

Solledger Change Log

1.8.13 (2019-09-03)

- * Fixed error when creating local backups
- * Search dialog columns are now sized better, and the search dialog can be resized

1.8.13 (2019-02-03)

- * Updates so that we are MTD compliant for VAT returns

1.7.55 (2018-06-07)

- * Update for integrations to allow searching for matters on description2 field as well as code

1.7.54 (skipped)

- * Update that did not make release

1.7.53 (2018-04-04)

- * Client matter searching now includes the matter / client code when selecting matches

1.7.52 (2018-04-04)

- * Added search button to find the matter / nominal / supplier when posting
- * When searching clients, matters, nominals and suppliers the search functionality allows you to search for contains within and blank searches return a list of entries

1.7.51 (2018-03-06)

- * Fix version bug

1.7.50 (2017-12-04)

- * Client specific change

1.7.49 (2017-11-28)

- * Update PostgreSQL version compatibility, now compatible with PostgreSQL version 9.6

1.7.48 (2017-07-25)

* Fix version number

1.7.47 (2017-07-25)

* Update backup libraries

1.7.46 (2017-02-22)

* Filter field applies to print outs for transaction panels

1.7.45 (2016-05-04)

* VAT report can be done by date range
* Clients can be searched by National Insurance Number

1.7.44 (2016-03-22)

* Profit and Loss report can be done by date range

1.7.43 (2016-03-04)

* Field size issue for certain screens

1.7.42 (2016-03-03)

* Verified compatibility for PostgreSQL 9.5

1.7.41 (2016-01-19)

* Customer specific update

1.7.40 (2015-05-20)

* Fix to make trial balance summaries report faster

1.7.39 (2015-04-19)

* Updated to work with PostgreSQL 9.4

1.7.38 (2014-05-19)

* Fixed report save as options so that Trial Balance and Summaries reports can be saved as excel spreadsheets

1.7.37 (2014-05-13)

* Fixed report filters table so that multiple values carry through to the reporting engine

1.7.36 (2014-03-04)

* Updated import matter routine to be compatible with latest RMS Case Manager for Personal Injury

1.7.35 (2014-01-22)

* Fixed Accounts Summary / Trial Balance to work on older database versions

1.7.34 (2014-01-13)

* Added B.F. Date filter for Accounts Summary Report, optimise up Summaries report queries

1.7.33 (2013-12-11)

* Add Review category to Matter Status

1.7.32 (2013-12-11)

* Add Write Off category to Matter Status

1.7.31 (2013-12-05)

* Account Summary report update to always show a last activity date

1.7.30 (2013-10-18)

* Backup procedure fix

1.7.24 (2013-05-01)

* Removed months limitation for importing personal injury matters from MonkeyCase

1.7.23 (2013-02-18)

* Fix for bug in branch fields

1.7.22 (2013-02-14)

* Fixed nominal branch issue

* Added more informative potential error messages during login

1.7.21 (2013-01-17)

* Size fix when creating new matters / clients - for users that have large size
DPI settings

1.7.20 (2013-01-17)

* Size fix when creating new matters / clients

1.7.19 (2013-01-10)

* Cheques automatically set to not scale when printing by default
* Cheque units in uppercase

1.7.18 (2013-01-10)

* Updated library dependencies

1.7.17 (2013-01-09)

* Bank Details Update can be done without increasing db version number as this
would stop previous versions working
* Error messages added to new Cheque Printing framework

1.7.16 (2013-01-09)

* Client Specific Changes

1.7.15 (2013-01-09)

* Client Specific Changes

1.7.14 (2013-01-09)

* Cheque Printing Updates
* Field changes to add ability to store bank details for clients
* Main Frame now has firm and year information
* database version update to 1.7

1.7.13 (2012-11-12)

* Ability to import Personal Injury matters from MonkeyCase - Case Management
System.

1.7.12 (2012-08-21)

* Fix for focus issues with Java Runtime Environment 7 and Windows Look and
Feel.

1.7.11 (2012-04-27)

* Very minor update to a custom report for one of our clients. This update will not affect 99% of users.

1.7.10 (2012-03-14)

* Apache POI library update to resolve saving reports to file issue

1.7.9 (2012-02-22)

* Fix for Individual Matter Time Records Report

1.7.8 (2012-02-17)

* Backup and Restore Tools are now automatically installed, the option to not install the Backup Tools is available in the installer when choosing a custom install

1.7.7 (2012-02-16)

* Fix for report printing issues in 1.7.6

1.7.6 (2012-02-15)

* Move to an improved installer called Advanced Installer, this allows domain wide deployments amongst other improvements.

*** This upgrade will not uninstall old installations and so the previous installation needs to be uninstalled manually. ***

1.7.5 (2011-11-22)

* Updated all reports to Jasper Reports 4.1.1
* Aged Debtor report now contains two types, days or months
* Aged Debtor report can now exclude periods
* Aged Debtor report can now sort by period

1.7.4 (2011-11-10)

* Updated to PostgreSQL Client 9.1
* Updated login process for data hosting users

1.7.3 (2011-03-20)

* Updated to PostgreSQL Client 8.

1.7.2 (2011-01-20)

* Added various improvements to the 'Profit & Loss and Balance Sheet' report
* Fixed some problems with automatic narrative suggestions when posting

- * Fixed an incompatibility with older versions of Java
- * Other internal changes

1.7.1 (2010-12-02)

- * Fixed new clients not saving correctly

1.7.0 (2010-11-30)

- * Added ability to print account search results
- * Added a balance column to the supplier search screen
- * Added option to change set/unset read-only flag on databases
- * Added account code and alpha range options to Bills Book reports
- * Improved reconciliation behavior between year-ends. Individual old items are now shown from the previous year. This requires an update to the latest database version
- * Improved support for editing fixed accounts
- * Fixed reconciliation sessions with no activity not printing
- * Internal changes

1.6.25 (2010-11-09)

- * Improved database update mechanism in preparation for upcoming updates
- * Internal changes

1.6.24 (2010-11-05)

- * Added support for editing fixed accounts
- * Added support for importing cases from Monkey Case

1.6.23 (2010-10-26)

- * Added grand totals to 'Time Audit Trail' report
- * Added WIP Limit to matter description on individual reports
- * Fixed missing overhead values on 'Time Management Report'
- * Improved layout of some fields for OSX

1.6.22 (2010-07-29)

- * Added option to use hours input for time recording
- * Internal changes

1.6.21 (2010-07-13)

- * Internal changes

1.6.20 (2010-04-27)

- * Added 'As at date' parameter to 'Trial Balance' and 'Management Trial Balance' reports
- * Added new version notifications
- * Added date of birth field for clients

1.6.19 (2010-03-29)

- * Fixed further problems with reports not saving correctly
- * Internal changes

1.6.18 (2010-03-08)

- * Fixed behaviour of auto-completion in narrative fields
- * Fixed reports not saving correctly to .xls format

1.6.17 (2010-01-15)

- * Added branch column to the 'Audit Trail' report
- * Added an option to the 'Revenue and Expenditure' report to show a breakdown for each total
- * Fixed logic for 'VAT Transactions' report

1.6.16 (2010-01-12)

- * Internal changes

1.6.15 (2010-01-04)

- * Added batch range and branch options to the 'Profit & Loss and Balance Sheet' report
- * Other cosmetic changes

1.6.14 (2009-11-03)

- * Fixed time recording mode not appearing on certain PC setups
- * Fixed blank passwords sometimes not being set correctly. Also added a confirmation dialog when setting a blank password
- * Fixed incorrect error message appearing when no database is selected from database list on first program use

1.6.13 (2009-10-22)

- * Added a screen in the 'Configuration' section to update the database

1.6.12 (2009-10-22)

- * Added a separate reporting screen for fee earners in time recording mode. This also requires a database update

1.6.11 (2009-09-21)

- * Added 'Client Labels' report for printing mailing labels

1.6.10 (2009-09-01)

- * Added system date field to the login screen

1.6.9 (2009-07-02)

- * Fixed several problems with posting overhead time

* Added option to select the default date when the program starts. Options are the previous system date (default) and today's date

1.6.8 (2009-06-04)

* Fixed problem which could cause incorrect balance calculations on ledger and reconciliation screens
* Fixed displayed database name not changing when passing database as a command line argument
* Fixed incorrect alignment on 'Audit Trail' report
* Added backup ability for MonkeyCase databases

1.6.7 (2009-05-21)

* Fixed broken branch filter options on some reports

1.6.6 (2009-05-20)

* Added ability to edit fee earner on matter time records
* Prevented time from being posted to close matters from saved sessions. Closed matters will now be reopened after confirmation is given by the user.
* Other internal changes

1.6.5 (2009-05-15)

* Internal changes

1.6.4 (2009-05-13)

* Added ability to delete individual time records on matters
* Changed manual matching behaviour on Fees and Purchase Ledgers to allow badly matched records to be fixed

1.6.3 (2009-05-05)

* Added measures to prevent errors caused by data hosting connections timing out
* Fixed incorrect results from text searches involving certain characters
* Other internal fixes

1.6.2 (2009-04-20)

* Fixed 'Account Transactions' report not printing when no records are found for the given account

1.6.1 (2009-04-06)

* Added 'Suppliers' report
* Added option to 'Trial Balance', 'Matter Summary' and 'Matter Time Summary' to only show accounts with activity or balances after a given date
* Added last activity date range option to 'Trial Balance', 'Matter Summary' and 'Matter Time Summary' reports
* Other internal changes

1.6.0 (2009-03-25)

* Improved display of current tasks in time recording mode

- * Added an optional list of recent clients in time recording mode
- * Added ability to connect to Monkey Case databases
- * Added separate non-zero office / client balance filters on trial balance
- * Added balance limit options for trial balance and summary reports
- * Fixed some labels on reconciliation report
- * Fixed narrative not wrapping on time recording reports
- * Fixed error message when searching for a time activity that exists but has no rates for the current fee earner
- * Other internal and cosmetic changes

1.5.20 (2009-03-04)

- * Fixed incorrect total display for time batches involving bills or write-offs
- * Other internal fixes

1.5.19 (2009-02-12)

- * Added option to show expanded contra information on ledger printouts
- * Added filtering options to fees ledger and purchase ledger panels
- * Added a matched balance field to fees ledger and purchase ledger panels
- * Added additional time recording options for viewing and posting saved sessions
- * Added a matter type analysis to the 'Time Audit Trail' report
- * Added a WIP balance figure to the 'Account Transactions' report
- * Fixed problem when posting credit notes in invoice batches
- * Fixed title on 'Time Management' report not showing when bills and write-offs have been apportioned
- * Other cosmetic changes

1.5.18 (2009-02-02)

- * Added warning messages when a matter's time balance becomes close to or exceeds the WIP limit
- * Added a WIP limit column to the 'Account Time Summary' report
- * Fixed some rare problems with 'Aged Debtors' and 'Aged Creditors' reports
- * Fixed some incorrect labels in the reports section
- * Other cosmetic changes

1.5.17 (2009-01-08)

- * Fixed problem where printing time records would not work under certain conditions

1.5.16 (2008-12-08)

- * Fixed problem in 'Aged Debtors' report where totals could be wrong when applying unmatched cash
- * Added an option to change report creation behaviour. This can be useful for users who get errors using the default method

1.5.15 (2008-10-16)

- * Improve layout of several dialogs under Linux and OSX

1.5.14 (2008-10-02)

- * Fixed several problems with transactions reports, including issues when saving to excel format
- * Fixed time activities being displayed incorrectly in configuration
- * Fixed bug which could result in cheque printer names not being saved correctly

1.5.13 (2008-07-31)

- * Added option to only show a particular reference on 'Archived Matters' report
- * Fixed problem with 'Zero balances' option on 'Accounts Summary' report

* Fixed login dialog layout problems with long database names

1.5.12 (2008-07-11)

* Fixed backups from old program versions not restoring
* Other internal fixes

1.5.11 (2008-07-10)

* Fixed incorrect calculation of last batch number on reconciliation screen which could cause printing errors
* Added 'Last activity' ordering option for 'Trial Balance & Summaries' reports
* Fixed alignment of totals on 'Accounts Summary' and 'Accounts Time Summary' reports

1.5.10 (2008-06-16)

* Fixed issue where some repeated values would not appear on the 'Open Items' reports
* Fixed issue where a warning dialog was not always shown when trying to leave a posting screen
* Several fixes and enhancements for backup and restore procedures
* Other internal and cosmetic changes

1.5.9 (2008-05-30)

* Fixed supplier purchase ledgers not printing

1.5.8 (2008-05-19)

* Fixed narrative text being truncated on ledger printouts. The text now splits over multiple lines
* Changed title on ledger printouts to always show last batch number
* Added designated deposit option to 'Account Transactions' report
* Added ability to change database via a startup argument
* Other internal fixes

1.5.7 (2008-05-09)

* Fixed issue with incorrect text positioning in Matter interest summary
* Changed title on trial balance report to show latest batch number when all batches are requested

1.5.6 (2008-04-24)

* Added a new 'Account type' option to the 'Account Transactions' report. This allows selection of All, Nominals only or Matters only when selecting a range of accounts in the Accounts Transactions report
* Fixed ordering on ledger report printouts to match the style chosen in the user preferences - i.e. If date ordering for transactions chosen then print out will also be in date order.

1.5.5 (2008-04-14)

* Fixed issue where 'Trial Balance' report would sometimes not show accounts with no transactions
* Fixed issue where ordering of results from text searches would sometimes be wrong
* Fixed broken buttons in the Settings dialog
* Added new customizer 'SeqSuggestCustomizer' which suggests sequential numeric numbers for matters. This is for users who used to type + to get the next sequential matter no. and is only applicable to users with strictly numerical matter numbering. Needs to be installed by us but can be done by e-mailing a backup to us. Contact Paul to organise.

* Other internal fixes

1.5.3 (2008-04-02)

* Allowed bill number to be edited on fees ledgers
* Fixed incorrect ordering of 'Bills Book' report when bill number order is selected

1.5.2 (2008-03-18)

* Added a branch option on search screens for matters, nominals and suppliers
* Added a branch selection option for invoice postings
* Added warning dialog when transferring a DD amount which exceeds client free funds
* Added a status message to the top of 'Account Transactions' reports
* Changed heading for journal postings to show whether the batch is an 'Office' or 'Client' batch
* Other internal fixes

1.5.1 (2008-03-10)

* Fixed a bug which could prevent non-fee earners from posting time records
* Corrected the titles on some reports

1.5.0 (2008-03-03)

* Added support for multiple different PostgreSQL versions
* Improved backup format to support different client and server versions
* Other internal fixes

1.4.27 (2008-02-25)

* Added contra column to 'Account Transactions' report
* Fixed changes to purchase ledgers sometimes not being saved
* Other internal and cosmetic changes

1.4.25 (2008-01-31)

* Added new purchase ledger reports: 'Aged Creditors', 'Purchase Daybook & Cash Book', and 'Purchase Ledger Open Items'
* Fixed bug in balance updates when posting invoices

1.4.24 (2008-01-14)

* Added option to just print active matters on 'Account Transactions' report

1.4.23 (2008-01-03)

* Added start date column to 'Accounts Summary' and 'Time Summary' reports
* Fixed problems with Batch ID ordering on 'Bills Book' report

1.4.22 (2007-12-13)

* Fixed bug in cheque number suggestion when posting payments
* Other internal fixes

1.4.21 (2007-12-12)

* Fixed drill-down on ledgers sometimes not working
* Various small changes on ledger and reconciliation screens

1.4.20 (2007-12-06)

* Fixed 'VAT Transactions' report sometimes not showing all input amounts

1.4.19 (2007-12-04)

- * Added 'Archived Matters' report
- * Added options for printing 'Account Transactions' reports by code and alpha range
- * Fixed incorrect totals on 'Reconciliation' report when there were no unreconciled items
- * Fixed some minor problems on nominal ledger and reconciliation screens
- * Other internal fixes

1.4.18 (2007-11-27)

- * Altered appropriate reports to show extra narratives
- * Fixed title on 'Bills Book' report sometimes showing strange batch or date ranges

1.4.17 (2007-11-13)

- * Allowed columns to be resized on ledgers
- * Other internal changes

1.4.16 (2007-10-17)

- * Fixed bug where data would not be saved to the database after deleting an account

1.4.15 (2007-10-10)

- * Added option to display ledgers in date order
- * Allowed posting of unbilled fees in costs transfer batches
- * Other internal changes

1.4.13 (2007-10-05)

- * Fixed incorrect display of cheques with multiple analyses on 'Cheque Audit Trail' report
- * Improved backup method to warn users about failed backups

1.4.11 (2007-10-04)

- * Added record totals to some reports
- * Fixed bug where report save dialog would not open on some systems

1.4.9 (2007-09-26)

- * Allowed cheques to be posted with no analyses
- * Improved memory usage when creating reports
- * Other internal changes

1.4.8 (2007-09-24)

- * Added Dr / Cr display to 'Audit Trail' report
- * Fixed 'Transfer balances' option on 'Accounts Summary' report

1.4.6 (2007-09-19)

- * Fixed some bugs in 'Revenue and Expenditure' report
- * Other internal and cosmetic changes

1.4.5 (2007-09-18)

- * Fixed problems with 'Bills Book' report when no date range was specified

1.4.4 (2007-09-14)

- * Fixed bug in 'Accounts Summary' report
- * Improved performance of 'Trial Balance' report
- * Fixed bug in 'Time Summary' report where totals were sometimes incorrect
- * Fixed problems with 'Time Management' report

1.4.3 (2007-09-13)

- * Internal fixes

1.4.2 (2007-09-10)

- * Fixed bug in matter text search

1.4.1 (2007-09-03)

- * Added suggestion / completion of amounts when posting payments for unpaid disbursements and invoices
- * Added ability to post unbilled fees
- * Fixed bug where next invoice number suggestion would sometimes not work