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# Case Manager V6.4 - Release Notes

## New Features

Please visit our Learning site for more detailed information on new features and improvements to Case Manager at https://learning.casemanager.biz/web/WhatsNew/WhatsNew6-4.htm

**Summary of enhancements added to the 6.4.0 Release**

- New Invoice Batch Utility rewrite
- New Multi-select Custom Field
- Enhanced Grid View for Custom reports
- New ability to download of PDF Invoices as merged document or separate PDF's
- Contact Address Chips when comping an email
- Modal views can be expanded in web client
- New Security Group Permissions for
    a. Transaction Locking rules
    b. Modifying Case Contacts
    c. Modifying Case Contact Roles
    d. Sending emails or SMS to non case contacts

## Other Enhancements

| Key | Description |
| --- | --- |
| CM-5260 | Integration needs ability to modify Case Info using REST API |
| CM-4349 | Documentation Tab columns not retaining position |
| CM-749 | Multi-Select Custom Field type |
| CM-780 | [Reports] Show results in "Grid" view option |
| CM-782 | Improved workflow for previewing a PDF of any document in the Accounts tab |
| CM-2173 | Consultant is returned to last URL after signing back in |
| CM-2216 | Business manager needs ability to import payments |
| CM-2244 | Ability to download invoices as separate files |
| CM-2245 | Admin can add custom fields to different entities in Case Manager |
| CM-2420 | Admin can add merge fields to SMS template and Plain Text templates |
| CM-2560 | All Grid column widths should be adjustable |
| CM-2588 | Web version supports launching calling apps (e.g. Teams) from case contacts screen |
| CM-2626 | Web version saves grid column order changes |
| CM-2731 | Admin can Duplicate a Custom Field |
| CM-2824 | Email Address Lockdown |

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| CM-2844 | Consultant can preview and save a PDF of any Transaction type |
| CM-2854 | Email addresses are rendered as a 'chip' |
| CM-2860 | Consultant can Right click on menu items |
| CM-2997 | Consultant can use tables in formatted text documents |
| CM-2996 | Can edit Company Entity details for a Case Contact is read-only |
| CM-3017 | Consultant can expand modals to full window |
| CM-3024 | Admin can configure task completion name |
| CM-3178 | Improve visibility of Sort Arrow on narrow columns |
| CM-3179 | Improve Web Grids - add "Group by Box" option |
| CM-3181 | Admin needs ability to rename a Estimate Template |
| CM-3189 | Improvements to Reminders Window |
| CM-3190 | Consultant can rename Document Title after successful upload |
| CM-3248 | Add auditing to Activities |
| CM-3247 | Add Auditing for Document Templates |
| CM-3218 | Add Auditing to Other Lists |
| CM-3217 | Add auditing for Employee List |
| CM-3265 | Add Auditing to Categories |
| CM-3255 | Consultant can create new email from Case Contact Email |
| CM-3254 | Admin needs ability to Print Selected Journal Entry |
| CM-3253 | Enhance Other Staff dual-lists window |
| CM-3368 | Admin can restrict modifying Case Contact details by security permissions |
| CM-3427 | Implement new CHIPS UI when selecting a mobile number |
| CM-4131 | New Security Permission for SMS Mobile numbers |
| CM-3441 | Admin can easily differentiate between Case List Views with the same description |
| CM-3446 | Modify Case Details Custom Field Source |
| CM-3632 | Admin can see changes in audit history when editing a multi-select custom field |
| CM-3715 | Show a helpful message when creating a Case and all Categories are inactive |
| CM-3722 | Consultant does not see a "foreign key constraint" error message after deleting a cost |
| CM-4167 | Update Auditing to include when Reports are run |

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## Defects Fixed

| Key | Description |
|---|---|
| CM-5275 | Custom Fields. Modify Permission deny fails |
| CM-5264 | Estimate error - Delete an estimateCost fails |
| CM-5246 | Custom Fields. Move up/down fails |
| CM-5229 | Category Estimate settings are not displayed correctly when navigating the grid |
| CM-5219 | Estimate costs marked as non-billable are not displaying in red |
| CM-5193 | Report. Export List to Excel generates html code in subtotals |
| CM-5191 | Can create more than 1 workflow step with no parent |
| CM-5185 | Case Manager Web doesn't display error message for missing external files |
| CM-5183 | Document Templates - Audit History does not record the "Updated" status for an external file |
| CM-5179 | Document templates window is broken in Windows app |
| CM-5164 | New Invoice with new cost is not saved |
| CM-5154 | Report - Overdue Accounts by Company. Exclude closed cases is not saved |
| CM-5143 | Costs Grid. Linked To Estimate tooltip is broken |
| CM-5139 | Email To, CC and BCC fields are not saved in Draft |
| CM-5137 | Audit History: filter by all fails |
| CM-5136 | XERO does not export contact information to Xero Invoice Reference Field |
| CM-5130 | Unable to save appointments |
| CM-5128 | Save custom field fails |
| CM-5122 | Send Email with attachments fails |
| CM-5119 | Icons for Associated Cost and Attached Files are missing in Documentation grid |
| CM-5118 | MedEbridge pending referrals connection fails |
| CM-5116 | Transaction manager error |
| CM-4755 | Blank Emails issue |
| CM-4591 | New Case creation fails due to a custom field |
| CM-4581 | Custom fields doesn't show up correctly in Activities |
| CM-4545 | Newly created case contact is not displayed in To field when creating a new email |
| CM-4544 | Validation Error encountered when adding one or more documents from local machine |
| CM-4543 | Icons for Associated Cost and Attached Files are missing in Documentation grid |

| CM-4542 | Case Document attached to a draft email disappears after adding a Local File |
|---------|------------------------------------------------------------------------------|
| CM-4360 | Double clicking on the attachments tab when there is none the app crashes |
| CM-4357 | Document icons are missing from the grid in Documentation tab |
| CM-4318 | Sales Summary Report error |
| CM-4267 | Case Manager freezes when loading preview for certain DOCX Files |
| CM-4152 | Invoice batch utility error - "Wait operation timed out" |
| CM-4122 | User can still acquire a document lock when document is not editable |
| CM-4119 | Multi-select custom field can be created with duplicate reference |
| CM-4069 | Custom Fields. 'Display on Case Details' should be available only for 'Case Custom Fields' |
| CM-4068 | Costs Tab. Inconsistency in Duration field between editor and grid |
| CM-3997 | Error when double clicking on AddCost Grid |
| CM-3992 | Creating a new invoice fails |
| CM-3936 | Document is not locked if the file fails to download by Document Manager |
| CM-3917 | VPN cannot be established on fresh install of Windows version |
| CM-3876 | Case Cost is not selected when the Timesheet locate button is clicked |
| CM-3824 | Unable to view workflow or create new workflow step |
| CM-3771 | Workflow designer Web - Creates Multiple instances when an error occurs |
| CM-3739 | Multiple tabs are opened when locking an external file |
| CM-3721 | New Company column settings are not applied after save |
| CM-3634 | Error encountered when creating a new recurring appointment |
| CM-3509 | Error thrown when printing email |
| CM-3488 | Changes in Case Details page not saved |
| CM-3487 | Duplicating a List custom field does not copy its Reference List |
| CM-3405 | Property setter error when creating a new Document Termplate |
| CM-3384 | New invoice performance issue |
| CM-3378 | "Invalid attempt to read when no data is present." error message is encountered when sending email |
| CM-3356 | Cursor position moves when using Kendo Rich Text Editor in a modal |
| CM-3354 | Case Manager Windows : Error when editing any fields under Employee list |
| CM-3328 | Case Manager windows locks up after selecting Reply |
| CM-3268 | Additional options in Reports are cleared when exporting |
| CM-3257 | The merge fields <<AssignedToService>> does not work |

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| CM-3236 | Sys Admin > Cannot Create new Employee or alter permissions on an existing Employee |
|---|---|
| CM-3187 | Case Manager error for email references the wrong field |
| CM-3107 | Sorting by Category does not work with Document Templates Grid |
| CM-2881 | Custom Field error on winforms when closing the custom fields window |
| CM-2875 | Navigation is broken in some grids |
| CM-2843 | User is unable to print Adjustment, Payment or Refund |
| CM-2552 | Billable Hours Case List Column shows a '$' symbol. |
| CM-1310 | Workflow Step not Deleting |

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# Case Manager V6.3 - Release Notes

## New Features

Please visit our Learning site for more detailed information on new features and improvements to Case Manager at https://learning.casemanager.biz/web/WhatsNew/WhatsNew6-3.htm

**Summary of Key Features added to the 6.3 Release**
- Improved Rounding Options
- Global Time Zone
- New Auditing Capabilities
- Modern Authentication for Office365 email
- Pending referrals Integration with MedEbridge
- Xero Integrations Dashboard
- Merge Fields for Custom Columns
- New Office Add-in for document templates
- Bulk Import Payment Utility

## Other Enhancements

| Key | Description |
|---|---|
| CM-4391 | Group activities by date on invoices |
| CM-4275 | New Formatted Test Notes open in popup window |
| CM-3919 | Consultant cannot access restricted Case Information using the Global Search Tool |
| CM-3916 | Consultant can upload common video files |
| CM-3692 | Document Lock is invoked when editing a draft email |
| CM-3638 | When locking a document for editing consultant sees document title |
| CM-3579 | Admin can disable document preloading when switching cases |
| CM-3261 | New Document Manager Installer |
| CM-3227 | Support can rename Flag fields for customers |
| CM-3225 | User Column Choices are not saved in Estimates Grid |
| CM-3215 | Ability to include or exclude multiple charge codes in Invoice Generator |
| CM-3182 | Consultant can select Modern Auth under User Options |
| CM-3123 | Claiming.com.au : Update API from V1 to V2 |
| CM-3095 | Consultant sees warning in callout when an external file cannot be found in Document Storage |
| CM-3076 | REST API : Improve error message when user is unauthorised |

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| CM-3036 | New Workflow trigger based on Estimate Start Date and End Date |
|---------|---------------------------------------------------------------|
| CM-2770 | Document Manager : Improve document locking |
| CM-2703 | File upload animation is displayed on file Drag & Drop |
| CM-2697 | Admin can configure options for Lists |
| CM-2670 | Consultant can select Activity Cost that matches their Employee Service Type |
| CM-2669 | Admin can create an Estimate for Multiple Service Types |
| CM-2659 | Admin can configure visibility of Activities by Service Type |
| CM-2632 | Web version, when case tabs don't show text, show text as tooltip |
| CM-2609 | Convert large inline images to attachments when importing email |
| CM-2536 | Consultant can see tooltip on custom fields |
| CM-2439 | Set correct intermediary acceptance status when closing a case |
| CM-2417 | Update User Options with new modern auth settings for EWS |
| CM-2384 | Ability to add new items to dropdown menus |
| CM-2377 | Changes to Case Contacts are not visible in View History |
| CM-2376 | UI Changes to Auditing |
| CM-2373 | Consultant sees message when trying to edit a binary document template |
| CM-2353 | Update CM Windows UI to use new Email Configuration Options |
| CM-2297 | Consultant can preview Document side by side to the Wizard |
| CM-2204 | Make text field for text documents |
| CM-2150 | Custom calculated column appears as a merge field option in document templates |
| CM-2048 | Case Manager Web: Consultant can see record when external file has been edited |
| CM-1988 | Improve Error Message when Sending a Test Email |
| CM-1893 | System admin can verify Custom Fields changes are recorded to the audit table |
| CM-1875 | System Administrator can disable Audit History |
| CM-1684 | Export Binary Data to External Storage |
| CM-1664 | Case Manager Web: Export all rows to excel from case list grid |

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## Defects Fixed

| Key | Description |
|-----|-------------|
| CM-4612 | Document error "The specified key does not exist" |
| CM-4424 | Lock on Employee table causes timeout issues for ALL users accessing the same database |
| CM-4355 | Clicking a document from the grid will show an error in Preview section if the document is already open |
| CM-4330 | Case Manager does not use a signed version of NodaTime.dll |
| CM-4278 | Consultant edits document without getting latest changes |
| CM-4274 | Data grid auto scrolls back after user clicks a row |
| CM-4200 | Medicare verifying details error |
| CM-4152 | Invoice batch utility error - "Wait operation timed out" |
| CM-3909 | Error message is missing text when attaching a locked case document to an email |
| CM-3842 | Editing new document after adding a cost causes 'Document object has been modified by another user' error |
| CM-3840 | Email content is not readable when Printing the Document List |
| CM-3834 | Invoice Batch Utility : Unable to select item in grid |
| CM-3830 | Drag&Drop Emails fails with "Exception information" warning |
| CM-3822 | New Formatted Text document shows "Process cannot access the file" error |
| CM-3767 | Consultant is unable to change the date in a DateTime Custom Field that is used in a Workflow task |
| CM-3746 | Duplicate Key error shown when converting a document to PDF |
| CM-3713 | Error message displayed when saving Draft email |
| CM-3621 | Performance problems sending emails |
| CM-3596 | Error when Printing Document or Selecting for Archive Download |
| CM-3586 | Error message "Could not find part of the path .." when sending emails |
| CM-3584 | User cannot unarchive a case |
| CM-3491 | Invoice Batch Utility causes lag/slowness in windows |
| CM-3490 | Custom Field value cannot be modified after upgrade |
| CM-3404 | Unsafe characters in Titles is breaking Document Grid List |
| CM-3402 | Email Attachments are being sent with the same content |
| CM-3375 | System Options UI is very slow |

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|---|---|
| CM-3352 | Error is generated when Cancelling changes for a Formatted Text document |
| CM-3349 | Errors appear in RTF editor when creating a formatted text document |
| CM-3331 | "Process cannot access the file" error is displayed in email editor window |
| CM-3322 | Email verification errors appear though settings are correct |
| CM-3321 | Reply & Reply All on a Case Lock up Case Manager |
| CM-3315 | "Invocation error" occurs when printing an Adjustment or Refund |
| CM-3267 | Web Version - Payment UI is not displaying all fields |
| CM-3157 | Object reference error is displayed after signing in |
| CM-3156 | Consultant is unable to send email using EWS |
| CM-3155 | REST API : Document Lock edit rule is being triggered on upload |
| CM-3098 | Fixed width columns not working correctly |
| CM-3087 | Workflow trigger Change From-To fields are not saved |
| CM-3043 | An error occurs when creating a Workflow Trigger |
| CM-3021 | Email CC Field is not populated when sending out invoices via email |
| CM-2979 | User sees Authentication Timeout Warning after closing browser tab |
| CM-2942 | Case Manager Mobile: New user receives an error after configuring a new endpoint |
| CM-2940 | 404 Error is displayed when accessing existing Formatted Text Document or email |
| CM-2905 | The Save button is still disabled after changing the value in a Custom Field list |
| CM-2885 | Send Test Email always shows error |
| CM-2879 | Web version ignores inactive status when displaying items in custom field list |
| CM-2837 | Templates search box doesn't clear after initial use |
| CM-2833 | New Columns are not visible after selecting in the column chooser |
| CM-2819 | File Manager Spinner appears after downloading a file |
| CM-2815 | Layout Issue on New Invoice Form |
| CM-2812 | Layout Issue on Appointment Form |
| CM-2807 | Unable to Scroll on Workflow Designer form |
| CM-2805 | Error encountered when Duplicating a case |
| CM-2803 | Unable to save a custom user email signature for other employees |
| CM-2796 | Add Cost > Uncaught TypeError: Cannot read properties of null (reading 'id') |
| CM-2757 | Unable to load Saved List View |
| CM-2721 | Error displayed when creating a new Estimate Template |

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|---|---|
| CM-2683 | An error occurs when adding locked Documents as attachments |
| CM-2682 | Unable to delete attachment from a draft email |
| CM-2653 | User sees a security exception when changing the Tax Code |
| CM-2644 | Charge Code Truncation Issue |
| CM-2606 | Workflow - unable to modify completion date for workflow task |
| CM-2575 | Provide backward compatibility for EWS to still support Basic Auth |
| CM-2438 | Requirements and Referral fields are not saved in Case Creation Wizard |
| CM-2328 | Cost Description is truncated to 100 chars |
| CM-2306 | Unable to delete Document Template - SQL Server error |
| CM-2201 | Error displayed in console when Adding a new Case |
| CM-2198 | NetSparker Vulnerability: jQuery out of date |
| CM-2197 | NetSparker Vulnerability: Modernizer out of date |
| CM-2029 | Error when adding a new cost to an existing estimate |
| CM-1987 | Error when deleting Document |
| CM-1984 | Duplicate emails sent when using the invoice batch utility |
| CM-1969 | During Case Creation the security permission "Limit access to this case .." is not enforced |
| CM-1947 | Error displayed after saving a change in Contacts |
| CM-1719 | LockTransactions feature prevents cost being invoiced |
| CM-517 | Bank Deposit form report SQL inefficient when large number of payments |