



Case Manager

Version 7.0.0 – Release Notes

Release Date: February 2026

Document Version: 1.0

What's New in Version 7.0

Version 7.0 is a major release introducing Digital Signatures across both the Web and Windows clients, along with Document Custom Fields, UI improvements, and over 75 resolved defects.

Key Highlights

- **Digital Signatures** – Send, track, void, and manage digital signature envelopes directly from Case Manager on both Web and Windows. Includes credit management, draft envelopes, completion notifications, and document protection.
- **Document Custom Fields** – Custom Fields are now available when creating new document templates and for existing file types, on both Web and Windows.
- **Task List Improvements** – A new Details column in the Task List Grid View provides additional context at a glance.
- **UI & Platform Updates** – Visual improvements including a current day indicator, JFIF image support, and Android Google Play compliance updates.
- **75+ Defect Fixes** – Significant stability and quality improvements across the entire platform.

For detailed guidance on new features, please visit our Learning site:

<https://learning.casemanager.biz/web/WhatsNew/WhatsNew7-0.htm>

New Features

Digital Signatures

Digital Signatures is the headline feature of Version 7.0, enabling consultants to send, track, and manage digital signature envelopes directly within Case Manager. The feature is available on both the Web and Windows clients.

Key	Feature	Description
CM-4614	Digital Signatures UI	Users can add Digital Signature Merge fields to document templates for signing
CM-8223	Digital Signature service	Users can send a signing request to 1 or more recipients
CM-8225	Digital Signature return envelope	Signed PDF's are automatically saved into Case Manager
CM-8846	Signed PDF Naming	Signed PDF documents now use the original DOCX filename for consistency.
CM-8853	Merge Field Conversion	Digital Envelope merge fields are automatically converted when adding a document to a Case.
CM-8854	Save as Draft (Web)	Consultants can save a Digital Envelope as a Draft on the web client before sending.
CM-8860	Sender Email Display	The sender email address is now displayed in the envelope editor for clarity.
CM-8912	Document Protection	PDF documents linked to an envelope cannot be deleted while the signature process is active.
CM-9268	Graceful Error Handling (Web)	Network and API failures during the digital signature send process are handled gracefully on the web client.
CM-9284	Auto-Cancel on Insufficient Funds	Digital signature requests are automatically cancelled after 12 days of insufficient funds.
CM-9318	Status Alignment	Recipient status is aligned with envelope status for accurate tracking of digital signature progress.
CM-9494	Delete Draft Envelopes (Web)	Users can delete DRAFT digital signature envelopes on the web client.
CM-9583	Save as Draft (Windows)	Consultants can save a Digital Envelope as a Draft on the Windows desktop client.
CM-9590	Delete Draft Envelopes (Windows)	Users can delete DRAFT digital signature envelopes on the Windows desktop client.
CM-9610	Graceful Error Handling (Windows)	Network and API failures during the digital signature send process are handled gracefully on the Windows client.
CM-9625	Status Column (Windows)	A new Digital Signature Status column is available in the Document Tab on Windows.
CM-9631	Lock Properties (Windows)	Document properties are locked when a digital signature is in progress or complete on Windows.
CM-9637	Void Envelope (Web)	Users can void a digital signature envelope on the web client.
CM-9643	Void Envelope (Windows)	Users can void a digital signature envelope on the Windows desktop client.

Key	Feature	Description
CM-9649	Preview Footer Buttons (Windows)	Digital Envelope footer buttons are available in Preview mode on Windows.
CM-9655	Editor Footer Buttons (Windows)	Digital Envelope footer buttons are available in Editor mode on Windows.
CM-9661	Send Signature (Windows)	Consultants can send a Digital Signature from the Case Manager Windows client.
CM-9749	Protect Signed PDF (Web)	Signed Digital Signature PDF documents are protected from deletion on the web client.
CM-9750	Protect Signed PDF (Windows)	Signed Digital Signature PDF documents are protected from deletion on the Windows client.
CM-9767	Disable PDF Download Button	The download button in the PDF Viewer (PDF.js) is disabled for digital signature documents.
CM-9834	Protect Completed Envelopes (Win)	Completed digital envelopes are protected from deletion on the Windows client.
CM-9840	Protect Completed Envelopes (Web)	Completed or sent digital envelopes are protected from deletion on the web client.
CM-9928	Feature Visibility	The Digital Signatures icon is hidden on Windows when the feature is disabled in registration.
CM-10378	Simplified Settings	The Digital Signature Provider option has been removed from Integrations Settings to simplify configuration.
CM-11163	Visual Refinement	Digital Signature anchors are now set to white for a cleaner document appearance.

Document Custom Fields

Custom Fields can now be configured and displayed when creating document templates and working with existing file types.

Key	Feature	Description
CM-9589	Custom Fields in Templates (Web)	Document Custom Fields are displayed in the New Template window when creating new documents on the web client.
CM-9853	Custom Fields in Templates (Win)	Document Custom Fields are displayed in the New Template window when creating new documents on the Windows client.
CM-9859	Custom Fields for Existing Files (Win)	Custom Fields behaviour has been implemented for existing file types on the Windows client.
CM-9860	Custom Fields for Existing Files (Web)	Custom Fields behaviour has been implemented for existing file types on the web client.

Other Enhancements

Key	Feature	Description
CM-9288	Task List Details Column	A new Details column has been added to the Task List Grid View on the web client.
CM-10376	JFIF Image Support	JFIF image file type is now supported in Case Manager.
CM-11646	Android Google Play Compliance	The MAUI Android app has been updated to address Google Play policy requirements for READ_MEDIA_IMAGES and READ_MEDIA_VIDEO permissions.

Resolved Defects

The following 76 defects have been resolved in this release.

Key	Description
CM-5153	Report: Overdue Accounts by Company now correctly handles negative numbers.
CM-5323	Web: Sorting and scrolling issues in Tools > Search have been resolved.
CM-5438	Error no longer occurs when clicking Multiselect in Document Templates.
CM-5657	Users can now forward Word documents from the Documents tab.
CM-5658	Document grid now refreshes correctly after a delete action in pop-out mode.
CM-5659	Duplicating a Word document as PDF no longer shows a UI error in the popup.
CM-5848	Error messages no longer display raw JSON when a user lacks Case access.
CM-6349	HTTP 500 error when navigating to the Cybersecurity Information sheet has been resolved.
CM-7932	Documentation grid icons are now correctly aligned after the Kendo UI upgrade.
CM-7934	Spinner now functions correctly after the Kendo UI upgrade.
CM-7949	Case List Criteria popup now displays only relevant views.
CM-7950	Expand Panels functionality has been restored.
CM-7951	Column selector dropdown now renders correctly.
CM-7952	Editor height now properly flex-fills the available space.
CM-7959	Costs Tab background colour has been corrected after the Kendo UI upgrade.
CM-7991	Tab colour consistency between versions has been resolved on the Employee list page.
CM-8079	Company Settings: IsOfficeSpecific field now displays with correct spacing.
CM-8180	Error when navigating to Lists > Document Template has been resolved.
CM-8189	Action button in Document Template Details is now correctly positioned.
CM-8395	Add Costs UI issue has been fixed.
CM-8762	Improved error message for missing Invoice Template under Categories > Printing.
CM-8852	Document name is now displayed in the Document to sign field when creating a new envelope.
CM-8875	Reassigning a case to another user no longer displays a modal error.
CM-9061	Correct envelope status is now sent when there is no credit.
CM-9100	Drag and drop file upload errors have been resolved.
CM-9204	Linked files now load correctly on Case Manager Desktop.
CM-9219	504 error when sending an email from the Documents page has been resolved.
CM-9235	REPXValidator no longer breaks Invoice Layouts.
CM-9294	Digital signature request status now displays correctly.
CM-9317	Category Filter now functions correctly on Lists.
CM-9361	Appropriate error is now displayed when selecting a locked document for digital signatures.
CM-9391	Digital signature envelopes can now be sent for US-based configurations.

Key	Description
CM-9455	Custom Field deletion failure due to Snapshot Isolation has been resolved.
CM-9500	Email 2 field now works correctly for Digital Signature email validation.
CM-9538	Signature request creation issue has been resolved.
CM-9607	Save as Draft is now enabled for all digital signature scenarios.
CM-9623	Client names containing the word null now display correctly in the Case List grid.
CM-9692	Registration Service update issue has been resolved.
CM-9709	Windows: DS templates can no longer be sent again after they have already been sent.
CM-9760	Error when voiding a digital signature envelope has been resolved.
CM-9789	Windows: Duplicate in PDF Format now works correctly.
CM-9795	Windows: Object reference error when sending email has been resolved.
CM-9802	Windows: Hard error when navigating to View > Reports has been resolved.
CM-9830	Send button now shows a clear error message when disabled for a DS template.
CM-9850	Windows: Updating Company details no longer incorrectly triggers a Company Name change warning.
CM-9892	Duplicating a document with mandatory custom fields no longer fails with an error.
CM-9939	SMS status no longer gets stuck on Sent.
CM-9954	View in company list link now displays correctly.
CM-9955	Company name now correctly displays as a hyperlink.
CM-9968	Error when deleting content of formatted text has been resolved.
CM-10017	Digital Signature envelope creation and sending issue has been resolved.
CM-10026	Users can now edit emails in draft that are 7 days or fewer old on the Windows desktop.
CM-10078	Assigned To field no longer duplicates when creating a new DS envelope.
CM-10225	Improved error message when attempting to delete a signed DS PDF on both web and Windows.
CM-10316	Company name text field is no longer disabled when creating a new case.
CM-10375	Consistent behaviour between Web and Desktop for Other Lists > Referral Type configuration.
CM-10441	Drag and drop documents now works correctly.
CM-10557	Improved weak password error message.
CM-10786	Web: Sign out of Microsoft button has been fixed.
CM-10806	Error when sending an SMS has been resolved.
CM-10807	System administrators can now view registration details correctly.
CM-10828	Error messages are now highlighted in red when exceeding 4000 characters.
CM-10839	Users can now save a DS envelope as draft when the DS email message is empty.
CM-10840	Assigned To field is no longer required when saving a DS envelope as draft.
CM-10841	Web: Deleting an estimate cost now correctly refreshes the editor view.
CM-10858	Error when creating a new text custom field has been resolved.
CM-10900	Error after creating a new case has been resolved.



Key	Description
CM-10901	Creating a duplicate security group now shows a user-friendly error message.
CM-11037	Digital Signatures service stability issue has been resolved.
CM-11108	Android: Mobile app issues have been resolved.
CM-11115	Templates for formatted text now display correctly.
CM-11156	Digital Signature credit tracking issue has been resolved.
CM-11383	CMDS CaseContact table error has been resolved.
CM-11388	Invoice Batch Utility issue has been resolved.
CM-11488	Digital Signature credits now update correctly in Registration.
CM-11510	Error when printing an invoice to the Documentation tab after upgrading to 7.0 has been resolved.