



Release Notes

Update: v1.1.0

Web Portal

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Updated Workflow Progress View

Clients and associates can now see a clearer breakdown of the progress of a workflow, which now matches the visuals in the mobile portal app.

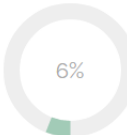
Purchase of 6 Anfield Road

Handled by Dan H Residential Conveyancing Purchase

Status
17 Documents
0 Messages
1 DocuSign
Contact

Current Stage
Key dates

Residential Conveyancing Purchase



6%

- File Opening/Data Entry
- Client Care Pack
- Receipt of Estate Agent's Memorandum of Sale

27/09/2022

Associate Grid View

Associates will now see a list of matters, grouped by the client, when accessing their current cases. The assigned solicitor's name and type of matter is now listed too.

Current cases
My details
New enquiry
Contact
Grid List

Rebecca Cowell

COW00002

Case	Solicitor	Type
Family Matter	Rebecca Cowell	Family

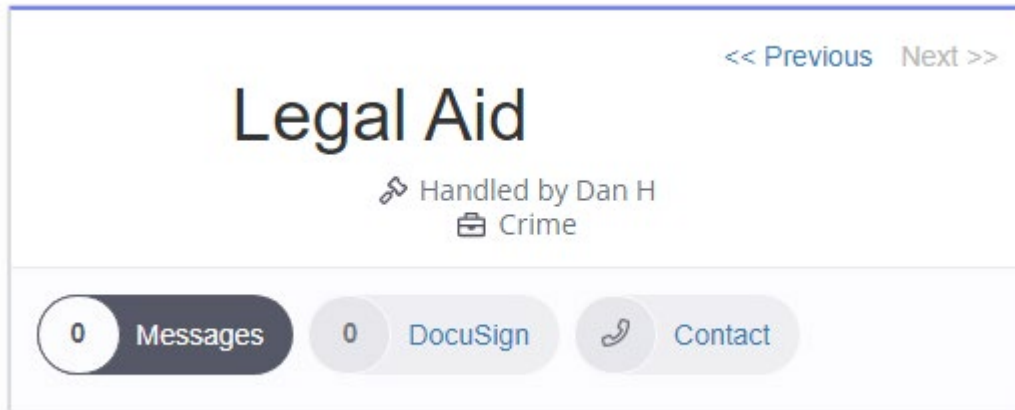
Matthew Wilson

100003

Case	Solicitor	Type
Purchase of 6 Anfield Road	Dan H	Residential Conveyancing Purchase
Wills	AdamB	Wills Focused Workflows
Permission	TEEG	Residential Conveyancing Sale
Legal Aid Matter	Dan H	Crime

Associate Next / Previous

If the client has multiple matters, associates can also easily switch between matters on a single client using the Next / Previous arrows.

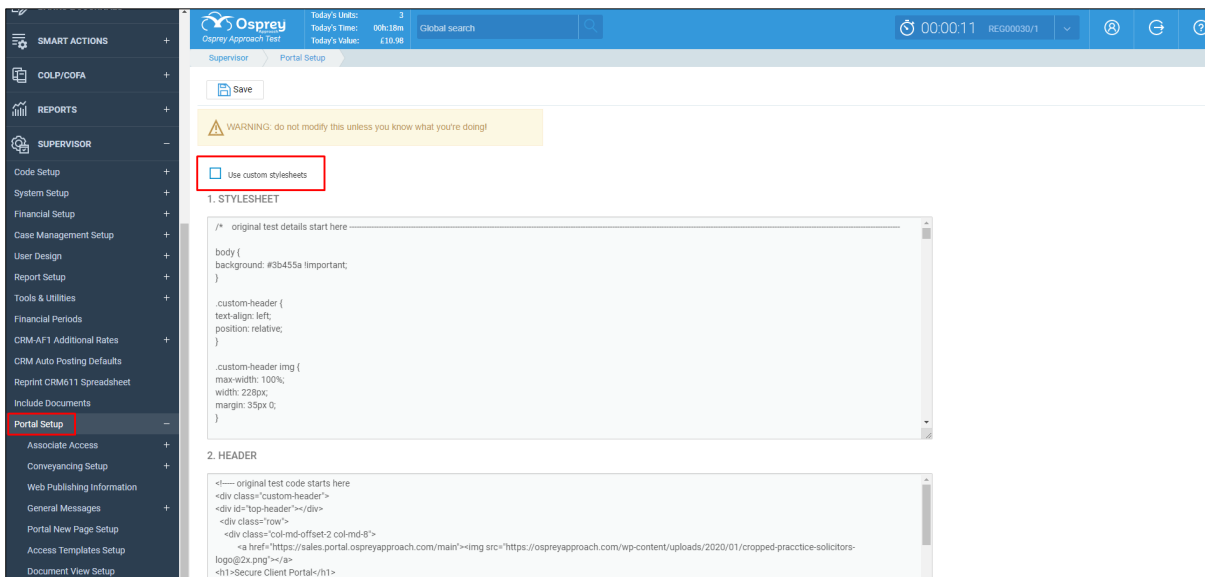


Custom Style Setup

Firms can now apply their own style sheets to the portal allowing further customisation.

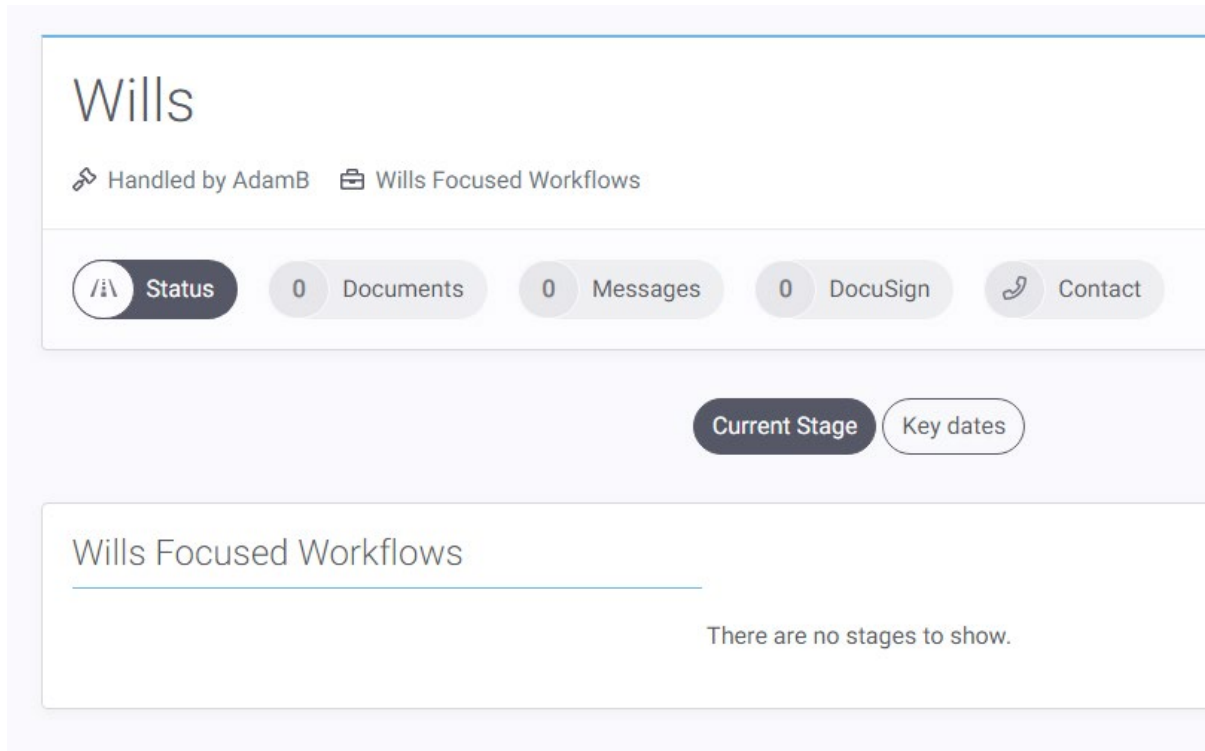
To enable, Supervisors should access: Supervisor > Portal setup, and toggle "User custom Style Sheets".

Leaving unticked will use the default web portal style.



Button Refinements

To help identify which area of the web portal you're currently in, the buttons will now stay highlighted to show which options are selected.



The screenshot displays the 'Wills' section of a web portal. At the top, the title 'Wills' is followed by 'Handled by AdamB' and 'Wills Focused Workflows'. Below this is a navigation bar with five buttons: 'Status' (highlighted in dark blue), '0 Documents', '0 Messages', '0 DocuSign', and 'Contact'. Further down, there are two more buttons: 'Current Stage' (highlighted in dark blue) and 'Key dates'. The main content area is titled 'Wills Focused Workflows' and contains the text 'There are no stages to show.'