

MITRATECH

InvoiceIQ 2.0 Release Notes

This release notes details the information related to Enhancements, Improvements and Resolved and Known Issues in InvoiceIQ 2.0 release.

InvoiceIQ 2.0 Release Enhancements

This release introduces a range of exciting and highly requested features aimed at enhancing the InvoiceIQ workflow for our clients:

- **New Dashboards for Vendors:** The new Enhanced vendor performance dashboard gives users a comprehensive overview of activities on which the attorneys are spending their time at the firm level. Whereas the Vendor Comparative Dashboards allow comparing the firm performance side-by-side on various factors like Diversity, Fees, Expenses, Guidelines Compliance, and Rates.
- **MitraCode Rule Projected Savings Report:** The MitraCode Rule Projected Savings Report, provides information about the InvoiceIQ module performance and potential savings in the client's environment. Gain valuable insights to optimize cost-efficiency and drive profitability.
- **Improved InvoiceIQ module Configuration and MitraCode rule settings:** This enhancement has added new fields and functionalities to provide a better user experience. Now users have the ability to restrict the application of certain MitraCode rules to specific Matter types. Additionally, users can have a predefined "Comment to Vendor" and In-House Comment added to the categorized line items automatically.

Here are the new and updated articles to deep dive into these changes:

- [Enhanced Vendor Performance dashboard](#)
- [Vendor Comparative dashboard](#)
- [MitraCode Rule Projected Savings Report](#)
- [InvoiceIQ Module Installation and Configuration V2](#)
- [InvoiceIQ Mitracode Rule Configuration](#)
- [Manage InvoiceIQ](#)
- [How to Enable Interactive Line Item on Invoice Object in TeamConnect?](#)

Enhancements/Improvements

Enhancement: Improved InvoiceIQ module Configuration and MitraCode rule settings.

Description: There are now fields such as an apply categorization field, a client-specific text field, an action on line item



field, and an adjustment type field. Furthermore, we added functionality such as a condition in the filtering field, sync details, a History tab, and considerations for MitraCode rules. For more information on InvoiceIQ module Configuration and MitraCode rule settings, refer to the [Link](#).

Tracking Code: TC-44167

Enhancement: New Vendor Comparative Dashboards

Description: Introduced Vendor Comparative Dashboard that shows the performance of a law firm compared to other selected law firm(s) with InvoiceIQ metric overviews using widgets, to see whether the diversity goals specific to the organizations are achieved or not. For more information, refer to the [Link](#).

Tracking Code: TC-44163

Enhancement: New Enhanced Vendor Performance Dashboards

Description: Introduced Enhanced Vendor Performance Dashboard that shows law firm activities for a specific firm with InvoiceIQ metric overviews using widgets. For more information, refer to the [Link](#).

Tracking Code: TC-44163

Enhancement: MitraCode Rule Projected Savings Report

Description: Introduced MitraCode Rule Projected Savings Report, so that clients can schedule reports that provide information about the InvoiceIQ module performance in the client's environment. For more information, refer to the [Link](#).

Tracking Code: TC-46297

Bug Fixes

Issue: Removed Mitratech Hosted model checkbox from the MitraCode Rule connection settings page.

Tracking Code: TC-45521

Issue: Fixed the issue in getting predictions with Modern Latin alphabets.

Tracking Code: TC-46139

Issue: Removed supervise option from MitraCode dropdown list, when the Type is set to Expense.

Tracking Code: TC-47259

Issue: Fixed MitraCode dropdown not showing the list when editing existing rules.

Tracking Code: TC-47383

Issue: Fixed the invalid error message while adding a duplicate MitraCode rule with default filter value.

Tracking Code: TC-47907

Issue: Fixed the UI issues with Rules Page.

Tracking Code: TC-47219

Issue: Fixed Issues in adding the same MitraCode with different rule types.

Tracking Code: TC-47384



Known Issues

Issue: The "Adjust To" feature of the MitraCode Rules Projected Savings report is not supported.

Tracking Code: TC-49939

