

# 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: <ul style="list-style-type: none"><li>▪ Each Task can have 1 checklist</li><li>▪ An unlimited number of items can be added to a checklist</li><li>▪ A progress bar is displayed to show the percentage of completion</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                    |  |
| 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. <ul style="list-style-type: none"><li>▪ The interface will support Gmail and Office 365</li><li>▪ When an invoice is created the user will be able to send the invoice to the client to start the process of collection.</li><li>▪ 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.</li><li>▪ At the level of each invoice, we will be able to keep track of the replies. (the communication will be logged in the system)</li></ul> |  |
| Improve ment | A4L-7962  | Improve Trigger Form                                                 | Improve the trigger creation form.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |  |
| Improve ment | A4L-7181  | SLA - Multiselect on Clients                                         | Enable SLA configuration to allow multi-select on Clients<br>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.<br>Once the SLA is activated, it is matched to any matter related to any of the selected clients.                                                                                                                                                                                                                                                                                                                                            |  |
| Improve ment | 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)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |  |
| Improve ment | A4L-8069  | contract dropdowns are now sorted by alphabetical order.             | All dropdown lists added to the system are now sorted by alphabetical order.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |
| Improve ment | A4L-7180  | SLA - Multiselect practice areas                                     | Enable an SLA configuration to have multiple practice areas selected                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  |
| Improve ment | 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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |
| Improve ment | 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: <ul style="list-style-type: none"><li>• Add a comment in the contract</li><li>• change status</li><li>• approve/reject</li><li>• negotiate</li><li>• sign</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |
| Improve ment | A4L-7956  | New Design for Pages in Settings                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  |
| Improve ment | A4L-7999  | Updated hearings grid                                                | A column for "Postponed hearing date" was added to the hearings grid.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  |
| Improve ment | A4L-7927  | Accounts receivable aging summary to appear in the billing currency. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  |

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| Improve<br>ment | A4L-8022 | Ability to change the title of the receipt payment.                       |                                                                                                                                                                                                                              |  |
| Improve<br>ment | A4L-8052 | Reminders type to be "Others" for contra                                  | The default type of contra reminders is now under the category "Others".                                                                                                                                                     |  |
| Improve<br>ment | A4L-7967 | E-Invoicing Activation behavior                                           | The E-invoice activation option will be applied when the entity currency is SAR.                                                                                                                                             |  |
| Improve<br>ment | A4L-7985 | Add preview option to related docs in contracts                           |                                                                                                                                                                                                                              |  |
| Improve<br>ment | 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.                                                                                                                                       |  |
| Improve<br>ment | A4L-7902 | IP Registration number                                                    | The IP registration number will be fetched from the general info page                                                                                                                                                        |  |
| Improve<br>ment | A4L-6990 | Contract Templates                                                        | Improvements and enhancements on the contract template creation.                                                                                                                                                             |  |
| Improve<br>ment | A4L-7881 | Milestone payment schedule                                                | Payment milestones are now enabled in contracts.                                                                                                                                                                             |  |
| Improve<br>ment | 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. |  |
| Improve<br>ment | A4L-8033 | Time logs - Lock Editing Time Log                                         | Administrators can lock users' ability to edit time logs before a specified date.                                                                                                                                            |  |
| Improve<br>ment | 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.                                                                                                                  |  |