

## 6.11.001 Update Release

### ENHANCEMENTS

- The Special Instructions field on assignments has been lengthened to allow up to 4000 characters in it now. [SD-1360]

### ISSUES RESOLVED

- The Company Account totals report will now correctly add invoice charges created during the report date range to the Accounts Receivable Debit and Sales Income Credit columns. (Note: When adding negative invoice charges, it will reduce the A/R and when adding positive invoice charges, it will increase the A/R.) [SD-1359]
- The Collections Accounts Receivable report will now correctly subtract out invoice charges created after the report cutoff date to the invoice amounts shown. [SD-1359]

## 6.10.019 Update Release

### ISSUES RESOLVED

- When adding a new attorney and client from the "<--Add" button on the ServiceLink split window of the Attorneys Present window, the address for the client will now be saved without a SQL error. Also when entering an address for a deponent, it can now be saved without a SQL error. [SD-1349]
- Using the Back button to return to a staff invoice was sometimes showing a client order or invoice instead of the staff invoice. This has been resolved. (This happened when saving a client order or invoice, going to a staff invoice, going somewhere else then clicking Back.) [SD-1211]

## 6.10.018 Update Release

### ENHANCEMENTS

- The Assignments Received report will now print the client's address and the contact for each assignment. [SD-1344]
- The Assignments Scheduled report will now print the client's address for each assignment. [SD-1344]

### ISSUES RESOLVED

- When using split staff pay and using the transactions window to pay a staff invoice, it was not showing the line items for "originals" in the "Split" window if the originals are non-guaranteed and paid when the client pays but the client had not paid anything yet. This has been resolved. [SD-1342]
- When using split pay and paying a staff invoices with a negative amount left to pay in one of the buckets, the payment window will now automatically move the negative line to the bottom list to pay in full. [SD-1347]
- When paying a staff invoice that is non-guaranteed paid when client pays, any negative items that were paid by clients will no longer show an amount to pay of \$0.00 in the Split window for the payment. [SD-1343]
- The Staff Commissions report will no longer include items that have \$0.00 commissions to the staff on it. [SD-1341]

- When client invoices are paid, any “free” items on the invoice will also be marked as paid. This will release payment of those items to the staff that may get paid an amount on the items and are paid when the client pays. [SD-1337]
- When printing statements from Reports to the “Printer” destination and “Include Invoices” is selected, it will now print the invoices after printing the statements. [SD-1338]

## 6.10.016 Release

### ENHANCEMENTS

#### LOCATING STAFF BY DISTANCE TO ASSIGNMENT

A new feature has been added to allow you to find staff within a certain distance of an assignment location based upon their address. This is an add-on feature that you can subscribe to for \$20 per month per 1,000 requests (address look-ups). Prices are subject to change in the future. Please contact [support@acclaimlegal.com](mailto:support@acclaimlegal.com) to sign up for this add-on feature. [SD-1043]

An option was added to the **Interfaces** tab of System Preferences to turn this feature on.

### System Preferences

Company Staff Clients Cases Assignments Orders Invoices Interfaces

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**LEDES**  Integrate with LEDES 2000

Integrate with LEDES 98B

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**Accounting Software**  Track GL Codes for Products and Charges

Export to QuickBooks  Export to Sage

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**Logo and ICS File Server**

Website:

FTP Site:

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**Geography**  Find Staff by Distance to Assignment Location (Add-On Fee)

# Requests/Month Allowed: 1000      # Requests This Month: 31

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**Online Repository Integration**  No Integration  DepoManage

With this feature turned on, you’ll see the number of requests you are allowed per month (your “request cap”) and the number of requests you’ve done in the current month. Your request count starts over at the beginning of each month when the first request of the month is done.

After initially turning on this feature, Solaria will retrieve the geographic information for all addresses for all staff that are assigned to at least one service. (This does not count towards your request cap.) After this, Solaria will retrieve the geographic information for all changed staff addresses or new addresses added. (This will count towards your request cap.)

When assigning staff to assignments, select the **Use Search** option and enter the **Distance** in miles to find staff who are located near the assignment location. In addition, select **Show Miles Away** to show a column in the results list of the distance in miles each staff person is from the assignment location. This column can be sorted.

**Note: The distance between the assignment location and staff person’s address is a straight line, or “as the crow flies”. It is NOT the driving distance between the two addresses.**

**Search Assignable Staff**

Search For

Name Like

Company

Department

City Like

State/Province

Postal Code  +/-

Service Area

Distance  Miles From Assignment Location

Default View  Show City  Show Miles Away

This example will show the staff that have active addresses within 50 miles of the assignment location. If they have multiple addresses, their closest address will be used.

Possible Staff to Assign to Selected Service: Show

Name	Rating	Miles Away	7	8	9	10	11	12	1
Erby, Jeffrey M (1428/29 pages due)	*****	0							
Blackwood, Jan (0/2 pages due)		8							
Bender, Jose P (0/1 pages due)	****	10							

A report called **Staff Distance Traveled** will show in the **Staff** reports section with this feature turned on. It prints the distance traveled in miles by staff for each assignment within a date range. It includes total miles plus average miles per assignment per staff.

If you'd like to show kilometers instead of miles, select the **Settings ► Preferences** menu and switch the **Measurements** option from **Imperial** to **Metric**.

Save Names as "First Middle Last Suffix"

Emails Using MS Outlook  Use Read Receipts on Emails Sent from Acclaim Solaria

Currency Format

Date Format  Month/Day/Year  Day/Month/Year

Time Format  12 Hour  24 Hour

First Day of the Week

Measurements  Imperial  Metric

## STAFF BUSINESS NAMES

You can now enter the **Business Name** for any staff that have a "d/b/a" business name. [SD-1262]

**Erby, Jeffrey M**

First Name  Middle  Last  Suffix  Initials  Staff#

Business Name  Email  Hired On

General

Phone Numbers  Other Information

Department  Cert Abbrev

This business name will be printed on the staff invoices, statements and payables report in addition to their full name. The business name field was also added to the export file when printing MS Word Merge address labels for staff.

A new column was added to the Staff list and Staff Invoice list windows to show the business name. Click on the cogwheel icon in the top, right corner of the list to show this column in each list. In addition, use the Search window to search on a business name.

## SCHEDULE

- The Manager view of the schedule will now show progress in the **Staff Assigned** column for services on assignments. If no services have been assigned, it will be blank. If all services have been assigned, it will show a green checkmark. If only part of the services have been assigned, it will show a count of services assigned out of the total number of services. [SD-1303]

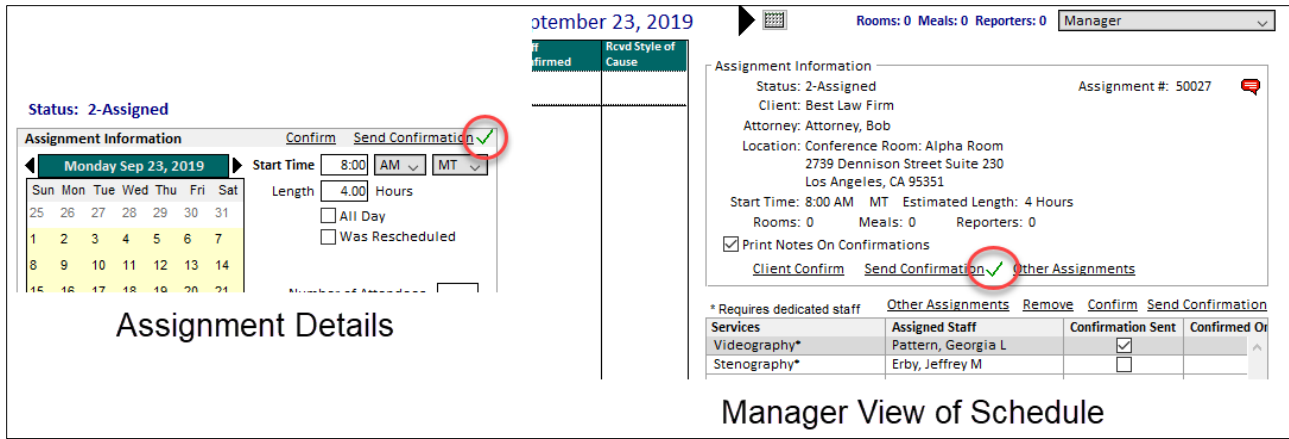
Demonstration		September 24, 2019		
Tuesday, September 24, 2019	Client Confirmed	Staff Assigned	Staff Confirmed	Rcvd Style of Cause
8:00-12:00 (JME) Best Law Firm		1 of 2	1 of 2	

## ASSIGNMENTS

- A new column was added to the Assignments list window to show the **# of Attendees** field from an assignment. Click on the cogwheel icon in the top, right corner of the list to show this column. [SD-1276]
- A **Confirmation Sent** column was added to the services list on the Staff Assignments window. This shows a checkbox if the confirmation has been sent to the staff assigned to each service. This will also be shown on the Manager view of the schedule. [SD-1295]

Staff Assignments					
<b>Assignment Information</b> Client: Best Law Firm Attorney: Attorney, Bob Location: Conference Room: Alpha Room 2739 Dennison Street Suite 230 Los Angeles, CA 95351				Assignment Date: 09/24/2019 Start Time: 8:00 AM MT Estimated Length: 4 Hours Rooms: 0 Meals: 0 Reporters: 0 <input checked="" type="checkbox"/> Print Notes on Confirmations	
<b>* Requires dedicated staff</b>					
Services	Assigned Staff	Confirmation Sent	Confirmation Status	Confirmed On	Confirmed By
Videography*	Pattern, Georgia L	<input checked="" type="checkbox"/>			
Stenography*	Erby, Jeffrey M	<input checked="" type="checkbox"/>	Confirmed	09/26/2019 5:26	Master User

- When a client has been sent the confirmation for an assignment, a checkmark will be shown next to the **Send Confirmation** button on the Assignment details window as well as the Manager view of the schedule.

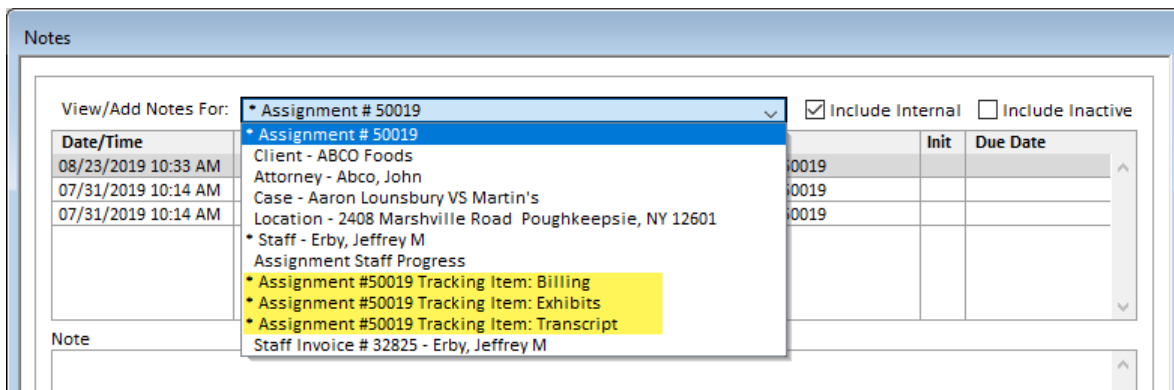


Manager View of Schedule

- When entering the check-in information for a provider on the Staff Progress window, the check-in time will automatically populate with the assignment's start time after you fill in the check-in date. If you clear out the time, the check-in will still be saved but with a time of 12:00AM. [SD-1286]
- The **Create YesLaw Files** window from the Assignment Files window now shows a **Select All** button and a **Deselect All** button to make it easier to select a large number of files for the YesLaw Generator. [SD-1313]

## ASSIGNMENT TRACKING

- Regular notes can now be entered on tracking items, such as Transcript and Exhibit items. The Notes window will show these items listed on it when you are viewing an assignment. [SD-1272]



You will also see the **Notes** button on the bottom of the Assignment Tracking Board when you have one tracking item selected in the list. These notes can be assigned to users to view in the My Reminder Notes window.

- New columns were added to the Assignment Tracking Board to show the **Deponents**, **Location City**, **Location State** and **Assignment Type** from the related assignment of each item. Click on the cogwheel icon in the top, right corner of the list to show this column in each list. [SD-1310,1311,1318]

## ORDERS

- A search option on **Assignment #** was added to the search window for the Orders list window. [SD-1285]
- A new column was added to the Orders list window to show the **Assignment Status** field from the order's assignment. Click on the cogwheel icon in the top, right corner of the list to show this column. [SD-1315]
- Orders and invoices will now make sure that you enter a billing attorney when saving if you are integrating with ServiceLink. This will prevent errors coming back from ServiceLink regarding this. [SD-1314]

## INVOICES

- A new column was added to the Invoices and Staff Invoices list windows to show the **Paid On** date from the invoice. Click on the cogwheel icon in the top, right corner of the list to show this column in the list. [SD-1273]
- A new column was added to the Staff Invoices list window to show the **Assignment#** field from an assignment. Click on the cogwheel icon in the top, right corner of the list to show this column. [SD-1274]

- A new search option was added to the Invoices and Staff Invoices list windows to search for all invoices for a specific **Assignment#**. [SD-1293]
- An option was added to the **Invoices** tab of System Preferences to print the **Court Docket#** on client invoices. (Check your languages settings for the name you have given this field.) [SD-1284]

**System Preferences**

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

Default Invoice Print Type:

Default Invoice Terms:

Default Insurance When One on Assignment  
 Lock Order Items After Invoice Sent  
 Manually Mark Invoices Ready to Export to Sage  
 Use Product Tax Templates

Included Items on Printed Invoices

<input checked="" type="checkbox"/> "PAST DUE" on Overdue Invoices	<input checked="" type="checkbox"/> *New invoice format only	<input checked="" type="checkbox"/> *Services Requested
<input checked="" type="checkbox"/> Assignment Start Time	<input checked="" type="checkbox"/> *Affiliate Assignment Number on Scheduling Client's Invoice & Statement	<input checked="" type="checkbox"/> *Client Tax ID
<input checked="" type="checkbox"/> Case	<input checked="" type="checkbox"/> *Client Case#	<input checked="" type="checkbox"/> *Purchase Order#
<input checked="" type="checkbox"/> Billing Reference	<input checked="" type="checkbox"/> *Court Docket#	
<input checked="" type="checkbox"/> Shipped On Date and Method	<input checked="" type="checkbox"/> *Assignment Location Address	
<input checked="" type="checkbox"/> Staff Name	<input checked="" type="checkbox"/> *Order Delivery Type	
<input type="checkbox"/> Link to ServiceLink Order		

Default Deponent Subheadings

Include Original/Copy Transcript Type  
 Include Assignment Type  
 Include Volume Number

- You can now override the guarantee type on a staff invoice that has not been paid. A drop-down list will be shown where the guarantee type name used to be. This allows you to switch which guarantee type to use from the default selected for the staff person on the invoice. Note that the **Next Pay Amount** will be recalculated when you save changes. [SD-1300]

Original Sent:

Due Date:

Paid On:

Next Pay Amount: \$ 102.93

If you are using split staff invoice pay, you will see a drop-down list for each "split bucket".

Type	Due Date	Guaranteed Type	Amt Due	Amt Paid
Originals	<input type="text" value="10/01/2019"/>	<input type="text" value="30 Days Guaranteed"/>	\$ 1,140.48	\$ 0.00
Copies	<input type="text" value="10/01/2019"/>	<input type="text" value="Non-Guaranteed"/>	\$ 906.40	\$ 0.00
Misc	<input type="text" value="10/01/2019"/>	<input type="text" value="30 Days Guaranteed"/>	\$ 90.00	\$ 0.00

- The STATE field was removed from the LEDES 98B formatted invoice export file as this field is not part of the standard LEDES 98B specifications. [SD-1325]

**TRANSACTIONS**

- A new column was added to the Transactions list window to show the **Memo** field from a transaction. Click on the cogwheel icon in the top, right corner of the list to show this column. [SD-1275]

**REPORTS**

- **Assignments ► Assignments Scheduled by Salesperson:** This new report lists all assignments that are scheduled on the report date and the day after by salesperson by each entity they have commissions on. [SD-1277]

This report has the option to send a separate report to each salesperson. The email subject and body text for emailing this report to each salesperson can be entered in Standard Report Text.

## Assignments Scheduled by Salesperson Report

Email Subject	Assignments Scheduled by Salesperson Report	[X]
Top of Email	Attached is a copy of your report for today.	[X]

- **Assignments ► Assignments Received:** The assignment location address for each assignment was added to this report. [SD-1279]
- **Orders/Products ► Billing History:** This new report lists the invoices created during a date range by the biller who created them. [SD-1310]
- **Orders/Products ► Invoice Charges:** The invoice Sent Date was added to the detailed version of this report. [SD-1283]
- **Attorneys/Contacts ► Non-Requesting Attorneys:** The assignment location (city and state) was added to this report. [SD-1279]
- **Staff ► Distance Traveled:** This new report will be listed if the Geography feature is turned on. It prints the distance traveled in miles/kilometers by staff for each assignment within a date range. It includes total miles/kilometers plus average miles/kilometers per assignment per staff. [SD-1043]
- **Staff ► Staff Commissions Setup:** The commissions start date was added to this report. [SD-1319]
- **Collections ► Accounts Receivable:** An option was added to this report to **Include Collection Notes**. This will print the collection notes for the collection itself and for the client under each client listed on the report. [SD-1305]
- **Financial ► Client Invoice Profit:** Two new fields were added to the list on this report: invoice sent or due date (depending upon what you choose when you run the report) and the assignment location state. [SD-1296] In addition, an option was added to this report to **Include Staff Pay Not Tied to Client Invoices**. This will include a list of staff invoices for the sent or due date with the amount of pay for all items that are not tied to a client invoice (such as expenses). [SD-1298]

## ISSUES RESOLVED

### REGISTRATION

- If an incorrect Solaria license number was entered on a workstation, it was giving an “expired license” error. This has been resolved to give the correct error message. [SD-1327]

### HOME WINDOW

- The **Assignment Work Completed but No Orders** Home window statistic will no longer count assignments that have skipped the “Create Orders” task. [SD-1328]

### LIST WINDOWS

- Viewing the search results of a list window without any search criteria entered will no longer show the name of the items at the end of the text displayed above the list. [SD-1299]
- An ampersand entered in an order note will now display correctly in the **Order Notes** column of the Orders list window. [SD-1317]

### DIRECTORY DATA

- The **Pay Templates** drop-down list on the Company and Staff maintenance windows will now show more templates in the list and they will be in alphabetical order. [SD-1331]
- When changing more than one name field for an attorney, contact, deponent or staff person, it will no longer prompt you to confirm the name change multiple times. [SD-1213]
- When viewing notes in the maintenance windows for directory data, it will now show the internal notes whenever the **Include Internal** checkbox is turned on. [SD-1333] Also, changing the **Include Internal** checkbox will no longer override your saved preference in My Settings and will only be remembered for your current logon session. [SD-1334]

## ORDERS/INVOICES

- When using the **Clear List** button on an order, Solaria will now check that the items being removed are not paid on a staff invoice yet and return an error if any are. [SD-1316]
- The invoice export to the LEDES 98B format will no longer create extra spaces between each character in the text file it creates. [SD-1323]
- After changing the template on a staff commissions invoice, it will no longer give a SQL error when saving the invoice. Also, if it adds items to the invoice, it will properly calculate the amount due on the new items. [SD-1312]
- The Next Pay Amount on staff invoices will now include the amounts on line items with a negative amount due for products that clients have paid for. This has been resolved on the staff invoice window as well as when running the Payables report. [SD-1336]

## TRANSACTIONS

- When creating or viewing a payment for a staff invoice when doing split pay, it will now correctly list "Originals" for the invoice lines that are for originals pay. [SD-1307]

## COLLECTIONS

- When viewing the notes for a collection, it will now show the "Collection Notes for Client" line item in the top drop-down list by default. [SD-1306]
- When printing a collections statement to just one client and sending it to the Email destination, it will now address the email message to the client's Invoice/Statement Preferred Destination email address, if it is populated. [SD-1301]

## LETTERS & REPORTS

- When printing letter templates, the Job.Case.ClientCaseNumber field will now be populated with the client's case number. [SD-1329]
- When emailing billing letters to attorneys, it was not always putting the recipient's email address in the billing note that is created for it. [SD-1332]
- When printing staff statements and a selected staff person does not have any items to print, the information message will now include their name as this was erroneously missing from the message. [SD-1335]