PracticeEvolve Release – R.8

Release Notes

CRE-2901: Due on Date Disappearing on Record Purchase Screen

Fixed issue when entering a supplier invoice via 'Record Purchase', the Due on Date is populated automatically based on the supplier credit terms and the date of the invoice (second screenshot). However, when an invoice number is entered, the Due On (date) disappears.

CRE-2892: Sync Supplier Emails from Accounts to Docs on Save

The system will now sync two entity emails from the documents system to the accounting system for suppliers and all other entities.

CRE-2889: (IE/UK) System Verification Report Enhancements

Ledger Balance for Trade Creditors was originally taken from the value of the Total field in the Aged Creditors Report. But the calculation of that field is a sum of other values, including the Debits value. So that the Debits value no longer used in the sum calculation for Ledger Balance for Trade Creditors in the System Verification Report and so now matches correctly with the Nominal balance.

The value for the Nominal Client Deposit field is now subtracted from the Nominal Client Balance.

CRE-2888: Client Care Partner Field Fixes

Fixed issues with the field not being properly visible on a number of reports and screens.

CRE-2886: Accounting Screens Attachments Fixes

Cleaned up a few issues in the attachment selectors and attachment grid view columns to make the behaviour more consistent.

CRE-2821: Invoice Notes

Invoice notes is now a table and keeps a record of who added the note and when.

CRE-2777: Web Portal settings screens should show a scroll bar when applicable

Web portal settings screen now shows scroll bars for smaller resolution screen.

CRE-2770: Matters with historical nested child workflows cannot open the tasks list

Improved the performance of loading the data for the show workflow instances screen on matters.

CRE-2757: Archived matter deletion mechanism

Users can logically delete multiple matters that are completed, archived and passed their date of destruction. This is the equivalent action to the current delete matter process which can only be run for single matters

Users can permanently delete multiple matters that are completed, archived and passed their date of destruction. Database rows aren't deleted but text data is wiped making this a non-reversable action.

CRE-2746: ForEach on a table from the Firm Details screen

User can now run a ForEach tag against data held on tables on the Firm Details screen.

CRE-2674: Group Membership Discounts feature

“Group Discounts” can be recorded against a matter. The “Group Discounts” are automatically applied to the invoice and the invoice is automatically updated as changes are made.

“Group Discounts” do not apply to new items added on adjust invoice screen.

CRE-2840: Include uncleared funds when warning the user about Client account overdraw for payment requisitions

User will now be warned on creating a requisition that would overdraw the client account.

CRE-2841: Warn the user if the requisition cannot be satisfied using the unprotected balance of the Matter

The user can now have the system warn them if there will not be enough money in the client account to satisfy a requisition if the matter balance less protected funds is not enough to cover the request.

CRE-2842: Option to warn on Office balance going into credit

In Accounting Options → General the user can select an option to 'Prevent Office Credit Balance' this will warn the user when a Office Receipt, Trust to Office Transfer or Matter Credit note will place the matter office balance in credit.

CRE-2647: iManage Beta release

Initial release of iManage integration. This integration is only available to new deployments of PracticeEvolve.

CRE-2639: Perfect Portal integration Beta release

Initial release of the Perfect Portal integration. This integration is currently only available to clients in the testing group.

CRE-2604: Adjusting the values of a billed anticipated disbursement fails if bill is in closed period

Resolved issue where billed anticipated disbursements couldn't be adjusted if it was initially recorded in a closed period. The disbursement is now adjusted as at the current date.

CRE-2448: Automated remittance advice emails

Add option to automatically send remittance advice pdf to supplier on purchase payment posting from the Pay Purchases screen. In v1 of this feature the option is global and there is no capacity for the email to have any body text.

CRE-2445: Add a client level status that prevents postings

The alerts system can now be configured to prevent Recording Time Entries, Transaction Posting and Create Matters. There are two new conditions - Client Status and Matter Category/Instance.

CRE-2440: Nickname for time entries

Users can create cosmetic 'tags' in the Accounting options screen on a per user basis. These can be assigned to time entries to find them quickly later.

CRE-2298: Issue where Client to Office transfer "Import Transfer List" throws an exception

Fixed null reference error with this feature.

CRE-2187: Bank Import - Add more editable fields for the Post New action

The "Import Bank Transactions" view when "Post New" is selected now has enterable fields so the matching posting entry can be created from within the view.

There is an "Advanced" button which takes the user to the "Modify Payment" view, this is the current way "New Post" entries are added.

From the "Import Bank Transactions" view when "Post New" is selected the user will be able to add the matching posting entry from within the same screen.

CRE-2153: Ensure Document Links Provided by API expire + restrict access

The API and Web Portal now share documents based on temporary download links. All document downloads via the portal now require the user to be logged in and have access to the matter.

To create a temporary download link, there is now a sub menu option ("Generate link…") under "Web Portal" in the right click menu in the document explorer. Access to this is restricted as a role feature with the CREATE permission. The user needs to choose an expiry date and time for the link, but this is defaulted to 24 hours. The link uses an encrypted token of the expiration time as well as the document GUID so it is not possible to access the link beyond the expiration time without knowing the encryption key. The URL is not stored anywhere as all information required is in the link itself.

The existing Web Portal right click sub menu option for Permissions is also now updated to use the same role feature permission system with a permission type of UPDATE. A minor UI bug is also fixed where if a user did not have permission for any Web Portal sub menu option, the parent menu command still appeared.

CRE-1973: Allow the main tasks view to be filtered by Group

Users can now filter the Diary/Tasks view by Group as well as individual users.

CRE-804: Update Directory search to use index based search

The directory search is now powered by a search index for faster search performance.

ESC-465: Forms Designer - Editrole attribute not saving

Editrole now saves correctly when edited in Forms Designer.

ESC-450: Modify pop up when enabling MFA for all users

Changed wording of text on MFA pop-up screen.

ESC-412: Floating Timer ignoring Non-Billable flag

Floating timer now respects non-billable flag.

ESC-387: Email Workflow Activity doesn't Include Evolve ID in Email Body

Workflow emails now add the conversation guide to the body of the email to allow for auto filing of responses.

ESC-386: New Email within Practice Explorer doesn't Include Evolve ID

New emails created in the practice explorer now add the conversation guide to the body of the email to allow for auto filing of responses.