

Essentials 6.2 Release Notes

This page details the new features, feature enhancements, bug fixes, and known issues for the Essentials 6.2 release.

How to read the Release Notes

System Requirements: This section details all of the modules that Essentials can pair with, along with the appropriate version.

New features, new functionality, and bug fixes: The feature enhancements, known issues, and bug fixes on this page are broken down in following way, respectively:

- A description of the issue or feature
- Internal tracking code
- Salesforce case number, if applicable
- Additional information (for features)

System Requirements

TeamConnect Essentials 6.2 is designed to pair with the following modules:

- Base Module - Essentials 6.2
- Platform - TeamConnect Enterprise 6.2
- Sisense 7.1.0.11010
- Elasticsearch 7.1.1 with Search Guard **7:7.1.1-36.0.0**
- AP Export Link 5.0.0 Patch 2
- Office Suite Integration 3.2
- TAP Integration (latest version)
- Collaborati Integration (latest)
- CSM - 6.2 (latest version_)
- SAML 2.1



New Features and Functionality

Introducing TeamConnect Essentials Reporting!

Use our integrated dashboards and reports to keep track of your matters, financials, and vendors.

Learn more about our reports [on this page](#).

Feature Enhancements

TeamConnect Essentials 6.2 introduces the following feature enhancements:

Issue: Error message occurred when user tried to access certain search views.

Tracking Code: TC-29405

Salesforce Case Number: 2019-0423-522629

Enhancement: Invoices can now be routed based on monetary thresholds that are placed on users' contact cards. Threshold workflows and relationships can be set up within users' contact cards, which the invoices will follow a "chain of command" before being approved.

Tracking Code: TC-19447

Additional Information: This new routing option does not replace the default "main assignee" routing options, but it does give users more automated routing options. Learn more about this routing option [here](#).

Enhancement: The UI and some of the language was updated on the Matter Invoice screen to reflect the new *contact relation* invoice routing option (described above).

Tracking Code: TC-21959

Additional Information: These changes do not have any impact on how users will interact with the application.

Enhancement: The UI was cleaned up and rearranged on the *Matter General Information* screen.

Tracking Code: TC-25249

Additional Information: These changes do not have any impact on how users will interact with the application.

Enhancement: Attorneys and paralegals can now associate corporate projects and corporate products to a matter.

Tracking Code: TC-22273

Additional Information: Adding corporate projects and products to a matter allows clients to internally associate matters to each other, and it assists with reporting. Learn more about corporate projects and products [here](#).

Enhancement: Users can create a filtered search that allows them to see the name of the *final approver* of an invoice. This information is automatically exported to an AP feed

Tracking Code: TC-24388

Additional Information: This information cannot be seen in any of the invoice screens, but it can be searched and reported on.



Enhancement: Any users that are in the *Standard Legal User* security group will not be able to manually add invoices to TeamConnect Essentials, unless they have additional rights that allow them to add and manage invoices.

Tracking Code: TC-26673

Additional Information: The ability to add invoices to the system was removed from the *Standard Legal User* security group. Learn more about security groups [here](#).

Enhancement: The *Allows Total Matter Expense Tax* and the *Allows Total Matter Fee Tax* budget template settings are now disabled for all out-of-the-box budget templates.

Tracking Code: TC-28742

Additional Information: Learn more about budget templates [here](#).

Enhancement: There was additional UI/UX cleanup on the *Matter General Info* page.

Tracking Code: TC-22641

Additional Information: Matter sub-type is now an editable field, [Corporate Projects and Product fields were added](#) to the page, and the Entity Field was added.

Enhancement: Search views for *My Closed Matters*, *My Open Matters*, and *Open Matters* were added to the Office Suite search views.

Tracking Code: TC-29290

Additional Information: This was a configuration defect (SF: 2019-0226-510276) that turned into a feature. Learn more about Office Suite for Essentials [here](#).

Enhancement: Cost Centers can be entered into 6 different fields (within a matter), and can be pulled into Accounts Payable in 6 fields (rather than 1 big field).

Tracking Code: TC-21477

Additional Information: Learn more about Cost Centers [here](#).

Enhancement: The *Hide Tax in Budget Headers* Budget Settings rule is automatically enabled.

Tracking Code: TC-24519

Additional Information: When this setting is turned on, the *Budget General Info* block doesn't show taxes in the *Total Budgeted* or *Total Spent*. But taxes information will still show up in the budget table. Learn more about budgets [here](#).

Enhancement: Custom objects are reportable in BI (as of 6.1). This is not turned on by default. A configuration item was added to the installation of the Essentials module to explicitly make these fields reportable.

Tracking Code: TC-24896

Additional Information: This information is for hosting, services, and users that have system administrators or all rights security permissions.

Enhancement: The *Enable Posting without Tax* budget template setting is turned ON by default.

Tracking Code: TC-30149

Additional Information: This information is for hosting, services, and users that have system administrators or all rights security permissions.



Enhancement: The menu options on the left side of the matter screen were rearranged.

Tracking Code: TC-24773

Additional Information: This has minimal impact on the end user.

Known Issues

The following issue is known by our development team and is being researched to find a fix. A workaround is provided for the following issue:

Issue: Clicking the Help button on the User Preferences page incorrectly redirects users to the Mitrates home page (on the web) rather than to the User Help.

Tracking Code: TC-11517

Workaround: Visit the Client Success Center [via this link](#).

Issue: Global Search's object did not change to match the object that was searched. For example, clicking on an object menu item like Contacts takes user to the Contact home page. But once user performs an actual search on Contacts, the Global search object does not change to match.

Tracking Code: TC-27415

Issue: In the Exchange Rate Tool automatically rounds the value to the nearest thousands

Tracking Code: MB-5

Issue: An error occurs when any of the *Additional Invoice Approver* stops are left blank.

The screenshot shows the 'Matter Invoices' page for Matter - 000106-T5824464 - Matter - 0001. A red error banner at the top states: 'Error: Cannot save with a blank user name'. The page displays a table of invoices with one entry: T5824464 - Invoice - 0001, Standard, dated 8/14/19, for \$2,000.00, with status 'Not Posted'. Below the table is the 'Approval Settings' section. It includes a 'MAIN ASSIGNEE' field with the value 'T5824464.User.A, T5824464.User.A'. There are checkboxes for 'ADDITIONAL STOP?' and 'ADD INVOICE HANDLER', both of which are checked. The 'ADDITIONAL STOP 1' field is empty, and a red arrow points to it. The 'ADDITIONAL STOP 2' field contains 'Flood, Mark'. The 'INVOICE HANDLER' field also contains 'Flood, Mark'. A note on the right states: '*Note: By Default, Invoices will route according to approval limits set on the Main Assignees' contact cards. If no limit is set, invoices will route to only the Main Assignee. Approval limits will be ignored if additional stops are manually set using the Additional Stop or Invoice Handler functions'.

Number	Type	Date	Vendor	Total Amount (USD)	Status
T5824464 - Invoice - 0001	Standard	8/14/19	T5824464.User.A, T5824464.User.A	\$ 2,000.00	Not Posted
				\$ 2,000.00	

Approval Settings

UTILIZE APPROVAL LIMITS:
No

* MAIN ASSIGNEE :
T5824464.User.A, T5824464.User.A

ADDITIONAL STOP? ☒

ADDITIONAL STOP 1:

ADDITIONAL STOP 2:

INVOICE HANDLER:

ADD INVOICE HANDLER ☒

*Note: By Default, Invoices will route according to approval limits set on the Main Assignees' contact cards. If no limit is set, invoices will route to only the Main Assignee. Approval limits will be ignored if additional stops are manually set using the Additional Stop or Invoice Handler functions



Tracking Code: TC-30604

Workaround & Documentation: If an Essentials client just wants to add 1 user, then they can use the option "Add Invoice Handler" Another option would be using a custom routing template. See [this page](#) and [this page](#) to learn more about invoice routing.

Resolved Issues

The following list includes bugs that were resolved as well as configuration changes:

Issue: Error message occurred when user tried to access certain search views.

Tracking Code: TC-29405

Salesforce Case Number: 2019-0423-522629

Issue: Due dates on invoice routes were inconsistent - they did not have the same amount of time until expiration.

Tracking Code: TC-22501

Salesforce Case Number: 2018-0725-466565

Issue: The language in some of the screens was cleaned up.

Tracking Code: TC-29351

Salesforce Case Number: 2019-0314-514078

Issue: The *Do Not Allow Multi-matter Invoice except Line Item Projects with Specified Project Categories* CSM Validation rule was turned off, which allowed incorrect invoices to be processed when submitted through Collaborati.

Tracking Code: TC-29361

Salesforce Case Number: 2019-0130-503907

Issue: Users with *System Admin* rights and permissions did not have access to the User Preferences and Email Notifications section of the preferences screen.

Tracking Code: TC-29371

Salesforce Case Number: 2019-0319-515037

