
TRIALWORKS VERSION 11.1

TrialWorks Version 11 announces an updated look packed full of new features

WHAT'S NEW

TRIALWORKS VIEW

The TrialWorks View adds 31 color options and versatility to the TrialWorks Tab Structure. Users can now place tabs in their own custom order while choosing to show or hide tabs they do not need to access. If font size has been an issue, users can choose to Normal, Large and Extra-Large text size.

A New overall redesign update includes a cleaner look from the Home Screen to each detail window. Updated to a new minimum resolution of 1366x768 and 100% text size to accommodate widescreen monitors

QUICK ACCESS FIELDS

A New Layout to the Case List Drop-down now provides the most requested field info. Individual fields are available from the Clients, Other Parties, Insurance, Caption, Case Info, and Docket Date Info. Choose from 100 fields to always have in view. The Long Note fields under the Case Name now shows you choices from the Caption, Case Info, Clients or Other Parties. Choices include Case Quicknote, Last Negotiation Note, Case Facts and many more.

SMS TEXT MESSAGING

Text any contact in TrialWorks sending canned SMS Responses. Included in TrialWorks Maintenance, verify phone number carriers through the TrialWorks SMS Service. Messages no longer have to be sent from your personal cell phone. Messages are automatically filed when sent on the TrialWorks Email Tab, and replies appear in the User's Outlook Inbox. Any cellphone in TrialWorks prompts a Send Message menu whether in the Intake Cases Manager or TrialWorks Active cases.

TWSEARCH

Updated TWSearch Service now included with Version 11 Installs. Included in TrialWorks Maintenance, Users can search for any document, email or note in the TrialWorks Database. Even attachments to Email appear in results. Create your own Reading List when working on a project. New Desktop icon for TWSearch gives immediate access to search results. Installation for TWSearch has system software and hardware requirements and is a separate installation.

WEB INTAKE

Included in TrialWorks Maintenance, a web interface allows you to take the TrialWorks Intake Wizard with you and your potential client. Available using cellular service or wireless internet and accessible from any web browser. Email your client any field that still needs completing. The email received has a hyperlink to a website to complete the missing info. (Requires TWApp Installation)

TrialWorks LLC

Tel 305.357.6500
Fax 305.357.6499

1550 Madruga Ave, Ste 508
Coral Gables, FL 33146

<http://www.trialworks.com>
training@trialworks.com



UDF WEB DESIGNER

Included in TrialWorks Maintenance, the UDF Web Designer makes the creation of the User Defined Forms easier. Drag and drop and field placements allows a UDF to be created in half the time from before. (Requires TWApp installation)

FAX

Use any online fax company. Add the Fax domain to Global Settings and choosing Fax from the Home Ribbon will automatically format the Recipients Fax number using your chosen service.

FINANCE AND FUNDING

New option under Current Case Ribbon to request advanced plaintiff funding and financing advanced client costs.

FILEIT

A complete redesign of the application used to file documents into TrialWorks. Combined the features to file ALL documents to TrialWorks and coding them for Tab, Doc Category, Author, Party or Date. Users can modify and save their layout.

EMAIL TEMPLATES

Create Email Templates to automate sending emails from TrialWorks. Create case status emails to update your clients.

STAMPS.COM INTEGRATION

New custom integration providing postage from letters to packages, including certified mail handling fees. Add your postage directly to the TrialWorks Cost tab.

IMPROVEMENTS

ADDRESS BOOK

Redesign of Address Book Window. Search includes First Name, Last Name, Company, Email Address, Work number, Home number, Fax number, Cell number, Social Security Number, and Address. Add a filter to each column to limit viewable results. Choose Contact Type or Clear to view all types. Add Selected Contact to the current case

BOOKMARKIT

Updated to include the latest Bookmarks for ease of Template creation.

CALL LOG

Redesign of Call Log includes removal of Call Log List (added to Call Log Manager). Shows extension in phone number field. New Completed checkbox to designate the call has been completed.



CALL LOG MANAGER

A New Centralized Call Log Manager available on the Home Ribbon now shows all Calls logged in a single case or all cases. Opens to current case filter. Use the Call Log Manager to filter by Caller and keep abreast of all contact calls while on a single call.

CASE INFO

Create new note to Notes Tab when changing Status or Sub-Status

CASE SEARCH

Add additional options to search for a case. Includes Case Name, Acct #, File #, JCNo, Master Client, Client Party Name, Client First and Last Name, Client Company, Client Social Security, Client Email and Date of Accident, Contact First Last and Company Name, Contact Social Security, Contact email, Contact Phone Home Mobile and Fax Numbers, Caption Case/Index #, Insurance Claim and Policy numbers, Other Party Legal Description and Property Address. Item matched appear in the Match column.

CHAT

Show Users common name instead of Login name

CLIENTS

You now have immediate access to your client's cell phone number on tab

CONTACTS

Redesign Contacts Detail. Add a section for Communications (includes Correspondence, Calls, Emails, Depositions, Medical, and Subpoena). Redesign Additional Tab to include new Experts section with multiple documents links (CV, Jury Verdict Report, Transcript, and Breakdown), the Additional Email and Website. Cases where Contacts Appears tab showing a case list. Call Log button opens a Call entry form. History shows the previous version before changes made to the current contact record.

Redesign of Contacts Detail includes the simplification of the Contacts Type drop-down. Options include a checkbox to indicate a Global Type or Contact Type is shows as Case-Specific (unchecked). Zip Code auto-populates City and State. Copy to Clipboard option for Address or Full Contact that includes telephone numbers and address.

Add Direct Dial to Contact Preview

Update pre-populated list for Prefix (Honorable to The Honorable; removed period from Miss)

Contacts Search to include first name and last name and SaveAs

CUSTOM REPORT WRITER

The redesign includes an updated name to Report Writer. Window to Edit Queries opens maximized. Generate Option to Export All Queries to Excel.



DAMAGES/PHOTOS

Update Tab to Datasheet (list) view to enable sorting and filtering

DASHBOARD

Create new views for ease of Dashboard creation (UDQCaption, UDQOtherParties, UDQContacts, UDQCaseContacts)

DEPOSITION

The deponent field was changed to a Contact record in 10.9. Add option to choose from existing contact using Address Book

DOCKET

Redesign Add to Docket. Consolidate Auto Days, and Business Days into Date Calculator. Date Calculator form appears after clicking on Date Picker in the Date field. Remove Auto Calculate Tickler Days from Date above, Auto Calculate Tickler and Calendar button

DOCUMENT DETAIL WINDOWS

Updates to all Detail Windows includes a better layout with easier access to additional fields. A broader view of Template names (155 characters) makes choosing the correct for easier for document generation. Adding a new section called Extra Info now provides additional mailing and handling options. Look for changes in the Ancillary (Miscellaneous), Appeals, Correspondence, Deposition, Discovery, Medical, Memo (Documents), Hearings (Motions), Pleadings, Subpoena, and Witness Interview (Experts)

DOCUSIGN

Added to all document generation tabs (Ancillary (Miscellaneous), Appeals, Correspondence, Deposition, Discovery, Medical, Memo (Documents), Hearings (Motions), Pleadings, Subpoena, and Witness Interview (Experts)

Using Send Via DocuSign automates a DocuSign entry added to Delivery Info section

EMAIL

Add quick filter to Email Tab to show SMS messages or Emails

Add Clients Tab (Misc. Documents and Contract) to Email Multiple Documents

FAST TRACK

When Enforce Assigned to is turned on for the Docket, and the user was applying a Fast Track that did not have Assigned To populated, the user is prompted to Edit Fast Track when applying.



GLOBAL SETTINGS

Other Settings – Timekeeper. Add option for Free Billable Hours

Other Settings – Enable IM separated from Case List Refresh

Addins (2) – Stamps.com login for Master Account (also requires User Defaults Stamps.com username and password).

HISTORY

Include Clients Misc. Documents and Contract

INTAKE CASES MANAGER

Add Medical as Option for Intake Documents

Intake filters include self-building entries for Case Status.

NEGOTIATIONS

A redesigned layout provides pertinent information at your fingertips in the order you need. Settlement Calculator button added to Button Bar.

OUTLOOK ADDIN

High-Resolution compatibility. Users can pull down (height) entry form to enlarge the window to click File to TrialWorks.

Rename Redemption.dll to TWSafe.dll

RIBBON TOOLBAR UPDATES

Home Ribbon - Create New menu to centralize creating new forms of communication. Includes Call Log, Chat, Docket, Email, Fax, Mailing Wizard, Notes, and Time Entry. Create a new Intake or Case.

Home Ribbon - Consolidate Managers group to include Intake, Calls, and Timekeeper

Current Case Ribbon - Add Dial and Send Message to Cell number in Quick Contact Info

SECURITY

Form level Security – Address Book, Add to Docket, Call Log, Contacts Detail, Time Entry and Timekeeper Detail, SMS

Field level Security – All fields in Address Book, Add to Docket, Cal Log, Contacts Detail, Time Entry, Timekeeper Detail, SMS, and Finance Funding from Current Case Ribbon.

SETTINGS

Rename Add/Remove Tabs to Tab Settings. Add options for Add/Remove Tabs and Tab Colors

SMS Quickfill Library created to add standard text when sending SMS Messages.



TEMPLATES

Modify design of Edit Templates window to enable minimize/maximize, provide the ability to filter and sort.
Email Templates added to Intake Cases

TIMEKEEPER

Redesign Time Entry form to remove Time Entry list (available in Timekeeper Manager)

TRIAL MATERIALS

Update Tab to Datasheet view enabling sorting and filtering

TRIALWORKS

Tab names updated from Case History to History; Case Retainer Info to Case Info; Legal Discovery to Discovery and Case Summary to Summary

Update the right-click context menu to Switch Case by File #, Sort Case List – Alphabetically, Sort Case List – File #, Sort Case List – Most Recent Cases, Zoom, Cut, Copy, Paste.

Update TWapl Launcher to prompt on first time load Always enabling the Outlook and Office Addins.
Update Logos to new TrialWorks LLC Logo (TrialWorks, Outlook Addin, Office Addin, and FileIT)
Case creation in TrialWorks Demo mode increased to 15 cases (was 6).

USER DEFAULT VALUES

Add Email templates to the Templates Tab for default selection.
Stamps.com Username and Password (use for single account or individual accounts on Master)

ERRORS

ANCILLARY

Can Not choose Client or Other Party for document assembly
Unable to Filter Document Category

APPEALS

Correct creating document prevented hyperlink from being attached

BILLING RATES

When assigning billing rates to Master Client required a case to have the Master Client Assigned

BOOKMARKS

Correct bookmarks not populating: Division and Institution
Correct spelling in AllAttysGroupNum on Bookmark list
Added StatuaryInterest, DateAmountPreviouslyPaid, SettledInterestAmountBalance



CALL LOG

Opened from TAPI Call prompt opened with ContactsID instead of Caller Name
Emailing Call Log caused error when emailing second call log entry

CAPTION

Middle Initial missing when inserting contact in Judge field

CASE INFO

Closing Invitees pick window caused TrialWorks to shut down
Opening Invitees pick window showed blank details
Switching to Case Info shows Case Name highlighted
Fix Drop-down on Referral added the new value to the list but did not replace the old value
Fix Drop-down on Liability and Sub-liability replaced the value in the current case only

CLIENTS

Client Image only holds 1 image
Party Name does not include Middle Initial or Company Name when adding an existing contact
County field not added to Clients Tab for cases pushed from Intake

CONTACTS

Contacts Tab did not resize when opened.
Opening the Contact Detail of a contact with no Global Type caused TrialWorks to shut down

CORRESPONDENCE

Design inconsistency in name document Category from Doc Category

COSTS

Fix Drop-down in account did not replace the old value

CUSTOM REPORT WRITER

Change format for Custom Report Writer and Dashboard too Excel 97-2003 10155452

DASHBOARD

Correct error where Dashboard showed all views when limited to My Views Only
Dashboard Views with Contacts failed to open the Contact Detail
Printing from Dashboard caused the text to appear incorrectly.
Dashboard Refresh did not add new cases

DEPOSITION

Cannot choose Client or Other Party for document assembly



DISCOVERY

Rename Reports button to drop Legal

DOCKET

Subject line in Outlook Calendar was blank when Case File No. was blank
Status Note Code not added from Completed Fast Track Docket entry.
Prompting for subsequent Fast Track item failed if date completed is manually entered

E-MAIL

E-mail fails silently when an attachment too large is attached.
Correct error in Email Multiple documents where not all More Links were showing
Email opened with Blank body
Remove Custom fields when printing Email

FAX

Fax fails silently when an attachment too large is attached.
Using Send Efax and choosing multiple documents created the fax email without showing all attachments

FILEIT

A Received date of 1/1/1900 was added if field was left blank
Files containing a “#” in the name could not be moved into More Link
Dragging multiple documents from Outlook to FileIT with the same name, overwrote existing link instead of creating a new one

HISTORY

Filter Drop-down by Tab shows original Tab name only
Dates for Damages Tab not showing on Case History
Tab Reference for Medical Tab to Medical

INTAKE CASES MANAGER

Correct error where Blank Intake Cases were created after adding a Referral contact
Add logic when opening prior Intakes pushed to TrialWorks caused error with no Injured Party
County was dropped from Clients when pushed from Intake
Correct creating document prevented hyperlink from being attached

INVESTIGATION

Error sorting/filtering Police Precinct Field

LIENS

Hyperlink click caused document to open twice



NEW CASE WIZARD

Correct DOD and County Contact fields missing when existing contact added to Contacts fields

NOTES

Fix drop-down on Topics Category
New Note created from Ribbon had space

OTHER PARTY

Party Name does not include Middle Initial or Company Name when adding an existing contact
Insert Existing Contact caused the Date of Death and County field to be dropped from contact

OUTLOOK ADDIN

Opening an undeliverable message resulted in text appearing in Chinese characters

OFFICE ADDIN

Using Save As in TrialWorks on a document originally saved in TrialWorks broke the existing link

REPORTS

Fast Track Report generated with minimal printer margins
Time and Expense Report repeatedly had the same Invoice #
Pending Cases by Jurisdiction caused MSAccess error
Docket Report by Activity Code not generating correctly
Medical Damages Summary Report not sorting by Time
Statute of Limitations Report (Not Filed) showed cases with SOL Complied

SEARCH

Add support for Tab and Author filters for Email Searching

SECURITY

Active Cases Report security module not working
Allowed all Reports to be viewed

SETTLEMENT INFO

Spelling Error in "All Clients" when Client Settlements are enabled

SUBPOENA

Correct error when sorting TO field on Subpoena Tab

TEMPLATES

Template previously used not showing in Detail Windows



TRANSACTION LOG

Transaction Log shows Note Added from Wrong Case
New Case created from New Case Wizard was not logging Case Name

TIMEKEEPER

Billing rate is ignored when using automated timekeeping
Correct error where Calendar date picker appeared to be already activated
Timekeeper window was not prompting from FileIT Send Email

TIMEKEEPER MANAGER

Manager window is blank when author name has an apostrophe
Editing a time entry showed the calendar and checkbox for billable already depressed

TEMPLATE AND TEMPLATE PACKAGE

Template is not showing correctly when document detail window opened and caused the user to manually choose the template in Template Package

TRIALWORKS

Current TWUsers Report missing in Admin Mode
Case Name will not display when outside set case filters
Office 2016 Click-to-Run (Builds 1707 and 1708) caused reattach error
Opening TrialWorks on Server 2012 and higher caused the icon on the taskbar to show Access icon. User should Pin to Start the TWAppl.exe shortcut on Desktop

USER DEFAULTS

Remove POS Service option

USER DEFINED FORMS

Dates and Drop-downs cut off at large text size and Resolution (1920x1080 and Text Size 125%)

WITNESS INTERVIEW

Documents are saved with names instead of DocID number

