# Acclaim Solaria 5.60 Release Notes

5.60 Release

SYSTEM WIDE CHANGES

- The title of order/invoice remarks was standardized to "Invoice Remarks" across all windows and all links to show the remarks and files related to an object will now show "Invoice Remarks/Files". Some links may have been moved on the window slightly due to spacing requirements for the text shown. *[SD-968]*
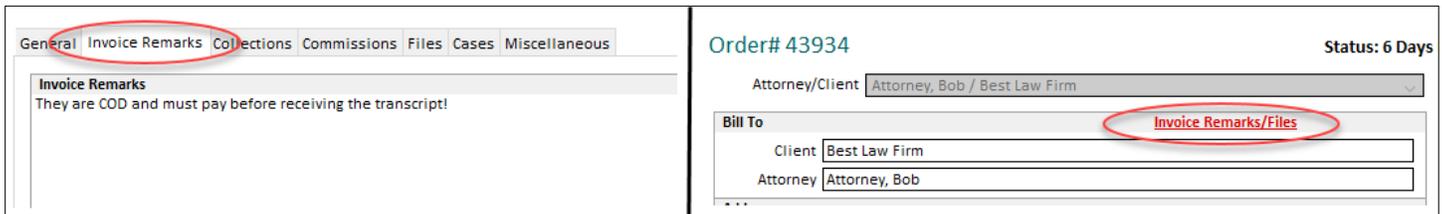
- When deponents are listed for an assignment, the deponents will be listed in order by scheduled start time then full name. Deponents without scheduled start times will be listed after those with scheduled start times. *[SD-985]*

COMPANIES

- When integrating with ServiceLink and you add a new company to Solaria, it will now prompt you to set up a division in ServiceLink with the same name then re-save the company so it can link them. *[SD-1003]*

- A new drop-down list will show on the Company maintenance window to select a company **Type**. This has the options of "Court Reporting" and "Verbatim Hearing Recording" and replaces the **Is VHR Company** checkbox that was on the window previously. Assignment types, case types and services can now be set up separately between the two company types and will be shown on those settings windows if you have any VHR companies. When entering assignments, the assignment type, case type and services will be limited to the items that have the same company type that is for the assignment's company. *[SD-1002]*

ACTIVITY LISTS

- The **Remove Note** button was renamed to **Delete Note** on the My Reminder Notes window. A more detailed warning will display when you click on this to confirm that you want to permanently delete the note from the system. It now suggests using the **Note Finished** button if you just want to remove it from your list but keep the note on the item it is attached to. Is will also delete the note in ServiceLink now if it had been sent to ServiceLink. *[SD-806]*

- The searches for the main list windows were updated to allow searches on most dates using a date range instead of having to search on a specific date. For example, searches on **Assignment Date**, **Trial Date** and **Posting Date** can now be searched on using a date range. *[SD-945]*

- You can now search on the last **Edited On Date** for the items that are displayed in each of the main list windows. This was added to the search windows for each list where you can enter a date range. This will find items that were last modified by someone in that date range. *[SD-959]*

- A new column called **Salesperson** was added to the Assignment, Client, Attorney, Contact and Case list windows. Click on the "cog" icon in the top right corner of each list to add the column to it to see the assigned staff that get commissions on that item. *[SD-972]*

- Two new columns were added to the Client list window: **Oldest Invoice Date** and **Credit Limit** (a new field for clients). Click on the "cog" icon in the top right corner of the list to add the columns to the list. The **Oldest Invoice Date** will show the oldest invoice date for any unpaid invoices for each client. This column

was also added to the search window so that you can search for a date range of oldest invoice dates. *[SD-979,980]*

- Two new columns were added to the Attorney list window: **Oldest Invoice Date** and **Credit Limit** (a new field for attorneys). Click on the "cog" icon in the top right corner of the list to add the columns to the list. The **Oldest Invoice Date** will show the oldest invoice date for any unpaid invoices for each attorney. This column was also added to the search window so that you can search for a date range of oldest invoice dates. *[SD-1000]*

- A new column called **Staff Type** was added to the Staff list window. Click on the "cog" icon in the top right corner of the list to add the column to it. This column was also added to the search window so that you can search for all staff of a specific type. *[SD-955]*

- A new column called **Worksheet Completed On** was added to the Assignment Tracking Board list window. Click on the "cog" icon in the top right corner of the list to add the column to it. This will show the date the worksheet was completed by the staff person assigned to the item shown. *[SD-978]*

STAFF MAINTENANCE

- When a guaranteed pay type is selected for a staff person, the **Non-Guar: Pay If Client Paid** checkbox will now be disabled because it only applies to non-guaranteed pay types. *[SD-1010]*

CLIENT/ATTORNEY BILLING

A new window referred to as the "Billing" window was added to the client and attorney maintenance sections of Solaria. When you are viewing the details of a client or attorney, you will see **Billing** listed in the options tab under their name if you have access to the **Invoices** privilege. *[SD-982,1000]*

Clicking on it will display the client or attorney Billing window. This shows high level information about the client or attorney at the top, including their latest payment and balance information as well as a new **Credit Limit** field that can be entered for each client/attorney.

Best Law Firm

Client Information

Client#: 8901		Direct: 303-123-9765
Warning:		Toll-Free: 808-123-9765
Invoice/Statement Preferred Destination: joann@bestlawfirm.com		Fax: 303-123-9766

Billing Information

Credit Limit $ 6,000.00	Oldest Invoice Date: 06/29/2016	Paid in Last 30 Days:	$ 1,061.80
Current Balance: $ 9,734.20 Other Companies: $ 0.00	# Future Assignments: 3	Paid Year-to-Date:	$ 3,897.24

	Invoice#	Sent Date	Due Date	Assignment	Case	Attorney	Amount	Paid	Balance
☐	48717	06/29/2016	06/29/2016	06/15/2016	Earl Hawkins v. McDade's	Attorney, Bob	$ 217.75	$ 100.00	$ 117.75
☐	48718	06/29/2016	06/29/2016	06/15/2016	Earl Hawkins v. McDade's	Attorney, Bob	$ 217.75	$ 50.00	$ 167.75
☐	48719	06/29/2016	06/29/2016	06/15/2016	Earl Hawkins v. McDade's	Attorney, Bob	$ 217.75	$ 0.00	$ 217.75
☐	48720	06/29/2016	06/29/2016	06/15/2016	Earl Hawkins v. McDade's	Attorney, Bob	$ 217.75	$ 0.00	$ 217.75
☐	48721	06/29/2016	06/29/2016	06/15/2016	Earl Hawkins v. McDade's	Attorney, Bob	$ 217.75	$ 0.00	$ 217.75
☐	48722	06/29/2016	06/29/2016	06/15/2016	Earl Hawkins v. McDade's	Attorney, Bob	$ 217.75	$ 0.00	$ 217.75
☐	48725	06/29/2016	06/29/2016	06/15/2016	Earl Hawkins v. McDade's	Attorney, Bob	$ 217.75	$ 0.00	$ 217.75
☐	48729	06/29/2016	06/29/2016	01/13/2016	Earl Hawkins v. McDade's	Attorney, Bob	$ 399.75	$ 111.00	$ 288.75
☐	48735	09/29/2016	09/29/2016	07/10/2016	Tammy Horn VS Record Town	Attorney, Bob	$ 495.30	$ 0.00	$ 495.30
☐	48736	10/12/2016	10/12/2016	09/12/2016	Tammy Horn VS Record Town	Attorney, Bob	$ 810.55	$ 0.00	$ 810.55
☐	48737	10/25/2016	10/25/2016	10/25/2016	Tammy Horn VS Record Town	Attorney, Bob	$ 272.80	$ 100.00	$ 172.80
☐	48738	11/01/2016	06/30/2018	11/01/2016	Tammy Horn VS Record Town	Attorney, Bob	$ 500.30	$ 0.00	$ 500.30
☐	48748	03/23/2017	03/23/2017	03/23/2017	Cynthia Barber VS Body Fate	Attorney, Bob	$ 770.87	$ 294.00	$ 476.87

28 Invoices Listed   Selected Balance: $ 0.00

Date/Time	Entered By	Billing Notes
06/28/2018 3:47 PM	MASTER USER	Letter "Standard Billing Letter" sent to joann@bestlawfirm.com for the following invoices: 48720,48725,48735
06/20/2018 5:53 PM	MASTER USER	This is a billing note for client Best Law Firm.

Undo Changes   Save Changes   View Invoice   Print Statement   Send Letter   Notes 🔗

CREDIT LIMIT

If a **Credit Limit** is entered for the client or attorney and their outstanding invoices exceed this, the **Current Balance** will show in red. In addition, the assignment details window will show "OVER LIMIT" in red in the client or attorney box.

Assignment Details

Client		List All Add Edit
Name	Best Law Firm	
Address:	Tower II 2739 Broadway Suite 230	
	Denver, CO 80202	
	OVER LIMIT	

The order and invoice windows will now show the client and attorney balances. There will also be a **Credit Limits** button showing if you have at least view access to invoices.

Invoice # 48803

Bill To   **Invoice Remarks/Files**

Client	Best Law Firm
Attorney	Attorney, Bob
Phone:	303-123-9765 Emails To: bobattorney@standard.com
	Client Balance: $ 9,715.70 Attorney Balance: $ 8,355.15 Credit Limits

Address

Type	Billing
Address	Tower II

Hover over or click on **Credit Limits** to see the client and attorney credit limits.

INVOICES

A list of all outstanding invoices will display on the billing window. This list can be sorted by clicking on the column headers.

BILLING NOTES

A separate type of note was added specifically for billing notes and a summary of them will show at the bottom of the billing window. You can enter additional notes or see/enter other types of client/attorney notes by clicking on the **Notes** button.

SEND LETTER

You can send a letter to the client or attorney with information on their outstanding invoices by checking off the invoices in the invoice list then clicking on the **Send Letter** button. It will prompt you to send a "Client Billing" or "Attorney Billing" letter template you have set up for the current company and optionally include a PDF of the invoices. The letter templates are described below in this document. After a letter is emailed or printed, an internal billing note will be recorded for it.
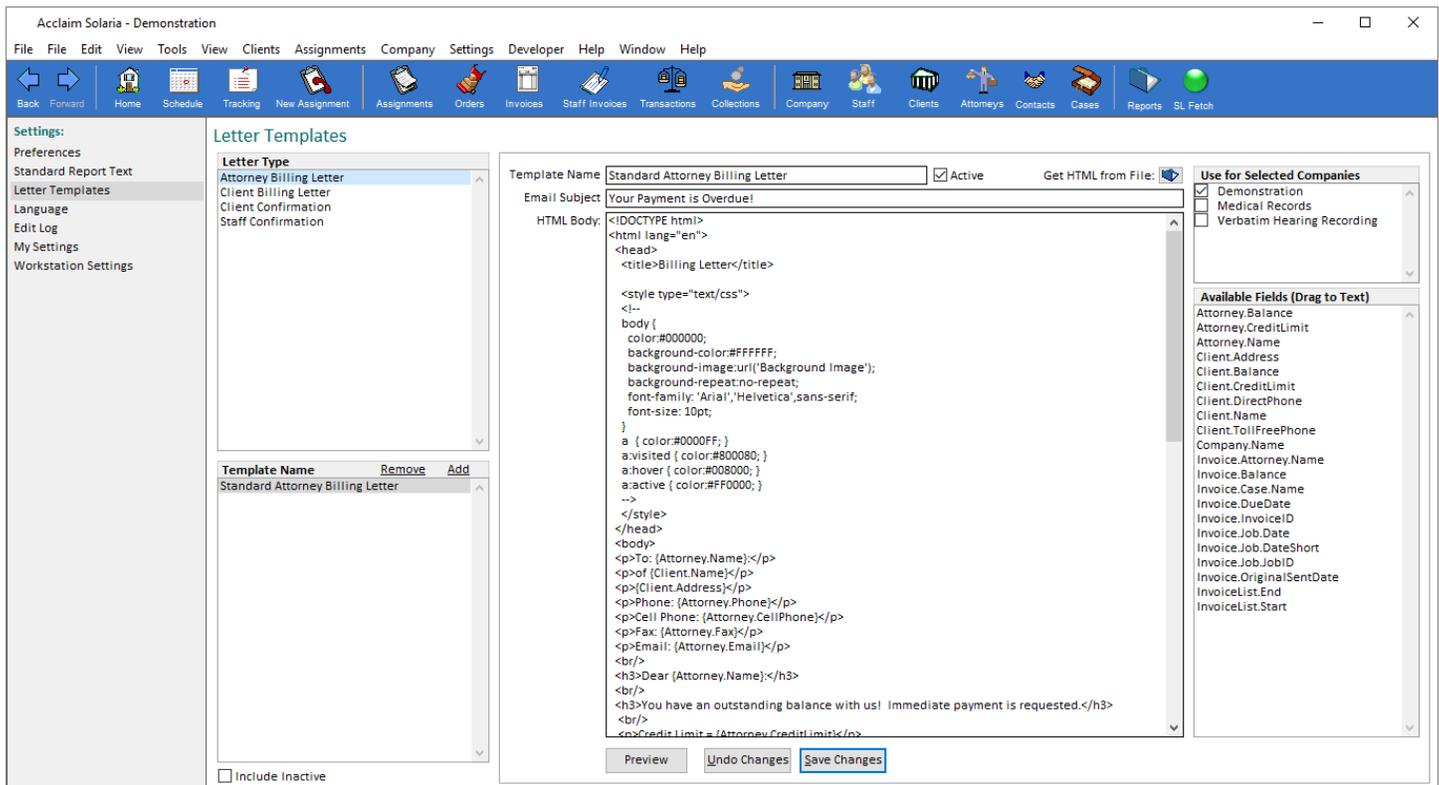
LETTER TEMPLATES

Custom email letters can now be set up in a new window added to Solaria called "Letter Templates". This is where custom client and staff confirmations will now be set up instead of under System Preferences. (System Preferences will still have the checkbox to check if you use the custom confirmations or not.) In addition to the confirmation letters, two new letter types were added for the client billing letter and the attorney billing letter. All letter templates use HTML for their content so you can format them as you would like. *[SD-986]*

A new menu called **Letter Templates** was added to the **Settings** menu to get to this window. A new user privilege of the same name was also added to User Access Groups to control who can view or edit these. By default, users will have the same privilege for **Letter Templates** as they do for the **Standard Report Text** privilege.
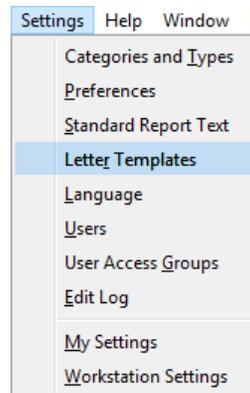
Clicking on the **Letter Templates** menu option opens the Letter Templates window.

Select a **Letter Type** in the top left list to see a list of templates set up for your Solaria in the list below it. (These will show names using your company language settings.) Select a **Template Name** from the list to view the letter template details.

Click **Add** to set up a new template. Enter the **Template Name**, **Email Subject**, **HTML Body**, its **Active** state and select the companies to use for it. You can drag fields from the **Available Fields** list to use them within the subject or body of the template.

Existing custom confirmations have been converted into letter templates. Any text that pulled from the **Standard Report Text** has been inserted in the subject and body for you and you will no longer need to update both. Custom confirmations will now be separate from the standard confirmations and always print if you have the preference turned on to use custom confirmations.

Client and attorney billing letters can show a list of invoices that were selected on the billing window. Use the **{InvoiceList.Start}** field at the beginning of a table row (for example) in the HTML body then use the **{InvoiceList.End}** field at the end of the table row. Use **{Invoice.XXX}** fields within the row for each column of data you want to display. Each row will be repeated for each invoice selected on the billing window. For example:

```
{InvoiceList.Start}
<tr>
<td>{Invoice.InvoiceID}</td>
<td>{Invoice.OriginalSentDate}</td>
<td>{Invoice.DueDate}</td>
<td>{Invoice.Job.JobID}</td>
<td>{Invoice.Job.DateShort}</td>
<td>{Invoice.Job.Case.Name}</td>
<td>{Invoice.Job.Attorney.Name}</td>
<td>{Invoice.Balance}</td>
</tr>
{InvoiceList.End}
```

A new **Job.DateShort** field was added to use in letters and Standard Report Text. It will print the assignment date as MM/DD/YYYY.
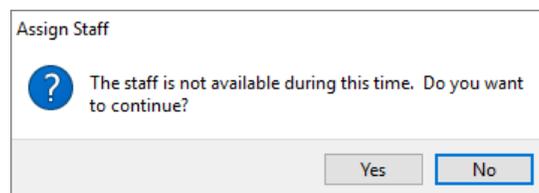
ASSIGNMENTS

- A new preference was added that when turned on, will warn you if you create a new assignment with no services selected. Turn this on under **Settings → Preferences → Assignments** tab. *[SD-977]*
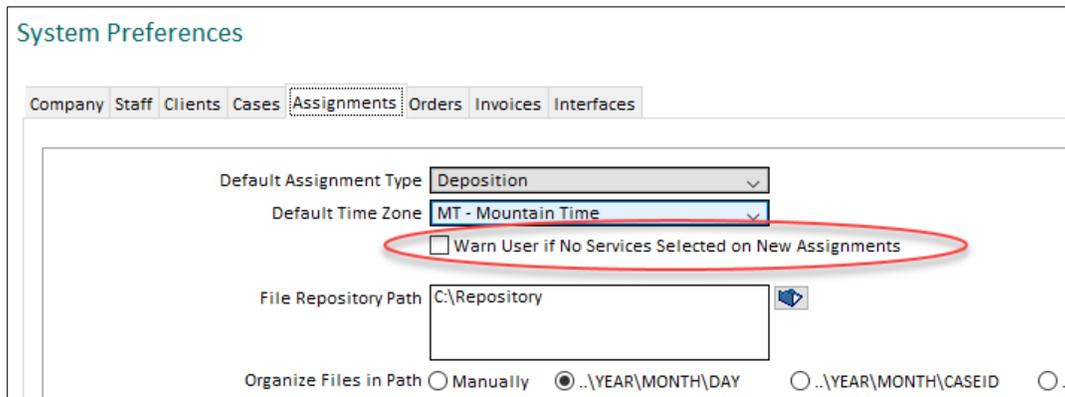
- The starting time for an assignment will now show next to the assignment date in the left panel while viewing an assignment-related window. *[SD-963]*
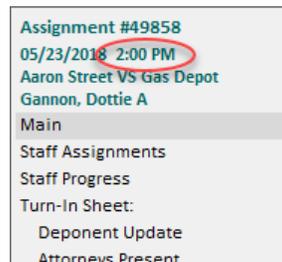
- Verbatim Hearing Recording companies can now enter multiple hearings for the same scheduled start time. *[SD-981]*
- When assigning staff to an assignment, it will now display a warning if the staff person is not available during the time scheduled for the assignment. *[SD-973]*

- In Deponent Update for Verbatim Hearing Recording companies, the canceled option was re-labeled to "Canceled Hearing (No show, postponed, notification after 2pm the day prior)". *[SD-941]*
- When attaching files to an assignment or directory item (such as cases), you can now enter a URL to a file on the Internet. Enter the URL, beginning with "http", in the **Enter URL to Link to** field on the "Select Files to Add" window. *[SD-964]*
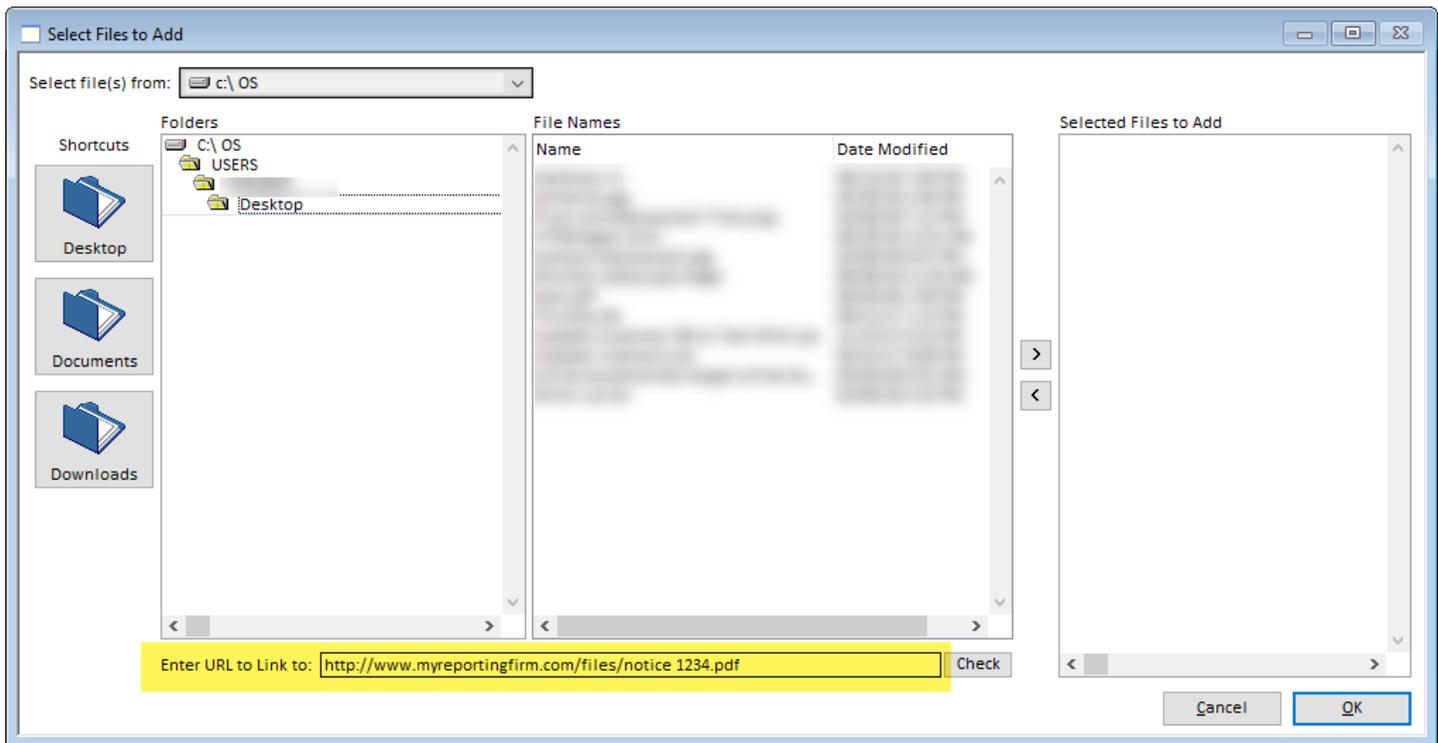
If you have more than one URL to link to, click on the ">" key to move each URL to the **Selected Files to Add** list. Later, when anyone opens the file from the assignment or directory item, it will open the browser to that URL. If you are integrating with ServiceLink, the file will open to the URL there as well.

- If the Solaria registration is set up as running in a cloud environment, you will no longer see other users' "C:\Users\[UserName]" folder when adding files to an assignment. *[SD-987]*

ORDERS

- A new order preference was added to System Preferences that allows you to mark all orders as shipped when you mark one order as shipped. Go to **Settings → Preferences → Orders** tab. *[SD-966]*
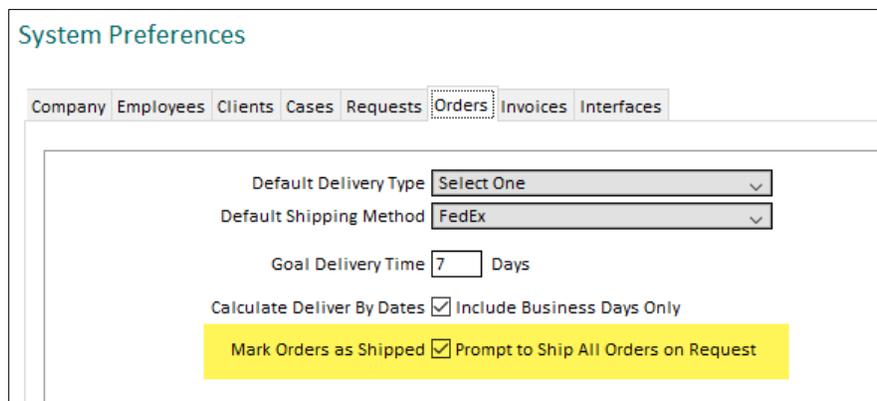
With this preference turned on, you will be prompted with the following when you enter the **Shipped On** date on an order and there are other orders that have not been shipped yet:
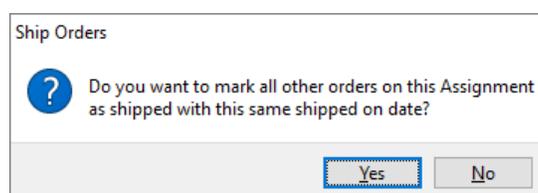
Selecting "Yes" will copy the **Shipped On** date to other orders that do not have one and update their statuses.

- You can now change the **Delivery Type** on shipped orders that have been invoiced, as long as there are no payments made on the invoice. When changing the **Delivery Type**, it will not update the **Delivery By** date if the order has been shipped. If there is an unpaid invoice attached to the order, you will be informed that the invoice rates will be updated. You will also be asked if you want to update the rates for any unpaid staff invoices that have the order on it or not. *[SD-974]*

STAFF INVOICES

- The top of the staff commissions invoice window was changed to look the same as the normal staff invoice window where it shows assignment information, invoice fields, services, etc. *[SD-969]*

Invoice #32290 for Budd, Keith M   Status: 2 Days Before Payment Due

Assignment Information
Assignment Date: 04/08/2016   Work Completed On: 04/21/2016
Start Time: 1:00 PM   MT   Billable Hours: 1.50 Hours

Case: Cynthia Barber VS Body Fate

Invoice Remarks/Files

Invoice Client/Location Services

Template Override [Per Staff Setup   ] ☐ Non-Guar: Pay If Client Paid
Print Type [Partial Details (No Qty)   ] ☑ Group by Deponent   ☐ Turn Off Auto Updates

- When a guaranteed pay type is used on a staff invoice, the **Non-Guar: Pay If Client Paid** checkbox will now be disabled because it only applies to non-guaranteed pay types. *[SD-1010]*

TRANSACTIONS

The transaction window to enter client receipts and staff payments has been redesigned to take into account several suggestions we have received. *[SD-948]*

New Receipt

Payment Information   ◉ Client   ○ Staff

Date [07/20/2018]   Amount [$ 0.00]   Payment Method [ACH   ▾]
Paid By [   ]

Memo [   ]   Payor [   ]

┌ Invoice Search ───────────────────────
Amount [$ 0.00] ☐ Find Amount Excluding Interest
Name Is   [   ]
Name Like [   ]
Invoice# [   ]
☑ Search Across Companies   [Search] [Clear]

Invoices Found

☐	Invoice#	Assignment#	Date	Client	Case	Billing Reference	Due Date	Interest	Balance

Selected: $ 0.00

[⬇ Pay Selected]   [⬆ Delete Selected]

Invoices to Pay

☐	Invoice#	Assignment#	Date	Client	Case	Billing Reference	Due Date	Interest	Balance	Payment	WO

Unapplied: $ 0.00

[Cancel] [OK]

[Split]

- The payment area has been separated from the search fields. Enter the information about the payment you received/person you are paying in the **Payment Information** section.
- The credit card number field is the only credit card field that will be required now. We encourage you to only enter the last four digits of the number.

- To search for invoices, enter the fields in the **Invoice Search** section. (Some fields will be automatically entered for you but they can be changed.)
  - You can now search on client names that are like the text you enter and find invoices for multiple clients.
  - You can search for invoices across companies to include them on the single payment. The payment itself will still be for the current company.
- A list of invoices that match your search criteria is shown separate from the list of invoices that you are paying.
  - Use the checkboxes to select invoices, then click on **Pay Selected** or **Delete Selected** to add/remove invoices to/from the bottom list of **Invoices to Pay**.
  - Checking an invoice will no longer set the amount to pay on it. The checkbox is only used to move invoices between lists.
  - All invoices in the bottom list will be paid; they do not need to be checked.
- When entering the amounts on client invoices to pay, the total **Amount** at the top of the window will not be changed. It will leave the amount you enter as is.
- Clicking on a line in either list will highlight the line you clicked on or are entering an amount on.
- When paying staff invoices when using the **Split Staff Pay by Product Type** preference, the balance shown for each product type of an invoice will now correctly show just the balance of that product type.
- When paying staff, you will now see their **Next Pay** amount on each invoice.
- When transactions are sent to ServiceLink, it will send any unsent invoices that were paid on it to ensure everything related to the transaction is in ServiceLink. However, if an assignment on any invoice of a transaction has not been sent to ServiceLink, an error message will display showing the assignment numbers that need to be sent first. *[SD-994]*

REPORTS

- The **Assignment Work Outstanding** and **Assignment Worksheet Outstanding** reports now have the option to run them by an assignment date cut-off date or a deliver by date cut-off date. (The exact report listed will depend upon your staff system preferences.) *[SD-975]*
- The **Assignments Scheduled** report now has the option to print the assignment notes with each assignment. Turning this option on will print all active notes for the assignment, whether they are internal or not. (Note that these will not be exported to a tab or Excel file report destination.) *[SD-976]*
- The **Assignments Scheduled** report was also modified to include the **Opposing Counsel** for each assignment (shown under the attorney name). *[SD-1001]*
- A new report called **Assignments Canceled** was added to the **Reports ▶ Assignments** section. It will prompt for a date range then list all assignments that were canceled during that date range. Totals and a percentage of all assignments will be printed at the bottom of the report. *[SD-996]*
- The **Income by Client by Assignment** report was modified to include a "Detailed" option. Using the detailed option will add the client's type, phone number and address as well as the attorney name, attorney email address, caller name and caller email address to the report. *[SD-942]*
- A new report called **MS Word Merge – Address Labels** was added to the **Reports ▶ Staff** section to print address labels for selected staff. It will use the files named STAFLBLS.TAB and STAFLBLS.DOC, which can be found in your Word Merge folder. *[SD967]*
- A new report called **Company Account Totals** was added to the **Reports ▶ Financial** section to list the debit and credit amounts per company account for a date range for each company you have selected. *[SD-1005]*
- When running statements from the Reports section and choosing the option to include **All Invoices and Payments**, the prompt to select the client/attorney/case/staff to run the statement for will now include people that only had receipts during that date range. *[SD-984]*
- The **ID** column was removed from the prompt to select names of who to send statements for when sending statements from the Reports section. This allows you to now type in the first letter of a name in the list to highlight it. *[SD-998]*

- The **Export to QuickBooks** options will now show the name of the date field that is used by the date range in the label above the date range fields. Staff invoice exports will now find invoices based upon the invoice sent date range instead of assignment date range. *[SD-1004]*

ISSUES RESOLVED

LIST WINDOWS

- When switching between a VHR company and a non-VHR company on the assignments list, it will now show the buttons and fields at the bottom of the window correctly. *[SD-951]*

- When opening an assignment, order or invoice for a company other than the current company, the warning displayed explaining that you are switching companies was fixed as it was missing a word in it. *[SD-991]*

- Exports to Excel, such as from list windows, will now export more than 999 rows to the Excel spreadsheet. *[SD-950]*

- When going to a list window, such as the invoice list, and the ServiceLink fetch had run before you went to the list window, it will no longer select the "Search Results" status option and show all records for the list. *[SD-970]*

- Searching for staff in a specific company will now work correctly on the staff list window when staff are shared across companies. *[SD-962]*

- The assignments list will now show conference room names in the **Location Address** column if the assignment is in a conference room that does not have an address entered for it. *[SD-960]*

- Searching on the balance of staff invoices in the Staff Invoices list window will no longer return a SQL error if your Solaria is set up to do split pay for staff. *[SD-1012]*

ASSIGNMENTS

- When adding new attorneys from the assignments window, it will no longer set their birthday to 01/01/2000. *[SD-992]*

- When rescheduling an assignment from the assignment details window and telling it to clear all confirmations, it will now clear the client confirmation status on the assignment. *[SD-947]*

- When using the {Job.TrackingItems} field on confirmations, it will now show the correct staff person assigned to each tracking item. *[SD-983]*

- The assignment delivery information will now only be updated if a user physically changes the delivery information on the Staff Progress window to something different than what it was. It will update the assignment with the fastest delivery information entered for any staff on the progress window (as is the current logic). *[SD-993]*

- When entering the deponents in the Deponent Update window and only entering the transcript page numbers, it will now properly display the information after saving instead of clearing out the fields. *[SD-961]*

- When loading the Attorneys Present window from the data that was entered on the ServiceLink worksheet, it will now properly set the **On Behalf Of Type** on the attorneys listed in the left-hand panel. *[SD-1008]*

- When saving an assignment request from ServiceLink as an assignment in Solaria, it will now put the correct upload date on the files that were saved on the request. *[SD-1009]*

INVOICES

- After adding an invoice charge to one invoice, then immediately adding an invoice charge to another invoice, it will no longer show the amount from the first invoice charge when adding the second one. *[SD-999]*

- The **Recalc** button on staff invoices will now correctly calculate the total paid on **Other Pay** and **Expense** items and therefore calculate the totals correctly. *[SD-971]*

- Printed client invoices will now show "PAST DUE" on them correctly when they are overdue and the preference to print this is turned on. *[SD-958]*

- Invoices will now print long case names on them without overlapping text. *[SD-997]*

REPORTS

- Statements will now include or exclude invoices correctly when they had a balance written off on them and therefore marked paid on the same date as the ending date of the statement. *[SD-949]*