August Release

Quick Links
What's New?
Improvements

Introduction

Our last release note was back in **November 2021**. Since then, we have added several new features and improvements that you may or may not have noticed. Some of them are new and will be released soon.

Before getting into the new features and improvements detailed below, future announcements of features that we are actively developing will be announced through our **Upcoming Features** article. This article, when updated, will be announced to you via email (if you are part of our mailing list for updates).

When features are released, we will announce them via Release Notes which will be emailed to all of you (if you are part of our mailing list for updates). Release Notes will be announced after the update has gone live. If you wish to distribute this Release Note through your organization, you can now download our release notes as PDF by clicking on the attachment icon at the bottom of this article.

Starting with this Release Note, all mentioned features will be short but informative. Each feature will come along with additional Articles that will help you understand how to use the feature and where to find it. You can also search our **Knowledge Base** for additional articles if necessary or you can contact customer support for more information if you cannot find any relevant article(s).

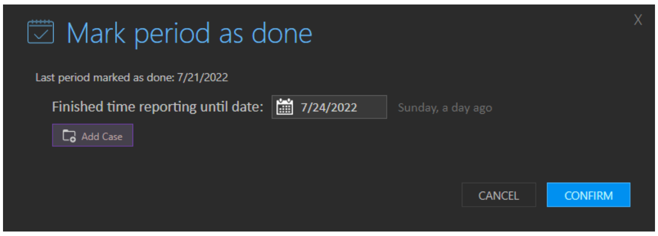
Lastly, we are currently actively developing and improving our **Knowledge Base** with articles that will help answer frequently asked questions, troubleshooting guides, and how-to guides for LEX247. It would be appreciated if you can check these articles out and provide feedback when possible.

The features mentioned below will be available **after Sunday, August 28th, 2022**.

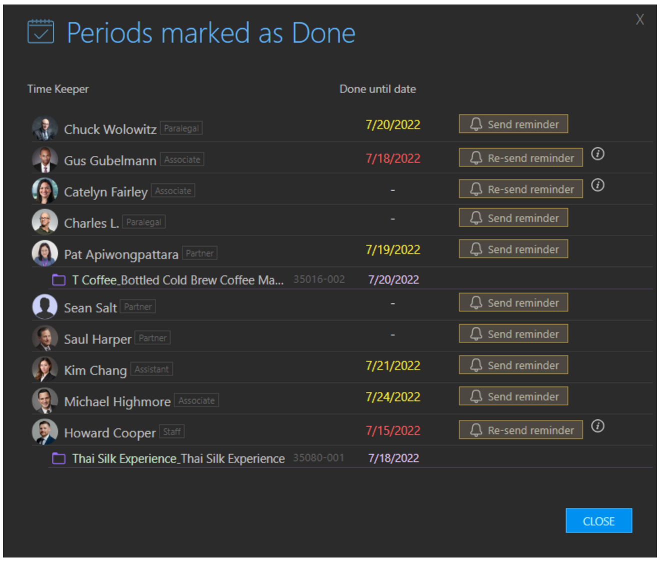
What's New?

Mark Period as Done

You can now report that you have completed time reporting for the previous period by marking the period as Done. This is available to all Users.



Users who are Client Managers, Case Managers, or a User with 'Assistant'-rights can view "done" periods. Reminders can also be sent which are sent as a notification within LEX247 that will remind Users who have not yet marked their periods as done.



Who can access it?

- All Users can mark periods as done.
- Users who are Client Managers, Case Managers, and 'Assistants' can view done periods, as well as send reminder notifications to Users.

Where can it be found?

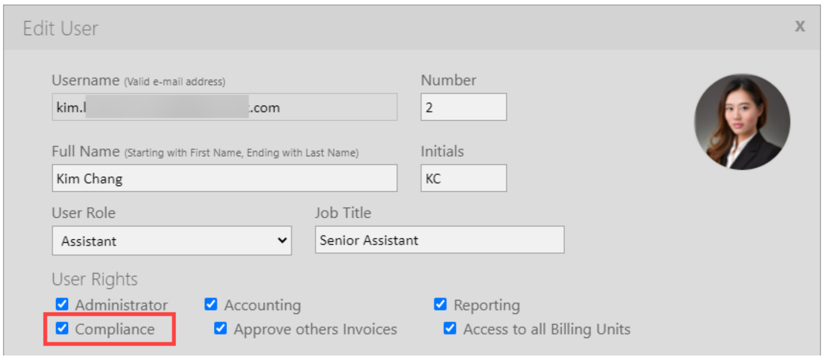
In all Time Record-views, under 'My Time' and 'Manage Time'.

Learn More

[How do I Mark a Period as Done?]
[How do I Send a Reminder to Mark a Period as Done?]
[How do I View Done Periods?]

New 'Compliance'-right

We have added a new right called "Compliance".



Users with this right can perform Anti-Money Laundering (AML) Checks on cases/clients that are marked for AML. This right has no additional rights except that Users with this right are the only Users who can start and perform AML checks on the Client Card.

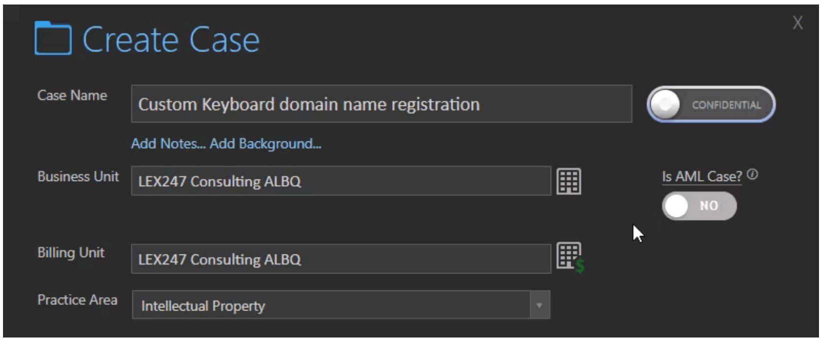
Please see the next feature (below) for more information regarding AML Checks.

Learn More
[User Roles & Rights]

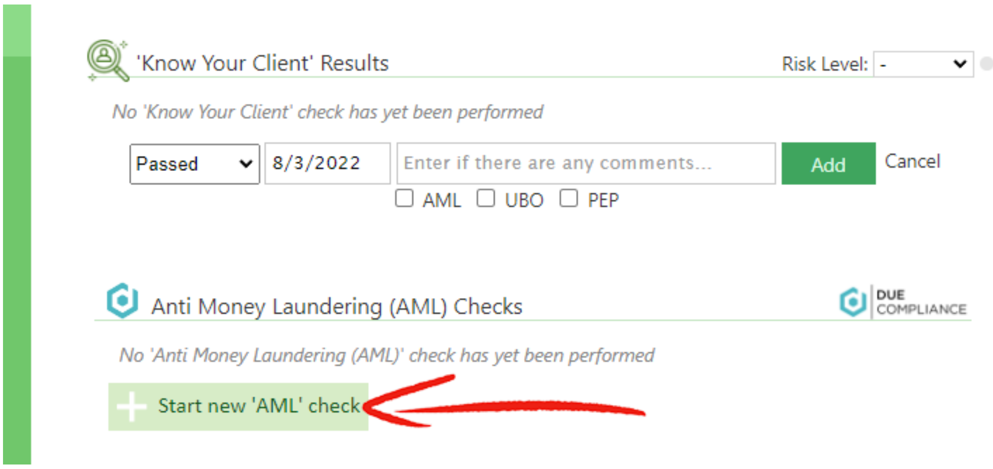
Anti-Money Laundering Check (AML) & Due Compliance Integration

You can now perform an Anti-Money Laundering (AML) Check within LEX247.

There is a new button when creating a new case, where you can select whether the case is an AML case or not.



After a case/client is created and specified as AML, as a User with 'Compliance'-right, you can start an AML Check.

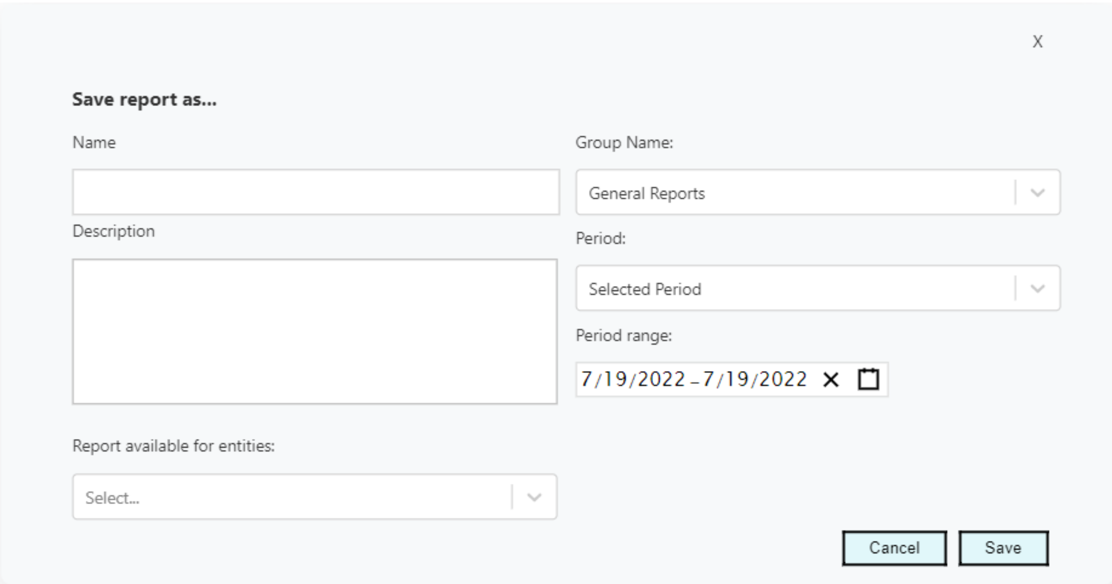


Note:
This integration requires that you are paying for the Due Compliance integration and is not part or associated with the standard, professional, or enterprise packages of LEX247.

Learn More
How do I Create an AML Case Request?
How do I Start an AML Check?
How do I Complete an AML Check?

My Reports & Shared Reports

You can now save and share reports with a specific set of filters selected.



When saving or sharing a report, you can either save it for yourself, save it with a specific set of users, with your business unit(s), or with everyone.

Who can access it?

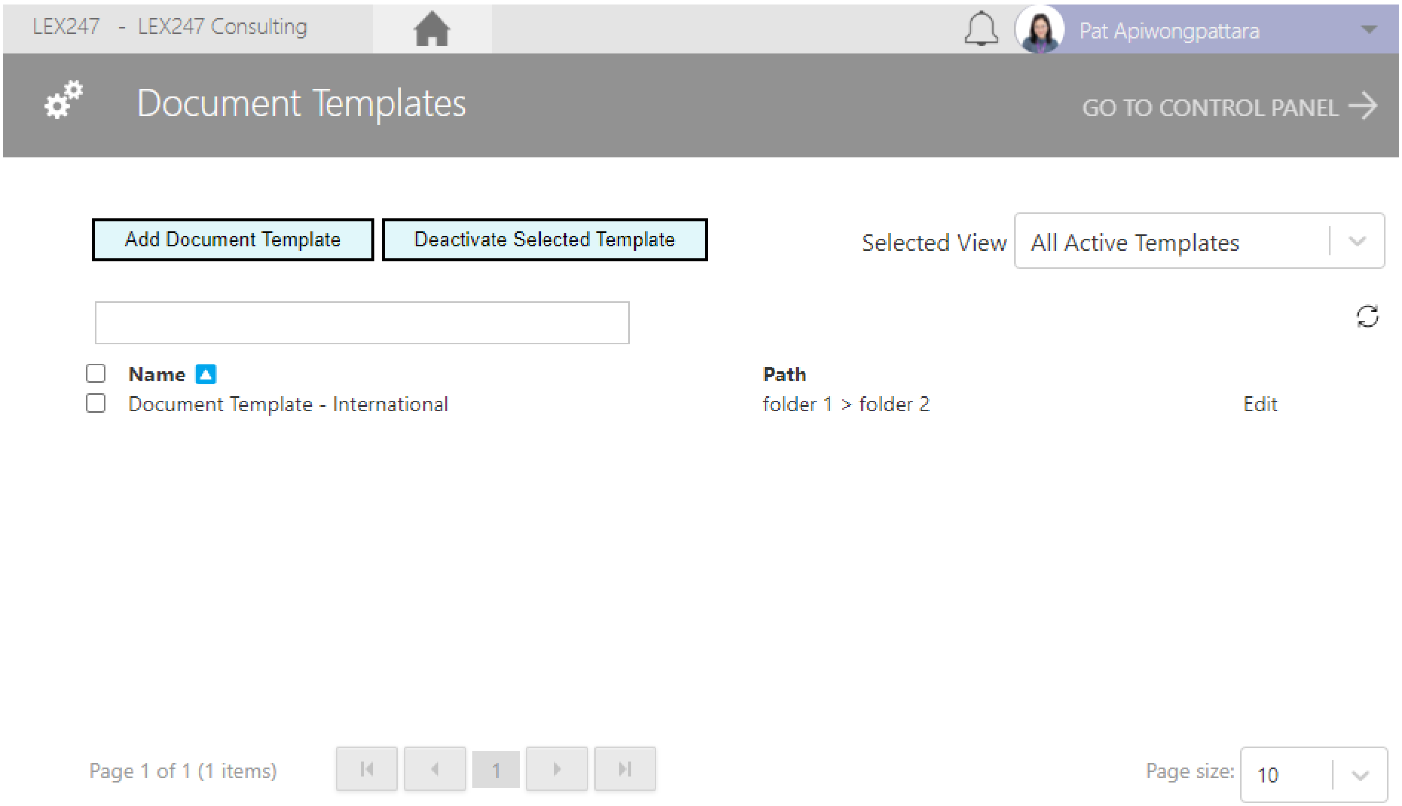
- All Users can Save reports for themselves or Share them with other specified Users.
- Only Users with 'Reporting'-right can Save/Share to Business Units or Everyone.

Where can it be found?
Reports-view, at the bottom of the filters window next to the Excel export button.

Learn More
[How do I Save a Report?]
[How do I Share a Report?]

Saving Document Templates (SharePoint)

You can now upload and save your document templates from inside the Control Panel.



Who can access it?

- Administrators can save, delete, and update document templates.
- Users with access to Case/Client Documents.

Where can it be found?

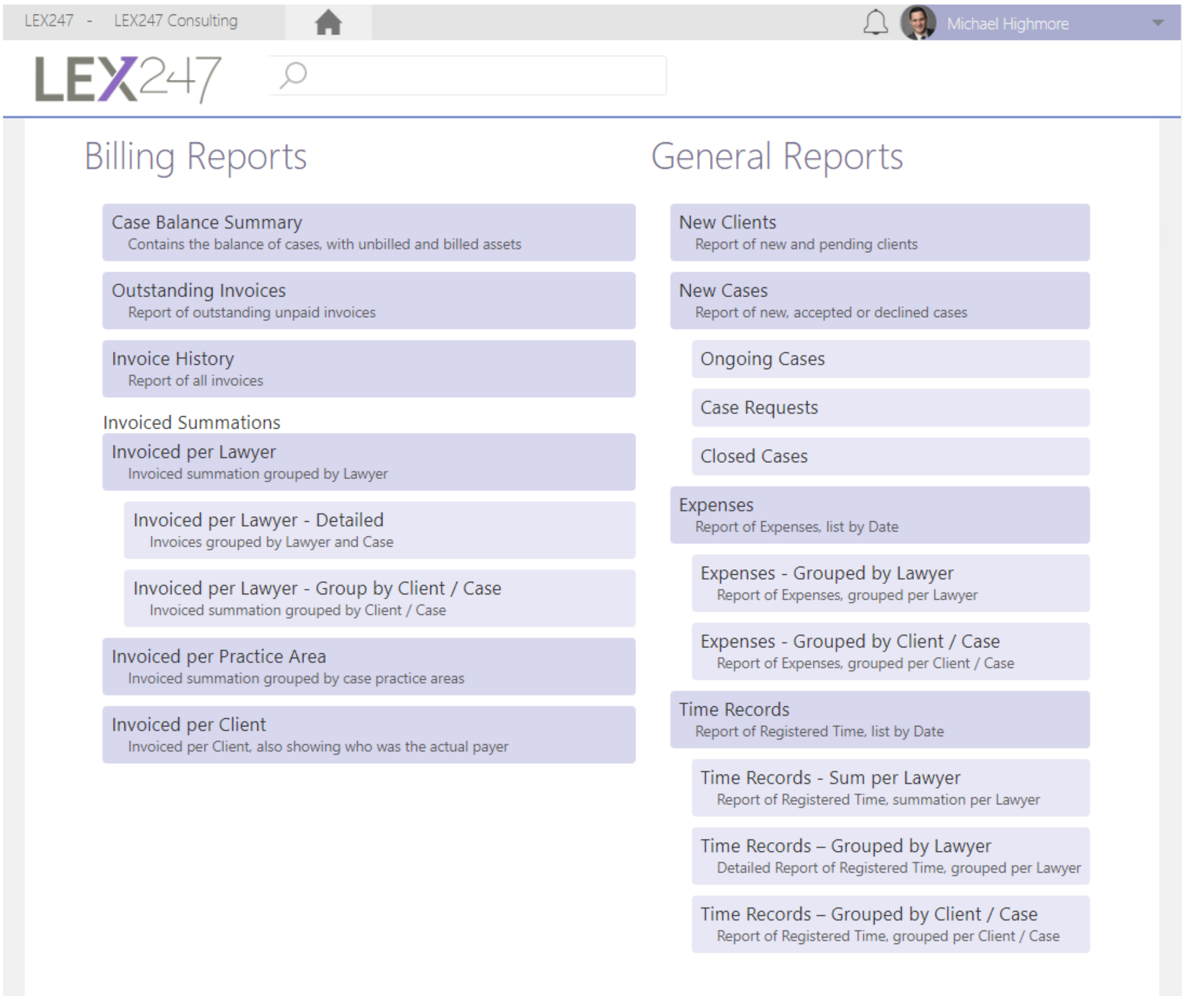
Reports-view, at the bottom of the filters window next to the Excel export button.

Learn More

[How do I Save a New Document Template?]()
[How do I Update a Document Template?]()
[How do I Deactivate a Document Template?]()

Reports for Client and Case Managers

Both Client and Case Managers (without the 'Reporting'-right) now have access to all standard reports.



When generating any of these reports as a Case or Client Manager, you will only be able to generate information on Cases and Clients that you are responsible for.

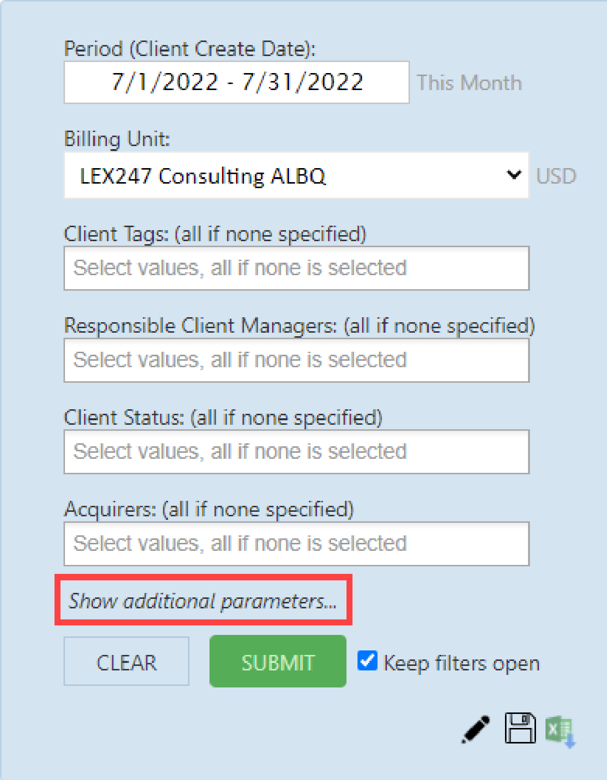
Who can access it?
Users who are either Client or Case Managers.

Where can it be found?
Reports-view.

Learn More
[Client & Case Manager Rights]
[Reports Depending on User Access Rights]

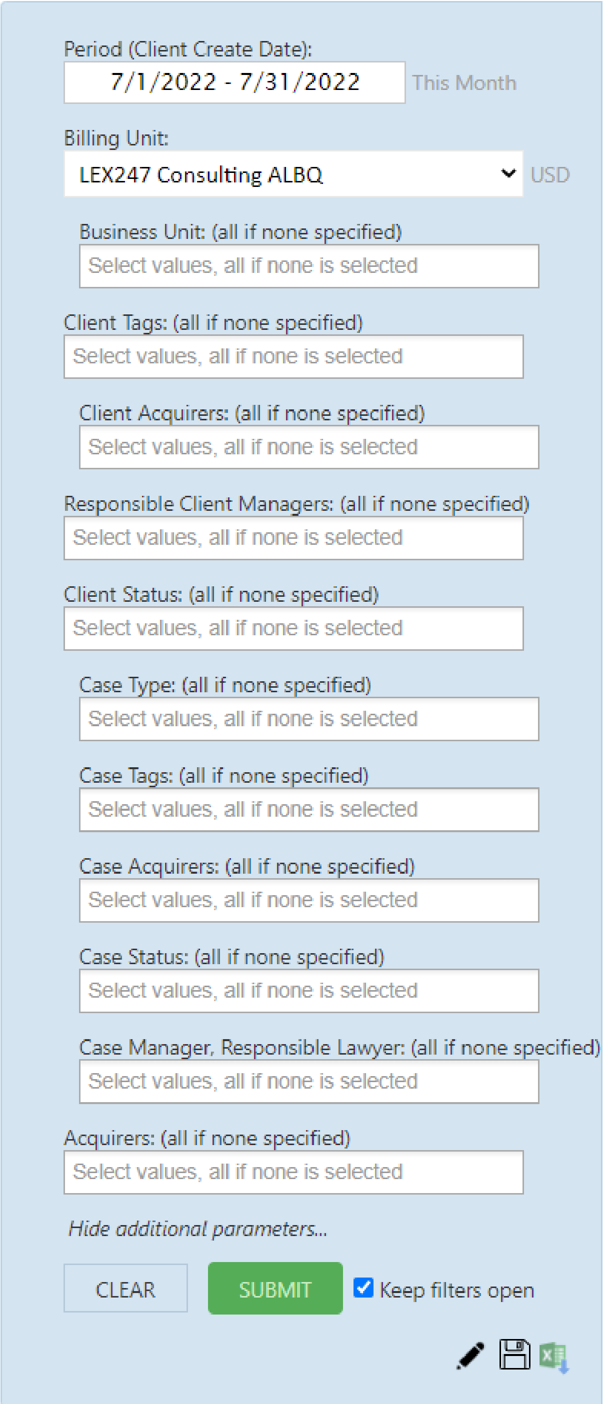
Reports: Additional Filters

All common reports now have additional filters that can be used to filter out reports further.



All existing reports have not been changed in any way. The filters that you have been using up until now have been untouched and are displayed as the main filters.

The additional filters can be seen at the bottom of the filter window. When clicked, the filter window will expand to display additional selectable filters for the report.



The extra filters are displayed "indented" so it is easily visible which are standard filters and which are additional filters.

Who can access it?
All Users.

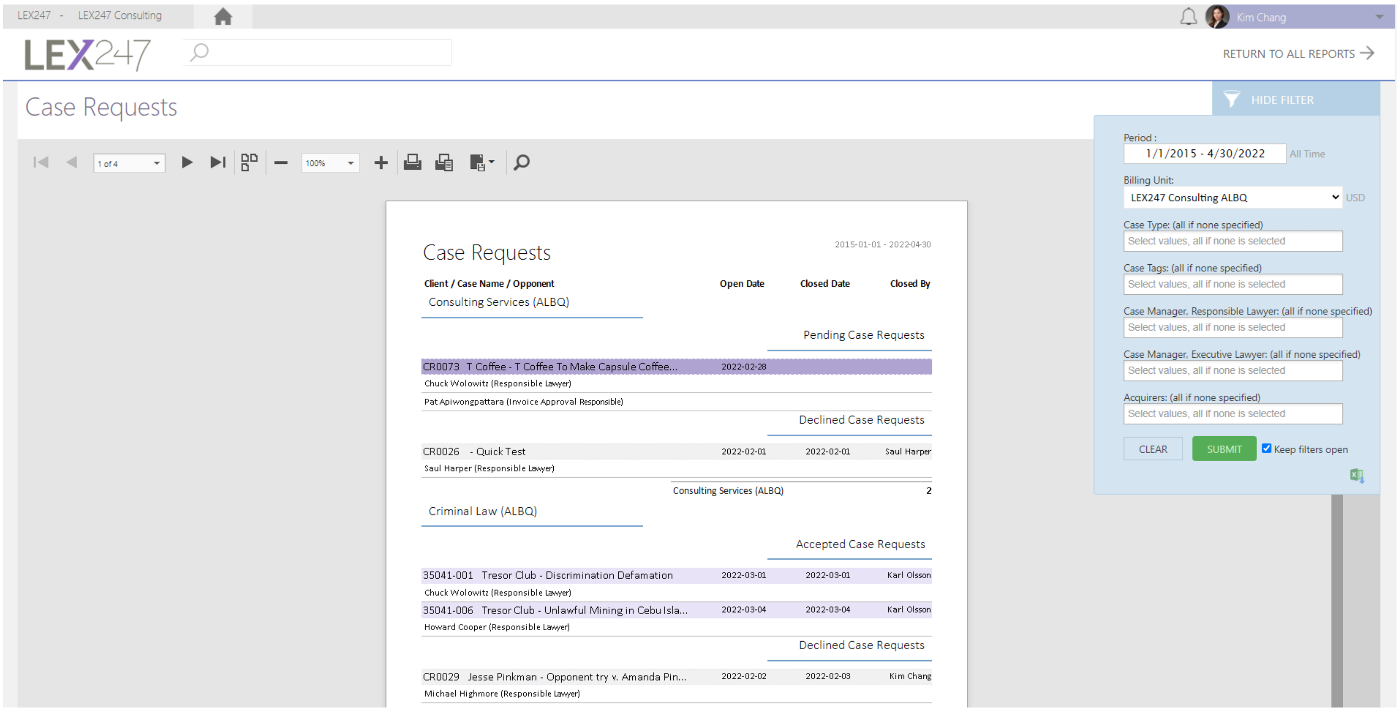
Where can it be found?
Reports-view, at the bottom of the filter window under the last standard filter.

Learn More
[List of all Report Filters]
[Report Articles]

Release Notes – LEX247
Published Date: 2022-09-19
Version: 1

Standard Report: Case Requests

A new common report has been added under General Reports.



This report shows a list of all Pending, Accepted, and Declined Case Requests within the selected period. It can be used to see the number of Case Requests created within a period, and how many of them were Accepted, Declined, and Pending.

Who can access it?
Case Managers, Clients Managers, and Users with 'Reporting'-right.

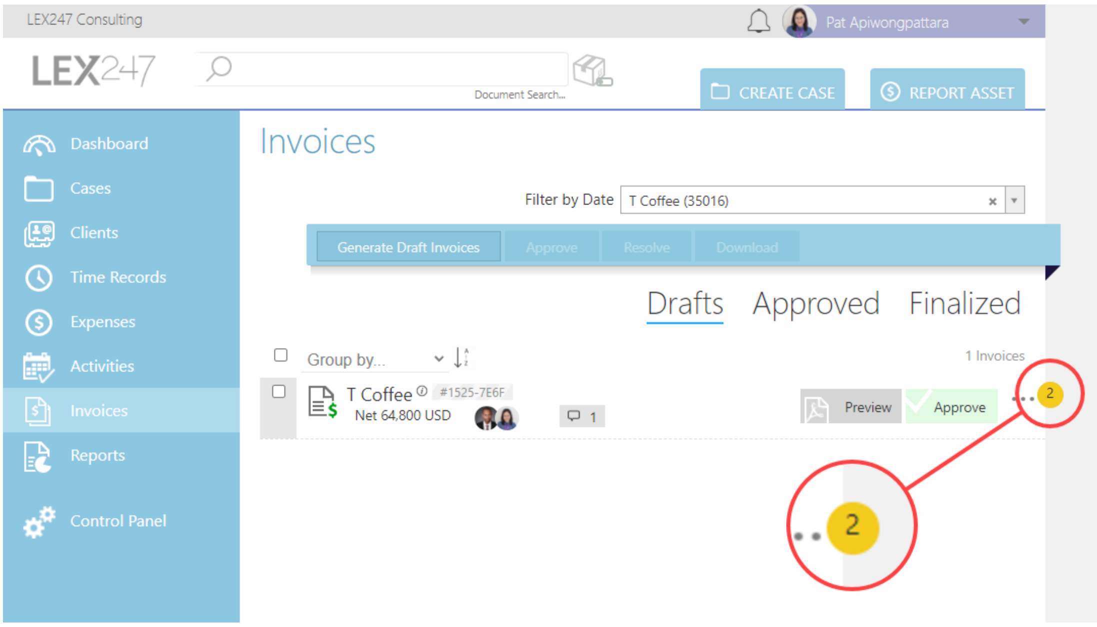
Where can it be found?
Reports-view, at the bottom of the filters window under the last standard filter.

Learn More
[Case Request]

Improvements

Invoicing: New Asset Indication Icon

You can now see a new indication icon on invoices if there are newly registered assets within the selected period.



This change is introduced to increase productivity as previously you had to open the invoice to see if new assets have been registered since invoice generation.

Who can access it?
Users with access to Invoices.

Where can it be found?
All Invoices-view.

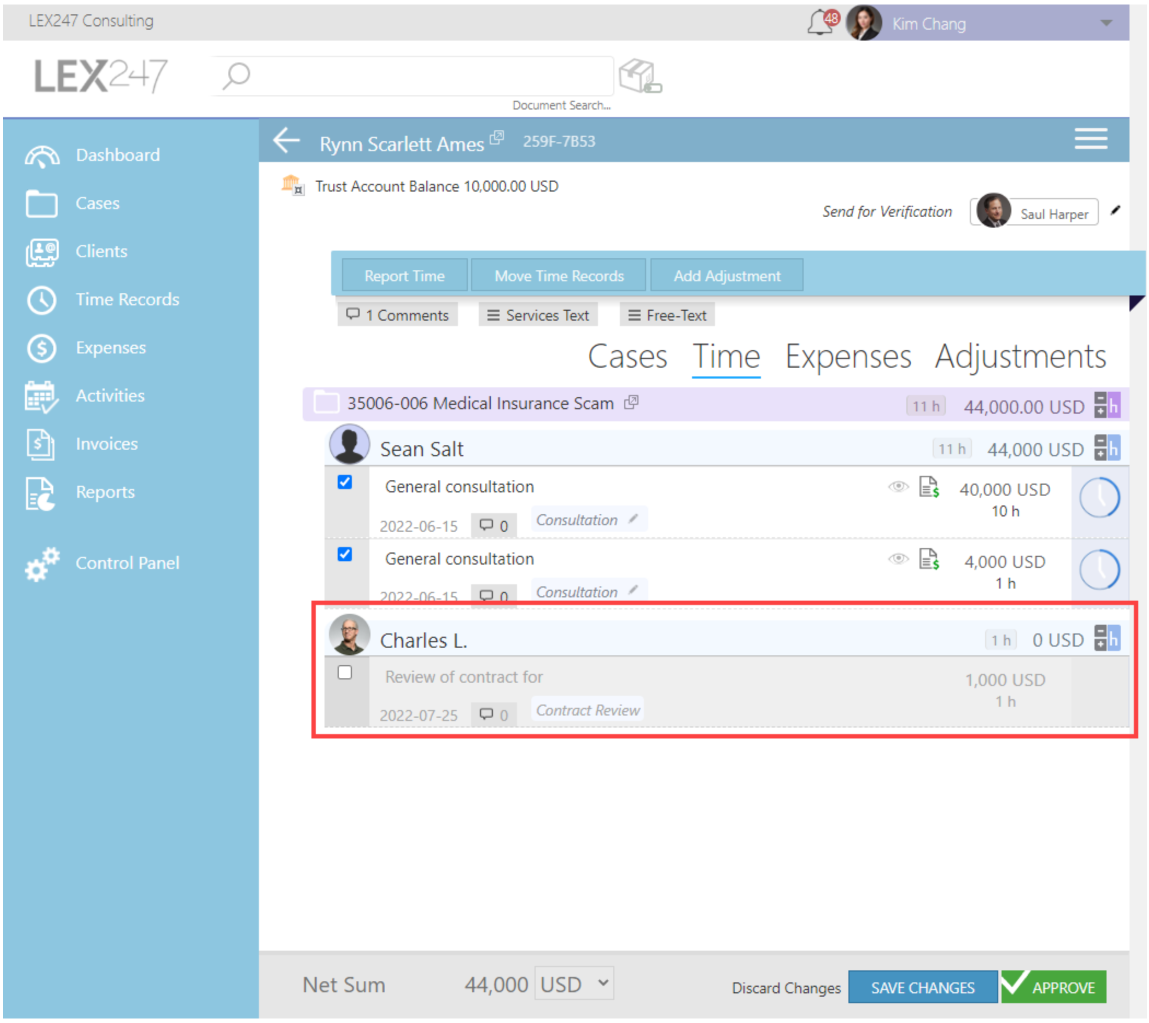
Learn More
[How do I View If there are more Assets Registered within a period?](#)

Release Notes – LEX247
Published Date: 2022-09-19
Version: 1

Invoicing: Adding 'Registered' Time Records to Draft

Prerequisite Settings:
A Billing Unit that has the setting "Auto Approve Time Records/Expenses when Generating Invoices" is set.

As a User with invoice editing rights, if assets have been registered (and not approved) after an invoice has been generated, you can now see and add those assets to the invoice.



The assets will appear greyed out.

Previously, with the setting, you were required to approve the assets first before they became visible in the draft invoice to be added manually.

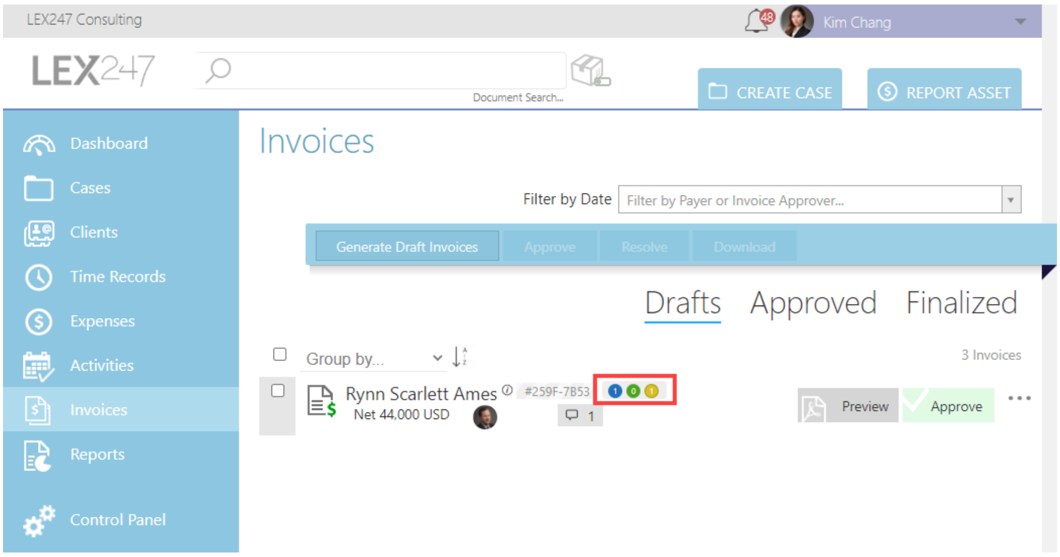
Who can access it?
Case Managers, Clients Managers, and Users with 'Reporting'

Where can it be found?
Control Panel > General > Manage Integrations

Learn More
[How do I Add a Registered Time Record to an Invoice?]
[How do I Add a Registered Expense to an Invoice?]

Invoicing: Verification Status

When sending invoices for verification, you can now see the same verification icons from the invoices-list.



The function works the same way as the verification icons inside the draft invoice, where you can hover over each colour and view additional information.

This is introduced to increase productivity, as previously you had to open the invoice to view the Verification status.

Who can access it?
Case Managers, Clients Managers, and Users with 'Reporting'

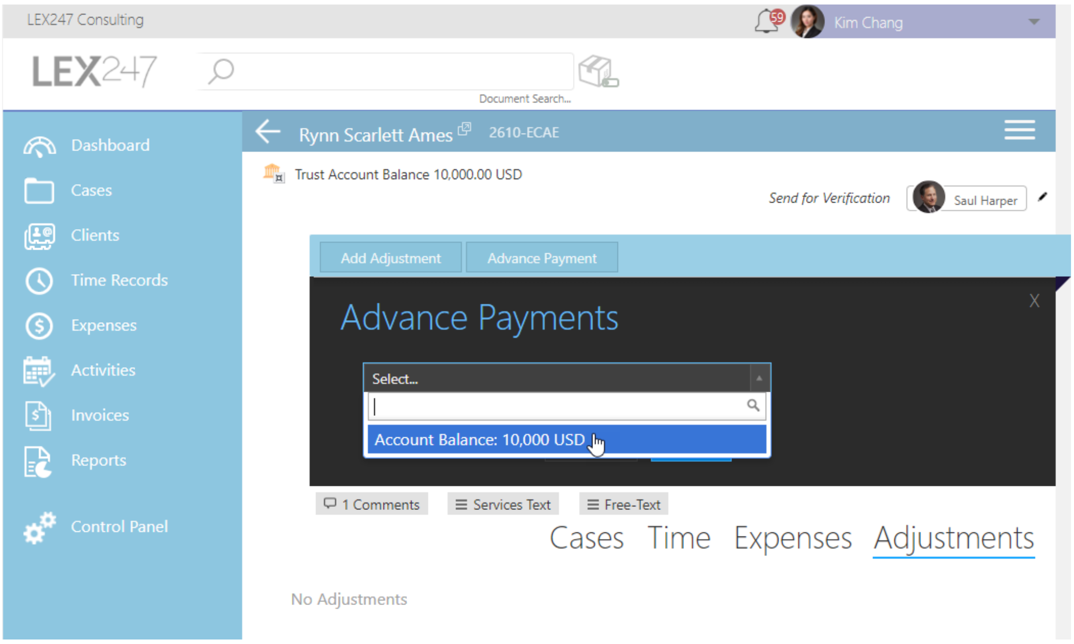
Where can it be found?
Control Panel > General > Manage Integrations

Learn More
[How do I View Verification Status for Invoices?]()
[Verification Workflow]()

Release Notes – LEX247
Published Date: 2022-09-19
Version: 1

Invoicing: Using Advanced Payment Balance

After invoice generation, you can now explicitly use (if available) any advanced payment balance to the invoice. You can select more than one advanced payment if desired.



This change is introduced to provide Users with access to draft invoices and the flexibility to add or remove advanced payment balances for any reason.

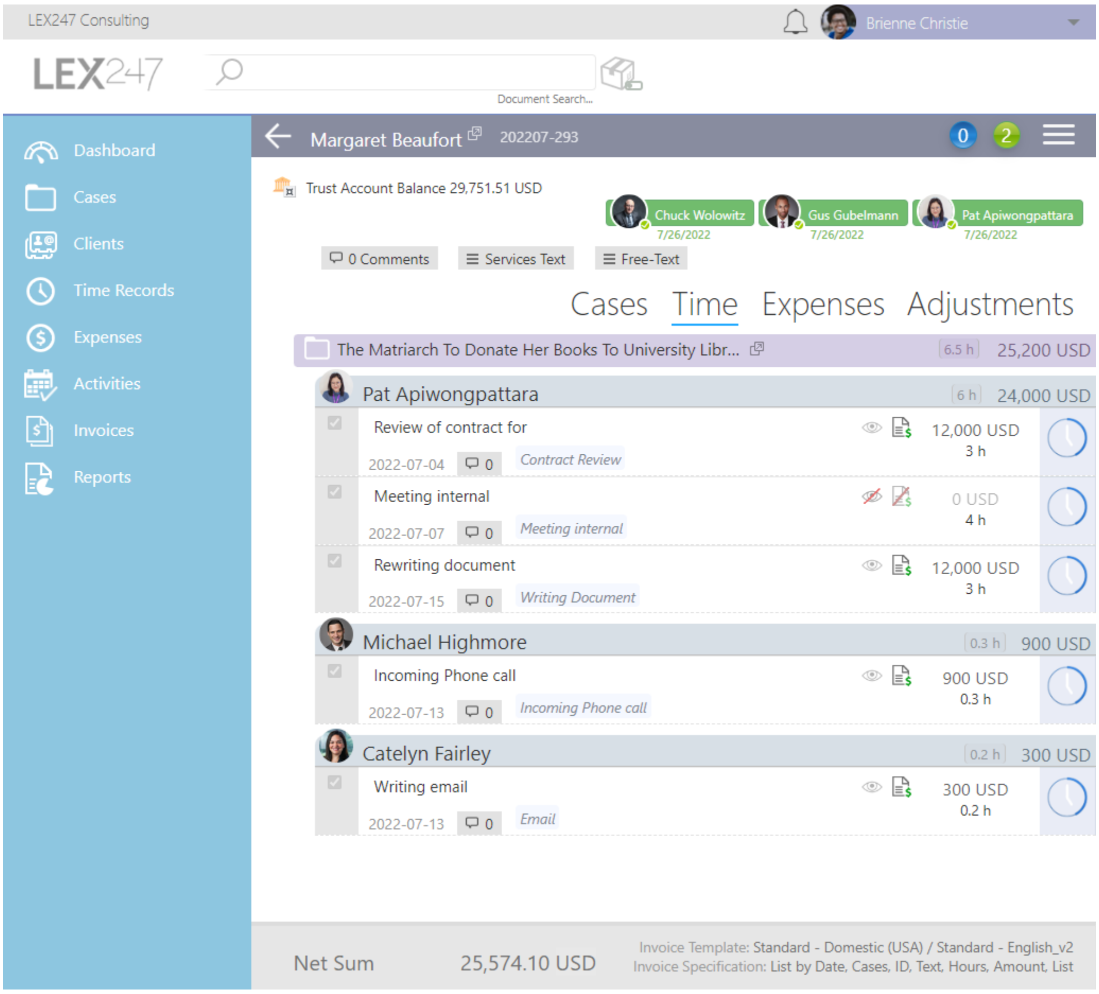
Who can access it?
Users with access to Invoices.

Where can it be found?
Draft Invoices > Adjustments tab

Learn More
[How do I Add Advanced Payment on an Invoice?]

Assets Within Credited Finalised Invoices

You can now view assets that were inside an Invoice that has been credited.



Previously this was not possible due to how we handle assets (time records and expenses) within LEX247. However, we have now managed to find a solution where you can view these assets as 'read-only'.

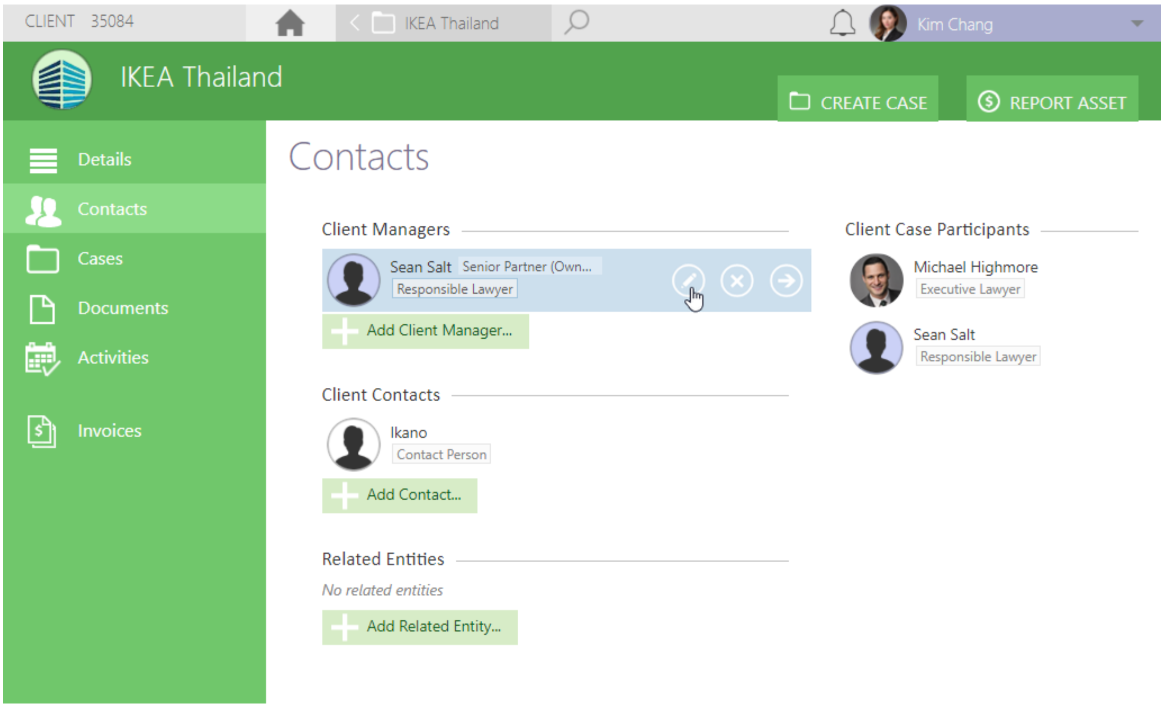
Who can access it?
Users with access to Invoices

Where can it be found?
Invoices-view > Any invoice that has been credited.

Learn More
[How do I View an Invoice that has been Credited?]

Changing Client Manager(s) Role(s)

You can now edit/change a Client Manager's role directly from the Client Card, Contacts-view.



This is to increase productivity. In the previous method, you had to add a new Client Manager, remove the Client Manager you wanted to edit, and add them back with the correct role(s).

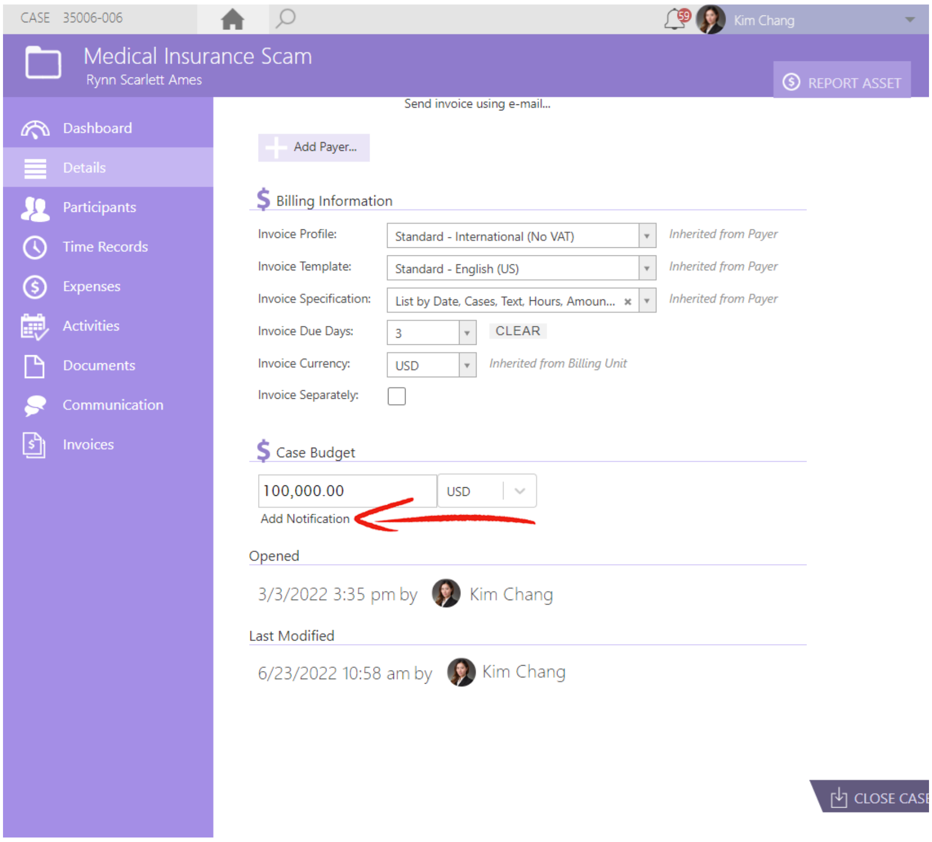
Who can access it?
Client Managers

Where can it be found?
Client Card > Contacts-view

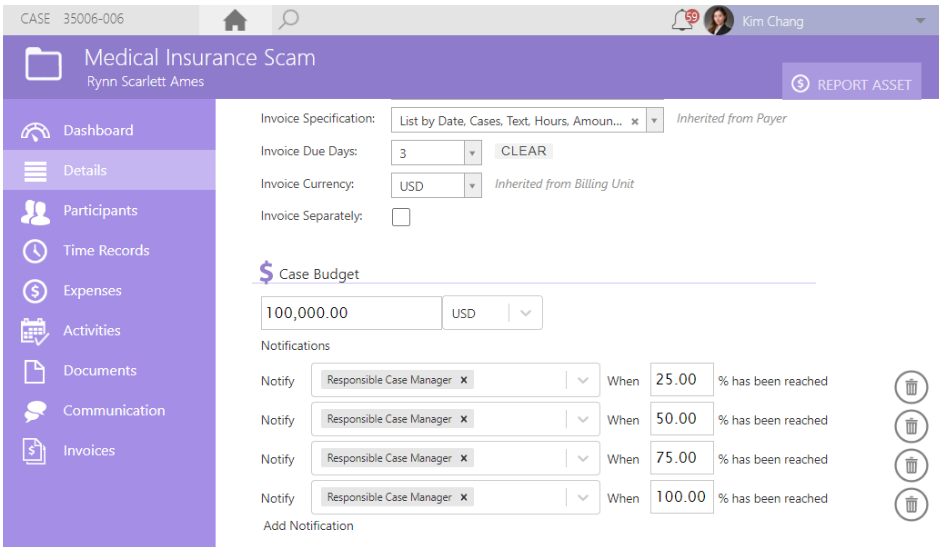
Learn More
[How to Update a Client Managers Role?]

Case Budget: Notifications Presets

With the Case Budget notifications, if you are always inputting the same values for every case, you can now define this preset to us and we will set it up for you.



When clicking on **Add Notification**, your preset notification settings will automatically be filled in.



Please email support@lex247.com with the preset notification budget settings you wish to have.

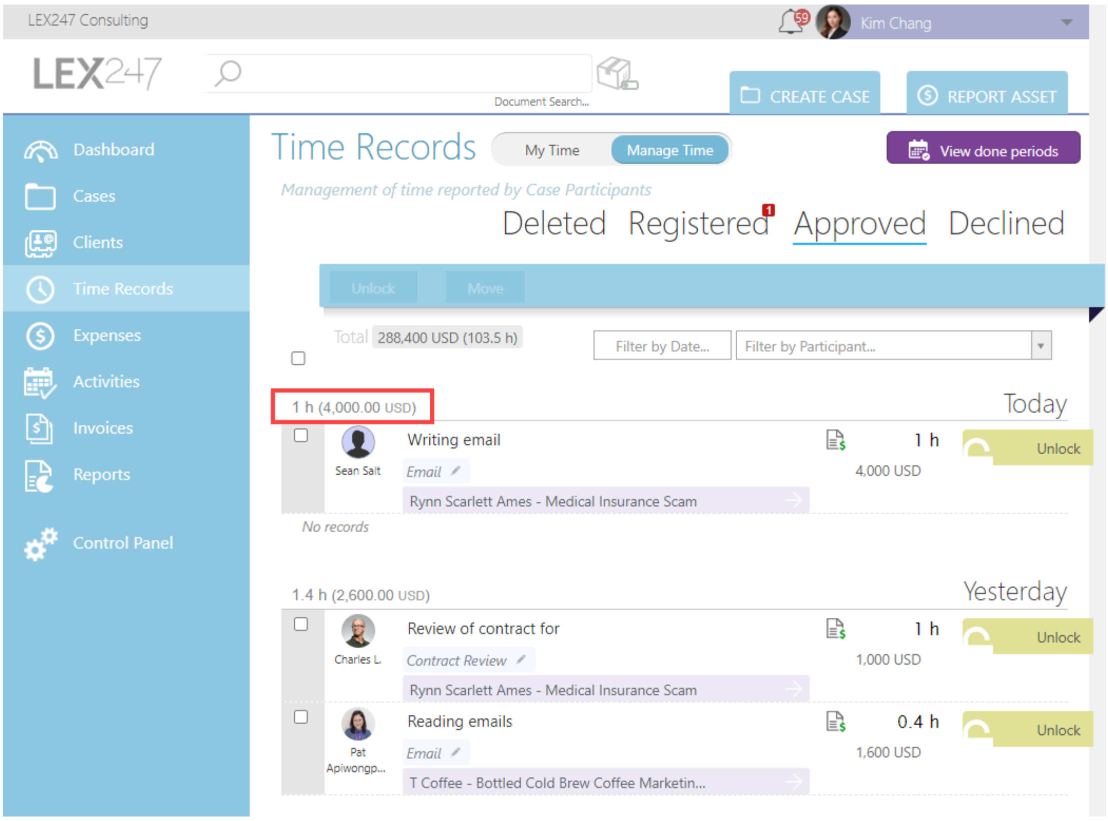
Who can access it?
Client Managers, Case Managers, and 'Assistants'.

Where can it be found?
Case Card > Details-view

Learn More
How to Add a Case Budget Notification

Time Records - Daily Sums

From the Time Records-view, you can now see the total hourly and monetary values per day.



This change is introduced to increase productivity, as previously you had to take out reports daily to find the hours spent and the value of those hours.

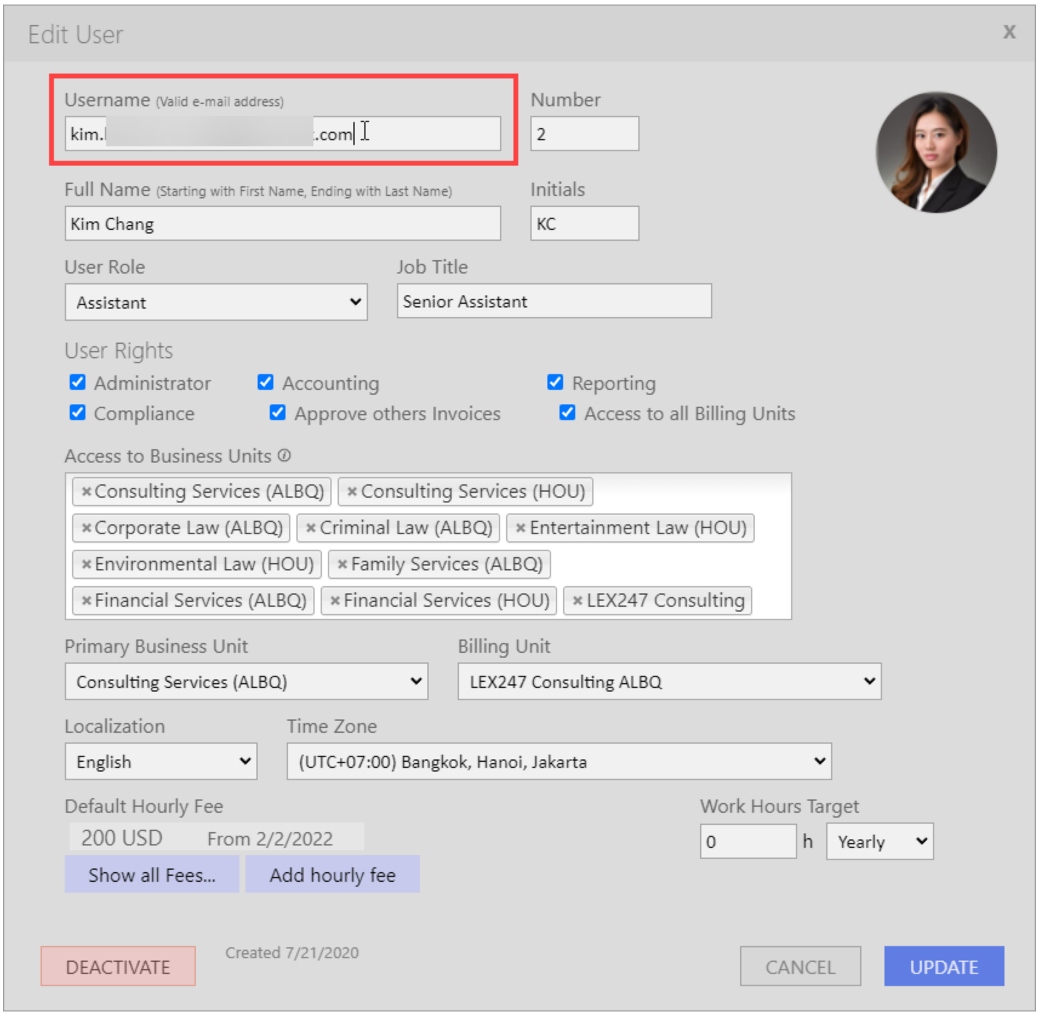
Who can access it?
All Users

Where can it be found?
All Time Records-view > 'My Time' or 'Manage Time'

Learn More
[How do I View how many Hours were registered today?]()

Changing User's Username (Email)

You can now edit a Users Username (email) in the Control Panel.



This change was made due to spelling mistakes/changes that occur inside AzureAD. This change is introduced to remove the dependency from LEX247 technical support.

Who can access it?

Users with 'Administrators'-right.

Where can it be found?

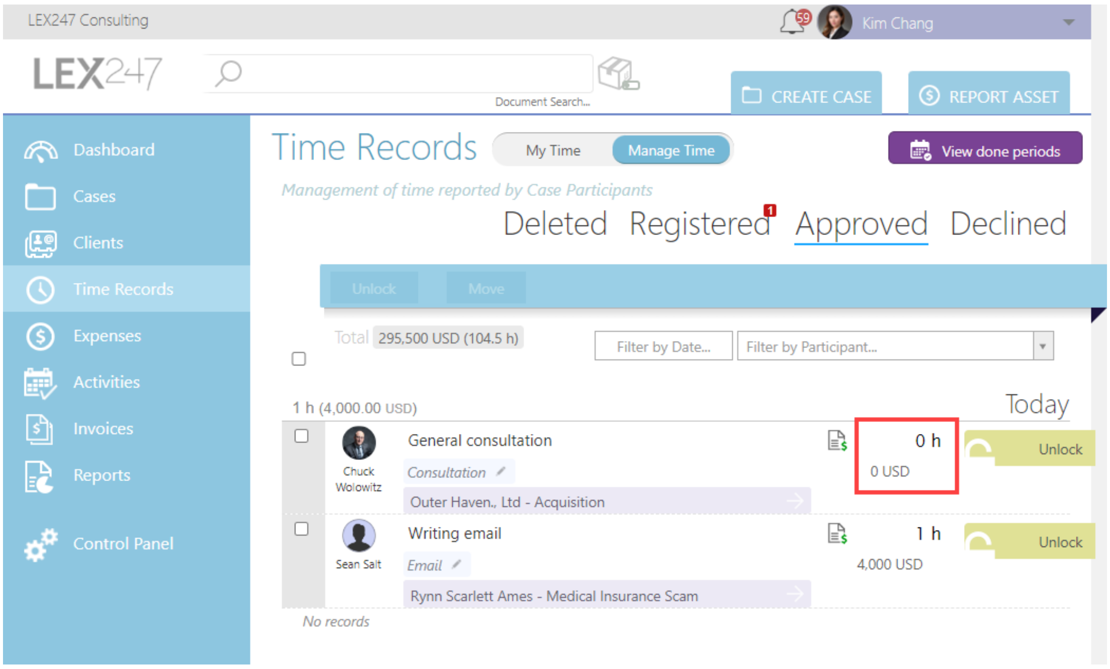
Control Panel > Organisation > Manage users > Edit User

Learn More

[How do I Edit a Users Username (E-mail)?]

Reporting 0 Hours

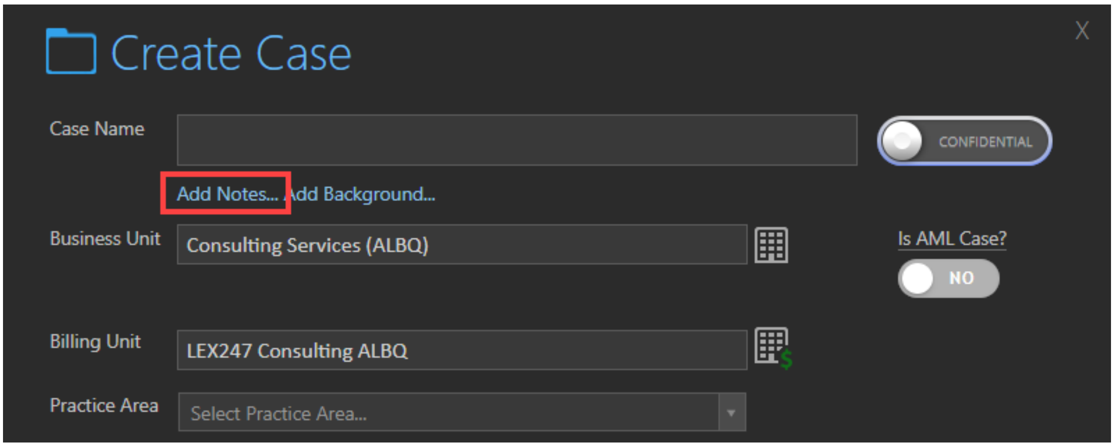
You are now able to report time records for 0 hours.



This change was implemented to allow flexibility with reporting time for various purposes.

Case Creation: Case Notes

When creating a case, you can now add case notes right from the case creation dialogue.



This was added to allow adding relevant information during case creation more conveniently. Previously, you had to create the case or case request and then open it before you could add any case notes.

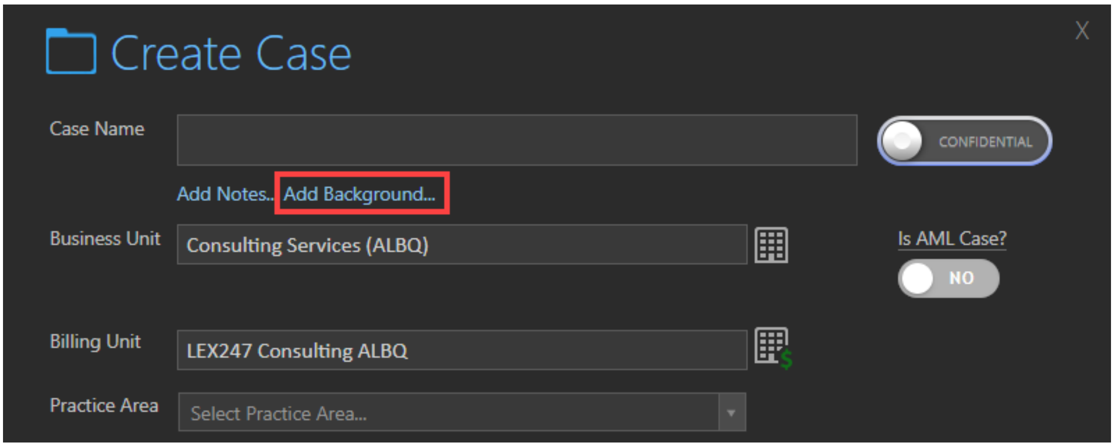
Who can access it?
All Users who can create Cases or Case Requests

Where can it be found?
All Case Creation Dialogues

Learn More
[How do I Add a Case Note when Creating a Case?]

Case Creation: Case Background

When creating a case, you can now add a case description right from the case creation dialogue.



This was added to allow adding relevant information during case creation more conveniently. Previously, you had to create the case or case request and then open it before you could add any case background.

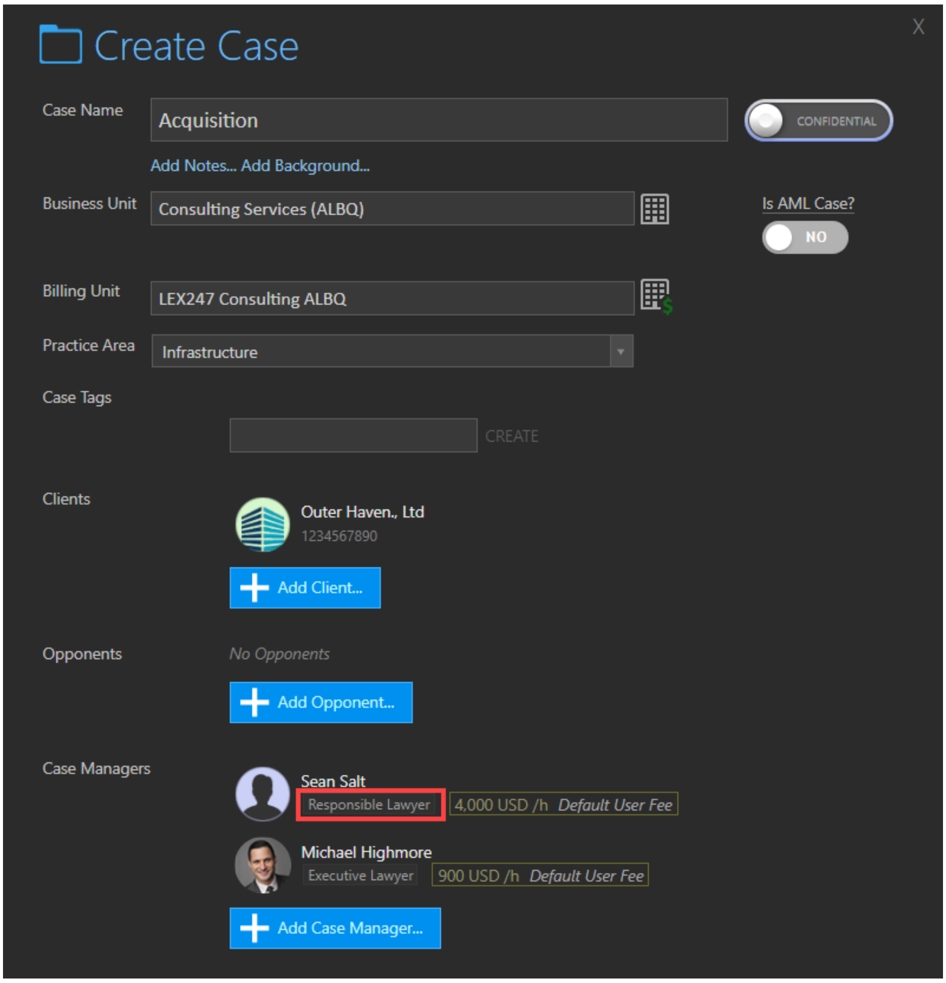
Who can access it?
All Users who can create Cases or Case Requests

Where can it be found?
All Case Creation Dialogues

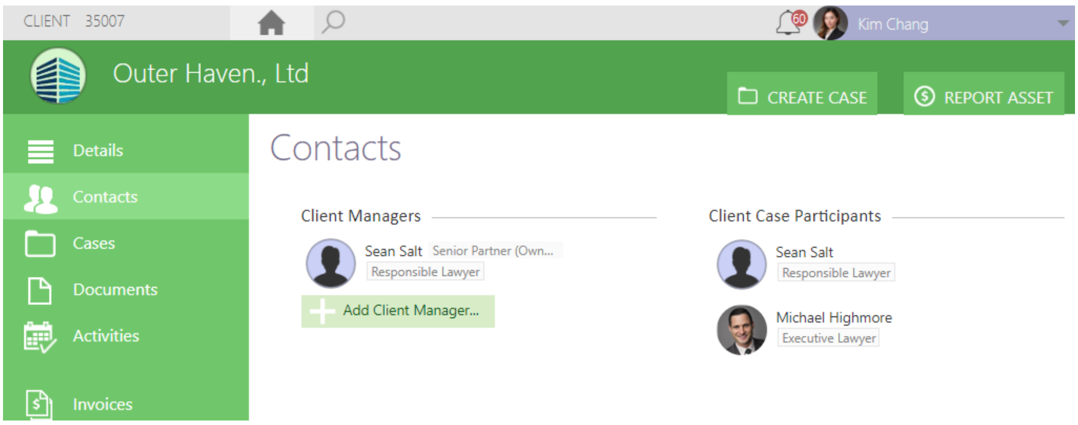
Learn More
[How do I Add a Case Background when Creating a Case?]()

Case Creation: Automatically set Responsible Case Manager as Client Manager

When creating a new case (not a case request) with a new client, all Case Managers with the 'Responsible Lawyer'-role will automatically be added as the Client Manager(s) for the new Client upon creation.



In the example above, Sean is set as 'Responsible Lawyer' while Michael is set as 'Executive Lawyer'. Upon case creation, the Client Manager will be Sean as he has the 'Responsible Lawyer'-tag set.



The current behaviour is that all specified Users added as Case Managers in the Case Creation Dialogue are added as Client Managers. This remains unchanged and the default configuration.

If you wish to have this configuration where Case Managers with the 'Responsible Lawyer'-role are added as Client Managers automatically, please email **support@lex247.com** your request.

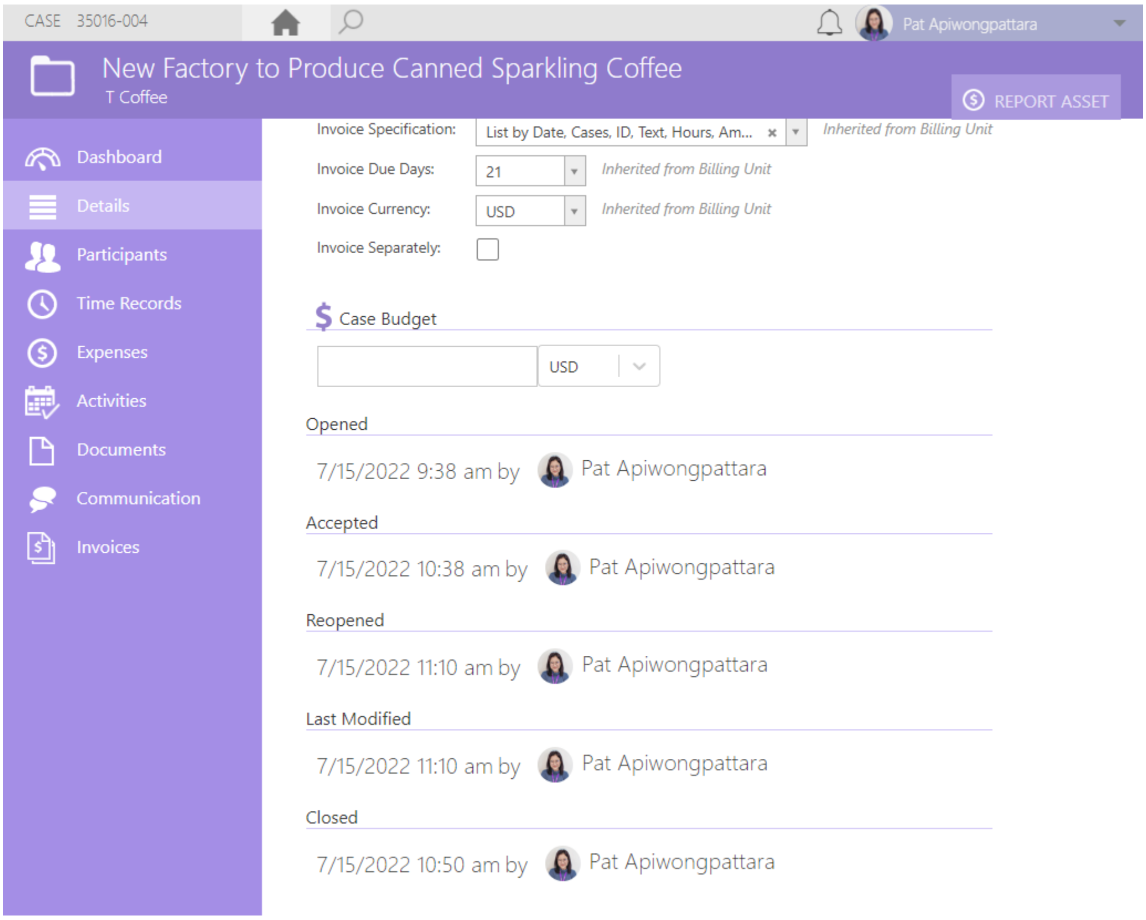
Who can access it?
All Users who can Create a Case.

Where can it be found?
All Case Creation Dialogues.

Learn More
How do I Set a Client Manager for a New Client when Creating a Case?

Case Details: Created, Declined/Accepted, Reopened, Closed and Modified

You can new view more information on cases when they have been created, declined or accepted, closed, reopened, and last modified.



This change is introduced to provide more details to the User. As previously you could only see when the cases were Opened, Accepted and Modified.

Who can access it?
All Users with access to the Case

Where can it be found?
Case Card > Details-view

Learn More
[How do I View when a Case has been Declined?]
[How do I View when a Case has been Closed?]
[How do I View when a Case has been Reopened?]

Creating New Entities

When creating new entities (clients, opponents, related entities etc), we have improved the search so that you can search using either name or entity number (if available).

This change is introduced to avoid creating duplicates of the same entity.

Who can access it?
All Users

Where can it be found?
All Cards where you can create any of the following;

- Creating New Contact
- Creating New Related Entity
- Creating New Related Company
- Creating New Client Payer
- Creating New Case Payer
- Creating New Case Client
- Creating New Case Opponent
- Creating New Case Participant