SmartAdvocate Release Notes (v2015.08.28)

These release notes cover updates and new features added to SmartAdvocate software between April 2015 and August 2015.

Important Notes

August 2015 release of SmartAdvocate introduces support for **Windows 10** and **Microsoft Edge** browser.

August 2015 release of SmartAdvocate introduces support for **Chrome** on **Mac OS** browser. You will now be able to work with documents in SmartAdvocate on Macs the same way you do on Windows. It does require mapping of the network location on your Mac (we have a script for that that you only need to run 1 time), but after that, double-clicking on the document in SmartAdvocate opens it directly in the application you have associated with that file type. You will need the following components installed:

- Chrome Extension
  https://chrome.google.com/webstore/detail/sadocumentextension/ofcdbngfnpdlmdligcclbkihfbahdnph?hl=en-US
- Mac version of Document Launcher Application - SADocumentLauncher, located on your server in the plugins directory. Check with your IT for the exact location and installation procedure.

Reminder: Starting with the December 2014 release, **SmartAdvocate requires version 11 of Internet Explorer** running *without* Compatibility Mode (only for SmartAdvocate website). SmartAdvocate will work with earlier versions of Internet Explorer, but some of the pages/dialogs may not render correctly. See December 2014 release notes for details.

Starting from December 2014 release, **SmartAdvocate** supports **Google Chrome** on **Windows**. Note that working with documents in Chrome requires two components:

- Chrome Extension
  https://chrome.google.com/webstore/detail/sadocumentextension/ofcdbngfnpdlmdligcclbkihfbahdnph?hl=en-US
- Document Launcher Application - SADocumentLauncher.exe located on your server in the plugins directory. Check with your IT for the exact location and installation procedure.
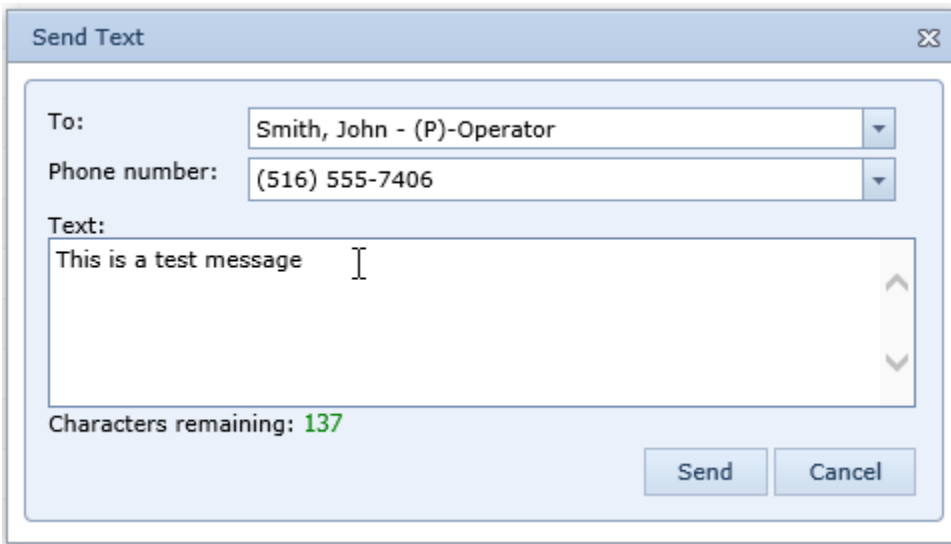
Support for texting (SMS)

Starting with the August 2015 release, SmartAdvocate can be integrated with CallFire text messaging service. When enabled, this integration will allow you to send and receive text messages in SmartAdvocate.

Individual as well as mass text messages are supported.
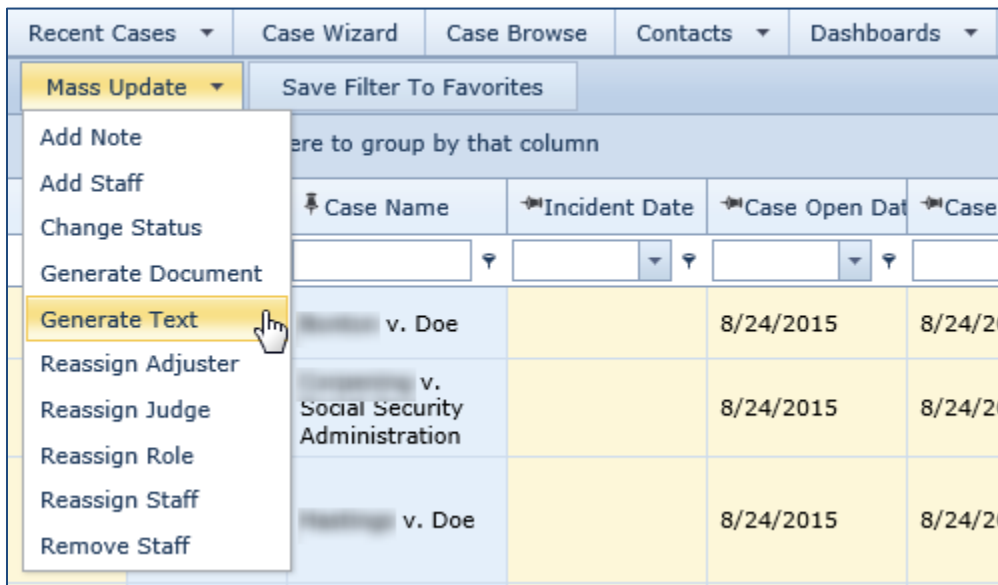
New button on the case tool bar:
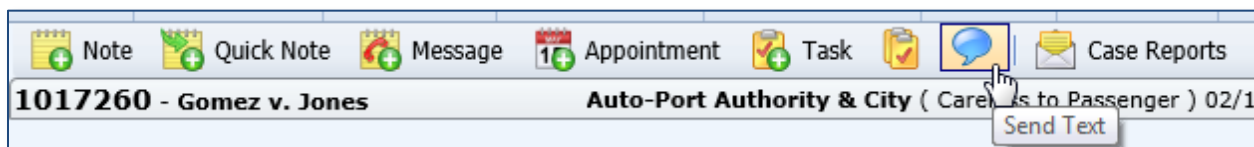
Individual text message dialogue:

Mass Texting option on the Case Browse Results page (after you search for cases, select the cases you want to send a Text Message to):

Incoming and outgoing text messages will be shown on the Case Notes page:

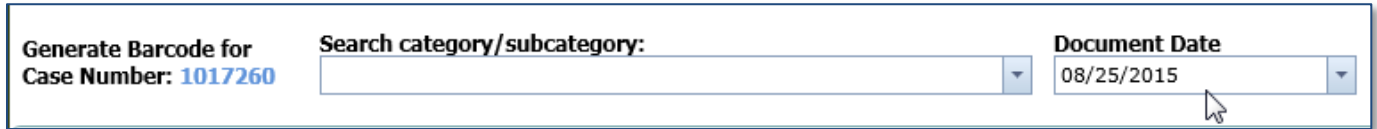| Date	Staff	Notes	Type
			Text
06/25/2015 4:00PM		**From:** Igor V. Selizhuk, Esq. (516) 7406 It works!	Incoming Text Message
06/25/2015 11:43AM	Selizhuk, Igor V., Esq.	**To:** Igor V. Selizhuk, Esq. (516) 7406 This is a test from your lawyer (.com)	Outgoing Text Message

In addition to filing outgoing and incoming text messages on the Case Notes page of the case the text relates to (with an updated Type – see image), when an incoming text message is received, assigned case staff will receive an email notification with the contents of the incoming text message (the incoming notification can be disabled in User Preferences).

Note: You will need to open an account with CallFire and are responsible for all charges associated with text messaging. As of this writing, by using SmartAdvocate's integration, you will be eligible for special rate of 2 cents per message (instead of 5 cents per message regular rate) with no minimum usage or monthly fees.

Updated Pages - Description of Update/Change

- Barcode Generation – added ability to specify the date on the document

- Case Browse – was redesigned with new functionality added

    o   Added Recent searches dropdown
    o   Ability to search all types of case referral sources
    o   Ability to select columns that should be included on the Case Browse results page
    o   Option to list case numbers as a search criteria (in Case Browse Misc tab)
    o   Ability to save different Case Browse filters with different Case Browse results page layout

- Case Browse Results - Mass Update on the Case Browse results page now has additional useful "mass" options. Now you can Remove Staff and Send Mass Text messages (if SMS integration is enabled) in addition to previously available Mass Update operations - Add Note, Add Staff, Change Status, Generate Document, Reassign Adjuster, Reassign Judge, Reassign Role and Reassign Staff.
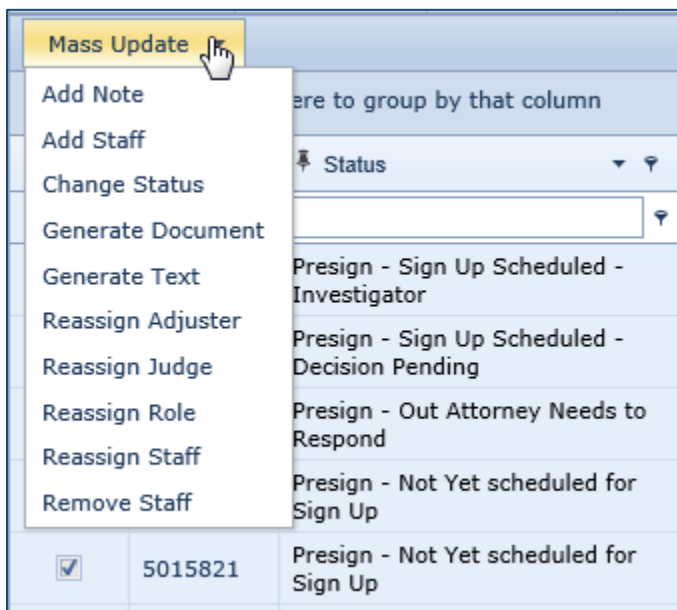
- **System Parameters** – new administration page that allows configuration of various system parameters which previously had to be configured directly in the database.

Group Description		Parameter Description		Selected Value		Actions
Intake Review Dashboard		List of statuses that indicate that the new case was reviewed and Rejected. Transition from other Pre-sign status to one of these will add the case to Intake Review Dashboard.		Closed Case,File To Be Closed		✎
Login		Maximum number of user login attempts. Account will be locked if number of attempts is exceeded.		10		✎
Automatic Notes		Show added appointments as Notes		False		✎
Automatic Notes		Show citical comments as Notes		False		✎
Automatic Notes		Show negotiations as Notes		True		✎

- **System Parameters (Internal)** – same as System Parameters, but the parameters on this page are usually set up once during system installation and should not be changed without consulting with SmartAdvocate.
- **Recent Cases** – This always has shown the last 20 cases a user visited. A new page was added that shows a full list of the cases a user accessed. A link is at the bottom of the Recent Cases menu.

- **Case Summary** – new indicators to display if Liens or Counter Claims/Third Party Actions are present in the case

- **Case Summary** – Court/Dockets panel will show docket/index comments if existing

- Case Summary – if plaintiff's nickname is entered on the contact card, it will be displayed on the Case Summary page

Plaintiffs	
Plaintiff	Role
Ramadan, Scherezada S., Esq. - *"Schery"* (Spanish, French)	(P)-Guardian

- Case Summary – New Tab was added to display Liens

Incident Facts	Injuries	Liens	Other Cases	Surrogate	Bankruptcy	Related Cases	Other Plaintiffs

Plaintiffs	Unconfirmed	Confirmed	Waived	Negotiated	Paid
	$286,260.00	$291,260.00	$45,000.00	$41,250.00	$250.00
	$5,231.00	$6,944.00	$0.00	$0.00	$0.00

- Case Summary – quick information panel (right-click on the name) will show if prevent mailing is enabled (either manually or based on the plaintiff being underage or deceased)

Baby, jane (I)   (P)-Plaintiff

Contact Info   ☒

Warning: Prevent Mailing Enabled. Infant.

Address: 1 Main St ,
Townville, NY 11050

Phone #: (213) 546-9875 - Originating Phone #
(P)

Email: fakeemail@fakedomain.com

Date of Birth: 04/06/2015   **SSN:** 125-48-9658
Age: 0 year,4 month(s),18 day(s)

- Member-MDL Cases – page (formerly labeled MDL Cases) – Page was redesigned and the link on the Case menu changed from MDL Cases (Multidistrict Litigation).
  Also, the "MDL" case label has been changed to "Master Case":

Edit Case   ☒

Main Details

Type:	Not Death	▼
Sub Type:	Recalled Status Unknown	▼

Incident State: New York ▼   **Office:** New York ▼

Serious Injury: ☐   **Master Case:** ☑

Wanted/Accepted Date [ ] ▼   **Expected Resolution:** [ ] ▼

- Member-MDL Cases results page will display all cases of the same case type that are filed in the same court as the "Master Case":


- Problem Cases Dashboard was updated to include two additional problem types: Cases without incident date and Cases without incident state (or with unknown state)

- Document Generation page now has an option to analyze document before generating to see if any of the merge codes in the document are missing data in any of the corresponding fields in the case which would result in the document having empty values for those merge codes
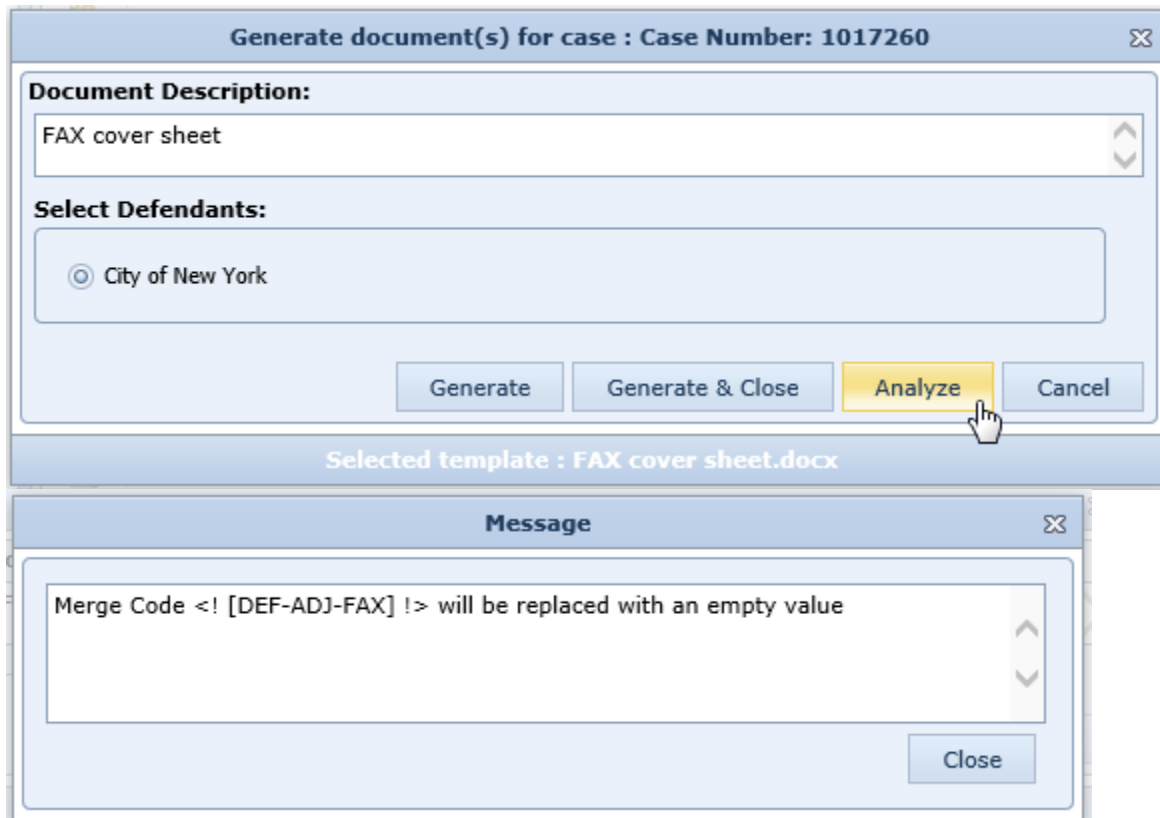
- My SmartAdvocate page (formerly called "Today") will now remember sorting performed by user

- My SmartAdvocate page (formerly called "Today") – panels now have additional filtering options, such as an option to include or not include tasks and appointments from closed cases.

- Case Email page has been completely redesigned. Some of the important changes:
  - Templates are selected from the dropdown picklist
  - Ability to select any email address from all contacts in the system
  - Ability to attached documents from the case
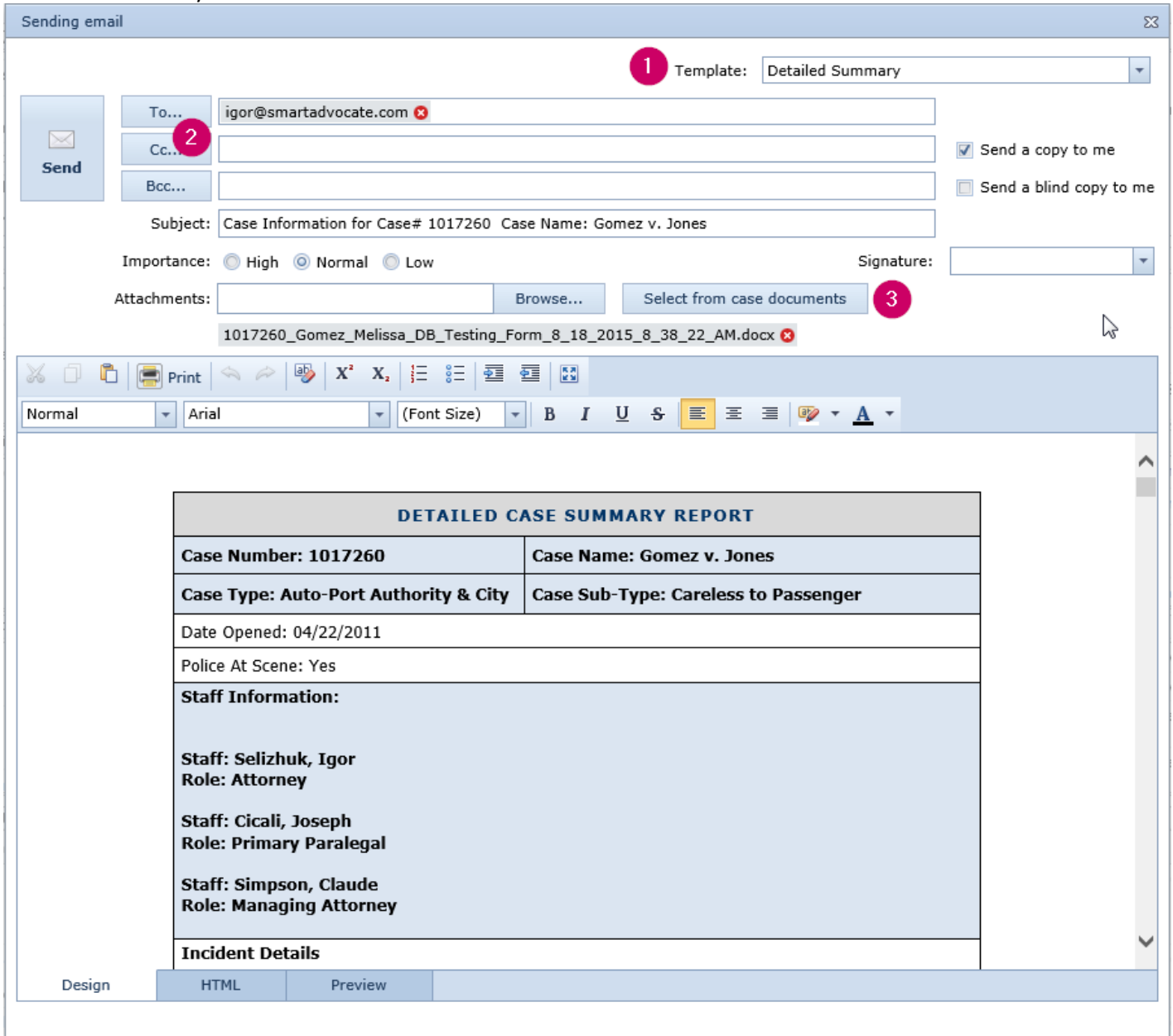
- Top Search Results – new column "Additional Plaintiffs" was added

- Picklist maintenance – More options have been added to the Picklist Maintenance page.

New Merge Codes Added

PL-DOB-MONTH	Plaintiff Date of Birth (Month)
PL-DOB-DAY	Plaintiff Date of Birth (Day)
DEF-FAX	Defendant Fax Number
DEF-ATTY-SUFFIX	Defendant Attorney Suffix
REF-OUT-ATTY-FIRST-NAME	Referred Out Attorney First Name
REF-OUT-ATTY-LAST-NAME	Referred Out Attorney Last Name
PL-EMP-FAX	Employer Fax
PL-GENDER	Plaintiff Gender
PL-GUARDIAN-LAST-NAME	Plaintiff Guardian Last Name
PL-GUARDIAN-FIRST-NAME	Plaintiff Guardian First Name
PL-GUARDIAN-PREFIX	Plaintiff Guardian Prefix
PL-GUARDIAN-SUFFIX	Plaintiff Guardian Suffix
PL-AUTO-OWNER-ADDRESS-BLOCK	Plaintiff Automobile Owner Address block
PL-AUTO-OWNER-CITY-STATE-ZIP	Plaintiff Automobile Owner Address (City, State Zip)
PL-AUTO-OWNER-ADDR-HORIZ	Plaintiff Automobile Owner Address Horizontal
PL-AUTO-OWNER-ADDR1	Plaintiff Automobile Owner Address1
PL-AUTO-OWNER-ADDR2	Plaintiff Automobile Owner Address2
PL-INJ-SIDE	Plaintiff Injured Side
PL-INJ-NAME	Plaintiff Injury Name
PL-INJ-FULL	Plaintiff Injury Full description
PL-STATE-EXP	Plaintiff Address Expanded State
DEF-STATE-EXP	Defendant Address Expanded State
INC-STATE-EXP	Incident Expanded State
MED-PRVD-ADDRESS-HORIZ	Medical Provider Address Horizontal
DEF-ATTY-FIRM-ADDRESS-HORIZ	Defendant Law Firm Address Horizontal
INC-ADDR1	Get Address1 Of Incident
INC-ADDR2	Get Address2 Of Incident
INC-CITY-STATE-ZIP	Get CITY-STATE-ZIP Of Incident
INC-ADDRESS-BLOCK	Get Address Block Of Incident
INC-ADDRESS-HORIZ	Get Horizontal Address Block Of Incident
INC-CITY	Get City Of Incident
PL-GUARDIAN-ZIP	Plaintiff Guardian Zip
PL-GUARDIAN-CITY-STATE-ZIP	Plaintiff Guardian City State Zip
PL-GUARDIAN-ADDRESS-BLOCK	Plaintiff Guardian Address Block
PL-GUARDIAN-ADDRESS-HORIZ	Plaintiff Address Block Horizontal
PL-GUARDIAN-ADDR1	Plaintiff Guardian Address1
PL-GUARDIAN-ADDR2	Plaintiff Guardian Address2
PL-GUARDIAN-ADDR3	Plaintiff Guardian Address3
PL-GUARDIAN-CNTY	Plaintiff Guardian County
PL-GUARDIAN-CITY	Plaintiff Guardian City

| PL-GUARDIAN-STATE	Plaintiff Guardian State
CA-ATTY-OCCUP	Case Attorney Occupation
FIRM-ATTORNEY-OCCUP	Firm Attorney Occupation
CA-ATTY-FAX	Case Attorney Fax
CA-ATTY-PHONE	Case Attorney Phone
CA-ATTY-EMAIL	Case Attorney Email
DEF-ADJ-EMAIL	Defendant Adjuster Email
PL-ADJ-EMAIL	Plaintiff Insurance Adjuster's Email
PL-NF-ADJ-EMAIL	No Fault Insurance Adjuster Email

New/Updated Reports

- Fees Outstanding Report has been updated to include additional columns

- Overdue Tasks Report has been updated to allow advanced filtering


- Client Birthday Report has been updated adding two additional options in the Status filter (All and Closed)

- Calendar Report Advanced – new report has been added. It is similar to calendar report, but designed to be "export friendly". This report has additional sorting and column selection options.

Other Changes

- The "Today" page was renamed "My SmartAdvocate"

- Link to Help file is now available on the main SmartAdvocate menu
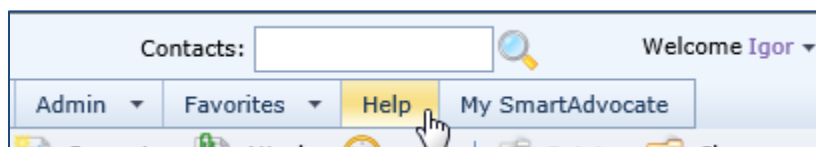

- New type of the merge codes has been introduced - Dynamic Merge Codes. These types of the merge codes allow SmartAdvocate users to add Notes and User Definable Fields (UDFs) to their document templates. Short names for UDFs and Notes (required for merging) can be defined on the Pick List Maintenance page.
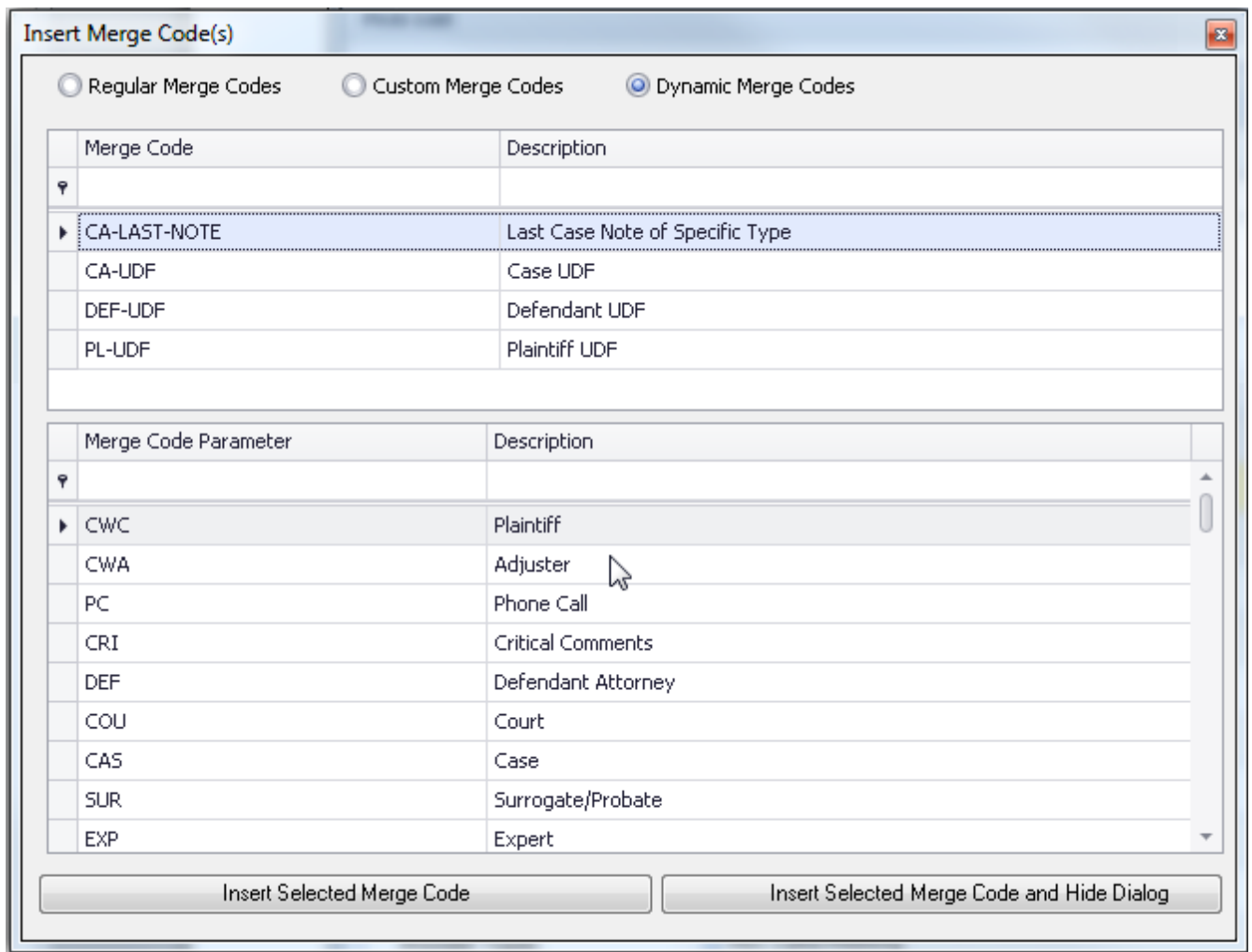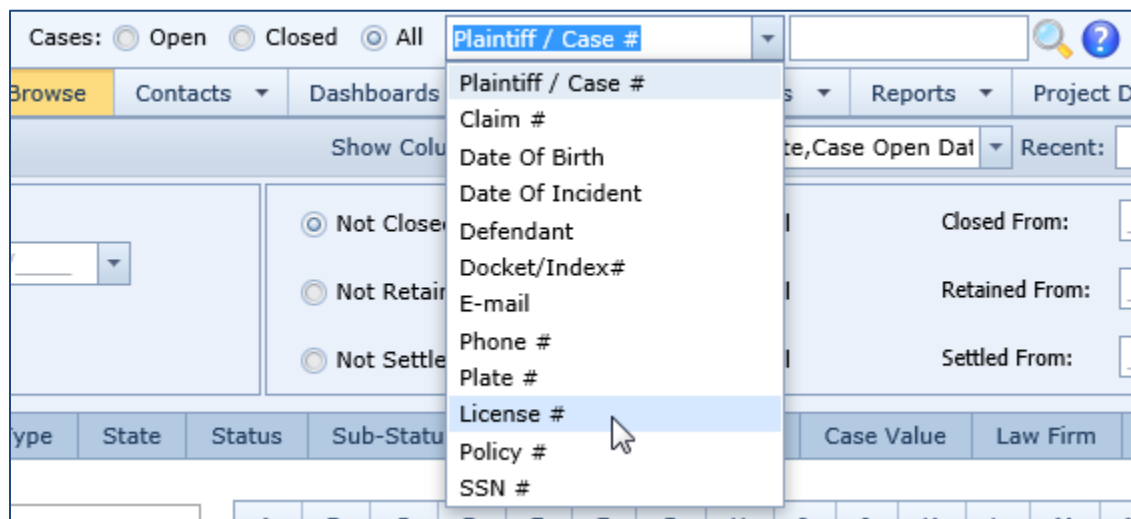
- Notes dialog now has ability to insert contact's name and/or phone number
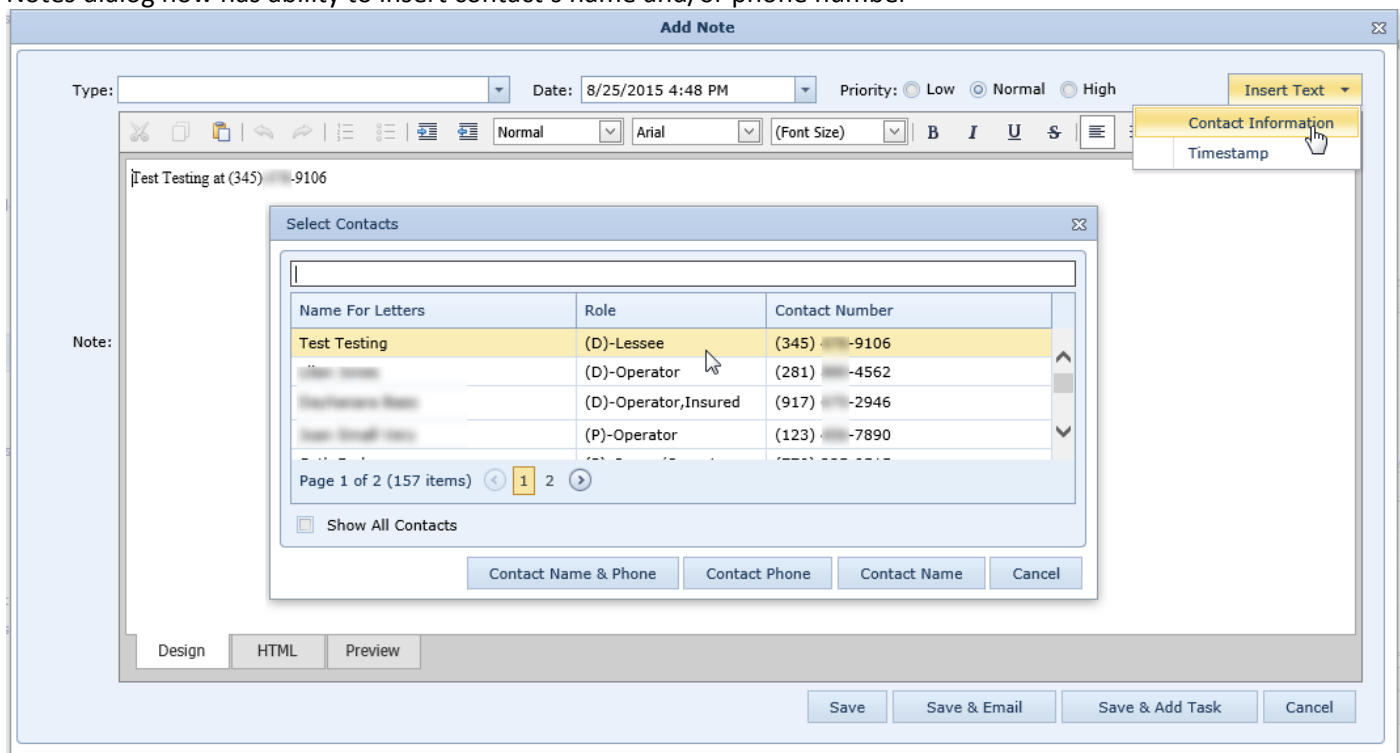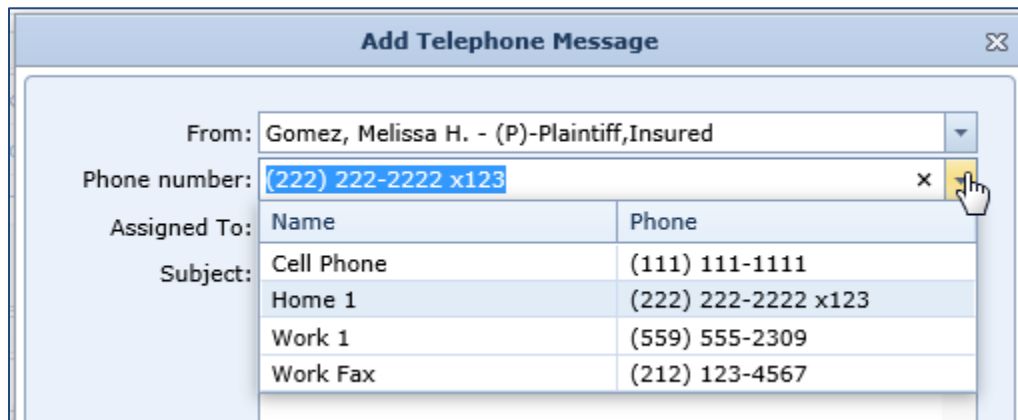
- Added ability to add a Quick Note and immediately edit the Note before saving it
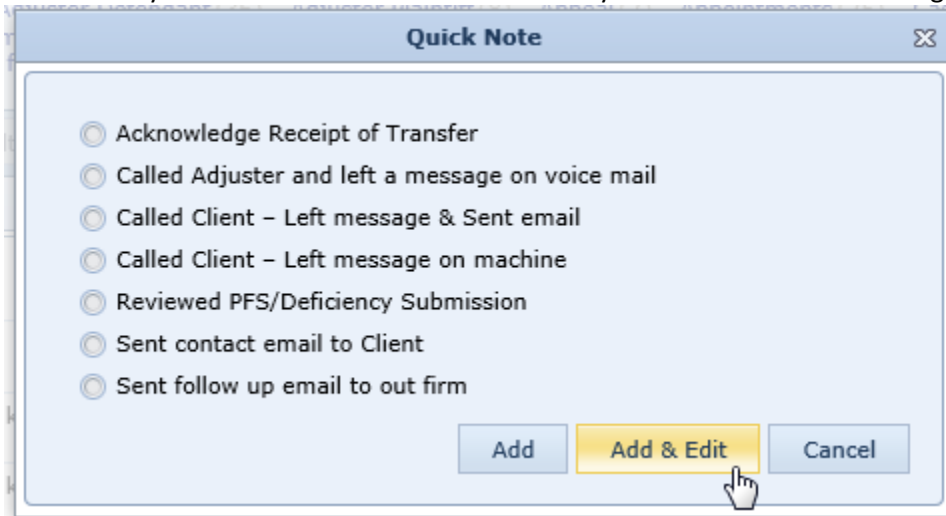
- Drivers License Number added as an option on the Top Search

- Note creation and modification dates will be shown when Note is printed

- When creating a telephone message, you can now choose a call back number from any of the contact's numbers


- Option to select any contact as appointment participant was added to Appointment dialog
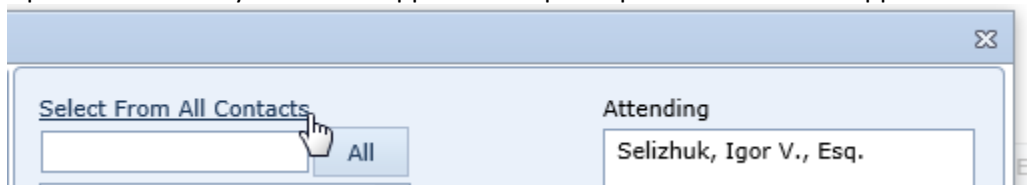
- Support for fax servers has been introduced. When fax server address is configured in the System Parameters, the system will offer FAXNUMBER@faxserver as an option when selecting email addresses.
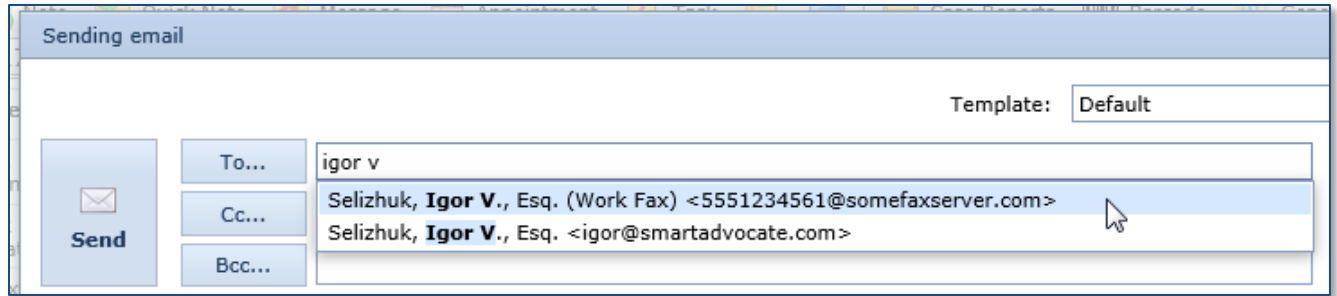
- When adding a new appointment, you can now easily add a phone number associated with the selected meeting location. This is perfect for setting up conference calls or meetings where some participants will be calling in.
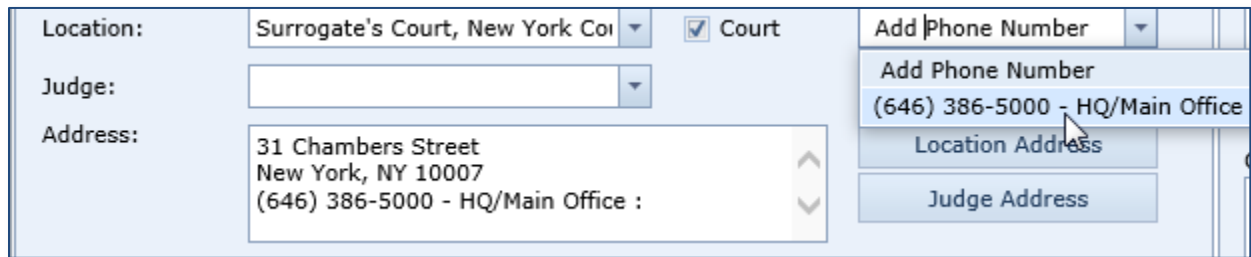
- Phone numbers on the contact cards can now be marked as "text enabled"
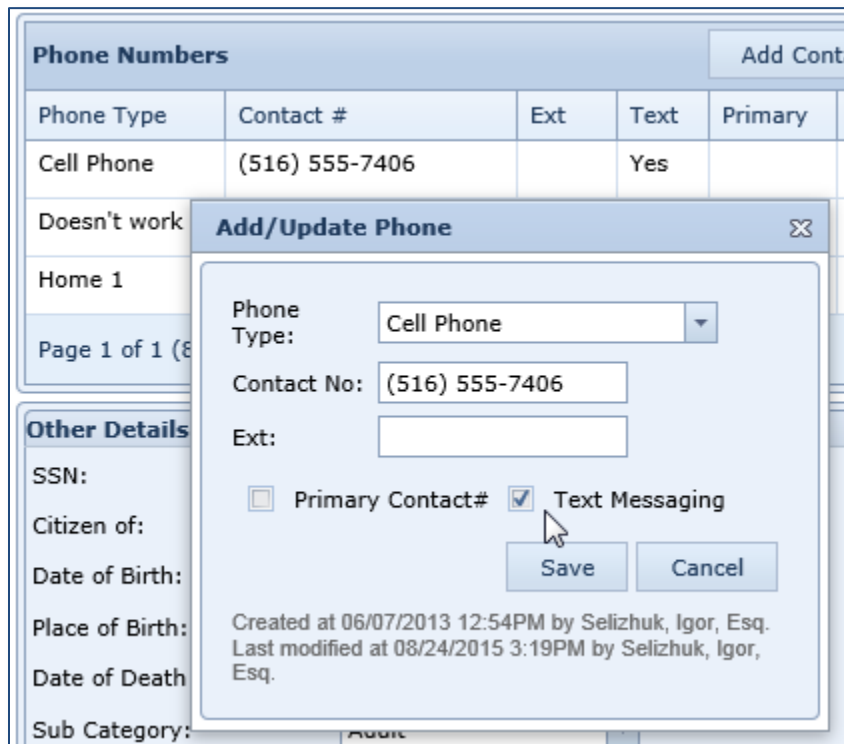
- Case Types can now be configured to have up to four Incident Dates/Locations. This is helpful in certain case types, i.e. product liability, where SOL based on discovery, etc. SOLs can be configured to depend on any of the Incident Dates as well as on Date of Birth or Date of Death.

- Office Hours field was added to organizational contact cards

- Outlook plug-in enhancements:
  - Outlook plug-in now allows user to specify Document Date, which defaults to the email date
  - Document direction is automatically populated based on the location of the email being attached – outgoing if the email is in Sent Items – incoming if item is in Inbox
  - When email is attached from Sent Items, cases associated with email recipient will be automatically shown on the "Recipient's Cases" tab
  - Added an option to append an original file name to a document description

- When emailing a Note, the priority of the Note will automatically be the priority of the email