Release Notes – 9.6

Hello Centerbase Family!

Ghouls and goblins, witches and vampires – we here at Centerbase have managed to avoid the monsters of Halloween long enough to get Release 9.6 out to you. Fear not – no hauntings here, just a bunch of bug fixes and some new feature work to improve your Centerbase experience. We'd love to know what you think so take a look and let us know!

Billing & Accounting

- ***Upload attachments to a bill or journal entry:*** You asked and we listened—users can now attach receipts and documents to expense entries on bills, and journal entries! Additionally, a threshold can be set within the client-level billing settings, at which point an attachment is required to document the expense. Stay tuned for our next release, where we'll give you the ability to show the attachment with the web copy, download it to a PDF copy of the bill and download it with LEDES.
- Added the ability to have preset filters on the posted bills page.
- Users can choose to apply a negative bill to the client so that the credit can be used in a different matter for the same client.
- Fixed an issue where Trust Payments were showing up twice on bills.
- Made changes to improve the loading speed of pre-bills in pre-bill approval.

Calendar

- Fixed an issue where recurrence settings did not always set to default when creating repeating appointments
- Resolved an issue where punctuation marks in appointment names were sometimes sent as HTML code when pushed to Outlook.

Conflict Check

- Fixed an issue where certain special characters would cut off remaining search terms in the Conflict Check Excel export.

Document Management

- Fixed an issue where if you used mass edit on documents to set "Share with Portal" to true then you could not open the share with portal dialog from that document anymore. Now it will default information that is missing when opening the dialog.

Email

- Fixed an issue where sending bulk emails sometimes errored out.

Practice Management

- Fixed an issue where setting a default query with a wildcard date filter would not update to the new relative dates on the load.

Reports

- Resolved an issue where users sometime received an error when trying to report on Billing Code Name.
- Created an updated XML for the Aged WIP by Matter report to allow filtering by pre-bills, unbilled or both.
- Fixed a bug where the wildcard date on the timer entries approval page would not update the date range when returning to the page.

Timekeeping

- Added an option to System Settings > Pre-Bill Approval under "Enable Users to Edit Line Item Totals" to have options when changing the total to change the billable hours or the billable rate. Previously it always changed the billable hours.

- Updated the unbilled entries tab of ePreBill approval to show all unbilled entries, both time and expense, and not just time entries.

UI/UX

- Addressed an issue where HTML code sometimes showed in place of punctuation marks.
- The Journal Entry is now saved when the user clicks on the expense allocation checkbox, saving the user from having to make extra clicks to save.

Payments

- Fixed an issue that could cause an error when creating a payment.
- Addressed an issue that prevented withdrawals from Centerbase Payments when certain conditions were met.

Practice Management

- Fixed an issue with formula fields where text info in root field could cause the formula to fail. Now if a root field for a formula has text it will be treated as 0 or blank based on field settings for blank filed.

Timekeeping

- Fixed an issue where updating a time entry with an active timer could trigger the rounding settings and advance the timer to the next rounded point.
- Fixed an issue where billable hours could not be set to 1 when marking a billing entry as "is flat rate" if "show billable hours" is off.