

Acclaim Solaria 6.2 Release Notes



6.20 Release

SPECIAL NOTE ABOUT UPGRADING

This version runs on Windows 64-bit only.

When upgrading from a previous version of Solaria to 6.20, you will need to enter a **NEW LICENSE NUMBER**. These will be emailed to contacts at each site. You may also call or email support@acclaimlegal.com to get your license number(s).

Each user will also need to re-enter your Workstation Settings as these are set up for each computer for each license number. Since you will have a new license number, your previous workstation settings cannot be retrieved. (We suggest taking a screenshot of it before upgrading.)

6.20.023 Update

ISSUES RESOLVED

- When sending emails using the Simple Email Messages setting (instead of Outlook), it will no longer return an error if you are sending to multiple email addresses. [SD-1428]
- When changing an attorney name, the full name of the attorney will now be properly calculated to include the middle name. [SD-1461]

6.20.022

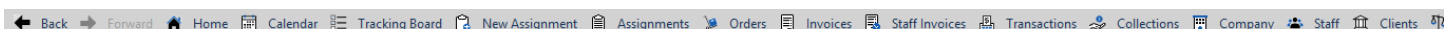
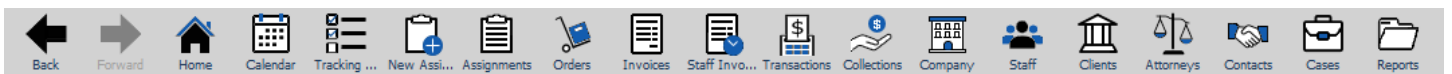
ENHANCEMENTS

USER INTERFACE

Acclaim Solaria has been updated with a new look! You'll see improvements in the look of Solaria throughout the application. New features have also been added as described below.

Toolbar

The toolbar icons and colors have been updated. In conjunction with this, the **View** menu has a new sub-menu called **Toolbar** which has several options to show/hide the toolbar, use large or small icons, and use full text or not. (Full text puts the full name to the right of the icons instead of underneath them.) Note if you do not use full text, it puts as much text as can fit underneath the icons. There are now tool-tips on the icons if you hover over them. [SD-1345]



Icon Buttons

The text link buttons were replaced with icon buttons. Hover over the icons to see the tooltip on what they do. [SD-1358]

Assignment Details

Client

Name

Address

Attorney

Name

Phone Fax:

Email:

Opposing Counsel

Status: New

Assignment Information

Start Time AM MI

Length Hours

All Day

Was Rescheduled

Repeat Select Dates (0)

Number of Attendees

Color Select One

Code Select One

Type Deposition

Also note that the Assignment Details “Send Client Confirmation” button will show a white open envelope if a confirmation has not been sent. It will show a black closed envelope if a confirmation has been sent.

12:00 PM MT

Select All/Deselect All

All “Select All” and “Deselect All” buttons were replaced with a single checkbox at the top left side of a list to control checking all or unchecking all items in a list. [SD-1348]

Select File User Access

Attorneys	Can View?
<input checked="" type="checkbox"/> Demeo, Betty R at Vitae Sodales Nisi f	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Fields, Chau T at Natoque Penatibus E	<input checked="" type="checkbox"/>

Column Drag & Drop

You can now drag and drop columns in the main list windows to rearrange the columns in the list. [SD-1353]

Assignments

Show Date Range: From 01/15/2015 To 01/31/2015 Go

Assignment#	Date	Time	Client	Attorney	Deponent	Status
DM-48679	01/26/2015	1:00 PM	Accumsan Laoreet Company	Moss, Sara S	Townsend, Stella G III	Complete
DM-48872	01/26/2015	2:00 PM	Aenean Euismod Inc.	Nieto, David P	Curry, James H	Complete

Drag & Drop Files

You can now drag and drop files from your desktop or Windows Explorer to an assignment on the Assignment Files window. Drag and drop works directly on the main window and on the Add Files pop-up window as well. [SD-1354]

Print Preview Changes

When printing a report to the Preview destination, the Print Preview window now shows thumbnails of each page, has new Zoom options and has a button to Save to PDF.

Demonstration

Staff Product Sales
Staff Invoices Sent 01/01/2019 to 12/31/2019

Description	Units	Qty	Avg Price	#Invoices	Amount Billed	Paid Out	Profit
Aker, Carol J							
Attendance	6.00	2.00	\$ 75.00	2	\$ 450.00	\$ 300.00	\$ 150.00
Captioning	1.58	1.00	\$ 150.00	1	\$ 237.00	\$ 165.90	\$ 71.10
Copy E-Transcript	152.00	1.00	\$ 3.25	1	\$ 494.00	\$ 196.95	\$ 297.05
Document Copying	0.00	0.00	\$ 0.00	0	\$ 0.00	\$ 200.00	\$ -200.00
Original & One Copy PDF	100.00	1.00	\$ 4.25	1	\$ 425.00	\$ 297.50	\$ 127.50
Original & One E-Transcript	152.00	1.00	\$ 4.25	1	\$ 646.00	\$ 196.95	\$ 449.05
Original & One Paper Copy	101.00	2.00	\$ 4.88	2	\$ 430.50	\$ 388.13	\$ 42.37
					\$ 2,682.50	\$ 1,745.43	\$ 937.07
Erby, Jeffrey M							
Attendance	19.42	11.00	\$ 75.00	11	\$ 1,456.50	\$ 1,869.00	\$ -412.50
Attendance-Minimum Fee	5.00	3.50	\$ 152.50	4	\$ 610.00	\$ 427.00	\$ 183.00
Audio Copy	4.00	4.00	\$ 37.50	4	\$ 150.00	\$ 70.00	\$ 80.00
Captioning	3.50	3.00	\$ 150.00	3	\$ 525.00	\$ 257.50	\$ 267.50

Page 1 of 2 | Zoom factor 100.00%

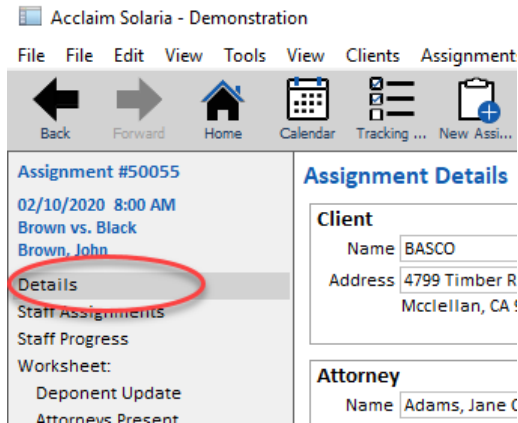
Color Selections

All places where you select a color will now use the following color selection window which provides more options than the old color selection window. [SD-1356]



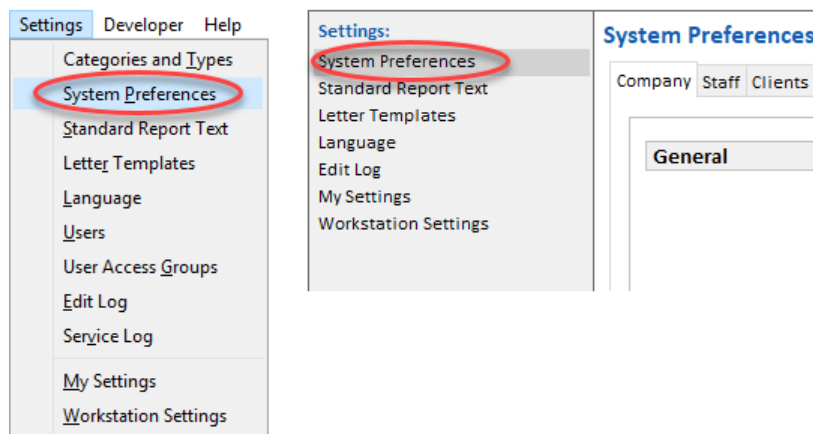
Assignment "Main" ► "Details"

When viewing the main assignment details window, the left options panel will show "Details" now instead of "Main".



Settings Menu

The Settings menu **Preferences** option was renamed to **System Preferences** to match the window name.



Product Tasks ► Order Tasks

The **Product Tasks** option under **Categories and Types** was renamed to **Order Tasks** to match the name used in the assignment windows. [SD-1397]

Caller ► Contact

The name/term "Caller" was replaced with "Contact" throughout the application for consistency. [SD-1384]

Schedule ► Calendar

The name for the schedule was changed from "Schedule" to "Calendar". [SD-1385]

System Preferences

The System Preferences window was updated to group options together on each tab so options can be found easier. (Note that items may be in a different order than they used to be.)

System Preferences

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

General

Company to Load at Startup:

Calendar Text to Use:

Show Start Time for All Day Assignments

People/Addresses

Data Sharing: Share Client Data Among Companies
 Use Unique Billing Reference Between Companies
 Share Staff Data Among Companies

People Names: Save Names as "Last, First Middle Suffix" Save Names as "First Middle Last Suffix"

Default Address City:

Default Address State/Province:

Default Postal Code:

Reports/Emails

Mailing Address Type (for mailable reports):

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

Report Text Colors: Report Title
Report Subheading

Localization

Currency Format:

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

Time Format: 12 Hour 24 Hour

MEDICAL RECORDS

A new company type was added called "Medical Records" to use for this type of business. This can be selected on the Company Details window. [SD-1355]

Medical Records

Company Name: Code:

Type:

Phone Numbers

Direct:

Toll-Free:

Internet

Website:

Email:

The company type of "Medical Records" can be assigned to Assignment Types, Case Types, and Services to filter these options on assignments.

When a company that has a company type of "Medical Records" is used, new options are shown in Solaria as follows:

1. **Categories and Types** shows an option called **Scopes** to enter the different scopes you need to send in letters. These allow you to use fields to put values of assignment fields in the text of the scopes.

Set Up Scopes

Description	Active	Available Fields (Drag to Text)
Any and all personnel records, including but not limited to, employment records, applications, references, training manuals, training completed, awards, reviews, reprimands, insurance records, benefits and/or workers' compensation records	<input checked="" type="checkbox"/>	Address1 Address2 City DateOfBirth DirectPhone EmailAddress EmployedBy ExpertiseType Fax FullName IncidentDate MobilePhone Notes Pager PersonalNum PostalCode StateCode
Any and all phone records, including but not limited to statements, invoices, long distance charges and any other record in your file	<input checked="" type="checkbox"/>	
Any and all prescription records	<input checked="" type="checkbox"/>	
Any and all psychological/psychiatric records, including but not limited to, notes, tests and/or test results, prescriptions, correspondence of any kind to and from patient and/or attorneys and any other document in your files	<input checked="" type="checkbox"/>	
Any and all records as described on the attached Exhibit 'A'	<input checked="" type="checkbox"/>	
Any and all records as described on the attached Exhibit 'B'	<input checked="" type="checkbox"/>	
Any and all records pertaining to {FullName}, {DateOfBirth}, {PersonalNum}, {ExpertiseType}, {Address1} {Address2} {City}, {StateCode} {PostalCode}	<input checked="" type="checkbox"/>	
Any and all workers compensation, claims, billing and medical files and/or records, including but not limited to, history, office notes, diagnostic reports, psychiatric records, reports, diagnoses, narratives, films, scans, correspondence prepared or received by any healthcare provider, claims representative and/or attorneys and any other records in your possession	<input checked="" type="checkbox"/>	
Any and all x-ray films, including but not limited to, any and all CT Scans and MRI's	<input checked="" type="checkbox"/>	
Please provide the Form 3616 for the following facility for the calendar year(s) requested in the attached Exhibit "A". Please de-identify all names except for {Records Of}. For your convenience we have attached an authorization signed by our clients.	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	

2. **Categories and Types** shows an option called **Service Scopes** to assign scopes to different services.

Assign Scopes to Services

Service: **Medical Records**

Scope

- Any and all academic records, including but not limited to, transcripts, tests, grades, test results, nurses records, physical education records, counseling records, attendance records, and all correspondence
- Any and all Audio Recordings of 911 calls and/or call sheets pertaining to the transport to
- Any and all benefit records, including but not limited to 401k plans, profit sharing plans and/or benefits, workers' compensation records, retirement plans and/or benefits and any other benefits paid
- Any and all billing records, including but not limited to, any and all itemized billing statements
- Any and all color photographs, video tape, audio tape, and/or any other electronic media pertaining to {FullName}, {DateOfBirth}, {PersonalNum}
- Any and all criminal records including but not limited to detailed case (cause) information, such as bond information, payment plans, case settings, activities, documents and/or appeals
- Any and all dental records, including but limited to patient information sheet, notes, x-rays, correspondence and any other document reduced to writing
- Any and all medical and billing records, including but not limited to, all reports, notes, tests, test results, diagnoses, prognoses, office records, clinic records, therapy records, correspondence to or from the patient or concerning the patient, memorandum, photographs and all itemized statements
- Any and all pathology records, including but not limited to, slides, blocks, and reports of any kind pertaining to {FullName}, {DateOfBirth}, {PersonalNum}
- Any and all payroll records, including but not limited to, any and all payroll records, wages earned, W-2 forms and time sheets
- Any and all personnel records, including but not limited to, employment records, applications, references, training manuals, training completed, awards, reviews, reprimands, insurance records, benefits and/or workers' compensation records
- Any and all phone records, including but not limited to statements, invoices, long distance charges and any other record in your file

3. When on an assignment for a Medical Records company, a new option was added when you select **File ► Send to Word**.

Send to Microsoft Word

Select Export Type:

Request Information
Medical Records Request Information

Export Data Only (Do not use Microsoft Word)

Cancel OK

Select the "Medical Records Request Information" option and the following window displays allowing you to select the data you want exported. It shows all assignments ("requests") for the same case as the current assignment you are viewing by deponent ("patient") with each staff person ("custodian") assigned to them. It also shows all attorneys present on those assignments. When sending a letter to an assigned staff person, select the assignment with that person's name on it. It will export one record for that assignment and staff person and include all scopes assigned to the services they are assigned to. One record will be exported per line selected in the top list. Each record will contain the attorneys present selected in the bottom list.

Medical Records Export

Patient: **Runner, Amy** User Reference: 12345

Requests	Attorney	Client	Custodian	Services
<input type="checkbox"/> 50035	Couch, George	Best Law Firm	Children's Hospital	Medical Records
<input checked="" type="checkbox"/> 50037	Attorney, Bob	Best Law Firm	Monaco, Alicia	Phone Records
<input type="checkbox"/> 50040	Attorney, Bob	Best Law Firm	Blair, David M.D.	Billing Records; Medical Records

Attorneys	Client	On Behalf Of	Street Address	City, State, Postal Code
<input type="checkbox"/> Attorney, Bob	Best Law Firm	Plaintiff	PO Box 1234	Fort Collins, CO 80525
<input type="checkbox"/> Couch, George	Best Law Firm	Defendant	PO Box 1234	Fort Collins, CO 80525

Cancel OK

Letters can be created by first exporting only the data to a file then creating a Word document of the same file name but with the .docx extension.

TRACKING ITEMS

You can now pre-define a list of tracking items and assign them to services. When a service is used on an assignment, it will add the tracking items for that service automatically. You can also select any of the tracking items when manually adding them to an assignment. You can then turn on any of these tracking items you want to use on an assignment. Only the system-defined tracking items already shown in Solaria will automatically turn on when staff check out of an assignment (if you have **Automatically Turn On Tracking Items** turned on in System Preferences). [SD-1367]

Go to **Settings ► Categories and Types ► Tracking Items** to enter the tracking items. Four system-defined items are entered for you as each can automatically be tracked on assignments based upon worksheet entries.

Set Up Tracking Items

Description	Active
Backorder	<input checked="" type="checkbox"/>
Billing	<input checked="" type="checkbox"/>
Exhibits	<input checked="" type="checkbox"/>
Medical Item	<input checked="" type="checkbox"/>
Rough Disk	<input checked="" type="checkbox"/>
Scope	<input checked="" type="checkbox"/>
Transcript	<input checked="" type="checkbox"/>
Video	<input checked="" type="checkbox"/>

Go to **Settings ► Categories and Types ► Service Tracking Items** to assign the tracking items to each service. Note that the four system-defined tracking items were automatically assigned to each service for backwards compatibility.

Assign Tracking Items to Services

Service:

Description
<input type="checkbox"/> Backorder
<input checked="" type="checkbox"/> Billing
<input type="checkbox"/> Exhibits
<input checked="" type="checkbox"/> Medical Item
<input type="checkbox"/> Rough Disk
<input type="checkbox"/> Scope
<input type="checkbox"/> Transcript
<input type="checkbox"/> Video

ASSIGNMENTS

- The client and attorney warnings will now display in red on the Attorneys Present and Order windows below the client/attorney names. [SD-1381]

Attorneys Present	
Attorneys	Mailing Address/Phone
Adams, Jane Q BASCO	4799 Timber Ridge Road McClellan, CA 95652 Phone: [REDACTED] Fax: [REDACTED]
Attorney, Bob Best Law Firm	PO Box 1234 Fort Collins, CO 80525 Phone: 303-123-9765 Fax: [REDACTED]
CREDIT HOLD Black, Junior JJ's Insurance	Fort Collins, CO 80525 Phone: [REDACTED] Fax: [REDACTED]

- If you are integrating with ServiceLink, you can customize the text that is used for the **Can Take/Cannot Take** radio buttons that can be selected for staff confirmations. Go to **Settings ► System Preferences ► Staff tab ► Confirmations** section and modify the **Confirmation Type** responses. [SD-1387]

Company	Staff	Clients	Cases	Assignments	Orders	Invoices	Interfaces
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Confirmations

Include Items on Printed Confirmations

<input checked="" type="checkbox"/> Invoice Remarks for Ordering Client/Attorney	<input checked="" type="checkbox"/> Assignment Notes
<input checked="" type="checkbox"/> Previous Appearances for Case	<input checked="" type="checkbox"/> Assignment Location
<input checked="" type="checkbox"/> Previous Orders for Case	<input checked="" type="checkbox"/> Case Notes
<input type="checkbox"/> Exclude Other Services	<input checked="" type="checkbox"/> Client Notes
<input type="checkbox"/> Exclude MS Outlook Appointment ICS File Link	<input checked="" type="checkbox"/> Attorney Notes
<input checked="" type="checkbox"/> Use Custom Letter Template for Confirmations (Entered in Letter Templates)	

Default Confirmation Status: Confirmed

Confirmation Type Positive Response: Can Take

Negative Response: Cannot Take

These will then show on the confirmation window.

Confirmation

Confirm that Ball, Helen T will be doing the following services for this assignment: Videography*

Phone: 410-406-6388
Mobile: 410-406-6388
Fax:

Confirmed By: Master User

Status: Select One

Notes:

Staff: Cannot Take Can Take

Staff Note:

Confirmation Complete

Confirmed On: [] []

Cancel OK

- When entering assignment information in windows besides the main Assignment Details page and integrating with ServiceLink but the assignment has not been sent to ServiceLink yet, Solaria will send the assignment information to ServiceLink when the window is saved. For example, if saving an order where the assignment has not been sent to ServiceLink, Solaria will send all assignment information before it sends the order. This refers to the Assignment Details, Staff Assignments, Staff Progress, Deponent Update, Attorneys Present and Files. [SD-1369]
- When a manual fetch is done on the Staff Progress window, it will bring in any files added by the provider on the worksheet. It will also redraw the window to show the changes that were brought in. [SD-1401]

INVOICES

- New preferences were added for leaving **Original Sent On** dates blank when new client or staff invoices are created. It will leave them blank until a user enters them, or when you print the invoice. When printing the invoice, it will prompt you if you want Solaria to enter the current date for the sent date automatically before it prints. [SD-1391]

Client System Preferences:

Invoices

Guaranteed Pay Split Staff Pay by Product Type

Default Guarantee Pay Type: 45 Days Non Guaranteed

Order Pay Items: Use Staff Billable Hours Use Deponent Billable Hours

Calculate Commissions On: Gross Invoice Amount Profit

Original Sent On Date: Use Date Invoice Created Leave Blank - Prompt to Enter When Printing

Staff Pay: Pay Invoices with No Due Date Pay Taxes on Staff Invoices

Staff System Preferences:

General

Default Invoice Terms: Due on Receipt

Original Sent On Date: Use Date Invoice Created Leave Blank - Prompt to Enter When Printing

Order Items: Lock Order Items After Invoice Sent

Insurance: Default Insurance When One on Assignment

- When a client invoice is saved, Solaria looks for staff that could get commissions on that invoice. If it finds staff that get commissions and they already have a commissions invoice on the job, it will update that invoice unless it is paid/partially paid, posted or auto-updates are turned off. If it cannot update the commissions invoice (and the commissions invoice didn't already have that client invoice on it), it will display a prompt asking if you want to create a new commissions invoice for the staff person or not. This way it will pay commissions on late copy orders and such. [SD-1382]

TRANSACTIONS

- A few updates were made to accommodate paying staff with business names. [SD-1346]
 - The Payment window will now show the **Payee** field on the window for staff payments and you can change it if needed. Payments to staff made from this point on will show their name in the **Paid To** field and their business name in the **Payee** field. (Both fields will show the person's name if they don't have a business name.)

Payment Information Client Staff

Date: 01/23/2020 Amount: \$ 218.50 Payment Method: ACH

Paid To: Erby, Jeffrey M

Memo:

Company: Demonstration

Payee: Erby Reporting

- When searching for staff invoices to pay on the transaction window, it will show the person's name instead of the business name in the list of unpaid invoices.
- The printed receipt will show the Payee/Payor above the Paid To/By person's name in the address area for both client and staff transactions. If these are the same, it only shows the one Paid To/By name.

Erby Reporting
Erby, Jeffrey M
633 Atwood Court
Fort Collins, CO 80525

Staff Payment

- The Transaction List window will now show **Paid To/By** as the existing column and a new **Payee/Payor** column was added to match the fields shown on the transaction window. To see the **Payee/Payor** column, click on the cogwheel icon in the top right corner of the window.
- When entering a new receipt for a client payment and entering a partial client name, the search results window will now include each client's city and state from their address. [SD-1393]

SALESFORCE INTEGRATION

A new option was added to System Preferences to **Integrate with Salesforce**. Turning on this feature allows users to run Salesforce-specific reports and run a Windows service each day to fetch and send information from Salesforce. Note this feature is highly customized – please contact support if you wish to use this feature. [SD-1352]

REPORTS

- Assignments: The “Assignments Canceled” report was updated to have an additional option on it to only include assignments that were canceled within X hours before the start time of the assignment.

The information on when exactly it was canceled and how many hours' notice was given will be printed instead of the assignment location on this report. [SD-1350]

- Clients: When integrating with Salesforce, a new report called “Salesforce Changes” was added to list the account changes made in Salesforce for a date range and what type of change was made. [SD-1352]
- Clients: When integrating with Salesforce, a new report called “Salesforce Revenue Update” was added to list the revenue for clients for a date range. It indicates if the revenue is found for the account already or the account is not found in Salesforce. (Note that running the report does not insert opportunities into Salesforce like the Windows service does.) [SD-1352]
- Attorneys/Contacts: The “Non-Requesting Attorneys” report can now be run for an order or invoice sent date range in addition to running it by an assignment date range. The report will now include the client phone number and order date. [SD-1392]
- Orders/Products: A new report was added called “Orders After Commissions Paid”. It lists orders placed within a date range that were made after the staff commissions were paid. [SD-1375]
- Orders/Products: The “Product Sales” report was updated. [SD-1339]
 - A **Commissions** column was added to list the commissions paid on a product (as this was not included in the amount paid out before).
 - The **Paid Out** column now shows the amount on staff invoices for the products tied to the client invoices that are listed.
 - A new option was added to print a detailed version of the report. (The current report is considered the “summary” report.) The detailed version of the report totals the product sales by product and by client invoice. Additional fields are included in the export to TAB/Excel when printing the detailed report.
- Staff: “Payables” Report:
 - A new option called **Suppress Guar Type Names** was added to the **Include Guaranteed Type** section of the “Payables” report. Checking this will print invoices for all guarantee types together and not print the guarantee type names. [SD-1376]

- The staff type will now print below the staff's phone number on the "Payables" report. [SD-1390]
- A new detailed report option was added to the "Staff Commissions" report. Printing the detailed report will include information on each client invoice related to each staff commissions invoice in addition to the assignment date and number. The Detail Type options also provide an option to include invoices that have \$0 commissions on them. [SD-1368] You can also select whether to use the staff invoice dates or the client invoice dates for the report (if you are not running it by assignment date). [SD-1374]

- Statements: Currently the aging buckets at the bottom of statements are calculated based upon the due dates on the invoices. A new System Preference was added to use the invoice original sent on dates on the invoices instead. This new preference can be found on at **Settings ► System Preferences ► Invoices tab ► Accounting** section and is called **Statement Aging Buckets**. It will default to **Based Upon Invoice Due Date** to match the current calculation type. This setting will now be used on client, attorney and case statements. [SD-1377]

- Financial: "Export to QuickBooks":
 - The export to QuickBooks has new options when exporting receipts and payments. You can choose to use the **Paid To/By** name from the transaction or the **Payee/Payor** name in the exported data. Note if using the **Payee/Payor** name but it is found blank on a transaction, the **Paid To/By** name will be exported instead. [SD-1386]
 - It will now only export out up to 41 characters for names and addresses as that is the character limit for the QuickBooks import. Names or addresses longer than that will be cut off after 41 characters. [SD-1388]

- When exporting staff invoices to QuickBooks, any taxes paid on staff invoices will now be included in the export file. (This is only for users that have **Pay Taxes on Staff Invoices** turned on in System Preferences.) [SD-1394]

MISCELLANEOUS ENHANCEMENTS

- The main lists will now load faster when loading a large list and zebra striping is turned on. [SD-1364]
- Users can now enter passwords that are up to 50 characters long. [SD-1366]
- The All Department Tasks and All Department Order Tasks windows will now show the company name for each department listed in the Department drop-down list. [SD-1363]

ISSUES RESOLVED

- Double-clicking on a ServiceLink assignment request from the Schedule, Assignments List or Service Log will now switch companies if the request was for a company other than the current company you are using. [SD-1365]
- When a contact was used on an assignment and later expired, the contact will now show correctly on that assignment. [SD-1389]
- When applying more than one order template to an order, it will first make sure your cursor is on a new line with only a deponent selected on it. If a product is already selected on the line, it will display a message and won't prompt for a template to use. This prevents a subsequent template being applied from missing one of the products on the template. [SD-1378]
- When writing off or updating an entire client invoice to \$0.00 amount due and balance, it prompts you if you want to mark the invoice as paid. Doing so will now mark all items as paid so that payment can be released to staff invoices that are pay when client pays. [SD-1370]
- When adding new line items to an invoice and selecting the product on them, you will no longer get the warning about changing the item if the order has already been shipped. The warning will only display if you change a product of an existing line item already saved on the invoice. [SD-1372]
- When charging taxes on a client invoice and the invoice only has one line item on it and that line item is taxed, the tax amount will now be printed with the totals at the bottom of the invoice. [SD-1379]
- After editing the price or tax of an order item on a client invoice, adding an Invoice Charge will no longer show an amount on it. [SD-1398]
- Items added to staff invoices automatically that are paid at an hourly rate but do not have a pay rate will now be entered as Hourly instead of Flat Fee. Also items manually added to a staff invoice that do not have a pay rate will automatically select the pay rate specified on the product set-up instead of showing "Select One" for the pay type. [SD-1371]
- After voiding a staff invoice then removing a related line item from a client invoice, it will no longer return a SQL error. [SD-1207]
- The Staff Commissions report will no longer include staff commissions invoices that are voided. [SD-1373]
- When sending client confirmations in bulk using the Reports --> Clients --> Email Notifications option, it will now save the first assignment as confirmed. [SD-1404]
- When creating a new assignment with a new case on it and no deponents, the assignment will no longer show with the "Unknown/Not Applicable" case on it in ServiceLink. [SD-1405]

AS620B021

- The add/remove icon buttons for the invoice charges on an invoice will no longer show on paid invoices. (This problem wasn't introduced until 6.20.) Fixed in 6.20.018. [SD-1406]
- After making changes on a window then clicking on a toolbar icon, it will now prompt you if you want to save changes or not or cancel and stay on the current window. (This problem wasn't introduced until 6.20.) Fixed in 6.20.018. [SD-1407]
- When adding a new user to Solaria, it will now clear out the password field to enter a new password. (This problem wasn't introduced until 6.20.) [SD-1410]

- When adding a new user to Solaria, selecting a color for the lists will now show the colored stripes in the sample list on the window. *[SD-1411]*
 - When a contact is updated in Solaria and they had previously been sent to ServiceLink, but they are not showing any associations to a client or attorney, the contact will no longer get deleted in ServiceLink. An error message will display when trying to save the contact explaining that you must associate them with either a client or an attorney. *[SD-1413]*
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AS620B022

- On the Staff Assignments window, the drop-down list to filter the staff shown for the selected service will now properly default to the option selected in System Preferences. *[SD-1426]*