

Juris® 3.1 and Juris Suite 3.1 Software Release Notes

Before you install

Be sure to do the following before installing the Juris® 3.1 and Juris Suite 3.1 release:

- If you have enabled ClientPay Online Payments, you will need to **Get ClientPay Receipts** within Cash Receipts and grab the latest payments and post the batch(es). After posting the cash receipt batch(es) from the online payments, Refresh All Balances (**Billing->Online Payments**) before updating to Juris® 3.1.

Note

There is a change in the links generated for Online Payments. Contact support after updating to 3.1 for assistance on running a utility that will update existing links. This must be performed immediately after updating.

- Close Juris and all open applications on your computer.
- Perform a **complete backup** of your data files and documents used in the Juris software.

Note

Due to the change in the code platform for Juris, object type note cards that have already been added to Vendors, Timekeepers, Chart of Accounts, Clients, Matters, Users or Timekeepers in versions prior to 2.7 will not open after updating to 3.1. The Note Cards Migration Utility is installed with the Juris Administrative Utilities can convert object note cards into formats that Juris can open. All text type note cards are unaffected by the update to 3.1 and can be viewed in Juris. It is only necessary to run this utility if there are note cards that have objects, such as Word documents or Excel files, inserted on them.

What's new in this release (version 3.1)

The following features and enhancements are new in Juris 3.1 and Juris Suite 3.1:

ClientPay Trust Integration

Juris now allows online trust payments through ClientPay™. To integrate online payments, Juris requires the account key for a ClientPay merchant account and a PIN. Those are provided by ClientPay and will be different if also using ClientPay Online Payments for credit card payments to invoices.

Retention of Date Selection for Editing Transactions

Options for date selection when editing transactions will be retained per user. Examples using Unpost Bills, edits via prebill edit, time and expense adjustments.

Juris Suite Client Installation

When Juris Suite Client is installed on a machine that does not have Juris Core, the installation will now allow browsing for license file and removing the need to all install Juris License Manager.

ClientPay Payment Page

Added Client Code / Matter Code to the ClientPay Payment page.

New with prior releases

ClientPay Integration

Juris now allows online trust payments through ClientPay™. To integrate online payments, Juris requires the account key for a ClientPay merchant account and a PIN.

Email Template

Bills sent by email now have a customizable template. The email template can contain a link to pay the bill using ClientPay .

Juris Suite Reporting

Over 90 reports have been added to the JurisSuite Reporting module. These reports were designed to have more selections and options to easily retrieve the specific information needed by your firm. A new folder structure is in place to better organize the 1160+ reports available.

Microsoft Windows Server 2019 Support

Microsoft Windows Server 2019 is now supported with both Juris and Juris Suite.

Microsoft Office 2019 Support

Microsoft Office 2019 is now supported with Juris and Juris Suite.

New Quick Navigation Features

In Juris, the following options have been added to the Quick Navigation feature:

- **View Bill.** Allows users to search by bill number and see bill date and balance and view the archive bill.
- **Check Lookup.** Allows users to search by check number and to view the vouchers paid by the check.
- **Voucher Lookup.** Allows users to search by voucher number and view the voucher.
- **Cash Receipts.** Allows users to search by billing number or check number and see the cash receipt details.
- **Check Lookup.** Added the **Posted** field to show whether or not selected check is posted.

In addition, you can now access the Quick Navigation feature using the CTRL-Q keyboard shortcut. This shortcut only works when viewing the main Juris screen.

Check Design / Check Printing Enhancements

In Juris, you now have the ability to add the Memo (represents the voucher reference) to the check portion of a check design, which guarantees that it will print on checks for single check vouchers.

New Billing and Accounting Button

In Juris Suite, a **Billing and Accounting** button has been added, which allows you to launch the Juris application from Juris Suite without going through the log in process.

Code Platform Migration

Juris has been migrated to a new Microsoft .NET code platform.

Beta Help Link Removed

The Online Beta Help link has been removed from both Juris and Juris Suite, and both applications now have links to the new online help. In addition, the Juris help file is now web-based.

Expense Attachment Feature

An Expense Attachment feature has been added to both applications which provides expanded functionality, as described below.

Juris

- Attachments can now be added to expense entries in normal, direct, and adjustment batches. Attachment indicators on the batch screens allow you to see which entries have attachments.
- Files can now be added as attachments to expense entries in Edit Prebills.
- Files can now be added as attachments to expense distributions on Payment Vouchers.
- Attachment files can now be included when printing bills. The matter billing option can be set so that all attachments print with the bill or only for expense entries over a certain amount.
- In Client/Matter Inquiry, attachment indicators (icons) have been added to the Unbilled Expenses and Billed Expenses tabs to show you which entries have attachments. You can click an icon to view the corresponding attachments.
- Attachments that were originally added to expense entries in Juris Suite can now be viewed in Juris.

Juris Suite

- An attachment indicator column has been added to the grid view in My Expenses to show you which entries have attachments. You can click on the indicator (icon) to view the corresponding attachments.
- A count number has been added to the Attachment tab on an expense entry to indicate how many attachments are used by an expense entry.

- In Client/Matter Inquiry, attachment indicators (icons) have been added to the Unbilled Expenses and Billed Expenses tabs to show you which entries have attachments. You can click an icon to view the corresponding attachments.
- Attachments added to expense entries in Juris can be viewed on the corresponding entries in Juris Suite.

Printing Issue

Due to the change in the code platform from VB to .NET, it is possible that some differences in margins, spacing, and field placement may be noted on prebills, bills, and checks when printed. These variations are usually slight and can be fixed by making the appropriate adjustments to the bill and check designs being used. Prior to running large bill or check runs, it is recommended that small sample print runs of bills and checks be performed first to verify that the printed output meets expectations.

Addressed Issues

At publication time, the following client-reported Juris and Juris Suite issues have been fixed in the 3.1 release.

List of Addressed Issues in Juris/Juris Suite 3.1		
177558	Print Prebills - Shifting to the right causing the right side to be cut off.	7756024
195548	Select/Print Prebills - Printing all details for Trust Ledger History subsection when set to print from last bill.	
99117	Edit Prebills (Bill Designer) - Hours formatted as User Defined not showing correctly in Edit Prebills	7361795
172944	Edit Prebills - Cannot access closed stream opening prebill if fields have special characters.	7636504
182838	Select Prebills - Error selecting prebills on large databases. Out of Memory	7795090
44773	Post Bills/Trust - Not creating trust voucher when amount is <.99	6912052
191399	Print Prebills - Error printing if Fee Recap is not Grouped	7895740
191594	Select Prebills - Error when have consolidated matter set to flat fee or retainer and no fees present.	7891291
192087	Juris Suite Deployment Manager - FolderGroup_Save procedure not present on new Juris Suite databases - error deploying	7903596
192559	Archived Bill images - Large gaps when suppressing sections or lines and no data present.	7903733
186111	Vendor Inquiry - Not showing check number over 8 digits long.	7816097
191341	Reports - Cash Receipt Edit - Total deposit amount tripled after the exporting the	7889553

List of Addressed Issues in Juris/Juris Suite 3.1		
	report	
192932	Juris Suite - Reports - General Ledger Trial Balance- Not showing drop down	7900192
193064	Juris Suite Deployment - Favorites are getting removed during deployment	7916373
192083	Bank Reconciliation - G/L account not showing on reconciling entry	7905744
191403	Bank Reconciliation - Payee column is not updated correctly for the newly added Reconciliation entries	7892002
191452	Bank Reconciliation - GL balance is not refreshed after adding the new entry	7892002
191058	Bank Reconciliation - Taking a long time to export	7880902
44739	Quick Checks - default sort of entries on the batch screen is by vendor name instead of record number	6298782
46074	Payment Vouchers - batch sort by record number not sorting numerically	6538804
67345	Time Entry - Error naming batch using / and -	7366729
193566	Recurring Transactions - Valid past notifications are not displayed	7924683
191875	Quick Checks - Cannot use space bar to choose Manual check option	7916180
192082	Checks - Cannot adjust the column widths and could in 2.61	7905747
191874	Cash Receipts - Have to backspace over value to edit the amount.	7916181
191578	Inquiry - Inquiry Type - Grids cut off and cannot see full details	7916184
192297	Bank Reconciliation - Showing part of the month in the Entry Date for new entries	7916181
190446	Juris Suite- Prepaid Activity Report - showing non-prepaid ledger history items as Prepaid Unposted and amount of 0	
190539	Juris Suite Deployment Manager - Need to address deployment for firms with have older reports with same reportidgui.	

Known Issues

The issues described below currently exist in the applications and may be resolved in a future release.

Note

These issues *were not* introduced in the 3.1 release, but are ongoing defects from prior releases.

Juris

In some instances, in particular if the database is stored on an external hard drive or if the machine performance is slow and there is a high volume or time/expense records, the Database Revision Update may not complete the first time, and it may need to be run more than once.

The following table highlights all remaining known issues:

List of Known Issues in Juris 3.1	
196592	.NET - Cash Receipts - Not clearing Payer details when Remove Row
186590	.NET - Prebills - Sorting prebill number alphanumerically and needs to be numeric.
196587	.NET Transactions - Folder creation - Not placing batches in correct location
196226	.NET Reports - Error removing Range from Report Options InvalidArgument=Value of '0'
193862	.NET - Print Bills - Printing Master split when format set to suppress
193858	.NET - Spell Check - Not recognizing quote ' in some cases and stating misspelled.
193857	.NET - Spell Check - Not recognizing hyphen - within words and stating misspelled.
193551	.NET - Select/Prebill Print - Leading Zero is missing in Client code when printing prebill
193506	.NET- Quick Checks - For negative value- Invoice Balance and Amount Paid values are not displayed in Quick Check
193446	.NET - Bill Designer - Group Keep Together setting causing page break when no details
193420	Print Statements - Clear out entered values once statements been generated
193295	.NET Bill Formats - Transparency does not work when have fields on top of other fields
193187	JurisBX - Not pulling from notecard when associating the BX format
193184	.NET JurisBX - Error loading list of bill when greater than 500 bills
192384	.NET - Matters - Adding matters odd in the matter list
192050	.NET Bank Reconciliation - () on Negative amount versus - as in 2.61
191905	.NET - Print Bills - Spacing is off between prebill print and bill print

List of Known Issues in Juris 3.1	
191878	.NET Vouchers - Cannot see the full name of distribution GL account
191876	.NET - Find - Alt/N hotkey not putting focus in Named field
191794	Client/Matter Inquiry - Inquiry Type Fees - Billed Details - Amount shows the amount that was in place BEFORE discount
191553	.NET Print Statements - Client Code column heading is greyed out when Select by option is Consolidation Name OR Matter
191495	Bill Design - AR Statment throws error when group by - AR group header – Matter code.
190984	2.84+ - Juris Suite - Billing-Analysis of WIP and AR-Firm Accual AnalysisOnly showing first month when select First Day... or Last Day... parameters
189666	Archived Bills - Overlapping fields in fee section
187753	Cash Receipts - Error copying and pasting text from Reference Line on Other Tab
187742	Client Matter Inquiry - When listing the client only, ledger history details are condensed.
187516	Report Queues - Wiping out the month when print when change the printer, hence not printing correct month.
187514	Print Prebills - Cutting off and not printing correctly when Bill Number has value in When Zero
186811	Cash Activity - Overlapping lines when do multiple transactions (AR,PPD,Trust,Other)
186810	Bill Designer - Ñ ñ in label changes to ? on save
186113	Bill Designer - Missing Split Expenses field
186111	Vendor Inquiry - Not showing check number over 8 digits long.
186073	Matters - Not selecting correct billing address if have a billing address with blank name
186023	Matters - Not showing the first timekeeper on the list for Originating timekeeper value on Line 1
183869	Archived Bills - When format is not properly aligned, adjust when update so archived bill images will not be affected due to faulty format
183289	Prebill Print - Split matter code ,description are not displayed in prebill print when print from select prebill window
183232	Payment Voucher - Up arrow not taking user back up one level but back to base folder for current period

List of Known Issues in Juris 3.1	
182336	Payment vouchers - Error using \$0 on expense distributions
181389	Print Bills - Envelope not printing if have default printer set to PDF
181115	Vouchers - Error posting vouchers with expense distributions after updating from 2.61 to 2.8+
179998	JurisBX - Creating blank notecard for format that is not used.
179979	Journal Entries- Difficult to copy and paste into specific fields in transaction
178468	Select Prebills - SQL2019 - Need to lower compatibility of database when restore with lower version of SSMS to get prebills to select
178170	Client-Folders - Folders tree does not show folders in alphabetical order.
178146	Bill Designer - Add Billable 'flag' field to bill format to use in edit prebill
178123	Billing - Edit Prebills - Discount % field changes value when edit the discount amount
178045	Check Register Report - Showing reconciliation entries on the report when not checks.
177963	Transaction - Time /Expense Batch is in locked status when batch have 1 open and minimized
175766	Expense Attachments - Need to modify posting query for details for attachments
172852	Print Bill- Consolidated Bill stops printing due to how format is set with suppression
173661	Financial Statement Layouts - Cannot cancel out of Save As until enter code and name
175112	Trust Vouchers - Stating overdraft when not over the trust amount.
175130	Juris Database Revision - Erroring out updating a newly created database
166985	Close Accounting Year - Out of Memory Exception when closing accounting year
165962	Billing - Prebills/Bills - Showing payment since last bill in order of the ledger history. Ledger history actually shows the order things were done so can be confusing for does not go by date
165451	Quick Checks - Clicking X from Print screen does not cancel
165444	Bill Designer - Error when change from twips to inches and enter margin value
165177	Spell Check - double clicking suggested word doesn't insert the correction
164662	Juris/Juris Suite - Update Data synchronization between Juris and Juris Suite and within applications

List of Known Issues in Juris 3.1	
164475	Edit Prebills/Juris Suite - changing status of entry not on prebill to On Prebill after adding new time/expense entry if dated prior to today's date
164370	Edit Prebills - Cannot properly view prebill with lots of entries
164164	Checks/Quick Checks - Error printing checks or quick checks if invoice information is listed BEFORE invoice number on check layout
164004	Conflict - No results found screen going behind other screens hence seems locked up
164002	Client/Matter Inquiry - Viewing Archived bill missing tab on taskbar hence implies locked up if click off
163355	Sub Accounts - Retained Earnings account messes up if set Separator set a decimal/period
163314	Vouchers - Cannot remove voucher from check batch or void if has quotes " in Reference/Memo
162841	JurisBX - Cannot select multiple bills on Bills to Export form
130318	Juris - Journal Entries - Cannot post Reversing entries in closed year if no unposted batch exists in that period
103867	Billing - Payment showing multiple times in Itemized Payment Subsection if have the same date as bill.
103741	Matters - Error editing Originating/Billing Timekeeper when have open date of 01/01/1900.
85719	Time Entries - Issues sorting on Status column when have lots of batches.
67071	Bill Designer - Properties changing values when copy from one section and paste to another.
67070	Bill Designer - Not properly showing how number field is formatted for debit and credit.
66500	Select Prebills - Error Cannot access a closed Stream selecting prebills (Memory errors).
66475	C1NumericEditEx - Issue with typing over fields and INSERT and DEL functions.
66313	Time Entries - Duplicate Narrative showing up in multiple time entries.
65450	Import Time Entry - Not importing amount properly when formatted with \$.
65187	Bill Designer - Retaining prior format name when import more than one format and issue with Cancel as result.
64786	Unpost Bills - Cannot unpost bill if have negative/positive fees to net to zero.

List of Known Issues in Juris 3.1	
64740	Prebill - Prebill Change Log - Change date format
46092	Bank Reconciliation - Does not show chosen G/L account on Reconcile Entries
44653	Juris Spreadsheets - Amount fields are not immediately editable when you tab into them. Temporary Resolution: Double-click or backspace over cell to allow editing.
44655	Unpost Bills – Read-only fields seem to allow editing on screen, although no changes are saved.
44656	Expense Entries - Normal Batch - error occurs after selecting matters with certain locked status from the client/matter lookup.
44659	Juris Validation Export - Splash screen has black bands superimposed on text.
44662	Juris Management Console - Database options print when detaching a database.
44663	Juris Management Console - Error occurs running Verify.
44664	Juris Management Console - Prints Verify options when clicking Next.
44665	Juris Management Console - Prints the Shrink Database options after hitting next.
44666	Juris Management Console - Shrink - Error occurs when shrinking database. Temporary Resolution: Perform action using SQL Server Management Studio.
44686	Juris Management Console - Database-Devices - Cannot delete any Backup Devices. Temporary Resolution: Delete device using SQL Server Management Studio.
44667	Juris Management Console - ABA codes imported to the database do not appear in the tables.
44673	Print Bills – Some types of file attachments do not print.
45727	Payment Vouchers - Attachment is deleted when trying to undo a delete on an expense distribution form.
44679	Print Bills - The number of copies of the expense attachment files can be incorrect if the matter has multiple addresses and some addresses are selected not to print.
44677	Print Bills - Expense attachment files print for expense entries that are over the attachment limit if those expense entries aren't over the limit but are summarized.
44676	Cash Receipts Activity Report - Text can overlap the first entry if there are subsequent entries for AR and PPD.
45729	Quick Check - Payment Vouchers - An error occurs if user arrows up or exits a new voucher form when focus is on the invoice amount after change amount. Temporary Resolution: Tab out of the field before using the arrows.

List of Known Issues in Juris 3.1	
44693	Screen Settings - Text, buttons, and screens are cutoff when using larger DPI. Temporary Resolution: Change DPI to smaller settings.
44682	Print Bills - Attachments - Expense attachment files print for entries that are marked off or suppressed.
44694	Juris Bill Format Update Utility - An error occurs if user selects ellipses on Client or Matter lookup. Temporary Resolution: The codes can be entered manually by typing them.
44699	Expense Adjustments - Entries that are on a prebill cannot be deleted though an expense adjustment batch. Temporary Resolution: Entries can be deleted in Edit Prebills or in the expense adjustment batch, once prebill is deleted.
44702	Juris Management Console - Report displayed when function is complete is blank except for database names.
44712	JurisBX Utility - The utility must be in Juris\Bin directory to run. Temporary Resolution: A shortcut can be made on the user's desktop to run the utility so user does not have to locate it in the bin directory.
44718	Time/Expense Entries - F9 key is not duplicating the matter code from prior entry. Temporary Resolution: User can use the auto-duplicate feature to duplicate the client/matter codes.
44720	Reports - Cannot use keyboard to move through options on the report dialog box, for example, General Ledger Trial Balance.
44730	Log in - When a backup is required, user's flag is not cleared after trying to sign in.
44736	Bill Designer - Object reference error occurs when display mode is changed on the Fee/Expense Edit Box or the Expense Summary Detail section.
44740	Navigation - When in browser view, you must click on code in a window before you can start typing letters to navigate through the codes.
46036	Bill printing - Border options for a field do not print properly.
46046	Time Entries - The end of the date field accepts a period.
46076	Cash Receipts – The maximum amount of PPD/Trust/Other tab is limited to 9,999,999.99. Temporary Resolution: Break the amount up into separate entries.
46078	Close Accounting Year - Out of memory error can occur after closing multiple years in a row. Temporary Resolution: Close Juris after closing three years in a row, then sign in again and continue.
44744	Bill Designer/Bill Printing - Fields overlap if fields exist below the expense detail summary section when edit box used.

List of Known Issues in Juris 3.1	
	Temporary Resolution: The fields can be moved above to a position above the expense detail summary section.
44745	Payment Vouchers - Note field on expense distribution can sometimes be incorrectly updated when saving subsequent vouchers.
44750	Reports - Print Trailer Page option is not being retained for a user.
44754	Checks – An error occurs if there are two text type fields on the same line as repeating voucher detail fields.
44791	Client/Matter Inquiry – Unable to view archived bill if no fields appear on the Bill Format component.
44794	Permissions - Edit Prebills - Time entries may be deleted even though user does not have permission required to create adjustments or direct batches for time entries.
44703	Vendor Inquiry – Vouchers may load slowly when loading more than 3000 vouchers.
44801	Time Adjustments – Unable to find time entries when search by date and date of entry are the same as Through date and values in HH:MM:SS.
44803	Post Bills - Out of Balance OOB created with excess fees discount when entries have 0 hours billed.
44804	Reports - Billing Projection – Entering a cut-off date can clear the selected Billing Month.
44805	Reports - Report sorting is affected by CAPS versus no CAPS in Sort order field of timekeeper.
44806	Tables - Vendors - Unable to remove default G/L account.
44809	Timekeepers - Added timekeepers can exceed license by having Employee as User first.
44823	Notecard Utility - Error running notecard utility with large amounts of notecards.

Juris Suite

The following table highlights all remaining known issues:

List of Known Issues in Juris Suite 3.1	
179981	Juris Suite - Reports- Export from preview defaults name as Document -if run as Admin, default name will be name of report

List of Known Issues in Juris Suite 3.1	
178145	Juris Suite Reports- Report opens in Protected View when exported to excel
171075	Juris Suite - Time Sheet Edit List can show duplicates with custom grouping
169140	Juris Suite -Report- When use ellipse to select a date on a report date parameter, the default is June 2006 instead of Today's Date
166747	Juris Suite - Collections - Error searching by Client for specific Account Manager
165935	Juris Suite - Time/Expense Entry - Hot Key of Ctrl+N creates new row in grid but not a floating form
165616	Juris Suite - When using client/matter lookup on matter level, when enter client and then search, not pulling in selected client
164469	Juris Suite - Error when publish Time and Expense filters to Teams
130286	Juris Suite - Inquiry - Address timing/time out loading many trust details within Trust Ledger History Type
130270	Juris Suite - Budgeting - Error when right click and choose to Add Row in GL Budget
	In Client/Matter Inquiry for the Unbilled Expenses and Billed Expenses tabs, the new attachment indicator column cannot be removed from the layout.
67074	Juris Suite - Time Entry - Pausing timer transfers and resets when have user setting transfer time on save.
65451	Juris Suite - Import Time Entries - Not importing Amount if column formatted with \$.
65361	Juris Suite - Distributions - Will not reactivate once marked Inactive and then back to Active if the Next Run time has passed.
50913	Juris Suite - Report Designer - 2 Labels in ToolBox is confusing for two separate controls.
50282	Juris Suite - Retain the Custom selections in Client/Matter Lookup.