

Essentials 6.1 Release Notes

How to read the Release Notes

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)
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System Requirements

TeamConnect Essentials 6.1 is designed to pair with the following modules:

- TeamConnect Enterprise 6.1
 - CSM 6.1
 - Collaborati 3.7
 - Office Integration 3.1
 - AP Export Link 5.0
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Feature Enhancements: Here's What's New

TeamConnect Essentials 6.1 introduces the following enhancements:

Administrators can add new users

Enhancement: Users with *system administrator* rights can now manually add new users to the system and assign them to security groups. Assigning users to security groups gives them permission to different areas of the site and allows



them to see certain matters.

Internal Tracking Code: TC-9547

Additional Information: Read more about [creating new users here](#), and [security groups here](#).

CSM and AFA Volume Discounts

Enhancement: AFA Volume Discounts were added to the CSM sync process and can be viewed by vendors.

Internal Tracking Codes: TC-20118

Additional Information: Read more about [AFA Volume Discounts here](#).

Budget Templates

Enhancement: The *Allow Negative Tax* and *International Tax* settings are automatically enabled on Budget Templates. When these settings are enabled, negative balances and international taxes will appear on budgets and invoices.

Internal Tracking Codes: TC-24515, TC-24516, TC-24518

Additional Information: These options for budget templates are found in the *Templates* sections of the *Budget Settings* screen.

Invoice Workflow Improvements

Enhancement: Invoice workflows will be based on the Main Assignee of a matter OR by an employee's *approval threshold* that is set on a user's Contact Card.

Additional Detail: By default, invoices will be assigned to a workflow based on the approval amount threshold set in the user's contact card. If no threshold is set, then the invoice will go to the main assignee set on the matter. System administrators and eBilling managers are the only users who are allowed to set and edit the threshold amounts, standard legal users cannot.

See the following pages for more detail on Invoice Approval Workflows

- What's the logic behind invoice approval routes? [Find out here!](#)
- Can I restart an invoice workflow if it expires? [Yes you can!](#)
- Can I reassign an invoice to a new user? [Yes you can!](#)

Additional Feature Enhancements and Bug Fixes

Feature enhancements and bug fixes from the following releases are also included in Essentials 6.1:

[Essentials 6.0 SP1](#)



[Essentials 6.0 SP2](#)

[Essentials 6.0 SP3](#)

[CSM 6.0 SP1](#)

[CSM 6.0 SP2](#)

Known Issues

The issues listed below are known limitations in Essentials 6.1. Our development team is aware of the issue(s) and is working on finding a fix:

Issue Description: If someone is viewing the *All Users* screen, the total count of the users (at the top of the table) is inconsistent with the actual number of users that person has rights to view.

Internal Tracking Code: TC-24791

Additional Information: In the screen shot below, you can see that the All Users table claims there are 15 users, but only 14 are listed.



Expand All

Users - All Users New Export Results Sort Printable View

Admin

Users

- Custom Search
- Recently Viewed
- Inactive Users
- Normal Users
- Limited-Privilege Users
- Active Users
- All Users
- Super Users
- New Users

Groups

Modify Filter

Users 1 - 15 of 15

Edit	Name	Type	Description	Active
	User 1	Normal		Yes
	User 2	Normal		Yes
	User 3	Super		Yes
	User 4	Normal		Yes
	User 5	Normal		Yes
	User 6	Normal		Yes
	User 7	Normal		Yes
	User 8	Normal		Yes
	User 9	Normal		Yes
	User 10	Normal		Yes
	User 11	Normal		Yes
	User 12	Normal		Yes
	User 13	Normal		Yes
	User 14	Normal		Yes

Users per page: 50

Bugs: Here's what was fixed

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

Issue Description: The *My Closed Matters* and *My Open Matters* Search Views did not appear in the Office Suite add-in.

Internal Tracking Code: TC-22502, TESS-643

Salesforce Case: 2018-0725-466566

Issue Description: The "Default" role was removed. Users must choose an actual role for matter assignees.

Internal Tracking Code: TC-22480, TESS-251

Salesforce Case: 2018-0819-471534



Issue Description: Invoices that did not have cost centers could not be voided.

Internal Tracking Code: TC-24448, TESS-571

Salesforce Case: 2018-0919-477915

Issue Description: Users in the security groups *CSM Admin* and *Mitratech Admin* were not able to create, edit, delete, or mass edit CSM records.

Internal Tracking Code: TC-22476, TESS-161

Salesforce Case: 2018-0817-471412

Issue Description: The naming convention for cost center mapping to invoices was not intuitive and was confusing clients.

Internal Tracking Code: TC-22481, TESS-271

Salesforce Case: 2018-0819-471536

Issue Description: An error was displayed when users (who were assigned to the correct security groups) tried to view a list of Active Authorized Vendors in CSM Management.

Internal Tracking Code: TC-22485, TESS-371

Salesforce Case: 2018-0823-472695

Issue Description: When searching for matters in Search Views, the *Open Date* incorrectly showed the *Created Date*. This occurred after a user edited the *Open Date* in a matter, then searched for it by Open Date.

Internal Tracking Code: TC-22483, TESS-351

Salesforce Case: 2018-0823-472643

Issue Description: User could not see a list of Active Vendors using the search view unless they subscribed to the list.

Internal Tracking Code: TC-24007, TESS-961

Salesforce Case: 2018-1130-492997

Issue Description: HTML tags appeared on the screen when user tried to reset their password.

Internal Tracking Code: TC-22470, TESS-612

Salesforce Case: 2018-1016-483666

Issue Description: Global Search did not index on a schedule as it should have.

Internal Tracking Code: TC-24706, TESS-1032

Salesforce Case: 2018-1218-496624

Issue Description: Error displayed when firms use LEDES 2000 XML file formats.

Internal Tracking Code: TC-22487, TESS-401

Salesforce Case: 2018-0904-474848

Issue Description: The *Budget Rollover* tool did not roll over all of the budgets attached to matters, and displayed a security exception error. The budgets were not created and the tool gave no indication that any budgets were skipped.

Internal Tracking Code: TC-25172, TESS-1052

Salesforce Case: 2019-0102-498098



Issue Description: Users that were added to the approval route on a matter could not view and approve invoices assigned to them. The users that were added did not have rights or permissions to see that specific matter type, but were added to the approval route so they should have been able to see and approve the invoice.

Internal Tracking Code: TC-22488, TESS-441

Salesforce Case: 2018-0906-475477

Issue Description: The notifications for invoice reminder defaulted to the old template rather than the new, updated template.

Internal Tracking Code: TC-22493, TESS-521

Salesforce Case: 2018-0919-477972

Issue Description: Users with eBilling and CSM rights were able to add new stops in the Routing Template > Stop Management page. They should not be able to add new stops from this page.

Internal Tracking Code: TC-22624, TESS-21

Salesforce Case: 2018-0725-466465

Issue Description: The Cost Center Installer was removed from the installer set-up page because it is not needed and installs incorrect files.

Internal Tracking Code: TC-22628, TESS-141

Salesforce Case: 2018-0814-470483

Issue Description: AP Feed did not display *Cost Center Amount* in exported .csv file.

Internal Tracking Code: SUPPORTPRI-45131

Note: This issue was fixed in Essentials 6.0 SP3 and was merged into Essentials 6.1.

Configuration Changes

Configuration Issue Description: The Security Administrator group did not have *Matter Delete* rights. These rights were added so that administrator users have the ability to delete unsound matter requests.

Internal Tracking Code: TC-24708, TC-25209, TESS-1042

Salesforce Case: 2018-1220-497086

Configuration Issue Description: The *General Ledger* field, found in the Cost Center column display within a matter and/or invoice, was removed from TeamConnect Essentials.

Internal Tracking Code: TC-22475, TESS-561

Salesforce Case: 2018-0919-477916

Configuration Issue Description: Request for feature enhancement to auto-populate cost centers with 100% allocations.

Internal Tracking Code: TC-22491, TESS-501

Salesforce Case: 2018-0919-477996



Configuration Issue Description: Request to add an *Entity* field to the AP feed so clients are able to pay invoices.

Internal Tracking Code: TC-24704, TC-22484, TESS-1022, TESS-361

Salesforce Case: 2018-1219-496986, 2018-0823-472646

Configuration Issue Description: When installed, the Office Suite *Display Column Settings* only display the Author field. The default settings were adjusted so that more metadata fields for documents show.

Internal Tracking Code: TC-22625, TESS-51

Salesforce Case: 2018-0726-466772

Configuration Issue Description: Request to remove the default amount of \$50 from the Expense Unit Pricing field in an invoice's General Expenses section.

Internal Tracking Code: TC-22490, TESS-481

Salesforce Case: 2018-0917-477481

Configuration Issue Description: The Converted Number field (CONT_ConvertedNumber) was removed from the Contact object.

Internal Tracking Code: TC-22627, TESS-111

Salesforce Case: 2018-0808-469281

Configuration Issue Description: The Mitratech Admin security group should have the following rights: *grant Tool Rights, rights to view/edit eBilling roles, and rights for Report Integration Tool so they can set up SiSense,*

Internal Tracking Code: TC-22794, TESS-892

Configuration Issue Description: The ability to create a copy of cost centers was removed from the following security groups: *Standard Legal User, AP Admin, CSM Admin, eBilling Admin, Report Designer, and Workflow Process Manager.*

Internal Tracking Code: TC-22506, TESS-633

Configuration Issue Description: The *Invoice AFA Details* block was added to the Invoice object view.

Internal Tracking Code: TC-22796, TESS-912

Configuration Issue Description: Only the following objects will be indexed on Global Search: *Appointments, Contacts, Documents, Invoices, Matters, and Tasks.*

Internal Tracking Code: TC-22802, TESS-932

