

5.41 Release

ENHANCEMENTS

REPORTS

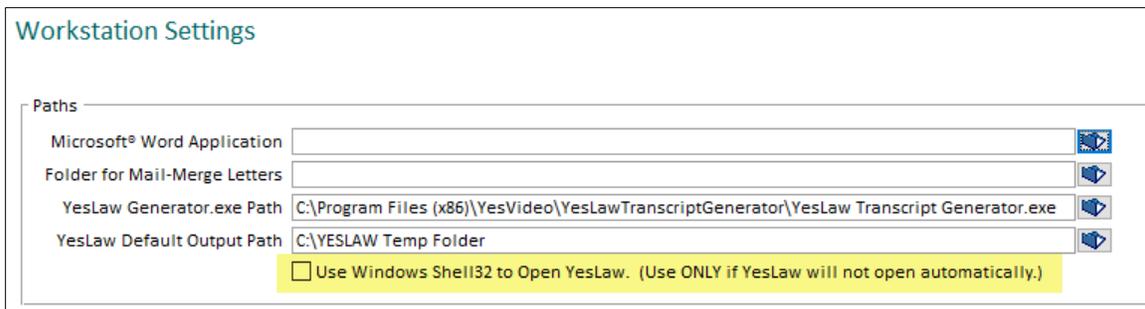
- When printing statements, the default date ranges will have an ending date of today instead of the end of the current month to exclude invoices that are not due yet. [SD-865]
- The **Billings by Production User** report now includes the order completed on date. [SD-880]
- The ClientID field was added to the **Accounts Receivable** report when you export it to Excel or a Tab File. [SD-883]

ASSIGNMENTS

- The prompt to replace the deliver by date with a new calculated date will now only occur when you change the delivery type. [SD-885]
- Client invoices will now show a tooltip of "View Receipts for Invoice" when hovering over the money icon button next to the amount paid. Staff invoices will show a tooltip of "View Payments for Invoice" on this button. This is to clarify that clicking on the button will show you the receipts or payments that were made for the invoice. [SD-888]

MISCELLANEOUS

- When you open the **ServiceLink Auto Fetch** window, it will now show all of the current day's logs instead of just the logs since Solaria was last opened. [SD-887]
- A new checkbox was added to **Workstation Settings** to open YesLaw using a different command. This can be used if YesLaw fails to open from the **Assignment Files** window using the **Create YesLaw Files** button. [SD-908]



The screenshot shows the "Workstation Settings" dialog box. It has a title bar "Workstation Settings" and a "Paths" section. The "Paths" section contains four text boxes with browse buttons (blue folder icons) to the right:

- Microsoft® Word Application
- Folder for Mail-Merge Letters
- YesLaw Generator.exe Path: C:\Program Files (x86)\YesVideo\YesLawTranscriptGenerator\YesLaw Transcript Generator.exe
- YesLaw Default Output Path: C:\YESLAW Temp Folder

Below these text boxes is a checkbox labeled "Use Windows Shell32 to Open YesLaw. (Use ONLY if YesLaw will not open automatically.)". The checkbox is currently unchecked.

ISSUES RESOLVED

Directory Information

- Whenever addresses, cases and clients are saved now throughout Solaria, the text fields will be stripped of carriage returns, line feeds and tabs (except for multi-line note-type fields). This is to prevent problems when viewing these items in ServiceLink [SD-892]

Tracking Board

- If the "Complete Worksheets" task is not active for an assignment, the tracking board will continue to show worksheets that need to be completed for it until the "Complete All Staff Work" task is completed (if required), even after an order has been created on the assignment. [SD-891]

Assignments

- When viewing the details for the pages due for a staff person on an assignment, it will no longer include assignments that have the "Work Completed On" date entered for the staff. [SD-893]
- After making changes to an assignment that indicate the assignment was rescheduled (such as a change to the date or time), it will now correctly prompt you to keep confirmations or not. (This had stopped working in 5.30.) [SD-897]

Orders/Invoices

- Returning to an order or invoice on an assignment from another area of Solaria using the **Back** button will display the correct order/invoice. [SD-878]
- When taxes are partially paid on a client invoice, the **Recalc** button will include that amount in the calculations. Also, future transactions will show the unpaid tax amount correctly in the transaction splits window. [SD-882]
- The **Receive Payment/Pay Invoice** button will now show on a posted client/staff invoice if the invoice has not been paid in full. [SD-886]
- When voiding a staff invoice that is also in Servicelink, it will now prompt to send/send the voided invoice to Servicelink after it has been voided. [SD-884]
- When using the **Split Staff Pay by Product Type** option for staff pay and you have turned off the **Non-Guar: Pay If Client Paid** checkbox at the top of a staff invoice, it will now include the copy and miscellaneous balances in the **Next Pay Amount** to pay on the invoice. [SD-889]
- When saving an existing order that staff were already paid on but they have another open invoice due to a backorder, the existing order items will no longer be added to the open staff invoice. [SD-903]
- Printing "Past Due" on invoices will now work correctly when the payment due date month is greater than the current date month. [SD-905]
- When printing a staff commission invoice to the Email destination, it will now attach the invoice PDF file to the email message. [SD-906]

Reports

- When printing the **Invoice Charges** report to Excel using the "Detailed" option, it will now populate the Excel file correctly. [SD-898]
- The **Income by Client by Job** report will now include copy and miscellaneous amounts paid on staff invoices when Solaria is set up to do split pay for staff. [SD-894]
- The **Top 10 Staff** report will now print correctly when using the **Cash Basis Accounting Method** in System Preferences. [SD-881]