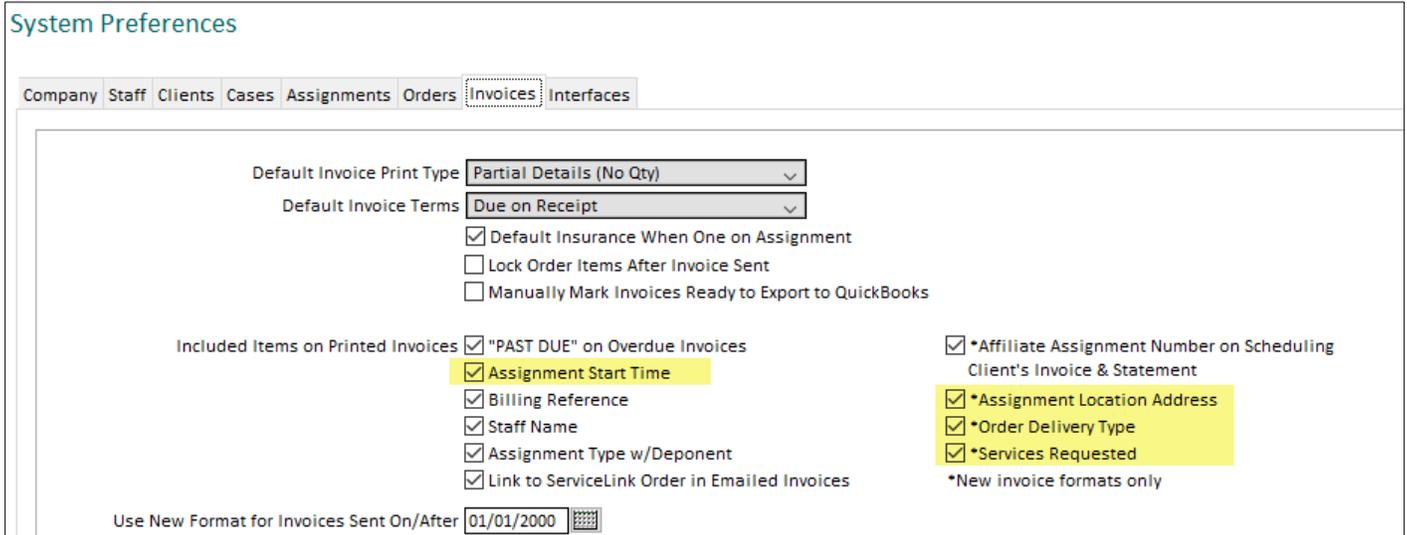


5.70 Release

ENHANCEMENTS

SYSTEM PREFERENCES

- New default credit limits were added to system preferences for clients and attorneys. These can be found by going to **Settings → Preferences → Clients** tab. After entering the defaults, all new clients and attorneys that are inserted throughout Solaria will use these default credit limits. [SD-1038]
- New preferences were added in **Settings → Preferences → Invoices** tab to print additional items on client invoices. These will be turned off by default. This section was also rearranged to show items that can only be printed on the new invoice format in the right column of optional fields. [SD-1035]
 - **Assignment Start Time** (prints after the assignment date in the subheader on the invoice)
 - **Assignment Location Address** (prints in the left column of assignment information)
 - **Order Delivery Type** (prints in the right column of assignment information)
 - **Services Requested** (prints in the right column of assignment information)



The screenshot shows the 'System Preferences' window with the 'Invoices' tab selected. The 'Default Invoice Print Type' is set to 'Partial Details (No Qty)' and 'Default Invoice Terms' is 'Due on Receipt'. There are three checkboxes: 'Default Insurance When One on Assignment' (checked), 'Lock Order Items After Invoice Sent' (unchecked), and 'Manually Mark Invoices Ready to Export to QuickBooks' (unchecked). Under 'Included Items on Printed Invoices', there are two columns of checkboxes. The left column includes 'PAST DUE' on Overdue Invoices (checked), 'Assignment Start Time' (checked and highlighted), 'Billing Reference' (checked), 'Staff Name' (checked), 'Assignment Type w/Deponent' (checked), and 'Link to ServiceLink Order in Emailed Invoices' (checked). The right column includes '*Affiliate Assignment Number on Scheduling Client's Invoice & Statement' (checked), '*Assignment Location Address' (checked and highlighted), '*Order Delivery Type' (checked and highlighted), and '*Services Requested' (checked and highlighted). A note below the right column says '*New invoice formats only'. At the bottom, 'Use New Format for Invoices Sent On/After' is set to '01/01/2000'.

- When integrating with ServiceLink, a new system preference was added to the **Settings → Preferences → Interfaces** tab called **Send New User Credentials Only From Assignments**. Turning this on will suppress the prompt on maintenance windows to send users their credentials. These will still be sent to new users automatically if the information on any window related to an assignment is sent to ServiceLink and the notification is turned on in ServiceLink. [SD-1025]

DIRECTORY DATA

- The directory data maintenance windows were modified when integrating with ServiceLink. They will now only send to ServiceLink upon saving if items that are used by ServiceLink are changed. All other changes will not send to ServiceLink after the window is saved. [SD-1026]
- **Client Type** was added as a column that can be viewed in the Client list window. Click on the cog icon in the top right corner of the list to add this field to your list. [SD-1029]

ASSIGNMENTS

- You can now copy the text of the attorney email address, caller email address, case docket number and client case number fields showing on the assignment details window. [SD-1028]

- When confirmations are sent for rescheduled assignments, they will now show "Rescheduled to [NewJobDate]" instead of just "Rescheduled" to alleviate confusion regarding the current date of the assignment. This was changed on the built-in confirmations only. A new field called **Job.RescheduledToCanceled** was added to include the date in custom confirmations. The existing **Job.RescheduledCanceled** field will still just show "Rescheduled". [SD-1044]

INVOICE LIST

- A new optional column named **C.O.D.** was added to the client invoice list. Click on the cog icon in the top right corner of the list to add this column to the list. It will show "Y" if either the billing client or attorney on the invoice is marked C.O.D. [SD-1046]

COLLECTIONS

- An **Include Completed** checkbox was added to the bottom of the Collections window and is shown when you are viewing "All Statuses" or search results. It will be turned off by default so that it will not show any completed collections in the list. Turn this on to include completed collections in the list. [SD-1018]
- When editing a single collection and it has no balance but is not completed yet, you will see a new checkbox called **Set to Completed** to mark the collection as completed. [SD-1019]

- When editing a single collection and it has been completed, you will see a new checkbox called **Remove Completed Date** to remove the completed date from the collection so other invoices can be added to it. [SD-1020]

REPORTS

- A new report called **Assignment Production Tracking Details** was added to the **Assignments** section of reports. It lists all assignments with selected tracking items that were completed within a date range. It includes the date and person who completed the orders on each assignment. [SD-1045]
- On the **Assignments Scheduled** report, the assigned staff will now show their email address next to their name instead of their fax number. [SD-1022]
- The **Email Invoices in Batch** report option for **Attorneys/Contacts** now includes a date range to filter invoices based upon the invoice sent date or invoice due date. [SD-1040]
- The **Staff Payables** report now has the option to separate the report by staff so you can print to your destination and it will create a separate report for each staff person. For example, print to Email and it will create a separate email message for each staff with their own report attached as a PDF. The report options to select from were moved around slightly to add the new **Separate Report Per Staff** checkbox to use for this feature. If you check **Separate Report Per Staff**, you check **Send Emails Immediate (No Preview)** if you are sending to the Email destination and you do not want to preview each email before sending them. [SD-1011]

New options were added to the Standard Report Text window to set the **Email Subject** and **Top of Email** text for the Payables report.

Payables Report

Email Subject	Payables Report
Top of Email	Attached is a copy of your payables report for the current payroll period. Thank you for your services!

- After running the **Payables** report and selecting the option to pay the staff invoices, you can now enter the date of the payment that you want to use on the transactions. [SD-1017]

- An option to **Send Emails Immediately (No Preview)** was added for the following reports that are run from the Reports module. This bypasses the email preview window and sends the emails immediately. When using Outlook, you will still see the emails in the "Sent Items" folder. [SD-1039]
 - Clients: Email Notifications
 - Attorney/Contacts: Email Invoices in Batch (existing option to preview emails first was reversed)
 - Staff: Email Notifications
 - Staff: Payables (when sending to each staff separately)
 - All Statements
- The **Staff → Product Sales** report will now allow you to select the date to use for the data it searches on: either the staff invoice sent date or the paid date for the staff invoice items. Using the sent date, it will find staff invoices that were sent in the date range and then all client invoices for the products paid to staff on those invoices. Using the paid date will find the staff invoice items that were paid during the date range

(not when the entire staff invoice was paid) and then all client invoices for the products paid to staff on those invoice items. [SD-1042]

- The **Financial → Client Invoice Profit** report now has the option to filter the invoices based upon their assignment rate type. [SD-1041]

ISSUES RESOLVED

- The Invoice Print Types window will no longer return a SQL error when you add a new line with just a description entered in it and click **Save Changes**. [SD-1013]
- The "Invoice.Case.Name" field code will now work correctly for client and attorney billing letter templates. [SD-1015]
- After editing a letter template and saving, switching to another letter template of the same letter type, then switching back to the first letter template, it will now correctly show the changes that were previously made on it. [SD-1027]
- Switching between the **Due** and **Sent** radio buttons at the top of the client and staff invoice list windows will now reload the list properly after clicking on **Go**. [SD-1047]
- An issue was resolved where Solaria was adding blank staff invoices when a back order/late order was added after staff invoices were paid. [SD-1031]
- After voiding a client invoice that is in collections, it will properly complete the collection if it was the last invoice with a balance in that collection. [SD-1016]
- When integrating with ServiceLink, voided staff invoices can now be sent to ServiceLink from the staff invoice list window. [SD-1032]
- When using the write-off option on the transaction window to write off invoice balances, it was not entering a charge date on the invoice charges. The upgrade will enter the date for any invoice charges that are missing the date. [SD-1048]
- When integrating with ServiceLink, voiding transactions from the Transactions list window will now send the affected invoices to ServiceLink so they reflect the voided payments. [SD-1033]
- When integrating with ServiceLink and payments on invoices are retrieved from ServiceLink, it will now properly update the status on related assignments. [SD-1030]
- The **Orders/Products → Invoice Charges** detailed report will now show the invoice numbers properly. [SD-1049]
- The **Orders/Products → Product Sales** report export to a tab or Excel file will now include the "Profits" column. The "Paid Out" column will have the correct heading name in the export file as well. [SD-1036]

ISSUES RESOLVED IN 5.70.013

- The Court Name and Claim Number for cases entered on new assignment requests from ServiceLink will now show in the split view of assignment details. [SD-1051]
- The Client Invoice# will now show correctly on the Staff Payables report when the preference is turned on to include it on the report. [SD-1057]
- When the taking attorney is entered on an assignment and they work for a different client than what is entered on the assignment, the Attorneys Present window will no longer create a duplicate attorney which was causing issues. [SD-1058]

ISSUES RESOLVED IN 5.70.014

- When creating orders and there is more than one staff on the assignment that get paid, it will now correctly update all staff invoices for orders created after the first order and for orders edited later. It will also no longer return any SQL errors. [SD-1062]