Release 1.9.128 – Dec 17, 2025
Enhancement/Change

- Legal Compliance Enhancement
    - o Deposit Slips Client information - Deposit slips now display the related clients as per LSO requirements
    - o BC TAF report: The Client Ledger Report now supports filtering the report for any clients that exceeded a trust balance of 10k over the time period of the report. A view will be prepared that BC clients can use until we issue a more permanent fix. This is to support the Jan 1 2026 requirement of Law Society of BC
    - o Internal Logging fixes and enhancements
- Bug Fixes:
    - o Legal Accounting / Practice Management Fixes
        - ▪ Long descriptions hiding Sync status indicator
        - ▪ LEDES billing country code field added to support PM country codes
        - ▪ Improvements to support for Group contacts
    - o Critical fix to backend request service to reduce the chance of system failures
    - o Internal fixes to issues identified during AWS migration
    - o Improvements to make the CSV import solution (SR / Soluno Remote) more robust and easier to manage
- Security Enhancements
    - o Various security enhancements identified by our SOC 2 Audit analysis

Release 1.9.123/124/125/126/127 – Dec 2nd, 2025
Internal Changes to Support AWS migration

Release 1.9.120/121/122 – Nov 21, 2025
Internal Changes to Support AWS migration

Release 1.9.119 – Nov 13, 2025
Bug Fixes & Minor Improvements:

- Addressed issue with connecting with Gravity Legal

Release 1.9.118 – Nov 12, 2025
Enhancement/Change:

- Bank Rec Optimization - Improvement to queries to improve load times of saved Bank Reconciliation
- Removed Soluno branding from emails
- Security Optimizations
    - o Enhanced encryption for internal passwords and stored data
    - o Various fixed vulnerabilities from security scanning
- Other internal improvements

Bug Fixes & Minor Improvements:

- Fixed Firm billing tokens
- Device Lockout issues fixed where a customer was locked out and unable to be reset by admin or password reset
- PST Report will no longer show duplicate PST payments with double payment and reversal

Release 1.9.116/117 – Oct 23, 2025

Enhancement/Change:
- New Conflict Search summary to identify which timekeepers/responsible lawyers are associated with results

Bug Fixes & Minor Improvements:
- Can now re-NSF prior NSF'd entry (redo rollback)
- PST remittances deprecated from Payables screen, must use Operating Out
- Fix to issue where NetDocuments integration intermittently gets disconnected
- Tweak to invoice pdf download process
- Minor Changes
  - Updated login background image
  - Internal logging for intermittent issue where user disappears and is disabled (checksum issue)
  - Updated some error message text for clarity
  - Internal changes to better support on-prem clients, improve architecture and improve release processes

Release 1.9.114 – September 24, 2025

Security Updates:
- Rotated keys for some connections
- Updated connection key to LawToolBox
- Updated security layer for Admin API

Release 1.9.109 – September 19, 2025

Bug Fixes & Minor Improvements:
- Log in as via support user no longer consumes a login
- Potential fix to data corruption trust at the time of billing data corruption issue. Additional Logging also added.
- Fixed Excel/CSV export issue where GL report shows "cont." instead of proper GL name for large reports
- Updated error message when stopping a user from opening a new bank rec when the prior one is completing
- Minor fixes from Beta of new screen saving micro-service

Actionstep PM/LA integration fixes
- Trust hold dates default set to 0
- Updated error messages for login via integration
- Improvements to data sync tool

Internal: Support (AP) code generator now will use O365 credentials instead of custom authentication

Release 1.9.108 – August 13, 2025

Enhancement/Change:
- Updated error message when attempting to open a Bank Rec that is currently being actively closed

Fixed:

- Bugfix related to time entry screens for new internal performance feature in beta

Release 1.9.106/107 – August 7, 2025
Enhancement/Change:

- Internal tool to handle case of Group Contacts for Actionstep Practice Management Integration

Fixed:

- Bugfix: Bank rec will no longer open a new instance until the previous period is closed

Release 1.9.105 – July 18, 2025
Enhancement/Change:

- Duplicate-receipt alert
  Quickly catch accidental double-entries before they happen.
- Simpler trust-transfer history
  Clearer logs make it easier to trace funds in and out of trust.
- Improved practice-management integration
  Smoother syncing of contacts, matters, and related data for firms using connected systems.
- Smarter invoice workflow
  Held items are released and balanced instantly, reducing manual follow-up.

Fixed:

- Accurate balances when held invoices are released.
- Deposit slips now display the correct payer when multiple receipts are included.
- Reminders list sorts correctly after filters are applied.
- "Description" filter in the Invoice Release view works again.
- Flat-fee entries with zero time are accepted automatically, with a helpful default task code.
- Additional small UI and stability improvements throughout.

Release 1.9.96/98/99/100/101/102/103/104 – June 25, 2025
Enhancement/Change:

- Ampersand(&) can now be exported correctly to Excel or CSV ("John & Mary")
- Performance Enhancement - Faster screen loads with a new modernized NoSQL snapshot service
- Unlock both users and devices after password reset
- BC TAF default value updated to $20.00
- Display home books on user editor screen when have multiple books set (ie consultant)

Fixed:

- Transaction Reminders Tab fixes
  - Fixed issue where Pay Now buttons doesn't work
  - Fixed issues loading the Transaction Reminders tab when the original transaction is updated or the reminder has been edited
- Implement a check to see if any invoices are held before allowing a user to close the PST or GST report.
- Made Description filter case-insensitive requirement on billable status

- Support users can now update external users (consultants) regardless of which firm one is editing from
- Email address in Settings > Users in correct order; fixed bug with column
- Internal Fixes
  - JS error fixes
  - Adding logging for trust transfers to diagnose data intermittent data corruption issue
  - What's New URL configurable
  - Fixed issues with contact classification and vendor status handling for Actionstep Integration
  - Added automated deployment for releases to allow more agile releases

Release 1.9.94/95 – May 29, 2025
Enhancement/Change:
- Update to support rebranding of Soluno to Actionstep Legal Accounting:
  - Menu - Updated icon for Entries
  - Menu - Firm name displayed on menu
  - Menu - New menu (UI) on for users by default
  - New Favicon to show Actionstep "A"
  - New Login Screen with Actionstep branding

Fixed:
- Unable to move on from password reset if user has another prompt as part of login process
- Intercom Chat no longer broken by file download
- Time / Expenses: Changing the billable amount to 0 now updates the Amount to 0 unless this column has been explicitly edited
- Trust In not saving (when receipt number changed)
- User is not able to copy Bank account from the settings
- Adding File Group doesn't update screen
- Creating Contact Role with the name from deleted one causes screen freeze
- Error on Firm License information page
- Change for minimum Opening Dates of entries to support migrations
- Transaction Reminders Tab errors

Release 1.9.90/91/92/93 – May 27, 2025
Enhancement/Change:
- Internal Improvements
  - Improve queue system performance, redundancy and logging

Fixed:
- Soluno Remote expense upload failure, add new timeout setting

Release 1.9.88/89 – May 9, 2025
Enhancement/Change:
- Pop-up to remind of Actionstep brand transition and select new menu

Release 1.9.87 – May 2, 2025
Enhancement/Change:
- Improvements to contact and casefile management in Actionstep integration

Release 1.9.85/86 – Apr 29, 2025
Enhancement/Change:
- Improved Password reset process
  - Users can now reset their password to unlock their account
  - More understandable error messages
  - Users are required to provide any two factors (ie Email, Phone, Authenticator, Secret) to reset their password
  - Reduce password reset requests to the customer support team
- Internal Improvements
  - Performance and DB logging and observability improvements
  - Improve Backend process thread safety with atomic operations
  - Ability to quickly recover from various scenarios
  - Email notifications for backend service

Fixed:
- Chat not working for a subset of logged in users
- Fixed underlying cause of CL/BJ mismatch and PDF errors
- Date calendar control not working for reversal of provisional write off
- Non-admin users get RateGroup API error when rate groups is updated for the company
  - Cannot delete Rate Group history
- Add back missing section of invoice request types along with metrics for them
- Email labels match issue for secondary addresses

Release 1.9.83/84 – Mar 27, 2025
Enhancement/Change:
- Internal code improvements and optimizations to enhance system reliability and maintainability

Release 1.9.82 – Mar 24, 2025
Enhancement/Change:
- More internal improvements to contact management in Actionstep integration

Release 1.9.81 – Mar 18, 2025
Enhancement/Change:
- Improvements to contact management in Actionstep integration

Release 1.9.77/78/79/80 – Mar 12, 2025
Enhancement/Change:
- Internal Improvements to better whether Microsoft system "blips"

Release 1.9.74/75/76 – Mar 04, 2025
Enhancement/Change:
- Internal Improvements
  - Improve queue system performance, redundancy and logging
  - Improvements to reduce load times of reports
  - Monitoring tools, alerts and tools to enable quicker recovery from outage
  - Monitoring and auto-retry attempt for intermittent system errors

Fixed:

- Invoice Adjustment: negative adjustment as discount on hold entry causing issue

Release 1.9.71/72/73 – Feb 12, 2025
Enhancement/Change:

- Improve performance by optimizing read snapshot system waiting
- Improve casefile and contact handling with Actionstep
- Hide group contact creation from file manager with Actionstep
- Add new pipelines to CI/CD

Fixed:

- Operating In/Trust In to load current system date when empty/default snapshot UI
- Typo in reopen contact popup causing error
- Audit Trail Report to include deleted entry linked by file

Release 1.9.70 – Jan 28, 2025
Fixed:

- Rolling back work associated with supporting write offs after billing

Release 1.9.69 – Jan 23, 2025
Fixed:

- Batch Release Check. Crash

Release 1.9.65/66/67/68 – Jan 22, 2025
Enhancement/Change:

- Actionstep Practice Management: Soluno-side ready (pre-release code)
- Server. Phase 1 rework of application to allow for better performing cloud environment.
- Static Lists. Most lists when changed will be sent to all users online so they don't have to log out/in to retrieve updates
- Other internal changes to keep things running smoothly.

Fixed:

- Invoice PDF requests will be abandoned after 30 minutes to allow for "normal" invoice operations to continue; was 180 minutes.

Release 1.9.60/64 – Jan 07, 2025

Fixed:

- Rolling back work associated with supporting write offs after billing
    - Client Ledger/Billings Journal: Remove reports filter treat billing correction as adjustment
    - View/Edit Adj Invoice Screen: Not showing correct amount and causing issues
    - Payment Allocation: Not showing correct split adjustments
- Soluno Configuration: SQL server now must be entered
- Soluno Remote: Initial sync of contacts/casefiles could fail on large data sets.

Release 1.9.59 – Dec 17, 2024

Fixed:

- Client Ledger/Billings Journal: Reports filter should by default treat billing correction as adjustment
- Op/Tr Bank reports: Opening balance not showing value

Release 1.9.57/58 – Dec 16, 2024

Enhancement/Change:

- Recurring Transactions: Ability to set recurring or one-time reminders on memorized transactions with new dashboard section "Upcoming Transactions" that will show on login if any overdue or imminently overdue transactions are available.
- New logo ("Soluno: an Actionstep company") on login screen
- Patches to AngularJS framework (security)
- New adjustment category in Task Codes to support future WriteOff release
- API improvements to support Actionstep integration and other partners integrations
    - New fields on Contacts and Time to support Actionstep integration
    - New options when Actionstep is enabled
- A new token (TOTALSDESCRIPTION_NEWDISCOUNT) has been added for billing.
- Updates to on-premise customers will now fail if Queues setting is not enabled
- New payment type for EFT, now have new "eCheck/ e-transfer" category'

Fixed:

- PST Overpayment causing double adding of amount due.
- GST/PST opening Balances now take line 103(Billings collected),104(Billings adjusted) as inputs and calculate line 105, same for 106,107 and line 110. (Purchases)
- Client group bills now will display multiple files in consolidated pdf correctly.
- Deleted entries will now show correctly on Conflict search
- TAF report is now accessible to non-admins with banking permissions
- Dedicated workers to process browser cache requests (reduce likelihood of full outages)
- Updated AngularJS and other components

Release 1.9.55/56 – Oct 9, 2024
Enhancement/Change:
- Bank Rec: added ability to export CSV of Prior Outstanding grid data

Fixed:
- Tr OUT/Transfer: Available balance now calculates based on entry date
- Bank Rec: Reports now display entries from closed files/contacts
- Transfer: Date now fills with current date on new/empty screen

Release 1.9.54 – Oct 4, 2024
Fixed:
- Op/Tr IN. Receipt number didn't auto-increment properly
- Op/Tr IN. Clients created during memorized transaction didn't show up immediately in help.

Release 1.9.50/51/52/53 – Sep 30, 2024
Enhancement/Change:
- Receipts. Added user control when the sequencing for receipt numbers is updated
- Notification Service. Reworked to increase robustness with the influx of new firms
- Reports. More reports will default views.

Fixed:
- Operating IN. Memorized transactions didn't update AR balance in grid
- Duplicate Window. Didn't launch new window in read-only access
- Logon. Organizations only partially configured weren't available.
- Operating IN. Federal tax processing issue causing posted amount to change from entered
- Memorized Transaction. Unable to delete a saved transaction
- Memorized Transaction. Taxes may not have been processed correctly.

Release 1.9.49 – Aug 26, 2024
Fixed:
- Couple of minor issues with memorized transactions

Release 1.9.48 – Aug 22, 2024
Enhancement/Change:
- Modern Navigation. Duplicate Window icon now on toolbar is now preference
- Duplicate Window. New message to inform users a new window will be created.

Release 1.9.47 – Aug 19, 2024
Enhancement/Change:

- Memorized Transactions. New feature released!

Release 1.9.46 – Aug 16, 2024
Enhancement/Change:

- Modern UX Updated with keyboard friendly side-bar and quick timer menu
- Invoice. Users without Trust Delete permission can adjust invoice trust transfer amount to 0.00
- User Profile. Users can choose font size (small, medium, or large)
- Contact Search. Will now support "Last, First" name searches; last name has to be exact match
- Checks. Stubs now show name/address of selected address (was client) on stubs

Fixed:

- New UX fixes for various browser compatibility.
- TAF. Should now work with electronic billing
- Uploading large time/expense files into the sheets will now show progress properly

Release 1.9.45 – Aug 10, 2024
Enhancement/Change:

- UX Updated with option to revert to legacy look and feel

Fixed:

- Invoice Reports. Users with limited security may prevent invoice reports going to scree (pdf ok)

Release 1.9.43/44 – Jul 30, 2024
Enhancement/Change:

- Batch Check Print. Enable grid menu enabled
- Receivable Report. Added support for custom file/contact data templates
- Bank Rec. Editable grids are no longer sortable
- Bank Rec. New period should now set end date of period correctly
- Bank Rec. Account not remembered after closing the period; assumption is will change account
- Approve Invoice. Trust amount changes blocked for users with no trust access
- Soluno Remote. User can be configured to bypass firm 2FA firm requirements
- Actionstep. Integration Phase 0 ready
- Net Documents. All firm to allow unsafe casefile/contact operations
- Conflict Search. Firm can configure results to withing the range 100-99999 for admins/other
- Other internal optimizations to keep thing running smoothly

Fixed:

- Conflict Search. NetDocuments could return documents for unknown contacts causing crash
- Reopen Close Period. Fiscal end date didn't get set correctly in all scenarios
- Expense Report. Handle security that could cause crash
- Trust Admin Fee. UI could freeze in some scenarios
- Receivable reports. Split billing attachments may show incorrect pdf if no edit access
- API. Entry endpoint had regression preventing data to be output

Release 1.9.41/42 – Jul 17, 2024
Enhancement/Change:
- Internal optimizations to allow data entry to execute faster (in most scenarios)
- Some bank reconciliation grids are no longer sortable to prevent data corruption
- Bank reconciliation end date should now default to the date entered during selection
- default definitions added to more reports
- support for expressions and custom fields now available on more reports
- Other internal fixes and optimization in preparation of Actionstep integration

Fixed:
- Multiple receipts generated during a billing cycle could generated the receipts incorrectly
- Report expressions is now case insenstive

Release 1.9.40 – Jun 25, 2024
Fixed:
- Minor fix

Release 1.9.39 – Jun 23, 2024
Enhancement/Change:
- Dashboards. In most situations dashboards should load much quicker
- Other internal optimizations to keep thing running smoothly

Fixed:
- Mass Close File. Menu option could appear for users without delete permission
- API. Entry endpoint had regression preventing data to be output

Release 1.9.38 – Jun 11, 2024
Enhancement/Change:
- Academic accounts. Chat should no longer be shown
- Bank Rec. Account is now remembered between sessions

Fixed:
- Trust Avail Balances. On split files, may not show correct balance for split contacts
- GL Reopen Period. If opening past a year end, next eoy may not get set
- Close File. May not process "allow files with unbilled time" to be closed flag corretly

Release 1.9.37 – Jun 7, 2024
Enhancement/Change:
- Mass Close Files. Optimized for performance
- Optimized File/Bank validate to run smoother

Fixed:
- Ledes 2000. Expenses without description would prevent creation of file (required field)

Release 1.9.36 – May 23, 2024
Enhancement/Change:
- Mass Close Files. New feature now available
- Internal changes to make things run smoother for our integration partners

Fixed:
- Conflict Search. NetDocuments could return thousands of matches; we now stop processing beyond what can be reported.
- Approve Invoices. Preview mode stopped working after last release

Release 1.9.35 – May 15, 2024
Fixed:
- Held Emails. A contact with restricted contact access may get exception
- Email Invoices. Users could receive error during invoicing

Release 1.9.34 – May 9, 2024
Enhancement/Change:
- New Contact. A contact no longer requires a case to be added to be considered a client
- New Contact. Option to automatically create/assign contact numbers; hide number on screen
- API. New contact endpoint to create a contact from a name+address only.

Release 1.9.33 – May 7, 2024
Enhancement/Change:
- More Internal changes to allow partners to launch Soluno in a trusted fashion
- Entries. Entry amounts from various sources are now rounded to the currency of the firm
- Client WIP… View. Added file referral source summaries
- Rate Groups. Now Sorting/indenting in help lists
- Closed Periods. Removed ability to delete opening balance period
- General Journal. Added ability to delete all rows.
- Ledes 2000/2.0. Added filegroup setting to default Matter Final Bill setting (if not specified)
- Time View. Template shipped with no summaries; requires firm create definition to link

Fixed:
- Trust View. Small tweak to check for security issues after all filtering performed
- Vendor Ledger View. Changes to surface security issues when running with restricted access
- Ledger View. Originating bank and reference number now available for Trust entries
- Invoices. Entries with trailing new line characters in description could causes spacing issues.
- Time Sheet. Timers ran "oddly" when no file was provided on the row

1.9.31/32 – Apr 24, 2024
Fixed:

- Deposit Slip. Crash if days entered was too large
- Ledger View. Transfers with both a check and receipt would not show receipt attachment
- Casefiles. Changing primary contact may lead to difficulties recording payments/adjustments
- System changes to help with partner integrations

1.9.30 – Apr 10, 2024
Fixed:

- Dashboard-File. Trust balances didn't always show correctly

1.9.29 – Apr 9, 2024
Fixed:

- Trust Release. Crashes under some scenarios
- Internal fixes

Release 1.9.28 – Apr 5, 2024
Fixed:

- Security. Some users could not log in after previous release
- Bank Rec. Drag and Drop in Receipts vs Deposit tab failure
- Internal fixes

Release 1.9.27 – Apr 4, 2024
Enhancement/Change:

- Internal changes to allow partners to launch Soluno in a trusted fashion

Fixed:

- CORS. Some sights could not access API from their web pages
- Invoice PDFs. Optimized combined PDF merging…should be a little faster for some users.
- Duplicate Session. Closing cloned session could lead to user to not be registered active (rare).
- Internal fixes

Release 1.9.24/25/26 – Apr 1, 2024
Enhancement/Change:
- Settlement Statement. Better support for tax adjustments; some title changes
- Settlement Statement. Removed trust closing line when invoice specified
- Duplicate Session. Internal improvements to make it work consistently
- Views. Added version number to completed selection line

Fixed:
- Internal fixes

Release 1.9.23 – Mar 21, 2024
Enhancement/Change:
- Actionstep: Support for Actionstep's time export
- Trust Hold: Hold can now be applied to specific trust in types (drafts, eft, cash, etc.)
- Soluno Remote. New generic time import plug-in
- Casefile Contact Re-assign. Smarter logic to process invoices tagged with original contact.
- Third-party packages updated

Fixed:
- Static Lists. Deleted entries should no longer be shown
- Soluno Remote. Tax on expenses could be set incorrectly
- Check Printing. Bank accounts without address could crash if related address tokens used
- Other minor fixes to keep things running smoothy

Release 1.9.21/22 – Feb 15, 2024
Enhancement/Change:
- Conflict Search: Closed files/contacts now show as "Closed"; was "Deleted"
- Request Invoice. Determine Billable Status. Grid changes to use checkboxes and filters
- Trust Bank View. New token _TRUSTENTRYRAW_ for use with integration partners
- Firm Information. Button added to clear browser cache.
- Settings. Ability to remove contact print/email defaults
- General. Added x-robots-tag header to pages so that search engines will not index sites
- Bank Rec. Grids will now show totals in footers

Fixed:
- TimeSheet. Timesheet not available when upgrading from earlier versions
- New Contacts/Files. Under very rare situations two users can overwrite the other user's info
- Bill Display. Icons should no longer get removed when deleting a bill display
- Invoice Summary. Custom format. Using <draft> and <finalize> tags could lead to blank pages
- Static Lists. Added tests to ensure static item isn't in use before allowing deletion
- Static Lists. Deletion of an item now performs a soft delete
- View Drilldown. Returning from drilldown should no longer hide the refresh button
- PDF Engine. Updated 3rd-party package to address pdf pages being dropped randomly
- Deposit Slip. Prevent entries from a different account from being added to deposit slip
- Rate Groups. Description not always shown when adding new rates
- Payable. Edit would delete the pad attachment upon save; without formally deleting.

Release 1.9.20 – Jan 30, 2024
Enhancement/Change:
- Browsers: Using new Clear-Site-Data header to automatically clear a browser's cache

Fixed:
- Soluno Remote: small change to handle missing tax settings in import expense files

Release 1.9.19 – Jan 27, 2024
Enhancement/Change:
- Google/Gmail: Changed connector - THIS REQUIRES REAUTHENTICATION BY FIRM
- Templates: Expressions now support the CultureInfo class
- Financials/Security: Totals will now include entries a user can't normally view. Entry details are not available on the General Ledger for users who cannot view all entries.

Fixed:
- Reopen file. "Other Contacts". If same as client, the other contact line is removed
- Adjustments/Provision Adj. Wasn't factoring re-allocation entries when pro-rating fees changes

Release 1.9.18 – Jan 24, 2024
Enhancement/Change:
- Google/Gmail: Changed connector - THIS REQUIRES REAUTHENTICATION BY FIRM
- Time/Fees: You can now configure flat fee amounts in rate groups; time entry uses.
- Payables/PDF: Better support for PDF files
- Views with Top Client Summaries: Summaries now shows the responsible lawyer
- Receivable View: New option to calculate end date by "don't include recent invoices by days"
- Receivable View: "Today" is now defined as the date in the top-right; for aging.
- Leger Views: Three new casefile referral summaries (by user, source, and contact)
- Close File/NetDocuments: ability to disconnect ND during close file (keep open in ND)
- Other internal changes to make operations smoother

Fixed:
- Payables. Editing payables now allows for deleting/switching attached PDF attachments
- New File. Automatic "Use Today for open date" feature didn't work under rare situations
- Browsers: removed a number of console messages to aid in diagnosing issues

Release 1.9.17 – Jan 17, 2024
Fixed:
- Invoices: Logos removed from output; reverted 3rd party html package

Release 1.9.15/16 – Jan 16, 2024
Enhancement/Change:
- View/Reports: Start and End dates are no longer stored with user/custom views
- Receivable View: Now uses the system date from the browser for aging from "today"
- 1099. Now generates a CSV file that can be used to aid in creating portal files
- Updated copyright to 2024
- Other internal changes to make operations smoother

Fixed:
- Conflict Search. NetDocuments could return partial data that caused crash
- Payables. Will check for outstanding rounding issues

Release 1.9.14 – Dec 8, 2023
Enhancement/Change:
- Contact Help. split-contacts will show in help lists in addition to the client when a casefile in in context. Money In, Adjustment, and direct expense charge are some places this benefits
- Client View. Top clients views now show responsible lawyer where possible
- New Contact. Creating a new contact now only requires create permission
- Casefile/Contact. A number of internal optimizations to make things a little quicker

Fixed:
- Settings. Default check setting works again
- New Casefile. Automatic assign file number feature works again
- New Contact. Vendor arrangements were not saved
- Quick Entry/Time. Browser console error with regards to LevyType fixed

Release 1.9.13 – Dec 5, 2023
Fixed:
- Bank Accounts. Reopening a bank account with security set
- Integrations. Crashes leading to better support for creating casefiles via integrations

Release 1.9.12 – Dec 4, 2023
Enhancement/Change:
- Cases/Contacts/Split Billing. Now support groups that can contain groups leading to scenarios where the same contact is referenced multiple times.

Fixed:
- Bank Rec. Trust Listing report may show incorrect balance in some split billing scenarios.
- Casefile Reopen. If a closed file referenced a data template that has been deleted or modified then an error trying to save could occur.
- Other internal fixes to keep things running smoothly

Release 1.9.10/11 – Nov 30, 2023
Fixed:

- GoVeyance Integration. Adjustments to handle some data inconsistencies.
- Admin File Settings. You can now remove default groups
- Bank Accounts. Re-opening deleted accounts works again

Release 1.9.9 – Nov 28, 2023
Enhancement/Change:

- Invoicing. U.S. firms with French clients are now supported.

Fixed:

- Labels and other reports without report headers now work again
- Invoicing. With receipts printed enabled, billings journal shows duplicate payment amount
- Invoicing. Releasing/finalizing from request screen with auto trust transfer enabled
- Audit Trail. Extra audit trail entries may be produced; affects payable processing.
- Other minor internal issues

Release 1.9.8 – Nov 20, 2023
Enhancement/Change:

- Ledes 98B. Tax handling. Activity codes per tax type now supported
- Admin Security. List boxes are now sorted

Fixed:

- Ledger View. Security. Time entries could incorrectly hide amount/rate on responsible files.
- Ledger View. Security. If time amount/rate is hidden, security message wasn't displayed

Release 1.9.7 – Nov 17, 2023
Fixed:

- Ledes98B/BI: processing splits didn't process fields encoded with "split:"
- Payables. Taxes could cause rounding issues leading to paid invoices to be shown
- Third party packages updated

Release 1.9.6 – Nov 14, 2023
Enhancement/Change:

- Ledger View. Option to sort be date in descending order.

Release 1.9.5 – Nov 8, 2023
Enhancement/Change:

- Net Documents. No longer supporting Folder mode
- Net Documents. Option to strip client prefix on case files before sending to ND
- Setting. Setting the currency symbol to "???" will remove the symbol being shown

Fixed:

- Net Dcouments. When closing a file, the description could get removed
- Security. Users with just file create access (without edit/view) couldn't create a file
- Ledger View. Client information may not be shown under some circumstances
- Other internal minor fixes to keep things running smoothly

Release 1.9.1/2/3/4 – Oct 30, 2023
Enhancement/Change:
- Security. Many internal changes to keep your data safer!
- Security. New report options for ledger views:
    1. Force working lawyer
    2. Ignore file security restrictions (when force working lawyer used)
- Security. New report options for invoicing views:
    1. Force credit lawyer
    2. Ignore file security restrictions (when force credit lawyer used)
    3. Restrict what "other" credit lawyer's information can be viewed
- Customization/Security. Hide menu items. Can help keep the UI cleaner but contents could still be accessible by other menu items or via an integration.
- Infrastructure. Many internal changes to keep the system responsive
- Ledes98. Alternate methods of handling tax now available
- Bank Rec. Trust listing now only shows balances; cleared/outstanding columns removed
- Receivable/Payment/Adjustment views. New tokens: CASENOTESFIRST, CASENOTESLAST, CASENOTESALLDESC, CASENOTESALLASC.
- Packages. Many third party modules updated

Fixed:
- File Manager. Optimized some networking calls to improve performance.
- File/Contact Managers. Rename with some special characters addressed
- Ledes98BI. Processing of a user's first and last name
- Time Entry. Amounts now rounded to 2 decimals
- New Contact/File. Next number shown will now skip previously closed numbers (if encountered)
- Invoices. If fee/expense entries were processed but not shown, space could still be consumed

Release 1.8.58 – Oct 24, 2023
Enhancement/Change:
- API/Integrations. More filter options for time entry retrieval

Fixed:
- Invoice Approval. Select charges. Disabled the ability to disable automated entries.

Release 1.8.56/7 – Oct 20, 2023
Enhancement/Change:
- Check templates. Tokens for firm information now available

Fixed:
- Ledger View. Wip Billing layout (referral). Titles updated.
- Ledger View. Top XX reports now honour start date correctly
- Bank Rec. Report: "Actual Bank Journal" title now correct

Release 1.8.55 – Oct 11, 2023
Enhancement/Change:
- Ledger View. Cleaner report selections

Release 1.8.52/53/54 – Oct 10, 2023
Enhancement/Change:
- Rate Groups. Improved Excel export functionality

Fixed:
- File Manager. Invalid data being saved messaging
- Payable Entry. PST Remittance now correctly updates grid and tax paid fields

Release 1.8.50/1 – Sept 20, 2023
Enhancement/Change:
- Ledger View. New reports for Client Wip Billing and Collection
- Password Reset. Enhancements to UI to make things easier

Fixed:
- Various Views support "Top X" lists: few minor fixes.

Release 1.8.49 – Aug 28, 2023
Enhancement/Change:
- CarpeDiem. Added support for Activity Status
- Check Templates/MICR. New token for combined "transit-institution"

Release 1.8.46/47/48 – Jul 27, 2023
Enhancement/Change:
- iManage. Added support for Activity Status
- Help Lists. Default item count in list changed to 40
- Soluno Remote. Add support for IsTaskBasedBilling SolunoRemote
- Cash flow dashboard. Optimized retrieval of backing data…should be faster.
- Bank Accounts. Support for an address. Address can be added to check templates
- Ledger View. Users without vendor access can see entries from trust in/out. Vendor names are replaced with vendor numbers for reference
- Logon. Improved reset password flow
- User Preferences. Can now set a default for money out check handling (request, release, etc.)

Fixed:
- Bank Rec. First time initialization may not have marked all prior entries correctly
- New Contact/Casefile: certain valid characters were not being processed in names; plus sign.
- Views/Excel. Embedded html in footer sections not properly scrubbed.

Release 1.8.45 – Jun 27, 2023

Enhancement/Change:

- Time View. Now supports Date Descending
- Contingency. Various minor tweaks to allow for expanded billing templates; requires support

Fixed:

- Invoicing. French. May not have generated.
- Views. Save View. Public setting didn't always show correct state
- Ledger/Payment/Receivable Views. Not always possible to save a new custom view.
- File Popup View. Overwritten billing arrangement values not always labeled correctly

Release 1.8.44 – Jun 21, 2023

Enhancement/Change:

- Payment View. Top Client summary added
- Ledger Views. Various optimization to improve performance
- API. Time endpoint now supports batch reading of time entries
- Security. Some labels changed to improve clarity
- Contingency. Some settings were hidden until feature fully ready
- Trust/Operating views. Now supports Date Descending sorting
- General Journal View. Now supports Date Descending

Fixed:

- Money Out. Editing a request with Force request printing enabled failed
- Ledger Views. Has Trust Balance tests now does per account checking; was overall trust balance
- French Invoices. Some text updates
- Other internal changes to make things run smoothly

Release 1.8.42 – Jun 7, 2023

Enhancement/Change:

- Bank Rec. Various optimization to improve performance

Fixed:

- Financial Statements. Outputting directly to Excel would lose information
- General Journal. Editing an entry didn't preserve the reference number
- Casefile Info. Closed file information hidden for active files
- Views/Top Summaries. Only 1 contact from a group with the same value were shown
- Other internal changes to make things run smoothly

Release 1.8.40/41 (10248) – May 11, 2023
Enhancement/Change:

- Client View. New top client list: Unbilled Fees
- Client View. New top client list: Totals Fees
- Client View. New top client list: Unbilled Expenses
- Client View. New top client list: Total Expenses
- Client View. New top client list: Trust Balance
- Receivables View: New top client list: Billed Fees
- Receivables View: New top client list: Totals Billed
- Receivables View: New top client list: AR Balance
- Templates. New expression evaluator available using {_EXPRESSION_E: … }

Fixed:

- Billing Realization: various minor tweaks
- Contact View. Roles token not rendering correctly in PDF
- Expense View. Request checks would show if no start date provided
- Transfer Screen. Invoice Help could show incorrect contacts/balances for split file
- Adjustment Screen. Duplicate invoice numbers now handled suing (#) suffixes.
- GL Budgeting. Parent/Child nesting fixed
- Contact View. Removed legacy "Exclude on hold files" filter

Release 1.8.39 (10248) – Apr 27, 2023
Enhancement/Change:

- Time View. Changed effective rate calculation to avoid rounding issues
- Time View. New token for entered rate (vs calculated)
- Invoice. New token: _BILLINGLAWYERSHORT_; initials of responsible lawyer

Fixed:

- Ledger View. Via drilldown may not show time/fee entries
- Transfer. Deleting. Security could preventing sub-entries from being removed
- Saskatchewan: Default taxes category wasn't initialized correctly
- Ledes 2.0. Partner record now uses last and first name fields of user
- Bank Rec. importing prior outstanding receipts failed
- Other internal fixes to make things run smoothly

Release 1.8.38 (10224) – Apr 13, 2023
Fixed:

- New Contact: New Vendor could freeze if next vendor number can't be found
- Invoicing. Changing trust transfer amount could cause amount to double
- Other internal fixes to make things run smoothly

Release 1.8.37 (10217) – Apr 12, 2023
Fixed:

- Could not disable a user you couldn't fully administer
- Ability to set user classification and/or licenses didn't always work

Release 1.8.35/36 (10214) – Apr 11, 2023
Enhancement/Change:
- Ledger. Added WIP+AR+Trust view as a default
- FattMerchant. Removed as a supported credit card vendor
- Other internal behind-the-scenes changes to keep things running smoothly

Fixed:
- Other internal bugs got squashed before they got released

Release 1.8.33/34 (10180) – Mar 31, 2023
Enhancement/Change:
- User security. Users belonging to multiple accounts are now categorized so that only administrators can only manage appropriate settings
- Users.   Full Name now broken out to first name and last name; only needed for Ledes
- Contact/Invoicing. Ability to disable re-use invoice number per contact.
- Packages. Lots of 3rd party updates applied.

Fixed:
- Payment View. Introducing filter could include recently deleted users from files
- Other internal bugs got squashed
- Invoice. Next available invoice number may not show up.

Release 1.8.31/32 (10146) – Mar 27, 2023
Enhancement/Change:
- Bank Rec. Import prior outstanding entries now supports more file formats
- Ledger View. Ability to filter by Billable and/or non-billable fees
- Billing Realization. NEW view.
- GL Budgeting. Many enhancements based upon feedback of preview build
- LawToolBox. Switching to opening inside Soluno vs new tab
- Contact View. Ability to filter by hold status
- Settings. Default Interest Group hidden (until we have interest fully developed)
- New Contact. Removed "Cancel" button when selecting stream.
- Held Emails. Ability to perform mass delete.

Fixed:
- Contact Manager. Multi-line field in data template could not be edited.
- Invoicing. Receipts Up to date would stop working if retainers not included
- LawToolBox. Threading issues addressed
- Excel. Adjustment, Payments, GJ, and Deposit slip views didn't work correctly
- Contact Cover. Duplicate signature line
- LawPay. Workaround for events/payments made to "loan" accounts in data feed
- Past Due. Sorting by invoice may show empty report; data dependant.
- Ledes 2000. Attempt to handle flat fee only invoices; rate unknown; not sure correct solution

Release 1.8.30 (10025) – Feb 24, 2023
Enhancement/Change:
- Trust Hold. Checks not performed on existing dates once deactivated
- Trust Hold. Date now shown in File Manager/Info; admins can edit
- Invoicing. File on hold or on credit hold no longer prevents invoicing
- Transaction Levy. Using Quick expense a user can now specify levy type

Fixed:
- Conflict Check. Going forward, receivable data will not be included
- Settlement Statement. Fees were doubled up after last build
- Idle Timeout. Users whose session disconnect/connect often may show as active when not

Release 1.8.29 (10008) – Feb 22, 2023
Enhancement/Change:
- Connected Users. Admins can now send short messages to users
- Invoicing. Summaries can now be created from totally blank for total customization.
- Invoicing. Contact Cover subject line tokens: _DATERUN_SHORT_ and _DATERUN_LONG_
- Invoicing. "Receipts Up To" date cant be set earlier than pervious invoice; unless not included
- Invoicing. Discounts are now tracked per attorney in the Fee Summary
- Invoicing. Option for time entries using an adjustment task to be treated as discounts
- Invoicing. Bank Recs no longer stop transfer activity
- Receipts. Receipts can no longer pay invoices dated after the receipt.
  Operating retainers possible in automatic mode.
- Checks. Printing would fail if user didn't have full view access; now ledger or full works
- Invoicing/Ledes. Users can be configured with 3 titles that can be used through File Groups
- Ledes 2.0. The root tag can now be configured
- Ledes 98BI. Tax categories can now be configured in tax groups
- Payment View. New AoL summary using current AoL; old was by AoL at invoicing time
- Bank Views. New token for deposit slip for when "Run as printed" isn't enough
- Idle Timeout. Browser alert is no longer used
- Idle Timeout. Can now be configured with a max of 12hrs; max 6 recommended
- Idle Timeout. As approaching timeout, warning shown asking user to click to let us know active
- Servers. New monitor service to detect stopped main site
- Deposit Slip. Date title changed to reflect the date is the entry date of the slip
- Security. Text changed from "delete" to "close" for contacts and file permissions
- Other internal issues to make things run smoother

Fixed:
- Close File. Close button disabled if user has security applied to balance records
- Invoicing. Updating transfer amounts could fail if user didn't have full view permission to banks
- Reports. Long running reports may not be shut down in a timely fashion

Release 1.8.28 (9961) – Feb 6, 2023
Enhancement/Change:
- Receivable Views. Canada. New templates shipped with longer invoice field, but loses splits
- Ledger Reports. New extended bank status token showing payment method.
- Ledger Reports. Default ledger templates now use extended status token
- Billing Display. Hiding retainer section now clear that doesn't include payments/adjustments

Fixed:
- Ledger Reports. Bank account filter not applied correctly in some areas

Release 1.8.27 (9951) – Feb 3, 2023
Enhancement/Change:
- Connected Users: Icon changed to log off; was trash can
- Connected Users. More user events are now registered as "active"
- Ledger Reports. Option to included closed files
- Ledger Reports. Master definitions for trust and summary now include closed files
- Expense Reports. Billing adjustments now show as a source of AR; was EX
- Expense Reports. New "By Source" summary
- Expense Reports. Posting reference summary now shows all references; was just soft costs
- Notifications. Refresh button will now recycle connection before retrieving notifications
- Export Reports. User is now limited to one at a time to avoid the firm's DB being overwhelmed

Fixed:
- Financials. Entries requiring the lookup of old invoices could cause internal crash
- Close File. If "ignore unbilled time" enabled and only current work was time you couldn't close
- Expense Reports. Did not process the "type" filters correctly
- System. Some failed server requests could leave the system with a blocked UI
- Other behind the scenes improvements

Release 1.8.25/26 (9928) – Jan 26, 2023
Enhancement/Change:
- Connected Users: Firms can now set the idle timeout for users

Fixed:
- Connected Users. Disconnecting one user may disconnect all users in the firm

Release 1.8.24 (9922) – Jan 26, 2023
Enhancement/Change:
- Connected Users: New Connected User feature with ability for admins to force disconnect
- Connected Users: Inactive users will be automatically disconnected after normal working hours
- Financials: If server error encountered will now return empty report
- Financials: A user is limited to running one financial report at a time
- Financials: A user cannot run a financial report while a period is being closed
- Internal: Ability to suppress menu items by group; developer supported
- Other internal changes to make the program run smoother

Fixed:
- Bank Rec. Trust could fail if user was forced to specify a file or contact with ledger reports
- Add Payable. Hold flag not always shown correctly

Release 1.8.23 (9901) – Jan 20, 2023
Enhancement/Change:
- Internal optimizations

Release 1.8.22 (9894) – Jan 17, 2023
Enhancement/Change:
- Internal optimization to make browser-server communications better for reports

Release 1.8.21 (9884) – Jan 11, 2023
Enhancement/Change:
- Conflict check. Responsible lawyer will now show on entries with single file
- Closed File. Location now on default view
- Invoicing. parameter added _CLIENT_EXTRABILLINGADDRESSES_; string for prefix on attentions
- Invoicing. _TOTALSAMOUNT_NEWHOURS_ token added

Fixed:
- Close File. Destroy date now showing correctly
- Financials. Tweaks to improve performance.
- Financials. Logging capability added to allow monitoring of performance and activity
- GL Budget. Month control now initializes better

Release 1.8.20 (9867) – Jan 5, 2023
Enhancement/Change:
- GL Budgeting. Title now shows (preview) to indicate reports are still a work-in-progress

Fixed:
- File Opening Balance. Operating retainers, once added, couldn't be removed.
- Financials/PL. YTD numbers don't always show correctly
- Conflict check. Responsible lawyer not showing on files/contacts
- Other internal fixes to make the system run smoother

Release 1.8.19 (9855) – Jan 3, 2023
Enhancement/Change:

- Copyright. Updated 2022 to 2023

Fixed:

- Journal Import. Amounts in import file not surrounded by quotes could fail
- Financials/EOY. Incorrect Retained account could be used
- Financials. Reports may just show "selections" if another user runs a report.
- Financials. TBAL/BS may show incorrect numbers for firms with > 100K entries in one account

Release 1.8.18 (9845) – Dec 22, 2022
Fixed:

- Invoicing French. French language file got corrupted

Release 1.8.17 (9842) – Dec 22, 2022
Enhancement/Change:

- Receivables View. Minor performance optimization applied for firms with large data
- GL Budget View. Change and % columns hidden on default year template

Fixed:

- Close Period. Reopening first closed month could cause reporting issues
- General Ledger. Running detailed GL with an account having more than 20,000 entries crashed
- PL. Balance Sheet accounts appeared in income section
- Quick Entry/Time. System setting for rounding hours not correctly applied
- System Defaults. Not having a default tax group could cause various UI issues.
- Internal annoyances addressed

Release 1.8.15-16 (9830) – Dec 19, 2022

Enhancement/Change:

- Financials: Major performance enhancements
- GL Budgeting (Beta): Initial release of GL Budgeting reporting
- Operating Money IN: Force payment as retainer now an option
- Ledes 2.0: Support for lf_memit_address tag via File Groups
- Invoicing: _FEESUMMARY_ and _TASKSUMMARY_ tokens added
- Administrative Export Items: popup selection dialog now has sorting and filtering capabilities.
- On-prem: ability to tune how temporary report data is stored

Fixed:

- Closed Contact. Additional details when close fails to help determine reason.
- Bank Rec. Editing entry from prior to conversion would lead to new entry appearing

Release 1.8.14 (9780) – Nov 29, 2022
Enhancement/Change:
- CMPA: support for = sign in casefile number
- File Group/Invoice. Setting to never summarize activity codes; ignore/override activity setting
- File Group/Invoice. Option for START_DATE token to use 1st of month of earliest charge
- File Group/Ledes. Many options to allow for better control over ledes file output
- Tax Group/Ledes. Many opttions to allow for better control over ledes file output
- Statements. Sort by invoice now supports invoice numbers with non-digit characters
- Ledger. Sorted by Resp->Contact Name will now generate page breaks after each resp
- 3rd-party packages updated

Fixed:
- Switching books could lose check management setting
- Conflict Check. Would rebuild casefile cache when unnecessary
- Contact Report. Prevent delete icon from displaying when user does have rights
- Users/LawToolBox. User LTB warning shown when LTB not enabled

Release 1.8.13 (9740) – Nov 23, 2022
Fixed:
- File Manager. Users without delete/close rights got an incorrect access error message

Release 1.8.1-12 (9734) – Nov 22, 2022
Enhancement/Change:
- Closing and re-opening Files/Contacts now supported
- NetDocuments support for closed file date added
- LawToolBox integration now supported
- Conflict Search performance greatly improved
- Invoicing. Hidden fees section but with a description only entry configured will show the entry; other time entries will not be shown.

Fixed:
- Switching books could lose check management setting
- GL Opening Balance screen was not handling PST correctly
- Other fixes and under the hood changes to keep things running smoothly

Release 1.7.98 (9589) – Nov 4, 2022
Enhancement/Change:
- Statements. Sort by invoice. matter numbers, if unique to the invoice number, can be shown
- Tax Groups. Name now supports up to 500 characters and spaces; needed for Ledes support
- File Manager. Staff section and main responsible lawyer behavior changed:
    1. Changes from within the staff section will no longer update other roles
    2. Changes from within the staff section should not update introducing percent
    3. Staff section grid improved
    4. Main responsible lawyer changes still update other roles
    5. Main responsible lawyer changes will transfer introducing percent if new resp is zero.

Fixed:
- Invoice. Billing address token could cause exception in some configurations
- Users. "Show in Help". Status may not have been honored in all scenarios

Release 1.7.97 (9582) – Sep 30, 2022
Fixed:
- EFT. Threading issues may cause inconsistent crashing
- Invoicing. Appling discount when there are more then one user having "don't reapply fees"
- Invoicing. User without trust access making a change to a time entry for an entry on an invoice in the review/release stage will have the trust available/applied reset to zero

Release 1.7.96 (9573) – Sep 26, 2022
Enhancement/Change:
- Invoicing. Expressions can now convert raw dates to locale (U.S., Canada, etc.)
- Invoicing. New tokens available to retrieve firm, browser/user, or contact locale.
  _FIRM_LOCALE_, _FIRM_LANGUAGE_, _CLIENT_LOCALE_, _CLIENT_LANGUAGE_,_USER_LOCALE_
- Clone Soluno. New method used that should address inconsistent launching
- Billable Status (from request invoice). Grids can now be exported
- Chat. Applied branding and addressed some issues found during testing
- Soluno Branding. The Soluno Blue and Soluno Orange have been updated
- Other internal changes to make things run smoother

Fixed:
- Copitrak template to support casefile field mappings
- Conflict Check. Time entry/Fee Earner text showed user who made the entry vs entered lawyer

Release 1.7.95 (9537) – Sep 15, 2022
Enhancement/Change:
- Nacha. New EFT attribute: EFTFileCounter2
- Soluno Remote. Support for Trim of output fields
- Banking Dashboard. Bank balances now includes TODAY; was end of yesterday.
- Chat. Replaced with Intercom chat and moved to toolbar

Fixed:
- Invoicing. Tax exempt, state/provincial, etc. now localized for U.S. states

Release 1.7.94 (9488) – Aug 31, 2022
Enhancement/Change:
- NetDocuments. Support for their Canadian data center
- NetDocuments. Will now skip non-critical sync errors; previously stopped on first error; all errors surfaced in notification for review
- NetDocuments. Ctrl + Re-Authorize -> performs quick resync using current settings
- NetDocuments. Ctrl + Shift + Re-Authorize -> performs full resync using current settings
- CarpeDiem. Support task code override
- Trust Ledger. Changed setting to include files with transactions (vs balance). Slower.
- Ledger Views. Optimization to reduce the amount of data that needs processing.
- Settlements. Entries Up To and Receipts Up to for single invoice now uses original dates
- Expressions. Extensions added for dates to Add/Subtract days, months, years on raw dates
- Invoicing. RAW date formats (YYYYMMDD) can now be output for date tokens: _CASEFILE_LASTBILLEDDATE_RAW_, _DATE_RAW_ENTRIESUPTO_, _DATE_RAW_BILLINGFIRSTCHARGE_
- Self-hosting firms: can run local databases in unencrypted format; requires configuration.
- Time Sheet. Data import will now ignore blank entries
- Various 3rd party package updates

Fixed:
- Invoice with many thousands of entries may not link the entries to the invoice correctly
- Payments on invoice with tax adjustments may not calculate correctly
- Timesheet would not save any entries if one was invalid
- Other minor items like spelling corrections and partner ids

Release 1.7.93 (9418) – Jul 20, 2022
Enhancement/Change:
- Report Export. Fields with html tables handled better
- Case File Groups. Option to redirect email/print on invoices to billing contact on the file
- Audit Trail. Deleted invoices will now show who deleted it; in () beside status

Fixed:
- Cosmetic spelling issue
- Payment Report. Selecting and showing only a single credit lawyer could show incorrect date
- Contacts. Could not add email and set communication preference to email in one step
- Ledes BI / Ledes BI V2. Header line reversed

Release 1.7.92 (9400) – Jul 11, 2022
Enhancement/Change:
- Contacts. Billing emails now supported; multiple emails many now be set per contact.

Fixed:
- Cleaned up focus issues in 2FA logon screen
- Heatmap. No longer dependent on overview security setting (in rare scenarios)

Release 1.7.91 (9393) – Jun 29, 2022
Enhancement/Change:
- Ledes BI V1. Now supported
- Ledes. Firm ID can be overwritten in file groups; default still system setting
- Ledes. Users now have 3 Ledes ID with the actual one used configured via file groups
- Receivable Views: 9 new summaries available: Area of Law by (Billings, Firm Summary, or Lawyer Summary) where the lawyer can be one of collecting, responsible, or credit
- Request Check. No longer requires admin override; release check still does

Fixed:
- Cleaned up focus issues in 2FA logon screen
- CVS output. Header line is now output.
- Contact would not display in Contact Manager if associated role used was deleted
- Group contact button still available in New File even if address requirements enabled

Release 1.7.90 (9367) – Jun 14, 2022
Enhancement/Change:
- Usage screen. Export feature added
- 2FA logon. Screen re-worked for improved experience
- Billing Display: tokens: _CASEFILE_LASTBILLEDDATE_LONG_, _CASEFILE_LASTBILLEDDATE_SHORT_, and _CASEFILE_LASTBILLEDINVOICENUM_ added

Fixed:
- Receivable/Payment/Adjustment/Productive Views. Now honor contact/file security
- Rates. Non-Fee earners may not have been able to see all rates under some circumstances
- Bank Rec. Trust. Users forced to enter file/contact on ledgers couldn't produce Trust List

Release 1.7.89 (9338) – May 25, 2022
Enhancement/Change:
- Template Expressions. Now supports { and }; not { and } – supports more advanced coding
- Split Billing. Negative percentages now blocked from entry
- Bill Display. _MAINCLIENT_NUMBER_ token added; not redirected to contact for billing address
- Bill Display. _TOTALSDESCRIPTION_CCLIST_ token added
- Soluno Remote. More robust logging
- Copied Org. Better re-registration support

Fixed:
- Split Billing. Percentages = 0.01 not processed
- Conflict Search. Searching for words with natural period now preserved (no spaces)
- Check Printing. Branch Name now outputs correct information
- Check Printing. Non-MICR tokens still encoded dash ('-') to 'D' for some fields
- Ledes 2.0/2000. Address fields now process ampersand and other characters.
- Approve Invoice/Select charges. Deleted activity codes could prevent dialog closing
- EFT. Vendor name now shown correctly
- Bank Rec. Reset Bank Feed now works
- Settlement Statement. Somes taxes may not have been calculated correctly.

Enhancement/Change:

- LawBase. Start of integration support

- Settlement Statement. Signature token will now use responsible lawyer's signature
- Billing Display. If fee summary section includes the total token, then total section removed
- Billing Display. Fee/Task Summaries. Now supports working lawyer
- Billing Display. Fee Summary now honors Billing Order specified in casefile
- Billing Display. New Billing Arrangement tokens:

  _CASEFILE_BILLARRANGEMENT_GENERAL_CONTINGENCY_
  _CASEFILE_BILLARRANGEMENT_GENERAL_ESTIMATETOTALCHARGES

  _CASEFILE_BILLARRANGEMENT_FEE_FIRSTFLATAMOUNT_
  _CASEFILE_BILLARRANGEMENT_FEE_FIRSTTARGETMIN_
  _CASEFILE_BILLARRANGEMENT_FEE_FIRSTTARGETMAX_
  _CASEFILE_BILLARRANGEMENT_FEE_SUBSEQUENTFLATAMOUNT_
  _CASEFILE_BILLARRANGEMENT_FEE_SUBSEQUENTTARGETMIN_
  _CASEFILE_BILLARRANGEMENT_FEE_SUBSEQUENTTARGETMAX_
  _CASEFILE_BILLARRANGEMENT_FEE_MAXIMUMFEECHARGES_
  _CASEFILE_BILLARRANGEMENT_FEE_ESTIMATEFEECHARGES_

  _CASEFILE_BILLARRANGEMENT_EXPENSE_FIRSTFLATAMOUNT_
  _CASEFILE_BILLARRANGEMENT_EXPENSE_FIRSTTARGETMIN_
  _CASEFILE_BILLARRANGEMENT_EXPENSE_FIRSTTARGETMAX_
  _CASEFILE_BILLARRANGEMENT_EXPENSE_SUBSEQUENTFLATAMOUNT_
  _CASEFILE_BILLARRANGEMENT_EXPENSE_SUBSEQUENTTARGETMIN_
  _CASEFILE_BILLARRANGEMENT_EXPENSE_SUBSEQUENTTARGETMAX_
  _CASEFILE_BILLARRANGEMENT_EXPENSE_MAXIMUMEXPENSECHARGES_
  _CASEFILE_BILLARRANGEMENT_EXPENSE_ESTIMATEXPENSEECHARGES_

  _CASEFILE_BILLARRANGEMENT_RETAINER_HOLDTHRESHOLD_
  _CASEFILE_BILLARRANGEMENT_RETAINER_TARGET_
  _CASEFILE_BILLARRANGEMENT_RETAINER_MINIMUM_

- Billing Display. New Electronic Format tokens: Tymetrix

  CounselLink
  CounselLinkAlt
  Ledes98B
  Ledes98BNoTax
  _CASEFILE_EF_CLIENTMATTERNUMBER_
  _CASEFILE_EF_CLIENTIDOVERRIDE_
  _CASEFILE_EF_INVOICEDESCRIPTION_

  Ledes98BI
  Ledes98BISplitTaxes
  _CASEFILE_EF_CLIENTMATTERNUMBER_
  _CASEFILE_EF_CLIENTIDOVERRIDE_
  _CASEFILE_EF_CLIENTTAXID_
  _CASEFILE_EF_INVOICEDESCRIPTION_
  _CASEFILE_EF_PONUMBER_

  Ledes2000
  Ledes2000ICBC
  _CASEFILE_EF_MATTERFINALBILL_
  _CASEFILE_EF_CLIENTMATTERNUMBER_
  _CASEFILE_EF_CLIENTIDOVERRIDE_
  _CASEFILE_EF_CLIENTTAXID_
  _CASEFILE_EF_MATTERBILLINGTYPE_
  _CASEFILE_EF_MATTERWORKDESCRIPTION_
  _CASEFILE_EF_INVOICEDESCRIPTION_
  _CASEFILE_EF_CLIENTCONTACTID_
  _CASEFILE_EF_CLIENTCONTACTNAMEFIRST_
  _CASEFILE_EF_CLIENTCONTACTNAMELAST_

```
                            _CASEFILE_EF_CLIENTCONTACTEMAIL_
                            _CASEFILE_EF_CLIENTCONTACTPHONE_

        Ledes2Dot0
                            _CASEFILE_EF_MATTERFINALBILL_
                            _CASEFILE_EF_CLIENTMATTERNUMBER_
                            _CASEFILE_EF_CLIENTIDOVERRIDE_
                            _CASEFILE_EF_CLIENTTAXID_
                            _CASEFILE_EF_MATTERBILLINGTYPE_
                            _CASEFILE_EF_CLIENTTAXJURISDICTION_
                            _CASEFILE_EF_MATTERWORKDESCRIPTION_
                            _CASEFILE_EF_INVOICEDESCRIPTION_
                            _CASEFILE_EF_CLIENTCONTACTID_
                            _CASEFILE_EF_CLIENTCONTACTNAMEFIRST_
                            _CASEFILE_EF_CLIENTCONTACTNAMELAST_
                            _CASEFILE_EF_CLIENTCONTACTEMAIL_
                            _CASEFILE_EF_CLIENTCONTACTPHONE_
                            _CASEFILE_EF_FIRMCONTACTID_
                            _CASEFILE_EF_FIRMCONTACTNAMEFIRST_
                            _CASEFILE_EF_FIRMCONTACTNAMELAST_
                            _CASEFILE_EF_FIRMCONTACTNAMEEMAIL_
                            _CASEFILE_EF_FIRMCONTACTNAMEPHONE_
                            _CASEFILE_EF_FIRMCONTACTNAMEFAX_

        OpenInvoice
                            _CASEFILE_EF_CUSTOMERNAME_
                            _CASEFILE_EF_CUSTOMERCODE_
                            _CASEFILE_EF_PRODUCTCODE_
                            _CASEFILE_EF_INVOICEDESCRIPTION_
                            _CASEFILE_EF_CONTRACTNUMBER_
                            _CASEFILE_EF_PONUMBER_
                            _CASEFILE_EF_WONUMBER_
                            _CASEFILE_EF_AFENUMBER_
                            _CASEFILE_EF_REQUISITIONER_
                            _CASEFILE_EF_OICOSTCENTEROILOCATION_

        CMPA
                            _CASEFILE_EF_CMPAFILENUMBER_
                            _CASEFILE_EF_PHYSICIANADVISOR_
                            _CASEFILE_EF_PROVINCEOFOCCURANCE_
                            _CASEFILE_EF_DOCTORNAME_
                            _CASEFILE_EF_PATIENTNAME_
                            _CASEFILE_EF_PONUMBER_
                            _CASEFILE_EF_CASENUMBER_
                            _CASEFILE_EF_TAXCODEFEDERAL_
                            _CASEFILE_EF_TAXCODEPROVINCIAL_
                            _CASEFILE_EF_GENERALCOUNSEL_
                            _CASEFILE_EF_LEADCOUNSEL_
```

Fixed:
- Payable View. Taxes could show up in both file and firm payment breakdown; now just firm

Release 1.7.87 (9296) – Apr 28, 2022
Enhancement/Change:

- Ledes98B/BI. Added normalization of non-ascii characters.

Fixed:

- Soluno Remote. Null pointer in diagnostic logic resolved
- Time Edit. For non-administrators in some scenarios not all lawyers were available.

Release 1.7.86 (9292) – Apr 28, 2022
Enhancement/Change:
- Templates. Expressions can now use ConvertDevlos.IsZero function
- NetDocuments. More support for Canadian private storage
- Productivity Report. New tokens for responsible lawyer in the footer
- Partner. Added BitLink as an integration partner for development
- Email Configuration. Google and MS branding applied, Roboto font added to servers
- Soluno Remote. More logging for LoadPlugin
- Soluno Remote. More keywords supported
- Security. DLLs now code signed
- Billing Layouts: tokens: _CASEFILE_PREVIOUSTOTALBILLEDFEES_, _CASEFILE_PREVIOUSTOTALBILLEDEXPENSES_, _CASEFILE_PREVIOUSTOTALBILLED_, _CASEFILE_PREVIOUSTOTALTAXBILLED_, _CASEFILE_PREVIOUSTOTALTAX_, _CASEFILE_PREVIOUSTOTALFEDERALTAX_, _TOTALSAMOUNT_TAXESTOTAL_, _TOTALSAMOUNT_TAXESSTATEFEES_, _TOTALSAMOUNT_TAXESFEDERALFEES_, _TOTALSAMOUNT_TAXESSTATEEXPENSES_, _TOTALSAMOUNT_TAXESFEDERALEXPENSES_

Fixed:
- General. Zip files not automatically "popping up"

Release 1.7.85 (9265) – Apr 20, 2022
Enhancement/Change:
- Soluno Remote. Extra logging for condition where OS won't load a plug-in
- Privacy Policy now available via the status bar.
- Status Bar color updated to show server, version, copyright, and policy link

Release 1.7.84 (9258) – Apr 15, 2022
Enhancement/Change:
- Email. Now supporting direct Office 365 and Google Gmail via API; vs generic SMTP
- Email. Office 365 support to send email to draft folder vs sending to end recipient.
- Email Queue. Communications for contact not updated until email released; was when created.
- Approve/Release Invoice. Rework of screens
- Invoices. Summarized expenses will maintain rate IF all entries being summarized are the same.
- Invoice PDF. If only fee description on, using alternative amount and fee footer used->totals not shown any longer; assumed to be shown in the reworked footer section if needed.
- Soluno Remote. More internal logging
- Soluno Remote. A few more fields supported for export
- Soluno Remote. Optimized download of static lists
- Security/Browser. Another security tag added to responses
- Other internal changes to make things run better.
- GL Budget. Accounts are now sorted
- EFT file. Support for settlement date.

Fixed:
- Held Emails. Spelling correcting: Inoice to Invoice
- French Invoices. Were not automatically "popping up"
- Expressions. Better handling of non-English language formats
- Soluno Remote. Database mode may get duplicate on casefiles

Release 1.7.82 (9149) – Mar 21, 2022

Enhancement/Change:

- Soluno Remote. Static information now available to integration plugins
- Soluno Remote. Carpe Diem plugin available
- Email Queue. New layout with filter support
- Email Queue. User and email type columns added
- API / Time. Rate of -1 will trigger automatic rate and extended amount to be calculated
- Cost Center/Category. Fields expanded to 1000 characters (30 on screen)
- GL Opening Balance. Added import/export functionality
- Dashboard/File/Validate. Resets search caches to ensure balances fully recalculated
- Receivable View: Added "show credit only details"
- Payment View: Added Credit lawyer and show credit only detail fields
- Payment View. New token to show the invoice date
- Adjustment View: Added Credit lawyer and show credit only detail fields
- Productivity View: Added Credit lawyer
- Productivity View: Added the ability to show the files Area of Law.
- Productivity View: Added additional lawyer tokens (title, employee number, etc.)
- Productivity View: Lawyer's title added to default templates
- Time View: New summaries for "Fee Earner by Task" for firm with all lawyers shown
- Time View: New summaries for "Fee Earner by Task" for each lawyer broken out
- Review/Release invoices. New layout with filter support
- Billing Display. Ability to hide trust details in PDF but still include for accounting
- Billing Display. Ability to only show default/main trust account details in trust summary

Fixed:

- Gravity Legal. New Package to handle payments being dropped
- Banking EFT. Additional tokens and bug fixes to support more banks
- Contact Manager. Handle missing addresses
- Bank Rec. receipts/deposits may lose cleared/outstanding status when filters applied
- File Manager. Trap for phantom CC clients; they now get removed.
- Invoice/PDF creation. Invalid contact ID could cause crash

Release 1.7.81 (9087) – Mar 2, 2022
Enhancement/Change:
- Email Queue. Performance and memory improvements

Release 1.7.80 (9080) – Mar 1, 2022
Enhancement/Change:
- Dashboards. Ability to reorder more columns
- Ledes 2000/2.0. Ability to customize output per tax group
- Referral Source. Support mixed case and longer than 40 characters
- Security/Check Request. Permission to print changed from view access to create request
- Server. Faster reclaiming of memory for organizations/users not active
- Billing PDF. Fee/Expense adjustments without description will be hidden if amounts hidden
- Packages

Fixed:
- Settlement Statement. Balance Due token was double counting discounts
- Other internal issues not commonly found

Release 1.7.79 (9054) – Feb 21, 2022
Enhancement/Change:
- Ledes 98B – no taxes. Some processors generate tax and don't require the tax lines output.
- Ledes 2.0 – support for multiple vendors with different tax handling requirements.
- New File. System default rate group will be used if one not set with contact

Fixed:
- Ledes 2000/2.0. Ampersand in firm name will now be converted to &

Release 1.7.78 (9047) – Feb 17, 2022
Enhancement/Change:
- Billing Display. New Token: _TOTALSAMOUNT_RETAINERBALANCE_; operating retainer balance
- Dashboard/Heatmap: new "play" button to drive when heatmap updated
- Ledes 2000/2.0: internal settings to allow for some customization of output
- User Preference/Money In: Control whether invoice popup automatically shows after client

Fixed:
- Cross Reference Field not always showing.
- Hiding deleted accounts from file dashboard
- Incorrect font might be used for invoices
- Changing book potential access error

Release 1.7.77 (9036) – Feb 14, 2022
Enhancement/Change:
- Heat Map. File description added to daily time grid
- Ledes. BREAKING CHANGE. We now use the file alternate contact if specified when no file splits
- Billing Displays. BREAKING CHANGE. If text before entries used, then we now remove the 2-line spacer. Firms that really want that spacer will need to add a couple of <br/> to the text section.
- Billing Display. If a section title is exactly &xFEFF; then that line (spacer at that point) is removed
- Files. System setting. Elevate the cross reference field so that it appears at the top -not "other"
- Reports. Master layouts/definitions are now cached in memory for slight performance boost.

Fixed:
- Internal. Support user not fully added to data set.
- Static Lists. Drag n drop feature did not always work
- Change Book. Added a slight delay to allow async processes to complete (attempt #1)
- Logon. If last page is no longer available to the user it will now just take to landing page
- Preferences. Erroneous error message when saving preferences

Release 1.7.76 (9019) – Feb 11, 2022
Fixed:
- Internal regression issues introduced with 1.7.75

Release 1.7.75 (9015) – Feb 10, 2022
Enhancement/Change:
- File/Contact notes UI improvements.
- Templates. New "Header Section" tag: <PAGEBREAK/>. If detected, the body will start on pg 2.
- Templates. Expressions. Can now use C# snippets to return strings to be displayed.
- Soluno Remote. Static data will now be stored in the database (if db mode enabled)
- Soluno Remote/System Auding. Added support for casefile activity status and area of law
- SECURITY/Time. Improvements to permission logic when granted indirectly by invoicing rights

Fixed:
- Ledes 2000. Contact using alternate billing address could cause exception
- Banking Entry Drilldown. If user had no access denied they now get message; was empty screen
- User Screen. Minor UI improvements
- Book Changing. Better flow to ensure flushing of last screen and found a few variables not reset

Release 1.7.74 (9001) – Feb 6, 2022
Enhancement/Change:
- Conversions. Now handle French characters
- Time Overview. Maintenance thread now attempts balance update at night
- Dashboard/File. Deleted accounts with zero balance no longer shown
- SECURITY/Dashboards. New options to hide unwanted dashboards and/or limit time to "own"
- SECURITY/Time. Ability to make manage time entries if user had Request and/or Release invoice rights to the file.

Fixed:
- Receipts with blended payments, reginal taxes, and after adjustment may not calculate correctly

<u>Release 1.7.72 (8985) – Feb 1, 2022</u>
Enhancement/Change:
- Casefile popup. Added validate button.

Fixed:
- Casefile Balances. Another tweak.
- Casefile Balances. Trust may not be shown after validate.

Release 1.7.71 (8982) – Jan 31, 2022
Enhancement/Change:
- Static Lists. Grids can now be filtered
- Installer. Default on-prem install will now use queues by default
- Casefile Manager/Info. Balances. If banking security applied payments and Balance not shown
- Ledger Views. Additional working lawyer and filter optimizations applied.

Fixed:
- Casefile Manager. Issue duplicating matter numbers.

Release 1.7.70 (8974) – Jan 29, 2022
Enhancement/Change:
- User Setting. Ability to hide users/lawyers in help list; security sub-tab
- User Screen. Ability to filter rows based upon column filters searches
- Expense grids. Added ability to view tax group affiliated with file
- New File. System setting to force today's date for Open File date; field hidden from user
- New File. System setting to force case file number to "next"; field hidden from user
- File Manager. Validate button added to allow for a single file recalculation
- Various third-party packages updated

Fixed:
- Casefile Balances. We think we finally found the elusive issue.

Release 1.7.69 (8960) – Jan 25, 2022
Enhancement/Change:
- Server Setting. PreLoadUserInformation can now work with any Soluno process
- New Casefile. An acknowledgment dialog is shown if the user changes the file number offered

Fixed:
- Security. Password override phrases may not work
- File Manager. A deleted user could prevent a file from being shown

Release 1.7.68 (8948) – Jan 24, 2022
Enhancement/Change:
- Rest API. Contacts and files can now be retrieved as file stream; param: asfile=true.
- Soluno Remote. Support for use of database to store contacts and casefiles; default encrypted
- Soluno Remote. Uses asfile=true to improve performance and efficiently handle larger firms
- NetDocuments. Ability to do clean install or continue from last spot
- NetDocuments. New option to synchronize practice areas using codes or full description
- Server Setting. PreLoadUserInformation. For on-premise firms with server performing maintenance, front end work, and back end services.

Fixed:
- Casefile balances. Attempt to stop duplicate records from being processed
- Banking security. Could get reset when saving main security settings

Release 1.7.67 (8930) – Jan 16, 2022
Enhancement/Change:
- Security. Ability to export/import settings (excluding bank). Will auto-create groups on import
- Billing Templates. _FIRMID1_ and _FIRMID2_ tokens added; firm ID settings output
- Static Lists. "Export" label changed to "Excel"
- Static Lists. Ability to export/import many of the static lists
- On-Premise Severs. Ability to configure password length and complexity.
- 1099 Forms. 2021 layout for NEC now supported

Fixed:
- HST. Deleting a check with an ITC from finalized period could cause GL discrepancy
- File Manager. Switching electronic billing formats may not immediately update labels
- Tasks. Stage now defaulted so that it doesn't show as required field
- Messages. Large messages should be scrollable; buttons always shown.

Release 1.7.66 (8894) – Jan 6, 2022
Enhancement/Change:
- Security. Common passwords now restricted (list minimal at the moment)
- Security. Disabling a user's "Remember Me" will now invalidate active tokens
- Branding. New logo and font used for "Soluno"
- Copyright. Year updated to 2022
- Billing Display. HTML entry text boxes will now normalize entered text
- Billing Display. Basic checks to ensure valid html added/shown on screen
- GL Budget. Ability to show/hide account description

Fixed:
- CMPA. Tweaks to output logic
- NetDocs. Added additional recovery code if ND token becomes invalid during initial sync.

Release 1.7.65 (8877) – Dec 29
Enhancement/Change:
- Billing Display: if no columns selected and a total section override->don't show orphaned totals
- Billing Display: Description billing with hours column shown now only shows hours in total section.
- Electronic Billing. CMPA (Canada) format now supported

Fixed:
- New File. Creating contact from within New File would not populate new file number

Release 1.7.64 (8863) – Dec 15
Enhancement/Change:
- Internal enhancements to make the program run smoother
- Third-party packages.

Fixed:
- Configuration Screen. Make the display name field consistent with rest of program
- Contact View. Deleted tags were still active for up to 24hrs.

Release 1.7.63 (8853) – Dec 13
Enhancement/Change:
- Deposit Slip. New logic to default the date on the screen
- GL Budget. UI ready. You can start entering budget but not yet view on reports
- Internal optimizations to improve performance
- Statements (PastDue/Reminder). Order by invoice now supported.
- Casefile/Contact managers. Use Shift + "Click Play" will reset corresponding internal cache.

Fixed:
- Excel. Custom date format issue
- New Casefile. The wrong next file could be shown under some scenarios
- Invoice Deletion. If adjustment it could fail.
- TBAL. Placeholder title fixed
- EOY. Automatic general journal entry may not be generated correctly

Release 1.7.61/2 (8822) – Nov 25
Enhancement/Change:
- Ledes2000/ICBC. Format now supported
- Internal optimizations to improve performance

Fixed:
- Invoice Summary. Discounts set to "not break out" not honored

Release 1.7.60 (8811) – Nov 20
Enhancement/Change:
- Credit Card. Paid invoices no longer removed from processor's portal
- Internal optimizations to improve performance
- Package Updates

Fixed:
- LawPay. Initialization process may not complete properly
- Invoice List. Non-administrators may not see all invoices they have access to

Release 1.7.60 (8811) – Nov 20
Enhancement/Change:
- Credit Card. Paid invoices no longer removed from processor's portal
- Internal optimizations to improve performance
- Package Updates

Fixed:
- LawPay. Initialization process may not complete properly
- Invoice List. Non-administrators may not see all invoices they have access to

Release 1.7.59 (8797) – Nov 17
Enhancement/Change:
- Billing. Ability to specify a case file group during request an invoice
- Internal optimizations to load some reports quicker, especially receivables with end date

Fixed:
- Billing display. Increased expense title fields
- Batch Check Printing / Trust. Balance check may be displayed incorrectly

Release 1.7.58 (8787) – Nov 16
Enhancement/Change:
- Billing. Ability to specify a case file group during request an invoice
- Billing. New token: _FIRMBUSNUMBER_ for readability you can also use _FIRMTAXNUMBER_

Fixed:
- Batch Trust Release. Releasing multiple checks for 1 casefile+contact could result in overdraft
- Time Heatmap. Handle of office email error where required field ".from" missing

Release 1.7.57 (8779) – Nov 8
Enhancement/Change:
- User Grid. Now shows 2FA status of users and ability to export to csv
- A number of under the cover optimization to try to get more performance out of the system
- Billing Display. Title fields expanded from 100 to > 2000 characters
- Billing. _CASEFILE_TOTALTAX_, _CASEFILE_TOTALFEDERALTAX, _CASEFILE_TOTALSTATETAX

Fixed:
- Time View. Daily Summaries could crash if period too large; now restricted to 400 days.

Release 1.7.56 (8770) – Nov 4
Enhancement/Change:
- Conflict Search. Added Fee Earner to time entries presented
- A number of under the cover optimization to try to get more performance out of the system
- A number of under the cover diagnostic settings added to try to resolve some mysterious issues

Fixed:
- Receivables View. Billed Summary total cost token wasn't calculating correctly
- Case file information popup. Responsible lawyer showed for assigned lawyer

Release 1.7.55 (8744) – Oct 27
Enhancement/Change:
- Invoicing/Activity Code. Summarize setting now has option to include hard costs.
- Vendor Cash Flow. Filter by file added

Fixed:
- Invoicing. "Fee Description Only" entry would not show if no other fees shown

Release 1.7.54 (8737) – Oct 24
Enhancement/Change:
- Expense View. Ability to filter by activity code added
- Expense View. Tokens for Last TAF and Last Levy added indicate Soft Cost only feature.
- Money IN/Security. Create permission now allows for printing of receipts
- Payables. Logic to calculate due and reminder dates updated
- Invoice. Adding/Editing charges from approval screen no longer tells you it is on an invoice

Fixed:
- Under the hood tweaks for integrations
- Under the hood tweaks for better data conversions
- Users with very limited rights could cause crash retrieving contacts or casefiles
- Invoices/AP. Payables with multiple references to the same file would print attachments multiple times.
- Invoice Release. Sorting by file description
- Invoice Approval Select charges. Grid state now saved
- GST/HST View. Deleting an AR adjustment from a previous period would not update correctly.
- Bank Rec. Deactivating Receipts Vs Deposit screen didn't work
- Bank Rec. Previous entries screen. Trash can may not work.
- Bank Rec. Old deposit slips could show up in some situations.

Release 1.7.53 (8711) – Oct 14
Enhancement/Change:
- Contact View. New tokens for main address individual fields (Excel friendly)
- Activity Codes. Summarize setting title changed to indicate Soft Cost only feature.
- Third party packages

Fixed:
- GL Opening Balances with PST issue
- Trust Safety. Crash (regression)

Release 1.7.52 (8700) – Oct 12
Enhancement/Change:
- Billing Display. Column titles increased from 100 to 1000 characters to allow for html
- Statements. Additional tokens for footer
- Other internal changes to enhance performance for firms with huge number of casefiles

Fixed:
- Operating Retainers. Authorization override issue
- Entry Import. Error if activity code provided, but no explanation
- Review/Release Invoices. Checkmarks not resetting correctly

Release 1.7.51 (8677) – Oct 1
Enhancement/Change:
- General Journal: Ability to drag-n-drop row entries
- Nacha/EFT: Ability to specify filename template

Fixed:
- Security/Invites. Resending an invite could cause crash
- Network caching. Additional headings returned so that caching servers don't cache critical data.
- A few behind the scenes bug squashes

Release 1.7.50 (8666) – Sep 24
Enhancement/Change:
- EFT File Creation. New feature (beta)
- Packages.

Release 1.7.49 (8659) – Sep 21
Enhancement/Change:
- Education Accounts. Support user now enabled.
- Ledger View. Ability to get wip with billing status as of end date (current) or today
- Payables. New payables can now be entered that total zero
- Internal changes to make the program run smoother

Fixed:
- Invoices. Discounts + Ledes + modifying expenses could cause crash
- Outlook. Soluno contacts were not being sent to Outlook
- Ledes98BI. Discounts were being ignored in output
- Contact Cover. Disabling the invoice section didn't remove the words "Invoice:"
- French. Transfers didn't use the French language equivalent for description
- French. Some trust verbiage wasn't converted from English
- Settlement Statements. Contact tokens in text fields could cause crash
- Transfers. Rare condition that could prevent deletion of a transfer.

Release 1.7.48 (8627) – Sep 1
Enhancement/Change:
- Contacts. You can now add banking information to a vendor
- Contact View. New template shipped showing vendor banking information
- Contact View. New token to show electronic billing format
- Packages.

Fixed:
- Casefiles. Default Task ID now showing BW
- NFLD Transaction Levy. Various issues
- Data Entry. Payee name could get removed after entering a file number
- Invoice. Discounts could cause crash with some templates
- Invoice. Switching invoice numbering methods may not reset correctly
- Clio. Recover from the rare scenario where a soluno contact doesn't have an address

Release 1.7.47 (8607) – Aug 25

Enhancement/Change:
- Invoice Fee Summary. Ability to add extra lawyer data
- Invoice. New tokens for first charge date
- Packages.

Release 1.7.46 (8599) – Aug 24
Enhancement/Change:
- Settlement Statement. You can now request a statement by client with file data merged.
- Contact View. Roles token now shows the additional users with their roles
- Packages.

Fixed:
- Casefiles. Default Task ID processing
- Gravity Legal. SDK update to support echoing our internal identifiers.
- Licensing. Rare condition leading to deleted user showing as logging in.

Release 1.7.45 (8587) – Aug 16
Enhancement/Change:
- NEW Ledger view. Supports simple interest on charges (hard, soft, and fees). Unbilled expenses template shipped.
- BREAKING CHANGE. Document Lite. Only supporting for current customers.
- Document Lite. Uploads limited to 20Meg per file.
- BREAKING CHANGE. Checks no longer print numbers for zero amount checks; left blank for hand fill at a latter time.
- Open Invoice. Added support for outputting header lines. Some new tokens
- User/Lawyer Phone numbers. Now saves whatever is typed (was digits). SMS converts letters to numbers as per keypad. Phone numbers displayed on invoice (via tokens) now supported.
- Third-party packages updates.

Fixed:
- Bank Rec. Bank Feeds. Check to new entries didn't populate Paid To field
- Entry Import. More Unicode characters trapped
- Contact. Main email now tagged as home/work per individual/company setting; was work only.
- Gravity Legal. Updated SDK to support back end changes for payments.

Release 1.7.44 (8565) – Jul 29
Enhancement/Change:
- NFLD Transaction Levy. Now supported.

Fixed:
- PDF Viewing. Added support for dashboard printings
- Gravity Legal. URL Link creation issue
- MICR. Batch printing could lead to leading zeros added to account
- Invoicing. Currency symbol not shown if not explicitly configured in settings

Release 1.7.43 (8558) – Jul 22
Enhancement/Change:
- Soluno Remote. Number of enhancements for CopiTrak, System Auditing, and PaperCut.
- Ledes 98B/Tymetrix. Ability to set tax description text via custom setting
- Ledes 98B. Default tax description text changed from "Tax on.." to "VAT on…"
- PDF User Preference. Ability to show PDFs in new tab vs always download (default)
- Invoicing. Ability to set left and right page margins (PREVIEW)
- Invoicing. 33 new lawyer tokens; 11 each for responsible, assigned, and lead:
    1. "_CASEFILE_RESPLAWYERDEPARTMENT_"
    2. "_CASEFILE_RESPLAWYERJOBTITLE_"
    3. "_CASEFILE_RESPLAWYEREMPLOYEENUMBER_"
    4. "_CASEFILE_RESPLAWYERTAXNUMBERFEDERAL_"
    5. "_CASEFILE_RESPLAWYERTAXNUMBERSTATE_"
    6. "_CASEFILE_RESPLAWYERLAWSOCIETYNUMBER_"
    7. "_CASEFILE_RESPLAWYERLEGALAIDNUMBER_"
    8. "_CASEFILE_RESPLAWYERATTORNEYGENERALNUMBER_"
    9. "_CASEFILE_RESPLAWYERICBCNUMBER_"
    10. "_CASEFILE_RESPLAWYERMEMBERSHIPNUMBER_"
    11. "_CASEFILE_RESPLAWYERLEDESID_"
    12. "_CASEFILE_ASSIGNEDLAWYERDEPARTMENT_"
    13. "_CASEFILE_ASSIGNEDLAWYERJOBTITLE_"
    14. "_CASEFILE_ASSIGNEDLAWYEREMPLOYEENUMBER_"
    15. "_CASEFILE_ASSIGNEDLAWYERTAXNUMBERFEDERAL_"
    16. "_CASEFILE_ASSIGNEDLAWYERTAXNUMBERSTATE_"
    17. "_CASEFILE_ASSIGNEDLAWYERLAWSOCIETYNUMBER_"
    18. "_CASEFILE_ASSIGNEDLAWYERLEGALAIDNUMBER_"
    19. "_CASEFILE_ASSIGNEDLAWYERATTORNEYGENERALNUMBER_"
    20. "_CASEFILE_ASSIGNEDLAWYERICBCNUMBER_"
    21. "_CASEFILE_ASSIGNEDLAWYERMEMBERSHIPNUMBER_"
    22. "_CASEFILE_ASSIGNEDLAWYERLEDESID_"
    23. "_CASEFILE_LEADLAWYERDEPARTMENT_"
    24. "_CASEFILE_LEADLAWYERJOBTITLE_"
    25. "_CASEFILE_LEADLAWYEREMPLOYEENUMBER_"
    26. "_CASEFILE_LEADLAWYERTAXNUMBERFEDERAL_"
    27. "_CASEFILE_LEADLAWYERTAXNUMBERSTATE_"
    28. "_CASEFILE_LEADLAWYERLAWSOCIETYNUMBER_"
    29. "_CASEFILE_LEADLAWYERLEGALAIDNUMBER_"
    30. "_CASEFILE_LEADLAWYERATTORNEYGENERALNUMBER_"
    31. "_CASEFILE_LEADLAWYERICBCNUMBER_"
    32. "_CASEFILE_LEADLAWYERMEMBERSHIPNUMBER_"
    33. "_CASEFILE_LEADLAWYERLEDESID_"

Fixed:
- Invoicing. Custom currency system not being honored
- Ledes 2.0. Invoice with expenses that total to zero can cause division by zero

Release 1.7.42 (8548) – Jul 19
Enhancement/Change:
- General. Updated emails to use @soluno.legal (was @devlossoftware.com) in program
- Tymetrix/Ledes98B. Canada. Ability to specify tax activity code
- Statements. Email address used now honors the "Display As" setting in the contact
- Servers. Clio and Credit Card threads now default to disabled (only affects on-premise firms)

Fixed:
- Invoice Search. Better handling on invoices where associated contact not in search table.
- Security. iFrame security policy header modified to be more effective
- Clio. Patching custom fields may fail if "empty" custom field exists with record

Release 1.7.41 (8535) – Jul 15

Enhancement/Change:

- PDF Generation. Switch to the new 64bit version of the package
- Clio. Added logging report (sent to support@soluno.legal) to help with synchronization issues
- Servers. Clio and Credit Card activities can now run in their own process.
- Packages

Fixed:

- Clio. Added pre-test to ensure valid access token
- Security. iFrame security policy header modified to be more effective

Release 1.7.40 (8523) – Jul 14

Enhancement/Change:

- Soluno Remote: PaperCut/SystemAuditing/CopiTrak. Support for Mapped codes and file status
- Clio. Contact report. New token to show clio id for contacts and files

Fixed:

- Ledes 2000 / 2.0. special xml characters may not get translated correctly
- Invoicing. Billing address token may throw exception
- Data Entry. Incorrect contact information may be shown in rare situations
- Invoicing. Date format override not being honored (regression from adding French support)
- Data Import. Import file with UTF-8/16 BOM record included.
- Miscellaneous fixes for data conversions
- Invoicing. Rounding error on some automatic adjustments done during request invoice.
- Contact Manager / New Group Contact. Prevent adding "themselves" as a member to prevent loops.

Release 1.7.39 (8507) – Jun 29

Enhancement/Change:

- Invoicing. New tokens: _CASEFILE_ASSIGNEDLAWYER_ _CASEFILE_ASSIGNEDLAWYERFULL_ _CASEFILE_ASSIGNEDLAWYEREMAIL_ _CASEFILE_ASSIGNEDLAWYERPHONE_ _CASEFILE_LEADLAWYER_ _CASEFILE_LEADLAWYERFULL_ _CASEFILE_LEADLAWYEREMAIL_ _CASEFILE_LEADLAWYERPHONE_
- Conflict Checking. By design not all files shown for contact. Added ellipsis(…) to end of list to indicate.
- Clio. Additional addresses now treated as billing address (was "other")

Fixed:

- Ledes98BI. Possible exception depending on contact addresses
- Check Printing. If batch printing and "next" check didn't have memo, it could use previous
- Bank Rec. If checks not printed (reference not assigned yet), bank rec could hang

Release 1.7.38 (8494) – Jun 28
Enhancement/Change:
- Invoicing. Two new tokens: _CASEFILE_RESPLAWYEREMAIL_ and _CASEFILE_RESPLAWYEREPHONE_

Fixed:
- Entry Import. Handle em-dash and en-dash characters (convert to hyphen)
- Invoicing. Summarized expenses + taxes + ledes billing could lead to tax mix-calculation on PDF
- Conflict Search. Using ~ (word join) after punctuation caused punctuation to be dropped.

Release 1.7.37 (8487) – Jun 22
Enhancement/Change:
- Invoicing. Billing address token: supports 2 column mode.
- Invoicing. Billing address token: supports including main name
- Invoicing. Billing address token: now sorts names
- Invoicing. Fee/Expense sections: now supports inserting description only entry
- Invoicing. Fee/Expense sections: now supports adding section footer.
- Invoicing. Fee/Expense sections: if ALL titles are set to ﻿ then the title line is removed.
- Invoicing. Fee/Task summaries: Can now show totals
- Invoicing. New token: _TOTALS_NEWCHARGESTAX_ - shows the current charges + taxes
- Invoicing. New option to show new charges + tax sub total in totals section
- Invoicing. New rule: if fee summary shows totals, no amount column, alternate format, no splits, and discounts are shown in the fee summary => amount total hidden in fee section
- Invoicing. New rule: If no hours column and fee summary shows totals => hide hours total in fee section
- Invoicing. Tax Exempt section title can now be set from within tax group (where section enabled)
- Time/Expense import. Better support for extended ansi characters (French, etc)

Fixed:
- Gravity Payment. Invalid token test
- Clio. Better handling of active timers
- Clio. Better handling of time entries where total isn't provided
- Enabling 2FA authentication application at time of logon

Release 1.7.36 (8466) – Jun 16
Enhancement/Change:
- Clio Integration. Number of UX and internal performance issues.
- Time/Expense Sheets. Added entry count to grid footer
- Invoicing. Select Charges. Added rate column to fee grid
- PaperCut/Soluno Remote. Added new fields for processing
- Package Updates.

Fixed:
- Adjust Invoice. Adjusting fees up from zero could cause error
- Ledes98. Regression. Invoice description didn't output correct field
- Invoicing. Token: _CLIENT_EXTRABILLINGADDRESSES_ improved formatting

Release 1.7.35 (8449) – Jun 11
Enhancement/Change:
- Invoicing. Fee and task summaries titles can now be configured
- Invoicing. Fee and task summaries discounts can now be included/excluded
- Invoicing. Fee summary. Ability to show individual lawyer rates or blended (current)
- Soluno Remote. Inactive status on files now handled
- Package Updates.

Fixed:
- Ledes 98BI. Tax text processing issue.
- Invoicing. _CLIENT_EXTRABILLINGADDRESSES_ token only processes one extra billing address

Release 1.7.34 (8439) – Jun 8
Enhancement/Change:
- Clio. Synchronization of task codes and activity codes improvements
- Invoicing. New token to allow for all billing addresses to be output
- Contact/Casefile help lists. Now honor Is Company/Individual flag
- Package Updates.

Fixed:
- Gravity Legal and Clio configuration screens affected by internal work
- Ledes. Drafts run "As final" timing issues could cause issues
- Ledes 2000/2.0. Special characters in name field not remapped
- Ledes 98BI. Regression issue from adding split billing support
- Time/Expense import. EOF character caused blank entries.
- Various data import issues.

Release 1.7.33 (8424) – Jun 4
Enhancement/Change:
- Ledes 98B/BI. Support for split contact custom data.
- File Manager. Billing contact phone and email now shown
- Invoicing. Canada. French invoices/statements can now be generated (preview)
- Invoicing. Approve/Release grids can now display department
- Performance. Various internal enhancements to improve logons and various screens
- Internal changes to support better logging in various areas
- Time/Expense Import. Support for fixed length input files
- Chat. Disabled for academic accounts
- Bank Release / Batch Print. Warning added if "never print" is selected
- Package Updates.

Fixed:
- Blended Payments could cause error when outstanding fee is zero
- Admin/Activity Codes. New summarize options not selectable
- Heatmap. Printing alternate month didn't format correctly

Release 1.7.32 (8391) – May 30
Enhancement/Change:
- Time View. Performance enhancements
- Security. Added security to help prevent ClickJacking attacks
- Soluno Remote. Added ability to support 2 levels of output parsers

Release 1.7.31 (8384) – May 26
Enhancement/Change:
- Ledes 98B/BI. Support to use a user's Ledes number if present vs initials
- Ledes98BI. Ability to override tax code via database setting (requires support assistance).
- Casefile/Contact lookup. Optimized handling of closed vs active files.
- Contact/Ledger/Receivable/Payment/Adjustment views. Ability to filter by department
- Invoicing. Ability to perform mass billing by department.
- Partner Dashboard. Non-timekeepers with only adjustment entries are no longer shown.
- Package Updates.

Fixed:
- Settlement statement handles no contact cover scenario better.
- Dashboard/Time Entries. Editing a time entry from the dashboard inconsistency.

Release 1.7.30 (8369) – May 20
Enhancement/Change:
- Contact View. Ability to filter by Contact and/or Casefile tags

Fixed:
- Release/Batch Print.   Limit of 500 entries removed to accommodate check combine printing
- Security. Changing password with existence of invalid token may prevent logon
- Gravity Legal. Check to see if account initialized before using security objects
- Contact Cover. Not all tokens initialized if not showing summary section
- Clio. Contact with recently changed address record used soft-deleted prior address
- Invoicing. Split billing rounding issues with certain amount+percent combinations
- AP Reports. Extra blank lines may be inserted on allocations throwing off alignment
- AP Reports. Firm allocations showed tax handling; now shows blank
- Internal fixes for database cloning
- Billing Display. Alternate Fee arrangement not honoured if hours not shown.

Release 1.7.29 (8355) – May 17
Enhancement/Change:
- Ledes 2000/XML. User lawyer's "Other Number" for ID field if provided
- Activity Codes/Invoicing. New options to summarize by Date.
- DocStar Integration. Soluno Remote plugin available
- PaperCut Integration. Soluno Remote plugin available
- Packages

Fixed:
- Spelling mistake on security screen.
- System Auditing. Minor fixes to plugin

Release 1.7.28 (8345) – May 12
Enhancement/Change:
- Ledes 2000/XML. Non-administrators can now generate files

Fixed:
- Trust Admin Fee. GL Accounts could not be edited after they were entered
- Contact Cover. Split taxes (BC) did not show tax totals correctly

Release 1.7.27 (8337) – May 10
Enhancement/Change:
- Bill Display / Invoice Cover. New _BILLINGLAWYERTITLE_ token
- Group Contact. Will not be shown if firm requiring address information with contacts
- NetDocuments. Added support for ND no longer being case-insensitive (it appears)
- File Group. Ability to specify a department. Precursor to department invoicing/reporting
- Security. Option to force double verify when resetting/deleting on time and expense sheets
- Invoicing. Department stored with invoice for future reporting requirements
- Many internal performance optimizations. Should make searches and saving data faster.
- Approve Invoice / Preview. Cancel button renamed to Undo and added Grid mode button.
- Approve Invoice. PDF "as final" with electronic billing images will now create zip file for review
- Ledes 2000. Requires fee/expense description. If not found, "Not provided" will be supplied.
- Package Updates

Fixed:
- Client Views. Handled upgrade situation where both a file and contact were entered previously
- File/Contact Searches. Internal Error/Stack dump
- Billing Display. Alternate fee arrangement conflict when hours not shown; disabled in scenario.
- Approve Invoice. Another attempt to reset check marks after posting
- TAF (BC). Fixed display issue in Quick Entry from drill down.
- Template Import. Didn't import logos correctly
- LawPay. In some scenarios invoice image may not be uploaded to portal.
- Gravity Legal. Minor fixes

Release 1.7.26 (8301) – May 2
Enhancement/Change:
- Gravity Payment credit card processor now supported
- Bank Reconciliation. File information is shown in receipt and check grids
- Conflict Check. Contacts associated to file via billing address now surfaced.
- Security. New Client View setting to force a file/contact to be entered by users.
- Contact View. New ½ page label template shipped
- Contact View. Ability to output a file's billing address contact number
- Payment Listing. Ability to filter by credit fee earner
- Operating Out Checks. New tokens: _APMEMO_ and _MEMOAPMEMO_
- Ability to Export/Import templates
- Internal enhancements to support onboarding processes
- Package Updates

Fixed:
- Operating Out. Typing a bank account (vs selecting) would cause a reset to "Request"
- NSF Operating In. Could be posted to an incorrect GL on a cash system
- Clio. Various minor enhancements.
- Reset books. A few tables weren't reset.
- Security. Only security settings required (was all) are loaded for a request
- Searches. Optimized casefile/contact reloading from database (may be faster)
- Security. Access via Responsible fee earner list now working
- Data Templates. Special characters could cause an error

Release 1.7.25 (8244) – Apr 11
Enhancement/Change:
- Data Templates. Support for multi-line fields
- Time View. New template to show daily time listing broken out by task – excel only.
- Invoice Preview. No longer created optimistically; now waits for user request.
- Invoice Searches. When no invoice details requested, less stringent security applied.
- Contact View. New token: Is Company available.
- Package Updates

Fixed:
- Excel. Summary only exports will no longer have a main page with nothing on it.
- PDF. Very long PDFs could repeat information.
- Transfers. If batch check printing was used, check number could not be edited.

Release 1.7.24 (8208) – Mar 25
Enhancement/Change:

- Unity. Support for Unity added
- Invoice. New tokens for casefile open date
- Contact Cover. Ability to process summary tokens in text fields
- Settlement Statement. Now honors entries up to date
- Invoice Preview. Performance. Now only creates previews upon request/need.
- Package Updates

Fixed:

- Contact with address record could cause issues
- Invoice Preview. Some elements didn't render the same as PDF
- Invoice Preview. Buttons better aligned
- Invoice/Credit Card links. May show draft links in some scenarios.
- Contact Cover. Didn't use forced billing display template in determining column inclusion.
- Invoice Deletion. Could fail if attached adjustment was created/deleted at some point.
- Clio Integration. Various fixes
- Invoice Review. Checkmarks not reset after posting
- Data Entry. Optimized Trust Balance validation for casefiles.

Release 1.7.23 (8166) – Mar 15
Enhancement/Change:

- New Matter/Matter Manager. Contact billing contact now shows name address beside input
- New Matter/Matter Manager. Contact billing contact shows beside main contact
- Soluno Remote/System Audit. New Plugin for system audit; used by Lighthouse customers
- Invoice/Contact Covers. Can now be specified at the contact level
- Electronic Billing. Ledes98BI with split taxes (federal an state) format
- Package Updates

Fixed:

- Data Import. Unquoted value could cause error
- Opening Balances. Vague error if taxes not correctly recorded when entering amount
- HST Report. Rare scenario where PST only entries could show on HST report
- Settlement Statement. Didn't factor in taxes on discounts correctly
- Clio. Integration fixes

Release 1.7.22 (8140) – Mar 4
Enhancement/Change:
- Invoicing. NEW preview mode in approve invoice
- Solouno Remote. Calculates tax category for expenses if not provided in data feed.

Release 1.7.21 (8132) – Feb 25
Enhancement/Change:
- Soluno Remote. Can now be configured to work with servers with invalid certificates
- Equitrac/Worldox. Now supports fixed text fields in matter output file
- Package Updates

Fixed:
- Twilio/SMS. Bad Package update
- LawPay. Events may not be downloaded due to bad data received from LawPay
- Receivable Views. Credit Lawyer Summary didn't reflect all hours worked.

Release 1.7.19/20 (8124) – Feb 23
Enhancement/Change:
- Invoices. CC information can now show mailing,email, or both extended information
- File/Contact manager/viewers new show both company and name if both present
- Equitrac. Soluno Remote now supports Equitrac
- Worldox. Now supports Area Of Law
- Contact View. Added ability to view just "other" contacts and reworked selections
- Data Import. More date formats supported
- Packages

Fixed:
- Removed interest group from contact manager
- Provisional Adjustments with taxes may not have reversed correctly
- Provisional Adjustments using blended payment + taxes + non-zero balance on receivable report
- GST/HST report could fail with no explanation

Release 1.7.18 (8098) – Feb 8
Enhancement/Change:
- Clio Integration. Ready for beta.
- Statements. Carbon Contacts now supported.
- Productivity View. Option to categorize invoice adjustments as "Other"
- Sign-on. Last user name will now automatically be shown

Fixed:
- Conversions. Values now trimmed
- API. Many files/contacts with same time stamp didn't always update high watermark correctly.

Release 1.7.17 (8087) – Feb 3
Enhancement/Change:

- Adjustment View. Summaries now supported when running Provisional Adjustments only filter

Fixed:

- Delete adjustment could show on GST/HST and PST reports under rare conditions
- Preview GST reports could block the deletion of an invoice prior to end date of report
- Heatmap. Office emails without "From" email could hang daily view
- Settlement Statement. Custom text using signature token would cause crash
- API. Retrieving contacts/files via highwater mark with >100 entities having same modified

Release 1.7.16 (8072) – Jan 28
Enhancement/Change:

- Payment Listing. Case referral token now available for page heading
- Licensing. Shared mode now always enabled. Removed from UX.
- Licensing. Support now has ability to set licensing override for a period of time

Fixed:

- Dashboard Time Overview. Firm totals may be off by one lawyer.
- Invoice. Automatic Expense entries now will use associated tax category of activity code
- Conflict Search. Data in data template fields may be skipped in some scenarios.

Release 1.7.15 (8062) – Jan 22
Enhancement/Change:

- Invoicing. Option to ignore trust less than date now factors in "show all trust history" setting.

Fixed:

- CounselLink. Alternative format. Changed tax category for tax on fees to IF.
- Invoicing. Tax Exempt section option didn't show section totals correctly.
- New Contact. After a back-numbered file was created, white screen may have been shown.
- Worldox. Additional logging.

Release 1.7.14 (8052) – Jan 13
Enhancement/Change:
- Rates can now be exported
- Soluno Remote/iManage. Supports text fields
- Static Fields. Many expanded to 20 characters
- Electronic Billing. New alternative CounselLink format for tax support
- Packages

Fixed:
- Batch Check Printing. Possible assignment of incorrect check numbers
- New Contact. Could hang after a conversion
- Bank Rec. New Bank Errors could be marked as cleared
- Various Grids. Name field. Individuals with company would show company first
- Quick Entry / Time. Setting billable hours to 0.00 did not recalculate the amount

Release 1.7.12 (8025) – Jan 4
Enhancement/Change:
- 1099. Support for 1099-NEC (default) form and 1099-MISC form
- Conversions. Support for Practice Panther and FreshBooks
- Copyright updated from 2020 to 2021
- Packages

Fixed:
- Invalid users may cause current usage count to be incorrect
- Dashboards could not be printed (regression from chat upgrade)

Release 1.7.11 (8018) – Dec 29
Fixed:
- Licensing. Full time users were locked out if no licenses available for part-time users.
- Invoicing. Adjustments could cause math errors.
- Chat. Now hidden when footer toolbar shown – usually on phones.

Release 1.7.10 (8012) – Dec 28
Fixed:
- Receivable Views. Introducing filter

Release 1.7.9 (8010) – Dec 24
Enhancement/Change:
- Chat. New Chat Engine with ability to direct to Sales or Support
- Invoice. Canada (BC). Ability to see tax status for PST and PST + GST expenses.
- Invoice Contact Cover. Ability to show breakdown between Federal and Provincial taxes.
- Receivable View. Canada. New template showing tax breakdown between Federal/Provincial.

Fixed:
- Internal fixes from testing of 1.7.8 (never released)

Release 1.7.7/8 (7992) – Dec 18
Enhancement/Change:
- Data Conversion. In preparation of Clio integration
- Ability to White List users for licensing
- Entry Import. Added "Act Code" as a valid field name title to mean activity code
- Grids/GL Name. Optional column available on grids showing posting reference

Fixed:
- Invoice/Provisional Write Off. Previous balance didn't ignore
- PWO. Filter to exclude didn't work on all reports
- Operating Out. Prevent allocations from being errantly removed
- Data Entry. Tweaked algorithm to assign check/receipt numbers more consistently
- Invoice/Select charges. Requested checks were available for inclusion on invoice.
- Ledger Views. Process all entries if exclude non-billable work or PWO as real selected
- Contact Manager. Additional logic to prevent cyclic contact references
- Money Out. Voiding an unprinted entry would show an unhelpful message
- Heatmap. YTD numbers not correct when viewing another user's heatmap
- Contact Views. Child and Parent tokens were not showing complete information

Release 1.7.6 (7964) – Dec 3
Enhancement/Change:
- Enh. WIP AR Ledger report template now shipped.
- Enh. Deposit Slip now allows for negative deposit slips.

Release 1.7.5 (7960) – Nov 30
Enhancement/Change:
- Enh. MICR now supported for checks; requires custom layout.
- Enh. BC AR Leger report template now shipped.

Release 1.7.4 (7948) – Nov 25
Enhancement/Change:
- Enh. Statements. Ability to email.
- Statements. Heavily optimized to handle extremely large data sets.
- iManage. Plugin for Soluno Remote available
- Expense View. AP entries now show Vendor as Paid To (was blank). GL now always shows.
- Packages

Fixed:
- Expense View. Markups now show up as soft costs regardless of source journal

Release 1.7.3 (7915) – Nov 19
Enhancement/Change:
- User's who stayed logged in for extended periods could avoid logon audits.
- 2FA. Administrators can reset 2FA for users via "require password change on next log on"

Fixed:
- User's who stayed logged in for extended periods could avoid logon audits.
- Zip files could be marginally corrupted with large number of files embedded.
- Time Entry. Task code with default hours did not automatically calculate amount field.

Release 1.7.2 (7908) – Nov 18
Enhancement/Change:
- BREAKING CHANGE FOR INTEGRATIONS: one of the methods to renew access tokens is no longer supported.   Existing tokens will expire after 30 days from issue.
- Licensing/Overage. Overage usage was being tracked but not enforced. Users will not be able to access organizations that would cause overage conditions.
- Licensing. Ability to white list users (consultants) - they don't require a license to support firms
- Packages

Fixed:
- PST Remittance. British Columbia PST Commission issue
- Receivable Views. Large data sets with certain filters could take a long time.

Release 1.7.1 (7887) – Nov 13
Enhancement/Change:
- Enh. Soluno Remote available for general release.
- Enh. Soluno Remote - Worldox plug-in available
- Enh. Soluno Remote – Copitrak plug-in available
- Enh. Provisional Write Offs now supported.
- Data Entry. File Description column now available on most screens.
- Internet Explorer is no longer supported
- Checks. Extra Matter and Description tokens available.
- Lawpay/Fatt Merchant. Invoice drafts no longer show links for clients without an email address
- Time/Expense. Option to export grid information to csv
- Invoices. Changed "* = tax exempt" to "* tax-exempt"
- Casefile Groups. Made Area of Law required when using Task-Based billing
- Packages

Fixed:
- PST Remittance. PST Commission on remittance addressed
- Grids. Could show columns for features that weren't enabled in settings (rare).
- Grids. Ensure buttons/icons at end were not hidden by accident
- Reports. PDF creation could show extra page if previous page ended in a new page request
- Reports. Screen now handles same token used multiple times.
- Invoice. Select charges. User without invoice view access but has request/release access error

Release 1.6.32 (7801) – Oct 21
Enhancement/Change:

- Time/Expense import. Support multiple custom layouts per firm.
- Batch/Release Check. Can now export the contents of the grid to excel.
- Taxes. Reminder to close the period when entering a tax remittance.
- Packages

Fixed:

- New Contact. If last contact entered uses an old client number then possible to get exception retrieving next available.
- Case Files. Ensure credit percent total is always 100%
- 1099. Notes for vendor only shown when single vendor selected.
- Invoice List. A client with more than 500 outstanding invoices could be shown duplicated.

Release 1.6.31 (7759) – Oct 14
Fixed:

- Soluno Remote. Matter/client download list

Release 1.6.30 (7754) – Oct 9
Enhancement/Change:
- Enh. Ledger. Retainer Target and Retainer Minimum tokens added
- Enh. Invoice View. Credit lawyer filter added

Release 1.6.29 (7749) – Oct 8
Enhancement/Change:
- Enh. Invoices. Ability to customize column headings
- Enh. Statements. Additional alternate template shipped with no aging

Fixed:
- HST Journal. Remittances through AP now show correctly
- periods in a timekeepers name caused heatmap download to create bad filename

Release 1.6.28 (7727) – Oct 6
Enhancement/Change:
- Enh. Receivable Views. Filter by File Introducing (non-zero percentage) available.
- Enh. Check Payee. Alternate address selected: option to use the name on alternate.
- Statements. Location and Cross Reference fields now available
- Views/Templates. Layout field now wider to support longer names
- Packages

Release 1.6.27 (7716) – Oct 4
Enhancement/Change:
- Enh. Soluno Remote now in preview
- Enh. CopiTrak integration now in preview

Fixed:
- General Journal. Corrected report title
- Payment Processing. Client number not always filled in on allocation line

Release 1.6.26 (7691) – Sep 30
Enhancement/Change:
- Activity Codes. You can now specify a default tax category for expenses
- Time Zone. The firm can now set their time zone for time stamps on reports and LawPay
- Receivable Views. Alternate templates now shipped with more space for invoice numbers
- Review Billable Status. Improved loading time when lots of entries shown.
- Contact Manager. "Addition Phones" changes to "Additional Communication Methods"
- Receipts. Dollar symbol now displayed on amounts.

Fixed:
- Receipts: Spelling correction on form
- Checks. Choosing a tax status of "PST Only" still allowed an HST/GST tax to be entered.
- Operating Out / New Payable. Line entries could get dropped under certain conditions.
- Firm Country/Canada. Now uses province codes when country not filled in.
- Bank Rec. EFT deposits would lose their cleared status upon reload.
- Packages

Release 1.6.25 (7649) – Sep 24
Enhancement/Change:
- Contingency. Ability to tag via File Groups contingency cases.
- Leger Views. Ability to filter out Contingency files
- Overage. Message showing overage not shown correctly.
- 2-factor. SMS. Additional phone license added to cloud solution

Fixed:
- Credit Card. Accounts with exact same name.
- Transfers. "To" Contact field not always filled in leading to AR balance not showing
- Batch Pay Payable. If executed after voiding a check, an exception would occur
- Packages

Release 1.6.24 (7600) – Sep 21
Enhancement/Change:
- Exceptions. Better logging of system exceptions

Fixed:
- Canadian. Language fixes
- Bank Rec. Receipt vs Deposit issues

Release 1.6.22/23 (7590) – Sep 16
Enhancement/Change:
- Bank Rec. Internal logging enhanced to help diagnose client issues
- Bank Rec. Checkmarks becoming unchecked after adding new check (regression from 1.6.22)
- Licensing. Added logging for communication errors with licensing server.
- Database. Optimized for memory loading of casefiles (for firms with >20k files)
- Third Party package updates. Inc PDF engine.

Fixed:
- Ledes98BI. Calculation of taxes on zero amount fees
- Cashflow Dashboard. Minor fixes

Release 1.6.21 (7567) – Sep 10
Enhancement/Change:
- Ledger View. Memory optimization to handle larger data sets better
- Third Party package updates.

Fixed:
- Contact View. Introducing and Billing percentages may include deleted records.
- Cashflow Dashboard. Various tweaks

Release 1.6.20 (7551) – Sep 3
Enhancement/Change:
Fixed:
- Cash Flow. Validate user had to be both admin and power user; needed to be either.
- Cash Flow. Recalculation. Overnight windows to perform update extended
- Backup. Possible SQL exception handled better

Release 1.6.19 (7548) – Sep 3
Enhancement/Change:
- NEW Dashboard Cash Flow. Admins/Power Users only. Replaces Banking Dashboard. Has a many new summary numbers to help the firm manager the money.
- Dashboard Banking. Balance as of Today and All Dates now both shown (if different)
- Dashboards. All dashboards can now be downloaded to PDF.
- Dashboards. Cleaner overall look.
- Bank Reconciliation. Deposit grids now show the date of the first receipt on main line (sortable)
- Trust to Operating Transfers. System option to always create receipts for transfers.
- Clone Window. Contact View now available
- Entry Import. Now supports dollar fields that included a currency symbol
- Operating IN. Invoice Pop-up now has optional fields for billed amounts (fees, hard, soft, etc.)
- Alert Messages. Download button replaced with simple PDF icon.
- Bill Display. Two new tokens available for tax on fees and tax on expenses.

Fixed:
- Expense Markup. Some calculations led to fractions of pennies being processed incorrectly.

Release 1.6.18 (7520) – Aug 25
Enhancement/Change:
- Financials/GL. New view. Full. Shows Department, Category, and Cost Center
- Financials/GL. New view. Combined. Like Full with one column for entry amounts (CR are -ve)
- Deposit Slip. Improved loading efficiency.
- FattMerchant Integration. Now available for general audience.

Fixed:
- Bank Rec. Various Receipt/Deposit alignment issues
- LawPay. Processing Trust Funds from direct portal link.

Release 1.6.17 (7510) – Aug 24
Enhancement/Change:

- Bank Rec. Old bank rec removed from menu
- Bank Rec. Performance in Receipts vs Deposit screen when creating deposits vis drag n drop
- Bank Rec. Errors will now default to unchecked in new period
- Bank Rec. Activity now serialized and logged on the bank end server

Fixed:

- Bank Rec. Checks. Cleared/Outstanding flag now applied to non-grouped display

Release 1.6.16 (7503) – Aug 21
Enhancement/Change:

- Dashboard. Time Overview. Added legend to printout.
- Bank Journals. "Show As" option will now show deposit slips information in place of receipts.
- Bank Journals. "Show As" option triggers date filter to test shown dates (vs entry date)
- Client Ledger. Alternate template that will show AP check numbers on expense entries (slow)
- Payable Views. GL account number and name now shown
- Payable Views. (US Only) GL account numbers now shown on Purchases Journal
- Payable Views. (Non-accrual) GL Summary section will now be shown
- Language Files. Updated to be more consistent and with corrected speling (lol).
- Third-party packages.

Fixed:

- Dashboard. Time Overview. Year total now shows if zero
- LawPay. Trust payments made via direct portal link caused crash (lack of file provided)
- Credit Card. Operating In "Processor button" not present if merchant didn't have trust account

Release 1.6.13 (7480) – Aug 17
Enhancement/Change:

- NEW Dashboard. Time Overview. Year at a glance for the entire firm. Drill down to individual heatmaps for a month supported. Ability to get a PDF of the dashboard for easier review.
- Dashboard. My Time / Heatmap. Users with access can now view other users heatmap. No access to office entries. "My Time" dashboard replaced with "Heatmap" in this scenario.
- Dashboard. My Time/ Heatmap. Performance gains for current and previous months data.
- Dashboard / Preferences. Each user can now order their dashboards.
- Bank Rec. Grouping by check now defaulted on if grouping available.
- Reports. Ctrl + CSV will produce a PSV (pipe delimited) format.
- Various Third-party package updates
- Conversion. Elite conversion now supported

Fixed:

- Nacha. Minor issue with Nacha formats with older browsers.

Release 1.6.12 (7452) – Aug 7

Enhancement/Change:

- Invoicing. Ability to view / update (administrators only) next invoice number from screens
- UTBMS. Trademark codes now supported.
- Group Check Printing. Printed date/amount now stored with entries and integrated with the following:
    1. Nacha. It will now use the date/amount as opposed to recalculating from raw entries.
    2. Journals. Option to merge and how by printed date/amount.
    3. Journals. Drill down from merged entry is the detailed journal for that reference
    4. Bank Rec. Group by Check now groups by printed check (with print date); Ref not used.
- Time Entry. System option to restrict entries prior to date. Default is allow, but can be kept in lock-step with accounting restriction date or set to a future date.

Fixed:

- Invoicing/Credit Card. Links were not generated for trust replenishment only invoices.
- Batch Pay Payables. Process button may not be disabled properly
- Batch Pay Payables. Canada. Updated spelling to cheque.

Release 1.6.11 (7434) – Aug 4

Enhancement/Change:

- Invoicing. Combine Fee entry / Description invoicing now supported
- Invoicing. First Fee entry will always start on the same page (usually pg 1); large description could have forced it onto next page.
- Payment View. Sort by responsible is now supported across layouts.
- WIP Matter Summary. Now includes lawyer summary
- Batch Check Print/Release. Now shows total of selected items.
- Void Check. Reference number no longer will include the word "void"
- Banking Journals. Now ships with a compact "Register" view
- Banking Journals. Entries can now be sorted on a number of fields.
- Banking Journals. Voided checks now will show "che/voided" as payment type

Fixed:

- Nacha. Non-check types now filtered out.
- Nacha. Checks held for printing are now only included after being printed

Release 1.6.10 (7415) – July 24
Enhancement/Change:
- Invoice/Email Cover. Warning if logo is large. It may cause issues being shown (Gmail+Chrome)
- Batch Check. Ability to show Memo field
- Payable/Payment/Vendor Views. Now can filter by Vendor tag
- Trust Ledger. Reference field made wider

Fixed:
- File Manager. Billed Worked Hours was not showing correctly

Release 1.6.9 (7409) – July 23
Enhancement/Change:
- NEW Reports. Ledger Views. Cost Analysis and Cost Analysis Summary reports available.
- Initialization. Canada. Tax Labels set according to region.

Fixed:
- Batch Print/Release Checks. Override of check numbers now allowed with "never print"
- Bank Views. Void entries filtered out. Also caused running balance to not show.
- Nacha. Total Amount token did not calculate correctly
- Transfers from trust. Negative trust balance warning loop
- Credit Card. Trust account entries not shown correctly

Release 1.6.8 (7398) – July 20
Enhancement/Change:
- Banking. Wire category now supported

Fixed:
- Nacha. Same check numbers are now combined into 1 entry in file
- Check Printing. Operating combined checks did not accrue taxes correctly.

Release 1.6.7 (7394) – July 19
Enhancement/Change:
- fattmerchant. Preview of Integration now available
- Tymetrix. New Electronic Billing support
- New Sign-on. A logoff notification will now be instantly sent to a logged in device.
- Invoices. Fee sections totals with alternate layout and not showing errors slightly adjusted
- Security. New method to determine if a user is already logged in.
- Packages. Various third-party packages updated to incorporate their fixes/changes.

Fixed:
- Vendor Payment View. negative payments may have been filtered out.
- Entries. Entries prior to bank rec may show the warning multiple times.
- Time Entry. Logic tweaked to recalculate amount only if the hours are non-zero
- PST Remittance. Screen/logic issues addressed.

Release 1.6.5 (7371) – July 11
Enhancement/Change:
- New Contact. If user selects vendor numbering, contact type is set to vendor
- New Sign-on. A logoff notification will now be instantly sent to a logged in device.
- Packages. Various third-party updates

Fixed:
- Heatmap. Sorting by file
- G/L. Cash system. Associated client was not shown in the payee field

Release 1.6.4 (7362) – July 9
Enhancement/Change:
- Security Settings. Redesign of contacts and files section
- Checks. Custom layouts now supported per account, per user, and per user + account. Contact support for assistance to configure.
- Held Email. Added a "Test Send Email" button.
- License/OVERAGE: We no longer support this billing arrangement. Additional licenses required.
- Packages. Various third-party packages updated to address their issues.

Fixed:
- Various minor UI changes
- Various minor Nacha changes and enhancements
- AP Views. Under rare condition, report may not generate

Release 1.6.3 (7337) – July 4
Enhancement/Change:
- Invoice Email Queue. Emails not sent are now held in a queue to be released later.
- Information Messages. Ability to download message into text file
- Packages. Various third-party packages updated.

Fixed:
- Bank Rec (new). Number of minor fixes based upon feedback
- Alert Boxes. Escape now exits.
- Alert Boxes. Scroll bar now provided for long content
- Security/Contacts and Casefiles. Slider controls now working correctly

Release 1.6.2 (7324) – July 2
Enhancement/Change:
- Nacha. Support for creating Nacha files.
- LawPay. Support for payments made via the firm portal now supported
- Financials. GL now shows the client name for AR records
- Heat Map. Ability to add time from heatmap to time sheet now supported
- Packages. Various third-party packages updated.

Fixed:
- Bank Feeds. Embedded ampersands caused parsing issues.

Release 1.6.1 (7294) – June 23
Enhancement/Change:

- UX. All checkboxes have been replaced with slider controls.
- Alberta. Final trust compliance – ready for certification
- Payables. Matters affected now show on check stub
- Bank Reconciliation. Pre-release of totally reworked screens with added abilities.
- Bank Reconciliation. Receipts vs Deposit report reworked.
- Bank Reconciliation. Ability to sort checks by check number.
- Packages. Many third-party packages updated.
- Invoices. Option to "Add Paid To" to expense now applies to Vendor names for payables
- Invoices. Ability to export the list of invoices to csv.
- Invoices. Ability to print PDFs for the selected invoices vs single vs all.
- Invoices. Approve/Release screens now allow users to test email prior to finalizing.
- Statements. Zero charge invoices no longer will be shown.
- Backup. Databases now forced/enable Full recovery mode to support minute backups.
- Backup. Database log files are now shrunk during the monthly backup.
- Entries. Will now requires user override if back dating to a closed bank rec period.

Fixed:

- Expense. Levy/TAF could not be turned off if file changed under some scenarios
- Quick Entry. Add to Sheet not showing when using timer from main menu.
- Adjustments. Error deleting invoice adjustments
- Invoice Deletion. Cash system with adjustments that created GJ adjustments. GJ not deleted.
- Batch Check. Ability to edit check numbers became disabled under some scenarios.
- Invoicing. Multiple file-level CC contacts while mass billing could create email failures.
- Invoicing. File-level CC contacts had communications recorded again main client; now CC.
- Money In/Out. "…" button is now back.
- Grids. Some rows were not properly highlighted during hover.

Release 1.5.81 (7239) – June 8
Enhancement/Change:
- Invoicing. Duplicate spacer lines are now removed.
- Invoice Cover. Ability to hide trust summary section.
- Invoicing/Email. Ability for contacts to have one attachment per invoice; not combined.
- Money Out. Payee names expanded to 200 characters

Fixed:
- Adjustment Security. Rare issue addressed.
- Email. Resource leak.
- Closed Period. PDF images displayed incorrectly.
- Money Out. Some check management options didn't work when Request Check disabled
- General. Switch routes quickly could trigger route mismatch alert.

Release 1.5.80 (7220) – June 1
Enhancement/Change:
- Invoice. "Text to show before entries" now honoured when alternate header feature used.

Fixed:
- Security. Administrators are always granted payable access
- File Group. Ignore Accounting Information / Must have trust balance dependency

Release 1.5.79 (7215) – May 30
Enhancement/Change:

- Invoice Adjustments. Ability to delete the most recent one with some restrictions
- Invoice. New feature to automatically mark Non-billable client work on invoice but not show.
- New Contact. From additional contacts will now prompt for number sequence (if enabled)
- Packages. Many third-party packages updates to accommodate their changes/fixes.
- Alberta. Trust Compliance reports created and submitted for approval.
- Expenses. Rates now processed to 3 decimals.
- Casefile/Contacts. Conversions now support importing of external references (accessed via API)
- Sign-on. Organization user emails now available via API
- Invoicing. Select Charges. Ability to view entire description without using "edit" function.
- General. Option to show case files in uppercase on reports, invoices, and other forms.

Fixed:

- User Queues. Did not probably tracked specially targeted organizations correctly
- Trust IN. Originating Bank and References not properly saved
- General. Various minor UI fixes.
- Invoicing. Select Charges. Entry would become de-selected if edited.
- Invoicing. Using "use current date" and setting a cut-off date prior to last invoice issue.
- Invoicing. Ignore Accounting Information option not working.

Release 1.5.77/78 (7142/7152) – May 18/19
Enhancement/Change:

- CSV Export. Numbers now formatted to 2 decimals places
- Sales Tax Report. Canada BC requirement.
- Closed Periods. Now includes GST, HST, and Trust Compliance closed periods.
- Contact View. New Layout to show Groups assigned.
- HST report. Switched report to show payments when paid; payables would show when entered.
- General. Improved grid display in several locations.
- Quick Timer. Added processing pop-up/block.
- Alberta Trust Compliance. Completed and submitted for approval.
- Browser Closing/Page Switching. Better handling of events to allow for snapshots to complete.
- General. Alternate method to determine snap-shot "path". Possible snap-shot issue with older method.
- Opening Balance. Can no longer make changes after invoicing performed.

Fixed:

- Payables. Prevent editing after payment has been made
- Invoice. Trust statement. Made date field wider to accommodate larger fonts
- Bank Rec. Trust Listing. New layout had conflict template id.
- Client Ledger. Date range was not exported to excel
- Invoice. Use Today option enabled. Date on PDF will use date on invoice vs today; can be different if date in top-right of screen is out of sync with the real today.
- Bank Rec. Outstanding entries may not carry forward correctly if edited.

Release 1.5.76 (7113) – May 10
Enhancement/Change:
- Invoices. File Group setting to ignore accounting tests. You can create invoices for 0.00 balance forward and 0.00 current charges.
- PST Tax Report. Data conversion to support new information.

Fixed:
- Adjust Invoice. Improved screen
- Casefile/Contact screens. UX adjustments
- Check/Payable. Check created through payable could have tax amount changed
- Client Ledger. Date range was not exported to excel

Release 1.5.75 (7102) – May 7
Enhancement/Change:
- Casefile/Contact. Notes now contain date and can be sorted
- Invoices. Option. If no new charges - you can now replace invoice number with your choice
- Receivable Reports. Last Receipt amount now includes all payments made on last receipt date.
- Ledger. New Fee Listing template shipped showing only the period entries; no balances.
- Checks. Redesigned and dynamic stubs to try to print more payable invoices when necessary
- Invoices. Ability to replace non-zero amounts with text (or blank) on fee/expense entries.

Fixed:
- User. Groups not shown in member of on initial load
- Contact Cover. List of invoices sorted by casefile

Release 1.5.74 (7090) – May 4
Enhancement/Change:
- Batch Check Print / Release Check. Check number can now be manual set for many types.
- Database. Orphaned files are now cleaned up; caused by old notifications being deleted.
- Documents. Retrieving documents from database optimized leading to quicker downloads.
- British Columbia. Full support for Trust Administration Fee: Entry, reports, and files status.
- Packages. Many third-party packages updated to include their fixes

Fixed:
- GL. Internal reporting data was not fully reset when the fiscal end of year changed
- Settlement Statement. Receipts Carried Forward entries hidden when invoice not specified
- Entry Validation. Invalid contact may generate cryptic message.
- Excel Export. If only page footers present with no page totals, then footers didn't output.
- Grid Cell. Disabled cells could still have data entered under some scenarios.
- Financials. Fiscal year internally set to more than a year from start date caused issues.
- Invoicing. Fee section totals w/wo discount with optional total enabled format tweaked.
- Invoicing. Fee section total did not include the discount when discount not broken out.

Release 1.5.73 (7047) – Apr 24

Enhancement/Change:

- Grids. Now supports Ctrl+C, Ctrl+V, and Ctrl+X without entering cell's edit mode.
- Data Entry Screens. After submitting, screens show "processing" message.
- Notifications. Are now only retained for 14 days.
- Adjustments. Removed ability to post to reserved GL account
- User Edit. Improved UI for changing passwords
- Release Invoice. Added Trust Available column
- Batch Check Print / Release Check. Check number field now optional for all but checks.
- Batch Check Print / Release Check. UI now provides feedback when check numbers editable

Fixed:

- User Edit. When saving invalid password, cryptic error was shown. Save now prevented.

Release 1.5.72 (7033) – Apr 20

Enhancement/Change:

- Views: Font. On cloud, you may now access the Lato font family
- Time Entries. UTBMS. Now an option to require an activity code (default on).
- Invoices. Option for discounts to be broken out in totals.
- Receivable View. Group by responsible will now show responsible' name and totals.

Fixed:

- A user who closes the first GL period could still access the GL opening balance feature until logging off.
- Invoicing. Alternate Amount Layout. Tweaked with Rate column enable.
- Casefile Opening Balance. UTBMS file could cause an error.
- FireFox. View scrolling now works.
- Payable. No longer able to delete with multiple payments netting to zero.
- Invoices. Split bill where one of the splits is now zero but had a previous balance would cause a math error if any of the fees or expenses were selected/unselected through Select Charges.
- Bank Rec. Could hang while trying to initialize the first bank rec under some circumstances.

Release 1.5.71 (7013) – Apr 15
Enhancement/Change:
- Settlement Statement. Single invoice selected. Will now show date of invoice; was today.
- Invoicing. Ability to hide Amount column for fee section (alternate layout option)
- Close Period. Re-opening. Additional warning if deleting opening balance period.
- Bank Rec. Re-opening should now reset to state just before closed; was a total restart.
- Batch Check Print/Release Check. Added sorting.

Fixed:
- Dashboard. Daily Time. Hours title incorrect if working hours enabled.
- New Payable. Contact Id was not saving correctly. Additional checks also added.
- New Payable. Contacts were being shown in addition to vendors.
- Contact/File Information Popups. Would not close if launched from within files and Edit clicked.
- File Manager. Contact roles didn't always open on dbl-click.
- Deposit Slip. Added special sorting for File column

Release 1.5.70 (6993) – Apr 10
Enhancement/Change:
- Receivable Views: Tokens for Additional Payee number and name

Fixed:
- Single Check. Minor changes discovered during testing
- Invoicing. Transfers may not show invoice number in explanation

Release 1.5.69 (6986) – Apr 9
Enhancement/Change:
- **Check Printing. Single Check**. Batch releasing checks/transfers can be combined onto a single physical check. Configurable in firm->settings->banking. This does not affect accounting.
- Contact View. Tokens for printing introducing and/or gl percentages now available.
- New Payable. Vendor address added to screen
- Deposit Slip. Grid columns now sortable

Fixed:
- File Opening Balance. Erroneous error could occur during editing.
- Release Check. Could get loading error if snapshot not found

Release 1.5.68 (6970) – Apr 7
Enhancement/Change:
- Referral Source. Expanded to 1000 characters; first 40 need to be unique.

Fixed:
- Invoicing. Finalizing invoice in closed period caused issues.
- Check Requests. Backdated entries could cause problems.
- Invoicing. Email. New logic could overwhelm some email servers.
- Invoicing. Server error during accounting save could still generate emails

Release 1.5.67 (6963) – Apr 5
Enhancement/Change:

- Invoicing. New token: _CASEFILE_RESPLAWYERFULL_ - shows full name of responsible lawyer
- Invoicing. Fee Section. You can now include Activity Code (never, draft, or always).
- Payable/Checks. Non-Accrual only. Option to Preserve Allocation Lines in checks. This allows for payable info to flow through to the GL. The default is to show the payable memo.
- Conflict Search. Exact match now supported via the use of ~. Use "John~Smith" to search for exactly "John Smith" exactly; "Smith, John" will not be found.
- Cloud server metrics now stored permanently.
- Request Check. The requested date is now shown on the release check screen
- Integration Partners. A single user connection has a quota applied. Extra licenses available.
- Excel. Date and Amount fields are formatted better. Number in text field error suppressed.

Fixed:

- Cloned window. Receivable reports were missing
- Check Requests. Allow deletion even if they are in a closed period
- Default Entry Date. Could be blank under rare scenarios
- File Opening Balance. Could show erroneous warning about using a reserved GL account
- Request Check. Removed the option to Void.
- Request EFTs. Removed the ability to set the check number
- Client Ledger. AP entries have been re-categorized from "other" to "hard costs"
- Operating Out. Would not display the GL account on Canadian systems
- Check Requests. Back-dated requests could be saved in a closed period.

Release 1.5.66 (6923) – Mar 29
Enhancement/Change:

- Invoicing. Major optimizations to improve speed. Some tests were over 75% faster.
- Blended Tax Payments. You can now choose how payments prioritize:
    1. Taxes, hard costs, soft costs, then fees. This is the default.
    2. expenses + expense taxes then fees + fee taxes. Hard and soft cost are combined.
- Various third-party package updates

Fixed:

- Monitor Thread. Shutting down worker 1 would also shut down worker 10
- New Dataset. Creating a new set of books could fail
- Time/Expense Import. Date format wasn't reset between imports

Release 1.5.64/65 (6907) – Mar 23
Enhancement/Change:

- Maintenance Thread. Databases/firms not yet fully configured now skipped
- Bank Balances. Now uses paging logic to handle extremely large data sets.
- Database. Optimizations for recalculating bank balances
- Time Entry. Added ability to include a date format in the custom mapping field

Fixed:

- Maintenance Thread. Multi-core servers could cause bank balance recalculations to hang

Release 1.5.63 (6888) – Mar 17
Enhancement/Change:
- Database. Various optimizations and fixes found during testing of .1.5.62

Fixed:
- Invoicing. Select Charges. Prevent users from editing trust transfer created during billing

Release 1.5.62 (6877) – Mar 16
Enhancement/Change:
- Various. Screens now respond to more tax setting configurations
- SQL. Changed default locking to ReadUncommitted. Meaning no locks so performance benefit at the expense of higher risk to reports being affected.
- Data Entry. All entries now go through queuing mechanism. Provides better metrics and isolates entry failures from affecting web servers
- Worker Services. Monitor service will now randomly choose which workers to start/stop.
- Invoicing/Split Contacts. If an invoice involves multiple contacts, each will be assigned a unique invoice number with the same base plus "-1", "-2", etc.
- Invoice Requests. Now supports threading to speed up process. Does not apply to finalize.
- Packages. Various third-party packages updated.

Fixed:
- Trust IN. File with negative balance could cause erroneous message
- Data Entry. Add Contact while in drilldown could cause duplication of entry being edited
- File Manager. Document upload would fail if file name contained #
- Casefile Balances. Some exceptions could lead to items not being properly released
- Settlement Statement. Could generate a math error if special/directed charges where present.

Release 1.5.61 (6853) – Mar 8
Enhancement/Change:
- Database. Cloud version. now only uses primary database…should be faster.
- Report/Invoices. Queues enabled. Scheduler now checks more frequently.

Fixed:
- Close Periods. EOY adjustments popup now designed to fit to screen for better readability.
- Close Periods. EOY adjustments didn't factor in opening balances correctly in some situations.

Release 1.5.60 (6844) – Mar 5
Enhancement/Change:
- CouncelLink. Electronic billing format now supported
- Database. Serialization of database now routed through a queue vs database serialization.
- Database. Reverted to RepeatableRead locking for transactional support
- Casefile Balances. Now uses paging when potentially updating a large number of casefiles.

Fixed:
- Approve Invoice/Select Charges. Selecting/deselecting charges could cause exception
- Invoice Help. A contact with several thousand invoices may not show any invoices

Release 1.5.59 (6835) – Mar 4

Enhancement/Change:
- User Invites. Can now be resent with a new code by re-saving the pending user
- Packages. Various third-party packages updated

Fixed:
- Invoices. Trust balance could show zero if account not specified in File Group
- Statements. Year End adjustments not properly reset under some scenarios

Release 1.5.58 (6829) – Mar 3
Enhancement/Change:
- Trust In. Now allows for negative entries to allow reversal of credit card transactions.
- API. Time entries can now store an external Id for linked packages
- Close Period. Closing a period no longer causes fake period data to be created. Faster.
- Casefile new/manager. Double click on contact will show client info.
- Casefile new/manager. Double click on additional contact will show client info.
- Performance. Some SQL queries were optimized.
- Performance. Transaction locking scheme changed to enhance performance.
- Maintenance. Hitting "Update" from Current License popup now runs all daily activities.

Fixed:
- General Ledger Accounts. Sorting did not work if another static list screen was previously used.
- Rate Groups. List could become unsorted if a drill down to item was cancelled.

Release 1.5.57 (6812) – Feb 24
Enhancement/Change:
- LawPay Integration. Pre-release now available.
- Invoicing. Allow multiple simultaneous printing to happen; serialized with other requests
- Time Import. If description is supplied but is blank, activity code will auto fill.
- Invoice Contact Cover. Now supports text after signature and text after totals custom fields; the later will replace "Please review attached invoices"
- Invoicing. Maximum trust available is now lowest of balance as of end data and current balance.
- User Preference. Set maximum number of items in help list. Defaults to 20.

Fixed:
- Banking. Deletion of held banking entries could cause complete recalculation of balances
- Contact View. Did not properly display roles
- GL Opening Balances. Now deletes temporary closed period records when trust recalculated
- Void Money Out. Could cause issues in Batch Check Print if not printed yes
- Invoice Search. Direct search matches may not be shown if many entries start with value

Release 1.5.56 (6762) – Feb 6
Enhancement/Change:
- Browser Check. Notice to users if they leave browser open overnight and version update occurs
- Invoices. You can set the title for both Federal and State tax lines via tax groups

Fixed:
- Check Request. Failed security check
- Invoice Transfers. Could fail if Force Request printouts is enabled
- Contact View. Referenced child rate groups on a case would appear blank on report.

Release 1.5.55 (6752) – Jan 30
Enhancement/Change:
- Request Check. System option to always require a request printout.
- Money Out. Request with printout warning if user does not have View access (can't print)
- Invoicing. New Token {_CLIENT_COMMUNICATIONMETHOD_} available
- Invoicing. Zero Invoice and Finalize invoice with use "today" for finalize date will now use the Soluno "today" date in the upper right corner. This gives ability to back date invoices.
- Soluno "today" date will now prompt at midnight and 7:30AM if the user wants to update to new date.
- Various third-party package updates including PDF engine
- OpenInvoice. Support for custom user layouts.
- OpenInvoice. Cost Center will use matter level (default) or activity code from entry.
- Office. Event synchronization optimizations. Heatmap should be much faster. Note accessing an old month could trigger a full synchronization for that month (very slow).
- API. Webhooks now have a much shorter timeout to increase throughput

Fixed:
- Approve Invoice. Changing multiple disbursements would fail with only the first working
- Transaction Levy. Incorrect warning if posting the transaction levy liability.
- System. Possible memory leak if exception occurred while downloading file/report.
- Money Out. Vendor defaults work again.

Release 1.5.54 (6726) – Jan 27
Enhancement/Change:
- Notifications. Reworked internal engine to be more efficient.
- Servers API. You can now retrieve the number of active connections to the server.

Fixed:
- Office Integration. Microsoft filters changed and all emails were being downloaded often.

Release 1.5.53 (6722) – Jan 24
Enhancement/Change:
- Conveyancer Documentation added
- Operating In/Out. More load and access optimizations.
- Conversions. More supported and various enhancements.
- File Summary Bar for File Information and File Manager now shows assigned and lead initials.

Fixed:
- Money Out. Default for check management was not set correctly if release access not granted
- Large PDFs. Another attempt to get extremely large files to download. More diagnostics.
- Close/Re-open Financials/Adjust opening balances. Extra data cleanup to avoid future issues
- Security. 2-factor app couldn't validate during logon under rare conditions
- "Check Request" printing got routed to "Check" printing event handlers in some scenarios.
- Client ledger. Label for "other" entry types was incorrect
- Close Period. Accounting restriction date set ahead too far by a year.
- Close Period. Could create 2 EOY adjusting records under some conditions.
- Close Period. One lengthy operation was being performed twice.

Release 1.5.52 (6694) – Jan 19
Enhancement/Change:
- 2-Factor Authentication. Firms can now enable for all users.
- Money In. More speed optimizations when drilling down to entry.
- Installer. Upgraded to latest version / Install .Net 4.8 as necessary
- Money In/Out. Reworked screens to be consistent and view more entries.
- General. Rearranged some js/html code to load some screens quicker (first time).

Fixed:
- Views. Manage Templates. Border around button removed.
- Money In. Auto Allocation working again (broke previous).

Release 1.5.50/51 (6683) – Jan 17
Enhancement/Change:
- 2-Factor Authentication. Can no longer be enabled without Email and/or Phone verification
- Money In. Partially optimized loading of large receipts in drill down.
- Money In. Only outstanding invoices are now downloaded and shown initially.
- Statements. Added Start date filter

Fixed:
- PDF. GDI Memory leak fixed (via 3rd-party new release)
- Money In. addition popups should no longer appear behind the invoice list popup

Release 1.5.49 (6658) – Jan 14

Enhancement/Change:
- NEW Security. Authenticator Applications now support for 2-factor authentication.
- Heat Map. Summary records now stored in the database for quicker/more consistent loads.
- Invoicing. Combined Invoice Cover + Invoice can now use continuous page numbering.
- Invoicing. Combined Invoice Cover + Invoice can now supress heading on page 1 of invoice; uses "other" page header.
- On-Premise. Support for easier conversions to the new architecture.

Fixed:
- Conversions. Multiple importing of GL Opening balances records.
- Receipts with Tax payments under non-accrual generated incorrect warning.

Release 1.5.48 (6636) – Jan 10

Enhancement/Change:
- NEW. Electronic Bill format – Open Invoice – preview version.
- Various third-party package updates
- Copyright updated to 2020

Fixed:
- General Leger Opening Balance did not show "Loaded from cache" message.
- Closed Period. Regression issue from last version.
- Productivity View. List of available templates didn't show for Canadian firms.
- Approve Invoice. Serialization of some activities wasn't correct.

Release 1.5.47 (6607) – Jan 7

Enhancement/Change:
- NEW. Request Requisition forms via Money Out Screens (reprint via My Documents)
- Server. More queue optimizations/tweaks.
- Server. Faster/better deletion of notifications.
- Server. Reduced number of grid layout snapshots sent to server.
- Server. Support firm data splits

Fixed:
- Deposit Slip Screen. Added ARIA attribute (accessibility)
- Balance Sheet. May produce empty report
- Balance Sheet. Report selection incorrectly showed filtering by account
- Form 9A/C. Resources were not being freed.
- Service Status page showed incorrect duration if service idle over 1 day.

Release 1.5.46 (6586) – Jan 3
Enhancement/Change:
- Server. More queue optimizations/tweaks.

Fixed:
- Invoice. _CLIENT_NUMBER_ token added

Release 1.5.45 (6582) – Jan 2
Enhancement/Change:
- Internal. Worker processes status. Duration now processed on server.
- Invoicing. Expenses with total line only could have amount right-indented if backing data had a mix of taxable and non-taxable items.

Fixed:
- Server. Improved queueing. Clean Queues off-hours only
- Server. Improved queueing. Don't delete snap-shot pause records in real time.
- Server. Improved queueing. Slightly slower polling to avoid thrashing under load.

Release 1.5.44 (6577) – Jan 1
Enhancement/Change:
- Contacts. New. Feature to have separate numbering sequences for vendor, clients, and "other".
- Invoicing. _SIGNATURE_ token now available

Fixed:
- 1099. Finalize button wasn't available.
- Time/Expense. Import could fail if two files with different date formats were imported.

Release 1.5.43 (6571) – Dec 30
Enhancement/Change:
- Contacts. Slight performance increase for firms without office integration
- Invoicing. Turning off all expense fields will now combine heading and totals into 1 line

Fixed:
- Data Entry. Screens loaded from cache when only date was loaded.
- Queueing. Slow machines could cause delete/read operations of snapshots to be out of order

Release 1.5.42 (6567) – Dec 30
Enhancement/Change:
- Approve/Release Invoice. Optimized data load on screens
- Batch Print/Release Check. Optimized data load on screens
- Follow Me information optimized
- Office. Firms not using office has optimization code to avoid unnecessary work

Fixed:
- Notifications. Only one browser session was sent notification. Now all are notified.
- Search Lookup. Many unnecessary calls were made to the server during some screen loads

Release 1.5.41 (6556) – Dec 22
Enhancement/Change:
- Performance. Dynamic tuning of report/invoice worker threads. Services scaled up/down as necessary depending on load

Release 1.5.39/40 (6552) – Dec 21
Enhancement/Change:
- Performance. Support to separate reporting and invoicing generation into their own processes. Isolation allowing for monitoring/metrics, better scaling, and crashes no longer affect all firms.

Release 1.5.38 (6544) – Dec 19
Fixed:
- Grid Errors. Changed from hard code red to theme variable
- Reports. Switching away from report before initial page shown would cause unnecessary network requests.
- Reports. Hitting "stop" never sent the request to the server to stop generation

Release 1.5.37 (6540) – Dec 18
Enhancement/Change:
- Performance. Data compression added to data to reduce database size and increase speed

Fixed:
- User Invites. Failed if firm email not configured correctly.

Release 1.5.35/36 (6532) – Dec 17
Enhancement/Change:
- Batch Che Printing/Release Check. Optimized matter information load
- Notification Server support. Notifications can now run outside of main web site

Fixed:
- Office. Conflict with multiple users configured to same account
- Transaction Levy. Configuration conflict if accounting method set to use names

Release 1.5.34 (6517) – Dec 12
Fixed:
- Maintenance Thread. Now runs with enhanced security to allow proper activities.

Release 1.5.33 (6514) – Dec 11
Enhancement/Change:
- Maintenance Thread. Now will check for orphaned report entries.

Fixed:
- Client Ledger did not show "Paid To" for payable entries
- Search Caches may crash when no contacts/casefiles have been added yet
- Reassigning a file to a different contact doesn't force a cache update
- Financials. If the year end setting is not configured, financial records may not get created
- Reports. Large reports when deleted may orphan page records due to SQL timeout
- Invoice. Billing notes didn't properly decode json encoded strings
- Financials. "Fake" closed period records no long recalculate based on time entries
- Office. If you change your Microsoft Credentials you likely will have to re-authorize.

Release 1.5.32 (6503) – Dec 10
Enhancement/Change:
- NEW. Invoicing. Ability to include billing notes on invoices via custom token
- Web Hooks. Added support to get original and new IDs for audit trail entries
- User Invites. Will now use Soluno Email if the Firm's email is not configured

Fixed:
- Profile Settings. Validating email/phone numbers crashed
- Vendor Arrangements. Internal fault generated (ignored)
- Browser Performance. Several event handlers were not un-registered when no longer required caused memory leaks and performance issues over time.

Release 1.5.31 (6495) – Dec 9
Enhancement/Change:
- NEW. Contacts can now have an "Additional Payee" added. Money In will pull invoices related.
- Office. Minimized that number of times synchronization occurs. Contact retrieval much quicker as a result in most situations.
- Office. Server memory cache added for office contacts to minimize database access.
- Office. Emails and Events storage reduced to 1 year plus linked items from any period; was 2.
- Heat Map. Server memory cache created for monthly data. After initial loading, the database entries don't have to be re-read for months not changed.
- Operating IN. For clients with lots of invoices, search invoice results now only send back outstanding and current (1yr) invoices. Old paid invoices are no longer processed. Specify a case file if older invoices are required.
- Operating IN/Payables. Casefile information is now retrieved in batches (performance)
- Financials. "Fake" closed period mechanism added that should greatly help firms who either don't close or are way behind in closing periods and require current financial reports.

Fixed:
- Data Entry could show errant message with records to opening balance invoice entries
- Profile Settings. Requests for office information reduced to screens that actually use it.
- Profile Settings. Crash could occur if a user's office credentials are invalid (rare scenario).
- Profile Settings. User with multiple root email folders would show blank list

Release 1.5.30 (6464) – Dec 3

Enhancement/Change:
- API – New Web Hooks for accounting information
- API – Extra security measures added to ensure trusted access to data
- Office. Initial synchronization now serialized to avoid server overload.
- Office. Entries no longer synchronized upon sign-on...new wait until needed.

Release 1.5.29 (6457) – Dec 1
Enhancement/Change:
- Heatmap - daily view - don't auto expand time section if office events present

Fixed:
- Office View. Events linked to multiple time/expense entries would crash report when 2nd reference encountered.
- Office Events. Occurrence records may not be retrieved correctly for all periods

Release 1.5.28 (6453) – Nov 30
Enhancement/Change:
- NEW. Office Ledger View. Shows office entries associated with case files
- NEW. Casefile Manager and Casefile Information popup shows Office Ledger View
- NEW. Office entries can be associated with a file without creating a time/expense entry
- Office entries can be de-associated from a file via trash can on Office Ledger View.
- Quicker server start-up
- Data Conversion. Support for importing tax groups
- Views. Fields with drill down info now show pointer cursor and support single click
- Time zone for a user is now retrieved from Microsoft Office (if enabled)
- Office event detail popup now supports text content

Fixed:
- Office Sync. Various features now don't activate until initial sync finishes
- Office Contacts. Adding contact may fail if emails present due to Microsoft API change

Release 1.5.27 (6420) – Nov 21
Enhancement/Change:
- Performance. Maintenance thread can process multiple organizations at the same time.
- Batch Check Printing. Added user feedback if printing failed for any reason.

Fixed:
- Operating In/Out. GL Account incorrectly shown as required in some scenarios.
- Batch Check Printing. If an allocation was on a finalized invoice would fail without warning.

Release 1.5.26 (6409) – Nov 20
Enhancement/Change:
- Office. Security added to prevent all users to see everyone's events/messages

Fixed:
- Time/Expense. Can't delete entries not associated with office entry

Release 1.5.25 (6405) – Nov 19
Enhancement/Change:
- Heatmap. Column sorting added to messages and events
- Heatmap. Added folder and calendar columns.
- Heatmap. You can now create time/expense entries from daily heatmap or entry views
- Heatmap. Performance optimization for daily view (somewhat faster).
- Microsoft/Office. Changed message to clarify we only support MS Office 365 (not third party)
- Time. If user can't change time due to indirect security issue (see fixed), an admin override can be provided.

Fixed:
- Data Entry/Invoicing/Transfers. A user who doesn't have bank account security access who makes a change to a entry (time usually) that is on an request invoice where automatic transfer of trust to op has been enabled may cause corrupted the trust transfer to become corrupted.
- Quick Entry. Time entries could show rate and amount incorrectly depending on security.
- Ledger. Rate/Amount now hidden based upon security

Release 1.5.24 (6388) – Nov 15

Enhancement/Change:
- Data conversion to support new office features
- Cloned Window will now only show reporting features (even admin and power users)
- Warning for session open too long
- User Preference for Heat Map to automatically show up after signing in.
- Dashboard. Time/Heat Map. Events and emails now shown in daily view.
- Dashboard. Heat Map made to be first tab.
- Time View. Invoice numbers can now be shown for billed entries; time listing enabled.
- Time View. Working hours column hidden if feature not enabled.
- Time View. New Month and YTD summaries available. Defaults shipped.
- Productivity View. New Collections view and many views cleaned up.
- Batch Pay Payables. Case file column added to vendor grids

Fixed:
- Trust Opening balance refresh issue
- Batch Check printing didn't handle all server errors correctly
- GST/HST view could miss reporting a prior unreported entry if tax status changed
- Invoicing. Expense entries with tax exempt status could cause invoice to not get created
- Conveyancer. Additional fixes.
- Security. Ledger View will now be automatically be enabled if full view enabled.

Release 1.5.23 (6341) – Nov 4
Enhancement/Change:
- NEW. Support for Conveyancer in Canada
- Settlement Statement. New Filter. Ability to include invoiced only charges
- Dashboard. Time/Heat Map. Daily drill down now active (office items pending)
- Dashboard. Time/Heat Map. Better tooltips

Fixed:
- Time Sheet/Quick Time. Add to timesheet from QT
- Invoicing. Time entries marked billable, 0 hours, 0 amount caused math error

Release 1.5.22 (6325) – Oct 31
Enhancement/Change:
- Settlement Statement. Ability to specify Invoice filter (almost recreate a bill).
- Settlement Statement. Ability to specify No Entries Before date filter. Allows for discovery work to be excluded.

Fixed:
- Time Sheet/Quick Time. Adjusting working hours didn't auto recalculate amount.

1.5.21 (6322) – Oct 31

Enhancement/Change:
- NEW. Working/Billable hours can now both be entered, imported, and reported upon. Client ledger, Client Fees listing, and Time Listing views now show both billable and working hours
- Dashboard. Time/Heat Map. Yearly information now shown
- Dashboard. Time/Heat Map. User can specify either billable or working targets
- Dashboard. Time/Heat Map. Daily help information now shows more information
- Time Sheet/Quick Time. Default hours by task code implemented
- Time/Expense. Import of Conveyancer files now supported
- NetDocuments. "Forbidden" error creating workspaces no longer performs retry operations.
- Client Views. New token for check cleared status (CLR/OUT). Added to default CL and TL views.

Fixed:
- Grids. Icons not aligned on some grids if different rows had a different number of icons
- Bank Rec. Previous Checks/Receipt grids could behave oddly
- Utility. Reset data could cause some files not to be cached correctly
- Office. Possible database write issue if two machines try to update the same email/event

Release 1.5.20 (6304) – Oct 16
Enhancement/Change:
- Dashboard. Time/Heat Map. Monthly days worked progress bar

Release 1.5.19 (6301) – Oct 16
Enhancement/Change:
- Dashboard. Time/Heat Map. Ability to enable/disable individual working days
- Dashboard. Time/Heat Map. Ability to set default work week (user setting)
- Dashboard. Ability to set various monthly/daily target types
- Dashboard. Time/Heat Map. Monthly targets now shown
- Environment. Upgraded database engine, .Net framework, and various third-party packages
- Invoices. Ledes98B. Support for taxes via expense code
- Invoices. New option to only hide previous balance details if no balance forward
- Bank Rec. More transaction types supported

Fixed:
- Grids. Focus could be set incorrectly on cancel or after saving
- Checks. Memo field now restricted to 2 rows to prevent MICR overwrite
- Time/Expense. Import could create empty row
- Payment. Editing file could produce incorrect error message
- Dashboard. File. Totals trust was showing the last trust account balance and not total
- Dashboards. Scrolling now works in all browsers
- Data Templates. Auto Add functionality wasn't working
- Invoices. Select Charges could produce incorrect error message
- Invoices. Select Charges. Removing Receipt Carried Forward entries caused error
- Invoices. Adjustments done at time of billing may not split correctly
- Reset. Firms with large number of contacts caused various issues during rebuild

Release 1.5.18 (6244) – Sep 19
Enhancement/Change:
- Invoices. Text Changes. "Please review…complete details" to "Please review…details"
- Invoices. Font Name can now be specified. Font has to be available on server.
- Dashboard. Time/Heat Map. Will show up if only dashboard for a user
- Dashboard. Time/Heat Map. Responsive design implemented and better formatting
- Dashboard. Time/Heat Map. Gradient "bar" implemented for almost meets quota
- Dashboard. Time/Heat Map. Monthly totals now shown.
- Data Templates. Edit grid now has icons in grid.

Fixed:
- Grids. Some grids lost the double-click ability to drill down.
- Settlement Statement. Broke on last build.
- Data Template. Couldn't delete if was ever used; even if no longer used.

Release 1.5.17 (6230) – Sep 17
Enhancement/Change:
- Casefile/Contact Managers. Additional security applied to ledger tabs
- Invoices. Trust. Disbursement column removed if no disbursements
- Invoices. Trust. Option to hide trust entries before a date whether on a previous invoice or not
- Address. Copy button replaced with icon in all locations
- Grids. Better support for many rows of data
- Office. Calendars and Email folders can now be integrated
- Dashboard. Time/Heat Map. PREVIEW ONLY. See your month at a glance
- Copy/Paste. Behaviour changed to better mirror native behaviour
- Data Template. Fields are now sorted alphabetically. Hint: prefix with 1. 2. 3. To force order
- Data Template. Re-using the name of previously deleted template now supported

Fixed:
- Data Entry. Removed ability to remove file number from entry that was invoiced
- Data Template. Duplicating a template didn't work as intended
- Reports. When exporting, report could be shown as aborted incorrectly

Release 1.5.16 (6196) – Sep 10
Enhancement/Change:
- Invoices. Ability to hide total section
- Invoices. Ability to customize page 2(+) page heading
- Contact/File screens. More UI changes; map and copy buttons
- Support for detecting page/browser exit to give a chance to flush the snapshot data
  Implemented for time and expense sheets

Release 1.5.15 (6189) – Sep 8
Enhancement/Change:
- Invoices. Fee headings changed to 1 line
- Invoices. Option added to suppress adding section heading to total lines
- Invoices. Option to have the Trust Statement to be shown first
- Invoices. EXPRESSION support added within text fields
- Invoices. New Trust Tokens Available:
  _TOTALSAMOUNT_TRUSTOPENING_,
  _TOTALSAMOUNT_TRUSTCLOSING_,
  _TOTALSAMOUNT_TRUSTIN_,
  _TOTALSAMOUNT_TRUSTOUT_
- Contact/File screens. More UI changes

Fixed:
- Vendor Ledger not showing options in Contact Manager
- GST/HST Opening Balances. Amount field could be editable incorrectly causing data issues
- Ledes 98/Ledes 98BI. Discount entries weren't being included
- Invoices. Added the word "FEES" to the Total line label to be consistent with other sections
- Users being accidentally disabled. Timing issue resolved.

Release 1.5.14 (6164) – Sep 4
Enhancement/Change:
- Contact/File. More UI changes
- File Balances. AR balance bolded and title changed to "AR / Amount Due"
- Dashboard – File. Security added to Contact File Groups to further limit what is displayed.

Fixed:
- Dashboard – Banking. Accounts with some access but not view balances access may be shown

Release 1.5.13 (6155) – Sep 3
Enhancement/Change:
- Contact/File. More UI changes
- Office. New data table used to handle a large number of contacts. Data Conversion!

Fixed:
- Casefile Info. Trust balances are back.
- Request Invoice. Multiple requests to server could be made.
- Settlement Statement. Better handling of data

Release 1.5.12 (6145) – Aug 29
Enhancement/Change:
- Conversion. Added support for custom data
- Address/Phones. More communication and copy icons added
- Contact/File selection now handles Enter key
- Invoicing. checks to prevent entries with a date after the invoice date from being processed.
- Contact/File popups will now show both company and individual names (primary top)
- Invoicing. New option to include case file number in header on subsequent pages

Fixed:
- Users who get locked out could get permanently disabled.
- Views/Deposit Slip. May show settings from prior run view causing memory corruption.

Release 1.5.11 (6122) – Aug 27
Enhancement/Change:
- Dashboard activated with Banking and File Tabs
- Map button added to main address.
- Added copy functionality to IE/Edge/???

Fixed:
- Contact View. Filter by Resp Lawyer may include files where the lawyer was once resp
- Various Views. Trust information may not be shown
- Side Menu. Some minor display changes.
- Notification Icon. Some minor display changes
- Timer animation. Removed focus frame under Chrome.
- Copy Address. Better formatting of name component

Release 1.5.10 (6109) – Aug 26

Enhancement/Change:
- Converted more messages to new format
- "Map It" feature now available for many addresses
- Contact Mangers. Icons moved to within grids as per standard
- Timer now has animated icon for better visual feedback
- Text boxes. Soluno Context Menu no longer will appear. Default browser menu will appear allowing for spell checking.
- Internal changes to support pending dashboard feature.
- Internal changes to help with diagnostics

Fixed:
- Timer Colors corrected
- File/Contact manager UI issues for collapsible sections
- Settlement Statement crashed under some expense configurations

Release 1.5.9 (6092) – Aug 21
Fixed:
- New popups showing/hiding properly

Release 1.5.8 (6086) – Aug 20
Enhancement/Change:
- Removed auto-focus in grid feature
- Support for custom short and long date formats. Has to be configured by support.
- Updated PDF engine.

Fixed:
- Hitting ESC didn't always close windows in the correct order.
- Static lists didn't always reflect edited changes immediately

Release 1.5.7 (6072) – Aug 17
Enhancement/Change:
- Casefile Manager. Added general and trust balances.
- Invoicing. Added Settlement Statement available via Request Invoice screen with file entered.
- Settlement Statement. Will use bill display called "settlement" if is available.
- Time Listing. Added alternate layout (only one summary)
- Favorites. Configured via user settings. Available via context menu (right mouse-click)
- Reports. Removed security restrictions applied to PDF files.
- Invoice Screens. Moved options into auto complete box to provide more screen for viewing.
- Invoicing. Name of email attachment renamed to start with "invoice" (was "statement")
- Invoicing. Contact covers now tests for multiple invoices using the same invoice number. If all use the same, the _INVOICE_NUMBER_ token will be active.

Fixed:
- PDFs could be corrupted if the same pdf was merged multiple times. Possible in large release invoices.

1.5.6 (6048) – Aug 13
Enhancement/Change:
- Invoicing. New tokens available:
    1. _TOTALSAMOUNT_PREVIOUSBALANCE_
    2. _TOTALSAMOUNT_PAYMENTS_
    3. _TOTALSAMOUNT_ADJUSTMENTS_
    4. _TOTALSAMOUNT_INTEREST_
    5. _TOTALSAMOUNT_BALANCEFORWARD_
    6. _TOTALSAMOUNT_NEWFEES_
    7. _TOTALSAMOUNT_NEWDISCOUNT_
    8. _TOTALSAMOUNT_NEWSERVICES_
    9. _TOTALSAMOUNT_NEWEXPENSES_
    10. _TOTALSAMOUNT_NEWCHARGES_
    11. _TOTALSAMOUNT_TAXESFEDERAL_
    12. _TOTALSAMOUNT_TAXESSTATE_
    13. _TOTALSAMOUNT_RETAINERSAPPLIED_
    14. _TOTALSAMOUNT_TRUSTRETAINERSAPPLIED_
    15. _TOTALSAMOUNT_CURRENTINVOICE_
    16. _TOTALSAMOUNT_BALANCEDUE_
    17. _TOTALSAMOUNT_RETAINERMINIMUMCHARGE_
    18. _TOTALSAMOUNT_PLEASEPAY_
- Invoicing. Approve and Release screens can now create PDFs in either draft format or finalized format for easier reviewing of what will be create for clients.
- Invoicing. Automatic creation of payables by Percentage now shows Hours as a notation.

Fixed:
- Improvements to pop-ups/windows showing up behind other windows.

Release 1.5.5 (6043) – Aug 12
Enhancement/Change:
- Added new cover sheet subject line token: _INVOICE_NUMBER_; blank if multiple referenced
- Further database caching to improve performance.
- Canada. Default cheque templates updated to fit window envelopes better.
- Excel. More "footer" detail emitted in many situations.
- User Preference to control which context menu to use by default.

Fixed:
- Invoice Select Charge. Restrict receipts up to date to be no later than the invoice date
- Reports. Entry number showing invalid in some scenarios.
- User Delete option has been removed to preserve reporting information. Call if needed.
- Casefile balances may not reflect operating retainer balances if last banking transaction was a refund or transfer to another file.

Release 1.5.1/2/3/4 (6016) – Aug 8
Enhancement/Change:

- UI/UX – updated theme; palette, icons updated, and new sign-on screen
- UI/UX – use of transitions for warnings and some notifications (work in progress)
- UI/UX – Major overhaul of file and contact information popup screens
- UI/UX – Context Menu to access matter/contact info from anywhere
- UI/UX – New tooltip engine; no longer covers useful information on grids
- UI/UX – Chrome only. Grids cell auto selected as you hover over cell
- UI/UX – ability to launch email, phone, or web site from within various screens
- UI/UX – ability to copy address blocks from most screens; name included.
- Office Integration – Contact Sync now supported
- Reports -- Major redesign of how to request and export views
- Reports – Excel export will now use friendly names if available and sort columns by type + name
- Reports – Client Ledger. New Period Expense view added
- Many third-party packages updated
- Internal – reworked access to security layer to support multiple data centers efficiently
- Internal – combined several JavaScript files to improve loading of site
- Extended the number of characters allowed for Referral Source
- Operating In – Invoice popup list is now sortable
- Bank Rec – minor UI improvements
- System – ability to specify currency symbol; replace $ with € or USD
- System – link to our preferred cheque printing vendor in Canada added
- Time Entry – ability to hide activity code column
- Invoicing – new token available: _CLIENT_EMAIL_
- Financials – PL. Clicking on YTD column will drill down to detailed GL with YTD date range

Fixed:

- Memory Leak in controls that may cause slowdown over time
- Batch Check Printing may produce console error if no bank account was selected on load
- Opening Rate Group History caused an error
- Client Ledger. Restriction that expenses would be hidden for vendors when user didn't have access to vendors was removed
- Excel was removing page header fields during output
- Invoicing/Select Charge screen was not showing the client and file information correctly

Release 1.2.91 (5822) – Jul 3
Enhancement/Change:
- Casefile balance recalculations optimized

Fixed:
- Data Entry – Banking. Force reset of bank balance cache to force retrieving current balance.

Release 1.2.90 (5822) – Jul 2
Enhancement/Change:
- Third party updates including pdf creation engine.
- Balance Engines SQL queries optimized so data entry screens should load quicker.
- Office. Contact automatic sync implemented. BETA only.

Release 1.2.89 (5803) – June 21
Fixed:
- Contact Cover. Logic to show/hide trust column reversed.
- Invoices. Transfer memo now reflects changes made through edit charges screen.

Release 1.2.88 (5800) – June 21
Enhancement/Change:
- Invoicing. New Option. Always Show Lawyer details. Applies to initials and fee summary when only one lawyer on an invoice. Normally, these fields are hidden.
- Conflict Check. Street address lines beginning with "c/o " will now be included in check

Fixed:
- Bank Rec. Very rare condition that reports don't align with screen information.
- Statements. If user requests a BS earlier than last GL produced without requesting a GL for the new period first, then the BS may include newer data.
- Startup/First Month. Entries were being incorrectly restricted from being dated prior to the system start-up date.
- General Journal. Brought back ability to specify the same posting reference multiple times.

Release 1.2.87 (5789) – June 11
Enhancement/Change:
- Operating/Trust History View. Explanation no longer wraps.
- Contact Cover. Date Shown will now be the date of the newest invoice listed.
- Rate Utility Screen. Reworked to be more intuitive.
- Performance. Recalculation of bank balance records no longer processes all records when deletion or account changed on entries. Now processes from the month of entry onwards.

Fixed:
- Static Lists. Button columns resized so all icons are shown
- Contact Cover. Please Pay no longer includes balance forward if only showing current entries.
- User Groups. Fixed name field to limit to only 20 characters.

Release 1.2.85/86 (5777) – June 9
Enhancement/Change:

- Chat. Chat icon now reduced in size to avoid overlaying useful information. Reports window has been adjusted so that scroll bars should be visible.

Fixed:
- Bank Accounts/Rates. Incorrect security applied so that accounts/rates didn't always show.
- Accessibility. Added some missing labels.
- Settings. US Firms saw "Force Province for contacts". Now reads "…States…"
- Static Lists. Button columns resized so all icons are shown
- Performance. Reduced number of transaction locks applied.

Release 1.2.84 (5767) – June 4
Enhancement/Change:
- Europe. Support for new Europe data center.
- Chg/Fix. Invoice. Approve and Release screens. Added back the ability to filter by individual fee earner in addition to allowing by firm.
- Approve/Release Invoice. Various optimizations to speed up screen loading.

Fixed:
- Invoice. Don't reallocate for users in group now working.
- Time Sheet. "Default to Assigned Fee Earner" function now working.
- Security. Password expiration message was truncated.
- Bank Rec. delete and edit buttons missing on some screens.
- Multi-line Input box. In view mode, feedback wasn't provided.

Release 1.2.83 (5754) – May 31
Fixed:
- File Group Settings. Regression. Some new settings not saved properly.
- Operating In. Regression. Contact number may show up as invalid on drill down.
- Operating In. Regression. NSF button didn't always work.

Release 1.2.82 (5750) – May 30
Fixed:
- Invoicing. Regression. Contact Cover crashes if more than 1 casefile for a contact.
- Data Entry. Regression. Alignment of "i" button.
- Payment (AR) View. Invoice filter didn't work.
- Expense View. Responsible filter didn't work.
- Receivable View. Casefile Referral summary only showed lawyer referrals.

Release 1.2.81 (5742) – May 29
Enhancement/Change:
- Ledger Views. Ability to have the last operating receipt date in a page footer
- Invoice Approve/Release. All fee earners are now shown.
- European Support. Removed document lite tabs and backend support (privacy issues)

Fixed:
- Data Entry. Default bank account could be blank after switching books
- Quick Entry. Activity wouldn't fill into explanation unless file entered
- New File. Using file number by firm may be blank under some scenarios.
- Bank Rec. Drilling down on a check created through prior check would cause an error

Release 1.2.80 (5725) – May 26
Enhancement/Change:

- THIS VERSION INCLUDES A DATA CONVERSION TO SUPPORT THE NEW FEATURES. It should only take a few seconds to perform after the install, but for on-premise installations please ensure you have a backup.

- Operating In. File description added to invoice popup. Optional column.
- Operating/Trust Out. Reference field added.
- Operating/Trust Out. Option to void an entry without deleting original. Can be current dated.
- Data Entry. Added ability to delete entries via the edit screens after drilling down.
- Data Entry. Better use of caching mechanisms so edit entry screens load quicker with multiple allocations.
- General Journal. A posting reference can only be used once within an entry.
- Financial Statements. Integrated file and contact cache to improve performance
- Financial Statements. Data in now accessed in chunks to handle extreme volumes of data.
- Installer. Self-signing tools now included.
- Ability to print reference field as part of the memo on checks
- Ability to print file number(s) as part of the memo on checks
- Bank Feeds. Added support for Amex CC.
- Invoicing. Delete operations now use transactions for safety.
- Invoicing. New tokens: _CLIENT_DESCRIPTION_ , _CASEFILE_TOTALBILLED_, and _CASEFILE_TOTALTAXBILLED_. The last two are totals from case inception.
- Invoicing. New Fee Allocation Mode: Don't reallocate fees for members of groups listed.
- Invoicing. Option to add the check's "Paid To" to descriptions fields.
- Invoicing. We now store original rainmaker amounts for future reports.
- Invoicing. Legal Paper now supported for invoices, invoice cover, and contact cover
- Invoicing. Support for alternate text for zero amounts for fees and expenses.
- Invoicing. Support to show $ for fees, expense, and other amounts.
- Invoicing. Support to force hiding the tax number
- Invoicing. Option to not perform a page break before the trust summary.
- Invoicing. Ability to set the total title for "new charges"
- Invoicing. Ability to set the total title for the Trust Applied (if using new feature)
- Invoicing. Ability to hide balance forward details. Hides payment and adjustment sections and just shows the balance forward number. Only enabled if not using "show current charges only"
- Invoicing. Tax total title will now check to see if title set in tax group associated with file
- Invoicing. Review Invoices->Select charges. Taxable status now shown for expenses.
- Invoicing. Request invoice now requires a date.
- Invoicing. Request invoice will now warn if mass billing all files.
- Invoicing. Ability to exclude trust transfers from the retainer section; they still show in the trust summary. If enabled additional total tokens used.
- Invoicing. Ability to assign bank accounts for transfers in file groups
- Invoicing. Ability to restrict operating entries to only a single bank account
- Invoicing. Ability to exclude files that don't have a non-zero trust balance
- Invoicing. Ability to include files that only have a trust balance (no new charges)
- Statements. Entries now short by invoice entry date then invoice number.
- Statements. Statements reformatted when only one case file being referenced.

- Conflict Search. Entered names field changed from 150 characters to 32K. Separate each logical search by a semi-colon. Within each logical search all names must be found within an entity to trigger a hit.
- Reports. You can now specify a left margin in the settings->Features area.
- Ledger. Operating retainer balances no longer listed by individual account. This was to support allowing money from multiple accounts from being applied to an invoice during billing and having a balance carried forward.
- Static Admin Lists. Ability to copy an item.
- User and group screens now remember the column sorting
- General. Group lists now display "disabled" states better.
- Sign-in. Users with access to multiple book will now see firms listed alphabetically.
- Sign-in. Static lists are now cached on server to enable faster sign-in.
- Integrations. Services support so third-party applications can be notified of events.
- Conversions. Better logging.
- Many third-party package updates to improve reliability.

Fixed:
- Data Entry. Default bank account could be ignored under some scenarios.
- Adjust Invoice. Cancel button was disabled
- Adjust Invoice. Upon drill down no field had focus
- Invoicing. _CLIENT_EMAIL_ token when no email address
- Invoicing. Fee only allocations changes while keeping total fee amount the same being ignored
- Invoicing. Dollar sign missing on total lines.
- Invoicing. US templates updated with default tax titles.
- Invoicing. Invoices could be deleted if a transfer payment was made after invoice created.
- Invoicing. Under some scenarios an invoice could fail and not provide a notification/details on why.
- GST/HST. Large numbers cut off on report
- GST/HST. Tax adjustments deleted when a bill was deleted may not be reflected correctly
- GST/HST. Tax category fields not automatically enabled for Canadian firms.
- New File. While creating a new file and using number by client. If adding a new contact via additional contact section was done, then the file wouldn't save
- Vendors may not have shown up in the help list immediately
- Payables Reports. Security required receivables security.
- Transaction Levy. Only the last 50 entries were displayed; totals were correct.
- Operating In/Payables. Billing hold flag not saved.
- Drill down on NSF check entries no longer supported.
- Conflict Search. Searches with multiple spaces beside each other would cause an error
- Excel. Reports with dates in "header" section but dates not set yet would fail export.
- Trust Ledger View. Wasn't honoring the start date so opening balances incorrect.
- Time Entry. Rounding precision increased
- Spelling mistakes on licenses exceeded screen.

Release 1.2.79 (5593) – Apr 29
Fixed:
- Invoicing. Contacts no longer being invoiced, but had previous invoices would get a $0 invoice.

Release 1.2.78 (5593) – Apr 26
Enhancement/Change:
- Operating Out/New Payable. User override now required if Hard Cost PR is used without a file.
- File Lookup. Firms using client matter numbering can now search by the matter portion.
- Invoicing. Fee section where only total of fees required now supported (turn off all fields and specify the text in the title field).
- Invoicing. Add token for text fields: Client Email.

Fixed:
- Data Entry. Entries requiring both admin and user level overrides may fail
- Invoicing. In SQL farm environment. A single combined operation of undo request/create new request could read data from secondary server before the undo was fully replicated leading to incorrect previous balance.

Release 1.2.77 (5586) – Apr 25 (not released)
Enhancement/Change:
- Operating Out/New Payable. User override now required if Hard Cost PR is used without a file.
- File Lookup. Firms using client matter numbering can now search by the matter portion.
- Ledger View. Logic added to not load all entries if only balance records required.
- Reset Casefile Balances. No longer requires IIS server to be restarted.
- Ledger View. New alternative WIP Matter Summary layout shipped; have to create own view.
- Ledger View. Asterisk ('*') now placed beside expenses not using file's default tax category.
- Packages. Angular, UI-Grid, Kendo, Office, and more.
- Invoicing. Trust only statements now supported -no page breaks and no fees, expenses, totals.
- Invoicing. Security loosened to allow non-admins to access signatures for invoicing purposes.
- Startup. New optimizations to allow casefile/contact information to be preloaded more efficiently.

Fixed:
- Ledger View. WIP Matter Summary may not have run depending on conditions
- Zero Invoices. Commit stage now scrolls properly when large amount of entries
- Ledger View. Filter by include/exclude didn't work when using balance records.
- Trust to Operating. Files with multiple billing splits wouldn't allow contact to be specified
- Invoicing. Changing client or changing a contacts allocation to 0.00 percent while having a previous balance would cause finalize to fail
- Request Check. Removing an allocation or changing tax to non-taxable would cause exception.
- Data Entry. Leakage from previous entry could occur so screen would start partially populated.
- New File. IE 9 could produce incorrect "file saving error" when new file was successfully created.

Release 1.2.75/76 (5544) – Apr 17
Enhancement/Change:
- Zero out Invoices for Contact with zero total balance utility released.
- Balance records. Optimization to not write out no change records
- No longer saving backups of snapshot data to improve performance

Fixed:
- Invoices. Discount only invoices may produce math error
- Casefile Balances. Under certain conditions, entries could be processed multiple times.

Release 1.2.74 (5536) – Apr 16
Enhancement/Change:
- General. Many options will load quicker due to better data cleanup in a number of scenarios.
- Expense/Time Import. Large imports optimized to process much quicker.
- Zero Invoices for Contact utility added. Invoices for a contact (not client or case) that net to zero have a receipt created (also for zero) that will pay all the invoices (requires negative invoices).

Fixed:
- Contact descriptions may not show on some screens (regression)
- Approve Invoice. Changing the trust transfer amount to zero now works.

Release 1.2.73 (5524) – Apr 14
Enhancement/Change:
- General. Added preload of recent casefiles and contacts. Will add a couple of seconds to log in.

Fixed:
- Approve/Release Invoices (regression). Missing address/name information with latest optimizations.
- Invoicing (regression). Trust Transfers during billing stopped working with latest validation checks.

Release 1.2.72 (5518) – Apr 13 (never released)
Enhancement/Change:
- Invoice Views. Receivable, Payment, Adjustment, and Statements now can be filtered by group filters: File, Billing, Tax, Interest, Rate, and File Tag.
- Time Entries. Optimized for large number of entries being imported at once.
- Dates. Added ability to enter dates in numeric format without spaces; may need zeros.
- Layouts. Added confirmation prompt when deleting a report layout.

Fixed:
- Receipts/Invoicing. Receipts that could impact invoices that are in the approval stage are now blocked.

1.2.71 (5508) – Apr 11 (never released)
Enhancement/Change:
- Invoice Approval. Last Fee Earner remembered between sessions
- Performance. Caching engines added for balances, casefiles, contacts, and settings. Cache data now efficiently shared between components. Most of the program integrated to use. This should improve performance throughout the program
- Invoices. All requests, approve, finalize, and cancel operations are now serialized for a firm to help prevent the same invoice from being processed in multiple requests.
- Form 9a/9c. Firm name font reduced to better handle firms with longer names.
- Admin Static Lists. Focus should now be set to the first element on the screens.
- Invoicing. Creating PDFs. If error encountered, an error page is now inserted with details. Previously, processing stopped and error message displayed.

Fixed:
- File Manager. Additional contacts not showing contact's name
- Casefile Balances. changes made from approval screen on invoices still not finalized considered billed (should be unbilled).
- Ledes. Potential rounding issue addressed.
- Batch Check/Release Check. Various minor screen issues.
- Initialization. Better handling of fiscal end of year date.
- Report Layouts. Duplicate template names fixed to be unique.

Release 1.2.70 (5470) – Apr 5
Enhancement/Change:
- Deposit Slip. Now shows file and client information.

Fixed:
- Performance issue recalculating casefile balances
- Electronic invoices not showing notification
- Money Exchange Method on deposit screen display issue
- First time printing of a check for an account would produce an error
- Bank Reconciliation. Now supports non-number reference fields

Release 1.2.69 (5466) – Apr 4
no changes

Release 1.2.68 (5461) – Apr 3
Enhancement/Change:
- PDF engine package update from provider
- UI tweaks with grids: row height increased, focus and grid row colors changes for better contrast, and disabled cells background and text changed for better contrast.
- Invoicing. Added protection against multiple requests against the same casefile issues.

Fixed:
- Tax adjustments not factored correctly into casefile balances
- After conversions, new contact screen may not be accessible (data dependent)
- Time entries could be saved with properly rounding of the hours

Release 1.2.67 (5448) – Apr 2
Enhancement/Change:
- Balancing Engine. Optimized and extra checks to prevent summary number from going out of sync from backing data. Should be faster and safer.
- Time/Expense. Casefile balances preloaded to speed up validation.
- Grids. Highlighted rows made darker. Selected cell changed to blue
- Reports. Highlighted rows made darker for screen.

Fixed:
- Transfer checks on reports had "form available" but when clicked wouldn't open the check.
- Names on checks and receipts were accidentally changed to "Last, First" when contact specified.

Release 1.2.66 (5437) – Mar 29
Fixed:
- Time Sheet (regression). Can't save entries.
- Transfer Screen (regression). Save buttons may not show up in some situations.
- Billing (regression). Some invoices may not finalize due to trust validation check error.

Release 1.2.65 (5433) – Mar 28
Fixed:
- Financial Statements. Profit and Loss with top level only was not including the current run period in the YTD totals
- General. negative amounts will always use the locale's number format now so that front end AngularJS and backend Windows will use the same format.
- Data Entry. Extra checks implemented to ensure Save couldn't be hit twice leading to duplicate entries.
- Financial Statements. Filtering on a top level posting reference may not show entries of the sub accounts.

Release 1.2.64 (5427) – Mar 27
Enhancement/Change:
- Accounts Payable. New Payable View to show breakdown of File and Firm portions
- Release Check. Additional validations added
- Invoices. CC Contacts. The billing address, if present, will be used for name display
- Time/Expense. Deleted entries are no longer preserved. Backups now required for restore.
- Electronic Billing. 98/98Bi. Entry descriptions trimmed.
- Electronic Billing. Extra characters at the end of files now removed.
- Release Check/Batch Check. Added file and client information to screens.
- Conflict Check. Changed max hit limit from 200 to 1000 for administrators and 250 for others
- Casefile Balances now adds new entries to existing values rather than re-reading entire file.
- Static Lists. Name column now detects contents as either number, alpha, or mixed mode for sorting purposes.

Fixed:
- Logout could generate "insufficient permission" and the last snapshot may not be saved.

Release 1.2.63 (5414) – Mar 24
Enhancement/Change:
- Electronic Billing. Ledes 2.0 now supported
- Default width of dates in grids expanded
- Time/Expense. Added confirmation of row deletions
- Ledger View. New token for last operating receipt date
- Ledger View. WIP tokens/summary now show period values (was up to end date)

Fixed:
- Deleting the GL Opening Balance period would cause trust account balances to be removed.
- Bank Rec. Changing the end date of the first bank rec period (via bank feed often) no longer resets the bank rec; removing previous entries and cleared status.
- GST/HST. ITC amount may be incorrectly reported for entries in the current period and changed prior to the previous period being closed.
- Electronic Billing. Ledes 2000 may not correctly handle discounts made during the time of billing
- Invoicing. Automatic trust transfers on older invoices may be double counted on the current invoice (reflected in previous balance being incorrect) under some conditions
- Grid. Number fields may lose character if a second character not entered.

Release 1.2.62 (5398) – Mar 18
Enhancement/Change:
- Invoicing. Extra diagnostics for creating communication files
- Ledger Views. Working lawyer filter now applies to files working lawyer is also responsible for.
- Ledger Views. Filters: bill group, file group, interest group, rate group, tax group, and file tag.
- System Setting/GL EOY. Option to only zero out Income/Expense accounts; default includes Retained Earning accounts into equity.
- Expense Sheet. Totals added
- Receivable View. New definition provided: Client summary view. No invoice details shown. Responsible lawyer shown vs invoice collecting lawyer in client receivable view.
- Receivable View. New definition provided: Billing cost. Same as billing with hours dropped and costs split out into hard and soft costs.
- Receivable Views. Canada. Invoice number column width expanded.
- Invoices. Trust Statement. "Balance" changed to "Trust Balance"

Fixed:
- Invoicing. Editing charges could cause browser to freeze/restart
- Time. Negative time entries handled better
- Entries. Dates less than start up date could cause issues.
- Invoicing. Automatic entries could be created without required fields.
- Popup Lists with parent/children. Children no longer have bad characters shown.
- Statements. "Don't remind X days" ignored if collecting lawyer specified
- Statements. Profit and Loss. Year to date numbers not calculated correctly for current years if previous year not fully closed
- Statements. Changing the GL opening balances or chart of accounts will force reread of the data
- Grids. Should be better at not losing characters and possibly faster over extended usage
- Reset Balances no longer re-seeds the database – possible restoring deleted security groups.

Release 1.2.61 (5356) – Mar 6

Enhancement/Change:

- Ledger View. Filter for unbilled chargers over
- Ledger View. Filter for working fee earner
- Invoicing approval screen. Added Select/Deselect all buttons.
- Invoicing approval screen. Time/Soft costs can be deleted directly from the entry screen

Fixed:

- Invoicing. Mass invoicing could fail under certain conditions
- Invoicing. Extra checking for unlikely condition that a client gets processed without new invoices
- Invoicing. Mass pdf from approve/release screens did not apply sorting
- Invoicing. Manual trust transfers done to pay an invoice after it was created, followed by new invoice with receipts up date less than the date of the manual transfer caused balance forward math error.
- Invoicing. Better handling of communication (email/print) errors. No longer stops on first error and handle more scenarios gracefully.
- Ledger View. WIP detailed report (and some custom reports) may not show casefile details.

Release 1.2.60 (5344) – Mar 4

Enhancement/Change:

- Ledger View. WIP Matter Summary – added total unbilled
- Faster cleanup of old snapshot data
- Invoicing. Date frequency checks now use last invoices "entries up to" date; was released date.
- Invoicing. Eligibility list. More "excluded" items will now be available to be included in billing run

Fixed:

- Ledger View. Operating retainer balance may not calculate correctly under some scenarios
- Invoicing. Threading issue could lead to aborted mass billing with no message
- Invoicing. If no files matched the billing criteria the notification indicated error vs nothing to bill
- Bank Rec. Better handling of older entries incorrectly marked as being reconciled.

Release 1.2.59 (5337) – Mar 3
Enhancement/Change:
- Form 9A. New feature for Ontario clients
- Ledger View. New WIP Matter Summary definition shipped.
- Checks stubs now show "Che #" (was "Che")
- Invoice screens. Improved the speed that data is loaded/shown.

Fixed:
- Statements. Prior to closing any periods, the first day of the first period could be ignored
- Bank Rec. Better support to avoid rounding errors
- Invoices couldn't be moved from approve to release
- Invoices. list of files excluded from invoice due "No New Charges" did not include casefile Id.
- Invoice approval screen. Receipt Carried Forward entries dropped if charges changed.
- GST/HST. Refunds not handled correctly in total section
- Expense view. GL filter fixed
- Expense view. Include expense/Operating Bank filters changed to Soft/Hard costs to include AP.

Release 1.2.58 (5326) – Feb 25
Fixed:
- Temporary cached data may be removed while still useful

Release 1.2.57 (5324) – Feb 25
Enhancement/Change:
- Conflict Search. Binary data cache added to increase performance.
- Security. AP allocations will now appear on ledgers based upon expense security settings
- Excel exports. Page footer only reports (client summary view) now outputs all fields
- Ledger Views. Limited concurrent processing to 4 threads.

Fixed:
- Reset bank balances no longer resets the seed value; default security groups not restored.
- Invoice approval screen. During the first month expense changes produced incorrect warning.
- NetDocuments. Initial synchronization to EU/AU servers failed.
- Invoicing. Target Max value of zero was treated as ignore; reverted to create discount to zero.
- Invoicing. Lifetime maximums ignored if set at the casefile level
- Reporting. Block duplicate names from being saved; caused user to have to reload browser.

Release 1.2.56 (5310) – Feb 21
Enhancement/Change:
- AP. Added payable entry number token added to payment report

Fixed:
- Conflict Check. High CPU under searches with very short names (usually companies)

Release 1.2.55 (5308) – Feb 19
Enhancement/Change:
- Views: cleanup of old reports should be quicker.
- Views: screen engine tweaked to get larger reports to the front end more efficiently
- Views: pdf engine reworked to handle larger reports
- Ledger views now using secondary server for reading data
- Active threads increased from 50 to 100. More powerful servers can take advantage.
- Invoicing: new option to disable mass invoicing; force case file or contact to be entered
- Invoicing Optimized. Refactored to be more robust and integrated casefile balances to quickly dismiss casefiles with no activity. Testing varies, but mass requesting of invoices may be 75% quicker.
- Invoicing: billing arrangement target fees. If min set and maximum is less than min and actual exceeds min, then discount to maximum is created. Now max is assumed to be min.
- File Manager. Changing the primary contact with receipts/invoices assigned to the original client. Those entries are now automatically reassigned to the new client.

Fixed:
- Bank Rec processing of first bank rec that isn't also the system start-up date.
- AP grids could hide last line with scroll bar
- Bank Rec previous grids no longer loses focus while tabbing; removed filtering option.

Release 1.2.54 (5286) – Feb 15
Fixed:
- Bank rec grids broke from 1.2.50 changes.

Release 1.2.53 (5285) – Feb 13
Enhancement/Change:
- Ledger views should be much faster
- Ledger views can now filter by bank account
- Replaced diagnostic engine with low-fidelity version to improve performance
- Financial statements. Sort order of sub-accounts now always alphabetic
- Receivable reports will now show security message if entries removed
- Productivity report no longer limited to admins/power users.

Fixed:
- GL Static list export function now includes top level items
- User license logins may cause exception depending on how login occurs.
- Memory leaks in grids that may cause slowness
- Last row amount in data entry screens broke under recent changes
- Bank Rec: Entries after the system start date but before conversion date handled better.

Release 1.2.52 (5270) – Feb 11
Enhancement/Change:
- Replaced diagnostic engine with low-fidelity version to improve performance
- Ledger View – trust transfers now shows running balance and zeros balances will be shown

Release 1.2.51 (5267) – Feb 10
Enhancement/Change:
- Conflict Check – new Excel friendly view available
- Invoices – new Responsible lawyer token available for text fields
- Invoices – new Disbursement billing arrange: percentage of fees but always recalculates with fee changes. Current option only does at time of request.
- Invoices – date + description hides date if no description in expense sections
- Static Lists – you can now export lists to excel
- Grids – removed scroll bars that caused "jumpiness"
- Excel outputs strips/reformats HTML fields for better usablitiy
- Views - Alt + Excel will generate CSV file. If no page header, first line is not generated in csv file.

Fixed:
- Trust Ledger – dropped entries after ledger optimization
- Client name not appearing on some reports
- Invoices – if only date + description used hides date if no description was not working with fees
- GL Statements – if EOY assumed (not officially closed) and start date not the immediate date following the last day of the previous year (e.g. Jan 2 used) then the entries from the last day of the last year were double counted.

Release 1.2.50 (5247) – Feb 6
Fixed:
- Ebilling files with outstanding previous balance works again
- Lack of contact/casefile separator could cause infinite loops in some situations

Release 1.2.49 (5244) – Feb 6
Enhancement/Change:
- GL Statements will now show allocation explanation if available for banking entries
- Conflict checking. Implemented a few optimizations. Hopefully much quicker.

Fixed:
- Excel export with negative numbers in header field (GL opening balance)
- eBilling files could get included in a mass bill run even if there are no new charges
- Bank Rec Trust listing works again

Release 1.2.48 (5236) – Feb 3
Enhancement/Change:
- Ability to create PDF from of all attachments in a view. Use ALT + click PDF
- Security change: ledger views. Responsible lawyers can see everything on their files
- Statements. If one contact selected, statement should come up near instantaneously.
- Reset bank balances only option added

Fixed:
- System settings: checkbox for allow entries to be held
- Cloning not working under chrome
- NetDocuments synchronization under chrome
- After upgrade bank balances records not loading correctly

Release 1.2.47 (5227) – Feb 1
Enhancement/Change:
- Ledger views: new filter to not include non-billable time entries
- Ledger views: entries with no description but internal notes will show internal notes
- Matter directive increased to 15 characters. Views not touched.
- Additional ledger optimization applied for Any/All filters
- Ability to specify contact/file separator character(s)
- QB Memo token added (don't add "memo:" to front) for custom check layouts
- Moved recalculation of balances to maintenance thread – ledgers should start a little quicker.

Fixed:
- Fixed ledger optimizations that actually slowed things down for individual ledgers.
- Added 1099 table to reset tables.
- Bank rec now handles converted entries between start date and conversion date properly

Release 1.2.46 (5213) – Jan 30
Enhancement/Change:
- Old casefile balance entries deleted (performance)
- Additional ledger optimization applied for Any/All filters

Fixed:
- Bank Balances on entry screens not showing
- Ability to open files broke

Release 1.2.45 (5206) – Jan 29
Enhancement/Change:
- Ability to import closed files
- More reports standardized for easier customization
- Added ability for user to force license update

Fixed:
- Under chrome, ability to enable/disable shared license mode
- File opening balance screen. Made expense labels clearer

Release 1.2.44 (5199) – Jan 28
Enhancement/Change:
- Added automatic discounts/markup to billing arrangements
- Invoices – prevent user from using a "receipts up to" date after the invoice date
- Optimization/caching of case file balance information
- More layouts normalized to allow for better customization
- Statements – if contact selected with no outstanding invoices it will now show invoices anyway
- Statements – new option to ignore files that have an invoice in the request invoice stage
- Statements – aging title now added
- Statements – ability to add text after totals area
- Time View – new view with summary information only. Good for very long reports.
- Time View – entries with no description, but internal notes will show the internal notes.
- Invoices – if only description and date enabled and empty description, date will not be shown
- Invoices – client addresses now use 4 line standard. Address line 2 will not be joined with line 1.
- Invoices – electronic invoice files no longer participate in the "reuse same invoice for contact"
- Invoices – ignore trust will now hide entire trust section and related fields in totals
- AP – memo field character limit increased to 1000 characters
- Ledger Views – HIGHLY optimized. Most views run in ¼ of the time with some in 1/20th
- Ledger Views – ability to filter on AR, Trust, WIP, and Retainers
- Ledger Views – ability to show firm totals only
- Ledger Views – new summary view. Now have ALL files and only those with balances.
- Contact View – changed title of Fee Earner to Responsible for clarity
- Changed copyright to 2019
- Now shows server name on status line to add support
- Payment/Adjustment reports – collecting lawyer didn't get implemented correctly
- Payment/Adjustment reports – data leakage to unauthorized lawyers in some scenarios

Fixed:
- Invoices – trust receipts changed to use receipts up to date; was entries up to date
- Bank feed handled differently if date range extends beyond bank rec date range
- Crash during invoicing if client set to email but no email address specified; will now print
- General Journal – deleting last line would not automatically create a new line
- Data import – trust account balances may not have been calculated correctly
- Checks/1099 – printer offsets works better
- Invoice some printing/emailing with CC contacts could cause exception
- Conflict check. Searching with an apostrophe would cause search issues

Release 1.2.43 (5150) – Jan 17

Enhancement/Change:

- Conflict Check security is now supported.
- Conflict check restricted to 200 hits per name
- Removed the 100 character limit on activity code and task code descriptions
- Added ability to place contact number on checks (custom only)
- Invoice views now support "Group Case Files By Responsible Lawyer". Also forces page break between the lawyers.
- Invoice "By Client" views not group by responsible lawyer by default
- Ability to use the same invoice number for all case files belonging to a client during finalizing (firm setting)
- Ability to have conditional blocks of text in Invoice and Invoice Covers. <DRAFT>…</DRAFT> and <FINAL>…</FINAL> can be used to control when the contents are shown.
- Conversions can now support bill frequency, is task-based billing, auto transfer trust, billing addresses, and CC Addresses for billing
- Added the requested by user to the batch check and release check screens
- Removed restriction preventing bank entries for 0.00. A warning is now provided.
- Statements now supports insertion of text/space between the contact and summary section

Fixed:

- Data template fields now honor the length specified in the template
- Data templates can now be deleted
- Receivable view may did not always honor "Balance As Of" setting.
- Conflict search considered all notes for a file as one entity leading to false positives

Release 1.2.42 (5124) – Jan 14

Fixed:

- Case files without invoice split records would cause infinite loop (conversion data usually)

Release 1.2.41 (5121) – Jan 12

Enhancement/Change:

- 1099 form printing now available
- Internal caching of static tables during invoicing – minor performance improvement

Fixed:

- Payables may require user authorization when not required
- File Manager may show split billing contact percentages with 0% incorrectly (cosmetic)
- Massive split billing scenarios could lead to rounding issues that prevent finalizing the invoice

Release 1.2.40 (5110) – Jan 9

Enhancement/Change:

- 1099 Forms. Data conversion in preparation of 1099 form release
- Office365 internal changes to use Microsoft's beta api; nothing surfaced yet.
- Optimized loading of system settings at log on time.

Fixed:

- Canadian QuickBooks date format changed to CPA format

Release 1.2.39 (5097) – Jan 4
Enhancement/Change:
- Accounts Payable on Cash/Modified Cash system now allow back dating of firm payables into closed periods. If case files are referenced, you cannot back date as they need to affect the GL.
- During the first month you can now back date entries prior to the system start-up date.

Release 1.2.38 (5094) – Jan 3, 2019
Fixed:
- Conflict Search can crash when only entries found are deleted (no active records).

Release 1.2.37 (5089) – Dec 31
Enhancement/Change:
- Operating Retainers / Refunds on Invoices will only process entries from the default operating account set in system settings. Entries from other accounts will be ignored.

Fixed:
- Receipts Carried Forward entries were not processed correct on ledger view summaries if they have not been applied.

Release 1.2.36 (5087) – Dec 30

Note: that if you used Operating Out to Trust transfer entries you may need to verify that your hard costs, soft costs and retainer accounts still reconcile. If you closed a month a General Journal entry may be required to correct. Contact support for assistance.

Enhancement/Change:
- Ledes 2000 now supported
- More diagnostic information returned when invoices fail during finalize
- Reduced transaction restrictions. Should improve performance.
- File to File transfers now show both file numbers in description
- Expense views: entries created via Operating Out no longer show Posting Reference as it isn't used anywhere.
- Expense views: posting reference summary no longer includes operating out references and reworked to show soft costs better
- Expense views: posting references on entries no longer wraps to new line; now truncates

Fixed:
- Operating Retainer Transfers didn't post correctly to Financial statements. Was showing in hard cost account when they should have affected retainer account.
- File to File transfers could not be deleted
- Expense views incorrectly showed operating retainers to trust transfers

Release 1.2.35 (5060) – Dec 20
Enhancement/Change:
- Allow -ve payments and adjustments against -ve invoices. Needed largely for converted data.

Fixed:
- Minor office sign-in issues when on cloud.soluno.legal site.

Release 1.2.34 (5056) – Dec 19
Enhancement/Change:
- Microsoft/Office ability to sign in and view very basic information. Photo is used for profile. More to come!
- 1099 Information added to Contact Manager. Firms can start entering data prior to forms printing. Printing will be coming shortly.

Fixed:
- Refund only invoices causes financials to crash

Release 1.2.33 (5043) – Dec 16
Enhancement/Change:
- **New View: Statement Summary**. Only shows contact totals and doesn't page.
- Changing the file on a time entry no longer automatically updates the fee earner and rate.
- Added the file number to descriptions of auto-generated general journal entries
- Changed wording in Bill Display to better distinguish retainer payments from invoice payments
- Packages updated: angular and ui-grid
- More settings retained during various reset selections
- Invoice text fields: new token - attention for only companies; nothing displayed for individuals
- Ability to suppress page breaks between sections by using section separator.

Fixed:
- Transfer: Operating Retainer to Trust could not be deleted
- Time Sheet could be accidentally reset under certain conditions.
- Post-conversion adjustments could cause General Journal entry to be created
- Adjust invoice. Save button could be disabled under certain conditions
- Deleting the last blank row on time sheet or expense sheet would prevent creation of new rows
- Reminder statements would crash if two invoices for the same contact were the same.
- File to file transfers ignored on invoices if amounts changed during approve phase

Release 1.2.32 (5013) – Dec 10
Enhancement/Change:
- **CHG: deleting an invoice no longer deletes transfers done at time of billing. There is no way to know if the money actually moved at the bank. Use transfer journal to remove transfer manually.**
- Deleted layouts are no longer removed from system; just hidden.
- 4-line addresses are now formatted with zip on same line as city and state

Fixed:
- Vendors may not show up in help lists.
- Bank Journal may not work if start date not the first of the month
- Referrals by client now shown on various views.

Release 1.2.31 (4995) – Dec 4
Enhancement/Change:
- Bank Reconciliation performance improvements.
- QB 3-part checks – increased width of payee field

Fixed:
- Billed Receivable and Daily Time Summaries not fit the page with custom layouts
- Numbers in grids now sorted as numbers; was strings
- Orphaned transfers from previous billings no longer affect current invoices.
- Contact Cover now correctly includes discount amounts
- Payment/Adjustment views now supports invoice and casefile filters
- Invoice data could be sent via API to users without access; was not surfaced on screen

Release 1.2.30 (4981) – Dec 3
Enhancement/Change:
- Bank Account Security. Screen now reflects View access required to print checks
- Contact Us. Correct phone numbers now displayed

Fixed:
- Money In - List of client invoices for client is now fast
- Productivity Views – Fixed entries being over filtered
- Adjustment View – Start date not being honored
- Receivable based views now sort by client correctly (companies ignored)
- Payment and Adjustment Selections should now fit on page
- Bank Reconciliation should now load quicker on first bank rec and not block other users from performing other operations
- iPhone will now display Contact Summary attachments correctly.

Release 1.2.29 (4967) – Nov 28
Enhancement/Change:

- **New Productivity report**s: Time Entered and Time Entry Summary
- **Past Due/Statement views:** view/print overdue activity in customer friendly format. Note that email and communications not yet supported.
- **UTBMS codes for Intellectual Property added.**
- Conflict check now shows NetDocuments Document Id if provided.
- User preference to include/exclude automatic activity code text to flow into description fields
- Change more changes to index to improve performance
- Correspondence field now available for contact views
- Receivable reports optimized when showing case file information
- Excel export now supports views with no entries nor section footers
- Data Templates in Contact and Case File menus now sorted by Field name; use description for labels presented.
- Various package updates.

Fixed:

- Payment and Adjustment views may not show entries if associated invoice is older than 180 days prior to start date
- Screen views now support outputs with physical page breaks via dark line with space above and below.
- Excel fields surrounded with html formatting (for screen view) now outputs embedded value.
- Productivity views, entered time values used the id of the user who entered the time; now the id of the user entered on the screen.
- NSF entries on Bank Rec or Deposit Slip caused an error.

Release 1.2.28 (4922) – Nov 13
Enhancement/Change:

- **New Productivity report**s: Time Productivity, Invoice Summary, and Time Summary

Fixed:

- Financials. Cash. Retainers fully paying invoice with multiple lawyers posted incorrectly.
- Receivable based views. Client sorting now case insensitive.
- Trust Out. Dropdown now includes vendors again.
- Excel from views with headers only (List of contacts/vendors) did not export headers

Release 1.2.27 (4911) – Nov 12
Enhancement/Change:

- **New Productivity report (Beta)**. Find under Receivable views.
- Invoice Summary: new tokens Billing Lawyer, Billing Frequency, Area of Law, File Notes, File Rate Group, Client Notes
- Live Chat added. Under investigation: causes "only secure data to be shown" message and not appear.
- Invoice Trust Summary. Receipt total now includes opening balance
- Invoice Trust Summary. Opening balance no longer appears if zero.
- NetDocuments. Changed scope of search words from "all words exist and can be anywhere in document" to "all words need to be within 8 words of each other"
- Accounts Payable reports now filter to vendors only in the contact selection field

Fixed:

- Trust transfers at time of billing may not reallocate to correct general ledger accounts
- Prior payments and adjustments from conversions showing on current invoice
- Contact cover. Custom title labels for trust and balances were swapped
- Cancelling an invoice from release stage didn't work
- NetDocuments initial synchronization could remove electronic billing and CC information from file.
- Deleting a user would cause initials not to be shown on reports
- Invoice Payments with multiple allocations are now shown as one payment
- Invoice Trust transfers may show payment for invoice #: - draft- for final invoicing depending on database.

Release 1.2.26 (4887) – Nov 4
Enhancement/Change:
- Contact Views: Referral tokens and Summaries added for contacts and case files

Fixed:
- Database migrations on large data sets timed out

Release 1.2.25 (4883) – Nov 2
Enhancement/Change:
- Number of databases indexes added to improve performance in many areas
- Added token for invoice text fields: _HAS_TRUST_ and _HAS_TRUST__TITLE_
- Auto complete boxes changes to use exact match; was "or" match leading to too many hits

Fixed:
- 3-way split billing could lead to fee math errors (off by penny)
- Expense billing arrangements based upon fees now uses new fee charges only
- Trust money out contact box was showing vendors only – changed to both contacts and vendors

Release 1.2.24 (4873) – Oct 31
Enhancement/Change:
- NetDocs shows deeper analysis if failed synchronization

Fixed:
- Invoices with trust transfers may fail

Release 1.2.23 (4867) – Oct 31 (not released)
Enhancement/Change:
- Invoice trust summary now shows opening balance when only showing current entries

Fixed:
- Invoice with automatic expense charges may fail

Release 1.2.22 (4862) – Oct 30
Enhancement/Change:
- Implemented default explanation from task code
- Optimized invoice generation when using larger databases
- Optimized ledger view when using larger databases
- Optimized conflict search when using larger databases
- Optimized re-calculate checksums with larger databases
- Update various packages: pdf, html agility pack, twilo, angular, kendo, rest sharp, core packages

Fixed:
- Timesheet could lose fee earner and task code when switching tabs
- Time security could prevent rate and amount fields from showing under certain conditions.

Release 1.2.21 (4831) – Oct 18
Fixed:

- Contact search server error corrected
- Add extra space between save and reset on Expense and Timesheet
- Typo in Upload Settings File screen fixed

Release 1.2.20 (4824) – Oct 16
Fixed:

- Contact/casefile searches handle contacts without address

Release 1.2.19 (4824) – Oct 16
Fixed:

- Typo in fee adjustment popup
- NetDocuments sync without contact container may fail.

Release 1.2.18 (4821) – Oct 15
Fixed:

- Removed warning about the entries being on a request invoice when edited from the approve invoice screen.
- Audit Trail may fail if deleted transfer entry encountered.
- Deleting a check may throw off the balances shown in the money in/out screens.
- Invoices where expenses are calculated as a percentage of fees may encounter rounding issues preventing the invoice pdf to render or finalize.

Release 1.2.17 (4816) – Oct 14
Enhancement/Change:

- Text Field Processing engine now supports coding extended tokens.
- Bill Display uses extended text processing to support "_DATE_LONG_ENTRIESUPTO_ and "_DATE_SHORT_ENTRIESUPTO_" tokens.

Release 1.2.16 (4815) – Oct 12
Enhancement/Change:

- Performance enhancement – caching engine implemented for cases and contacts.
- Data conversions performance enhancements
- Ability to upload custom check formats
- New branding logo

Fixed:

- Child posting references not imported during startup
- Wip summary titles reversed for working and responsible fee earners
- New in Grid updates correctly with memo when payee is a vendor

Release 1.2.15 (4797) – Oct 8
Enhancement/Change:
- Billing templates – conditional title tokens in text areas now supported
- Batch Payables – can sort grids
- Receivable Payment View – now supports introducing lawyer options
- Receivable Payment View – now supports summary by referral summary
- Receivable Adjustment View – now supports introducing lawyer options
- Receivable Adjustment View – now supports summary by referral summary
- Conversions – import of contacts/casefile optimizations.
- Optimized GL loading/saving
- Optimized Rates loading/saving

Fixed:
- Ledger View specifying a contact and the contact has no files error
- Could not enable support user added to firms
- Payable reports now use reference consistently; was invoice in some areas.
- Editing a rate group that had a parent would go into infinite loop
- Invoices where firms use current date for release. Entries edited after request would get release date.

Release 1.2.14 (4774) – Sep 30
Enhancement/Change:
- NEW VIEW: Payable Cash Flow Report added
- RECEIVABLE VIEW: New option, "Fee Split Method", to render views based upon GL (current), Introducing percentages as set in the case file, or Introducing percentages as at the time the invoice was created.
- RECEIVABLE VIEW: Summary sections by Referred By available.
  Groups by the first setting found. Search order:
    1. case file referred by: user/introducing
    2. case file referred by: source
    3. case file referred by: contact
    4. contact referred by: user/introducing
    5. contact referred by: source
    6. contact referred by: contact
- SUPPORT ACCOUNTS: New user accounts are automatically created (disabled) to allow for Devlos support a way to access system without interfering with other users' activity. These users are non-billable – usage screens updated to reflect
- Enabled secondary database server for all accounts
- Data Conversions: allow for closed contacts
- Package updates: twilio, restshapr, and htmlagilitypack
- Operating In/Out will only display if there are outstanding invoices automatically (or "i" button)
- Time Security. Group with full access over another group honors top level "hide" field status
- Trust In/Out menus disappear if no file access (as all trust entries requires a file)
- On Hold Warning: New system setting to set warning level: admin or user
- On Hold file no longer applies to invoicing
- Hold status token added to Contact view
- Invoice Contact Cover: custom templates now support contact and case file tokens
- Invoice Contact Cover: signature block now supported
- Errors encountered during billing will now be surfaced to user
-

Fixed:
- Serialized some web calls to avoid rare deadlock scenarios
- Bank Rec; add check and add receipts links working again
- Time Summary Sorting sorts by full name
- Refunds were giving erroneous warning message with regards to GL account used
- Drilldown to casefile and contact mangers restricted based upon access
- Contact and Ledger views did not honor security settings in all scenarios
- Some edit reports did not show layouts
- Finalized invoice would show -draft for trust transfers. Now shows invoice number
- Generated entries on invoices, dates may not show correctly
- Generated entries on invoices will show at the end of their respective sections based on date

Release 1.2.12 (4741) – Sep 25
Fixed:
- Error saving new payable for existing Vendor.

Release 1.2.11 (4739) – Sep 25
Enhancement/Change:
- Time Summaries changed fee earner initials to full name, added job title.
- Added Summary or Working lawyer on WIP Summary view.
- Conflict checking. Added case file data template fields to items checked.
- Operating out will automatically set contacts as vendors if not set. Refunds excluded.
- Contact and Casefile manger will always reload from server vs using browser cache.

Fixed:
- Operating and Trust edits may fail
- Bank rec drill down of transfers now goes to transfer screen
- Billing adjustment under cash/mod cash may produce error writing out receipt adjustments
- Payment allocation view, showed incorrect amount for collecting lawyer fees on entries; totals correct.
- Mass billing with a file configured for electronic billing caused receipts on subsequent bills to not include receipts correctly.

Release 1.2.10 (4722) – Sep 23
Enhancement/Change:
- Hover text changed to 1 sec (was 2).
- Add new contact icons changed on edit screen.
- Edit icon removed from new casefile, icons for new contact changed
- Contact and File security released and applied
- Clio csv file formats now supported; task code taken from file or "bw" if not in file.
- Entries on a deposit slip and/or bank rec can have non-accounting details edited
- User defined billing frequencies increased to 15. With support help, names can be customized
- Maintenance thread does significantly less work during business hours.
- Support for reading from secondary (failover) servers supported.
- Financial data read from secondary server if available
- Invoices are created from secondary server if available
- Conflict checks are performed against data on secondary server if available
- Receivable ref field expanded for billings report

Fixed:
- Time/Expense entries performed unnecessary checks if thresholds on files not enabled
- Operating/trust in said payee…changed back to received from
- When billing "As worked" with multiple fee earners and a g/l % set in the casefile would lead to working lawyers being assigned incorrect amounts.
- Conflict check reads data in read-only mode to increase performance

Release 1.2.9 (4688) – Sep 18
Enhancement/Change:
- Entries with "add contact" button will hide button if user doesn't have access to add contacts
- New Casefile will hide add contact buttons if user doesn't have access

Fixed:
- Client ledger views reported bad report due to security regression issue.

Release 1.2.8 (4688) – Sep 17
Enhancement/Change:
- Contact boxes now tailored to show just vendors, clients, vendors and contacts, all

Fixed:
- Trust transfers at time of billing no longer requires "allow general retainers" setting.
- Text inside edit boxes are vertically centered.

Release 1.2.7 (4679) – Sep 16 (not released)
DATA CONVERSION – Add new security group: ContactFile

Enhancement/Change:
- Basic security for Contacts and Files. File menus removed if user denied access.
- Import optimizations
- Time/Expense quick entry screens friendly view with small screens (phones)
- User time preference settings hidden if no access to time entry
- US only: vendor ledger report, ref and check fields increased in size.
- Ability to edit non-accounting information on entries in a closed period
- Security messages are displayed in a nicer manner.
- Security check optimizations for some entries.
- Receivable reports optimized for filters that have less than 50 invoices. (file, contact, daily)
- Entries for deleted bank accounts will be seen on ledgers for normal users. Everywhere for admin/power users.
- Package updates: Rosyln C# compiler, Twilio, Azure Storage
- Ability to have descriptions on invoices forced to lower case.
- Auto complete boxes limited to 20 entries unless no search criteria (F2). Performance.

Fixed:

- Printing checks from with Transfer, may not always produce physical check
- HST report was incorrectly showing correction entries under some situations.
- Removed ability to delete an entry that is on an invoice in the approval stage. Invoices produced incorrect client balance.
- US only: GL opening balance - Canadian GST opening balance screen could appear
- Balances of bank entries could be wrong if bank account changes or moved to another month
- Ability to undelete a bank account restored.
- Contacts with other contacts CCed and with multiple invoices released produced too many copies.
- Daily time summary. Adjustment total fixed.
- Converted rates may not populate correctly.
- Bank Rec: Trust Listing report showed incorrect balances. Did not prevent finalization.
- Bank Rec: receipts cleared status remembered
- Bank Rec: End date changed when bank fee end was less handled correctly.
- Bank Rec: Receipts vs Deposits rounding error leading to zero balance showing as non-zero
- Bank Rec: Reconciliation tab rounding issue.
- Non-accrual systems. Mix of Trust to General transfers done before invoice rendered and during billing creation would product incorrect operating in balance, leading to incorrect previous balance shown.
- Files with multiple previous invoices and a Trust to General transfer done for the last invoice could lead to and incorrect previous balance shown on the current invoice.

Release 1.2.6 (4617) – Sep 3
Enhancement/Change:
- Allow quick timer to show for expense entries if user has view or view ledger rights.

Fixed:
- Money In: wasn't checking for invoice security correctly.

Release 1.2.5 (4613) – Sep 1 (not released)
DATA CONVERSION – Add new security group: Receivables
Enhancement/Change:
- Invoice/Statement security added
- Ledes: ability to specify Client ID override (used by some companies)
- Code optimization for data imports
- Audit Trail restricted to administrators and power users

Fixed:
- Edge Browser: multi-line control, auto-expand not followed by another key saved code
- Grid: first character may not be recognized, help list wouldn't auto expand
- Invoices: page 1 extra text showed on all pages
- Package updates: PDF enginge, htmlagilitypack, .net core, twilio, requires
- Timers: clicking on icon now works; may lose ability to use space bar
- Edit Time: if only the fee earner changed, the entry would not save.

Release 1.2.4 (4595) – Aug 27
DATA CONVERSION – Add new security group: ExpenseEntry
Enhancement/Change:
- Expense Security added
- Code optimization for data imports

Fixed:
- Deposit Slip showing no entries in PDF.
- Time security – small tweaks/optimizations

Release 1.2.3 (4574) – Aug 24
Enhancement/Change:
- Batch Payable – add support for "Never Print" and specifying check number

Fixed:
- Better handling of contacts removed from the database
- Various Bank Rec fixes and changes resulting from testing

Release 1.2.2 (4564) – Aug 23 (not released)
Enhancement/Change:
- Time Security – Added ability to oversee other groups (management)

Release 1.2.1 (4560) – Aug 22 (not released)
Enhancement/Change:
- Time Security – Individual and Group security implemented.
- Bank Rec reworked
- Invoice approve/requests screen will now show invoices that couldn't be finalized without refreshing browser

Release 1.1.26 (4553) – Aug 20
DATA CONVERSION – Add new security group: TimeEntry

Enhancement/Change:
- Time Security – Back end support plus partial front end; users can be removed from entering time
- User settings – "Phone" changed to "Mobile Phone" for clarity
- Package updates: Twilio and .net compiler

Fixed:
- Vendor Ledger – Payment Amount on custom reports
- Balance Reset may cause improper sending of entry id
- Audit Trail – deleted bank entries will fail
- Audit Trail – missing entries will fail report
- Tax Report – not properly showing corrections to op out entries during first remittance.

Release 1.1.25 (4530) – Aug 11
Enhancement/Change:
- Electronic Billing: support for Ledes 98BI (International).
- Conversions stopped can be restarted without resetting data
- Package updates: twilio and htmlagilitypack

Fixed:
- Startup file process when using Azure shares

Release 1.1.24 (4522) – Aug 9

Enhancement/Change:

- New Vendor Ledger view added that has operating and trust accounts enabled by default
- Client Ledger. Internal notes field added
- If firm's country not specified or contacts country not specified, country no longer appears on checks
- During initialization, Eula will now open in new window.
- On invoices, client and firm address now uses 3-line format; used to be 4 line format.
- Eligibility billing loading optimized. Was so slow it could appear to be hung.
- Package updates: pdf engine, Twilio, and azure.
- 3-part (non-quicken) check formats tweaked to move stubs down .1 inch. Same with name/address fields on the check body.
- Soluno is now a registered trademark; TM changed to (R) throughout

Fixed:

- Vendor Ledger, operating and trust accounts – no payment amount shown
- Money out checks less than $1.00 but not 0.00 showed void. Now shows zero dollars and XX/100.
- Chrome. In File Manager and Contact Manger view tabs cut off bottom of edit boxes.
- Editing a payment with previous payments could cause allocations to be recalculated incorrectly.
- Deleting a payment under cash with adjustments applied could result in error
- File Opening Balance screen could show trust account to be invalid (failed security check).
- Contact Manager, 1099 flag was not being retrieved correctly.
- PDF engine tweaked so that pagination works better – could cause 1 line /per page previously
- File Manager extra staff couldn't be added as easily as intended.
- Invoice with primary contact being printed, but CC contacts being email crashed.
- Invoices to CCed contacts wasn't appearing in communication tab of contact
- Spelling of Australia fixed within NetDocuments integration
- Startup files during initialization would crash when using Azure shares.

Release 1.1.23 (4496) – Jul 28
Fixed:

- Bank Rec TL – bank account not filtered properly on report
- Tweaked expense/time sheet delay to avoid "not responding" message
- Add bank account – bank type not available.

Release 1.1.22 (4491) – Jul 27
Enhancement:

- Banking security. Fully implemented.

Change:

- All utility screens reworked to use new grid standard.
- Save/Cancel buttons disabled during imports/saves

Fixed:

- Receivable Payment Views did not process start date correctly.
- Expense Sheet database errors. Major rework.
- Couldn't switch bank accounts for entry prior to first bank rec of original bank account.
- Transaction levy checkbox under chrome didn't work correctly.
- Operating Money In was not populating client when an invoice was specified

Release 1.1.21 (4474) – Jul 24
Fixed:

- Leeds didn't generate due to package update conflicts.
- NetDocs – some new file opens failed when not using contact workspaces

Release 1.1.20 (4469) – Jul 23
Fixed:

- Eligibility list may not auto load after request
- Rare condition that server and client may be sending notifications at the same time
- Drill to operating check without view rights would product blank screen

Release 1.1.19 (4464) – Jul 23 (never released)
Enhancement:

- Banking security. Implemented modify writes on entry screens

Fixed:

- Non-administrators may not be able to log in due to recent security

Release 1.1.18 (4460) – Jul 22 (never released)
Enhancement:
- Ability to enable/disable the creation of summary pages on invoices
- Finalize invoices option to use "today", as opposed, to the requested date
- AP: Warning added if the same reference number is used with the same vendor
- Multiple timers now supported in the time sheet; option to allow 1 or many to run.
- Ability to delete individual rows in time sheet
- Financial security implemented.
- Ability to configure banking security; not fully supported by all aspects of program yet.

Change:
- Internal support for banking security for view/modify.
- Time/Expense support forcing the date format to parse input files
- Ability to support Ghost Practice conversions.
- NetDocuments tab in file manager will show message for files not actively being synchronized.
- NetDocuments tab in contact manager hidden if contacts not being synchronized; only files
- Various third party package updates

Fixed:
- Bank directives in reports not listing bank accounts
- Error recovery for errors during initialization of a new account
- Changing amounts of trust transfer on a pending invoice could lead to "Database Error" message
- ITC adjustments were not being displayed correctly on the gst/hst report
- Expense sheet/transaction levy entries were not defaulting the amount correctly.
- NetDocuments integration wouldn't start unless full URL specified (main.cshtml).
- NetDocuments sync would fail with newline characters in description.
- NetDocuments sync would fail if not synchronizing contacts to a contact cabinet.

Release 1.1.17 (4427) – Jul 10

Change
- Added mime types for font files to IIS servers (some didn't include)
- Added recovery code for partially created data sets (error during creation)

Fixed:
- Payable security validation didn't work as intended
- Bank account security was preventing creation of a new data set

Release 1.1.16 (4423) – Jul 10 (never released)

Feature
- Ability to disable/enable "request money out" + "release money out" features. Disabled you get simplified screens.
- Security: Banking: support for creation and deletion of entries plus feature access. Modifying relies on create permissions for now. Viewing permissions pending.

Change
- Settings are flushed when Admin menu is exited. Prevents having to re-login to get settings recognized in many scenarios.
- Multiple 3rd party packages updates. Should address a few UI issues reported.
- Better Grid for line selection. Also switching to SVG icons on grid lines.

Fixed:
- Conversions: Trust balances weren't being pushed to G/L correctly
- Canada: GL Opening balances screen updating totals after entering GST/HST
- Canada: HST report didn't include payable entries.
- Billing + multiple transfer adjustments could cause the transferred amount to be incorrect

Release 1.1.15 (4397) – Jul 3

Change/feature
- Conversions: Added ability to set NetDocuments ignore sync flag
- NetDocs: Area of Practice now synchronized with the "type" field in NetDocs.

Change
- Added hook to force balances to recalculate. Used to force recalculation of casefile balances.
- Operating out now shows gl account for allocations involving casefiles.
- Security model on the client ready for menu removal operations.
- Updated packages related to notifications and azure

Fixed:
- Changed how grids handle blur events to better trap when to update snapshot data. Specifically, time/expense screens
- Rare situations where both client and server attempt to delete a notification at the same time.
- Handle bad data from April issue that caused invoices/entries to not bill correctly and/or caused pdfs to not generate
- JavaScript error when using the "i" button with casefiles.
- AP payment report generated a bad report when processing payments with a memo field
- AP Payable report filter by vendor

Release 1.1.14 (4377) – Jun 29
Change/feature
- Added tree view for bank accounts maintenance screen.
- Added ability to assign groups (users) to bank accounts for security
- Bank account security: first implementation – can restrict who sees bank balances (more to come).
- Bank Feed: better support for more bank feed formats.
- Bank Feed: now can see memo field
- Bank Feed: leading zeros removed when displayed on screen

Fixed:
- Trust Out: Tabbing through type field could reset check management selection under Canadian system.
- AP: first lookup of a payable may crash
- AP: error 405 may appear on operating out screen
- Ability to add new user logins beyond their license count; users don't require a license unless they actually log in.
- Ability to delete vendor arrangements
- Billing arrangements – disbursements as percentage of fees calculated incorrectly (forgot to divide by 100)
- Billing review – multiple edits to trust transfer amount could generate database error.
- Bank Rec – EFT cleared status may not be set correctly preventing bank rec from being closed.

Release 1.1.13 – n/a

Release 1.1.12 (4344) – Jun 21
Performance
- GL Statements would run from beginning of time if: no periods closed and did not run using the start up date as the report start date. Performance if converted system.

Change
- Money Out screens now reflect the address format as it will be displayed on a check.

Fixed:
- AP Checks falsely reporting use of control account
- Group and User screen formatting for group and user lists under chrome.
- Address 3 lines on checks when from Money Out screen.
- Canadian systems: Money Out screens could reset release/print now to release/print later after selecting method.

Release 1.1.11 (4334) – Jun 19

Change: New design for user screens in preparation for new security.
Change: Most popups will now have focus set
Change: control account warning messages have been scaled back.
Change: finalize invoice from create invoice screen will now prompt for pdfs to be opened/saved.
Change: 3 line addresses will now have Zip/postal code on same line as city and state. Country on 3rd line if international. Line 2 will be on own line for domestic.

Release 1.1.10 (4325) – Jun 14

Enhancement: added validation warning if a user references a g/l account that is highly unlikely to be correct. Multiple screens.
Enhancement: split billing changed to use decimal places for percentages. Calculates to 4. Client will see 2 for most currencies.

Change: On invoice slugs, retainer amount applied is now shown
Change: Checks. Payee Address width increased from 3" to 4" and long lines truncated (not wrapped).
Change: transaction levy multiple entries on a single file changed to user override (was informational)
Change: Audit trail report titled updated
Change: multiple grids handle blur/exit cell events more efficiently
Change: added message to show no payables outstanding instead of blank screen
Change: misprinted check popup screen reworked to be more intuitive. Some browsers also hid key information.

Fix: Vendor ledger report handle memo field properly
Fix: Receivables report. Added extra space for aging category
Fix: AP drill down from linked entry.
Fix: AP batch payable outstanding value
Fix: Split billing fee allocations would not post to correct accounts.

Release 1.1.9(4307) – Jun 11
Enhancement: ability to create groups and assign users. Not currently used. First step for upcoming security changes.

Change: g/l account will reset to blank if casefile removed for money out/ap.

Fix: Create set of new books failed with logging enabled
Fix: Transaction Levy value not saving correctly
Fix: Receipt Trust/OP can now be deleted when entered through case file opening balance
Fix: Cash. Receipts applied to invoices in a closed period with adjustments calculated properly
Fix: Batch printing. Incorrect address may have been used on checks.
Fix: Casefile staff were not being updated correctly

Release 1.1.8 (4288) – Jun 7

Fix: notification changes caused some screens not to load

Release 1.1.7 (4286) – Jun 6

Performance: Notifications engine reworked to auto-reconnect to server. Notifications may not have been shown under some circumstances.

Change: Review Invoice->Select charges. Updated grids to conform to new grid standard.

Fix: Ability to change trust entries on opening balance screen while first bankrec in progress.
Fix: Review Invoices->Select charges. Count and totals weren't always being updated.
Fix: Invalid message could appear for entries on a bank rec.
Fix: Client name, client/file trust balance, and AR balance not always updated in grids.
Fix: QuickBooks checks templates for Trust accounts not working in the U.S.
Fix: Changing case files on charges would not recalculate balances for the original file immediately.
Fix: Number of issues addressed when changing case files as it pertains to the entries appearing on invoices.

Release 1.1.5 – Jun 5. (changes since 1.1.3 (May 29)):
Enhancement: Ability to provide billing override during create invoice. Note that release/finalize will use the
Enhancement: Show both casefile description and entry description on receipt forms. For operating, invoice numbers are shown if not in description.
Enhancement: Client Roles now showing for conflict checking. Casefile roles displayed better.

Performance: Better caching of grid layouts
Performance: Increased locking timeout from 20 to 60 seconds. Reset still after 5 min. Should reduce error 500 messages.
Performance: Handle empty searches and invalid characters going to Casefile resulting in getting all files and JavaScript crash.

Change: Invoices now called Statement and attachments includes (where possible) casefile number and invoice
Change: Don't show message if report document not found. Likely only happens when deleting reports too quickly.
Change: Added more validations for casefile saving.
Change: Data Import - Added logging for start and end of conversion
Change: Cleanup of Groups/users and remove permissions being tied to groups.

Fix: Opening Balance Screen not always shown and formatting issues
Fix: Changing case file on time entry could cause saving error.
Fix: Number of small script issues in casefile new and ,contact new
Fix: Handle trust transfers followed by a new invoice. Transfer not included properly.
Fix: Negative payments not added properly if from operating to trust transfer.
Fix: "info" button on casefile with roles crash.
Fix: use the trust entry date (not that invoice date) on billing trust statement.
Fix: Ensure excel tab names are less than 30 characters and unique...prevent excel reporting corruption
Fix JavaScript error if reports terminates unexpectedly
Fix: Handle -ve retainer with +ve charges.
Fix: Test button not working in configure services.
Fix: Payable Linked Entry Validation Fixed
Fix: Expense sheet fix for not blocking ui when saving
Fix: Casefile balances to handle payable entries correctly
Fix: Timesheet + expense block ui removed upon saving to fix block ui getting in the way when validations...
Fix: Bugs saving roles and addresses with clients. IDs not sent so extra records created. And you could never delete roles.
Fix: save buttons not showing for email/sms configure services