

CSM 6.2.3 Release Notes

System Requirements

To install CSM 6.2.3 you must be running TeamConnect 6.2.1 or later.

After all requirements are met, perform the upgrade from the **Available Updates** block on the **About** page in TeamConnect. For more information about how to install, refer to the **Upgrade Considerations and Notes** below.

Important: *Do not customize the object definitions that comprise CSM (CSM Settings, Timekeeper, Vendor, Budget Request, and Rate Request) in any way. Customized versions of CSM are not eligible for support.*

Installation

You must have admin rights to install this product.

To install TeamConnect Collaborati Spend Management 6.2.3:

1. In TeamConnect, click the **Admin** tab, and then click the **Admin Settings** sub-tab link.
2. In the left pane, click the **About** link.
3. In the **Available Updates** section, click **Show Updates Available for Installed Products**.
4. Locate TeamConnect Collaborati Spend Management 6.2.3.
5. Click **Install Now**.
6. If the installation is successful, restart TeamConnect.

Note: *If the installation is not successful, TeamConnect Collaborati Spend Management 6.2.3 does not appear as an Installed Product.*

Upgrade Considerations and Notes

This section provides upgrade requirements and considerations for CSM 6.2.3. Details about the compatibility requirements for CSM and TeamConnect, and the related upgrade procedures, are available in the TeamConnect 6.2 Installation Help for your respective update. CSM 6.2.3 has the following upgrade requirements:



- Users must upgrade from CSM version 6.2.2

Enhancements

The following enhancements have been added in CSM 6.2.3. Each enhancement is documented in the following format:

- A description of the enhancement
- Internal tracking code
- Additional information, if applicable

These Enhancements are relevant for all Enterprise instances where Essentials is the foundation for Legal and Financial functionality.

Enhancement: The create tender button launches the Tender Request Wizard

Tracking code: TC-32020

Additional Information: This functionality ensures that a user that wishes to create a Tender Request can use a Wizard that will provide the ability to select a vendor with a Life of Matter budget, set tender request due dates, and attach a document with the Document Attachment Wizard to create the Tender Request. The tender request will then be synced to Collaborati through CSM and available to the vendors to provide their tendering information.

Enhancement: From the Tender Request Wizard, clicking the change phase button shows phases of Submit and Cancel.

Tracking code: TC-32034

Additional Information: Tender Requests can be set to a status of Submitted or Canceled. Submitted requests are synced to Collaborati. Canceled requests are not synced to Collaborati.

Enhancement: A single Tender Request or multiple Tender Requests can be Submitted or Rejected at once.

Tracking code: TC-32035

Additional Information: In the list of Tender Requests for a matter, a user can select a single or multiple Tender Requests by checking the checkbox next to it and then select an action to either "Submit" or "Reject" the request.

Enhancement: A single Tender Request or multiple Tender Requests can be Approved.

Tracking code: TC-32071

Additional Information: By selecting the checkbox next to a single or multiple Tender Requests with the current status "Pending Approval", a user can select the Approve button to move the requests to Approved status. By selecting the checkbox next to a single or multiple Tender Requests with the current status "Waiting for Approval", a user can select the Approve button to move the requests to Approved status.

Enhancement: Email can be sent to a vendor to notify them that their Tender Request was rejected.

Tracking code: TC-32072

Additional Information: Select a Tender Request with the status Rejected or Rejected (pending Sync), click the Sent Not Selected Notification button and an email will be sent to the contact card primary email address for the vendor



contact.

Enhancement: A Pending Tender Request can be transitioned to Revised

Tracking code: TC-32073

Additional Information: When the checkbox is selected next to a Pending Tender Request and the Revise button is clicked, the Tender Request status is changed to Renegotiate (pending sync). The Tender Request is then sent back to the vendor via Collaborati.

Enhancement: Potential vendor accounts are removed when their Tender Request is not selected

Tracking code: TC-32074

Additional Information: When using Essentials as the base for TeamConnect, Matters can be created with potential vendors added as involved parties. Matter Budgets can then be created with those potential vendors. If that vendor's Tender Request is rejected, their corresponding account is deleted for that fiscal year.

This is implemented for Essentials with 2 rules that are **inactive** by default on install:

CSM - Delete Accounts on Reject

CSM - Delete Accounts on Reject(No Sync)

Enhancement: With Essentials as the Legal and Financial functional base for Enterprise, Budget Requests can be created.

Tracking code: TC-32075

Additional Information: A Budget Request is able to be submitted and Collaborati is able to receive and push back Budget Requests.

Enhancement: Automatic Budget Request and Tender Request creation based on category selection configuration in CSM Settings.

Tracking code: TC-32449

Additional Information: When using Essentials as the base for TeamConnect, the CSM Settings budget tab has an option to select a category such that Budget Requests and Tender Requests will be automatically created and submitted to Collaborati for Vendor Review for Matters with that primary category.

This is implemented for Essentials with 2 rules that are **inactive** by default on install:

CSM - Create Budget Account on Create if Active

CSM - Create Tender Account on Create if Active

Enhancement: Tender Requests can be created with custom Budget Templates

Tracking code: TC-32450

Additional Information: When using Essentials as the base for TeamConnect, Budget Templates that are customized with available options (Line Item Codes, International Tax, Time Periods, etc) can be used for Budget Requests and Tender Requests.



Resolved Issues

The following enhancements have been added in CSM 6.2.3. Each fix is documented in the following format:

- A description of the issue
- Internal tracking code
- Salesforce case number

The following were fixed in an Earlier Version and merged into this Version.

Issue: CSM sync breaks when processing a Rate Request with large number of rate items

Tracking code: SUPPORTPRI-53558

Salesforce Case Number: 2020-0214-585355

Issue: Timekeeper authorization is extremely slow and timing out

Tracking code: SUPPORTPRI-52914

Salesforce Case Number: 2019-1212-572752

Issue: Resolved an issue preventing rest calls from establishing connection to Collaborati if CSM was connecting to Collaborati via proxy

Tracking code: SUPPORTPRI-48605

Salesforce Case Number: 2019-0423-522669

Issue: Manual authorization of Timekeepers should not add errors to logs

Tracking code: SUPPORTPRI-47290

Salesforce Case Number: 2019-0226-510105

Issue: When TeamConnect updates a matter number, Collaborati does not update accordingly

Tracking code: SUPPORTPRI-46578

Issue: CSM > Sync breaks if the vendor updates the Timekeeper ID of a previously authorized Timekeeper in Collaborati and creates a new Timekeeper with the same ID as the previous Timekeeper.

Tracking code: SUPPORTPRI-45873

Salesforce Case Number: 2019-0116-501086

Issue: Validate Document Category rule is preventing a user from accessing a document that they should have rights to read

Tracking code: SUPPORTPRI-45837

Salesforce Case Number: 2018-1218-496456

Issue: CSM stuck in infinite loop when 16 rate requests fail to get created

Tracking code: SUPPORTPRI-43752

Salesforce Case Number: 2018-1008-481905



Issue: Expense charges that exceed acceptable costs have a rule to auto-adjust the unit cost and the unit cost is being adjusted incorrectly to 2 decimal places rather than 3 decimal places of the assigned price

Tracking code: SUPPORTPRI-41822

Salesforce Case Number: 2018-0713-464129

Issue: Timekeeper IDs do not sync when changed on the Collaborati side

Tracking code: SUPPORTPRI-40695

Issue: CSM Timekeepers are creating duplicate contacts in TeamConnect

Tracking code: SUPPORTPRI-39369 / SUPPORTPRI-37896

Salesforce Case Number: 2017-0717-385553

Issue: A user with rights to create, update matters/involved parties where AFAs are enabled, is getting an error when trying to add an involved party on a record because they do not have rights to the CSM Settings record. They should be able to add the involved party without rights to the CSM Settings record.

Tracking code: SUPPORTPRI-37992

Salesforce Case Number: 2018-0424-446909

Issue: When copying invoices for non-U.S. clients, the U.S. tax rate is not set to zero.

Tracking code: SUPPORTPRI-37444

Salesforce Case Number: 2017-1219-421775

Issue: Resolved an issue where the first time a vendor is mapped from Collaborati a default Timekeeper contact is not being created by system user

Tracking code: SUPPORTPRI-31627

Salesforce Case Number: 2017-0828-394417

Issue: CSM activates ClientVendor for every vendor at once

Tracking code: SUPPORTPRI-48603

Case number: 2016-0822-268432

Issue: Issue with OOTB CSM rule on Invoice object for checking duplicacy

Tracking code: SUPPORTPRI- 50188

Case number: 2019-0605-531654

Issue: Duplicate adjustment when there exists a matter rate and default rate for same time period for a Timekeeper

Tracking code: SUPPORTPRI- 50710

Case number: 2019-0506-525243

Issue: CSM > TK Portal > Shows <Vendor Name> added 0 new Timekeepers

Tracking code: SUPPORTPRI-49568

Case number: 2019-0517-527940

Issue: The rate request portal pane shows the wrong info for "Requested By"

Tracking code: SUPPORTPRI- 50652



Case number: 2018-0822-472427



https://success.miratech.com/TeamConnect/TeamConnect_Module_Guides/Collaborati_Spend_Management_-_CSM/CSM_...

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