App4Legal.v8.14 Release Notes

Important highlights from this release

- Connect your email to easily send, receive and track emails to and from clients, directly from your invoice, for a better collection process.
- Admins can now lock time entries made before a specific date – blocking the user's ability to edit time logs.
- Contra users are now able to manage their contract milestones, giving users better control over contract lifecycle and execution.
- Users are now able to add checklists on specific tasks, adding unlimited items to the checklist, and viewing percentage of completion.
- Configure and automate contract notifications when a contract is signed through DocuSign.
- In the settings, under practice area, users are now able to select multiple clients when setting due dates for any types of matters.
- Ability to preview related documents when working on a contract.
- Optimized UI/UX for Tasks & Triggers Automation to facilitate and streamline the automation of tasks.
- Configure Settings in multiple languages, with the ability to set your default languages and customize fields as default in a specific language.
- Automated Notifications have been added whenever specific actions are taken by a user in the Client Portal.
- When adding or editing an SLA, users can select multiple practice areas per SLA.
- Configure an SLA to be applied to multiple clients – that way the SLA is activated and matched to any matter related to the selected clients.
- Minor Bugs & Minor Improvements

Issue Type	Issue Key	Summary	Description	
New Feature	A4L-6827	Tasks - Add a checklist of tasks	Tasks in App4Legal can include checklists: ▪ Each Task can have 1 checklist ▪ An unlimited number of items can be added to a checklist ▪ A progress bar is displayed to show the percentage of completion	
New Feature	A4L-6514	Email Account Integration	App4Legal users will have the ability to connect their personal email accounts to log, send, and receive emails within the system. ▪ The interface will support Gmail and Office 365 ▪ When an invoice is created the user will be able to send the invoice to the client to start the process of collection. ▪ The contact email address (client email) will be fetched automatically to the email form with the invoice as an attached pdf file with a cover template of the email. ▪ At the level of each invoice, we will be able to keep track of the replies. (the communication will be logged in the system)	
Improvement	A4L-7962	Improve Trigger Form	Improve the trigger creation form.	
Improvement	A4L-7181	SLA - Multiselect on Clients	Enable SLA configuration to allow multi-select on Clients The user will have the ability to add multiple companies, groups and personal clients, or choose all clients per SLA. Previously, users were only able to choose 1 client per SLA. Once the SLA is activated, it is matched to any matter related to any of the selected clients.	
Improvement	A4L-8001	Multi Select options in Report Builder Advanced Search	When using the advanced search in the report builder module, a user can multi-select search criteria (Example: Practice Area, Assigned Team, Workflow Status)	
Improvement	A4L-8069	contract dropdowns are now sorted by alphabetical order.	All dropdown lists added to the system are now sorted by alphabetical order.	
Improvement	A4L-7180	SLA - Multiselect practice areas	Enable an SLA configuration to have multiple practice areas selected	
Improvement	A4L-7182	Practice Area - Due date - Client multi-select	A user will have the ability to add multiple companies/groups and clients or choose all clients per practice area under each condition for the specified type (company/group or person).	
Improvement	A4L-7765	User to be notified when an action happens from CP	An App4Legal user will be notified when a client from the CP performs these actions: • Add a comment in the contract • change status • approve/reject • negotiate • sign	
Improvement	A4L-7956	New Design for Pages in Settings		
Improvement	A4L-7999	Updated hearings grid	A column for "Postponed hearing date" was added to the hearings grid.	
Improvement	A4L-7927	Accounts receivable aging summary to appear in the billing currency.		

Improvement	A4L-8022	Ability to change the title of the receipt payment.		
Improvement	A4L-8052	Reminders type to be "Others" for contra	The default type of contra reminders is now under the category "Others".	
Improvement	A4L-7967	E-Invoicing Activation behavior	The E-invoice activation option will be applied when the entity currency is SAR.	
Improvement	A4L-7985	Add preview option to related docs in contracts		
Improvement	A4L-8011	Add SLA contract types to the default workflow	Add the option for the user to choose a contract type when default workflow is chosen.	
Improvement	A4L-7902	IP Registration number	The IP registration number will be fetched from the general info page	
Improvement	A4L-6990	Contract Templates	Improvements and enhancements on the contract template creation.	
Improvement	A4L-7881	Milestone payment schedule	Payment milestones are now enabled in contracts.	
Improvement	A4L-8050	Invoice Grid - Entity Currency Totals	When having an invoice with a different currency than the entity, the totals in the entity currency is calculated based on the exchange rate at the time the invoice was created and not based on the current exchange rate.	
Improvement	A4L-8033	Time logs - Lock Editing Time Log	Administrators can lock users' ability to edit time logs before a specified date.	
Improvement	A4L-8076	Client Portal - Export list of contract requests		
Bug	A4L-8018	Invoice an archived matter	Archived matters/Litigation cases will not be linked to invoices anymore.	
Bug	A4L-7296	When adding a note from the Advisor Portal, the user name is not showing.	When adding a note from the advisor portal, the name of the user will appear in the notes under the matter.	