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Case Manager V6.4.0 - Release Notes

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/WhatsNew6-4.htm

Summary of enhancements added to the 6.4.0 Release

- New Invoice Batch Utility for Windows Desktop
    a. Improved memory performance when sending large batches.
    b. Ability to re-send failed batches.
    c. Comprehensive reports on batch history.
    d. ***Important Changes***
       The ability to email invoices using the Invoice Batch Utility has been disabled on Case Manager Web. This is due to ongoing development of the *IBU* rewrite. The new Invoice Batch Utility for web is planned for a future release.

- New Multi-select Custom Field
- Enhanced Grid View for Custom reports
- New ability to download of PDF Invoices as merged document or separate PDF's
- Contact Address Chips when creating an email
- Modal views can be expanded to the full window in web client
- New Security Group Permissions
    a. Transaction Locking rules
         i. "Can alter transactions locked by locking rules."
    b. New Security Permissions to prevent unauthorised changes to Case Contacts
         i. "Allow changes to case contact company name."
         ii. "Allow changes to case contact name."
         iii. "Allow changes to case contact email."
         iv. "Allow changes to case contact phone/mobile."
         v. "Allow changes to case contact address."
    c. New Security Permissions to prevent unauthorised changes to Case Contact Roles
         i. "Can Assign or Remove Bill To Case Contact Role."
         ii. "Can Assign or Remove Client Case Contact Role."
         iii. "Can Assign or Remove Employer Case Contact Role."
         iv. "Can Assign or Remove Referrer Case Contact Role."
    d. New Security Permissions to prevent unauthorised emails or SMS to non-case contacts.
         i. "Can send email to non-case contacts."
         ii. "Can send SMS to non-case contacts."
    e. New Security Permissions to prevent unauthorised access to Archived or Erased Cases.
         i. "Can view archived cases"
         ii. "Can view erased cases"

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Case Manager release 6.4.0.6538

Released: 8 Apr 2025

We are pleased to announce the latest version of Case Manager, which includes performance enhancements and addresses the issues identified in the 6.4.0.x releases.

Changelog of Enhancements

Key	Description
CM-8191	Improved loading of Invoices and Costs
CM-8518	Improvement to the naming of column labels for contact "Reference" fields

Issues Resolved

Key	Description
CM-8215	Assignee is re-assigned to current user when modifying a Task
CM-8394	Company Name field is not a hyperlink on Case Contacts tab
CM-8504	Invoice Batch Generator - zip archive does not contain separate invoices
CM-8571	Incorrect email is added from non-system case contact roles
CM-8603	Deleting and recreating a custom field throws error in document templates
CM-8647	User not authorised to view InvoiceBatchList error on login
CM-8734	Unable to update Case Flags
CM-8735	Delay when loading System Options in windows client
CM-8867	Issue resolved when using basic auth on web client

Case Manager release 6.4.0.6050, 6.4.0.6463

Released: 5 Feb 2025

We are pleased to announce the latest version of Case Manager, which incorporates new features, enhanced security measures, and performance optimisations.

Changelog of Enhancements

Key	Description
CM-5594	Mobile App displays Case Client Date of Birth
CM-7838	Add new index to Costs table to improve loading of Invoices
CM-7307	Update UI to Configure Export Property for CMDS
CM-7196	Claiming.com.au : Update CM so that Providers are created with correct properties
CM-6829	Implement Throttling for Email Sending in Invoice Batch Utility
CM-6255	Include the Cybersecurity Information Sheet in web client (SaaS only)
CM-5260	Integration needs ability to modify Case Info using REST API
CM-4349	Documentation Tab columns not retaining position
CM-749	Multi-Select Custom Field type
CM-780	[Reports] Show results in "Grid" view option
CM-782	Improved workflow for previewing a PDF of any document in the Accounts tab
CM-2173	Consultant is returned to last URL after signing back in
CM-2216	Business manager needs ability to import payments
CM-2244	Ability to download invoices as separate files
CM-2245	Admin can add custom fields to different entities in Case Manager
CM-2420	Admin can add merge fields to SMS template and Plain Text templates
CM-2560	All Grid column widths should be adjustable
CM-2588	Web version supports launching calling apps (e.g. Teams) from case contacts screen
CM-2626	Web version saves grid column order changes
CM-2731	Admin can Duplicate a Custom Field
CM-2824	Email Address Lockdown
CM-2844	Consultant can preview and save a PDF of any Transaction type
CM-2854	Email addresses are rendered as a 'chip'
CM-2860	Consultant can Right click on menu items
CM-2997	Consultant can use tables in formatted text documents

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CM-2996	Can edit Company Entity details for a Case Contact is read-only
CM-3017	Consultant can expand modals to full window
CM-3024	Admin can configure task completion name
CM-3178	Improve visibility of Sort Arrow on narrow columns
CM-3179	Improve Web Grids - add "Group by Box" option
CM-3181	Admin needs ability to rename an Estimate Template
CM-3189	Improvements to Reminders Window
CM-3190	Consultant can rename Document Title after successful upload
CM-3248	Add auditing to Activities
CM-3247	Add Auditing for Document Templates
CM-3218	Add Auditing to Other Lists
CM-3217	Add auditing for Employee List
CM-3265	Add Auditing to Categories
CM-3255	Consultant can create new email from Case Contact Email
CM-3254	Admin needs ability to Print Selected Journal Entry
CM-3253	Enhance Other Staff dual-lists window
CM-3368	Admin can restrict modifying Case Contact details by security permissions
CM-3427	Implement new CHIPS UI when selecting a mobile number
CM-4131	New Security Permission for SMS Mobile numbers
CM-3441	Admin can easily differentiate between Case List Views with the same description
CM-3446	Modify Case Details Custom Field Source
CM-3632	Admin can see changes in audit history when editing a multi-select custom field
CM-3715	Show a helpful message when creating a Case and all Categories are inactive
CM-3722	Consultant does not see a "foreign key constraint" error message after deleting a cost
CM-4167	Update Auditing to include when Reports are run

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Issues Resolved in 6.4.0

Key	Description
CM-7918	Error when signing in using Basic Auth
CM-7675	VPN ErrorCode CVPNV3-1
CM-7637	Medicare Claim Report not recognising date filters
CM-7014	Log Files are not being recorded when using the Estimate Rate Adjuster Tool
CM-7013	'Name Order' UI is broken in Windows
CM-7011	Secondary Address Fields (Postal) are not editable under Case Contact tab
CM-6947	'Confirm new password required' error message contains tech jargons which is not end-user friendly
CM-6873	New IBU : Microsoft Interactive Sign-in is displayed while a batch is being processed
CM-6558	Mobile App 6.4.0 displays "Authentication failed" errors when using basic auth
CM-6554	Case Contact "Roles" dropdown re-assigns role to "client"
CM-6388	Employee multi-select dropdown is displaying incorrect view
CM-6372	Add Item to dropdownlist fails
CM-6349	HTTP 500 Error when navigating to Cybersecurity Information sheet
CM-6344	Devtest64 windows Refresh Registration Failure
CM-6294	REST API 6.4 : Timeout errors on Create Document (POST)
CM-6247	Case List Criteria defect
CM-6238	REST API 6.4 - Errors on POST Case request
CM-6227	Multiple script errors when printing an invoice in 6.4.0
CM-6226	Error when 'Consultant' tries to update a Custom Field
CM-6174	Delete Attachment and Download Attachment button's appearance are broken
CM-5636	Email attachment streams are not saved
CM-5556	Mobile App always displays Document Template Title in template list
CM-5327	MedEbridge Integration : Error importing file - object is not valid
CM-4637	Non-descriptive error message encountered when exporting specific Journal Entry List to Xero
CM-4558	WIN - Create PDF from existing document
CM-5275	Custom Fields. Modify Permission deny fails
CM-5264	Estimate error - Delete an estimate Cost fails
CM-5246	Custom Fields. Move up/down fails

CM-5229	Category Estimate settings are not displayed correctly when navigating the grid
CM-5219	Estimate costs marked as non-billable are not displaying in red
CM-5193	Report. Export List to Excel generates html code in subtotals
CM-5191	Can create more than 1 workflow step with no parent
CM-5185	Case Manager Web doesn't display error message for missing external files
CM-5183	Document Templates - Audit History does not record the "Updated" status for an external file
CM-5179	Document templates window is broken in Windows app
CM-5164	New Invoice with new cost is not saved
CM-5154	Report - Overdue Accounts by Company. Exclude closed cases is not saved
CM-5143	Costs Grid. Linked To Estimate tooltip is broken
CM-5139	Email To, CC and BCC fields are not saved in Draft
CM-5137	Audit History: filter by all fails
CM-5136	XERO does not export contact information to Xero Invoice Reference Field
CM-5130	Unable to save appointments
CM-5128	Save custom field fails
CM-5122	Send Email with attachments fails
CM-5119	Icons for Associated Cost and Attached Files are missing in Documentation grid
CM-5118	MedEbridge pending referrals connection fails
CM-5116	Transaction manager error
CM-4755	Blank Emails issue
CM-4591	New Case creation fails due to a custom field
CM-4581	Custom fields doesn't show up correctly in Activities
CM-4545	Newly created case contact is not displayed in To field when creating a new email
CM-4544	Validation Error encountered when adding one or more documents from local machine
CM-4543	Icons for Associated Cost and Attached Files are missing in Documentation grid
CM-4542	Case Document attached to a draft email disappears after adding a Local File
CM-4360	Double clicking on the attachments tab when there is none the app crashes
CM-4357	Document icons are missing from the grid in Documentation tab
CM-4318	Sales Summary Report error
CM-4267	Case Manager freezes when loading preview for certain DOCX Files
CM-4152	Invoice batch utility error - "Wait operation timed out"

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CM-4122	User can still acquire a document lock when document is not editable
CM-4119	Multi-select custom field can be created with duplicate reference
CM-4069	Custom Fields. 'Display on Case Details' should be available only for 'Case Custom Fields'
CM-4068	Costs Tab. Inconsistency in Duration field between editor and grid
CM-3997	Error when double clicking on AddCost Grid
CM-3992	Creating a new invoice fails
CM-3936	Document is not locked if the file fails to download by Document Manager
CM-3917	VPN cannot be established on fresh install of Windows version
CM-3876	Case Cost is not selected when the Timesheet locate button is clicked
CM-3824	Unable to view workflow or create new workflow step
CM-3771	Workflow designer Web - Creates Multiple instances when an error occurs
CM-3739	Multiple tabs are opened when locking an external file
CM-3721	New Company column settings are not applied after save
CM-3634	Error encountered when creating a new recurring appointment
CM-3509	Error thrown when printing email
CM-3488	Changes in Case Details page not saved
CM-3487	Duplicating a List custom field does not copy its Reference List
CM-3405	Property setter error when creating a new Document Termplate
CM-3384	New invoice performance issue
CM-3378	"Invalid attempt to read when no data is present." error message is encountered when sending email
CM-3356	Cursor position moves when using Kendo Rich Text Editor in a modal
CM-3354	Case Manager Windows : Error when editing any fields under Employee list
CM-3328	Case Manager windows locks up after selecting Reply
CM-3268	Additional options in Reports are cleared when exporting
CM-3257	The merge fields <<AssignedToService>> does not work
CM-3236	Sys Admin > Cannot Create new Employee or alter permissions on an existing Employee
CM-3187	Case Manager error for email references the wrong field
CM-3107	Sorting by Category does not work with Document Templates Grid
CM-2881	Custom Field error on winforms when closing the custom fields window
CM-2875	Navigation is broken in some grids
CM-2843	User is unable to print Adjustment, Payment or Refund

CM-2552	Billable Hours Case List Column shows a '$' symbol.
CM-1310	Workflow Step not Deleting

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Case Manager V6.3 - Release Notes

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

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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

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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

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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