Acclaim Solaria 5.50 Release Notes

5.50 Release

WORKSTATION SETTINGS

- A new option was added to the **ServiceLink** section of Workstation Settings that shows if you are integrating with ServiceLink. By default, it matches the system setting for the type of synching to do with ServiceLink. It allows you to switch the type of synching you want to do for the current session while you have Solaria open. Once you log off or close Solaria, it will return to the system default. This only affects you – it does not affect others using Solaria. *[SD-913]*

MY SETTINGS

New settings were added to My Settings. Select **Settings → My Settings** to view your own settings. (These are set for each user regardless of the workstation they are on.)

- A setting for searches was added to set the default number of items to limit the results list to. The first time you go to search in a list window for the current session, it will use this default number. You can change this on each list and it will be remembered for each list during the current session or until you click on the **Clear** button on the search window. *[SD-926]*
- A checkbox to remember whether you want to view internal notes in the notes window or not was added. It is a permanent checkbox that will be remembered from session to session. This same checkbox will show at the top of the Notes window:
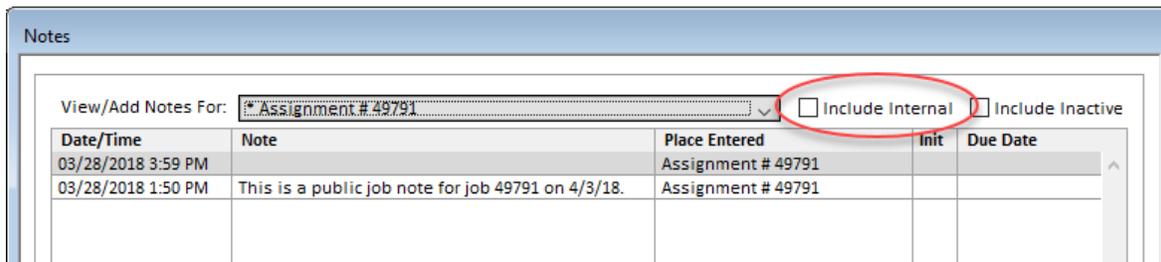
By default, this checkbox will be turned off and all internal notes will be hidden. When you turn it on in My Settings or on the Notes window, it will show internal notes and will remember this throughout Solaria until you turn the checkbox back off. *[SD-927]*

CATEGORIES AND TYPES

- The **System** column has been removed from the windows under **Settings → Categories and Types** so that no one accidentally sets an item to "system" and then cannot change or remove it later. The existing "system" items will show as disabled and cannot be removed. [SD-929]

DIRECTORY DATA

- A **Website** field was added to the top of the Client maintenance window which will allow you to enter the website URL for a client. Click on the **Go** button next to it to open your browser to that website. *[SD-909]*


- A new search option of **Trial Date** was added to the case list window to search for cases that have a specific trial date. *[SD-922]*

ASSIGNMENTS

- Two new columns were added to the assignments list: **Court Docket** and **Taken By**. These show the case court docket number (using the name in your language settings) and the name of the user that entered the assignment. Click on the cog icon in the top, right corner of the window to turn see these column in your list. *[SD-923,SD-925]*

- New search options were added to the assignments list: **Service Area** to find assignments in a specific service area, **Trial Date** to find assignments with a case that has a specific trial date and **Called In Date** to find assignments that were called in on a specific date . *[SD-922,SD-924,933]*

- You can now enter notes on canceled assignments. *[SD-915]*

- You can now modify/append to the note that is automatically created when you change the date of an assignment. The rescheduling notes will also be set as "Internal" by default. *[SD-920]*
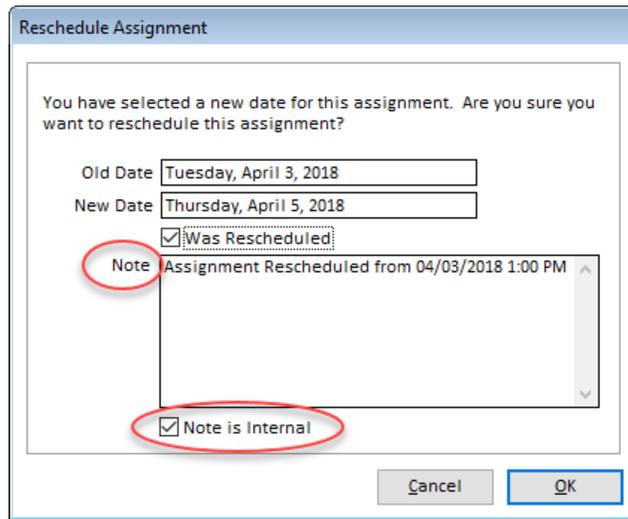
- When adding files to assignments, the list of files will now include the last modified date of each file in addition to the file name. Both the name and modified date columns can be sorted on by clicking on the column names. *[SD-930]*
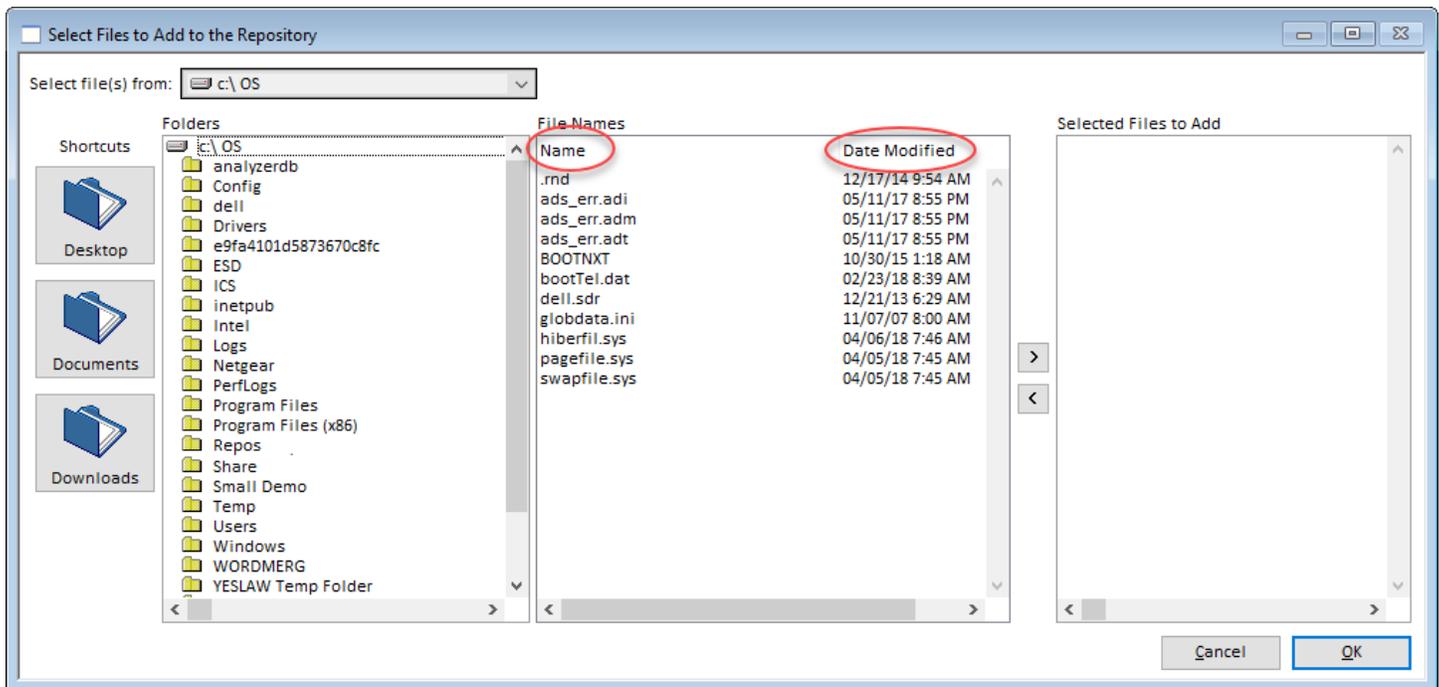
- Contacts that should be copied on their attorney's emails will now be copied when the **Email Files** button is used on the assignment files window to email files to an attorney. *[SD-928]*

ORDERS

- Two new columns were added to the orders list: **Ordered On** and **Shipped On**. Click on the cog icon in the top, right corner of the window to turn see these dates in your list. *[SD-912]*

- Two new search options were added to the orders list:
  - **Client Name** to find orders for a specific client *[SD-932]*
  - **Trial Date** to find orders for a case trial date. *[SD-922]*

- When integrating with ServiceLink and viewing the Orders list window, there is now a separate **Pending** status on the left panel to select all pending orders in a delivery by date range. Pending orders will also show when you select **All Statuses**. Note: pending orders with no deliver by date will not be displayed here since the list is filtered by this date. *[SD-657]*

- When integrating with ServiceLink, you will now see notes on the pending orders that came in from the staff worksheets on each order. This is shown at the bottom of the split view when showing the pending order. Staff can begin entering notes on worksheets in the next update of ServiceLink (3.7). *[SD-902]*

INVOICES

- Two new search options were added to the invoice list window search.
  - **Has a Payment On** allows you to find invoices that have a payment on a specific date. *[SD-860]*
  - **Salesperson** allows you to find invoices where a specific person is a salesperson on them. *[SD-918]*
- An **Attorney** column was added to the invoice list to show the billing attorney on each invoice. Click on the cog icon in the top, right corner of the window to turn on this column in your list. *[SD-917]*
- The selection list to add pre-defined **Printed Comments** to an invoice will now allow you to select multiple comments at once. The selected comments will be added to the end of the existing **Printed Comments** instead of replacing the text that was there. *[SD-914]*

REPORTS

- When printing statements, you will now have the option to include invoices when emailing or printing statements to individuals. When prompted for statement options, select the **Include Related Invoices with Printed/Emailed Statements** checkbox. Invoices that are listed on the statement will be printed right after the statement is printed or attached in a single PDF file to the email message along with the statement PDF file. *[SD-904]*

VERBATIM HEARING RECORDING CHANGES

- When using a Verbatim Hearing Recording company, an **Assign V.H.R.** button will be shown at the bottom of the Dockets list window. You can select multiple dockets then click on the button to assign a VHR to the selected dockets. *[SD-899]*

- The VHR Progress and Hearing Update windows have been updated to only show the fields used by a VHR company. *[SD-900]*
- New fields called **Contract #** and **Task Order #** were added to the Client maintenance window.

- The VHR Invoice Export will now export the new client fields mentioned above and sort the data by date then Call Order Number. It will do subtotals by Call Order Number and all subtotals and totals will use formulas to ease manual updates to the spreadsheet. *[SD-896]*
- Printed staff invoices for VHR companies will now suppress the **First Client Invoice Sent On** date and show **Check Processing Date** instead of **Pay Due On**. *[SD-931]*

ISSUES RESOLVED

Settings

- After creating a new product pay template while two instances of Solaria are open to the Product Pay Templates window, then using the **Copy Rates** button in the other instance, it will no longer return a SQL error when it tries to copy the rates. *[SD-936]*

Calendar

- If no deponent is on an assignment request from ServiceLink and the calendar is set to show deponent names for each assignment, the calendar will now show "(No Deponent)". *[SD-940]*

Tracking Board

- When viewing completed worksheet items in the tracking board, it will now include worksheets completed on the same date as the ending date entered in the filter at the top of the window. *[SD-944]*

Assignments

- When entering a caller name first on a new assignment and they are associated with a single client and attorney, it will now fill in both client and attorney names on the assignment automatically. Also when entering an attorney after the caller, the caller will remain on the assignment. *[SD-937]*
- After rescheduling an assignment and choosing the option to clear all confirmations, the confirmation tasks will now be marked as incomplete. This will put the correct status on the assignment in case further tasks were completed and those tasks are required. *[SD-907]*
- When determining the staff that get commissions on an assignment, it was in some places using the current date instead of the assignment date compared to the commissions start and end dates. Solaria has been updated to consistently use the assignment date to determine which staff get commissions on an assignment. *[SD-919]*
- When removing an attorney from Attorneys Present and Solaria is integrating with ServiceLink, it will no longer return a SQL error. *[SD-935]*

Invoices

- Staff invoices will now be correctly assigned to the same company that their assignment is under when worksheets are brought in from ServiceLink and they are for an assignment with a different company other than the current company showing in Solaria. (This was affecting payroll being run for specific companies.) *[SD-943]*

Receipts

- When saving a receipt where not all invoices shown were selected to be paid, it was sometimes showing a duplicate of an invoice on the window while it was saving. This has been fixed. *[SD-934]*

Collections

- If an invoice payment is voided and the invoice was in a completed collection, the collection will be updated to show that the collection is once again incomplete. *[SD-916]*

Reports

- Client and attorney statements printed for a date range will now print the details of invoices paid beneath each payment line item. *[SD-912]*
- The **Payments Received** report was adjusted to wrap the memo or client name so that it will not write over the amount. *[SD-911]*