

SmartAdvocate Release Notes (v2015.11.01)

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

Important Notes

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

August 2015 release of SmartAdvocate introduced 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:

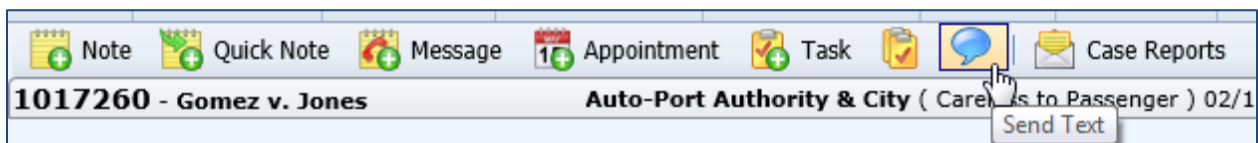
- Chrome Extension
<https://chrome.google.com/webstore/detail/sadocumentextension/ofcdbngfnpdldmlicclbkihfbahdnph?hl=en-US>
- Mac version of Document Launcher Application - SADocumentLauncher, located on your server in the plugins directory. Check with your IT for the exact location and installation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

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:

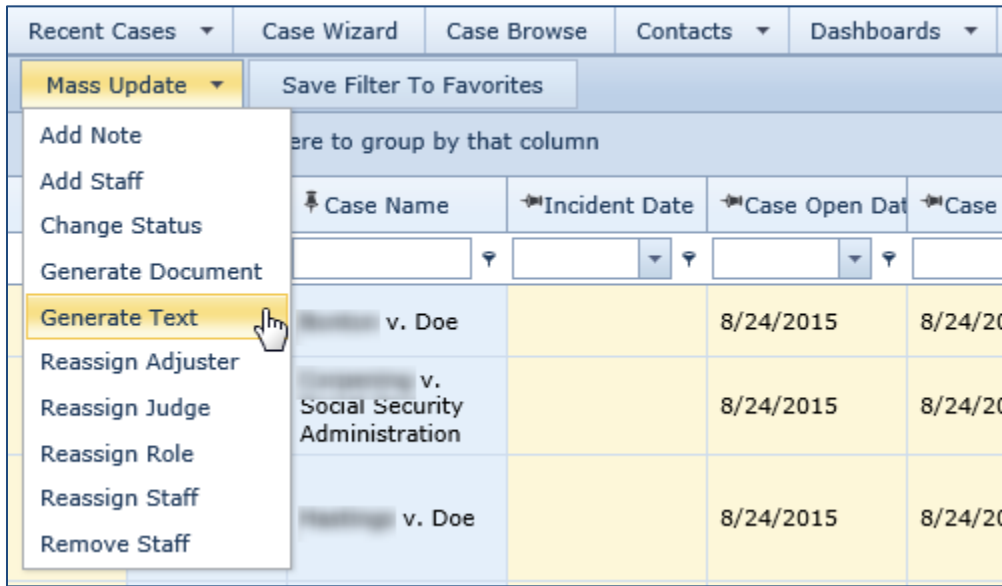


Individual text message dialog:

A screenshot of the 'Send Text' dialog box. The dialog has a title bar with the text 'Send Text' and a close button. It contains the following fields:

- 'To:' dropdown menu with the selected value 'Smith, John - (P)-Operator'
- 'Phone number:' dropdown menu with the selected value '(516) 555-7406'
- 'Text:' text area containing the text 'This is a test message' and a cursor.
- 'Characters remaining: 137' displayed in green text below the text area.
- 'Send' and 'Cancel' buttons at the bottom right.

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:

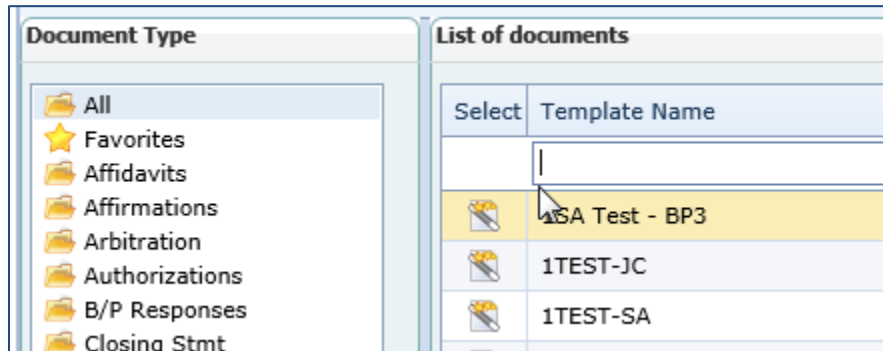
Date	Staff	Notes	Type
			Text
06/25/2015 4:00PM		From: Igor V. Selizhuk, Esq. (516) 7406 It works!	Incoming Text Message
06/25/2015 11:43AM	Selizhuk, Igor V., Esq.	To: Igor V. Selizhuk, Esq. (516) 7406 This is a test from your lawyer (.com)	Outgoing Text Message

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).

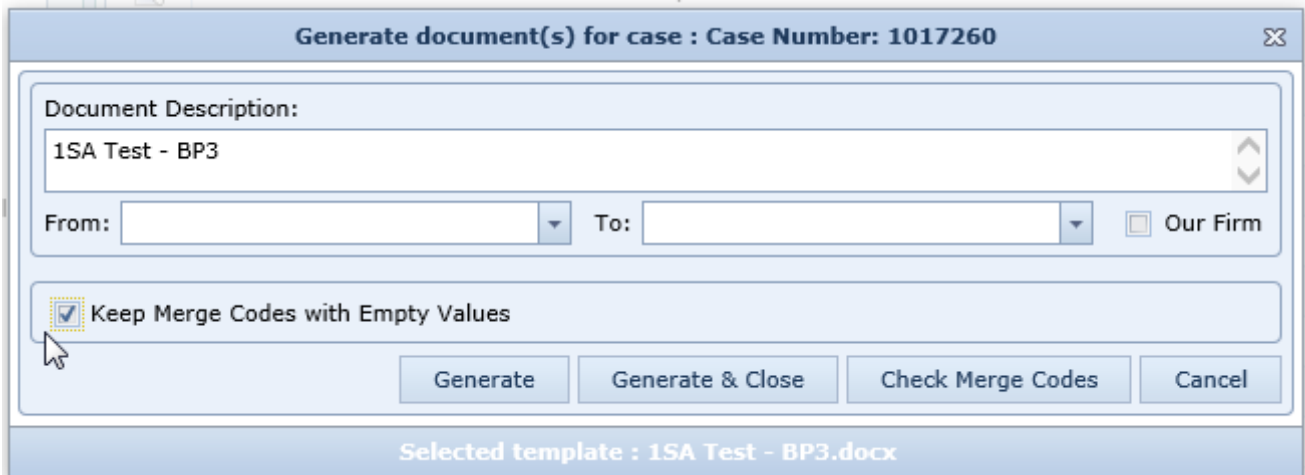
Note: You will need to open an account with CallFire and are responsible for all charges associated with text messaging. As of this writing, by using SmartAdvocate’s integration, you will be eligible for special rate of 2 cents per message (instead of 5 cents per message regular rate) with no minimum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

Updated Pages

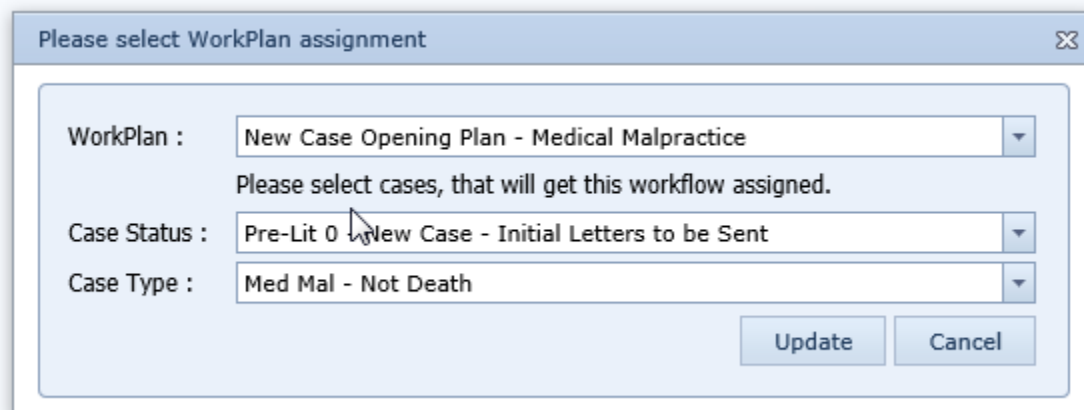
- Case Arbitration/Mediation page was redesigned.
- Case Summary– added enforcement of the “Read only” permission. When Case Summary page is set as “Read Only” for the user group users in this group will not be able to change case status, staff assignments, or case properties (Edit Case button).
- Case Document Generation– as soon as you go to that page the focus will be automatically set to template filter:



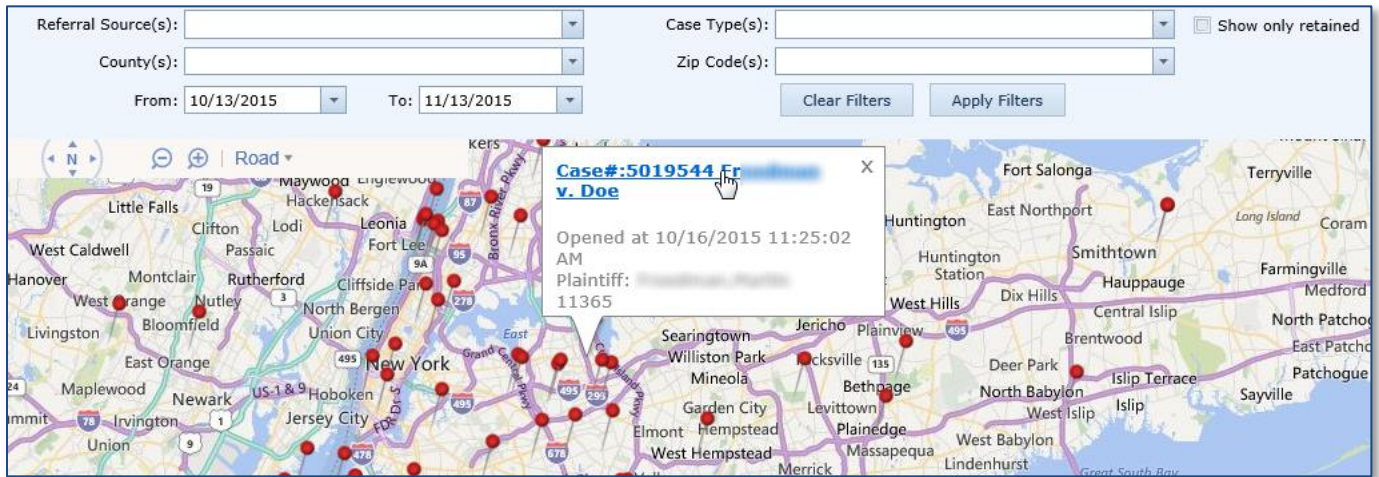
- Case Document Generation– added new option to keep merge codes that would otherwise be replaced with empty value. This can help identify areas of the document that need manual editing. Also, From and To fields were added.



- Plaintiff – Medical Provider – added ability to edit medical records request status date.
- Settlement/Fee Production Dashboard – added ability to filter by Open/Closed cases.
- Surrogate Decedents Information page was redesigned.
- WorkPlan Assignments page – added ability to automatically assigned a Work Plan to a case when case status changes:



- Map Dashboard was updated with new filters and ability to click into the case:



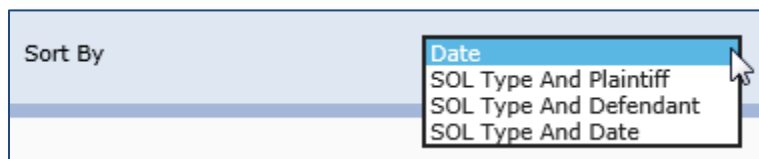
New Merge Codes Added

ADMN-LETTER-ISSUE-DATE	Letters Of Administration Letters Issued On Date
ADMN-ORDR-RCVD-DATE	Letters Of Administration Order Received On Date
APPMNT-LOC-NAME	Appointment Location Name
CA-ENTITY-ADDR	Case Contact Address
CA-ENTITY-CITY	Case Contact City
CA-ENTITY-CNTY	Case Contact County
CA-ENTITY-COMMENTS	Case Contact Comments
CA-ENTITY-EMAIL	Case Contact Email
CA-ENTITY-FAX	Case Contact Fax
CA-ENTITY-OTHER-NAME	Case Contact Other Name
CA-ENTITY-PHONE#	Case Contact Phone Number
CA-ENTITY-SPECIALITY	Case Contact Speciality
CA-ENTITY-STATE	Case Contact State
CA-ENTITY-SUBSPECIALITY	Case Contact SubSpeciality
CA-ENTITY-SUFFIX	Case Contact Suffix
CA-ENTITY-TYPE	Case Contact Type
CA-ENTITY-ZIP	Case Contact Zip
CC-ADJ-ADDRESS-BLOCK	Counter Claim Adjuster Address block
CC-ADJ-ADDRESS-HORIZ	Counter Claim Adjuster Address Horizontal
CC-PL	Counter Claim Plaintiff Full Name
CONT-ADDR1	Contact Address1
CONT-ADDR2	Contact Address2
CONT-ADDR3	Contact Address3
CONT-ADDRESS-HORIZ	Case Contacts Full Address Horizontal
CONT-CITY-STATE-ZIP	Contact Address City, State Zip
CONT-DEAR	Contact Dear
CONT-FAX	Contact Fax

DEF-ADJ-ADDRESS-BLOCK	Defendant Adjuster Address block
DEF-ADJ-ADDRESS-HORIZ	Defendant Adjuster Address Horizontal
DEF-INS-GROUPNUMBER	Defendant Insurance Group Number
DEF-INS-IDNUMBER	Defendant Insurance ID Number
PL-ADJ-ADDRESS-BLOCK	Plaintiff Insurance Adjuster Address block
PL-ADJ-ADDRESS-HORIZ	Plaintiff Insurance Adjuster Address Horizontal
PL-AOE-ADDR2	Plaintiff Administrator of Estate Address2
PL-AOE-ADDR3	Plaintiff Administrator of Estate Address3
PL-AOE-ADDRESS-BLOCK	Plaintiff Administrator of Estate Address Block
PL-AOE-ADDRESS-HORIZ	Plaintiff Administrator of Estate Address Block Horizontal
PL-AOE-CITY	Plaintiff Administrator of Estate City
PL-AOE-CITY-STATE-ZIP	Plaintiff Administrator of Estate City State Zip
PL-AOE-CNTY	Plaintiff Administrator of Estate County
PL-AOE-FIRST-NAME	Plaintiff Administrator of Estate First Name
PL-AOE-LAST-NAME	Plaintiff Administrator of Estate Last Name
PL-AOE-NAME	Plaintiff Administrator of Estate Full Name
PL-AOE-PREFIX	Plaintiff Administrator of Estate Prefix
PL-AOE-STATE	Plaintiff Administrator of Estate State
PL-AOE-SUFFIX	Plaintiff Administrator of Estate Suffix
PL-AOE-ZIP	Plaintiff Administrator of Estate Zip
PL-INS-GROUPNUMBER	Plaintiff Insurance Group Number
PL-INS-IDNUMBER	Plaintiff Insurance ID Number
PL-NF-ADJ-ADDRESS-BLOCK	No Fault Adjuster Address block
PL-NF-ADJ-ADDRESS-HORIZ	No Fault Adjuster Address Horizontal
PL-NF-INS-GROUPNUMBER	No Fault Insurance Group Number
PL-NF-INS-IDNUMBER	No Fault Insurance ID Number
PR-ATTY-FAX	Prior Attorney Fax
SET-OTHER-FEE	Firm Other Fee

New/Updated Reports

- Fees Outstanding – Added additional report parameters/filters.
- SOL Report – Added case group filter and Sort By options:



- Lead Analysis Report – added an option to show only retained cases:

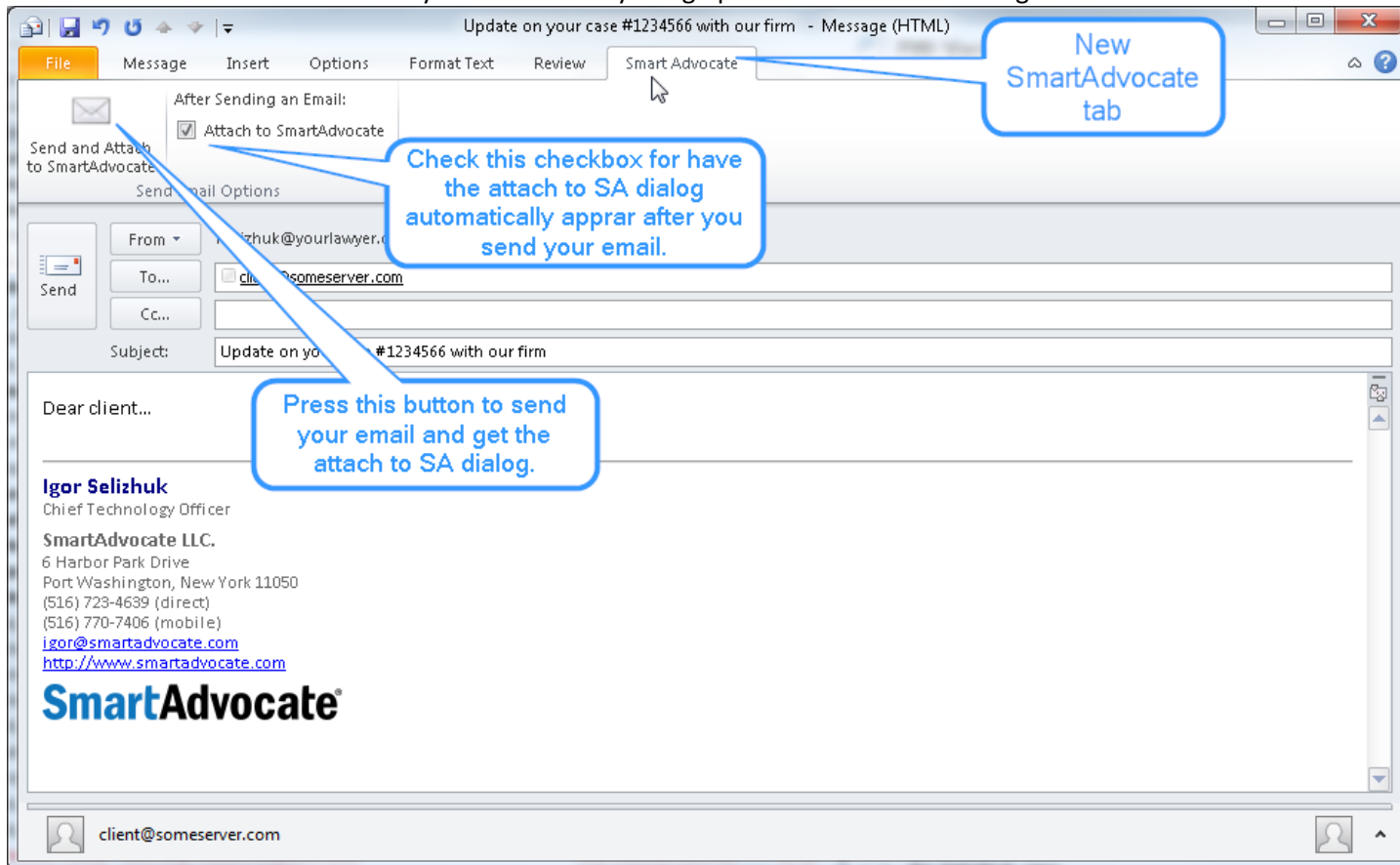
The screenshot shows a window titled "Lead Analysis Report" with a light blue background. It contains three filter fields:

- From:** A text input field containing "10/13/2015" with a calendar icon to its right.
- Advertisement Campaign:** A dropdown menu with "All" selected and a downward arrow icon.
- Show Only Retained Cases:** A dropdown menu with "Yes" and "No" options. The "No" option is highlighted in blue, and a mouse cursor is pointing at it.

- Lien Report – Current payoff Amount and Negotiated/Final Lien Amount columns were added.

Other Changes

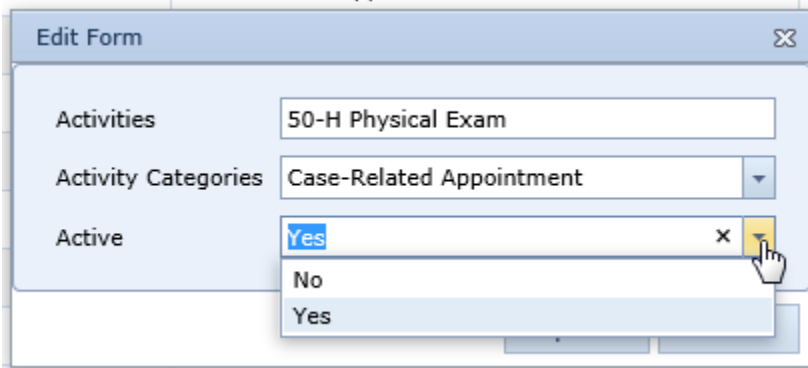
- Case Documents page will now remember column sorting set by user.
- SA Outlook add-in now has an ability to attach multiple emails at the same time.
- SA Outlook add-in now has an ability to automatically bring up the “Attach to SA” dialog after email is sent:



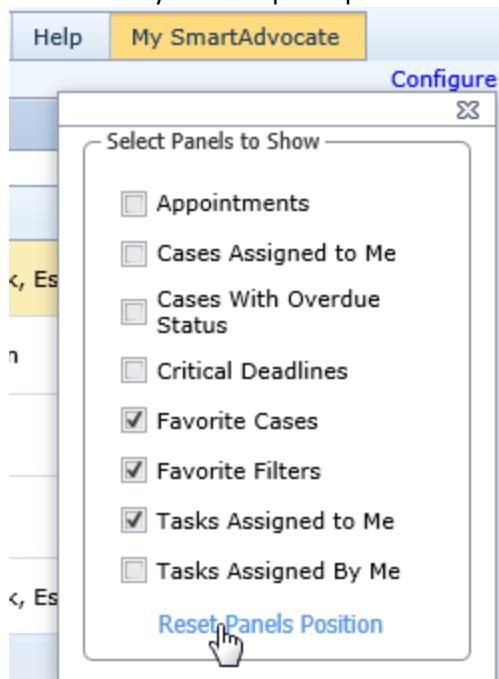
- When copying documents, document direction will be copied along with other document properties.
- Added ability to enable changing case open date. This is disabled by default and can only be enabled directly in the database.
- Added ability to save copy of Microsoft Word document as PDF directly on the Documents page:

Category	Description	Date	Sub-Category
Plaintiff	Letters - Case	11/11/2015 2:55 PM	Letter
		11/11/2015 11:55 AM	
		11/11/2015 11:55 AM	
Discovery		11/10/2015 3:37 PM	Judicial Intervention - Request/filed
Expert		11/9/2015 5:09 PM	Invoice

- Added ability to deactivate unused activity types (Picklist Maintenance page)



- Added support for Canadian Zip codes.
- Custom merge codes can now be marked as archived.
- Builder merge codes can now be deleted.
- Added ability to delete documents from Tools->Document Search page.
- Added ability to reset panel positions on the My SmartAdvocate screen:

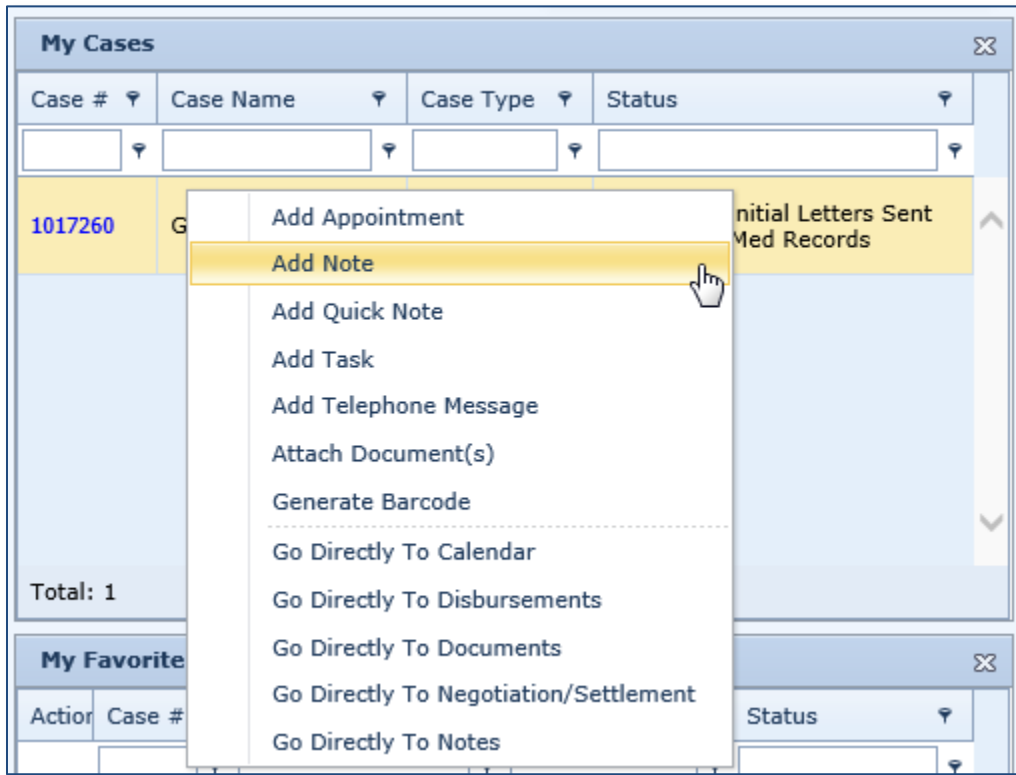


- Filter by Firm status was added to Project Details page.
- Organization (Employer) column was added to Individual Contact Search results page. New column is hidden by default and can be added using Show/Hide Columns button.
- Contact card page was updated to show primary phone and primary address on top of the grid.
- Group number and ID number fields were added to insurance company record:

Policy Number	WL123456	Claim Number	111111111
Group Number		ID Number	
Policy Start Date		Policy End Date	

- Added new contact card relationships: Guardian-Ward and Administrator of Estate - Decedent.

- Context menu was added to My Cases and My Favorite Cases panels on the My SmartAdvocate screen:



- Mother's Maiden Name field was added to the Contact Card page.