

Acclaim Solaria 5.80 Release Notes



5.80 Release

ENHANCEMENTS

NOTIFICATIONS

The ability for contacts to be copied on emails sent to attorneys can now be set per relationship between a contact and attorney instead of for a contact as a whole. This allows a contact to be copied on some attorneys and not others. [SD-1021]

When integrating with ServiceLink, the notification setting on the relationship will be in synch with the notification setting on the relationship in ServiceLink so that each application has the same contacts copied on the same attorney emails.

Note that contacts currently copied on attorney emails in Solaria will now also be copied on attorney emails in ServiceLink. Also note that Solaria does NOT maintain notifications for relationships between two attorneys or between two contacts. It ONLY maintains notifications for attorney-to-contact relationships.

Each attorney can set whether they want any contacts to be copied on their emails or not. You will see new options when adding or editing attorneys in Solaria.

Notifications for Attorney Go To:

Only the Attorney The Attorney and Selected Contacts Only Selected Contacts

If the attorney has **The Attorney and Selected Contacts** or **Only Selected Contacts** selected, you will see an option to copy the contact on the attorney's notifications when you are editing a contact for an attorney.

Edit Contact

Contact Type:

First: Middle: Last:

Full Name: Etl, Terry

Email:

Phone:

Mobile: Birthday:

Pager: Effective:

Fax: Expires:

Notifications Copy Contact on All Emails to the Attorney

You will also see a Notifications checkbox on the list of contacts for an attorney (or list of attorneys for a contact).

Contacts			Select	Remove	Add	Edit
Name	Type	Phone	Notifications			
Clay, Kenneth D	Paralegal	509-465-4581	<input checked="" type="checkbox"/>			

You can set the default for new attorneys created in System Preferences.

System Preferences

Company Staff **Clients** Cases Assignments Orders Invoices Interfaces

Defaults for New Clients Charge Interest on Late Payments
 Send Mailings
 Credit Limit

Defaults for New Attorneys Notifications for Attorney Go To: Only the Attorney The Attorney and Selected Contacts Only Selected Contacts

Invoice/Statement Preferred Desitnations Email to Their Email Address by Default
 Credit Limit

DELEGATIONS

If you are integrating with Servicelink, you will now have the ability to manage delegations from within Solaria for attorney-to-contact relationships. All current delegations between attorneys and their contacts in Servicelink, along with their notification settings, will be brought into Solaria when the first automatic fetch or full manual fetch is done. It will also send to Servicelink all contact notification settings that are in Solaria but not in Servicelink so that the two applications are in synch. [SD-1021]

Note that Solaria does NOT maintain delegations for relationships between two attorneys or between two contacts. It ONLY maintains delegations for attorney-to-contact relationships.

Each contact that is a delegate of an attorney will be listed for the attorney with a **Delegate** checkbox checked.

Contacts				Select Remove Add Edit		
Name	Type	Phone	Notifications	Delegate	First Date	Last Date
Virtual, Joani	Paralegal		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/01/2018	

When editing the contact relationship, you can edit the delegation information.

Edit Contact

Contact Type:

First: Middle: Last:

Full Name: Virtual, Joani

Email:

Phone:

Mobile:

Pager:

Fax:

Birthdate:

Effective:

Expires:

Notifications Copy Contact on All Emails to the Attorney

Delegation Contact is a Delegate of Attorney in Servicelink

Status:

First Assignment Date:

Last Assignment Date:

Cancel OK

Turn on the delegation to allow the contact to view assignments, files, orders and invoices for the attorney in Servicelink.

If a contact is showing a red "D" next to the **Delegate** checkbox in the **Contacts** list, this indicates that the contact had requested access to the attorney's information in Servicelink but that the attorney denied it. You can overwrite this status in the Edit Contact window.

Contacts							Select	Remove	Add	Edit
Name	Type	Phone	Notifications	Delegate	First Date	Last Date				
Runner, Renee	Legal Assistant	9702325300	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/30/2018					

If you want to allow ALL contacts and attorneys within a client to see each other's assignments, files, orders and invoices, check **Delegate Access to All Attorneys and Contacts in ServiceLink** for a client.

State Farm

Client Name:

Client Type: Website:

Warning:

Phone Numbers

Direct:

Toll-Free:

Fax:

Client Defaults

Invoice? Invoice C.O.D.

Invoice Print Type:

Invoice Terms:

Order Template:

General | Invoice Remarks | Collections | Commissions | Files | Client Case# | Miscellaneous

Type/Effective	Address	Remove	Add	Edit
Office 04/10/2016 -	603 Atwood Ct Fort Collins, CO 80525			

Delegate Access to All Attorneys and Contacts in ServiceLink

Contacts							Select	Remove	Add	Edit
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All "quick-entry" windows allowing you to add or edit clients, attorneys or contacts as you work on maintenance or assignment-related windows will show these new settings.

MY SETTINGS

- A new option was added to **Settings ► My Settings** called **Suppress Prompts When Switching Companies** so that you are no longer prompted when you open an assignment, order, invoice, etc. and it will be switching companies. [SD-1055]
- A new user setting was added to **Settings ► My Settings** called **Suppress Message After Sending to ServiceLink**. Checking this will suppress the confirmation message after a successful send of information to ServiceLink and will only display messages if there were errors or if you were sending a batch of records to ServiceLink. [SD-1056]

WORKSTATION SETTINGS

- The edit log will now record when a user changes their workstation setting for syncing to ServiceLink, such as when they turn off automatic syncing. [SD-1090]

CATEGORIES AND TYPES

- If you are integrating with ServiceLink, any tax rates you have set up will now sync to ServiceLink upon the upgrade and whenever they are edited. It will also show the tax rate on client invoices in ServiceLink. [SD-1068]
- File Types now have a checkbox called **Show w/Invoice Remarks** that will by default be unchecked. Check this for file types of files attached to clients, attorneys, cases and staff that you want displayed in the Invoice Remarks/Files pop-up window when viewing assignment windows. All other files with a file type that has this unchecked will be hidden from this pop-up window. [SD-1086]

Set Up File Types

Description	Remove	Add	Associated Application	Auto Access to Staff	Auto Access to All Attorneys on Assignment	Attach to Staff Confirmations	Attach to Client Confirmations	Show w/ Invoice Remarks	Active
ASCI			Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Audio File			Audio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Correction Sheet			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ETranscript			ETranscript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
For Scheduling Attorneys			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Notice			PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Order Form			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Picture			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- The system contact type of "Internal Reference" will now display as "Saved Attorney" (using your language for the term "Attorney") throughout Solaria to make it more clear who these contacts are. These are contacts that are attorneys and were used as the caller on an assignment so are treated as the same person. [SD-1063]

COMPANY MAINTENANCE

- On the Company Maintenance window, when **Print Logo on Left of Mailable Reports** is selected, the recommended size of 1" x 6.5" for the logo file for this option will now display. [SD-1073]

CASE MAINTENANCE

- On the Case Maintenance window, the client name will now show next to each attorney name listed on the window and also when you click on the **Select** button to select an existing attorney. [SD-1075]
- The **Clients** tab was renamed to **Client Case#** to avoid confusion. It lists the client case numbers for clients associated with that case. [SD-1081]

CLIENT MAINTENANCE

- The **Cases** tab was renamed to **Client Case#** to avoid confusion. It lists the client case numbers for cases associated with that client. [SD-1081]

CONTACT MAINTENANCE

- A new checkbox called **Include Contacts that are Saved Attorneys** was added to the bottom of the contact list window. Leaving this unchecked will exclude all contacts that are also attorneys in the database (as a result of being the caller on an assignment). [SD-1085]

SCHEDULE

- You can now assign colors to assignment statuses and view the assignments on the schedule with these colors. Go to **Settings ► Categories and Types ► Assignment Statuses** to select colors for each status. (Note you may call assignments by a different name.) [SD-1065]

Set Up Assignment Statuses

Description	Remove	Add	Highlight Color	Active
1-Requested				<input checked="" type="checkbox"/>
2-Assigned				<input checked="" type="checkbox"/>
3-Confirmed				<input checked="" type="checkbox"/>
4-Reporter In Progress				<input checked="" type="checkbox"/>

The schedule checkbox to show color coding was replaced with a drop-down list to show no color coding, assignment color coding or assignment status color coding.

<input checked="" type="checkbox"/> Include Cancellations	<input type="checkbox"/> Include Other Items
<input checked="" type="checkbox"/> Include Assignments	Assignment Status Color Coding ▾

TRACKING BOARD

- The worksheet items on the tracking board will now show a calculated due date if the check out information does not have a worksheet due date or if check out was not done. (Note turning on the

checkbox to include items with no due date will no longer affect this as every worksheet will show a due date now.) [SD-1096]

- Everything showing on the tracking board will now show the job delivery type and date if the check out information does not have this or if check out was not done. [SD-1097]

ASSIGNMENTS

- When entering a new assignment from a ServiceLink assignment request, the requested information will now be filled in for you when you click on the **Add** button in the different sections. Note that when there are multiple deponents, select one on the split screen before clicking on **Add** in the deponent section. [SD-1060]
- The **Invoice Remarks/Files** link buttons on various assignment windows and the manager schedule were replaced with a red icon in the top area of each window. One icon will show when there are client, attorney, case and/or staff invoice remarks and/or file attachments on any of these windows. Clicking on the button will display the invoice remarks and files associated with all of these entities. [SD-1069]

- The window shown for the **List Salesperson** button on the Assignment Details window was redesigned to allow you to add, edit and remove salespeople directly on an assignment. This window works similarly to the **Commissions** tab on the Staff Maintenance window, however, it will fill in the names for you based upon the data on the assignment. Note that all changes for the assignment must be saved before you can click on the **List Salesperson** button. The new window will save any changes to the salesperson immediately to the database before it returns to the Assignment Details window. [SD-1066]

Staff	Commissions For	Name	Template	Start Date	End Date	Commissions On
Budd, Keith M	Attorney	Mouse, Jack	65/35	01/01/2016		Requesting Person's Invoices

ASSIGNMENT FILES

- Files with apostrophes or single quotes can now be uploaded to assignments and directory data in Solaria. [SD-1094]

STAFF ASSIGNMENTS

- When searching for staff to assign to an assignment, you can now show the staff person's city from their address on the list of available staff for a service. Select **Using Search** in the drop-down list above the list of available staff. In the search window, check **Show Staff City**. [SD-1064]

Search Assignable Staff

Search For

Name Like

Company

Department

City Like

State/Province

Postal Code +/-

Service Area

Show Staff City

The staff person's city will display as a column next to the **Rating** column. This column can be sorted by clicking on the column heading.

Possible Staff to Assign to Selected Service: Show

Name	Rating	City	7	AM	8	9	10	11	12	P
Erby, Jeffrey M	*****	Encinitas								
Sheard, Shawna J	****	Los Angeles								
Schwartz, Diane D		Los Angeles								
Kawamura, Kevin M		Oakland								
Dawson, Diane K		San Diego								
Diorio, Edward T		Whittier								

DEPONENT UPDATE

- When the Deponent Update is entered before any staff have checked in or out on an assignment, it will now only check in & out automatically if there is exactly one staff assigned that tracks progress. It will no longer create the check in/out for an "Unassigned" provider when more than one staff assigned to the assignment track progress. [SD-1099]

ORDERS/INVOICES

- Additional fields have been made optional in the title area of printed client invoices: **Case, Client Case#** and **Shipped On Date and Method**. Go to **Settings ► Preferences ► Invoices** to see these options. [SD-1053]

Included Items on Printed Invoices

- "PAST DUE" on Overdue Invoices
- Assignment Start Time
- Case
- Billing Reference
- Shipped On Date and Method
- Staff Name
- Assignment Type w/Deponent
- Link to ServiceLink Order in Emailed Invoices

- *Affiliate Assignment Number on Scheduling Client's Invoice & Statement
- *Client Case#
- *Assignment Location Address
- *Order Delivery Type
- *Services Requested
- *New invoice format only

- When entering the client invoice deponent subheading text, it will now scroll to allow you to enter up to 150 characters. It will also wrap this text on the printed invoice if needed. [SD-1054]
- When saving client orders and invoices, it creates/updates staff invoices for those staff that get paid on any products that were ordered. If any staff do not have a pay template to use for their staff invoice, it shows a message informing you to set up the staff or company pay templates. This message will now only show if the staff do not have a pay template AND it creates a staff invoice for them with items on it that they get paid for. It will no longer show the message if no staff invoice gets created for a staff person. [SD-1095]

REPORTS

- New options were added to the “Accounts Payable” report to include all invoices, normal invoices only or commission invoices only. When using the “Accrual” accounting method in invoice preferences, you will also have the option to include invoices with no due dates. [SD-1072]

The “Accounts Receivable” report now also includes the option to include invoices with no due dates when using the “Accrual” accounting method.

A new company account for “Accounts Payable Commissions” was added in **Settings → Categories and Types → Company Accounts**. The “Company Account Totals” report will split the normal staff invoice amounts from the commission staff invoice amounts. Note that the exports to QuickBooks will not use this new account and will continue to include all staff invoices in the main “Accounts Payable” account.

A “Difference” column was also added to the “Company Account Totals” report to show the difference between the “Debit” and “Credit” columns.

These three reports were updated to ensure correct data is being reported and that they tie together using the same date ranges.

- The Client Invoice Profit report will now print the client type and allow you to select more than one client to report on. [SD-1052]

EDIT LOG

- A filter on “Contacts” was added to the Edit Log so you can find changes that occurred with a specific contact. [SD-1061]

SERVICELINK FETCH

- A **Run Now** button was added to the ServiceLink Fetch window that is shown when you click on the **SL Fetch** icon on the toolbar. (Note this does not affect the timer so it will run again when it normally should.) [SD-1098]

ISSUES RESOLVED

- When using split staff pay and integrating with ServiceLink, if part of the invoice was paid it was showing that the invoice was paid in ServiceLink. This has been fixed to show a paid date only after all three buckets are paid. [SD-1083]
- The "Conference Room Usage" report will now show correct totals for the total time in each room and for the grand total at the bottom of the report. [SD-1084]
- When using room, meal and reporter counts on assignments, the schedule will now correctly add the reporters that have a full day of time off on each day of the schedule that has assignments. It will now exclude reporters that have time off for the date range but are not off every day during that date range. For example, if a reporter only has Fridays off, it will not add to the reporter count on other days of the week for that reporter. [SD-1091]

Patch 5.80.014

ISSUES RESOLVED

- After setting the confirmation status for a staff person on an assignment but leaving it unconfirmed, it will no longer clear out the status after it sends the confirmation information to ServiceLink. [SD-1102]
- Invoices and statements sent to attorneys with the **Use Client Preference** preferred destination will now send to the correct client preferred email address instead of the attorney's email address. [SD-1107]
- The tracking board will now properly sort on the **Deliver By** and **Worksheet Complete On** columns. In addition, the default width of the **Worksheet Completed On** column will be wider to show the entire column name. [SD-1106]
- When integrating with ServiceLink and reporters have entered expenses on their worksheets, it will now properly create the staff invoices in Solaria for the expenses. [SD-1101]