



Case Manager V6.3 - Release Notes

These release notes list the changes made to the 6.3 version of Case Manager.

New Features

Please visit our Learning site for more detailed information on new features and improvements to Case Manager at <https://learning.casemanager.biz/web/WhatsNew/WhatsNew6-3.htm>

Summary of Key Features added to the 6.3 Release

- [Improved Rounding Options](#)
- [Global Time Zone](#)
- [New Auditing Capabilities](#)
- [Modern Authentication for Office365 email](#)
- [Pending referrals Integration with MedEbridge](#)
- [Xero Integrations Dashboard](#)
- [Merge Fields for Custom Columns](#)
- [New Office Add-in for document templates](#)
- [Bulk Import Payment Utility](#)

Other Enhancements

Key	Description
CM-4391	Group activities by date on invoices
CM-4275	New Formatted Test Notes open in popup window
CM-3919	Consultant cannot access restricted Case Information using the Global Search Tool
CM-3916	Consultant can upload common video files
CM-3692	Document Lock is invoked when editing a draft email
CM-3638	When locking a document for editing consultant sees document title
CM-3579	Admin can disable document preloading when switching cases
CM-3261	New Document Manager Installer
CM-3227	Support can rename Flag fields for customers
CM-3225	User Column Choices are not saved in Estimates Grid
CM-3215	Ability to include or exclude multiple charge codes in Invoice Generator
CM-3182	Consultant can select Modern Auth under User Options
CM-3123	Claiming.com.au : Update API from V1 to V2
CM-3095	Consultant sees warning in callout when an external file cannot be found in Document Storage



CM-3076	REST API : Improve error message when user is unauthorised
CM-3036	New Workflow trigger based on Estimate Start Date and End Date
CM-2770	Document Manager : Improve document locking
CM-2703	File upload animation is displayed on file Drag & Drop
CM-2697	Admin can configure options for Lists
CM-2670	Consultant can select Activity Cost that matches their Employee Service Type
CM-2669	Admin can create an Estimate for Multiple Service Types
CM-2659	Admin can configure visibility of Activities by Service Type
CM-2632	Web version, when case tabs don't show text, show text as tooltip
CM-2609	Convert large inline images to attachments when importing email
CM-2536	Consultant can see tooltip on custom fields
CM-2439	Set correct intermediary acceptance status when closing a case
CM-2417	Update User Options with new modern auth settings for EWS
CM-2384	Ability to add new items to dropdown menus
CM-2377	Changes to Case Contacts are not visible in View History
CM-2376	UI Changes to Auditing
CM-2373	Consultant sees message when trying to edit a binary document template
CM-2353	Update CM Windows UI to use new Email Configuration Options
CM-2297	Consultant can preview Document side by side to the Wizard
CM-2204	Make text field for text documents
CM-2150	Custom calculated column appears as a merge field option in document templates
CM-2048	Case Manager Web: Consultant can see record when external file has been edited
CM-1988	Improve Error Message when Sending a Test Email
CM-1893	System admin can verify Custom Fields changes are recorded to the audit table
CM-1875	System Administrator can disable Audit History
CM-1684	Export Binary Data to External Storage
CM-1664	Case Manager Web: Export all rows to excel from case list grid



Defects Fixed

Key	Description
CM-4612	Document error "The specified key does not exist"
CM-4424	Lock on Employee table causes timeout issues for ALL users accessing the same database
CM-4355	Clicking a document from the grid will show an error in Preview section if the document is already open
CM-4330	Case Manager does not use a signed version of NodaTime.dll
CM-4278	Consultant edits document without getting latest changes
CM-4274	Data grid auto scrolls back after user clicks a row
CM-4200	Medicare verifying details error
CM-4152	Invoice batch utility error - "Wait operation timed out"
CM-3909	Error message is missing text when attaching a locked case document to an email
CM-3842	Editing new document after adding a cost causes 'Document object has been modified by another user' error
CM-3840	Email content is not readable when Printing the Document List
CM-3834	Invoice Batch Utility : Unable to select item in grid
CM-3830	Drag&Drop Emails fails with "Exception information" warning
CM-3822	New Formatted Text document shows "Process cannot access the file" error
CM-3767	Consultant is unable to change the date in a DateTime Custom Field that is used in a Workflow task
CM-3746	Duplicate Key error shown when converting a document to PDF
CM-3713	Error message displayed when saving Draft email
CM-3621	Performance problems sending emails
CM-3596	Error when Printing Document or Selecting for Archive Download
CM-3586	Error message "Could not find part of the path .." when sending emails
CM-3584	User cannot unarchive a case
CM-3491	Invoice Batch Utility causes lag/slowness in windows
CM-3490	Custom Field value cannot be modified after upgrade
CM-3404	Unsafe characters in Titles is breaking Document Grid List
CM-3402	Email Attachments are being sent with the same content
CM-3375	System Options UI is very slow



CM-3352	Error is generated when Cancelling changes for a Formatted Text document
CM-3349	Errors appear in RTF editor when creating a formatted text document
CM-3331	"Process cannot access the file" error is displayed in email editor window
CM-3322	Email verification errors appear though settings are correct
CM-3321	Reply & Reply All on a Case Lock up Case Manager
CM-3315	"Invocation error" occurs when printing an Adjustment or Refund
CM-3267	Web Version - Payment UI is not displaying all fields
CM-3157	Object reference error is displayed after signing in
CM-3156	Consultant is unable to send email using EWS
CM-3155	REST API : Document Lock edit rule is being triggered on upload
CM-3098	Fixed width columns not working correctly
CM-3087	Workflow trigger Change From-To fields are not saved
CM-3043	An error occurs when creating a Workflow Trigger
CM-3021	Email CC Field is not populated when sending out invoices via email
CM-2979	User sees Authentication Timeout Warning after closing browser tab
CM-2942	Case Manager Mobile: New user receives an error after configuring a new endpoint
CM-2940	404 Error is displayed when accessing existing Formatted Text Document or email
CM-2905	The Save button is still disabled after changing the value in a Custom Field list
CM-2885	Send Test Email always shows error
CM-2879	Web version ignores inactive status when displaying items in custom field list
CM-2837	Templates search box doesn't clear after initial use
CM-2833	New Columns are not visible after selecting in the column chooser
CM-2819	File Manager Spinner appears after downloading a file
CM-2815	Layout Issue on New Invoice Form
CM-2812	Layout Issue on Appointment Form
CM-2807	Unable to Scroll on Workflow Designer form
CM-2805	Error encountered when Duplicating a case
CM-2803	Unable to save a custom user email signature for other employees
CM-2796	Add Cost > Uncaught TypeError: Cannot read properties of null (reading 'id')
CM-2757	Unable to load Saved List View
CM-2721	Error displayed when creating a new Estimate Template



CM-2683	An error occurs when adding locked Documents as attachments
CM-2682	Unable to delete attachment from a draft email
CM-2653	User sees a security exception when changing the Tax Code
CM-2644	Charge Code Truncation Issue
CM-2606	Workflow - unable to modify completion date for workflow task
CM-2575	Provide backward compatibility for EWS to still support Basic Auth
CM-2438	Requirements and Referral fields are not saved in Case Creation Wizard
CM-2328	Cost Description is truncated to 100 chars
CM-2306	Unable to delete Document Template - SQL Server error
CM-2201	Error displayed in console when Adding a new Case
CM-2198	NetSparker Vulnerability: jQuery out of date
CM-2197	NetSparker Vulnerability: Modernizer out of date
CM-2029	Error when adding a new cost to an existing estimate
CM-1987	Error when deleting Document
CM-1984	Duplicate emails sent when using the invoice batch utility
CM-1969	During Case Creation the security permission "Limit access to this case .." is not enforced
CM-1947	Error displayed after saving a change in Contacts
CM-1719	LockTransactions feature prevents cost being invoiced
CM-517	Bank Deposit form report SQL inefficient when large number of payments