

New Benefits from Seneca CM

Introduction

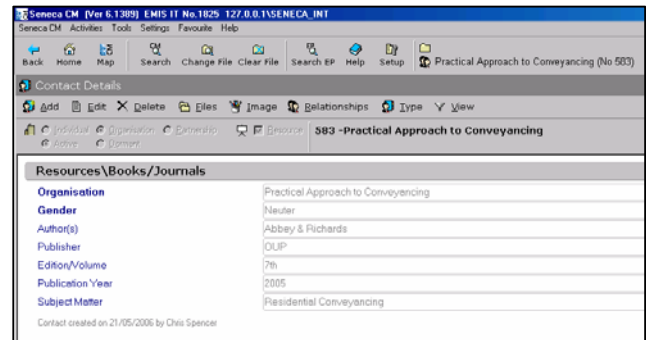
This 'Benefits from Seneca' newsletter from **emis intellectual technology** introduces enhanced Contact and Task Searches, Contact updating en masse, linked Code Lists, new Seneca PM facilities and widened Seneca EP searches.

Contact Searching

Additional Fields added to the contact details can now be set to be included as part of a search from the (F5) Search, Filter screen. As well as aiding searching on ad hoc fields (such as home telephone numbers) this can also be used in more interesting ways.

For example, set up a Contact Type called Resources, Books/Journals and create some Contacts:

Then Filter the Contact Search to look for the additional field 'Subject Matter':



Search Filter

Save X Cancel

Search

Search on empty details Yes

Search-Files

Show File Type Name Yes

Show Ledger Balances No

Search-Contacts

Show Contact Type Name No

Show Correspondence Name Yes

Show Tel. No. Yes

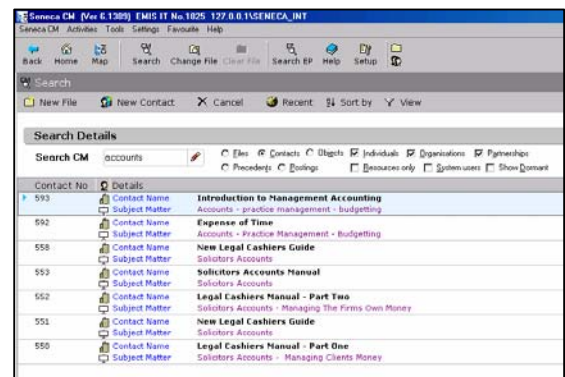
Show DX Number No

Contact Conflict Filter No

Additional Field To Display

Additional Field To Display

The result is a library management system using Seneca allowing the user to find all the books with a subject matter concerning accounts:



Seneca PM

The cheque printing functionality has been updated to allow users to print a single cheque for multiple postings.

A new feature has been introduced where, if a contact has multiple files, users can view the ledger balances for all of these files simultaneously. This feature is available via a new menu option of 'Contact Balances' in the File Ledger screen.

Finally, a number of additional reports have been produced – please refer to the release notes for version 6.1330 for full details of Seneca PM enhancements.

Seneca EP

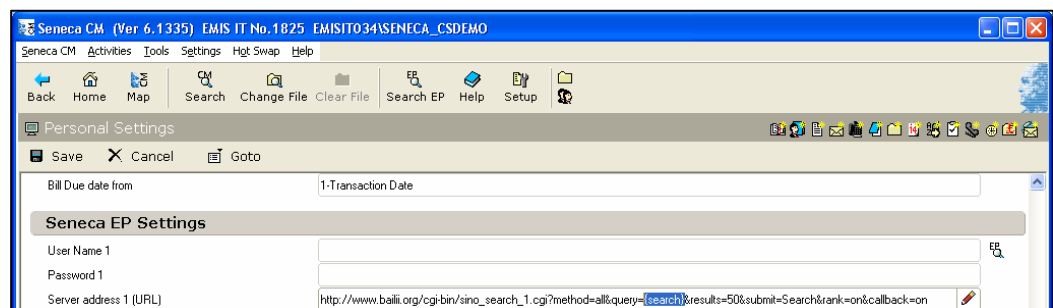
We've had a number of requests to extend the Seneca EP search facilities into other information sources.

For example, what if I want to search BAILII or Google (or even an appropriate intranet run by my firm) using free text searches or information from Seneca?

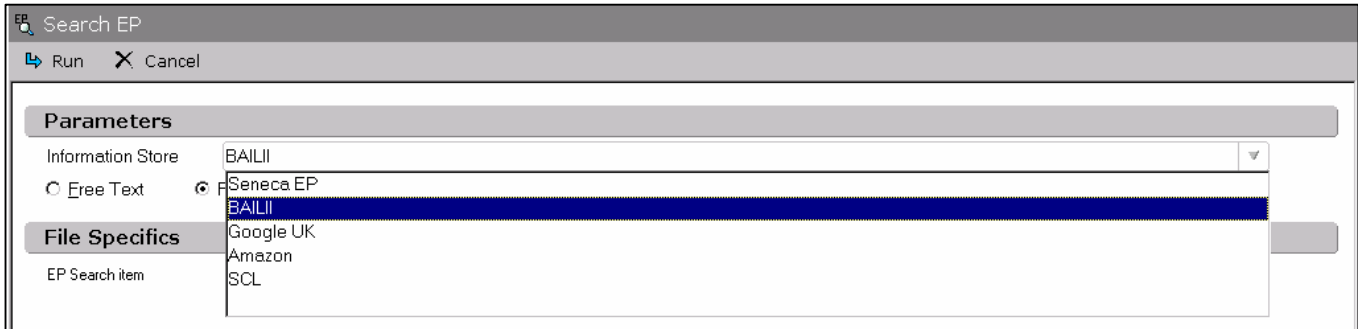
Personal settings have now been modified to allow for up to five URLs, usernames and passwords. When entering a URL, if the following characters are present they will be replaced accordingly:

- {Username} – matching username for selected URL
- {Password} – matching password for selected URL
- {Search} – search text

So, in the example shown, {search} will be replaced with the required search term:



And when running Search EP, the system has been modified to allow selection of the relevant information store:

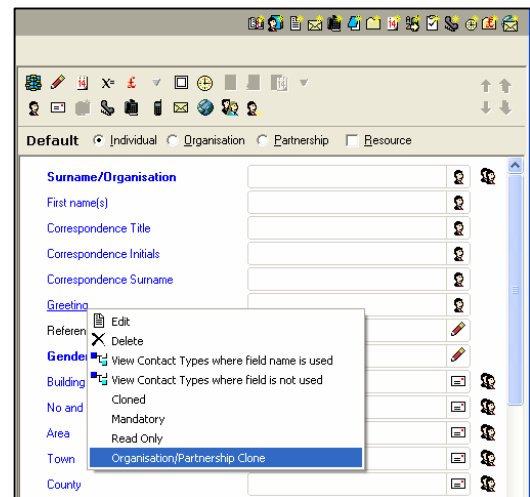


Contact Editing En Masse

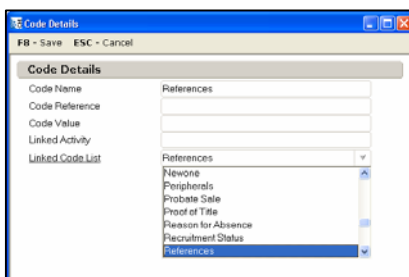
Do you have more than one contact at a particular firm?

And if the main office address changes wouldn't it be nice to just change one of those contacts and have the rest change automatically?

Contact Fields can now be marked for inclusion in "Organisation/Partnership Clone" and if/when one of the relevant field values is changed Seneca CM will check if there are any other fields with the same value and offer to change those as well.



Linked Code Lists



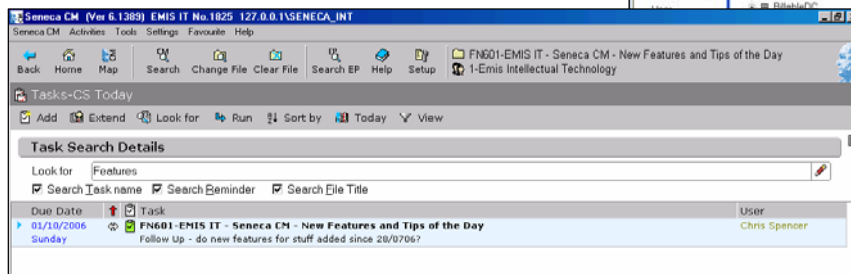
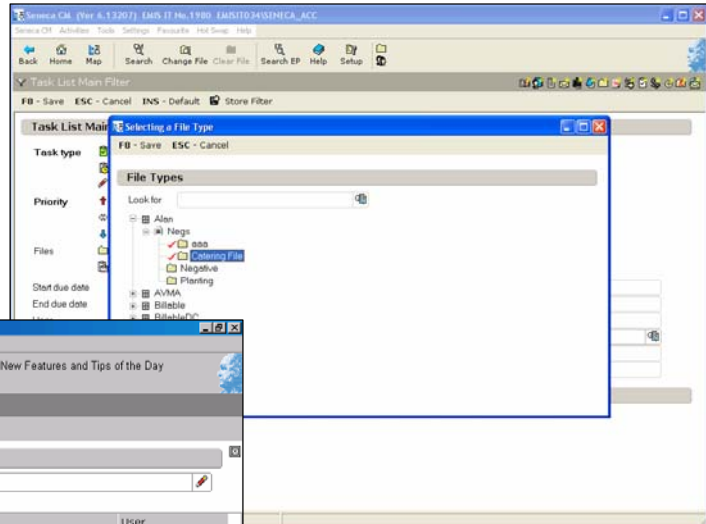
Using this new feature you can relate each Code List item to a Linked Code List:

The result is that you can create "conditional lists" where the answer to question 1 will affect the list of choices given for question 2 .

Task Searching

The Task List Filter now allows selection of multiple File Types (rather than limiting you to one or all):

And the “Look For” Task Search option within the Tasks screen presents the searcher with a more “F5 Search-Like” view:



Conclusion

Seneca CM relies on both us and you for its growth and development.

Why not consider joining the **emis intellectual technology** National User Group (NUG). Membership also allows you to network with colleagues in like minded firms and – through the NUG escrow licence – will give you the benefits of an escrow at a discounted fee.

For further information or training please contact your Client Relationship Manager on 08701 223342.