Release Notes

Update: v2.15.1

Windows Case Management App
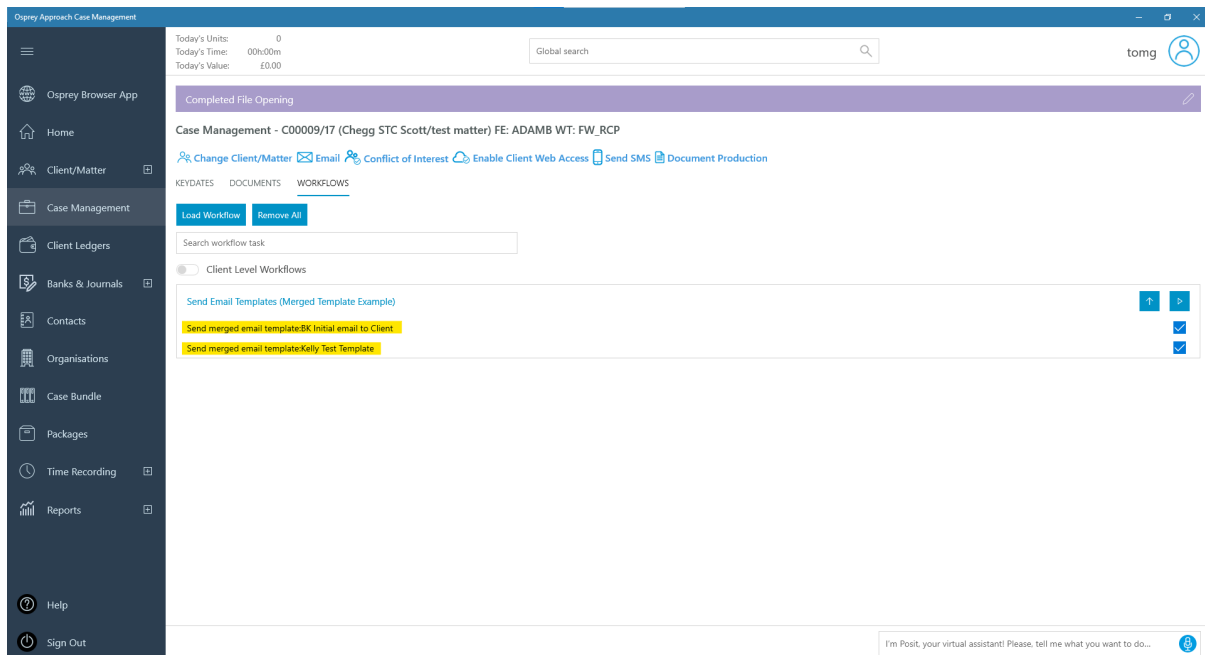
Contents

Multiple 'merged email template' actions in workflows

Previously, if two "Send merged email template" actions were concurrent in a workflow task, the second action would not run.

This has now been fixed, so users can have as many "Send merged email template" actions running concurrently, as they like.

Include archive when performing conflict check

Previously, if the client site was set to include archive clients as default, this was not pulling through when running conflict of interest checks, meaning that clients had to remember to turn the switch on.

This has now been fixed, so that the setting applied to the site in Supervisor > System Setup > Configuration Settings pulls through to the app.
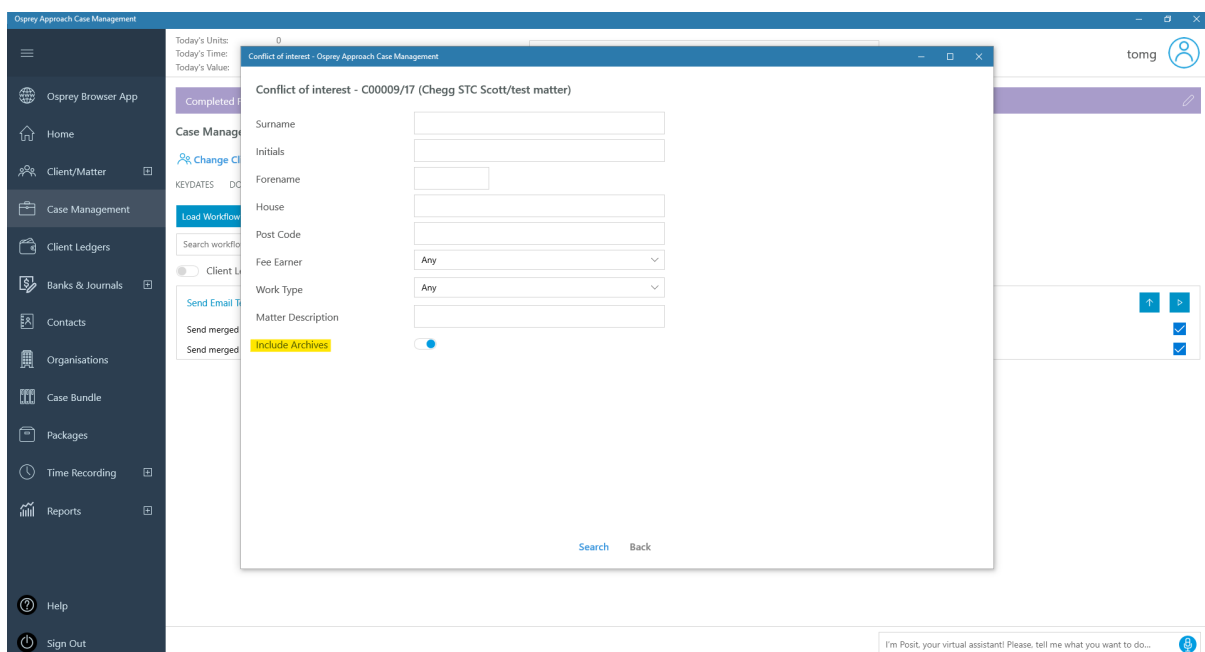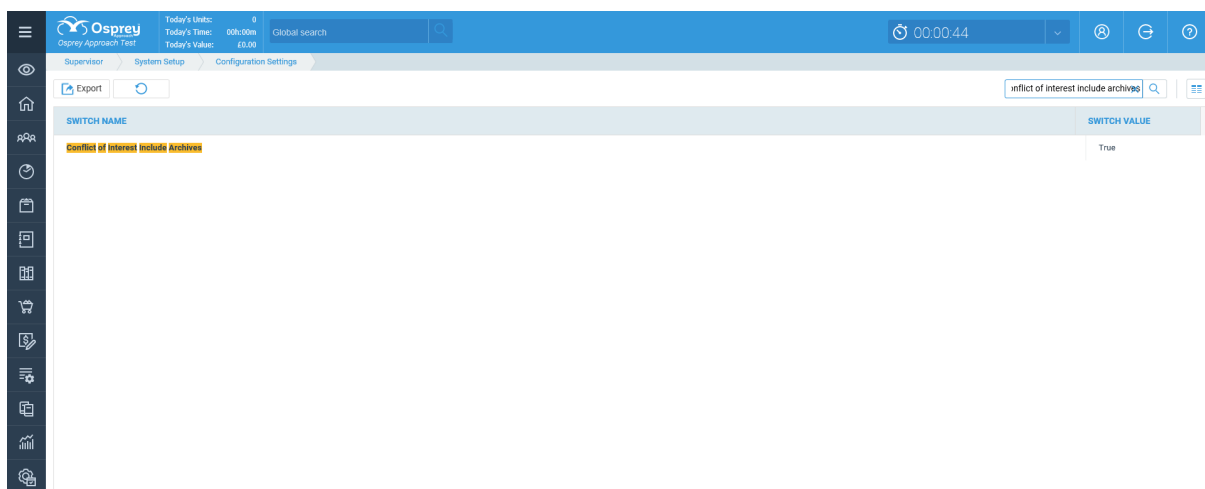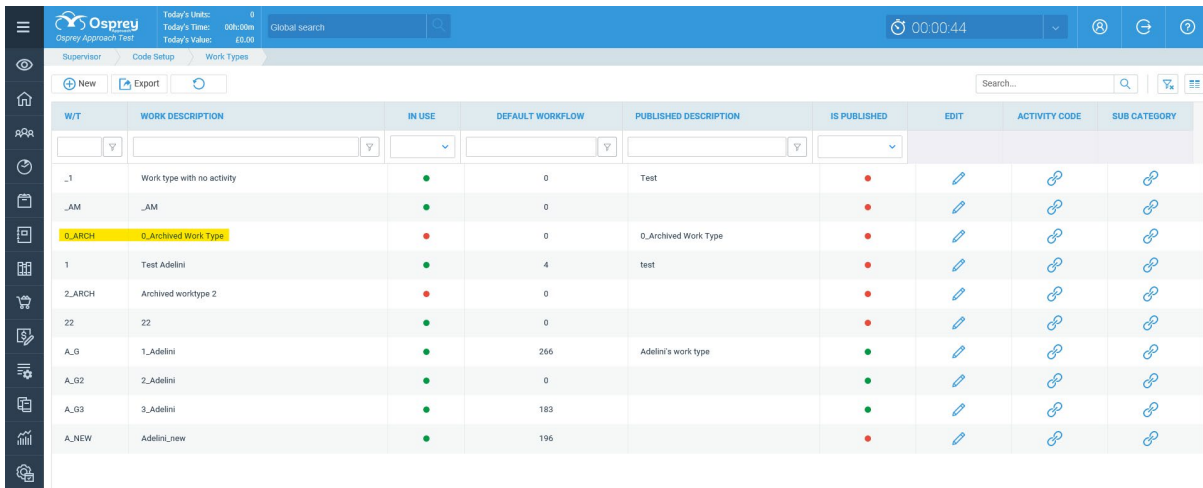
SMS matter number

Previously, matter numbers were showing as decimals when used in an SMS message.

This has now been fixed so that matter numbers no longer show 1.00 and now display as 1, for example.
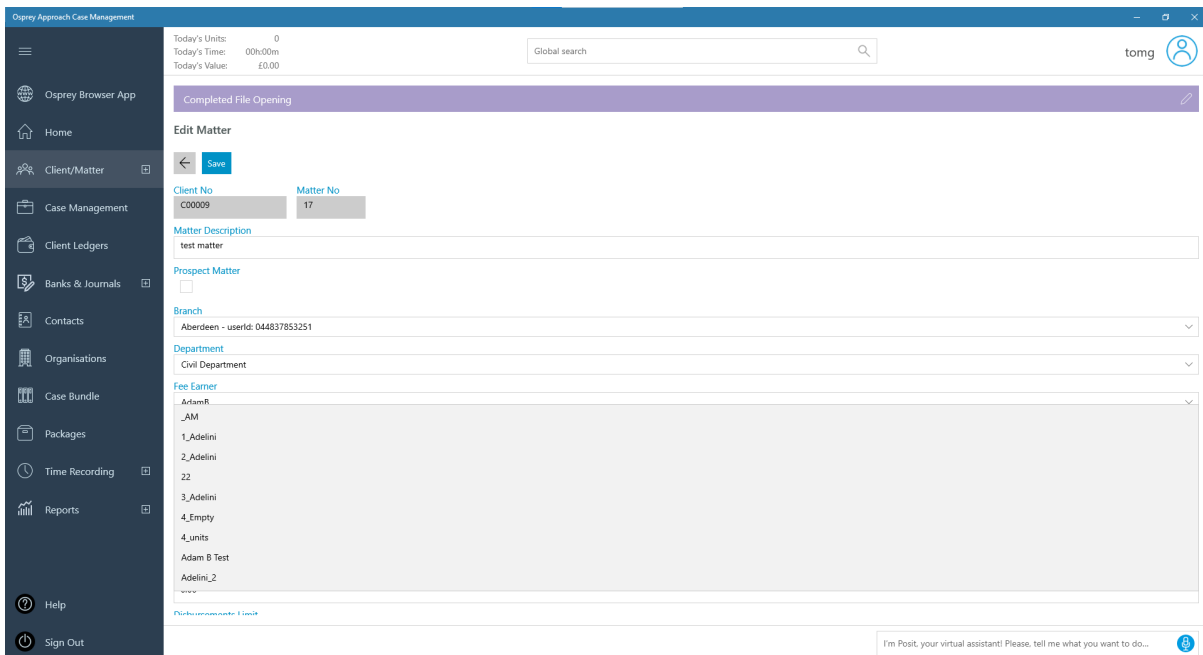
Archived worktypes

Previously, archived worktypes appeared in dropdown lists.

This update has removed archived worktypes, so they can no longer be selected. For example, when opening a new matter so the highlighted worktype below is no longer showing in the list.

Worktype list

The worktype list now shows options in alphabetical order.
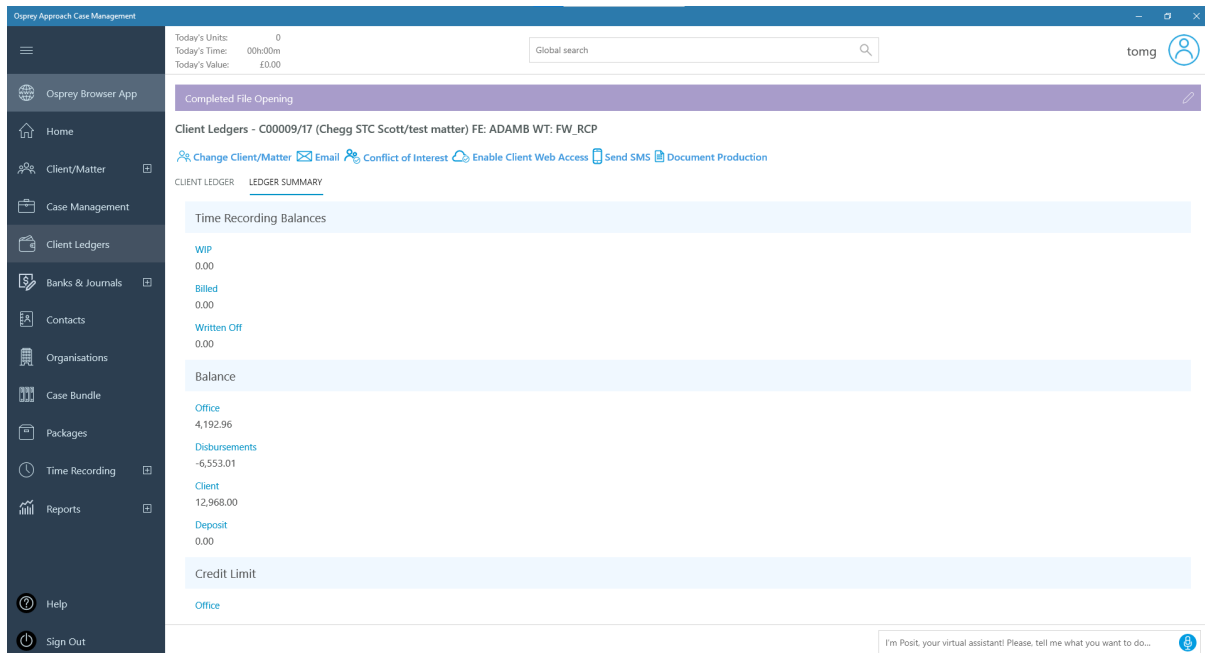
Formulae and client names

Previously, formulae would not display if special characters where in the data set. For example, if there was a formulae for client names, if the surname had an apostrophe in it, the formulae would not work.

This has now been fixed to display any special characters in the formulae.

Ledger summary

An issue existed where the ledger summary, under Client Ledgers, was duplicating the office and disbursement value and not displaying the client or deposit values.

This has now been fixed to show the client / deposit values, where previously the office / disbursement was duplicated.
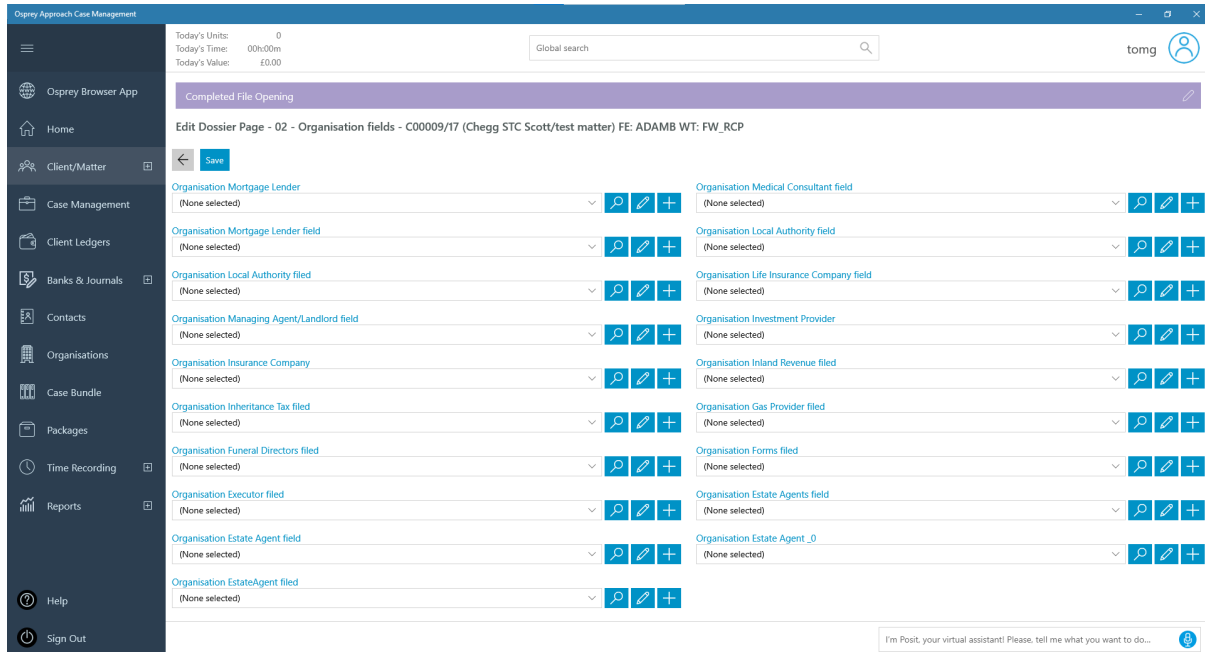
Organisation fields

Previously, you were unable to add / edit organisations when filling out Dossier pages.

This update now enables you to include the add / edit buttons when filling out dossiers.
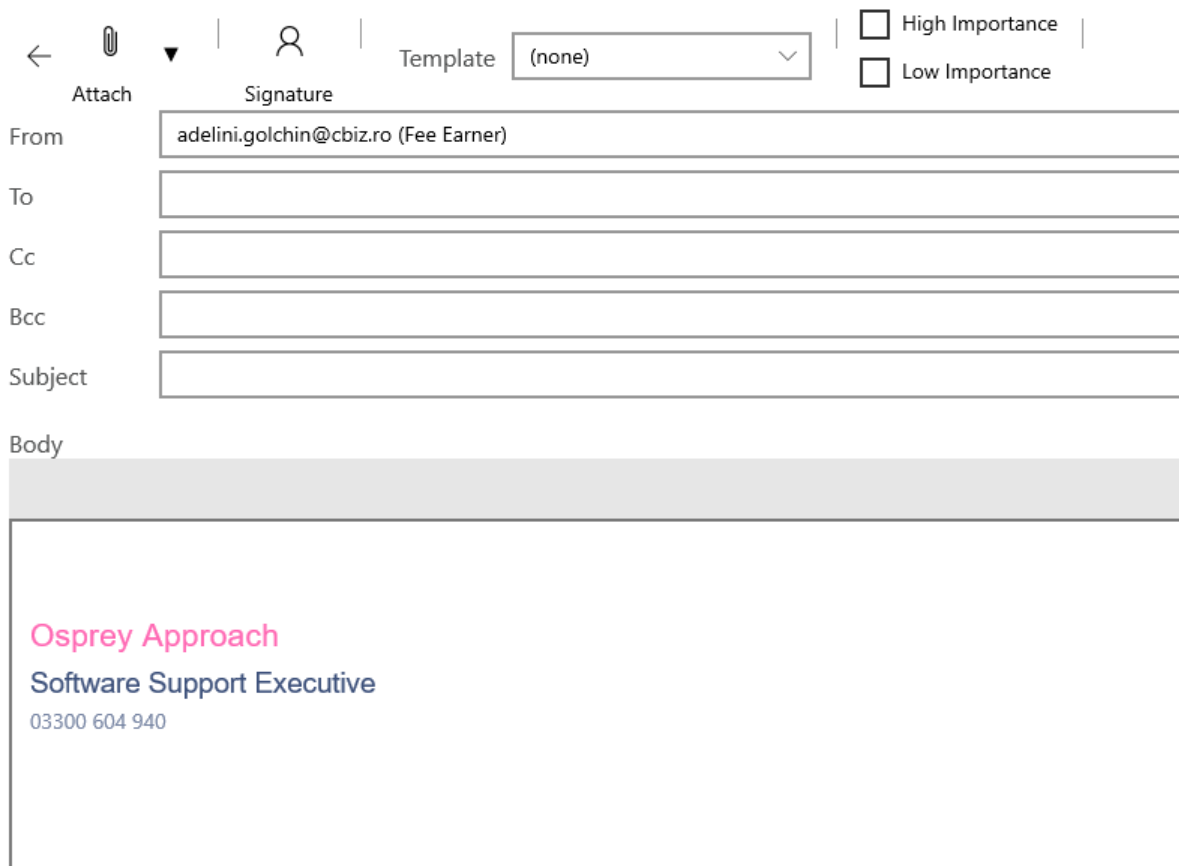
Email signatures

Email signatures had not been displaying the same way as they did in the browser.

With this update, email signatures now display the same in the case management app as they do in the browser.

Outlook connector emails

Users previously were unable to reply to an email that was imported using the outlook connector.

With this update, emails can now be replied to, even if they are imported using the outlook connector.