Acclaim Solaria 5.40 Release Notes

5.40 Release
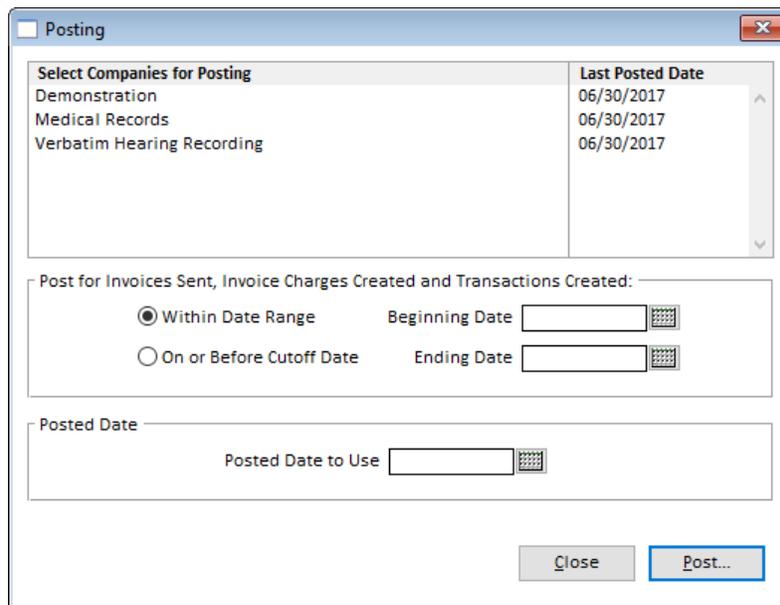
<div style="background:blue; color:white">

ENHANCEMENTS

</div>

POSTING PROCESS

A new posting process has been added to post invoices and transactions which will lock them down to keep users from changing them. *[SD-54]*

A new **Posting** privilege was added to **User Access Groups**. By default, no user will have access to this new privilege. User access groups can be granted "Full Access" to this privilege to allow them to "post" and "unpost" invoices and transactions.

A new **Posting** menu option was added to the **Company** menu for users that have full access to the **Posting** privilege. Selecting this will show the Posting window.

To post invoices and transactions that were sent or created in a date range, do the following:

1. Select the companies you want to post for.
2. Enter the date range or a cut-off date.
3. Enter the date you want to show as the posted date on the invoices and transactions.
4. Click **Post…**
5. It will count all of the following that have no posted date yet:
    a. Client invoices with an original sent on date within the date range.
    b. Client invoice charges with a charge date within the date range.
    c. Staff invoices with an original sent on date within the date range.
    d. Transactions with a date within the date range.
6. It will display a message of the count of the above records found so that you can verify the count before the records are posted.

Posting

The posting process will update the following items:

#Client Invoices = 623
#Invoice Charges = 211
#Staff Invoices = 394
#Transactions = 841

Do you want to start the posting process?

Cancel   Start
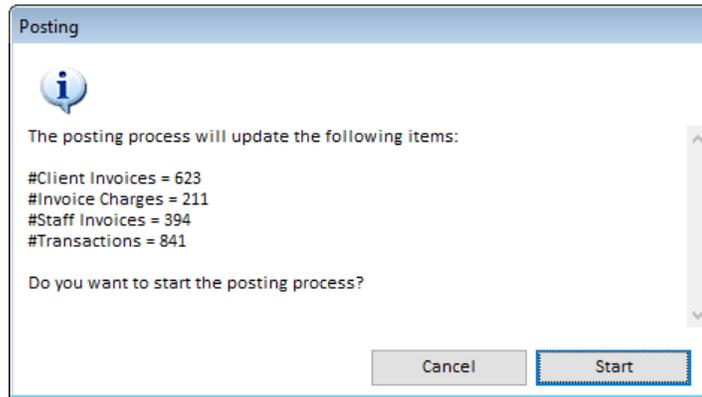
7. Click **Start** to complete the posting process. You will see progress messages display as it processes and a final count when it is finished.

8. It will ask if you want to run the "Posting Audit" report when it is finished. See the **Reports** section below on this new report.

The windows for Client Invoices, Staff Invoices and Transactions will mostly be disabled if it has a posted date. The posted date will show in blue text in the upper right-hand corner of the window. Users that have full access to the **Posting** privilege will see an **Unpost** button on the window if the record is not voided and not paid in full (except transactions). Clicking on the **Unpost** button will remove the posting date from the record. The posting process must be run again in order to re-set the posted date on the record.

The Client Invoice window will now show the date that invoice charges are entered on invoices and they will each have their own posted date as well. You will be able to add invoices charges to an invoice, but will not be able to change or remove existing invoice charges that have been posted.

Invoice Charges	Unpost Remove Add	Printed Description	Charge Date	Posted Date	Charge Type	Charge/%	Amount
Processing/USPS Shipping		USPS	05/30/2014	05/31/2014	Flat Invoice Fee	12.000	$ 12.00
Finance Charge		Finance Charge	11/27/2017		Percentage of Invoice	5.00 %	$ 20.14

Users that have access can unpost a single invoice charge by clicking on the **Unpost** button on top of this list. It will prompt you to select the invoice charge to unpost. It will then remove the posted date on that item and allow you to edit it.

SYSTEM PREFERENCES

- When Solaria calculates due dates and "Include Business Days Only" is checked in preferences, it will now exclude non-working holidays that are on the calendar in its calculations. *[SD-739]*

- If you are integrating with ServiceLink, there is now an option to automatically send changes to ServiceLink without prompting, or to suppress prompts to send changes to ServiceLink. We recommend using the 2nd option to ensure your data in ServiceLink keeps in synch with Solaria. *[SD-793]*

Online Repository Integration   ○ No Integration   ○ DepoManage   ● ServiceLink

Website Address & Port | www.alservicelink.com | 443
Path to Methods | /api
Login Name | SampleAPI
Password | ••••••••
Default Password for New Users | NewUser123
ServiceLink Server Time Zone | MT - Mountain Time
Send to ServiceLink Type | ○ Prompt to Send Changes   ● No Prompt: Always Send Changes   ○ No Prompt: Manually Send Changes

Check Credentials   Synch Lookups   Adjust Work Completed

- The Davinci Meeting Rooms interface option has been removed as this offering is no longer available from Davinci. *[SD-735]*

CATEGORIES AND TYPES

States for countries other than the U.S., U.S. Territories and Canada can now be added and they will be synched up with states and countries in ServiceLink. Note: You must use the same state name and country name as ServiceLink in order to match up the two applications. *[SD-734]*

DIRECTORY DATA

- Merges will now record an internal note on the target record to document the record that was merged into it. *[SD-744]*

- When an expiration date is entered for a client, Solaria will set the expiration date on all of its attorneys and contacts as well. *[SD-722]*

- On cases, leading and trailing spaces will be trimmed off of plaintiff and defendant names after users enter each field for a case caption. *[SD-743]*

- You can now view the **Claim Number** and **Court Name** of a case in the case list window. Click on the "cog" icon button on the top-right side of the list to show either of these fields in the list. *[SD-756]*

- When searching for cases on the case list window, you can now search on many of the different fields for a case. *[SD-756]*

- The assignment number was added to the deponent list on the case details window. *[SD-824]*

- The client list has new fields that can be shown in it: **Effective Date**, **Balance** (if you have access to Invoices) and **C.O.D.**. The client search has new fields that can be searched on as well: Client Type, Address Like, State, Effective date, C.O.D. Only and Balance Between. *[SD-836]*

- The attorney list has new fields that can be shown in it: **Effective Date**, client **Address**, **City**, **State**, **Postal Code**, **Balance** (if you have access to Invoices) and **C.O.D.** The attorney search has new fields that can be searched on as well: Client Name Like, Address Like, State, Effective date, C.O.D. Only and Balance Between. *[SD-837]*

- The contact list has a new field that can be shown in it: **Effective Date**. The contact search now includes a search on Effective date. *[SD-838]*

AUTO FETCH FOR SERVICELINK

- When the Auto Fetch runs and updates data, it will now show the Auto Fetch user selected in Workstation Settings as the user that edits the data instead of the current logged in user. *[SD-821]*

- The Print button on the Auto Fetch window for ServiceLink will now prompt you to print the current list that is showing in the window or the entire list of logs from the past week. (Solaria keeps up to one week's worth of logs in the database.) This may be useful to send to Acclaim Legal Solutions to diagnose any problems. *[SD-780]*

MANUAL FETCH FOR SERVICELINK

- When manually fetching from ServiceLink from the schedule or assignment list windows, you can now select an option to get the client online payments. *[SD-796]*

CALENDAR

You can now have the Manager Schedule view of the Calendar show a checkmark for assignments that have a file on them of a certain file type. This allows you to track whether or not you have received a notice, style of cause or other such file for an assignment. [SD-748]

- On the Assignments tab of System Preferences, a new option was added called "Manager Schedule Check When File Received". Select the file type assigned to the files that you want to track for this new feature.

z

c
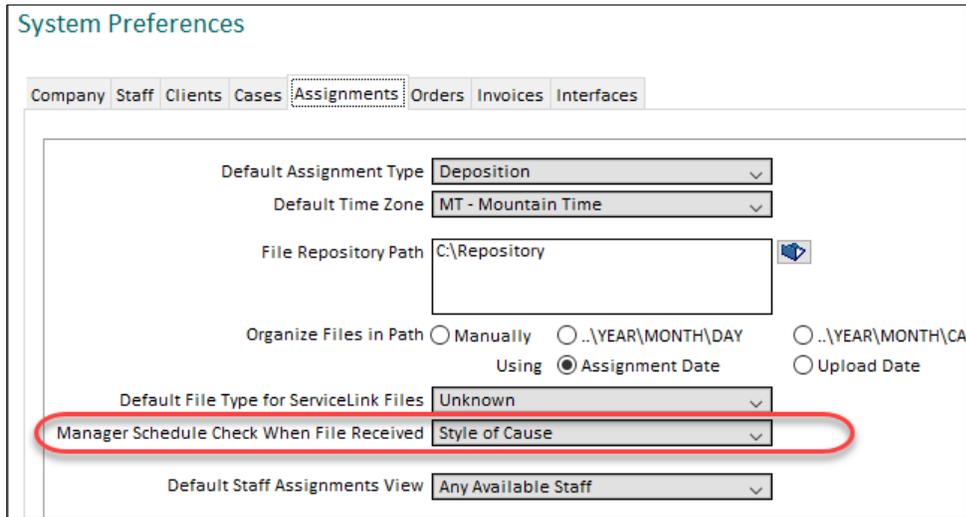
- When viewing the Manager Schedule, a new column will display for that selected file type. Assignments will show a green checkmark in this column if it finds a file of this type on the assignment.


TASK LISTS

When reassigning tasks on the task lists, it will now only allow you to select staff that are also users of Acclaim Solaria. *[SD-732]*

ASSIGNMENT TRACKING BOARD

- The "Staff Progress Tracking" window has been renamed to "Assignment Tracking Board" as it was more commonly referred to. *[SD-789]*
- A new icon was added to the toolbar to go straight to the tracking board. (The icon for Collections was switched with the icon for the tracking board.)
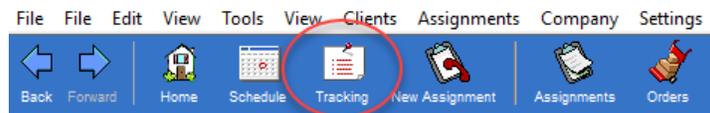
- The tracking board was modified to continue to show tracking items that are not complete even if all staff work has been completed on the assignment and the "Complete Staff Work" task has been completed. You may have tracking items that now show for completed jobs that will need to be marked as completed.
- You can now search for items that are completed by their Completed date. *[SD-795]*

- A **Complete Selected** button was added to the bottom of the tracking board to allow you to select several items and mark them as completed.
- Two new fields can be added to the tracking board list: **Staff Completed On** and **Staff Note**. These will also show on the Staff Progress window. These will be used in a future update of ServiceLink that will allow staff

to mark a tracking item as completed without marking the tracking item as completed in Solaria. They can also enter a note to the company as they are marking an item as completed. *[SD-794]*

ASSIGNMENTS

- The **Deponent** column of the assignments list will now show the scheduled start times next to each deponent name that has a time entered for them. *[SD-731]*

- You can now view the estimated **Length** and/or estimated **End Time** of an assignment in the assignments list window. Click on the "cog" icon button on the top-right side of the list to show either of these fields in the list. *[SD-757;768]*

- The assignment list search now contains a search on the **Affiliate Assignment #** field. *[SD-850]*

- A new text field was added on assignments called **Notation**. This is shown below the **Pre-Order** field on the assignment details page and can be used for any text you want enter up to 255 characters. You can also show this field in the assignments list window. This field can be used in custom confirmations or the standard report text fields as "{Job.Notation}" and can also be used in Word Merges of assignment data. *[SD-814]*

- You can now send/print the staff confirmation for a service on an assignment, even if no staff is assigned to it yet. *[SD-787]*

- When changing the name of a deponent and you are using a Verbatim Hearing Recording company, it will no longer prompt you to be sure you want to change the name. *[SD-758]*

- When a contact in ServiceLink requests an assignment with a state/country that is not in the Solaria database, the state/country will be automatically added when the request is opened. *[SD-767]*

- If an FTP error occurs when downloading an assignment file from ServiceLink, it will check to see if that file has been archived or not. (Files older than 9 months are archived automatically.) If it has been archived, it will request to make the file active again and tell you that the file will be available in 3-5 hours. If the file is not archived, a more friendly error message is displayed explaining possible reasons for the error. *[SD-823]*

ASSIGNMENT TASKS

- When the "Set Status" button is used in the assignment tasks window, it will now show an indicator at the top of the window so that you know that the status must be manually set from that point forward on the assignment. It will also show a note on the assignment that it was set. *[SD-786]*

When viewing an assignment that is already showing the status as needing to be manually updated, you will see an "Auto Status" button at the bottom of the task window. Click on this to switch back to an automatically calculated assignment status. This will also add a note on the assignment that it was set back to calculate automatically.

- Two new types of tasks were added that will be inactive and hidden on assignments until you make them active:

- o **Complete Worksheets**: This was added to show just before the "Complete Staff Work" task. Use this to set the status on an assignment when all worksheets have been completed and to know when the assignment is still waiting for worksheets to be completed.
- o **Complete Tracking Items**: This was added to show just after the "Complete Staff Work" task. Use this to set the status on an assignment when all tracking items have been completed and to know when the assignment is still waiting for tracking items to be completed. This task should not be made required unless you always use tracking items on assignments.
  - ▪ If the task is required: The task will stay incomplete until there are tracking items on the assignment that are marked as "tracked" and have all been completed. (Required = tracking items required)
  - ▪ If the task is not required: It will hold the task as incomplete while there are tracked items on the assignment that are incomplete. It will skip the task if there are no tracked items on the assignment and the next task after it gets completed.

STAFF PROGRESS

- You can now select and copy the text in the note fields on the Staff Progress window. [SD-730]
- The **Check Out Staff Note** will now show any line returns that were entered by the staff in the note in ServiceLink. *[SD-778]*
- You can now add your own tracking items to the tracking list and remove tracking items. Use the **Add** and **Remove** buttons on the top right side of the list. After clicking **Add**, you will be prompted to enter the name of the item. A unique name must be entered for all tracking items. It will continue to show the default 4 tracking items unless you remove them. *[SD-783]*
- When adding new tracking items that are turned on, the "Complete Tracking Items" task will be changed to incomplete if it was already set as complete.
- When assigning a tracking item to a staff person that was on the assignment but has their "Work Completed On" date set, it will ask you if you want to clear out the completed date and thus set the "Complete Staff Work" task as incomplete on the assignment.
- When integrating with ServiceLink and you have saved changes on the window, it will now only send the Check-In/Out Information sections or the Tracking Items section, whichever was updated. This allows you to update tracking items before the assignment date without it requiring the entry of Check-In/Out information. Note: Manually sending to ServiceLink with the "Synch to ServiceLink" button will continue to send all information shown on the window. *[SD-782]*

BACKORDERS

- When saving a new order to an assignment, and all other orders have been shipped or all tasks have been completed on the assignment, you will be prompted if you want to send the assignment back to production or the staff for additional work. *[SD-781]*

- Sending back to either production or the staff will create a tracking item on the assignment with the name you have entered ("Backorder" by default). The "Complete Tracking Items" task on the assignment will be set to incomplete.
- If you have assigned it back to a staff person, the following happens:
  - Their "Work Completed On" date will be cleared.
  - When integrating with ServiceLink, the staff will see that they have a tracking item to complete in ServiceLink.
  - An email message will be sent to the staff. This uses a new "Backorders" option from Standard Report Text. The email message will display, allowing you to modify the information and add instructions for the staff person before sending it.

CLIENT INVOICES

- You can now view the **Posted Date** in the Client Invoice list window. Click on the "cog" icon button on the top-right side of the list to show this field in the list. *[SD-54]*
- You can also search on the **Posted Date** in the Search window for this list. *[SD-54]*
- You can now sort the items on a client invoice so that they will print in the order that you want them. Red arrow buttons were added to the right of the items list.

Click on an entry field within a line then click on the up or down arrow buttons to move that line up or down in the list. By default, the items will be sorted in the order in which they were added to the original order. They will print in the same order that you see on the window. On all existing invoices, the items will print in the same alphabetical order until you modify them plus they will display on the window this way as well. *[SD-747]*

- Grouping of the items on an invoice has been changed when you are using an invoice print type that uses grouping. You can now group on any line item that you would like to and you can have more than one grouping within the items for a deponent. You will also visually see the grouping on the invoice window. *[SD-747]*

Deponent	Remove Add	Product	Clear List Select Template	Units	Unit Type	Qty	Price	Hide	Tax	Amount	
Darling, John		Room Rental-Full Day		1.00	Flat Fee	1.00	$ 475.000	☐	☐	$ 475.00	
Darling, John		Original & One E-Transcript		50.00	Page Rate	1.00	$ 4.250	☐	☐	$ 212.50	
Darling, John		Exhibit Scanned		1.00	Flat Fee	1.00	$ 0.300	☑	☐	$ 0.30	
Darling, John		Digital Signature		1.00	Flat Fee	1.00	$ 2.500	☑	☐	$ 2.50	
Darling, John		Attendance-Minimum Fee		1.00	Flat Fee	1.00	$ 150.000	☐	☐	$ 150.00	

Items hidden (grouped) under the transcript

The "Group" checkbox column has been renamed to "Hide". Check the items that you want to hide and they will be hidden within the visible item that is shown above it. Sort the lines to make sure the hidden items fall under the correct visible item. On all existing invoices, the previously grouped items will be marked hidden and will be sorted below the transcript or copy item on the invoice.

- The **Fax** number field was removed from the **Bill To** section of the invoice. It will now show the preferred print destination in its place. It will show "Invoice Will Be Printed" if it has no preferred destination or will be printed and mailed. It will show "Emails To: [email address]" if it will be sent to an email address. Hover over this to see the full email address it will send to as it may get cut off by other fields to the right of it. *[SD-777]*

- A new preference was added to the Invoices tab of System Preferences called **Manually Mark Invoices Ready to Export to QuickBooks**. This will show an **Export to QB** checkbox on invoices, allowing you to check an invoice when it is ready to export to QuickBooks. An invoice will not be exported unless that is checked. All invoices will continue to export if you do not use the new preference. In addition, the invoice will now show when it was exported, regardless of the new preference. If you uncheck the checkbox, you will be given the option clear the previous export date (if there was one) and the previous export information will be stored in the notes. *[SD-774]*

- A new preference was added to the Invoices tab of System Preferences called **Print "PAST DUE" on Overdue Invoices**. Turning on this preference will print **PAST DUE** in large red letters under the invoice due date and terms on printed/emailed invoices that are overdue. *[SD-773]*

- When an invoice is printed directly to the printer or emailed, it will record this action in the Notes for the order related to the invoice. *[SD-776]*

STAFF INVOICES

- You can now view the **Posted Date** in the Staff Invoice list window. Click on the "cog" icon button in the top-right side of the list to show this field in the list. *[SD-54]*

- Three new search options were added to the Staff Invoice list window Search window: *[SD-726]*
  - Balance between two amounts
  - Next Pay Amount between two amounts
  - Posted Date

TRANSACTIONS

- You can now view the **Posted Date** in the Transaction list window. Click on the "cog" icon button in the top-right side of the list to show this field in the list. *[SD-54]*
- You can also search on the **Posted Date** in the Search window for this list. *[SD-54]*
- You can now filter on the transactions that were made online or offline in the Search window. (This only applies if you are integrating with ServiceLink.) *[SD-755]*

STANDARD REPORT TEXT

- The Standard Report Text window was redesigned to make it easier to read the different sections. In doing so, an **Email Subject** field was added to each report type to allow you to enter your own text for the subject of each email sent. Default subjects have been entered for each report type for each company. *[SD-792]*
- In addition, you can now enter field codes into each report field. Click on the **{X}** button next to each field to see a list of field codes available for that report field. The pop-up window also allows you to insert a selected field right into the text of the report field.

Report Text Field Code List

```
Company.Name
Job.JobID
Job.ServiceLinkJobID
Job.Date
Job.Time
Job.TimeOrdered
Job.SpecialInstructions
Job.OpposingCounsel
Job.DeliverBy
Job.DeliveryType
Job.PreOrderInfo
Job.AffiliateJobNumber
Job.Length
Job.Type
Job.Location
Job.LocationCity
Job.LocationState
Job.Location.Map
Job.RescheduledCanceled
Job.ScheduledBy
Job.PreviousAppearances
Job.PreviousOrders
Job.TrackingItems
Job.Client.Name
Job.Client.OrderRemarks
Job.Client.Address
Job.Attorney.Name
Job.Attorney.Phone
Job.Attorney.CellPhone
Job.Attorney.Fax
Job.Attorney.Email
Job.Contact.Name
Job.Contact.Phone
Job.Contact.CellPhone
Job.Contact.Fax
```

[Insert]   [Print]   [Close]

REPORTS

If a report/list shows the "Excel" print destination as an option, it will now also show a "Tab File" print destination. This allows you to print to a simple tab-delimited text file instead of an Excel worksheet. Printing to the tab file is faster and can still be opened in Excel. *[SD-831]*

STATEMENTS

- Client, attorney and case statements will now show the word "Date" after the "Assignment" column name to indicate that the data in it is for the assignment date. *[SD-759]*
- Statements run from Reports have been re-worked to be more efficient and provide additional options for printing to Preferred Destinations. They will now prompt you for the report criteria first. *[SD-799]*

Next, they will show a list of items that have an invoice balance and match the report criteria. This window will also have additional options for printing to the Preferred Destination depending upon the statement type.

The Preferred Destination for each client/attorney will show in a separate column, displaying either their email address they want it sent to or "Printed" if no email address given.

When printing to the Preferred Destination, you also have the option to only create printed or emailed statements. Emailed statements can also be "batched" so that it will send a certain number of emails before pausing between batches.

Statement files will also be named uniquely using the record ID of each item and stored in the local AppData folder until the next print job runs.

ASSIGNMENTS

Assignments Processed per Scheduler: This new report lists each scheduler and their statistics on assignments scheduled, rescheduled, and canceled in a date range. It has the option to group by month, group by year or print totals only. It can also be exported to Excel or a tab file. *[SD-825]*

Assignments Received: When using assignment counts on assignments for rooms, meals and reporters, you will now see these listed on this report with each assignment. A total count will be shown at the bottom of the report. *[SD-746]*

Assignments Scheduled: When using assignment counts on assignments for rooms, meals and reporters, you will now see these listed on this report with each assignment. A total count will be shown at the bottom of the report. *[SD-746]*

Conference Room Usage: This new report lists the time used in conference rooms on completed assignments in a date range. It uses the earliest deponent start time and latest end time to calculate this. It can also be exported to Excel or a tab file. *[SD-815]*

Import Verbatim Hearing Recording Assignments: This import of assignments can now be run more than once without creating duplicate assignments. It will look for an assignment matching the date, client and case before creating new assignments and update any existing assignments it finds for the location and hearing times. *[SD-725]* In addition, dockets imported will now show the hearing time as the deponent name instead of "TBD". *[SD-801]*

ORDERS/PRODUCTS

Billings by Production User: This new report lists the statistics on each assignment that production users have worked on and shipped orders on. *[SD-844]*

Invoice Charges: This report now includes a summary and detailed option. The summary option prints as it has with a total of each invoice charge used in the date range. The summary report prints all invoice charges with their invoice number, charge date, paid date, description amount due, amount paid and balance. Each report uses the invoice charge date if using accrual basis in preferences and the paid date if using cash basis in preferences. This report can now be exported to Excel or a tab file. *[SD-736]*

Pages Produced per Month: This new report lists the number of transcript original and copy pages produced on orders that were shipped during a date range. It shows these totaled per month and per year. It can also be exported to Excel or a Tab File. *[SD-835]*

Production Turnaround per Month: This new report lists the average number of days production employees take to ship the first order after the worksheet is completed during a date range per month. *[SD-846]*

Product Sales: This report can now be exported to Excel or a tab file. *[SD-852]*

CLIENTS

Assignments Scheduled: A drop-down list of client types was added to the report options window for this report. It allows you to filter the client selection list for a specific client type, and thus print the report for assignments that were scheduled for clients of a specific client type. The client type was also added to the report to the right of the client name. *[SD-760]*

Assignments Taken: This report can now be printed to Excel or a tab file and has a summary vs. detailed version. The summary version prints as it has in the past. The detailed version lists assignments per caller and includes amount billed on each assignment with totals per attorney. *[SD-811]*

Income by Client: This report can now be exported to Excel or a tab file. *[SD-852]*

Income by Client by Assignment: This report now includes the amount paid out to staff for commissions and non-commissions with the total profit on each assignment. It can also be exported to Excel or a tab file. *[SD-822]*

ATTORNEYS/CONTACTS

Email Invoices in Batch: This report option will now only show the attorneys with outstanding invoices and send to their preferred destination, if set. When using Outlook and previewing emails, you can also set the batch size to send at a time, similar to statements. *[SD-834]*

New Attorneys with First Assignment: This new report lists attorneys created on or after a date along with the information from their first assignment they scheduled (if any). It can also be exported to Excel or a tab file. *[SD-841]*

STAFF

Service History: An option to include the case caption was added to this report. If included, it will print below the service on each job. *[SD-813]*

Staff Payables: Two fields were added to the Staff Payables report: 1) the Assignment # will show on each invoice line and 2) the Check # will show on invoices that are paid. *[SD-816]*

Staff Turnaround per Month: This new report lists the average number of days staff take to complete their worksheets during a date range per month. *[SD-842]*

FINANCIAL

All financial reports can now be exported to Excel or a tab file. *[SD-829]*

Accounts Receivable: This report will now subtract out invoice charges that were added after the cut-off date you enter for the report, allowing you to see the amounts due on invoices prior to the current date. It uses the new **Charge Date** on the invoice charges to determine this. *[SD-738]*

Amount Billed by Location: This new report lists assignments within a date range and the amount billed on each subtotaled by location (either by state or state-city). *[SD-540]*

Export to QuickBooks: A new option was added for Verbatim Hearing Recording companies to export VHR Parent Invoices. This will create a QuickBooks ".iif" file containing clients with dockets within the entered date range and the total of the invoices for these dockets. *[SD-699]*

Posting Audit: This new report lists all invoices, invoice charges and transactions that were posted on a specific date.

Unposting Audit: This new report lists all invoices, invoice charges and transactions that were unposted by someone in a date range.

Total Business: This report now has the option to run it by Caller (and optionally grouped by Client). *[SD-810]*

EDIT LOG

- The Edit Log can now be printed to Excel or a tab file. CTRL+P will show a print destination of "Excel" or "Tab File" to choose from. It will send the currently displayed list of the edit log to an Excel file or a tab file. *[SD-818]*
- You can now filter on the Tracking Items for an assignment in the Edit Log. Click "Filter" and select "Assignment + All Related Data" or "Tracking Items" to show the changes to tracking items for an assignment. *[SD-818]*

ISSUES RESOLVED

- **Home:** The **Average Assignments Per Day for Past Month** statistic on the Home window will now only count assignments up through yesterday (instead of including future assignments in it). *[SD-827]*
- **Categories and Types:**
  - **Product Prices:** If you have more than 10 delivery types and print the product prices, it will now print the report correctly. *[SD-797]*
  - **States:** If a duplicate state code, it will now show a friendly error message instead of a SQL error message. *[SD-762]*
  - **States:** If you change the state code of a state that has already been used on an address, it will now show a friendly error message instead of a SQL error message. *[SD-763]*
- **Calendar:**
  - When adding time off for staff, it will no longer show expired staff to select from. *[SD-742]*
  - Saving changes on the Schedule Manager view with no assignment selected will no longer try to save anything, which previously resulted in a SQL error. *[SD-849]*
- **Directory Data:**
  - When adding a new attorney and entering a note for them, it will now save the note when the attorney is saved. *[SD-817]*
  - Merging of attorneys will now only allow merging of attorneys within the same client if you are integrating with ServiceLink. *[SD-745]*
  - The contact list will now display '&' correctly in client names. *[SD-800]*
  - The calendar button next to the Birthday field on the Contact Maintenance window was fixed to display properly. The tabbing order of the fields on this window were fixed as well. *[SD-803]*
  - Printing the Contact details window will no longer return an error. *[SD-828]*
  - When viewing the search results for a directory data list (e.g. Clients list) and no search criteria has been entered, it will now show the correct column headings. *[SD-847]*
- **Assignments List:** Selecting a specific status of assignments to display in the assignments list window will no longer include canceled assignments. *[SD-788]*
- **Notes:**
  - Notes that are extremely long will no longer show a blank line in the note summary lists. *[SD-798]*
  - When checking the "Include Inactive" checkbox on the Notes window, it will no longer duplicate the notes listed. *[SD-802]*
- **Assignments:** Typing in a date before today above the calendar on a new assignment will now prompt you to confirm that you want to select the date entered. *[SD-809]*
- **Staff Assignments**:
  - If a service is selected that does not use staff on it and the user clicks on the Send Message button, a message will display indicating that it cannot send a message as no staff are used on the service. *[SD-720]*
  - When sending the staff confirmations that show the Previous Orders section, it will no longer include items that are hidden/grouped under another item on the previous order. *[SD-779]*
- **Staff Progress:** An issue with staff progress showing for staff that are assigned to services that have progress tracking turned off was resolved. [SD-819]
- **Tracking Items:**

- o The staff shown in the Responsible Staff drop-down list for tracking items will only include staff that are active and their login user is active as well. *[SD-805]*
  - o When the "Transcript" tracking item is turned on either manually or automatically and the deliver by date is in a month numbered less than the assignment date month, it will now correctly calculate the due date for the tracking item. *[SD-851]*
- **Orders:**
  - o If you try to print from the order window when no saved order is displayed, a friendly error message will display indicating that no order has been entered or saved yet to print. *[SD-770]*
  - o When sending orders to ServiceLink and there is no ordering attorney, it will now send the billing attorney if the ordering and billing clients are the same to prevent the error "Contact ID should not be empty". (The ordering attorney is required in ServiceLink.) If there is no billing attorney or the clients are different, a more friendly error message will be returned explaining that no ordering attorney was found on the order. *[SD-820]*
  - o If a transcript-related flat fee product is selected for a deponent on an order or invoice and the deponent is changed to "Other", it will now properly clear out the line item fields and not allow you to save until a new product is selected. *[SD-839]*
  - o When sending orders to ServiceLink and the Ship To client and address are the same as the ordering client and address but the attorney is different, it will now show the correct shipping information in ServiceLink. *[SD-843]*
- **Client Invoices:** After adding a new client and attorney for the billing information on an invoice, it will no longer return a SQL error. *[SD-753]*
- **Staff Invoices**:
  - o When manually entering a new staff invoice, the **Next Pay Amount** will show properly after saving the invoice. *[SD-729]*
  - o The **Net Profit** shown at the bottom of the staff invoice window will now be calculated correctly when there is a negative profit. *[SD-764]*
  - o When doing split pay for staff and one of the invoice buckets is paid in full then another item is added for that bucket, it will remove the paid on date for that bucket so that the new item will show on the Payables report. *[SD-804]*
- **Assignment Files:** When downloading, opening, deleting or emailing an assignment file that is only stored in ServiceLink, it will always download the file instead of looking to see if the file already exists in the target folder. This prevents the problem of it using a file that is named the same but is for a different assignment. *[SD-833]*
- **Assignment Tasks:** Double-clicking on the "File Originals" task will now take you to the Deponent Update window. *[SD-769]*
- **Reports:**
  - o **Clients → Verbatim Hearing Recording Invoice Export:** This report will now sort the items printed by docket date, call order number, then hearing time. *[SD-772]*
  - o **Staff → Payables:** If a client payment that affects staff pay is entered between the time the Payables report is run and payments are made to staff, it will no longer include that additional staff pay in part of the staff payment. *[SD-724]*
  - o **Staff → Staff Pay by Assignment:** This report was fixed to only include payments on staff invoices as it was including payments on client invoices that had the same invoice number as a staff invoice. The staff names on the report will also be listed by last name first even if names are stored as first name first. The report can now also be exported to Excel or a Tab File. *[SD-761]*

5.40.033

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ENHANCEMENTS

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Assignments List: The **Deponent** column of the assignments list will now only show the scheduled start times for Verbatim Hearing Recording company assignments. *[SD-859]*

Assignment Files: The window to add files to an assignment has been modified to list folders and files in separate lists as it did before Solaria 5.30. This is to reduce time needed to load drives and folders containing many GB of files. *[SD-858]*
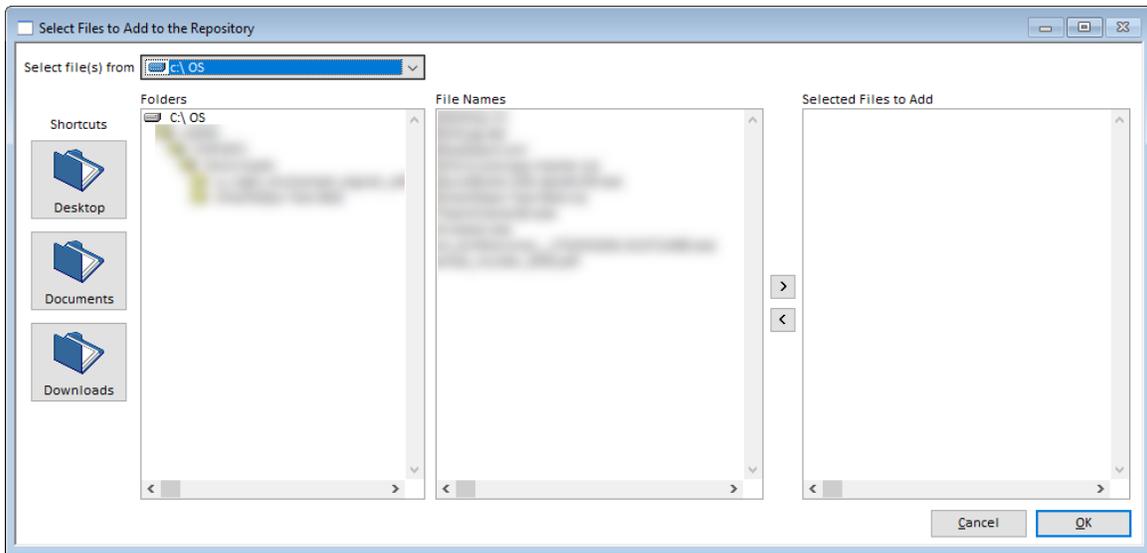
ISSUES RESOLVED

- **Assignments:** When sending assignments to DepoManage, it will now send the first Staff Work Completed On date that is entered on the assignment to show that the assignment was turned in correctly. *[SD-862]*
- **Assignment Files:**
  - When adding files using the "…\YEAR\MONTH\DAY" folder structure in preferences and using the "Upload Date" option, it will now create the "DAY" folders using the current date instead of the job date. *[SD-856]*
  - When emailing, downloading, opening or deleting a file that has been sent to ServiceLink but is also in the Solaria file repository, it will no longer give a message that the file must be downloaded first. *[SD-857]*
- **Attorneys Present:** After removing two or more attorneys from Attorneys Present that were previously sent to ServiceLink, it will no longer report a SQL error. *[SD-861]*
- **Orders:**
  - When using the **Copy Order** button to copy an order, it will now save the order items correctly on the order. *[SD-855]*
  - Changes to orders or new orders created will no longer update staff invoices that are posted. *[SD-863]*

5.40.037

ENHANCEMENTS

- **Menus:** A **Print Window Screenshot** option was added to the **File** menu. Selecting this will take a screenshot of the main window that is displayed in Solaria. (It cannot take any screenshots of pop-up windows that display, however.) *[SD-870]*
- **Assignments:** After changing the delivery type on the Assignment Details or Staff Progress windows and there is already a deliver by date entered, you will be asked if you want to use the new calculated date or not. This way you can override either the delivery type or the deliver by date if they need to be "disconnected". *[SD-875]*
- **Reports:**

- o All reports (except statements, invoices, orders, receipts and confirmations) will now have the option to print to a Tab File or Excel. *[SD-853]*
- o The **Staff Payables Audit** report column headers were modified to clarify what the last two columns are for: Client Paid On and Staff Amount Paid. *[SD-872]*

ISSUES RESOLVED

- **Categories and Types:** Printing from the Product Pay Templates window will now print for the first 10 delivery types shown and will complete the report correctly when you have more than 10 delivery types. *[SD-866]*
- **Assignments List:** The Rooms, Meals and Reporters columns will be hidden if the **Use Room, Meal and Reporter Counts** option is turned off in System Preferences. *[SD-871]*
- **Assignments:** New location addresses brought in by an assignment request from ServiceLink will now default their effective dates to the current date and their expiration dates to null (empty). This was causing issues with the addresses showing on the ServiceLink assignments. *[SD-974]*
- **Transactions:**
  - o When payments are made online and fetched into Solaria, they will now distribute the amount paid to negative invoice charges (e.g. discounts) correctly if the total amount paid equals the amount due on the invoice. *[SD-867]*
  - o Receipts to pay staff from the Payables report when using split payments for staff will now show the correct amounts on them. *[SD-876]*
- **Reports:** The **Non-Requesting Attorneys** report will now show the client addresses below the client names as it should. *[SD-869]*