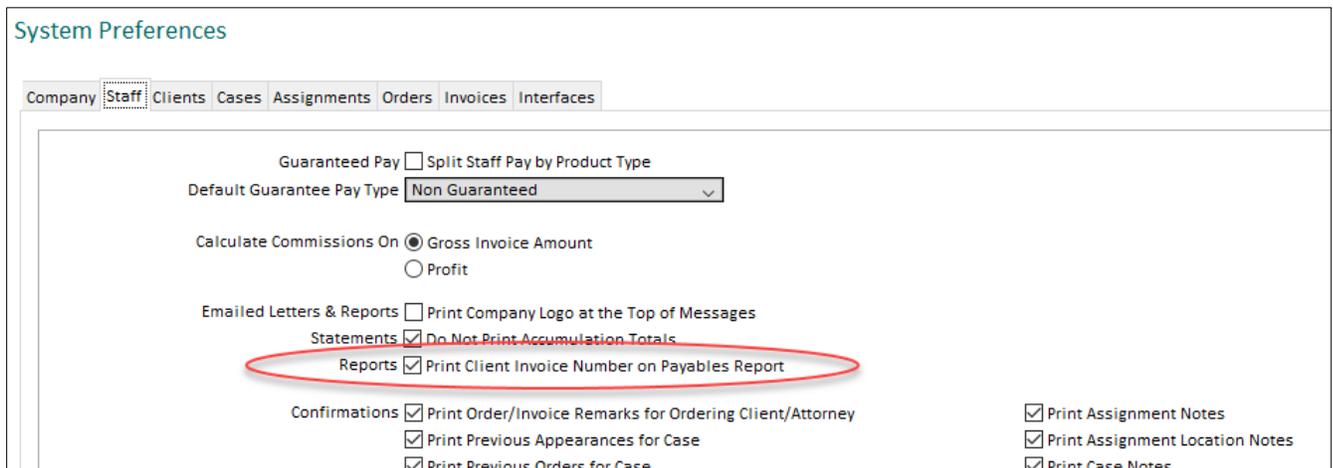


- A new staff preference was added in **Settings → Preferences → Staff** tab to allow you to calculate outstanding pages in two ways:
  - Count Until Staff Work Completed:** this will calculate pages as outstanding for staff until the Staff Work Completed On date has been entered in Staff Progress.
  - Count Until Staff Turn-In Sheet Completed:** this will calculate pages as outstanding for staff until the Staff Turn-In Sheet Completed On date has been entered in Staff Progress.

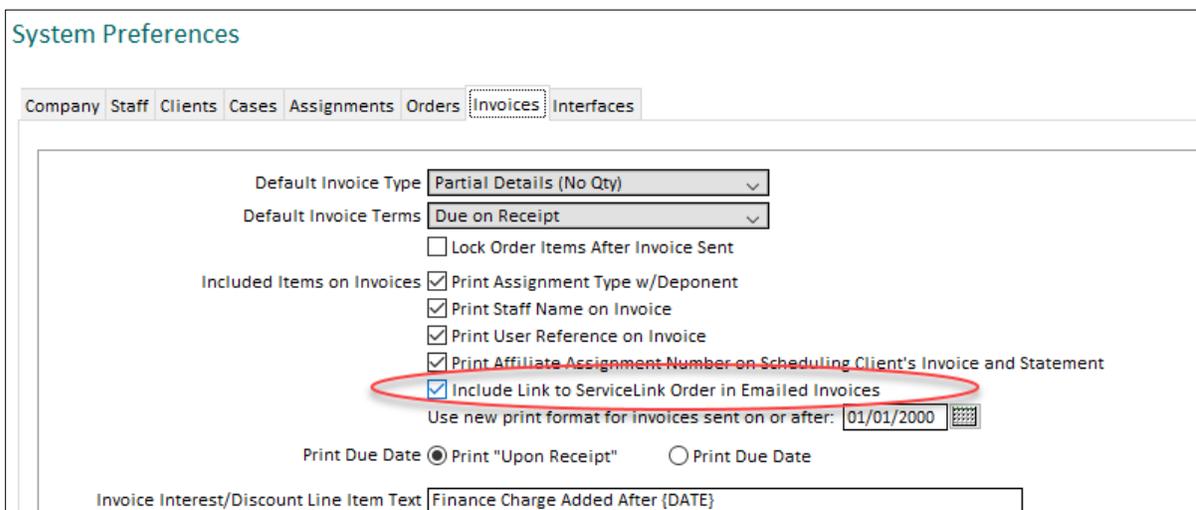


The “Assignment Work Completed” report in **View → Reports → Assignments** will be renamed to “Assignment Turn-In Sheets Completed” when the second option is selected in preferences. [SD-467]

- A new staff preference was added in **Settings → Preferences → Staff** tab to print the client invoice number on line items on the Staff “Payables” report.



- A new invoice preference was added in **Settings → Preferences → Invoices** tab to include a link to the ServiceLink order in emailed invoices if you are integrating with ServiceLink. [SD-513]



The email will contain a “View and Pay Online” link in the email body.

## REPORTS

A new report called "Client Invoice Profit" was added to the Reports area under the **Financial** section. It lists client invoices within a sent or due date range showing the amount billed minus the staff pay to show the net profit on each. [SD-505]

Demonstration			Client Invoice Profit				
			Client Invoices Sent 01/01/2017 to 01/31/2017				
Invoice#	Assignment#	Client	Billed	Paid	Commissions	Profit	Profit %
44836	46612	Facilisi Sed Neque Company	\$ 827.50	\$ 556.15	\$ 0.00	\$ 271.35	32.79%
44837	46412	Sed Tortor Ltd	\$ 299.00	\$ 209.30	\$ 0.00	\$ 89.70	30.00%
44838	43591	Matrix Architectural Service	\$ 396.50	\$ 257.73	\$ 0.00	\$ 138.77	35.00%
44839	45861	Matrix Architectural Service	\$ 191.75	\$ 134.23	\$ 0.00	\$ 57.52	30.00%
44840	46753	Augue Corp.	\$ 671.80	\$ 450.10	\$ 0.00	\$ 221.70	33.00%
44841	45706	Phasellus LLC	\$ 2,158.45	\$ 742.88	\$ 0.00	\$ 1,415.57	65.58%
44842	46753	Nunc Pulvinar Arcu Consulting	\$ 205.30	\$ 131.95	\$ 0.00	\$ 73.35	35.73%
44843	45706	Elit Pede Institute	\$ 997.35	\$ 307.13	\$ 0.00	\$ 690.22	69.21%
44844	45706	Risus Donec Corp	\$ 902.55	\$ 307.13	\$ 0.00	\$ 595.42	65.97%

## MISCELLANEOUS

The email address field for staff, contacts, attorneys and deponents will now hold up to 255 characters. [SD-454]

## SERVICELINK AUTO-FETCH TOOL

You can now set up one workstation to auto-fetch changes from Servicelink on a timer schedule, such as every 10 minutes. It is recommended that you use a workstation that is not being heavily used by a Solaria user. Go to **Settings** → **Workstation Settings** on the workstation that will run the tool. [SD-475]

ServiceLink Auto-Fetch

Run ServiceLink Auto-Fetch on This Workstation

Auto Start After Logging Into Acclaim Solaria

Auto Fetch Every:  Minutes

Show Tasks Completed By:

1. Turn on the **ServiceLink Auto-Fetch** checkbox.
2. Check **Auto Start After Logging into Acclaim Solaria** if you want it to automatically run after the workstation logs into Solaria. Otherwise, you will need to start it manually.
3. Enter the number of minutes to wait in-between fetches. The minimum is 5 minutes.
4. Select the user that you want to show on assignment tasks that get completed by the fetch tool. Using a generic user enables you to tell that the system completed a task rather than a specific user.
5. Save the changes.

You will see a new icon show in the toolbar called **SL Fetch**.



This icon will show green if the tool is turned on, red if it is turned off and yellow if it is currently running (fetching data from ServiceLink). Click on the toolbar icon to show the ServiceLink Auto-Fetch Log.

Time	Action	Item Affected	Item #
Feb 9 2017 21:00:54	Fetching of Staff Confirmations started.		
Feb 9 2017 21:00:54	Fetching of Staff Confirmations finished. 0 item(s) retrieved.		
Feb 9 2017 21:00:54	Fetching of Assignment Files started.		
Feb 9 2017 21:00:55	Fetching of Assignment Files finished. 0 item(s) retrieved.		
Feb 9 2017 21:00:55	Fetching of Completed Turn-In Sheets started.		
Feb 9 2017 21:00:55	Fetching of Completed Turn-In Sheets finished. 0 item(s) retrieved.		
Feb 9 2017 21:00:55	Fetching of Assignment Check-Ins started.		
Feb 9 2017 21:00:56	Fetching of Assignment Check-Ins finished. 0 item(s) retrieved.		
Feb 9 2017 21:00:56	Fetching of Staff Personal Time-Offs started.		
Feb 9 2017 21:00:56	Fetching of Staff Personal Time-Offs finished. 0 item(s) retrieved.		
Feb 9 2017 21:00:56	Fetching of Client Online Payments started.		
Feb 9 2017 21:00:57	Fetching of Client Online Payments finished. 0 item(s) retrieved.		
Feb 9 2017 21:00:57	----- Fetching process ended. -----		
Feb 9 2017 21:05:53	----- Fetching process started. -----		
Feb 9 2017 21:05:53	Fetching of Assignment Requests started.		
Feb 9 2017 21:05:54	Fetching of Assignment Requests finished. 0 item(s) retrieved.		
Feb 9 2017 21:05:54	Fetching of Assignment Changes and Confirmations started.		
Feb 9 2017 21:05:54	Fetching of Assignment Changes and Confirmations finished. 0 item(s) retrieved.		
Feb 9 2017 21:05:54	Fetching of Staff Confirmations started.		
Feb 9 2017 21:05:54	Fetching of Staff Confirmations finished. 0 item(s) retrieved.		
Feb 9 2017 21:05:54	Fetching of Assignment Files started.		
Feb 9 2017 21:05:55	Fetching of Assignment Files finished. 0 item(s) retrieved.		
Feb 9 2017 21:05:55	Fetching of Completed Turn-In Sheets started.		
Feb 9 2017 21:05:55	Fetching of Completed Turn-In Sheets finished. 0 item(s) retrieved.		
Feb 9 2017 21:05:55	Fetching of Assignment Check-Ins started.		
Feb 9 2017 21:05:56	Fetching of Assignment Check-Ins finished. 0 item(s) retrieved.		
Feb 9 2017 21:05:56	Fetching of Staff Personal Time-Offs started.		
Feb 9 2017 21:05:56	Fetching of Staff Personal Time-Offs finished. 0 item(s) retrieved.		
Feb 9 2017 21:05:56	Fetching of Client Online Payments started.		
Feb 9 2017 21:05:57	Fetching of Client Online Payments finished. 0 item(s) retrieved.		
Feb 9 2017 21:05:57	----- Fetching process ended. -----		

Timer Info   Clear Log   Start Timer   Stop Timer   Print   Close

Here you can see the activities from the fetch tool since the Solaria session started. You can also:

- View the current timer interval and how long before it runs again
- Clear the log
- Start and Stop the Timer
- Print the log

The Auto-Fetch tool will only run the fetch process if no other action is taking place in Solaria on the workstation. If you are using the workstation and have a pop-up window open or are saving changes at the time that the tool wants to run, it will wait and try again after one minute.

## ISSUES RESOLVED

### ASSIGNMENTS

When you change the assignment location on an assignment, the notes associated with the previous location will no longer show. [SD-489]

### ORDERS

When changing the billing address on an order or invoice using the drop-down menu of addresses, it will no longer save the address over the previous address. [SD-517]

### INVOICES

When viewing the order/invoice remarks from the Invoices window using the **Remarks/Files** link button, it will no longer cut off the attorney remarks. [SD-508]

