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
 <u>https://chrome.google.com/webstore/detail/sadocumentextension/ofcdbngfnpdlmdligcclbkihfbahdnph?hl=en-US</u>
- 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:

👩 Note 🏾 🌇 Quick Note	e 👸 Message	10 Appointment	🗞 Task [0	Case Reports
1017260 - Gomez v. Jo	nes	Auto-Port A	uthority & City	(Care) is to Send	Passenger) 02/1 Text

Individual text message dialog:

Send Text	X
To:	Smith, John - (P)-Operator 🔹
Phone number:	(516) 555-7406
Text:	
This is a test me	ssage]
	✓
Characters remai	ning: 137
	Send Cancel

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):

Recent Cases	r Ca	ise Wizard	Case	Browse	e Conta	cts 🔻	Dashboa	rds 🔻		
Mass Update	- 9	Save Filter T	o Favori	ites						
Add Note		ere to group	ere to group by that column							
Add Staff Change Status		FCase Nam	ne	-#Inc	ident Date	≁ ■Cas	e Open Dat	≁ ■Case		
Generate Docu	ment		Ŷ		▼ 9		▼ 9			
Generate Text	վեր	v. c)oe			8/24/2	2015	8/24/20		
Reassign Adjus	ter	Congesting.	<i>.</i>							
Reassign Judge		Social Secu Administrat	rity ion			8/24/2	2015	8/24/20		
Reassign Role		Autimiscial								
Reassign Staff		v.	Doe			8/24/2	2015	8/24/20		
Remove Staff						-,,		-, - 1, 20		

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

Date	Staff	Ŷ	Notes			Туре 📍
Ŷ		Ŷ		×	Ŷ	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:

Document Type	List of documents
🚔 All	Select Template Name
📄 🚖 Favorites	
🛁 Affidavits	
🛁 Affirmations	🕷 uSA Test - BP3
🙈 Arbitration	
🔎 Authorizations	1TEST-JC
🛁 B/P Responses	1TEST-SA
🛋 Closina Stmt	

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

Gener	ate document(s)	for case : Case Numb	er: 1017260	23
Document Description:				
1SA Test - BP3				\sim
From:	•	то:	•	Our Firm
Keep Merge Codes with E	mpty Values			
7	Generate	Generate & Close	Check Merge Codes	Cancel
	Selected temp	late : 1SA Test - BP3.	locx	

- 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:

Please select Wo	rkPlan assignment			23
WorkPlan :	New Case Opening Plan - Medical Malpractice	e	T	
Case Status :	Please select cases, that will get this workflow a Pre-Lit 0 Wew Case - Initial Letters to be Se	assigned. ent	•	
Case Type :	Med Mal - Not Death		-	
		Update	Cancel	

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

Referral Source(s): County(s): From: 10/13/2015	Case Type(s): Zip Code(s): Clear Filters Apply Filters	Show only retained
Little Falls Vest Caldwell Montclair Mont	Clear Filters Apply Filters Case#:5019544 Fr V. Doe Opened at 10/16/2015 11:25:02 AM Plaisiff. Clear Filters Apply Filters Apply Filters Fort Salonga Huntington Smithtown Station Station	Terryville Long Island Farmingville
West Grange Nutley North Bergen Livingston Bloomfield Union City East East Orange 493 New York 6980 Maplewood Newark 05-18-9 Hoboken 2 Immit 70 Irvington 1 Jersey City 207	Viliston Park Jericho Plaintuit Dix Hills Hauppauge 11365 Vest Hills Dix Hills Central Islip Searingtown Jericho Plaintylew Go Brentwood Williston Park Dicksville (135) Deer Park Brentwood Williston Park Dicksville (135) Deer Park Islip Terra Garden City Levittown West Islip Islip Elimont Hempstead Massapequa West Babylon West Hempstead Massapequa Lindenhurst Grent South Bay	e Medford North Patchog East Patchogue Sayville

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:

Sort By	Date SOL Type And Plaintiff SOL Type And Defendant	5	
	SOL Type And Date		1

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

Lead Analysis Report						
From	10/13/2015					
Advertisement Campaign	All					
Show Only Retained Cases	Yes S					

• 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:

😰 🔄 🧐 😈 🐟 🗇 🖃 Update on your case #1234566 with our firm - Message (HTML)	
File Message Insert Options Format Text Review Smart Advocate Smart Advocate	۵ 🕜
After Sending an Email:	
Send and Attach to SmartAdvocate	
to SmartAdvocate Check this checkbox for have	
Send vail Options the attach to SA dialog	
From - inducation action and your email.	
Send To Com someserver.com	
Subject: Update on yo #1234566 with our firm	
Dear client Press this button to send your email and get the attach to SA dialog. Igor Selizhuk Chief Technology Officer MartAdvocate LLC. 6 Harbor Park Drive Port Washington, New York 11050 (516) 773-4639 (direct) (516) 770-7406 (mobile) isor@smartadvocate.com http://www.smartadvocate.com SmartAdvocate.com	
client@someserver.com	Ω.

- 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	Ŷ	Description		Date 🔻	Sub-Category 🕈
	٩		۴	▼ 9	Ŷ
Plaintiff	C	Letters - Case)pen	nobile	11/11/2015 2:55 PM	Letter
	C	opy opy as PDF		11/11/2015 11:55 AM	
	E	dit Properties	n LLP - sz	11/11/2015 11:55 AM	
Discovery	D	oownload Ipload	5A	11/10/2015 3:37 PM	Judicial Intervention - Request/filed
Expert	D	elete	n LLP	11/9/2015 5:09 PM	Invoice

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

Edit Form	x	
Activities	50-H Physical Exam	
Activity Categories	Case-Related Appointment	1
Active	Yes ×	1
	Yes	

- 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 form Tools->Document Search page.
- Added ability to reset panel positions on the My SmartAdvocate screen:

Help	My SmartAdvocate
_	Configure
	23
	Select Panels to Show
	Appointments
	Cases Assigned to Me
<, Es	Cases With Overdue Status
n	Critical Deadlines
	Favorite Cases
_	Favorite Filters
	Tasks Assigned to Me
. Es	Tasks Assigned By Me
, La	Reset Panels Position

- 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	11111111
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:

My Cases			23
Case # 🕈	Ca	se Name 🕈 Case Type 🕈 Status	٩
Ŷ		Ŷ . Ŷ	Ŷ
1017260	G	Add Appointment nitial Letter Med Record	rs Sent
		Add Note	
		Add Quick Note	
		Add Task	
		Add Telephone Message	
		Attach Document(s)	
		Generate Barcode	
		Go Directly To Calendar	Ť
Total: 1		Go Directly To Disbursements	
My Favori	te	Go Directly To Documents	23
Action Case	#	Go Directly To Negotiation/Settlement	•
Action Case	#	Go Directly To Notes	т Ф

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