App4Legal v9.7.0.0 Release Notes

Important highlights from this release

- Advisor Portal interface enhancements allow users to easily customize the look and feel by modifying colors, logos, and fonts to their preferences.
- Client Portal users can now be restricted from editing, adding, or deleting attachments.
- The delegation feature now includes approvers and signees for contracts, available to both Contra and Client Portal users.
- Automatic email notifications will be now sent to the requester upon the creation of a request from the client portal.
- Introducing additional enhancements to the Lump Sum features, including Credit Note Prefix Customization.
- Users can now use their logos in system-generated Notification emails.
- Minor Bugs & Minor Improvements.

Issue Type	Issue Key	Summary	Description
New Feature	A4L-10389	Lump Sum additional features	The lump sum feature has been upgraded with some exciting additional capabilities, such as the customization of the Credit Note Prefix, making it easier to manage and organize your financial records, in addition to a filtering option for Invoice prefixes in the Money dashboard. This means you can now efficiently sort and view invoices based on their specific prefixes.
Improvement	A4L-10366	Customize Client Portal Home Page	A new customization options for your client portal home page: 1. Improved User Interface: When there are no requests displayed on the client portal home page or if the requests are hidden for any reason, the search box for requesting new items will be removed. 2. Customizable Welcome Message: a new field in the Client Portal setup and configuration is added, allowing you to customize the message displayed on the home page, just below the welcome message.
Improvement	A4L-10330	Add default client to the system	A new default value option for "matter client" is added under "default values." When this default value is set, it will automatically insert the client name when a new matter is created.
Improvement	A4L-10299	New columns in the Time Entries per Month Report	We have added two new columns to the Time Entries per Month report, which include both the invoiced and collected hours.
Improvement	A4L-10280	Success message when deleting a reminder	When deleting a reminder, you will receive two messages: a confirmation message asking for your confirmation to proceed with the deletion, followed by a success message after the deletion is completed.
Improvement	A4L-10247	New column in the Task roll session report	A new column has been added to the Task Roll Session Report, that displays the last comment on each task. The comment is shown in a limited number of characters, however, when users hover their mouse over the text, the full comment will be displayed. The full content of the comments will be also shown when the report is exported.
Improvement	A4L-10127	Advisor Portal Look and Feel	Enhancements on Advisor portal interface, users can now customize the Advisor portal look and feel easily, they can now modify colors, logos, and fonts according to their preferences.
Improvement	A4L-10107	Allow Client Portal users to add contacts through their requests for contracts from a templates	The "Allow Clients to Add Contacts through Requests" is now also enabled for requests made from the client portal using a template.
Improvement	A4L-10099	Edit Milestones from the Client Portal	Now, CP users will have the ability to edit milestones from their end, providing greater control over their project progress. Administrators can decide from the Client Portal Configuration settings, whether to allow CP users with Collaborator licenses only or both Collaborator and Client licenses to edit milestones.
Improvement	A4L-10049	Add a new SLA directly from the matter page	In the Matter page's SLA window, when there is no SLA running on the matter, we have added a helpful link to the SLA Setup page in the settings. This link allows users to easily add SLAs by opening the configuration in another tab.
Improvement	A4L-9997	Add Modified On and By to the litigation and corporate matters grid.	The "Modified On" date and "Modified By" fields are now added to the litigation cases and corporate matters grid fields.
Improvement	A4L-9994	Prevent editing or adding attachments from the Client Portal.	You can now apply some restrictions on Client Portal, preventing them from editing, adding, or deleting any attachments. However, they will still have the ability to view the existing attachments in read-only mode. You can customize this behavior from the settings, and choose whether to allow CP users to edit attachments or restrict them to view-only access.
Improvement	A4L-9962	Export user rate per hour	Users can now export to Excel or PDF the User Rate Per Hour Report.

Improvement	A4L-9957	Delegation for contract approvers and signees	The delegation feature is now enhanced by including approvers and signees for contracts. When an approver or signee is out of the office, another user will be able to step in and handle the approval or signing process on their behalf. This delegation functionality will be applicable not only to core users but also to Collaborators (Client Portal users). Note that CP users should have a collaborator access type to be able to use the out-of-office feature, and the alternative CP user must belong to the same company to maintain smooth workflow and collaboration.
Improvement	A4L-9795	Add "Link" type in Custom fields	A new link type for custom fields, enabling users to add external links, including attachments, to their preferences. This feature extends to the client portal requests form as well, allowing users to utilize external links and attachments when submitting their requests.
Improvement	A4L-9507	Show custom fields in the persons and companies grid	Users can now select custom fields to be visible from the Persons and Companies grid.
Improvement	A4L-9506	Replace App4Legal Logo in Email with Customized Logo	Users can now use their logos in the Notifications emails sent by the system.
Improvement	A4L-8017	Email notification to the client	Upon the creation of a request in the client portal, whether it's a matter or a contract, an automatic email notification will be sent to the requester. The email will contain all the pertinent details of their request, including the matter /contract name, assigned person, relevant dates, and other essential information.
Bug	A4L-10216	Saving and creating another Task is not related by default to matter/contract	
Bug	A4L-10145	All kendo Grids are not loading data on the first time	
Bug	A4L-10136	Inaccurate data in reports related to invoicing	
Bug	A4L-10031	Custom Field "Upload Document" error handling	
Bug	A4L-9910	All language values are mandatory in settings	
Bug	A4L-9843	Long text is not displayed in grids	
Bug	A4L-9419	Intellectual property redirecting to the dashboard	
Bug	A4L-9340	Time Entry Validation and Regression	
Bug	A4L-9291	Missing actions in the permission scheme	