



Release Notes

Update: v2.15.1

Windows Case Management App

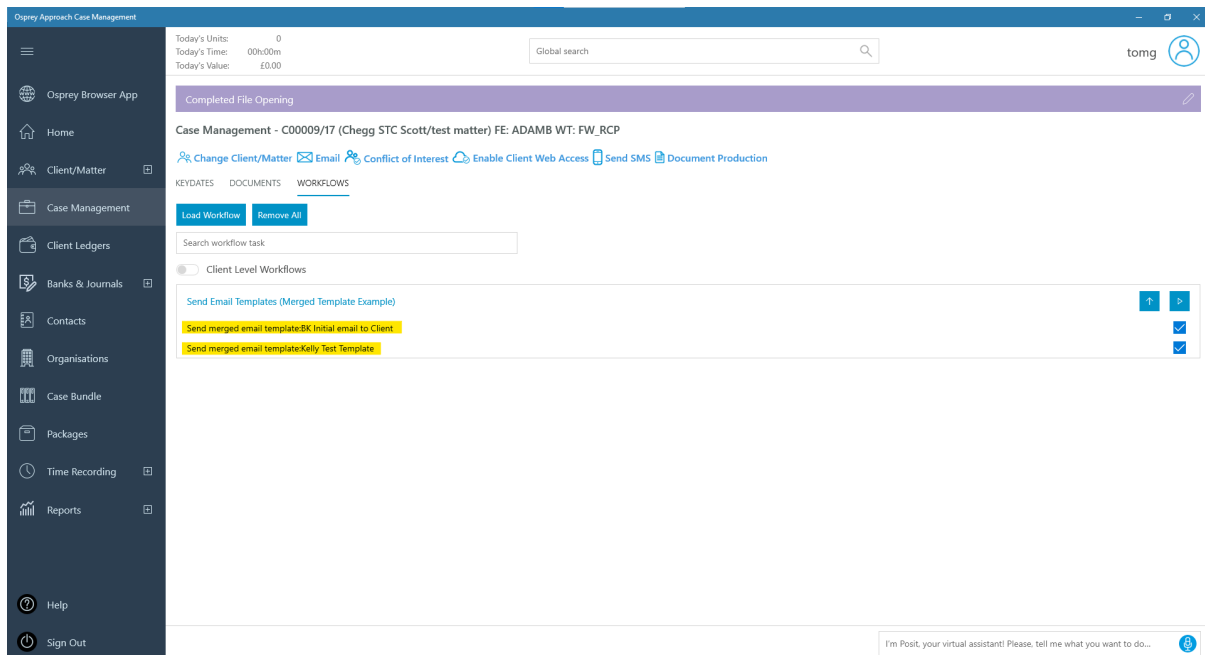
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Multiple 'merged email template' actions in workflows

Previously, if two "Send merged email template" actions were concurrent in a workflow task, the second action would not run.

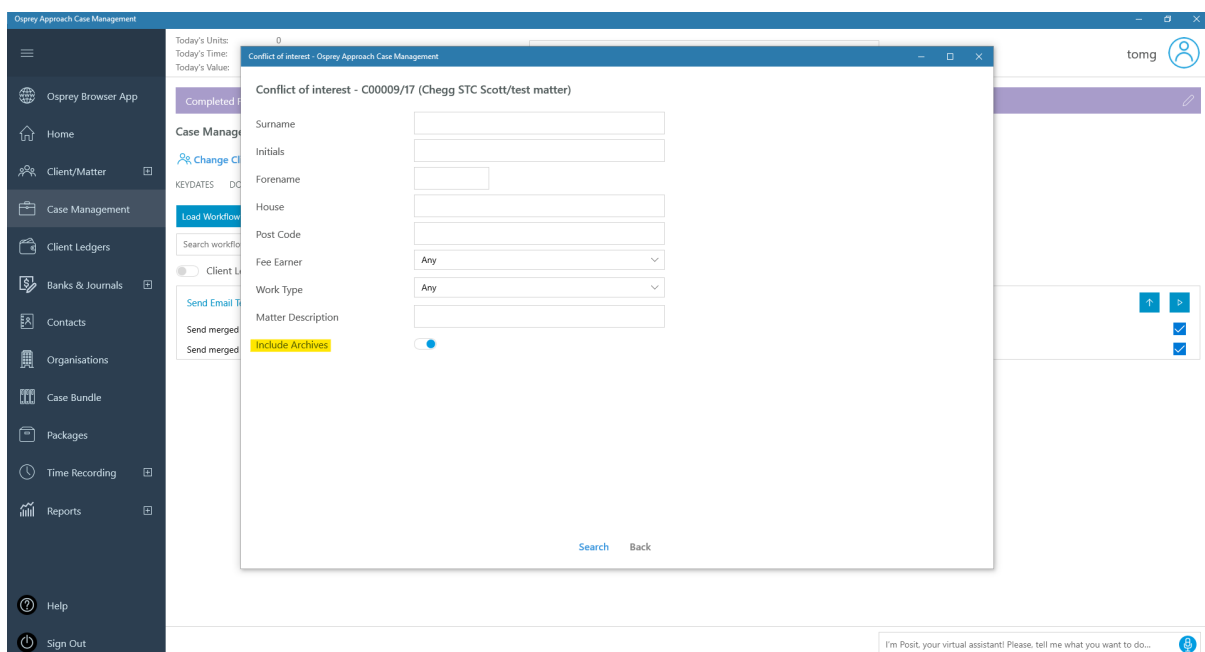
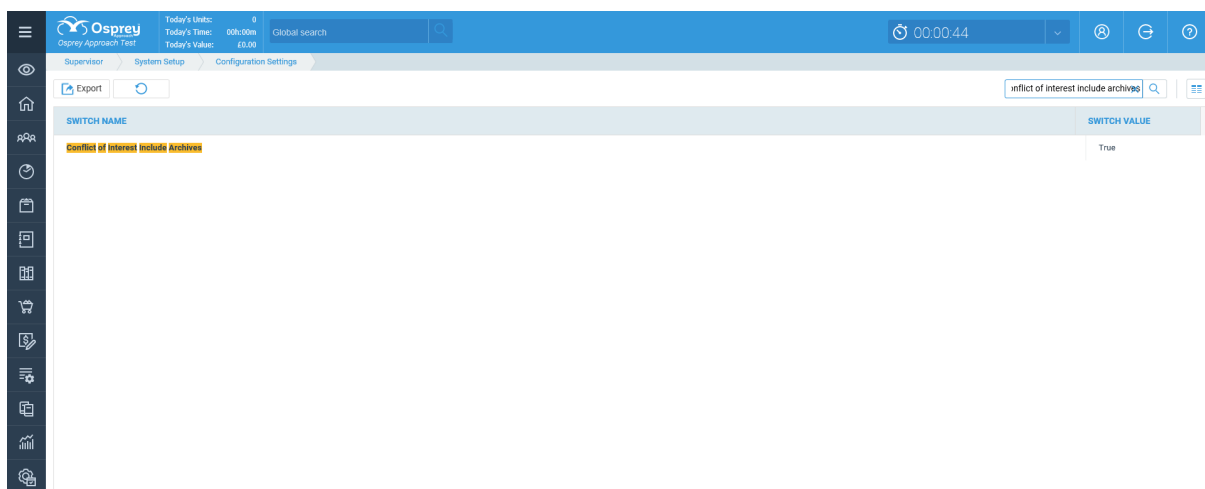
This has now been fixed, so users can have as many "Send merged email template" actions running concurrently, as they like.



Include archive when performing conflict check

Previously, if the client site was set to include archive clients as default, this was not pulling through when running conflict of interest checks, meaning that clients had to remember to turn the switch on.

This has now been fixed, so that the setting applied to the site in Supervisor > System Setup > Configuration Settings pulls through to the app.



SMS matter number

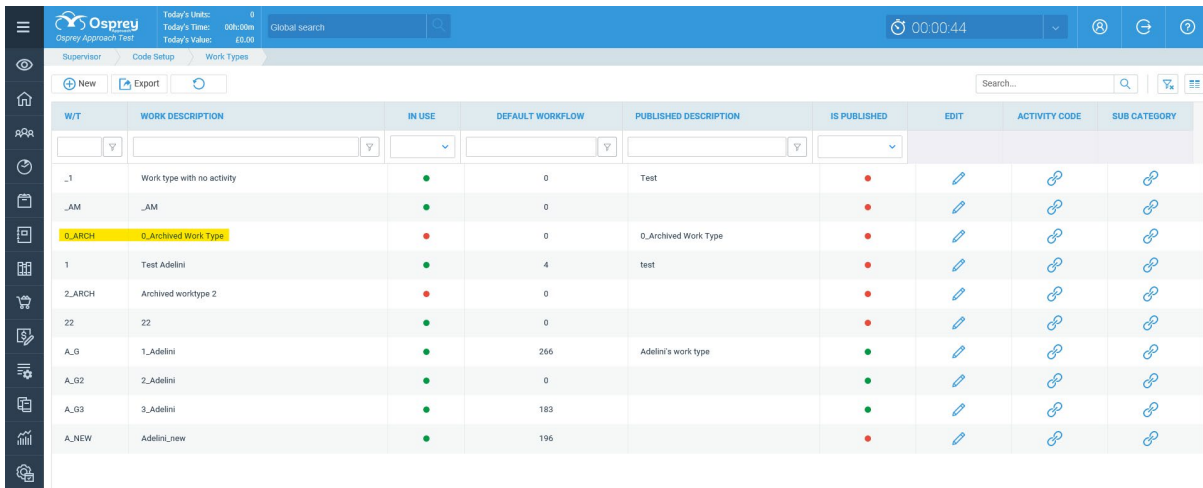
Previously, matter numbers were showing as decimals when used in an SMS message.

This has now been fixed so that matter numbers no longer show 1.00 and now display as 1, for example.

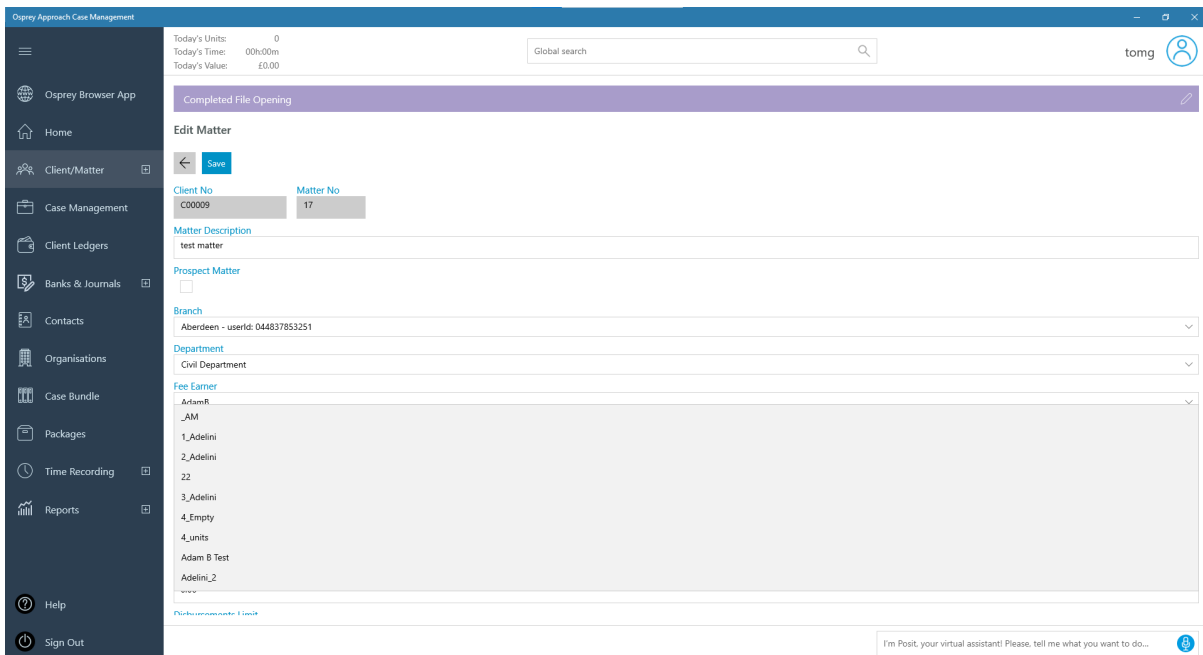
Archived worktypes

Previously, archived worktypes appeared in dropdown lists.

This update has removed archived worktypes, so they can no longer be selected. For example, when opening a new matter so the highlighted worktype below is no longer showing in the list.



W/T	WORK DESCRIPTION	IN USE	DEFAULT WORKFLOW	PUBLISHED DESCRIPTION	IS PUBLISHED	EDIT	ACTIVITY CODE	SUB CATEGORY
_1	Work type with no activity	●	0	Test	●			
_AM	_AM	●	0		●			
0_ARCH	0_Archived Work Type	●	0	0_Archived Work Type	●			
1	Test Adelini	●	4	test	●			
2_ARCH	Archived worktype 2	●	0		●			
22	22	●	0		●			
A_G	1_Adelini	●	266	Adelini's work type	●			
A_G2	2_Adelini	●	0		●			
A_G3	3_Adelini	●	183		●			
A_NEW	Adelini_new	●	196		●			



Osprey Approach Case Management

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

Completed File Opening

Edit Matter

Client No: C00009 Matter No: 17

Matter Description: test matter

Prospect Matter:

Branch: Aberdeen - userId: 044837853251

Department: Civil Department

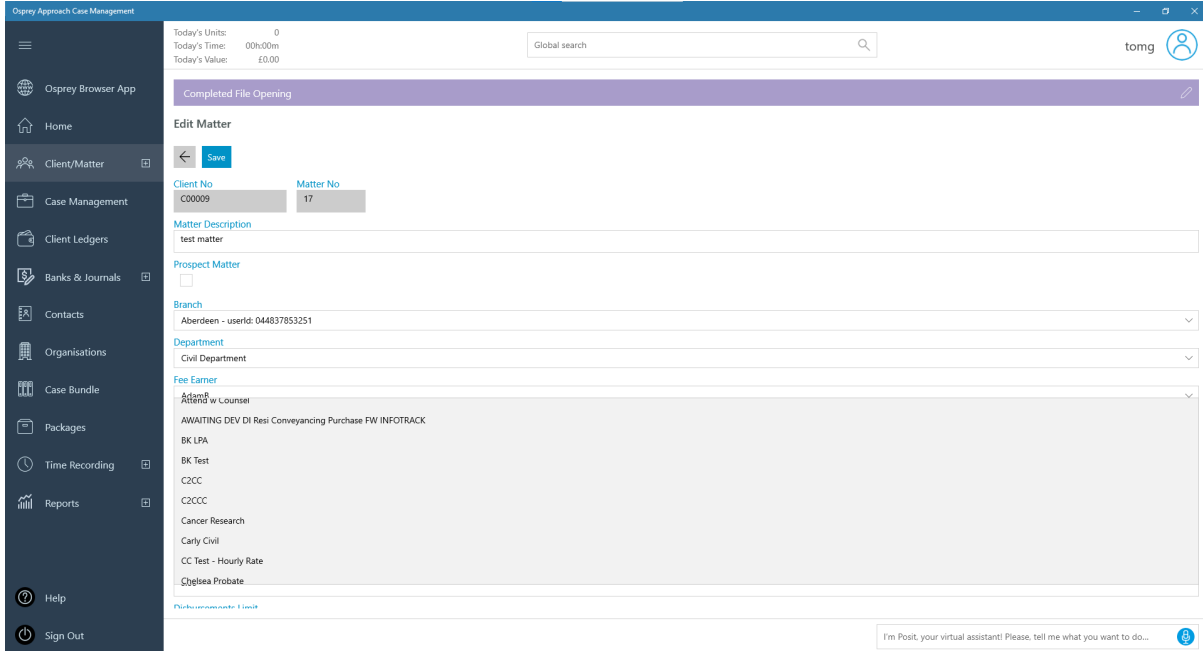
Fee Earner:

- _Adelinr
- _AM
- 1_Adelini
- 2_Adelini
- 22
- 3_Adelini
- 4_Empty
- 4_units
- Adam B Test
- Adelini_2

Footer: I'm Post, your virtual assistant! Please, tell me what you want to do...

Worktype list

The worktype list now shows options in alphabetical order.



The screenshot shows the 'Osprey Approach Case Management' interface. At the top, there are statistics for 'Today's Units' (0), 'Today's Time' (00h:00m), and 'Today's Value' (£0.00). A 'Global search' bar is on the right. A notification bar indicates 'Completed File Opening'. The main area is titled 'Edit Matter' and contains a 'Save' button. Below this, there are fields for 'Client No' (C00009) and 'Matter No' (17). The 'Matter Description' field contains 'test matter'. The 'Prospect Matter' field is empty. The 'Branch' dropdown is set to 'Aberdeen - userid: 044837853251'. The 'Department' dropdown is set to 'Civil Department'. The 'Fee Earner' dropdown is open, showing a list of names in alphabetical order: Arden, Attorn, w Lounse, Awaiting Dev Di Resi Conveyancing Purchase FW INFOTRACK, BK LPA, BK Test, C2CC, C2CCC, Cancer Research, Carly Civil, CC Test - Hourly Rate, and Chelsea Probate. At the bottom right, there is a chatbot prompt: 'I'm Post, your virtual assistant! Please, tell me what you want to do...'

Formulae and client names

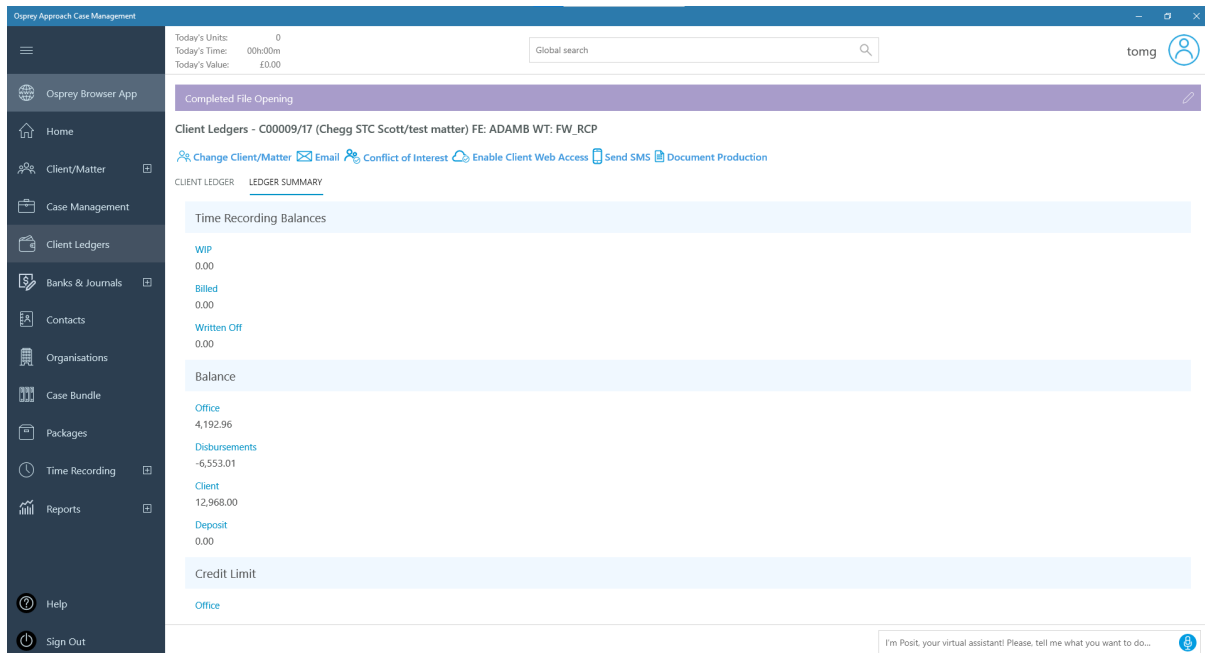
Previously, formulae would not display if special characters were in the data set. For example, if there was a formulae for client names, if the surname had an apostrophe in it, the formulae would not work.

This has now been fixed to display any special characters in the formulae.

Ledger summary

An issue existed where the ledger summary, under Client Ledgers, was duplicating the office and disbursement value and not displaying the client or deposit values.

This has now been fixed to show the client / deposit values, where previously the office / disbursement was duplicated.



Osprey Approach Case Management

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

tomg

Completed File Opening

Client Ledgers - C00009/17 (Chegg STC Scott/test matter) FE: ADAMB WT: FW_RCP

Change Client/Matter | Email | Conflict of Interest | Enable Client Web Access | Send SMS | Document Production

CLIENT LEDGER | LEDGER SUMMARY

Time Recording Balances

WIP	0.00
Billed	0.00
Written Off	0.00

Balance

Office	4,192.96
Disbursements	-6,553.01
Client	12,968.00
Deposit	0.00

Credit Limit

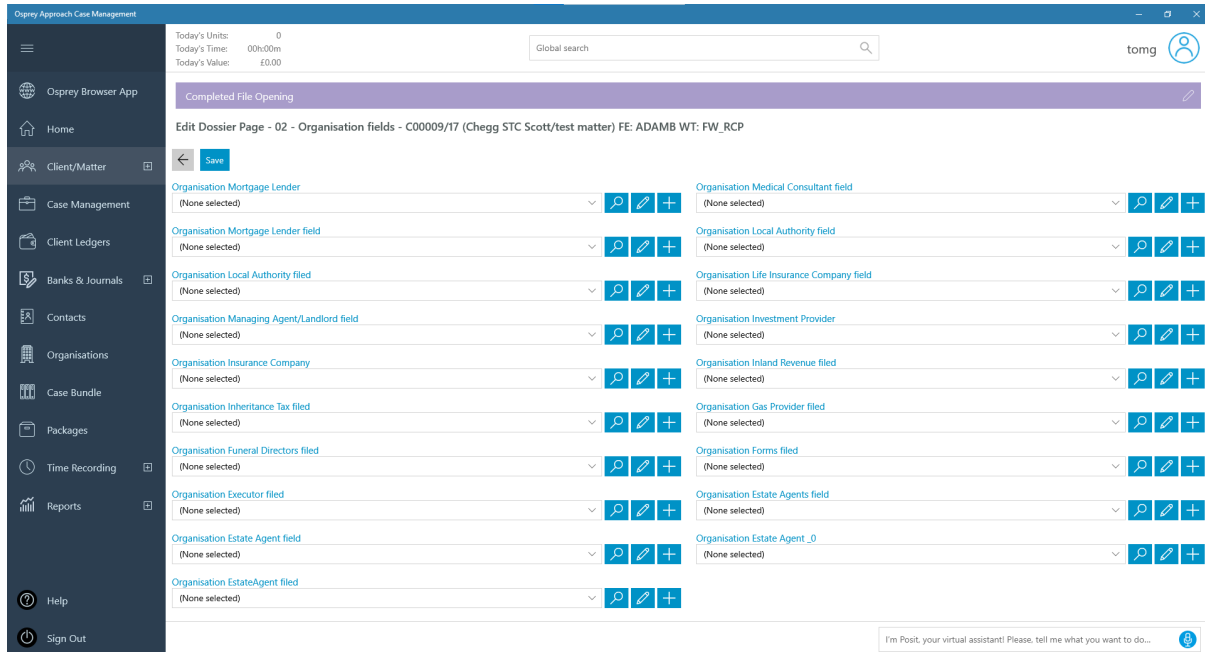
Office	
--------	--

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Organisation fields

Previously, you were unable to add / edit organisations when filling out Dossier pages.

This update now enables you to include the add / edit buttons when filling out dossiers.



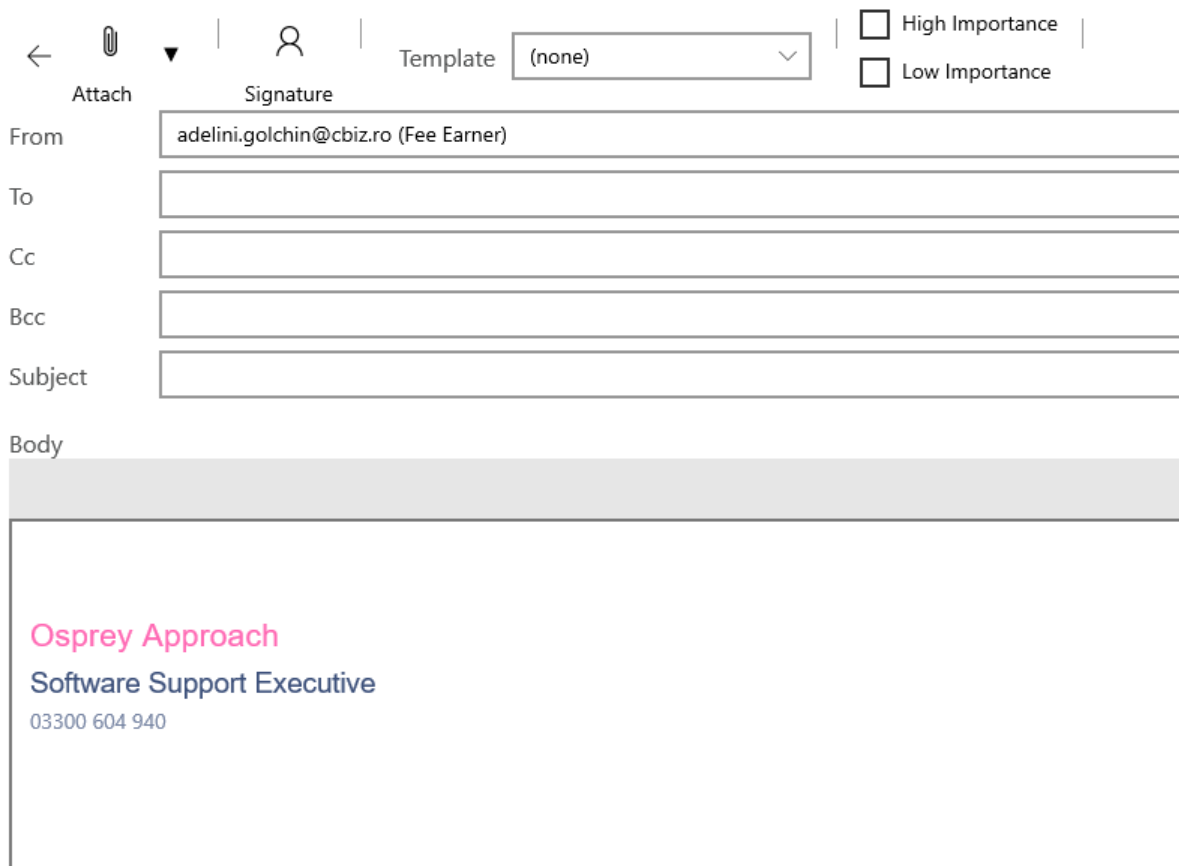
The screenshot shows the 'Edit Dossier Page - 02 - Organisation fields - C00009/17 (Chegg STC Scott/test matter) FE: ADAMB WT: FW_RCP'. The interface features a sidebar with navigation options: Osprey Browser App, Home, Client/Matter, Case Management, Client Ledgers, Banks & Journals, Contacts, Organisations, Case Bundle, Packages, Time Recording, Reports, Help, and Sign Out. The main content area displays a grid of fields for selection, each with a dropdown menu and icons for search, edit, and add. The fields include:

- Organisation Mortgage Lender (None selected)
- Organisation Mortgage Lender field (None selected)
- Organisation Local Authority filed (None selected)
- Organisation Managing Agent/Landlord field (None selected)
- Organisation Insurance Company (None selected)
- Organisation Inheritance Tax filed (None selected)
- Organisation Funeral Directors filed (None selected)
- Organisation Executor filed (None selected)
- Organisation Estate Agent field (None selected)
- Organisation EstateAgent filed (None selected)
- Organisation Medical Consultant field (None selected)
- Organisation Local Authority field (None selected)
- Organisation Life Insurance Company field (None selected)
- Organisation Investment Provider (None selected)
- Organisation Inland Revenue filed (None selected)
- Organisation Gas Provider filed (None selected)
- Organisation Forms filed (None selected)
- Organisation Estate Agents field (None selected)
- Organisation Estate Agent_0 (None selected)

Email signatures

Email signatures had not been displaying the same way as they did in the browser.

With this update, email signatures now display the same in the case management app as they do in the browser.



← Attach | Signature | Template (none) | High Importance | Low Importance

From: adelini.golchin@cbiz.ro (Fee Earner)

To:

Cc:

Bcc:

Subject:

Body

Osprey Approach
Software Support Executive
03300 604 940

Outlook connector emails

Users previously were unable to reply to an email that was imported using the outlook connector.

With this update, emails can now be replied to, even if they are imported using the outlook connector.