Acclaim Solaria 5.13 Release Notes

5.13.013 Release

ISSUES RESOLVED

- Staff payments will now be sent to ServiceLink correctly when using split payments for staff. *[SD-658]*
- Opening the file list for an assignment will now be much faster. *[SD-598]*
- When the Staff Payables report runs, it will no longer pay the staff more than 100% of what is owed to them on any line items if they are paid when clients pay and the client overpaid an item on their invoice. *[SD-628]*
- When running the Order History report, it will no longer return an error that closes Solaria if there are no orders for the date range selected. *[SD-591]*
- When running the Financial → Client Invoice Profit report, it will now include invoices for other companies besides the first company created in the database, if other companies were selected for the report. *[SD-615]*
- The scrollbar was sometimes disappearing on the manager view of the schedule when there were more items in the list than what was visible. This has been fixed. *[SD-617]*
- When adding a new company, it will no longer show an error message. *[SD_636]*

5.13.012 Release

ISSUES RESOLVED

- Assignment files being sent to ServiceLink will no longer be renamed without spaces first, thus preventing an error when it tried to rename the files back to include spaces. *[SD-585]*
- When using the Print Logo on Left of Mailable Reports option, it will no longer shrink the logo. We recommend using images of 1" high by 6.5" wide. *[SD-577]*
- The Assigned Staff column in the Assignment List window will now properly show ampersands in staff names. *[SD-573]*

5.13.011 Release

ENHANCEMENTS

COMPANY

The **Include Company Header on Invoices** checkbox on the Company Maintenance window was renamed to **Include Company Header on Mailable Reports** because it is used on invoices, statements, orders, receipts and miscellaneous reports.

A new checkbox was added called **Print Logo on Left of Mailable Reports**. This can be turned on if **Include Company Header on Mailable Reports** is unchecked. It will print the logo on the left side of the page in place of the company name and address on all reports that are mailable. *[SD-577]*

Demonstration

Company Name: Demonstration

Phone Numbers
Direct: 800-279-0244
Toll-Free: 800-279-0244
Fax: 800-279-0244

Other Information
Tax ID: 12-3456789
Default Tax: Select One
☐ Include Company Header on Mailable Reports
☑ Print Logo on Left of Mailable Reports
☑ Group Staff Invoices by Deponent

ASSIGNMENT LIST

A new column named **Confirmation Status** was added to the Assignment List window. This will display the client confirmation status that was entered on each assignment. 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-581]*

ASSIGNMENT FILES

Select All and **Deselect All** buttons were added to the window that sets the user access on assignment files when integrating with ServiceLink. [SD-582]

ORDERS

The Order Worksheet report printed from the Order window will now print case and staff invoice remarks at the top of the report under the case information. The report will no longer page break between orders. *[SD-580]*

REPORTS

The Financial Aging report will now give you the option to print the report by the invoice due dates or sent dates. *[SD-583]*

ISSUES RESOLVED

- Merges of clients, attorney or staff that have the exact same name and point to one entity in ServiceLink will no longer result in the ServiceLink entity being deleted. *[SD-576]*
- The zebra striping on the task lists found on the Options panel of the Home window will now show correctly and allow you to see the currently selected line. *[SD-574]*
- Saving product prices for the default company-assignment type lists will no longer return a SQL error. *[SD-578]*
- Deleting a staff person with service areas assigned to them will no longer return a SQL error. *[SD-579]*

5.13 Release

ENHANCEMENTS

MANAGER SCHEDULE

When an assignment is selected in the Manager view of the Schedule, it will now display the color code description and color in the details on the right side of the window since the highlight is hiding the color on the left side of the window. *[SD-526]*

ASSIGNMENT LIST

The "Show" date range drop-down list at the top of the Assignments List window now includes the options of "Yesterday" to view yesterday's assignments and "Tomorrow" to view tomorrow's assignments. *[SD-448]*

ASSIGNMENTS

- The case name will now display in the left panel between the assignment date and the deponent name. *[SD-451]*

- When viewing assignment requests from ServiceLink when the deponents cannot all be found in Solaria, it will now highlight the Deponents section in yellow. *[SD-522]*
- The Affiliate Assignment Number was expanded to allow up to 255 characters in it. *[SD-556]*
- The Notes Summary will now show the type of note in front of each note (e.g. "Case", "Client", "Assignment", etc.). *[SD-559]*
- The "Copy Assignment" feature was modified to give a couple of new options. A window will display prompting you for the type of copy you want to do: *[SD-523]*

Select **Copy Main Information Only** to copy the assignment like it always has. Check **Copy Assignment Notes** if you would like it to also copy the assignment notes to the new assignment.

Select **Copy All Assignment Details and Notes** to copy everything you see on the assignment details window except for client confirmations and assigned staff.

STAFF ASSIGNMENTS

The **Assign to Service** button was moved from the right side of the window to the left side of the window next to the other buttons to make it less cumbersome to move the mouse to the button when a wide monitor is used. *[SD-544]*

ATTORNEYS PRESENT

When viewing the worksheet information from ServiceLink on the split screen, it will now show numbers in front of the buttons at the top of the window to represent the order of the steps you should follow. You should always search for existing attorneys first, then if you cannot find one, you can add them from the right side. *[SD-561]*

In addition, when you click on "1. Search Selected", it will now only show the first 10 characters of the attorney's last name and the first 10 characters of the client name so it will do more of a "fuzzy" search for the attorney instead of an exact match.

ORDERS

- Whenever the shipping date is shown on windows or reports, it will now show the label of "Shipped On" for consistency. *[SD-512]*
- The Order date field was added to the window so you can see the date the order was placed and adjust it if needed. *[SD-473]*
- The assignment type and assignment delivery type were added to the window for informational purposes. *[SD-547]*

- Text shown in the Order/Invoice Remarks pop up window can now be highlighted and copied to the clipboard. *[SD-555]*

INVOICES

- The "C.O.D." indicator has been moved from the Shipping tab to the Bill To section on the invoice for better visibility. *[SD-548]*

- The assignment type and order delivery type were added to the "Invoice" tab on the window for informational purposes. *[SD-549]*

STAFF INVOICES

- Two new search options were added to the staff invoice list search:
  1. You can now search for staff invoices that have a payment on a specific date. This allows you to pull up a list of all staff invoices that were paid in a specific payroll period. *[SD-542]*
  2. You can search for staff invoices for staff that are in a specific department. *[SD-551]*

- You can now view and modify the non-guaranteed "pay if client paid" option on staff invoices.

STAFF PROGRESS TRACKING LIST

Two new column options were added to the Staff Progress Tracking list window: Client and Attorney. These columns will show the scheduling client and attorney on the assignment related to the items in the list. Click on the configure button for the list to select either of these columns to show in the list. *[SD-528]*

STAFF MAINTENANCE

The staff initials field was expanded to allow up to 10 characters in it. *[SD-550]*

SYSTEM PREFERENCES

- A new company system preference was added to show the start time of assignments that are scheduled for all day. Go to **Settings → Preferences** and check the **Show Start Time for All Day Assignments** option. *[SD-539]*

The schedule will show the start time followed by "(All Day)" on it.

- A new staff system preference was added to pay staff using the deponent billable hours on hourly order pay items instead of the staff person's billable hours. *[SD-562]*

- A new client system preference was added to default the **Invoice/Statements Preferred Destination** for attorneys to send to their email address when new attorneys are added throughout Solaria. *[SD-541]*

REPORTS

- The Word Merge export for assignments (JOBINFO.TAB) will now include the following fields: DeliverBy, DeliveryType, AffiliateJobNumber and Services. *[SD-515]*
- If you are intergrating with ServiceLink, the Staff Payables report will now give you the option to send all updated staff invoices and transactions to ServiceLink after it is complete and you decide to pay the invoices. It will create the PDF's, upload them then send the invoice and transaction information to ServiceLink. Note this could take some time depending upon the number of invoices being paid. *[SD-530]*

CATEGORIES AND TYPES

INVOICE PRINT TYPES

The "Invoice Types" category was renamed to "Invoice Print Types" to match the name used for the drop-down list on the invoices. This was also renamed on the System Preferences, Client Maintenance, Attorney Maintenance and Staff Maintenance windows. *[SD-529]*

PRODUCT PAY TEMPLATES

When copying rates from a product pay template, it will now copy the Pay Type for the selected products to the target templates. *[SD-521]*

PRODUCT PRICES

You can now create price templates with special rates in addition to having the default prices per company and assignment type. On the Product Prices window, you will view the default prices for each company and assignment type combination by default. Select the combination of the rates you want to view or edit from the drop-down list. *[SD-525]*

Click on the **Add Template** button at the bottom of the window to create a custom price template. You will give it a name and can make it active or inactive.

Set Up Product Prices

View: ○ Default Prices by Company and Assignment Type:
● Price Templates: Special Rates for Denver   Template Name Special Rates for Denver   ☑ Active

Description	Product Type	Unit Type	Normal	9 Day Expedite	8 Day Expedite	7 Day Expedite	6 Day Expedite	4 Day Expedite	3 Day Expedite
Additional ASCII (Text)	Misc - Unpaid	Flat Fee	40.000	40.000	40.000	40.000	40.000	40.000	4
Additional Condensed	Misc - Unpaid	Flat Fee	40.000	40.000	40.000	40.000	40.000	40.000	4
Additional E-Transcript	Misc - Unpaid	Flat Fee	40.000	40.000	40.000	40.000	40.000	40.000	4
Additional Hard Transcript	Transcript - Copy	Page Rate	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	4
Additional SBF Transcript	Misc - Unpaid	Flat Fee	40.000	40.000	40.000	40.000	40.000	40.000	4

Click on the **Delete Template** button at the bottom of the window to delete a custom price template that you do not want to keep. It will delete the template you are currently viewing. Only templates that have not been used on a client invoice can be deleted.

Price templates can be used on client invoices. They will use the default pricing for the company and assignment type to start, or if the client or attorney has their own "overwritten" prices, it will use those. You can change the invoice to use a price template using the **Prices** drop-down list on the **Invoice** tab at the top of the invoice.

Selecting a different item in the drop-down list will update the prices shown on the screen. No changes will be saved until you click **Save Changes**. Any items you add to the list will use the prices from the selected template.

USER SETTINGS

You can now turn on "zebra" striping of lists to make them easier to read. This makes every-other line a different color. Each user can turn this on or off for the lists in **Categories and Types** and/or the main lists (Assignments list, Orders list, Invoices list, etc.). You can also set the color that you want to use for this. *[SD-163]*

Go to **Settings → My Settings** and turn on the lists you want to show striping on. Click on **Set Color of Stripes** to change it from the default gray that is used. A sample list is shown on the window to preview what the striping will look like.

ISSUES RESOLVED

SCHEDULE

Going to a specific date on the schedule by selecting **Company → Find Schedule Date** or pressing **CTRL+SHIFT+S** will now open the calendar correctly to the date entered. *[SD-536]*

ASSIGNMENTS

- When creating a repeat assignment, it will no longer return a SQL error when it creates the note regarding the repeat assignment numbers. *[SD-554]*
- When adding a new deponent to an assignment, it will no longer set their Date of Birth to 01/01/2000 after the assignment is saved. *[SD-564]*
- Custom confirmations will now list deponents by start time first, then by last name. *[SD-565]*
- When exporting assignment information to Word, it will now show the names for the caller contact, attorneys and other providers on the case in First Middle Last Suffix format instead of last name first. *[SD-567]*
- After adding a file to an assignment, sending to ServiceLink, then immediately updating the file, it will no longer lose the changes made when you are in a time zone east of Mountain time zone. *[SD-488]*

STAFF PROGRESS

When "12:00 AM" is the actual start time stored for a staff person's check out start time, it will now display that time instead of a blank start time. *[SD-545]*

DEPONENT UPDATE

When saving the deponent update, it will no longer modify the check out billable hours that were entered if only one staff person was on the assignment. It will also only update the check out start and end times if the deponent start and end times were entered and check out did not have a start and/or end time. *[SD-546]*

ORDERS

- When opening a pending order that came in from ServiceLink, it will now populate the hourly order items using the deponent billable hours. *[SD-538]*
- The Assignment Orders report will now print any order remarks for attorneys. *[SD-571]*

STAFF INVOICES

If a staff person is getting paid from more than one order and the delivery type is changed on one of the orders, it will no longer change the pay rates on their invoice to $0 for the pay items that are not for that order. *[SD-537]*

SERVICELINK

- When an error is encountered during the fetch process, it will no longer return a SQL error when it tries to store that error in the log. *[SD-543]*
- Solaria will no longer send any notes that have a blank note text on them, thus avoiding an error that prevents other data from being sent to ServiceLink. *[SD-560]*

REPORTS

- The Client Invoice Profit report will now print correctly when a single client is selected for the report. *[SD-570]*
- The Aging report will now include amounts in the individual buckets that are for invoices due right on the cut-off date for the bucket. *[SD-572]*