Sovereign LAW W252 Additions

Source Codes
The existing program in Utilities –Module Parameters –Source Codes -Sources has been modified. After using the Amend option to change the source code and descriptive text and 'Accepting', the program automatically reads through the client database records (and the group data records) updating the source code and source text fields as required.

Source Codes, Contact Details and File Switch
A new Contacts option allows contact names and details to be set up and stored.
The File Switch option can be set as follows:
blank – Source Code set in Client Record only as previously (no effect on File Record)
source –Source Code can additionally be set in the File Record as well (new box is displayed just after completing Summary field). Effectively, this is a file-related source code.
contact –Contact details can be set in File Record

The Tab Enquiries –Misc Info option can be used to view the file related Source or Contact details.

Tab Enquiries -On Line Time Recording
Modified Tab Enquiries with Rec WIP option. This allows time records to be entered directly on to the file using the Line by Line Time Sheet entry program.
[Refer to separate documentation].

Database Details
In order to speed up the set up of new client records and file records, the following amendments have been incorporated:

(i) If Client Care TOB flag in the client record is set to 'No', then the Bill Frequency and On Account fields in the file records are skipped (irrespective of the category / charge band)

(ii) If the file record is Legal Help (ie. Category L; Charge Band set as Legal Help) then the Legal Aid Certificate details fields are skipped. These fields are only really required for Certificated work. The Quality Criteria screen is still displayed. The subsequent SPAN screen should be used for Legal Help files.

(iii) If the file is CDS, then the L/A certificate screen is automatically completed with the UFN details (as display only). The Quality Criteria screen is still displayed. The subsequent SPOCC screen should be used for CDS files.

[NB. The Utilities –Module Parameters –Client/File & Options – Options (2^{nd} screen) can be used to skip other fields in the Client Record if required].

Money Laundering Update
New suite of programs to facilitate the recording of monitoring of Client ID and validation information.
[Refer to separate documentation].

Unique Client Number
The UCN (Unique Client Number) for Immigration cases can now be recorded in the Client Record –Personal Details section.

LSC Civil & CDS Update (November 2004)
Revised codes and procedures for Civil and Criminal Block contracting.
[Refer to separate documentation].

Time Sheet Posting
Modified time sheet posting program now allows up to 180 matter type codes to exist in the system.

Office Journals
General Posting - Office Journals program amended to allow journalled disbursement postings (503's) and journalled expenses (703's) to be further journalled.

Whilst scrolling down the list of postings, the message Possible Journal does NOT appear. Selecting the posting gives a !! Journalled Posting !! message but then allows the posting to be journalled.

Also if there are unallocated disbs in hand when a disbs posting is selected for journaling, a warning message is given.

Deposit Interest Calculator
Modified 'All Files for Client' option to check ALL files (ie. deadened etc).
'One File' option modified to allow deposit interest calc on closed files (warning only given).

Purchase Ledger Cheques
General Posting – P/L Expenses – Pay Cheques
Allows duplicate cheque numbers for manual cheques (eg. use 99999 for direct debit payments)

The Client Name field on P/L Remittance Advice layout concatenates "P/L " with the actual number of the P/L a/c but now includes a space. This looks better if P/L a/c numbers are actually text names.

Not Allocated Items Report
Reports –File Based –(order) –Not Allocated Items
Modified the reports to include the % part allocated transactions as well.
OMS/Enterprise version modified to show office balance on client header line.
Modified to include 503/703 journalled disbs/expenses

Open Files Reports
Reports -File Based -FE2 order -Open Files
Existing report modified to show Quality Control flag (last column on report)

New report (needs to be added to menus if required)
LAW-RPRT2-OPEN-QF
As above but includes QC flag parameter to be set on running the report.