Software Information Bulletin # 53
What’s New in Needles 4.8

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1. Integration With Juris Billing Software.

Needles Version 4.8 features a new bidirectional interface with Juris billing software which facilitates the exchange of information between the two programs. You must be using either Juris Version 2.3sp1 OR 2.35sp1 in order to interface with Needles.

- Create a new client and matter in Juris when a new case is created in Needles using Juris Client Templates specified for each Needles case type. Select from four different numbering methods to be used when creating the clients and matters in Juris:

  - **Method 1** – The Needles Names ID will be utilized as the Juris Client Code. The Needles Case Number will be used as the Juris Matter Code.

  - **Method 2** – The Needles Case Number will be utilized as the Juris Client Code. The Matter Code will be 000000.

  - **Method 3** – The Juris Client and Matter Code will be assigned manually each time a new case is added to Needles. Choose whether to:
    1. Create multiple matters under one Client Code; or
    2. Create a new client code for each new matter.

  - **Method 4** – Utilize the auto numbering feature of Juris for assigning Client and Matter Codes. Needles will automatically detect that your Juris settings reflect that auto numbering is in use, and will only offer this option in the Needles Juris set up.

- New Juris users will want to use the “Transfer Clients To Juris” option to send open cases in Needles to Juris (utilizing the numbering method chosen) based on template choices made by case type.

- Existing Juris users will be able to manually link cases in Needles to existing Client Matters in Juris.
Set an option to add a case to Juris when the case is created in Needles.

Set an option to add a case to Juris when changing the case type of a case in Needles.

Bi-directional updates of Address and Fax number – Changing the information in Needles will update the information in Juris and vice versa.

Needles will also update Name, Phone and E-mail address information in Juris.

Select an option to use Juris for time tracking. This will utilize the Needles timecard entry feature to send time to Juris using Timekeepers, Tasks, Rates, and Activities from Juris without having to leave Needles.
Click on the Juris button on the toolbar (or on the menu) to open the Juris Client/Matter Inquiry screen for a case that is currently open or search for a different case. The Client/Matter Inquiry allows a user to review general information as well as information specific to fees, expenses, bills, receipts, client info and trust information for clients and matters in Juris. The system is capable of displaying this information for all matters for a particular client as well as showing the details for a specific matter.

See Section 3, Chapter 23 of the Needles manual for more information.

Wished For By: Suisman, Shapiro, Wool, Brennan, Gray & Greenberg; Abes Baumann, P.C.; Quatirmi Rafferty, P.C.; English, Lucas, Priest & Owsley; Franklin & Franklin PC; Caroselli, Beachler, McTiernan & Conboy, LLC; Hogan & Willig PLLC; Malapero & Prisco, LLP; Martin Kane Kuper LLC; Metzger, Wickersham, Knauss & Erb

2. Compatibility With Microsoft Vista.

Improved compatibility with Vista includes such items as:

- Needles installation will now account for Vista preferences.
- Needles will properly display in Vista

Wished For By: Needles Technical Support Department

The server and each computer must be running one of the following versions of Sybase in order to sync Outlook with Needles 4.8. If you try to setup syncing in Needles 4.8, you will not be able to access the Outlook tab unless you are running at least one of these minimum versions. If you are already setup and syncing but have an older version of Sybase installed, the syncing will continue to work, but you will not be able to access the Outlook tab to make any modifications.

* Verify you have one of these versions of Sybase installed PRIOR to converting the database to Needles 4.8.0 or trying to log into Needles 4.8.0 from the workstations.

Minimum Versions Required:
Sybase 7.0.4 (7.00.04.3541)
Sybase 8.0.3 (8.00.03.5444) or newer build
Sybase 9.0.2 (9.00.02.3375) or newer build
Sybase 10.0.1 (10.00.01.3764) or newer build
Sybase 11.0.1 (11.00.01.2052) or newer build

Patches to upgrade the build of Sybase within the version that you have installed can be downloaded from the Needles website at www.needles.com.

See Appendix I, Needles Outlook Integration Guide.

4. Integration With eLaw® Outlook Calendar Synchronization.

For those Needles users who currently use eLaw® Microsoft Outlook Calendar Synchronization to automatically pull appearance dates for their cases on eWatch, you can now link the calendar items to your Needles cases. You will also need to use the Needles Outlook Calendar sync to automatically transfer the items from Outlook to Needles.

See Section 3, Chapter 24: eLaw Interface.

Wished For By: The Law Offices of Melvin Marx, P.A.; Morelli Ratner PC; Isaacson, Schiowitz & Korson LLP; Duffy & Duffy; Burns & Harris
5. **E-mail Setting (MAPI or Outlook) Can Now Be Set Individually Using Staff Preferences.**

For firms who have a mixed E-mail environment, the choice for using MAPI or Outlook can now be selected for individual staff through staff preferences rather than being only a firm-wide (global) choice.

![Preferences for Cathy](image)

*See Section 2, Chapter 4 of the Needles manual for more information.*

_Wished For By: Hays & Associates, P.C.; Needles Technical Support Department_
6. **Send Needles Messages to E-Mail.**

Set an option to have your Needles Messages sent to your E-mail address. Specify the E-mail address and whether to send messages to E-mail when you are or are not logged into Needles.

![Preferences settings for Needles](image)

See Section 2, Chapter 4 of the Needles manual for more information.

**Wished For By:** Abraham, Watkins, Nichols, Sorrels & Friend; Rosner Law Offices PC; Chappell, Smith & Arden; Young & Husain, PLLC; Hal Waldman & Associates; Susan R. Green Law Offices; Truman Law Offices; Kellum Law Firm; Plichta, Alavi & Associates PC; Litster Injury Lawyers; Sheff Law Offices; Crumley Roberts LLP

7. **Send a Needles Message Directly From a Case.**

There is now a new option on the Message menu to **Send Needles Message From Case**. While in a case, selecting this option will open a message window with the Case Number and Client Name fields pre-populated with the information from that case. When you enter a name in the From field, the phone number populates with the first phone number in the system for that name. If that name is associated with another case, you will be prompted as to whether you wish to switch the association of the message to that case instead.
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See Section 5, Chapter 1 of the Needles manual for more information.

Wished For By: Riddle & Brantley, LLP; Begelman, Orlow & Melletz; Keller & Keller; Smart Law Office; Brecke Law Office; Law Offices of Larry King; William Mattar, P.C.; Law Offices of Gary Green; Wayne Wright Injury Lawyers; Malaise Law Firm PC; Crumley Roberts LLP; Patric Lester & Associates; Branton & Hall, PC; Meggesto, Crossett & Valerino, LLP; Farrin Law Office; Dolan & Dolan; Betras, Maruca, Kopp & Harshman LLC; Proner & Proner Law Firm; Maynard & Harris, Attorneys at Law, PLLC; Polinsky, Siegel & Polinsky LLC; Henson & Fuerst, P.A.; Needles Support Staff

8. New Keyboard Shortcuts Have Been Added.

You can now use keyboard shortcuts to Send a Message (<Ctrl> + <Shift> + M) and to Send a Needles Message From Case (<Alt> + <Shift> + M).

<table>
<thead>
<tr>
<th>Messages</th>
<th>Key Combination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Message…</td>
<td>&lt;Ctrl&gt;+Shift+M</td>
</tr>
<tr>
<td>Send Message From Case</td>
<td>&lt;Alt&gt;+Shift+M</td>
</tr>
<tr>
<td>View Messages…</td>
<td>&lt;Ctrl&gt;+M</td>
</tr>
<tr>
<td>Archived Messages</td>
<td></td>
</tr>
<tr>
<td>New Intake Sheet</td>
<td>&lt;Ctrl&gt;+I</td>
</tr>
<tr>
<td>View Intake Sheets</td>
<td></td>
</tr>
<tr>
<td>View Rejected Intake Sheets</td>
<td></td>
</tr>
<tr>
<td>E-mail Inbox</td>
<td></td>
</tr>
<tr>
<td>Send E-mail</td>
<td></td>
</tr>
<tr>
<td>Mass E-mail…</td>
<td></td>
</tr>
</tbody>
</table>

See Appendix A of the Needles manual for more information.

Wished For By: Duffy & Duffy; Bulman, Dunie, Burke & Feld Chtd.; Brecke Law Office; Weiss & Cohan PC
9. **New Report Features.**

When running some standard and user defined reports in Needles, the following features will now be available:

- On most reports that list the Case Number, double-clicking on a specific Case Number will take you to the Case tab of that case.
- The window will no longer automatically zoom to 75% and have the blue box frame by default.
- Clicking on a column heading will re-sort the report in ascending order by that column.

In addition, the following new features have been added to the Needles Report Writer:

- The following Database Functions have been added:
  - **sp_first_party_address( #casenum )** - displays the first party's default mailing address.
  - **sp_first_party_phone( #casenum )** - displays the first party's first phone number.
  - **sp_default_address( #name, #name_location )** - displays the name's default mailing address.
  - **sp_default_email( #name, #name_location )** - displays the name's default E-mail address.
  - **sp_business_phone( #name, #name_location )** - displays the name's business phone number.
  - **sp_fax_number( #name, #name_location )** - displays the name's fax number.
  - **sp_home_phone( #name, #name_location )** - displays the name's home phone number.
  - **sp_mobile_phone( #name, #name_location )** - displays the name's mobile phone number.
  - **sp_pager_number( #name, #name_location )** - displays the name's pager number.
  - **sp_top3_phones( #name, #name_location )** - displays the name's top three phone numbers.
  - **sp_party_cur_age( #name, #name_location )** - displays the name's current age.
  - **sp_party_doi-age( #name, #name_location )** - displays the name's age as of the Date of Incident (DOI) in the case.
Links connect the information in the selected tables. When adding more than one table to a report, the link between the two tables is automatically created for you unless there is more than one link that can be made. When more than one link can be made, a window will pop up displaying all available links from which you can select.
Right-clicking on a link now pops up a menu of three available ways to join the two tables.

- **Table 1 = Table 2** - This is the simple join described above where there is matching data in both tables and is used most often in Needles report writing.

- **Table 1 = Table 2** and rows from Table 1 that have no items in Table 2. This is also called a “left outer join”.

- **Table 1 = Table 2** and rows from Table 2 that have no items in Table 1. This is also called a “right outer join”.

Use the new Font button to select the font, font style, size and color.

In order to use the new feature of clicking on column headings to change the sort on a user-defined report, the name of the text label has to be the name of the
column + “_t”. Normally when a report is created, column headings have been created simultaneously and therefore there is no issue. However, when columns are added after the initial selection, the columns are not automatically added to the report and the column titles are not created. There is now a new feature that will allow the user to name/ rename a text label. When you select a text label and right-click, there is now a menu option “Rename Text Label”. It will open a window showing the original name of the text label, a place to enter a new label and a list of columns that do not currently have a text label associated with it. Simply select by double-clicking the column for your label and the proper text label will be created in the New Name field. This window will also appear when adding a new text label to a report.

See Section 6, Chapters 1 and 4 of the Needles manual for more information.
10. Changing Staff Assignment on Case Tab Will Now Prompt Whether to Also Effect Change on Manually Assigned Checklist Items.

Changing the staff assignment in any of the staff slots on the Case tab (whether you are making the change in one case or are using the update multiple cases feature to change it in many cases at one time) will now prompt whether to also effect that same staff change on any checklist items that were manually changed from the original staff.

See Section 3, Chapter 4 of the Needles manual for more information.

Wished For By: Needles Trainers

11. Ability to Search (Advanced Search) For Providers By Role And/Or Specialty And By Zip Code (or Other Address Criteria).

The Advanced Search button in previous versions of Needles has been renamed “Case Search”. A new button has been added to the Search screen next to the Case Search button called “Provider Search,” which allows for searches of Providers by their Role, Specialty, Zip Code or other Address criteria. For example, you can now easily search for all doctors who are expert witnesses with an orthopedic specialty in a specific city or state, or find court reporters in a certain city.

See Section 2, Chapter 9 of the Needles manual for more information.

Wished For By: Bulman, Dunie, Burke & Feld Chtd.; Law Offices of Dianne L Sawaya LLC; Azar & Schlehofer PC; Elk & Elk Co., L.P.A.; US Arbitration & Mediation; Errico Law Office;
12. **Add Party or Add Provider Buttons Only Display When Appropriate.**

When a search within a name field does not find a match, the appropriate Add Party/Add Provider buttons will display, not both.

![No Names Found](image.png)

*See Section 2, Chapter 9 of the Needles manual for more information.*

**Wished For By:** Bieber Firm of Richmond; Borland & Borland; Kaufman & Associates PC; Greenberg & Bederman; Childs, Bishop, White

13. **Changes to Case and Web Status Screens.**

We have made the following changes to information that can be added to a Case or Web Status Screen.

- All name fields will display the default address, first 3 phone numbers, and default E-mail. You can re-size this field to show as little or as much of this data as you want.

- Fields from the Staff Personal Info Tab are now available for status screens for staff assigned on the Case Tab.
Multiple parties may be selected.

The Party “group box” will replace the Party User box and the Party and Party User information will be combined. The Party screen will have the three checkboxes like the other screens that have status options.

Age and Age at DOI will be available as party fields.

Note Topic, Party Role and Insurance Type mini directories will have check boxes for the three status tabs. This will allow you to designate specific codes to be checked for status by default when making new entries. Changing the mini directory choices will prompt to update all existing entries.

Individual value items in a case, not just by code, can now be added.

Specific case checklist items, not just by code, can now be added.

All list screens that are included in status will display status screen check boxes to easily identify items that have been flagged for status (i.e., Notes, Insurance, Value).
See Section 2, Chapter 1 and Section 2, Chapter 15 of the Needles manual for more information.

Wished For By:  Stark & Stark; Jim S. Adler, P.C.; Carter Mario Injury Lawyers; McAllister, Hyberg, White & Cohen; Zanes & Associates; Litster Injury Lawyers; Meggesto, Crossett & Valerino, LLP; Berg Injury Lawyers; Babcock Law Firm LLC; Georgelis Law Firm PC; Handler, Henning & Rosenberg


There are two new priorities with respect to using Web Status in Needles. The Priority to Change Web Status Selections has been added to control whether a staff person can select Web Status check boxes for information to export for Web Status. Assign either an “A” to allow selection or “X” to not allow.
A new priority also exists to control which staff has access to and the ability to assign Web User ID and Password information. Assign an “A” or “B” priority to grant the ability to Add and Modify Web User IDs and Passwords. Assign a “C” priority to grant read only permission to ID and password information. Assign a priority of “X” to deny all access to this information.

See "Appendix B: Staff Priorities" of the Needles manual for more information.

Wished For By: Fleschner, Stark, Tanoos & Newlin; Crumley Roberts LLP

15. Additional Confirmation Warnings Have Been Added For Web Status Users.

Options now exist on the Staff Preferences Web Status Tab to prompt when changes are made to information in a case which may effect web status information. Prompts can be set to confirm when a manual change has occurred on a web status selection. Prompts can also be set when new items are added to a case that matches a default selection for web status. Only staff with an “A” priority to the Staff Directory can select the options for the staff preference settings.

See Section 2, Chapter 4 of the Needles manual for more information.

Wished For By: Demayo Law Office; Various eCaseStatus Prospects
16. **Ability to Change Sort on Case Status Report Has Been Added.**

When running the Case Status Tab Report, you may now change the Sort order. The default sort order is by case number. Just click on the new **Define Sort** button, then drag and drop the field(s) you wish to sort by.

![Image of Define Sort button and Drag & Drop feature]

*See Section 6, Chapter 2 of the Needles manual for more information.*

*Wished For By: Miller, Curtis & Weisbrod LLP*
17. **New Toolbar Settings.**

There is now a new tab under Staff Preferences for selecting individual preferences for the buttons a user wishes to see on their Needles toolbar. Some items have been moved from the Staff Preferences General tab to this new Toolbar tab.

![New Toolbar Settings Image]

*See Section 2, Chapter 4 of the Needles manual for more information.*

*Wished For By: Phillips & Lyon; Mooney & Associates; Keller & Keller*
18. **New Option to Select Middle Initial or Middle Name to be Used in the Default Full Name Parameter.**

On the Word Processor properties tab, there is now an option to select Middle Initial or Middle Name to use in the Default Full Name Parameter.

*See Section 1, Chapter 3 of the Needles manual for more information.*

*Wished For By: Needles Trainers*

19. **New Default E-Mail in Party Document Merge Parameters.**

A new party document merge parameter for Default E-mail has been added.

*Wished For By: Gordon Edmunds Elder PLLC; Mooney & Associates*
20. **Functional Changes to Checklist Summary on Needles Today Screen.**

In the Checklist Summary portion of the Needles Today screen, clicking anywhere on the line item will no longer take you to the case. You must now click on the Case Number to open the case.

*See Section 1, Chapter 4 of the Needles manual for more information.*
21. **Calendar Now Allows More Than 10 Untimed Events Each Day.**

Needles Calendar will now allow more than 10 untimed events on any given day. The first 10 will display on the calendar, with an arrow and three dots indicating there are more. Double-clicking on the arrow and three dots will display a List of Untimed Events, which includes options to View, Add, Modify, or Delete Untimed Events.

*See Section 4, Chapter 1 of the Needles manual for more information.*

*Wished For By: Dickson & Campbell LLC; Needles Trainers*
22. **Daily/Weekly Calendar Display Has Been Updated to Show Indicator When There are Appointments Above/Below Displayed Time.**

The Needles Daily/Weekly Calendar view now displays an Indicator if there are appointments above or below the displayed time. Clicking on either the up ▲ or down ▼ indicator button will move you to the next appointment above or below the visible time within that column. This also corrects a display issue when there were more than 20 items on a given day.

![Daily/Weekly Calendar Display](image)

*See Section 4, Chapter 1 of the Needles manual for more information.*

23. **When Changing a Recurring Calendar Item, Items Marked Done, No Show, Canceled, Rescheduled or Postponed Will Not Be Updated.**

Now when you change a Recurring Calendar item and elect to update all recurring items within the group, items with a status of Done, No Show, Canceled, Rescheduled or Postponed will not be updated. However, when changing a recurring item for multiple staff, the update will occur regardless of status.

![Update Entries](image)

*See Section 4, Chapter 2 of the Needles manual for more information.*

**Wished For By:** David Allen & Associates; Hughes & Coleman

The Document Tab in Needles 4.8 will only display the first three columns in the List View. This will allow for more characters of the document's file path to display.

See Section 3, Chapter 11 of the Needles manual for more information.

Wished For By: Trantolo & Trantolo; Abes Baumann, P.C.; McKernan Law Firm; Murphy Peluso LLC; Pettit & Pettit; Software & Information Industry Association; Law Office of Stephen Johnson; Zanes & Associates; Ben Abbott Law Offices; Daniel & Stark PC; Steven Defoe Law Office; Leemon & Royer, PLLC; Stark & Stark; Bruno & Bruno LLP; Clary & Overton LLP; Ron Meyers PLLC; Thomas M. Kiley PC & Associates; Meehan, Boyle, Black & Bogdanow, P.C.; Allen Law Firm PA; Shreader & Associates; Landskroner Grieco Madden, LLC; Munley, Munley & Cartwright; Benson & Bingham; Marcari, Russotto, Spencer & Balaban PC; Richard Harris Law Firm; Foy & Associates, P.C.; Ranalli & Zaniel LLC; Manelis & Beresen; Stephen D. Walsh Law Office; Rosner Law Offices PC
25. **New Individual Staff Priorities For Each User Defined Tab and the Case Status Tab.**

There are now staff priority settings that can be set for each User Defined Tab and the Case Status Tab. As with the other priority settings, you can assign for each staff person the different access levels: Full Access, Add/Modify, Read Only, Restricted or No Access.

![Staff Priorities for ATTORNEY](image)

*See "Appendix B: Staff Priorities" of the Needles manual for more information.*

*Wished For By: Needles Trainers*

26. **New Priority for Zip Code Maintenance.**

There is a new staff priority setting for Zip Code Maintenance. Entering a zip code that is not currently in the Zip Code Directory into an address will no longer cause that zip code to automatically be added to the Directory.

![Staff Priorities for ATTORNEY](image)
27. **Ability to Choose QuickBooks Memo and Voucher Memo items.**

When using either of the QuickBooks interfaces in Needles 4.7 (Windows or SDK), the Needles Case Number, Client Name and Memo fields from the value item used to generate the check request would appear on the QuickBooks check memo and voucher memo lines. In Needles 4.8, you now have the option to select which of those three fields you want on the check memo and on the voucher memo.

![Accounting System Interface](image)

See Section 2, Chapter 14 of the Needles manual for more information.

*Wished For By: Katherman, Briggs & Greenberg; Needles Trainers*

When using the Peachtree options with the Needles Accounting System Interface, the Needles fields available for export now include the Vendor ID.

See Section 2, Chapter 14 of the Needles manual for more information.

Wished For By: Stewart & Stewart; Needles Trainers
29. Settlement Memo is Now Available From the Report Button on the Value Tab.

The option to generate a settlement memo is now available on the reports menu that displays when clicking on the Report Button on a Value Tab entry.

![Settlement Memo Option]

See Section 3, Chapter 13 of the Needles manual for more information.

Wished For By: Bornstein Law Office


There is a new staff priority setting for allowing staff to run Settlement Memos from Needles. Assign the priority of “A” to allow or assign “X” to not allow.

![Staff Priorities Setting]

See "Appendix B: Staff Priorities" of the Needles manual for more information.

Wished For By: Mooney & Associates; D. Patrick Daniel, Jr., LLC; Munley, Munley & Cartwright
31. **Middle Name is a New Field on Staff Preferences Personal Info Tab.**

There is now a Middle Name field on the Staff Preferences Personal Info Tab which is available for coding in merge documents and pdf documents, as well as for inclusion on user defined screens.

![Middle Name Field on Staff Preferences Personal Info Tab](image1)

*See Section 2, Chapter 4 of the Needles manual for more information.*

Wished For By: Needles Staff

32. **Name Fields on All User Defined Tabs Can Be Re-Sized to Display Default Address, Phone, and E-Mail Info For That Name.**

All name fields on all user defined tabs can now display the default address (including Contact or Company Name when applicable), the first 3 phone numbers, and the default E-mail. You can re-size this field in the tab setup to show as little or as much of this data as you want.

![Name Fields on All User Defined Tabs](image2)
33. **Added Status of Case to the List Cases for Party Screen.**

When clicking on **Cases > List Cases for Party**, the status (open, closed or dormant) of the cases listed will display in the List Cases screen.

![List Cases for Party Screen](image)

*See Section 3, Chapter 14 of the Needles manual for more information.*

*Wished For By: Ben Abbott Law Offices; Needles Trainers*
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34. New Warning Prompt When Attempting to Save New Case Without a Client.

If you try to save a new case without marking a party “Our Client”, you will now receive a warning prompt. Clicking Yes in response to the prompt will allow you to return to the party screen and designate the appropriate party as a client by checking the “Our Client” checkbox.

See Section 3, Chapter 3 of the Needles manual for more information.

Wished For By: Needles Trainers

35. New Warning Prompt When Attempting to Type Over Party Name.

Now when typing over a Party or Provider name field in a case, a warning message will appear explaining that the change in name will affect all areas in Needles where this name is attached. This feature was designed to prevent a name from being replaced accidentally with the wrong name.

Wished For By: Needles Trainers

36. New Warning Prompt When Attempting to Type Over a Staff Code.

If you attempt to type over a Staff Code in the Staff Code Directory, you will now receive a message stating where that Staff Code is currently in use. The user is then instructed to add a new Staff Code instead and use the Replace function.
See Section 2, Chapter 4 of the Needles manual for more information.

Wished For By: Omer & Associates; Wayne Wright Injury Lawyers; Berg Injury Lawyers; Craig P. Kenny & Associates; Needles Trainers

37. Billable Time is Now Calculated in Six-Minute Increments.

Billable time is now automatically calculated by taking the time spent and rounding it up to the next six-minute increment for billing purposes.

See Section 3, Chapter 22 of the Needles manual for more information.
38. Ability to Grant Case Type Access to All Staff When Creating New Case Type Has Been Added.

If you are limiting staff access to case types, you will now be prompted whether you wish to grant access to all staff when adding a new case type to your system. Clicking on Yes will mark all staff as having access to that case type. Clicking No will not mark any staff with access and you will need to manually assign individual staff access to the case type.

See Section 2, Chapter 1 of the Needles manual for more information.

Wished For By: Trantolo & Trantolo; Habush, Habush & Rottier; Craig P. Kenny & Associates; Dyer, Garofalo, Mann & Schultz

39. Case Type and Header Now Appear on Case Type Setup Window.

The Case Type and the Case Type Header will display at the top of the window when accessing the Case Type setup screens.

See Section 2, Chapter 1 of the Needles manual for more information.
40. Tab Names Now Appear on Buttons on User Defined Tab in Case Type Setup.

On the User Defined Fields tab in Case Type setup, you will now see the actual Tab Names assigned to the individual user defined tabs rather than the user defined tab number.

See Section 2, Chapter 1 of the Needles manual for more information.

Wished For By: Jeff M. Goldberg Law Offices, P.C.; Needles Trainers

41. Date of Incident Case Header Will Now Match Field Label.

If the Date of Incident field label has been renamed, the Case Header will now reflect the change rather than showing DOI. The Header will show the initials of the renamed label using the first letter of each word of the new label or the first three characters if the label is only one word.

See Section 3, Chapter 4 of the Needles manual for more information.
42. Printing Case Type Directories Has Been Updated.

The Case Type Directories report has been updated to include new fields and case type options added since Needles version 4.6.

See Section 2, Chapter 1 of the Needles manual for more information.
43. Provider Listing Report Will Now Show Name of UD Tab Involvement.

When running the List Case report for a particular provider, you will now see the actual name of the user defined tab where the Provider shows involvement in a case.

See Section 2, Chapter 9 of the Needles manual for more information.

Wished For By: Rosner Law Offices PC; Keller & Keller; Kurgis Law Office; Crumley Roberts LLP; Needles Trainers

44. An Intake Party's Notes and Documents Can Now Be Copied To New Case.

If a Party on an intake has note and documents attached to their provider entry, then when the intake is made into a case, the user will be prompted to copy those items to the new case.
45. **Ability to Delete All Fields From Intake Screen Has Been Added.**

You can now delete all fields from a custom intake screen, including the Date of Incident, Staff 1 and Last Name fields. This will allow you to copy an intake screen from another case type.

*See Section 2, Chapter 1 of the Needles manual for more information.*

46. **The Default Intake Screen Has Been Changed.**

When creating a custom intake screen, the following fields have been removed from the default intake layout: Business Address, Business Address2, Business City, Business State, Business Zipcode, Business County, and Business County. The majority of Needles users do not want these fields on their intake screens so they have been removed.

*See Section 2, Chapter 1 of the Needles manual for more information.*
47. Length of Insured and Limits Fields Has Been Increased.

On the Insurance Tab, the Insured and Limits fields have been increased to 50 characters.

See Section 3, Chapter 7 of the Needles manual for more information.

48. New Phone Dialer Option For Use With Internet Services.

A new option has been added to both the firm Phone Dialer global setting under Utilities > Properties and individual phone dialer settings in the individual staff preferences. This will allow the firm and/or an individual staff to make use of the Needles phone dialing feature when using an Internet service such as Skype.

See Section 1, Chapter 3 and Section 2, Chapter 4 of the Needles manual for more information.
49. **Purchase Additional Needles and Sybase Licenses.**

There may be times where you will need to purchase additional Needles licenses. You may be hiring additional staff or expanding your firm's Needles usage to another department. Now you can easily purchase additional Needles and/or Sybase licenses right from the Needles Help menu. The screen will automatically fill in your existing Needles and Sybase licensing numbers. You just add what you need and the figures are calculated. Click on a button to generate the order form.

![Purchase Additional Needles Licenses](image)

*See Section 1, Chapter 1 of the Needles manual for more information.*

*Wished For By: Needles Accounting Department*