

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)

1 System Requirements

TeamConnect Essentials 6.3 is designed to pair with the following modules:

- Base Module - Essentials 6.3
- Platform - TeamConnect Enterprise 6.3
- TCBI 6.3 / Sisense 8.2
- Elasticsearch 7.1.1 with Search Guard 7:7.1.1-37.0.0
- AP Export Link 5.0.0 Patch 3
- Office Suite Integration 3.2+
- TAP Integration (latest version)
- Collaborati Integration (latest)
- CSM - 6.2.4
- SAML 2.1

2 Feature Enhancements

TeamConnect Essentials 6.3 introduces the following feature enhancements:

Issue: The new Interactive Line Items invoice review is now the default view for reviewing invoice line items. The user guide for the interactive line items can be found [here](#).

Tracking Code: TC-31627

3 New Features

Matter Budget Insights

The Matter Budget Insights widget displays the Total budget account associated with a selected matter. This widget analyzes the Vendor accounts allocated and to review total spending and the budget for the linked Matter of an invoice. Added a custom block in the Matter Budget Insight widget that helps to hold the Matter Budget.

The Matter Budget Insights widget displays the following information in the form of charts:

1. Total matter budget
2. Total matter spend
3. With this Invoice approved
4. With all Pending Invoices Approved
5. This Invoice amount

Enhancement: [EAB] - MBI - Disclaimer for Tax, Always display System currency & Include Internal Expenses

Description:

The following information is displayed in the MBI widget depending on the budget selection for Disclaimer on Tax, Matter Budget Insights system currency & Include Internal expenses:

- In Vendor Budgets:
 - The amounts in the Matter Budget Insights are inclusive of taxes and are always displayed in the system currency.
- In Matter Budgets
 - The amounts in the Matter Budget Insights are inclusive of taxes, internal expenses and are always displayed in the system currency

Tracking Code: TC-35097

Enhancement: [EAB] - MBI block to be hidden before WF & after Invoice Approval

Description:

The MBI block is hidden for the following scenarios:

- When an Invoice is not in the workflow.
- In the approved Invoice of the workflow.

Tracking Code: TC-35052

Enhancement: [EAB] - Matter Budget Insights Design - Enhancements

Description: Renamed the top two horizontal bars of Matter Budget Insights:

- Total matter budget as Allocated Matter Budget with color code as #4599BA.
- Total matter spends as Total Matter Budget Spend.

When the user reloads the page, the system displays the latest amount in the Allocated Matter Budget bar in the allocated budget. The changes in the adjusted amount is displayed in The Invoice Amount data container.

Tracking Code: TC-34631

Enhancement: [EAB] - Matter Budget Insights Interactivity

Description:

- The left side widget has 5 clickable horizontal bar charts.



- On clicking any of the bar charts, the system reacts and updates the value on the horizontal bar chart on the right widget. Reacts is defined by the vertical line indicator appearing to point at the position on the right bar chart where the value is represented
- By default, the system displays the Allocated Matter Budget value.
- There is no "cleared" position - some value is always indicated
- If the budget type for that matter is an Annual (instead of lifetime) budget, update the word Lifetime in the panel with Annual.
- If the spent value exceeds the budget value in terms of the percentages displayed in the right bar, the system "pins" the vertical line against the farthest right point on the bar.
- The system updates the label on the vertical bar indicator with dollar amounts and percentages that exceed the limit of the scale of the bar.
- The right side horizontal bar displays the following percentile values:
 - Green = 0 to 80%
 - Orange = greater than 80% to 100%
 - Red = greater than 100% to 125%
 - Dark Red = greater than 125%.

Tracking Code: TC-34629

Enhancement: [EAB] Matter Budget Insights - Dropdown Interactivity

Description: Introduced a new Showing Budget for drop-down field with the following values:

- **All** - Consolidated budget view of months, quarters & years.
- **Monthly** - Displays the monthly budgets as per the current Invoice.
- **Quarterly** - Displays the quarterly budgets as per the current Invoice.
- **Yearly** - Displays the yearly budgets as per the current Invoice.

Color code: Red: #F15054, Yellow: #FAB43B, Green: #BED167, Dark red: #BC0F13.

Tracking Code: TC-34630

Enhancement: [EAB] Matter Budget Insights - Total matter Budget / Total matter spend / With this Invoice approved Bars

Description: Introduced the following horizontal bars in the Matter Budget Insights:

1. Total matter budget
2. Total matter spend
3. With this Invoice approved

The above titles are displayed to the left of the horizontal bar and the percentage of the data is displayed towards the right side of the bar.

The source of the data needs to be identified, extracted and loaded onto the Matter budget Insight widget towards the right end of the horizontal bar.

The system does not display the Multi Matter Invoices in Matter budget Insight widget.

Added a new Showing Budget for drop-down field with the following values:

- **All** - Displays the consolidated budget view of months, quarters & years.
- **Monthly** - Displays the monthly budgets as per the current Invoice.
- **Quarterly** - Displays the quarterly budgets as per the current Invoice.
- **Yearly** - Displays the yearly budgets as per the current Invoice.

Tracking Code: TC-34383

Enhancement: [EAB] Matter Budget Insights - Auto Refresh

Description:

When adjustments are made in the Invoice, the new number values, percentages, and bar charts are updated in the Matter Budget Insights block by Auto-refresh.

Tracking Code: TC-34965

Enhancement: [EAB] Matter Budget Insights - Error Messages

Description:

- When the user/reviewer is looking at an invoice that has more than one matter's line items in it, the system displays an error message as
"Matter Budget Insights is not available for invoices with line items from more than one matter.
Invoices with line items from more than one matter (Multi-Matter Invoices) can be automatically rejected, globally, by a TeamConnect system administrator in Setup -> Invoice Validation Rule Setting -> CSM (Validation) - Do Not Allow Multi-Matter Invoice except Line Item Projects with Specified Project Categories.
For more information, contact Mitratesch Support."**
- If user/reviewers are unable to locate a budget for the matter, the system displays an error message in the Matter Budget Insights block

"Matter Budget Insights is not available for invoices with no budget configured."

- If ANY of the line items are missing in a matter assignment, then hide the panel and display the below error message:
"Matter Budget Insights is not available for invoices which contain line items not associated with a matter."

Tracking Code: TC-34961

Enhancement: [EAB] Matter Budget Insights - Matter Details & Age, Approved Invoices & Average Monthly spend

Description: Introduced a column in the Matter Budget Insights widget to view the following data of the current invoice:

- Matter opened date: Format date by grabbing Native TC style
- Matter Age: Displays the Matter Age as zero (0) if the legal matter age is below a month.
- Average Monthly Spend: Displays the Amount approved / Number of months if Number of months = 0.

Tracking Code: TC-34628



Enhancement: [EAB] Matter Budget Insights - This Invoice amount

Description: Introduced This Invoice Amount horizontal clickable bar. The percentage data is displayed in the brackets towards the right side of the bar which has the color codes Red: #F15054, Yellow: #FAB43B, Green: #BED167, Dark red: #BC0F13.

Tracking Code: TC-34627

Enhancement: [EAB] Matter Budget Insights - With all Pending Invoices Bar

Description: Introduced With all Pending Invoices horizontal bar to view the pending invoices of the matter. The percentage data is displayed in the brackets towards the right side of the bar which has the color codes Red: #F15054, Yellow: #FAB43B, Green: #BED167, Dark red: #BC0F13.

Tracking Code: TC-34626

Enhancement: [EAB] Matter Budget Insights - Custom block

Description: Introduced a custom block to hold the following in the Matter Budget Insight widget:

- Budget associated with a particular legal matter
- All the invoices related to the same budget
- Matter Information (Matter opened on, Matter Age, Total Invoices & Average Monthly spend)
- The associated data for matter budget insight needs to be identified, extracted, and displayed in the current custom block.

Tracking Code: TC-33974

Enhancement: [EAB] - Update Matter / Vendor Labels in MBI

Description:

The following changes are implemented to improve the Matter Budget Insight depending on the drop-down value selected:

- The word Matter is highlighted when selected in the dropdown is a Matter Budget (any).
- The word Vendor is highlighted when selected in the dropdown is a Vendor Budget (any).

Tracking Code: TC-35074

4 Resolved Issues

The following list includes bugs that were resolved:

Issue: The currency shown in the Matter Invoices table, under Matter -> Invoices, shows the current value in the currency lookup table. The Total Amount is calculated based on this value. But the actual conversion rate of the invoice was determined when the invoice was posted, and may be different than what is currently in the lookup table, especially if the table is changed daily to reflect current conversion rates. The invoice currencies in the Matter Invoices list should match the individual currency conversion values of the invoices, otherwise the list and calculations are wrong.

Additional Information: The currency shown in the Matter Invoices table, under Matter -> Invoices, shows the invoice exchange rate at the time the invoice was posted and uses that invoice exchange rate to calculate the Total Amount.

Tracking Code: TESS-1522

Salesforce Case Number: 2020-0625-621304

5 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: [EAB] MBI - Matter Details - Comma formatted Average Monthly Spend

Description: This issue has been fixed by adding the comma to the Average Monthly spend as other amounts in the widget.

Tracking Code: TC-36244