

SmartAdvocate Release Notes (v2017.10.03)

These release notes cover updates and new features added to the SmartAdvocate software between March 2017 and October 2017.

Important Notes

This release of SmartAdvocate, like so many of our past releases, introduces hundreds of changes that will make your practice more productive and efficient.

Here are some of the highlights:

- Beta version of the Client Portal is available in this release.
The portal will allow your clients to see relevant information about their cases, at any time and from any device. The portal has a case dashboard that provides access to the case calendar (including upcoming appointments), messages, documents, contact information and case timeline. You decide what information you want your clients to see and the portal populates the client's screen with that information from your SmartAdvocate database.
- Case Menu customization capabilities were enhanced with ability to rename items (in addition to ability to hide and reorder items, which was introduced in the previous release).
- Critical Deadlines and Statutes of Limitations can now be pushed to users Outlook calendars as standard Outlook calendar appointments.
- Over 100 new merge codes have been added.
- Beta version of sending emails using Outlook instead of embedded SmartAdvocate email client.
- Ability to lock some of the users (based on permissions groups) from changing certain types of contact cards. Individual contact cards can also be locked.
- This version adds ability to lock individual cases. The permission to see locked cases can be set at the user group level.
- Document upload control now supports Drag and drop from your hard drive and flash drives.
- Ability to control users' access to social security numbers (Allow access to SSN, Last 4 + Allow entry, Allow access to SSN (Last 4), No SSN access).
- Option to display Plaintiff's "Avatar" on the Case Summary screen.
- Option to display Contact's "Avatar" on the brief contact info panel.
- New texting partner MessageMedia can deliver multimedia message (pictures) to SmartAdvocate in addition to plain text message.

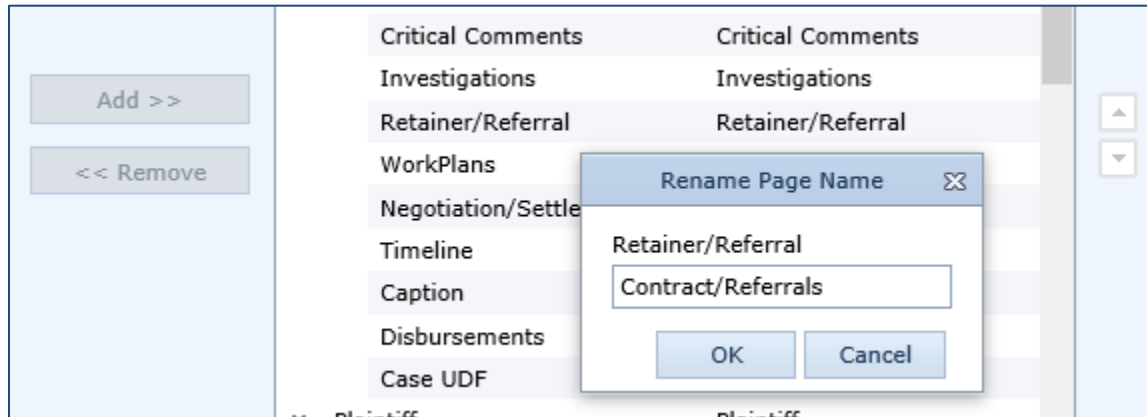
Integrations New and Previously Available

- **CallFire** – Texting Service. Send and receive text messages directly in SmartAdvocate.
<http://www.callfire.com>
- **Deitz Court Reporting** – Court reporting services. Receive deposition transcripts directly in SmartAdvocate.
<http://deitzcourtreporting.com/>
- **Diamond Reporting & Legal Video** – Court reporting services. Receive deposition transcripts directly in SmartAdvocate.
<http://www.diamondreporting.com/>
- **eLaw** – eDocket, eCalendaring, Calendar e-watching and e-copying Service. Get court appointments directly to your SA (and Outlook) calendar.
<http://www.e-law.com/>
- **Intake Conversion Experts** - Experts in Legal Intake and Lead Conversion. Get new cases created from ICE leads automatically.
<http://intakeconversion.com>
- **inSync** –<http://www.insynclitigation.com/>
- **Legal Intake Professionals** – Legal Answering Service & More. Get new cases created from LIP leads automatically.
<http://www.legalintake.com/>
- **MessageMedia** – Texting Service. Send and receive text messages directly in SmartAdvocate.
<http://www.messagemedia.com/>
- **National Record Retrieval** – Medical Records Retrieval Service. Request medical records directly from SA and get the received records automatically sent to SA.
<https://www.nationalrr.com/>
- **Ngage** – Website Chat Service. Get new cases created from Ngage leads automatically.
<http://www.ngagelive.com/>
- **Persist** – Automated Lead Communications Service. Follow-up on your leads using automatic calling, IVR, voicemails, email and text. Fully integrated with SmartAdvocate’s contacts, cases and statuses.
<http://forpersist.com/>
- **PM Legal** – Litigation Support Service. Handle trial prep, process service, investigations, surveillance and statements. Processes summons & complaints, affidavits of service, index numbers and more. Get documents and bills directly to you and automatically uploaded to SA. Get index number directly into SA.
<http://www.pmlegal.com/>
- **QuickBooks** – Accounting Software. Two-way synchronization for case disbursements (expenses).
- **Ring Central** – Phone System. Click-to-dial and screen-pop supported with Ring Central client software running on workstation.
- **XeeBee** - Medical Records Retrieval Service. Request medical records directly from SA and get the received records automatically sent to SA.
<https://xeebee.com/>

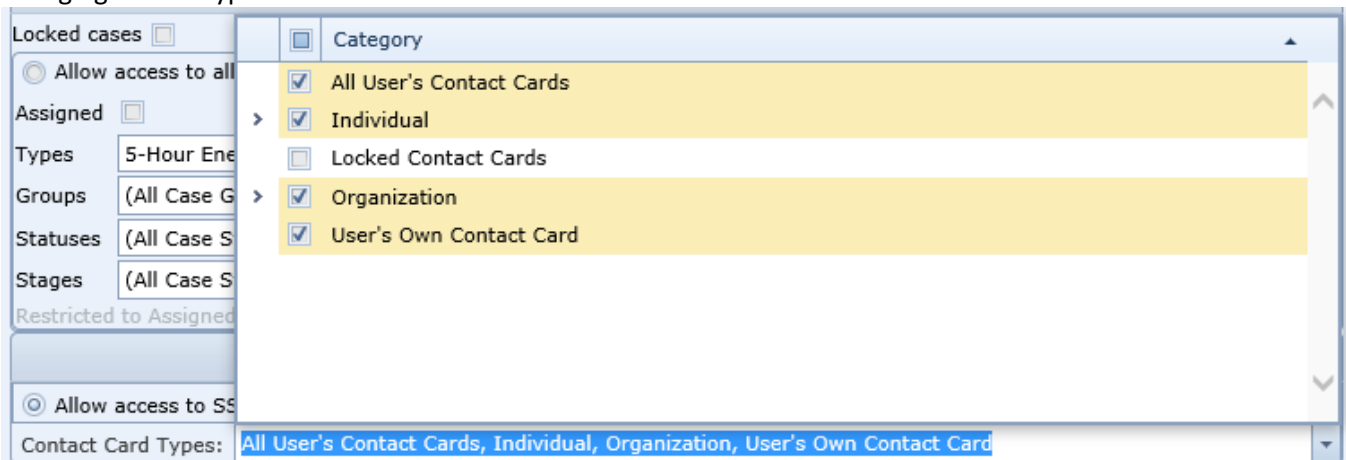
Note that most of the available integrations have a \$500 installation and configuration fee as well as 3rd party fees associated with them.

Updated Pages

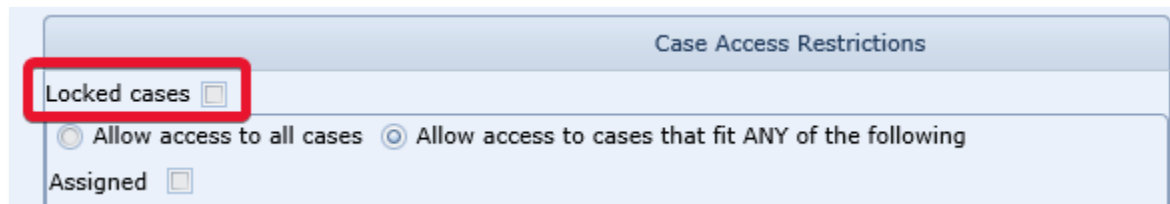
- Admin – Case Menu Configurator – Updated the look and added ability to rename pages.



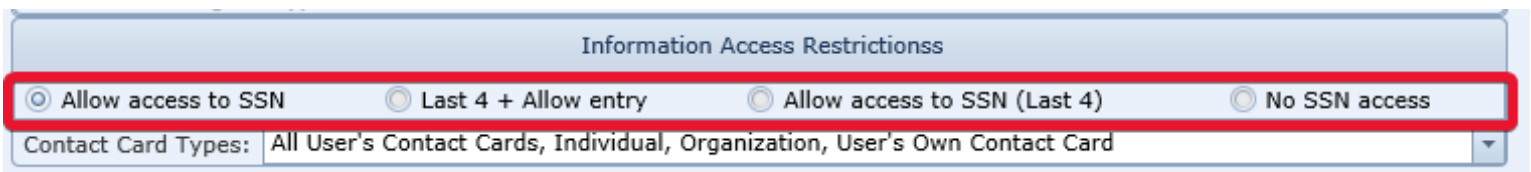
- Admin – Document Templates – Added ability to upload updated PDF template.
- Admin – Task Templates – Added
- Admin – User Permission Groups – Added ability to lock some of the users (based on permissions groups) from changing certain types of contact cards. Individual contact cards can also be locked.



- Admin – User Permission Groups – User permission group can be set to have or not to have access to locked cases.



- Admin – User Permission Groups – Added ability to control users' access to social security numbers.

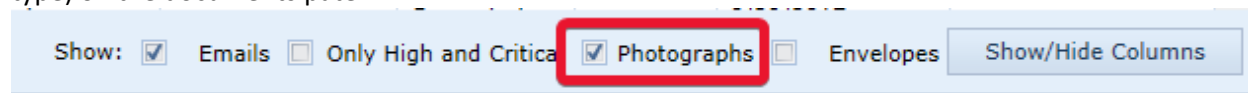


- Admin – Users – Added session information for users (Logged in, Last Login Time, Last Logout Time, Workstation Name, Last IP).
- Case Browse – New Test Search options were added – Defendant Attorney Comments, Defendant Attorney File Number.

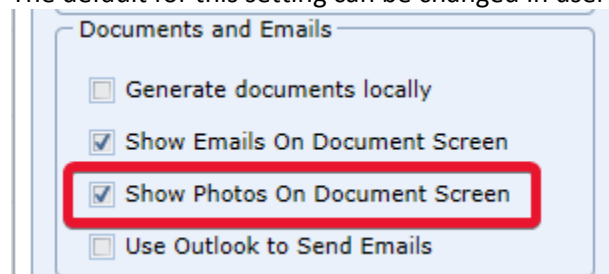
- Case Browse – New columns were added:

Office






- Referred Out Attorney
 - Sub Out Law Firm
 - Sub Out Attorney
 - Sub Status Date
 - Sub Status Days
 - Sub Status Comment
 - M1 Date
 - M1 Days
 - M1 Comment
 - M2 Date
 - M2 Days
 - M2 Comment
 - M3 Date
 - M3 Days
 - M3 Comment
 - Incident Facts
 - Next Deadline/SOL
 - Last Note (by Date)
 - Def. Ins. Limit (Low)
 - Def. Ins. Limit (High)
 - Defendant Adjuster
 - Pl. Ins. Limit (Low)
 - Pl. Ins. Limit (High)
 - Plaintiff Adjuster
 - Def. 3P Insurance Admin
 - Def. 3P Adjuster
 - Pl. 3P Insurance Admin
 - Pl. 3P Adjuster
 - All Staff
- Dashboards – Map Dashboard – Added “Show Only Open Cases” filter.
 - Dashboards – My Cases, Dashboards – Intake Follow Up Dashboard – Added Defendant column.
 - Defendant – Attorneys – Added ability to mark one of the Defendant’s Law Firms as primary.
 - General – Court – Right-click support to show contact information was added to the Judge/Clerk grid.
 - General – Court – Added ability to specify court caption document for each Docket/Index.
 - General – Critical Comments – Added ability to use different fonts and colors for Critical Comments.
 - General – Critical Deadlines – Fields on the SOL dialog were re-arranged and several fields were added.
 - General – Documents – Added new field and column: Delivery Method.
 - General – Documents – Added new columns: Modified By and Modify Date.
 - General – Documents – Added a new option to control visibility of the “Photographs” (document of the image type) on the documents pate.



The default for this setting can be changed in user preferences.



- General – Documents – Added a column with icons that visually identify types of the documents.


Create Document		Attach Document(s)		Clear Filter					
Drag a column header here to group by that column									
<input type="checkbox"/>	Icon	Description	Category	Sub-Category					
<input type="checkbox"/>		(Copy of) (Copy of) MRI	Medical	Records					
<input type="checkbox"/>		(Copy of) Med-Prvd visits DB	Other	Other					
<input type="checkbox"/>		(Copy of) (Copy of) ltr	Court	Compliance/Cert Conf. Order.					
<input type="checkbox"/>		(Copy of) 2012-10-13_13-59-26__DSC1996.jpg - uploaded by the user.	Other	Letter					
<input type="checkbox"/>		Case # 1017260 - Gomez v. Cheryl Ingram							

- General – Negotiation/Settlement – Added history

1017260 - Gomez v. Cheryl Ingram				Auto-Not Mun-Not Death	
Add Negotiation		Settlement View			
Date	Plaintiff	Staff	Negotiating With		
9/11/2017	Gomez, Melissa H.		Ins. Company: GEICO ed Motorist \$500,000/\$500,000 an, Scherezada S., Esq. Melissa H. Emily, Tel. (800) 645-7550		
6/19/2017	Gomez, Melissa H.		SEICO ed Motorist \$500,000/\$500,000 an, Scherezada S., Esq. Insured: Gomez, Melissa H.		

Record History			
Change Date	User Name	Event Name	Change Details
9/11/2017	Selizhuk, Igor V., Esq.	Update	Authorized: 15000.00 --> 14000.00 Comments from: test To: comment modified
9/11/2017	Selizhuk, Igor V., Esq.	Insert	Negotiating with: Insurance Co: GEICO Adjuster: Hobel, Emily Negotiation Date: 09/11/2017 Staff: Selizhuk, Igor V., Esq. Plaintiff: Gomez, Melissa H. Authorized: 15000.00 Demand: 30000.00 Offer: 0.00 Comments : test

- General – Negotiation/Settlement – Added ability to associate document(s) with the settlement record.
- General – Negotiation/Settlement – Added a warning when entered settlement is smaller than minimal settlement value set for the case or settlement is below the estimated value range set for the case.

Gross Settlement	<input type="text" value="\$1,000.00"/>		Check Received	Amount
Disbursements	<input type="text" value="\$0.00"/>	Warning: Settlement is less than minimal settlement value set for the case.		

- General – Retainer/Referral – Added ability to link retainer records with document(s).

- General – Summary – Added ability to lock individual cases.

The screenshot shows the 'Edit Case' window with the following details:

- Main Details:** A checkbox labeled 'Locked case' is highlighted with a red box.
- Case Name:** Gomez v. Cheryl Ingram
- Auto Update:** A checkbox.
- Type:** Auto-Not Mun-Not Death

- General – Summary – Added ability to add/modify/delete Critical Deadlines and SOLs directly from the Case Summary page.

Pending Critical Deadlines			Add Plaintiff SOL Add Defendant SOL Add Critical Deadline	
Selizhuk, Igor	No Fault(0 0 30)	10/1/2017		
Selizhuk, Igor	SOL(2 0 0)	8/31/2019		
Doe, John	SOL(3 0 0)	9/1/2020		

- General – Summary – Added ability to display primary plaintiff's "Avatar".

The screenshot shows the SmartAdvocate interface for case 5015345 - Robinson vs Scrooge. The 'Summary' tab is selected, and a plaintiff avatar is displayed. The litigation details are as follows:

Litigation	LIT 6 - Depositions
M1 - Case Rank	C - Average Case
M2 - Treatment	Specialist Needed

Below the litigation details, there is a link for 'Paid Advertising Smart Litigator' and a list of categories: Serious Injury, Other Plaintiffs, Bankruptcy, and Liens.

This functionality can be switched on or off on the Admin -> System Parameters page (UI Settings/Show a primary plaintiff avatar on Case Summary page).

- My SmartAdvocate – Added ability to modify/delete Critical Deadlines and SOLs directly from My SmartAdvocate page.
- My SmartAdvocate – Added attending staff column to Appointments panel.
- Plaintiff – Medical Providers – Added check to prevent duplicate entry of Plaintiff/Medical Provider pair.

The screenshot shows an error message dialog box with the following text:

Selected Medical Provider is already added for this Plaintiff. Please select a different plaintiff or different medical provider.

Closing in 27 seconds

Close

- Plaintiff – Medical Providers – Added ability to indicate if medical records are required for particular medical provider.

The screenshot shows a web form titled "Add/Edit Medical Provider". The form contains several input fields and checkboxes. The "Medical Records" dropdown menu is highlighted with a red border, and its options are: "Undecided", "Required", "Not Required", and "Pending Receipt". Other visible fields include "Plaintiff:" (Robinson, Terry-Ann), "Provider:" (Good Samaritan Memorial Hospital, 50 Main Street, White Plains), "Start Date:" (08/04/2014), "End Date:" (08/07/2017), "Hospital Chart/File #:" (12-12345678), and "Total Visits:" (4). There are also checkboxes for "Treatment ended:", "Expert:", and "Is Referred:".

- Plaintiff – Prior Injuries – Limit of 2000 characters for the Injury was removed.
- Tools – Mass Time Tracking Entry – New page was added. This page allows to enter time spent on multiple cases on a single page.

Mass Time Tracking Entry						
Mass change all activity to:						Apply
Case Number	Case Name	Last Access Date	Case Status	Action Type	Duration (hours)	Notes
5015345	Robinson vs Scrooge	9/12/2017 11:38 AM	LIT 6 - Depositions and Other Discovery Ongoing	Administrative	.50	
170110	Selizhuk -v- Doe	9/8/2017 12:22 PM	Pre-Sign 00 - New Lead	Document Review	1.00	
170042	Selizhuk -v- Doe	8/31/2017 1:07 PM	Pre-Lit 01- PI New Case - Initial Letters to be Sent	Court Appearance	3.00	Some notes
170106	Selizhuk -v- Doe	8/31/2017 12:38 PM	Pre-Sign 00 - New Lead			

New Merge Codes Added

- New type of the merge code was introduced– codes that can insert document associated with a record in SmartAdvocate. In this release we added COURT-COURT#-CAPTION merge code that inserts caption associated with particular Court/Court Number. We also added number of merge codes that can add signature of the staff member, for example CA-ATTY-SIGN will insert that document (from the contact card) that contains signature of the case attorney.

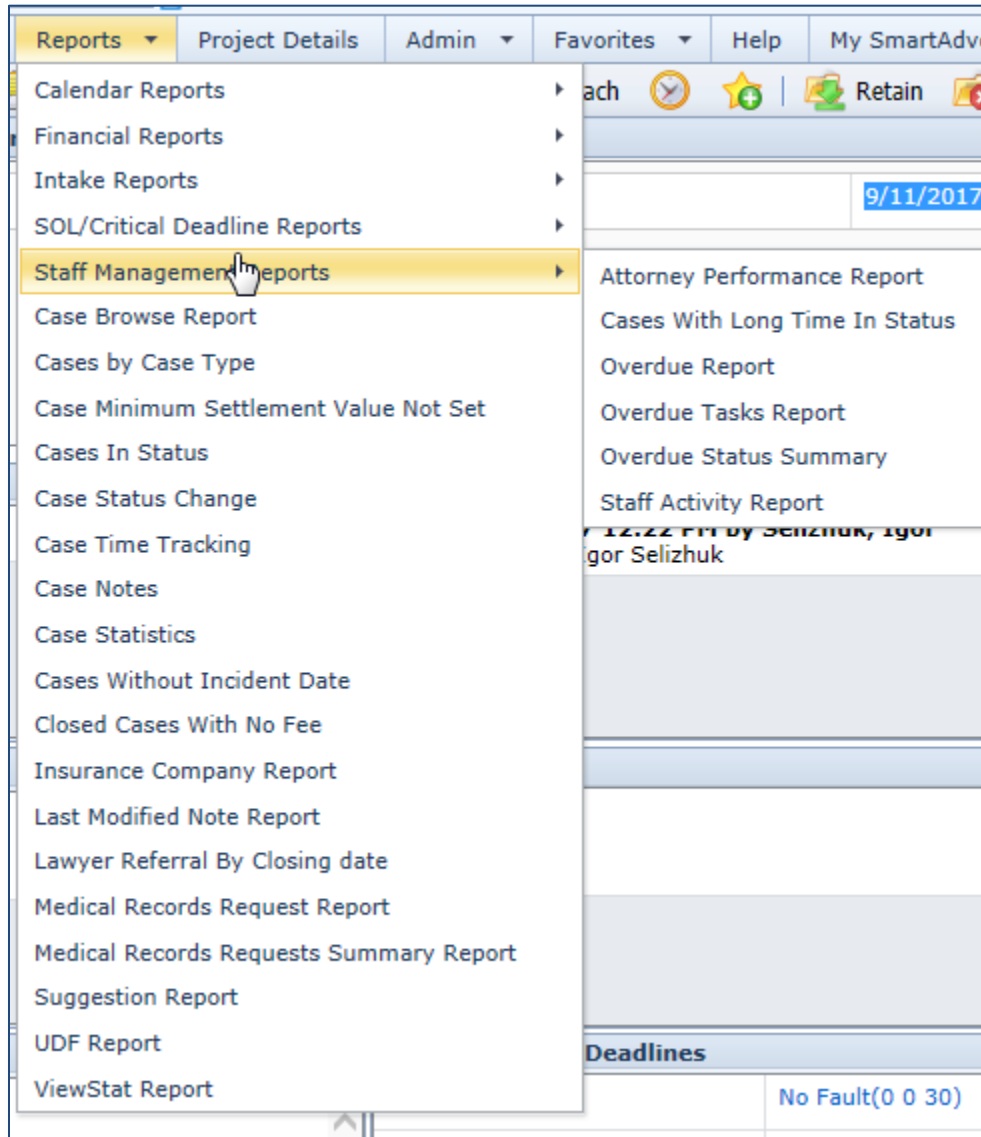
AUTO-COLOR	Vehicle Color
AUTO-COMMENTS	Vehicle Comments
AUTO-LICENCE#	Vehicle License Number
AUTO-MAKE	Vehicle Make
AUTO-MODEL	Vehicle Model
AUTO-OPERATOR	Vehicle Operator Full Name
AUTO-OPERATOR-ADDR1	Vehicle Operator Address1
AUTO-OPERATOR-ADDR2	Vehicle Operator Address2
AUTO-OPERATOR-ADDR3	Vehicle Operator Address3
AUTO-OPERATOR-ADDRESS-BLOCK	Vehicle Operator Address Block
AUTO-OPERATOR-ADDR-HORIZ	Vehicle Operator Address Horizontal
AUTO-OPERATOR-CITY	Vehicle Operator City
AUTO-OPERATOR-CITY-STATE-ZIP	Vehicle Operator City, State Zip
AUTO-OPERATOR-CNTY	Vehicle Operator County
AUTO-OPERATOR-STATE	Vehicle Operator State
AUTO-OPERATOR-ZIP	Vehicle Operator Zip
AUTO-OWNER	Vehicle Owner Full Name
AUTO-OWNER-ADDR1	Vehicle Operator Address1
AUTO-OWNER-ADDR2	Vehicle Operator Address2
AUTO-OWNER-ADDR3	Vehicle Operator Address3
AUTO-OWNER-ADDRESS-BLOCK	Vehicle Owner Address block
AUTO-OWNER-ADDR-HORIZ	Vehicle Owner Address Horizontal
AUTO-OWNER-CITY	Vehicle Owner City
AUTO-OWNER-CITY-STATE-ZIP	Vehicle Owner Address City, State Zip
AUTO-OWNER-CNTY	Vehicle Owner County
AUTO-OWNER-STATE	Vehicle Owner State
AUTO-OWNER-ZIP	Vehicle Owner Zip
AUTO-PLATE#	Vehicle Plate Number
AUTO-REGISTRANT	Vehicle Registrant
AUTO-STATE	Vehicle State Of Registration
AUTO-TYPE	Vehicle Body Type
AUTO-VALUE-BEFORE-ACCIDENT	Vehicle Value Before The Accident
AUTO-VIN#	Vehicle VIN Number
AUTO-YEAR	Vehicle Year

CA-ATTY-SEL-CNTY	Case Attorney County Select
CA-ATTY-SEL-EMAIL	Case Attorney Email Select
CA-ATTY-SEL-FAX	Case Attorney Fax Select
CA-ATTY-SEL-FIRST-NAME	Case Attorney First Name Select
CA-ATTY-SEL-INIT	Case Attorney Initials Select
CA-ATTY-SEL-LAST-NAME	Case Attorney Last Name Select
CA-ATTY-SEL-NAME	Case Attorney Name Select
CA-ATTY-SEL-PHONE#	Case Attorney Phone Select
CA-ATTY-SEL-PREFIX	Case Attorney Prefix Select
CA-ATTY-SEL-ROLE	Case Attorney Firm Role Select
CA-ATTY-SEL-SIGN	Case Attorney Signature Select
CA-ATTY-SEL-STATE	Case Attorney Firm State
CA-ATTY-SEL-SUFFIX	Case Attorney Suffix Select
CA-ATTY-SEL-TITLE	Case Attorney Firm Title Select
CA-ATTY-SIGN	Case Attorney Signature
CA-CALENDAR-INFO-DETAILED	Calendar Appointments Detailed Information in case
CA-CM-SIGN	Case Case Manager Signature
CA-ENTITY-EMPLOYER	Case Contact Employer
CA-PARA-SIGN	Case Paralegal Signature
CA-STAFF-SIGN	Case Staff Signature
COURT-COURT#-CAPTION	Court Caption
DEF-AUTO-OPERATOR-FIRST-NAME	Defendant Vehicle Operator First Name
DEF-AUTO-OPERATOR-LAST-NAME	Defendant Vehicle Operator Last Name
DEF-AUTO-OWNER-FIRST-NAME	Defendant Vehicle Owner First Name
DEF-AUTO-OWNER-LAST-NAME	Defendant Vehicle Owner Last Name
INC2-DATE	Date Of Incident2
INC2-DATE-FULL	Date Of Incident2 In Full Date Format
INC2-DAY	Incident2 Day
INC2-DAYOFWEEK	Incident2 Day of the Week
INC2-MONTH	Get Month Of Incident2
INC2-MONTH-EXT	Incident2 Date Month Expanded
INC2-STATE	Incident2 State
INC2-STATE-EXP	Incident2 Expanded State
INC2-TIME	Incident2 Time
INC2-YEAR	Incident2 Date Year
INC3-DATE	Date Of Incident3
INC3-DATE-FULL	Date Of Incident3 In Full Date Format
INC3-DAY	Incident3 Day
INC3-DAYOFWEEK	Incident3 Day of the Week
INC3-MONTH	Get Month Of Incident3
INC3-MONTH-EXT	Incident3 Date Month Expanded

INC3-STATE	Incident3 State
INC3-STATE-EXP	Incident3 Expanded State
INC3-TIME	Incident3 Time
INC3-YEAR	Incident3 Date Year
INC4-DATE	Date Of Incident4
INC4-DATE-FULL	Date Of Incident4 In Full Date Format
INC4-DAY	Incident4 Day
INC4-DAYOFWEEK	Incident4 Day of the Week
INC4-MONTH	Get Month Of Incident4
INC4-MONTH-EXT	Incident4 Date Month Expanded
INC4-STATE	Incident4 State
INC4-STATE-EXP	Incident4 Expanded State
INC4-TIME	Incident4 Time
INC4-YEAR	Incident4 Date Year
MED-PRVD-BILL-DATE-AMOUNT-LIST	Medical Provider List of Bill Dates with Amounts
OFFICE-NAME-OF-CONT	Office Contact Card Name
PL-AOE-PHONE#	Plaintiff Administrator of Estate Phone Number
PL-AUTO-OPERATOR-FIRST-NAME	Plaintiff Vehicle Operator First Name
PL-AUTO-OPERATOR-LAST-NAME	Plaintiff Vehicle Operator Last Name
PL-AUTO-OWNER-FIRST-NAME	Plaintiff Vehicle Owner First Name
PL-AUTO-OWNER-LAST-NAME	Plaintiff Vehicle Owner Last Name
PL-MRMRS-LAST	Mr. and Mrs. Plaintiff Last Name
PL-SOL-DATE	Plaintiff Statute Of Limitations Date
PL-SOL-DATE-COMPLIED	Plaintiff Statute Of Limitations Complied Date
PL-SOL-PLAINTIFF-NAME	Plaintiff Statute Of Limitations Plaintiff Name
PL-SOL-TYPE	Plaintiff Statute Of Limitations Type
SET-FEE-FRACTION	Settlement Attorney Fee Percentage/Fraction
SET-REF-FEE	Referring Firm/Attorney Fee
SET-WITH-NAME	Name of the Company Settled with

New/Updated Reports

- Reports menu was re-organized to accommodate new reports and provide better organization.



- Attorney Performance – New Report Added.

Attorney Performance Report [Subscribe](#)

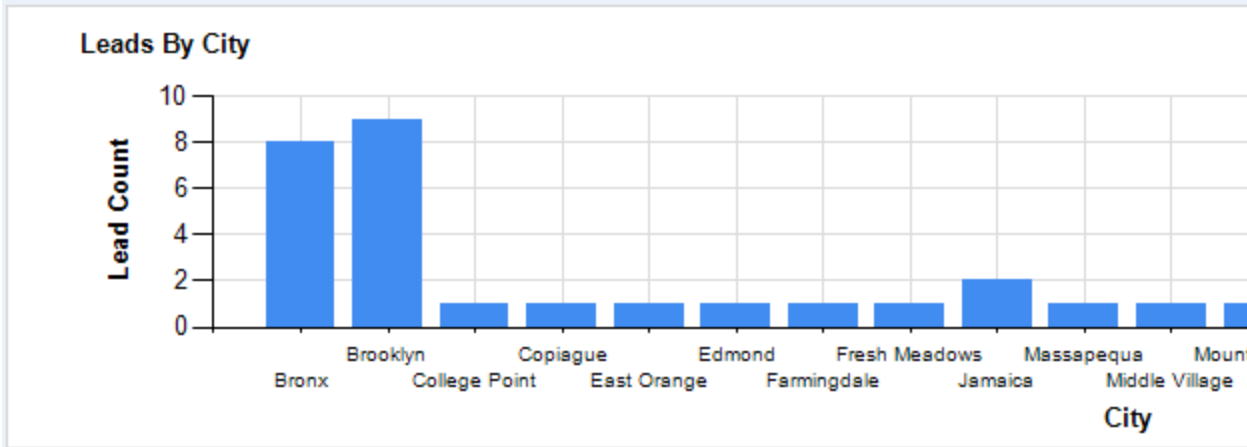
Staff: From Date: To Date: Days Back From: Days Back To:

1 of 1 | 100% | Find | Next

Attorney Performance Report 9/1/2017 - 9/12/2017

Staff	Total Cases	Settled Without Check	Minimum Value Not Set	Case Status Changes	Adjourned/Cancelled Appointments	Client Contact Overdue	Attorney File Review OverDue	Supervisor File Review OverDue
	2998	26	2998	78	0	2192	2919	2998
	1745	15	1745	107	0	1464	1625	1707
	102	6	51	4	2	14	39	99
	47	6	11	2	2	15	18	47
Total	4892	53	4805	191	4	3685	4601	4851

- Calendar Report Advanced – Added new columns: Referral source (all combined), Days in status, Case Open Date, Case Status.
- Insurance Company – Added parameter to search Adjuster name.
- Last Modified Note Report – Added Note Type filter.
- Lead Analysis Report – Added lead split by City and parameter to include or not include “Other” column.



- Medical Records Requests Summary – new report added. This report provides high level summary view on the medical records requests.

Medical Records Requests Summary	
From: 1/1/2017	
New Requests	
Today	56
This week	56
This month	82
Total	7257
Received Medical Records	
Today	34
This week	34
This month	0
Total	3328
Pending Requests	
Total	3033
Overdue	1948
Total Requests in Other Statuses	
Canceled	330
Rejected	532
Reject Pending	34

- Overdue Status Summary – New report added.

OverDue Status Summary

Stage: Mass Tort:
 Case Group: Office:

1 of 1 100% Find | Next

Overdue Status Summary Date:9/12/2017

Stage	Case Status	Maximum Number of Days Allowed In Status	Number of Cases Exceeding Maximum Days
Pre-Lit	Pre-Lit .1 - Retainer rec'd - WAITING Photos	15	
	Pre-Lit .2 - Retainer Received-WAITING FOR POLICE RPT	30	3
	Pre-Lit .3 Under Consideration - Retainer/Police Rpt REC'D	15	1
	Pre-Lit 0 - New Case - Initial Letters to be Sent	4	16
	Pre-Lit 1 - Information Missing from File	90	23
	Pre-Lit 2 - Initial Letters Sent Out - Req. Med Records	119	124
	Pre-Lit 3 - Client Completed Treatment	60	28
	Pre-Lit 4 - All Medical Records Received	60	17
	Pre-Lit 5 - One more item that we need before we can settle case	60	3
	Pre-Lit 6 - Case Ready to Settle	60	40
	Pre-Lit 7 - Case Ready to be Filed	60	3

- SOL Report – Added M1, M2, M3 (sub-statuses) columns to the report.
- Staff Activity Report – added columns to indicate number of Deleted Documents and Deleted Notes.

Other Changes

- Critical Deadlines and Statutes of Limitations can now be pushed to users Outlook calendars as standard Outlook calendar appointments. This functionality can be configured through new administrative page “Notifications Setup”

SmartAdvocate Cases: Open Closed All Plaintiff / Case #

Recent Cases ▾ Case Wizard Case Browse Contacts ▾ Dashboards ▾ Office Calendar Tools

Notifications Setup

Critical Deadlines and Statutes Of Limitation

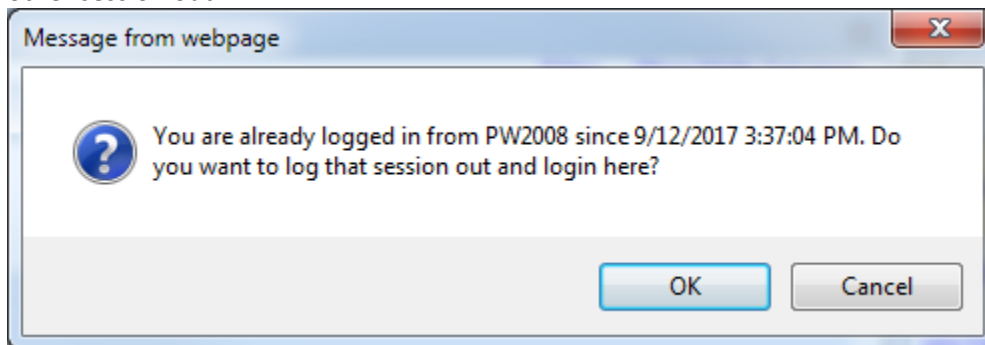
- Email Calendar Events for Critical Deadlines
- Email Calendar Events for Statutes Of Limitation

Calendar Event Default Time: 9:00 AM ▾

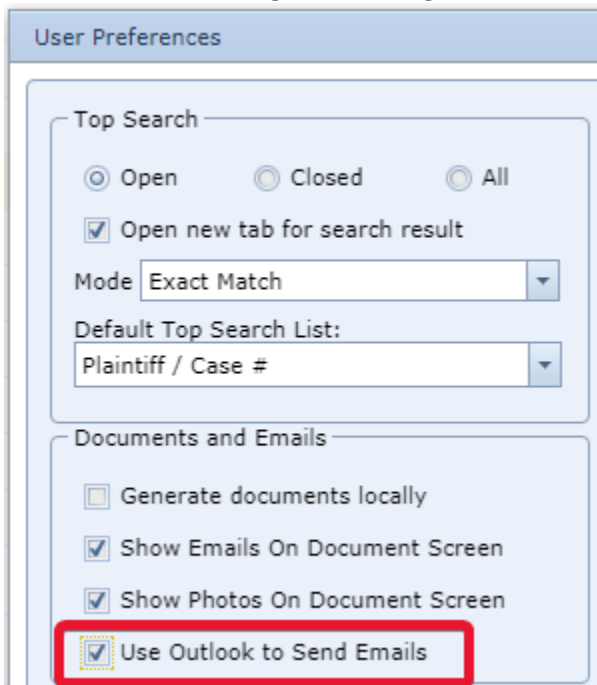
Select Case Roles to be Notified:

- Managing Attorney
- Managing Partner
- Non Party Witness
- Nurse Consultant
- Paralegal
- Primary Attorney
- Primary Paralegal
- Staff

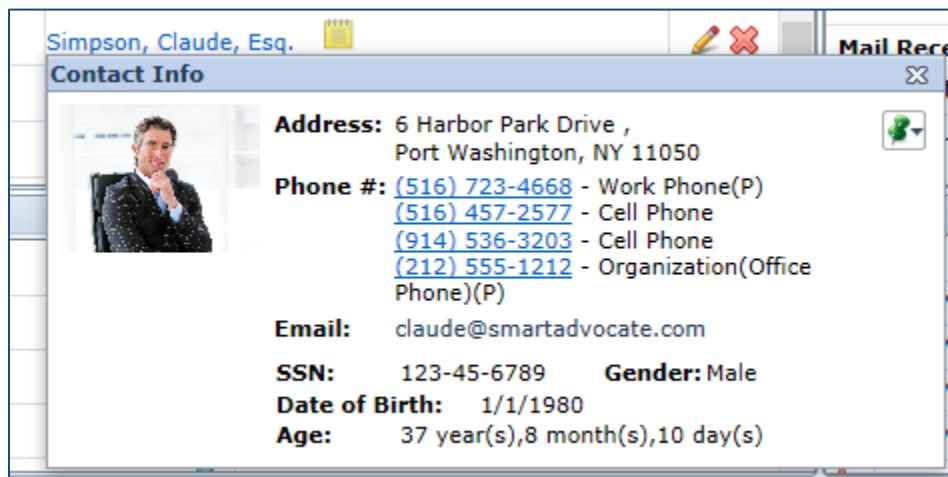
- Users logging in from different location without logging out first will now get a warning and an option to log the other session out.



- Beta version of sending emails using Outlook instead of embedded SmartAdvocate email client.

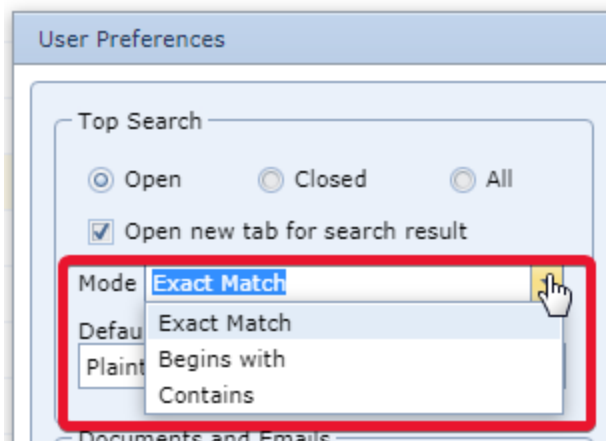


- Added ability to display contact's "Avatar" on the brief contact info pop-up.



This functionality can be switched on or off on the Admin -> System Parameters page (UI Settings/ Show a contact avatar on Contact Info popup (right-click)).

- Added preference for top search mode. Now you can specify how the search will work if you enter the name without wildcards. If you search for 'Smith' "Exact Match" will return only plaintiffs with the last name Smith. "Begins with" will return plaintiffs with the last name Smith as well as Smithson. "Contains" will return plaintiffs with the last name Smith, Smithson and Goldsmith.

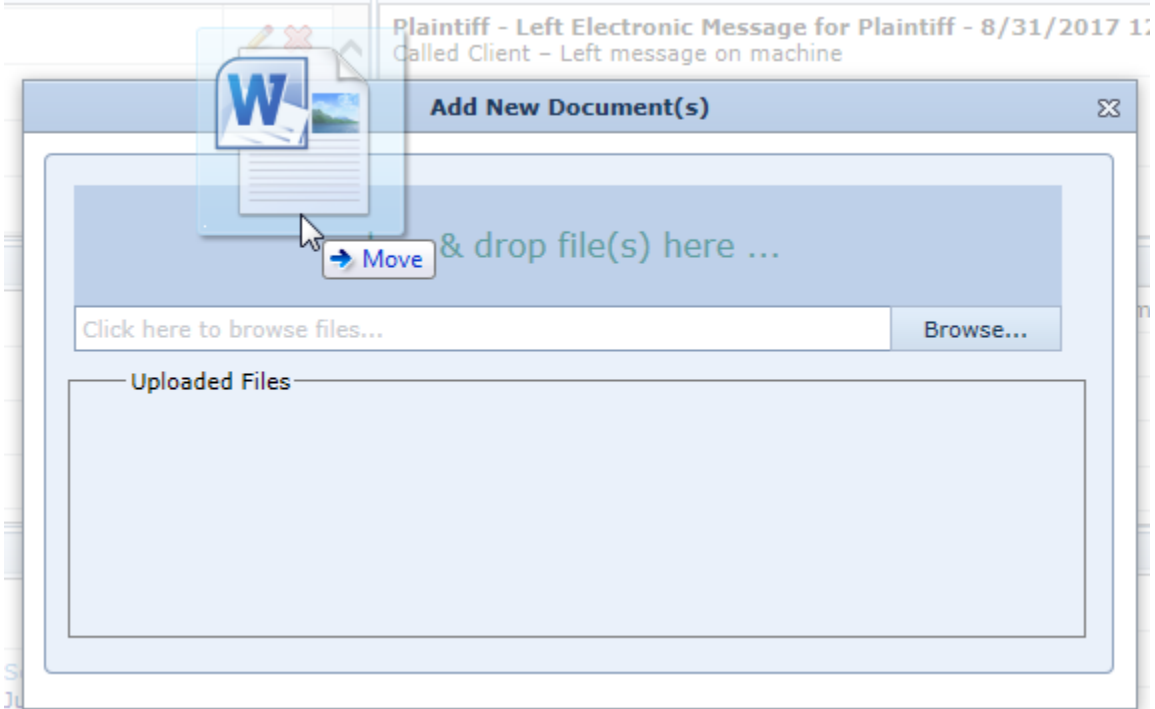


- Outlook plugin was improved to detect the case number in the email subject without need for specific prefix.

- Social Security numbers are now encrypted in the database.
- Case number format can now contain prefixes and suffixes. For example your case number can be generated in the following format: SA-yy00000.
- Fields for Driver's license, State, ID and ID State were added to individual contact card.
- Add Task Dialog check box that controls sending of the emails will remember its state between dialog uses.
- Optional task completion note prompt can now be controlled in Admin -> System Parameters (Internal).

Group Description	Parameter Description	Selected Value
task		
Task Settings	Prompt For Optional Note Upon Task Completion	True

- Document upload dialog now supports Drag-and-Drop functionality.



- Notification emails (document attached, SOL changed, etc.) were updated to include more case information.
- Added ability to limit the size of the displayed notes. Notes that are too big will be converted to text only and number of displayed characters will be limited.

This behavior can be configured in the system parameters.

	note		
Notes	Maximum number of plain text characters to display in the Notes grid.	20000	
Notes	Maximum number of characters in the Rich Text note that will be displayed as Rich Text. Notes with more characters will be displayed as plain text notes in the grid.	30000	