Release Notes

Linetime Version: 5.1

Release Date: 15/09/2025

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Table of Changes

Features and enhancements

Liberate Administration Utility

Integration - Perfect Portal

LTRM-348 Perfect Portal Integration

Liberate now extracts the “case type guid” when importing cases from Perfect Portal.

The guid can then be used as the key to link the mappings when importing cases into Liberate.

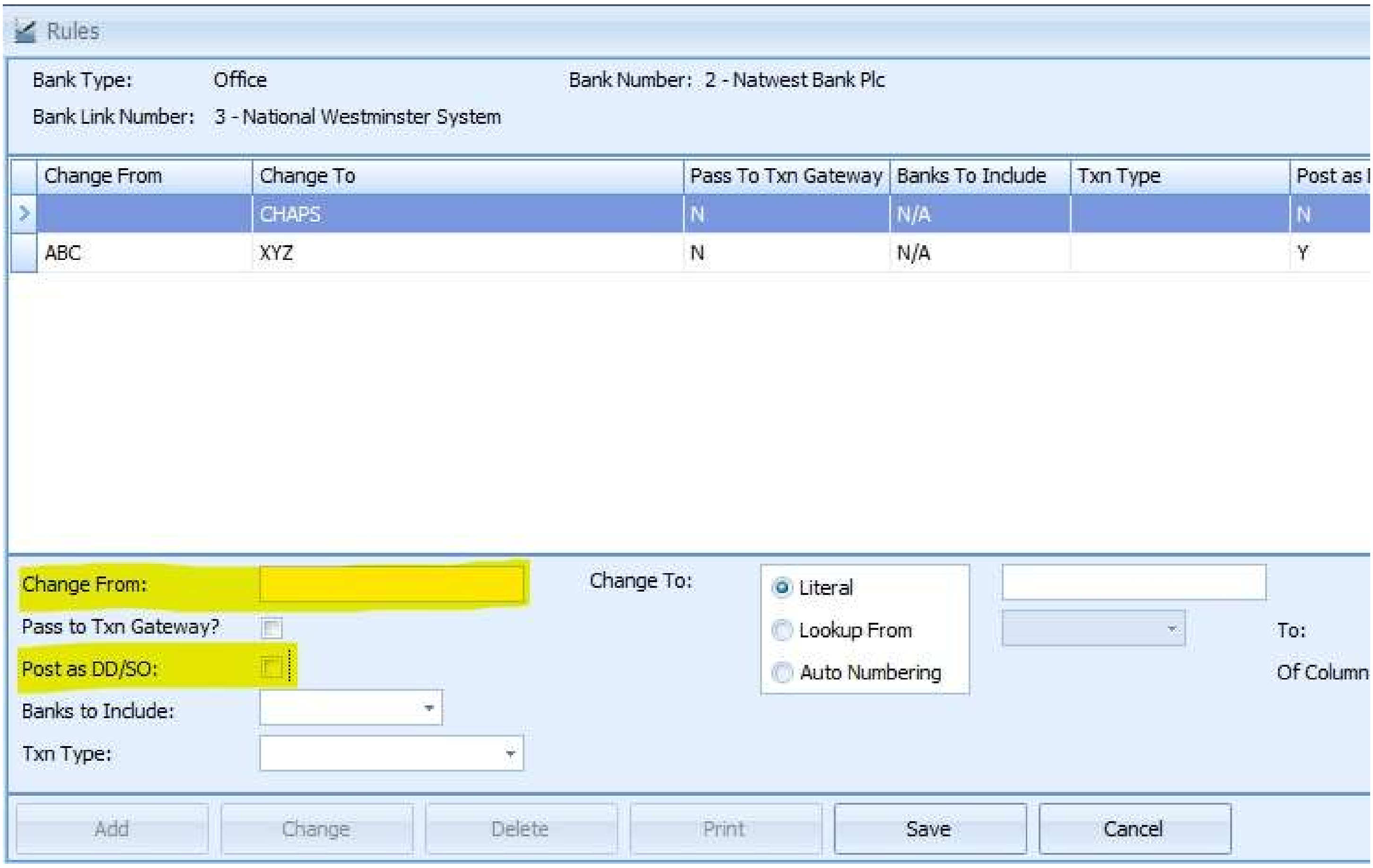
Liberate SE

Bank Reconciliation

LTRM-405 Added support for auto creation of Direct Debit/Standing Order records when importing bank statements.

Details of Standing Orders/Direct Debits can be set up using existing functionality in Nominal Postings.

On ZO 68688379 when a bank statement is imported in BankRec, then the system will look at the import rules that are set up against the bank link record for the selected bank for a row that has a LRBREF that matches the incoming transaction type and also has the LRPADDSO flag set. In the front end these are the “Change From” field and the “Post As DD/SO” checkbox.



If a match is made on an incoming statement transaction then the system looks at the Standing Order/Direct Debit details in Nominal Postings looking for a record for the selected bank that has the “Post from Bank Statement” checkbox ticked, and the Reference matches the transaction description on the incoming statement transaction: If a match is made then the values are read from the Direct Debit screen and used to create a corresponding Direct Debit record (in the ACDD table).

Once the records are in ACDD they can be picked up and processed using existing functionality.

Note : this functionality is only available for Office Banks.

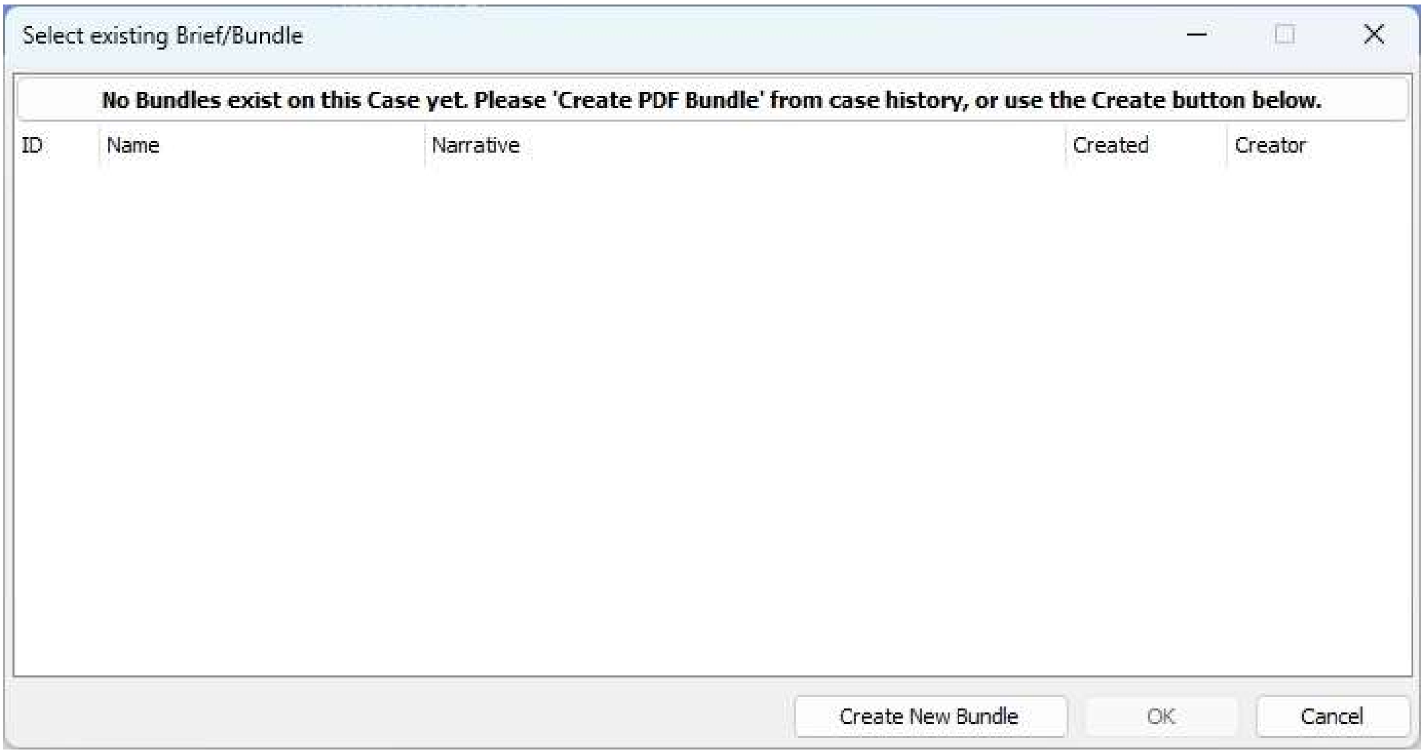
Client/Party Maintenance

LTRM-419 Case/Matter list dropdown in client maintenance changes the wording of "Load Case" to "Load Debt" if case is marked as a debts case.

Document Bundling

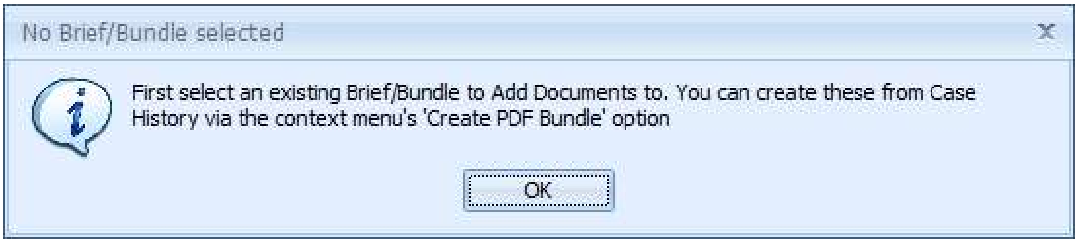
LTRM-367 Improved messages in Document Bundles

If you select Add to Bundle but there are no Bundles, the Bundle selection form will now explicitly state this and disable the OK button – as shown below:



Also, a "Create PDF Bundle" button becomes available at the bottom - this will create a new Bundle and add the selected history documents to it.

In Bundles , if you select "Add Document" but there's no Bundle selected, instead of doing nothing it will display this message:

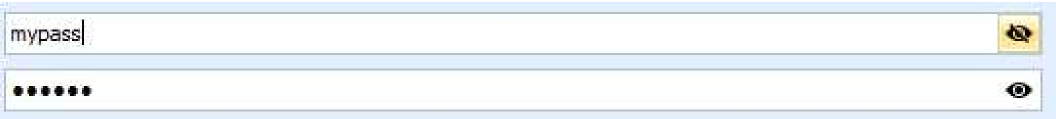


Document Production

LTRM-430 New password confirm check when applying passwords to email attachments

The password dialog shown when adding a password to an individual attachment has been changed to the form shown below:

This adds a “Confirm Password” box, as well as buttons which toggle the visibility of the entered password:



In addition, when using a single zip file for all the attachments, the password input box has been replaced with a “Set Password” button. This button uses the same password input dialog as shown above.

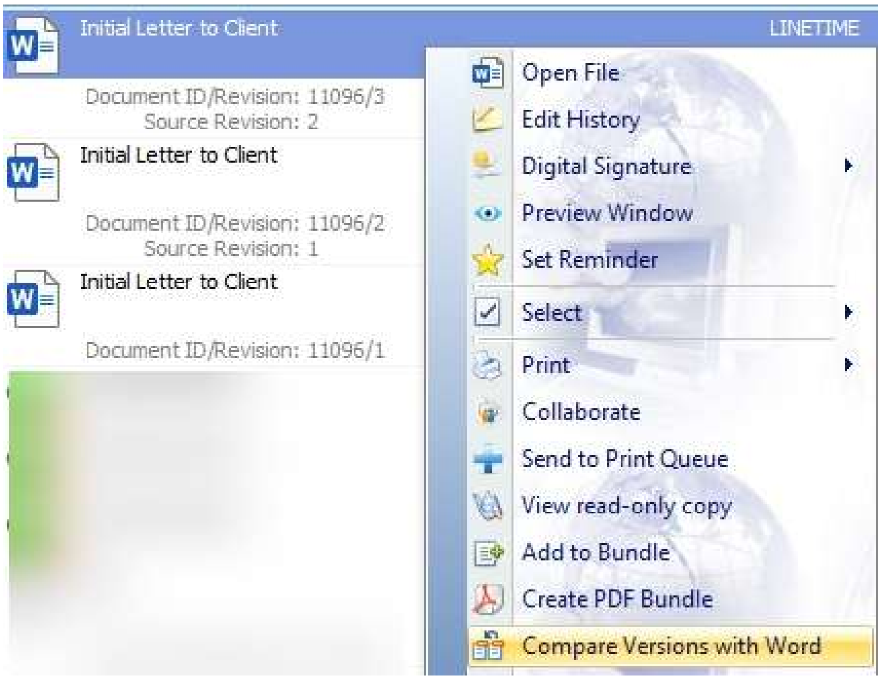
LTRM-316 Additional checks added to document check-out/edit process to prevent zero-byte file creation

Environmental factors, such as user profiles that sync across different machines, or profiles that sync with cloud storage services, can result in check-out files not always being immediately present when expected. In certain race-conditions, it may have been possible for Liberate to create a zero-byte version of a file it was trying to access. This change removes that possibility.

There are also additional informational message to users informing them if a file is not found in the recorded check-out location.

LTRM-207 Implemented Microsoft Word Document Comparison

Users can now select “Compare Versions with Word” from the case history context menu



Only the following types of documents are eligible for a Word comparison: .docx ; .doc ; .xml (Word XML Formats) ; .rtf ; .txt ; .pdf*

This option is available when

1. Right clicking on a document that has at least one previous version. In this situation, the documents being compared will be the one being clicked on, and it’s previous version.
2. Right clicking on a document when any two Word documents are selected in the Case History view. In this situation, the documents being compared will be the two selected documents

When the new option is clicked, the system will obtain a local copy of the two documents to compare. The Document Comparison feature in Microsoft Word will then be launched; this opens up A new comparison Document in Word, where differences between the two documents are highlighted. As shown below, Word also displays the two documents in their own panels, as well as a side bar containing each revision.

*Note that Word first converts PDFs to Word documents when using this feature to compare PDFs - this conversion takes place on a local temporary copy of the document and doesn’t impact the document in the CMS.

Email Management

LTRM-130 Now checks if email was attached to a quote when replying.

If replying to an email that was attached to a Case when it was a Quote, the Add-in now locates the corresponding live Case and prompts to attach.

Integration - FormEvo

LTRM-208 Conditional Logic is now handled when merging into Cloud Forms and Form Evo type documents

Conditional Word statements can now be used when designing Form Evo/Cloud Form precedents within Liberate Administration. These follow the same form allowed in regular precedents, for example:

*IF|<284>|=|L|Leasehold|ELSEIF|<284>|=|F|Feeehold|ELSEIF|<284>|=|C|Commonhold|ELSE|VIX|

Integration - iManage

LTRM-422 Work10: Improved handling of Document Edits when the Document Operator has been disabled within iManage.

Work10 integration logic now sets the ‘Warnings’ flag for Document edit submissions to the /file resource.

"warnings_for_required_and_disabled_fields":true

This prevents an error response from the iManage API for the Document submission detailing that the Operator has been disabled.

This change aligns the Document Edit mechanic with that used when submitting an edit which will create a New Version of the Document.

Integration - LawY

LTRM-226 Introducing LawY Legal Assistant

Unlock AI-powered legal insights directly within Liberate! The new **LawY integration** lets users:

- Ask legal questions and refine AI-generated responses
- Submit answers for lawyer verification
- Configure Case Types with targeted LawY Matter Types
- Control user-level access to LawY with flexible settings
- Seamlessly launch LawY from the Liberate Case session

With **LawY Evaluations**, you can now access transparent, lawyer-verified benchmarking to see how LawY compares with other AI platforms. Available to all V5.1 users.

Empower your legal work with AI, while keeping control and compliance at the core.

QuickSearch

LTRM-335 New user-level option allows keeping QuickSearch open

A new option is available in Liberate->Options-User->Searches; "Keep QuickSearch window open after each use".

If enabled, when you load something from a QuickSearch result, the QuickSearch window will remain open. You can still explicitly close the windows with the close button or by using the cross in the window caption bar.

Time Recording

LTRM-331 New system option allows Time Review area to be visible even when time recording is being supressed by other settings.

New ZO option 71021971: Shows Time Review even when time recording is suppressed.

Liberate SE Accounts

Billing

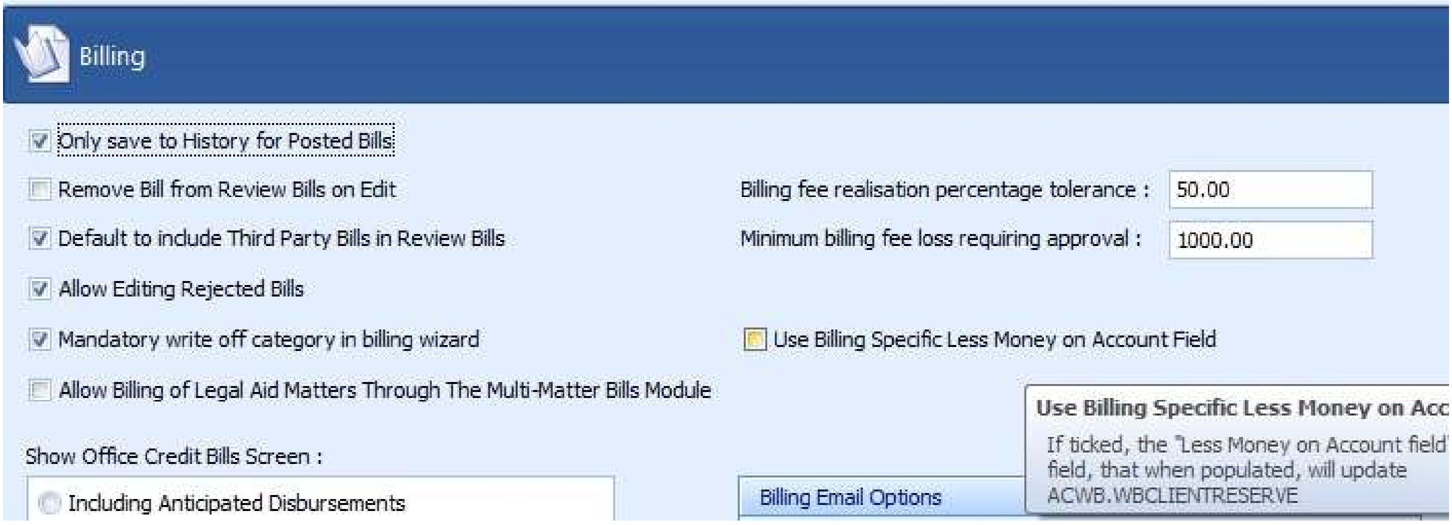
LTRM-107 New system option to control how "Less Money on Account" is populated in Billing Wizard

Currently, the "Less Money on Account" field in Billing Wizard is automatically populated with the "Client Reserve" field on the accounts matter header. This occurs every time you the billing wizard screen is initialised for a new bill (e.g. after clearing the screen, or posting the previous bill)

If the "Less Money on Account" field in Billing Wizard is editing by the user, the system writes this value back away to the accounts matter header.

We are adding a new system option to change this behaviour so that, instead of defaulting to the Client Reserve on the accounts matter header, it will default to the Client Reserve amount on the draft bill record. This will be zero for a new draft bill or, if you are editing an existing draft bill it will use the value entered when that bill was drafted.

The system option will be in Admin Options->Billing, called "Use Billing Specific Less Money on Account Field" - which means, store the Less Money on Account field against each draft bill.



LTRM-105 Added new feature in Billing Wizard allowing disbursements to be split.

A user-level security option has been added to control access to the new Split Disbursements functionality in Billing Wizard.

Module # 1523 : Billing Wizard - Split Disbursements

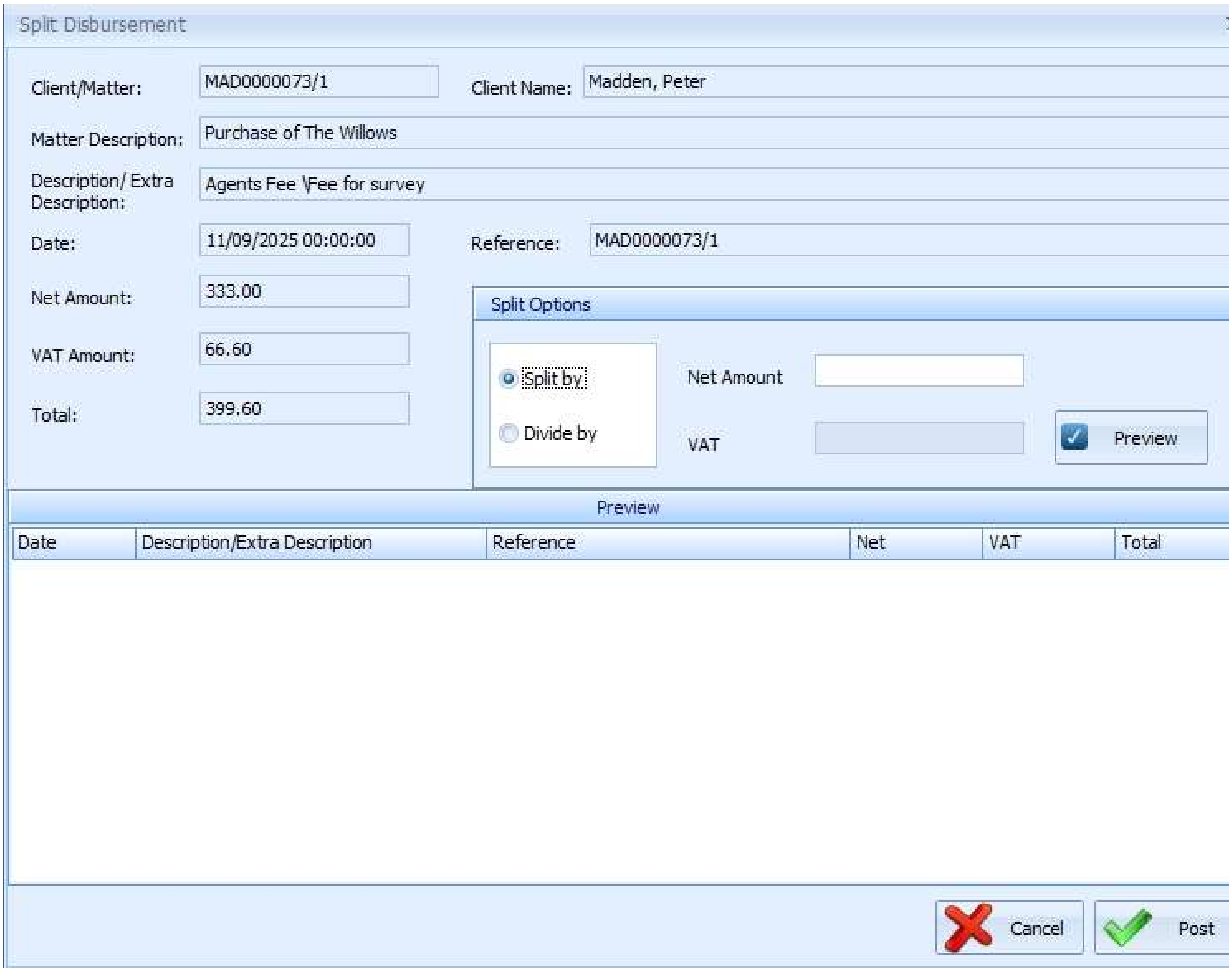
Module No	Description	Allowed?
1520	Billing Wizard - Edit Time Value	☑
1521	Advanced Billing Collaboration	☑
1522	Billing Wizard - Edit Transaction Description	☑
1523	Billing Wizard - Split Disbursements	☑
1601	Vat Return Enquiry	☑

Users with access to this feature will see a new button in the “Select Disbursements” screen within Billing Wizard.

Select Disbursements

Date	Type	Description	Extra Desc.	Net Amount	Vat Rate	Vat Amount	Bill
11/09/2025	Disbursement	Agents Fee	Fee for survey	333.00	1	66.60	☐

If pressed, this button will open a further window where the splitting of the disbursement can be performed.



This window present options for splitting the disbursement by either a set amount (Split By), or dividing into a number of new disbursements (Divide by).

Split by

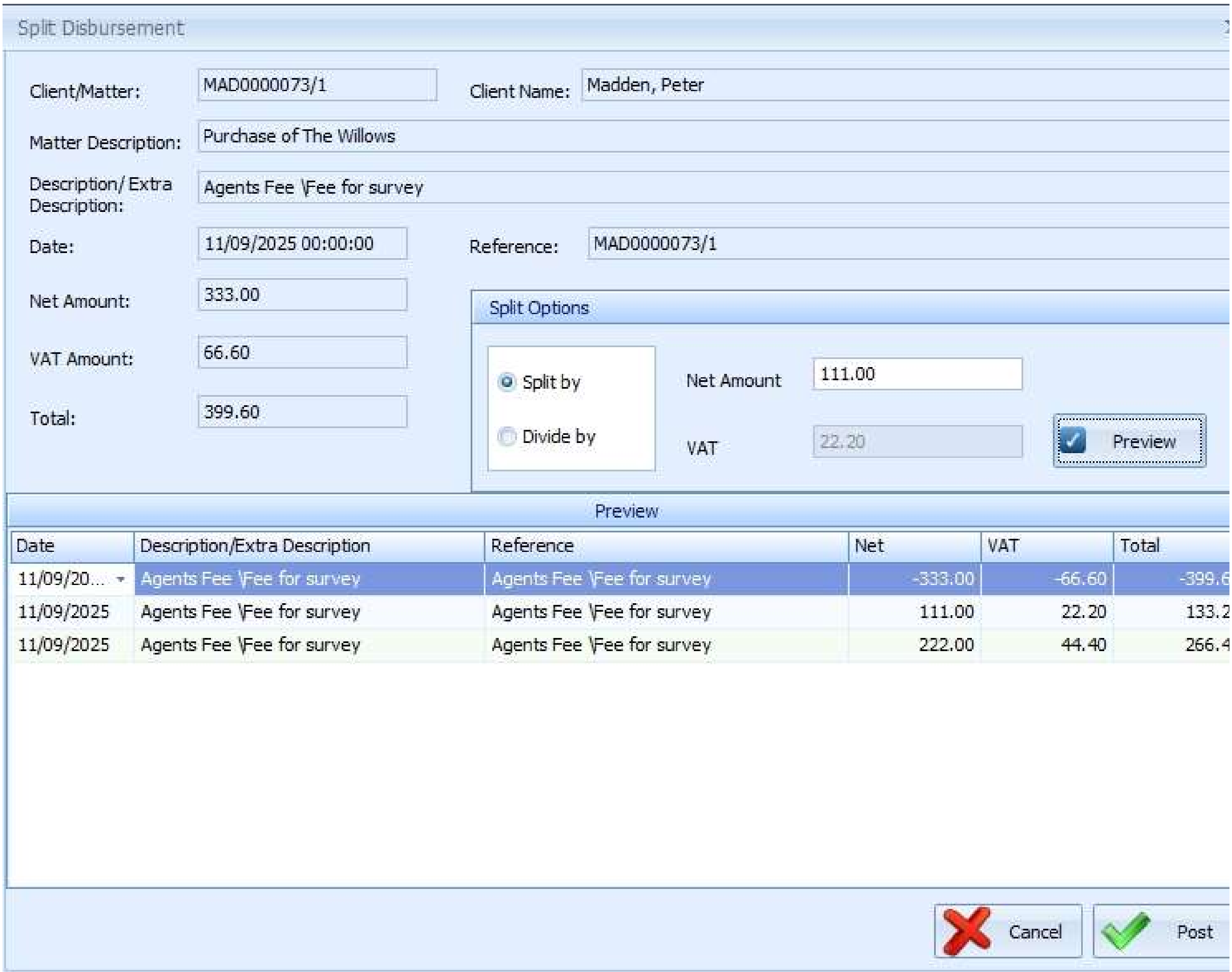
This method allows the user to enter a specific Net Amount to split the disbursement at.

The Preview button will then allow the user to see what transactions will be created as a result of the chosen split amount.

In the below example, the user has opted to split the original disbursement of £333.00 (and £66.60 VAT) at £111.00.

The preview shows this will create three new transactions;

- A contra for the original, of £-333.00 and £-66.60 VAT
- A new disbursement of £111.00 and £22.20 VAT as per the user’s specified split amount. Note that the VAT is amount is automatically split by the same ratio as the NET; it doesn't need to be specified by the user.
- A second new disbursement for the remainder of £222.00 with £44.40 VAT.



Divide by

This method allows the user to divide the original disbursement into a specified number of new, evenly apportioned disbursements.

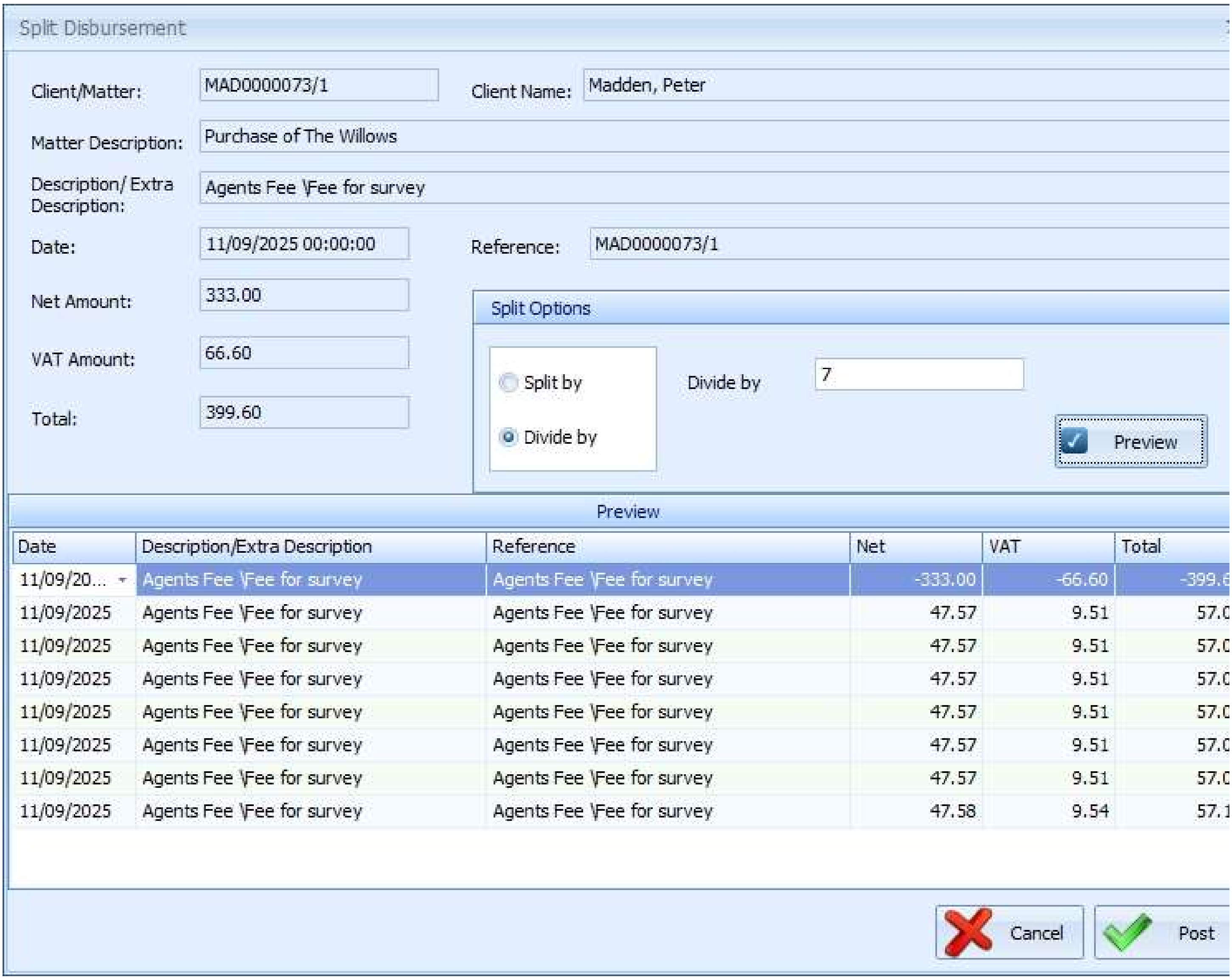
The Preview button will then allow the user to see what transactions will be created as a result of the chosen division number.

Any rounding differences that arise during the calculation are automatically adjusted on the final disbursement, ensuring the total value always matches the original.

In the example below, the user has opted to split the original disbursement of £333.00 (and £66.60 VAT) into seven.

The preview shows this will create eight new transactions;

- A contra for the original, of £-333.00 and £-66.60 VAT
- six equal disbursements for £47.57 with £9.51 VAT
- one disbursements for £47.58 with £9.54 VAT - because it contains the rounding adjustment of £0.01 NET and £0.03 VAT.



Confirming the Split

After the **Preview** transactions have been generated, the user can opt to **Post** the transactions as detailed in the Preview, change the **Split Options**, or **Cancel** out of the window with no changes being made.

LTRM-39 The fetching of data for Review Bills has been optimised for large data sets

This is an optimisation to the Transact_SQL that is submitted to the SQL Server, which requests the list of bills with which to populate the Review Bills grid. This area will continue to load quickly for small listings, but a significant speed improvement will be noticed on larger sets of data.

Client/Party Maintenance

LTRM-153 Increased size of Credit Control Note window in Client maintenance

Credit Control

LTRM-118 Enhancements to Credit Control

We’ve made several improvements to the Credit Control area of the system to make managing bills and related information easier.

Bill Book Enhancements

New optional columns have been added for display within the Bill Book:

- **Procedure** – shows the procedure (alpha code) linked to the bill.
- **Procedure Line** – displays the current line number of the procedure the bill is on.
- **Days O/S** – automatically calculates and displays the number of days a bill has been outstanding (today’s date minus bill date).
- **Matter Notes** – shows the first line of matter-level notes, with hover to view the first two lines.
- **Client Notes** – shows the first line of client-level notes, with hover to view the first two lines.

New Right-Click Options in the Bill Book

You can now right-click on a bill in the Bill Book to quickly access these new options:

- **Add/Edit Bill Note** – update bill-level notes.
- **Add/Edit Matter Note** – update matter-level notes.
- **Add/Edit Client Note** – update client-level notes.
- **Preview Bill** – instantly open a preview of the bill (available for bills raised via the Billing Wizard).

Processed Area Enhancements

New columns have been added within the “Processed” area of Credit Control:

- **Bill Note** – displays the bill note text.
- **Matter Fee Earner** – shows the name of the matter fee earner.
- **Matter Department** – shows the department linked to the matter.

All new columns include filtering options for easier searching and reporting.

Electronic Payments

LTRM-149 Electronic Payments (CHAPS / ISO 20022)

New Bank of England requirements apply to property-related CHAPS payments under the ISO 20022 standard. To ensure compliance, the Electronic Payments module in Liberate has been enhanced as follows:

- **Legal Entity Identifier (LEI)**
  - The solicitor firm's LEI can now be recorded.
  - The payor's LEI can also be stored via a new field in bank maintenance.
- **Payment Purpose Codes**
  - A new four-digit purpose code field has been introduced to categorise the reason for a CHAPS payment.
  - The system validates codes according to payment type, ensuring only permitted purpose codes are submitted.

These changes mean that when processing property-related CHAPS payments, Liberate now automatically includes all required identifiers and purpose codes, ensuring payments meet the Bank of England's ISO 20022 compliance rules.

Time Recording

LTRM-104 When time is transferred the matter budget phase now transfers across

Liberate SE Reporting

Reporting - Query Builder

LTRM-411 Added Referral view into Query Builder

Added view “vwPartyReferrals”, and supporting metadata, which can be used in Query Builder to report on referrals and associated parties.

LTRM-371 Added new reporting view for purchase ledger transactions. These can be found under the Entity Name vwPurchaseTransactions in Query Builder.

The new view can be accessed within Liberate SE → Query Builder

View name: vwPurchaseTransactions

View description: Purchase Transactions

Smart Connect

Document Production

LTRM-301 Document Pack Downloads

The document pack creation logic has been moved from Smart Connect into the Linetime service to avoid out of memory issues in ASP.NET

Total number of Features and enhancements : 23

Resolved issues

Business Intelligence Dashboard

Reporting - Dashboards

LTRM-407 Optimised the Time Analysis report stored procedure (spTimeAnalysisReport) to be more performant

This change adds efficiency to the Time Analysis stored procedure and helps mitigate timeouts which can cause the report to fail.

Liberate Administration Utility

Integration - FormEvo

LTRM-398 Increased allowable input size for the merge code field when designing Form Evo and Cloud Forms

The previous limit was 50 characters. This has been extended to 8000 characters.

Liberate Admin

LTRM-372 Fixed incorrect data save in Web->Administration->Website Maintenance

Web site maintenance now re-loads the CORs exceptions the correct way round.

WorkFlow

LTRM-347 Can now select "Profit Costs Tolerance" from the matter when creating an Action Type 20

Added “ACMA.ProfitCostsTolerance” to Admin workflow drop-downs.

Liberate Case Management

Archive Manager

LTRM-318 Fixed error that could occur when archiving cases on a client with a large number of matters.

If number of matters for one client exceeded 32,768, an error could occur when archiving cases for that client.

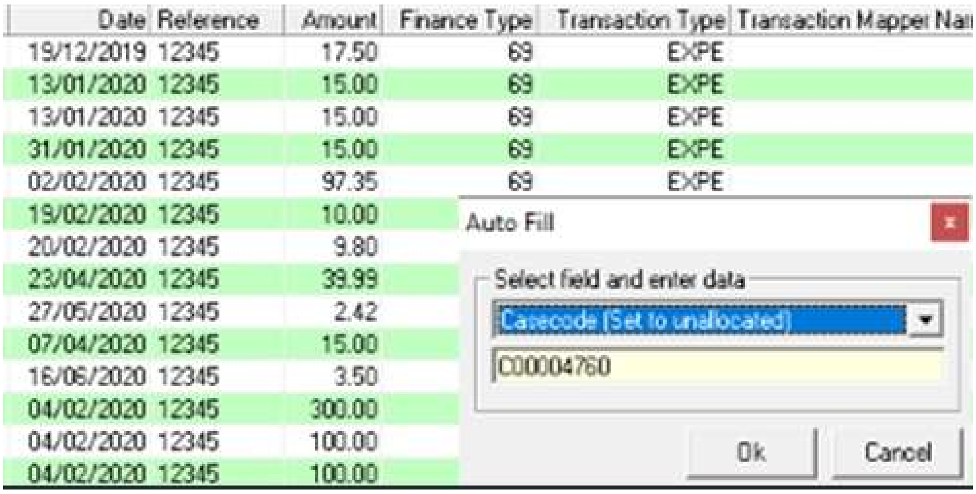
Reporting (Classic)

LTRM-399 Increased length of Time Narrative in Repgen field definition to 500 characters

Takeon - Transactions

LTRM-167 Extended "Case Code set to unallocated" to 10 chars

In transaction gateway you can select to autofill the "Casecode (Set to unallocated)". This generates a new case code based off the "Trans. Gateway" case code mask in Company maintenance. When the mask was 10 characters long, the generated case code should also be 10 characters, but transaction gateway was clipping this to 9 characters. This has now been rectified.



Liberate Debt Collection

LTRM-315 Fix to prevent CPC error when service name contains an apostrophe

Fix to prevent error when saving CPC overflow details if any of the details contain an apostrophe.

LTRM-310 Action type 84 in Debts harmonisation

Fix to allocation form repeatedly popping up when called from action type 84 in Debts Harmonisation mode.

Liberate Outlook 2010 Addin

General/System

LTRM-373 Improved compatibility of Autoupdate process for the Outlook Add-in with recent Windows updates

Recent versions of Office (especially Office 365/Outlook 2016 and later) and Windows 10/11 have increased security around how COM Add-ins and child processes are launched.
• When a COM Add-in uses Process.Start to launch an executable, the working directory is not always inherited from the host application (e.g., Outlook) as it was in the past.
• If the working directory is not explicitly set, Windows defaults to C:\Windows\System32 for security reasons.

These changes can adversely impact the behaviour of the Autoupdate process for the Outlook Add-in.

Liberate Practice Management

Interest Calculator

LTRM-349 Opening Balance now calculated correctly when users change the date range

LTRM-304 Classic Global Interest Calculator fixed to correctly take From Date into account

This fix ensures that the Interest Already Paid is shown correctly with regards to the From Date, even when the

From Date is not changed by the user, or is disabled.

Nominal Postings

LTRM-312 Fixed invalid SQL when posting petty cash transactions.

This change removes an invalid SQL error that could occur when posting a petty cash nominal payment via classic nominal postings (nompost.exe). I could error when attempting to read from the nominal bank records (ACNB) due to invalid SQL.

Reporting - Reports

LTRM-413 Fixed classic standard report 37 to ensure all live matters are included.

LTRM-361 Optimised standard report 303

Report 303 - Fee Income Summary by Matter Department, has been optimised for performance on large data sets.

LTRM-336 Increased Branch range inputs to 4 characters in Classic Standard Reporting

The system allows the creation of branches with 4 digit branch numbers, but classic standard reports had a hardcoded limit of 3 digits when running a report. This meant that it was not possible to run a report for specific branches above 999. However, they do appear on the report if you select “All branches”. This has now been rectified.

Reporting (Classic)

LTRM-244 Corrected the variance column on standard report 338

The “variance” column on standard report 338 was performing a calculation using an inappropriately formatted time value. It is now correctly calculated using the decimal time value (TTHOUR) instead of time in the format HHMM.

LTRM-85 Report R257 now responds to the user selection of Including/Excluding Left Fee Earners

Liberate SE

Autopost

LTRM-332 Fix to enable to HOLD button for transactions at "Approved" status.

LTRM-248 The "Recharge" flag is now correctly populated when editing a transaction from Autopost

When you edit a transaction, the value of the Recharge flag is now correctly populated from the transaction record being edited.

Case Maintenance

LTRM-426 Case Maintenance - Quote Go Live

When a quote case is made live the encrypted quote case code field is reset to allow the new case code to be encrypted and assigned.

LTRM-402 Funding Type drop down now excludes inactive entries in Case Properties

Funding types have an Active field, which can be set to Y or N.

The Funding Type drop down control, which is in the Matter Info tab in Case Properties, now no longer shows Funding Types which have Active set to N.

LTRM-392 Recently Used Cases list now shown correctly at case level.

LTRM-391 Fixed issue with history category filter not extending to panel boundaries.

History category filter pane drawing altered to fill available space.

LTRM-389 Improved render logic for Table type 5 controls on a case screen

Fixed issue with table type 5 control not obeying the boundaries of it parent when residing in a group or panel control on a screen.

Fixed issue with table type 5 control not obeying defined width when on a case screen.

LTRM-279 Quotes Go-Live fixes

Fixed error that could occur when making a quote case live: “Invalid column name ‘CODE’”.

Fixed issue with parties pane not refreshing and still showing quotation client on case go-live.

Client/Party Maintenance

LTRM-353 Party Maintenance: Self-Serve password

Ensured default password on Self-Serve user creation adheres to default or defined minimum length.

Credit Control

LTRM-354 Fixed *CCB listing command to include bills even if they don't have a status record

Fixed join in SQL so that bills without a status records still come through on the *CCB listing command.

Elastic Search

LTRM-406 Improvement within Elastic Search results handling to ensure Private case data restrictions.

Searching for Documents and Emails using Elastic Search had the potential to return data linked to Private Cases that the operator does not have access to.

Intermittent issue linked to ordering of data.

General/System

LTRM-423 Fixed issue where mouse cursor glitches on AVD environments when changing back to default cursor from busy

This fix has been applied to Liberate SE and the Outlook Add-in.

LTRM-412 Improvements to application shutdown and start-up

Additional clean-up steps added to help Liberate SE shutdown appropriately.

When starting a second instance of SE with the same credentials, it will now ignore the first instance and continue to start if that first instance is in the process of shutting down (as opposed to stating you can't start a second instance).

Integration - iManage

LTRM-369 Work10 integration (specific mode of operation only) - Private Uncategorised folder

Work10 correction applied to ensure that the Admin User credentials are consistently used for requests affecting the (Private) Uncategorised folder.

LTRM-340 Work10 Archive database handling

Correction added to Work10 integration to prevent a URL request using the primary Worksite database name instead of the Archive database name.

LTRM-339 Work10 integration correction for Service accounts

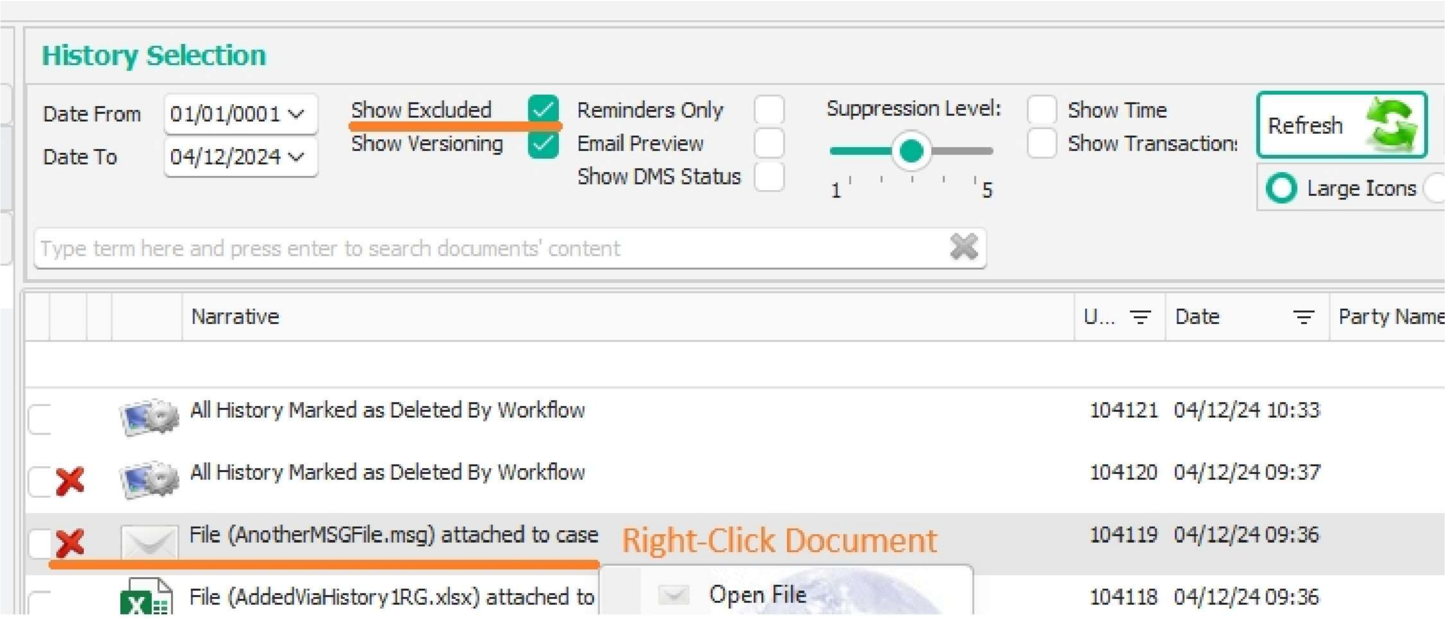
Correction applied to ensure the correct Work10 identifier is sent within Admin-level requests when used by Service (Admin) accounts.

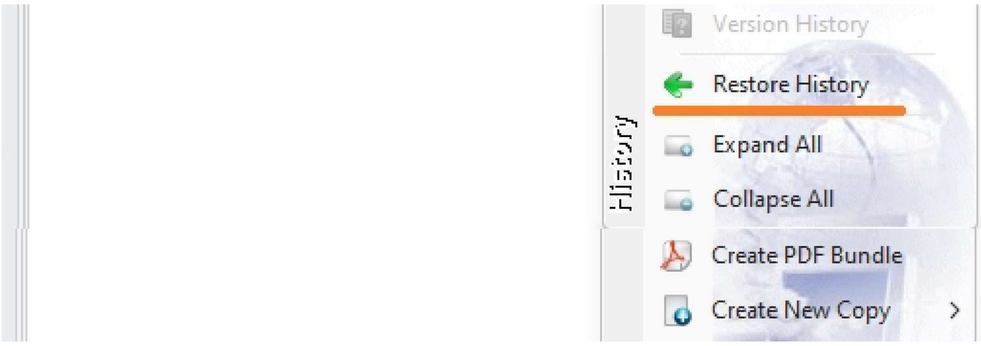
This fix removes the potential (only for long running sessions used by Service accounts) to send an incorrect Worksite Admin account identifier within a Request to Work10.

LTRM-314 Change to allow Documents to be restored in History (when using Work10 and the Document is available within the Workspace).

Because Work10 DMS mode only allows Worksite Delete Method: Delete (due to iManage Flatspace restrictions), the History Restore feature within Liberate was not available - because the DeletedHistory record was marked as none recoverable.

New behaviour is that if a Worksite Sync identifies that the Document is available within the Workspace, it will mark the DeletedHistory record as recoverable) the History Restore feature will then attempt to restore the Document.





This will also accommodate Delete scenario where the Document has been marked as Deleted in Liberate History because the DeleteHistory (Type87) WorkFlow has re-assigned the DocumentCategory into a Folder which isn't mapped to the Workspace.

Integration - Perfect Portal

LTRM-364 **Fixed issue with client creation from Perfect Portal import not creating client correctly when client is made up of more than one party.**

Licensing

LTRM-282 Licensing

Exclude Self-Serve and Client-Connect users when determining active user counts.

Marketing

LTRM-416 Assigning a party to a campaign from the party maintenance form now obeys “include in marketing” and campaign type opt outs.

Fixed issue where party could be assigned to a campaign even though party is marked as exclude from marketing.

Similar issue with campaign type opt out not being obeyed.

When assigning the party to a campaign, if the party is marked as exclude from marketing then a message is reported to the user to say party cannot be added to campaign. Similarly, a message is reported to the user if the party has opted out of a particular campaign type.

Matter Maintenance

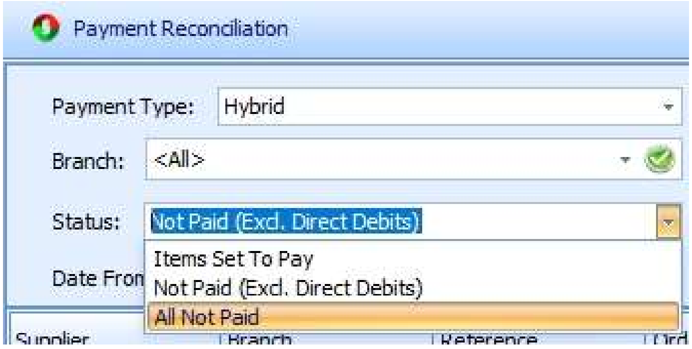
LTRM-362 Legal Aid Matter Type drop downs no longer include Matter Types marked as inactive

Legal Aid Matter Types in The Legal Aid tab in Matter Maintenance no longer show inactive Matter Types.

Purchase Ledger

LTRM-286 Changed to status wording in Payment Reconciliation

Some wording changes have been made to the status drop down filter shown in Payment Reconciliation as follows.



The previous text: Due Items/Not Set to Pay
Is now: Not Paid (Excl. Direct Debits)

The previous text: Direct Debits
Is now: All Not Paid

These changes clarify how the different selections filter Direct Debit payments.

QuickSearch

LTRM-395 Fixed error that occurs when loading a Case/Client/Matter from the Document ID search within QuickSearch

LTRM-342 Category field now correctly populated when selecting party from search results that resides in the suppliers category.

Time Recording

LTRM-417 Time Recording

The all time recording entries and selections are reset when clearing the case code client matter code field on the time recording window.

LTRM-268 Time Recording

A fix has been made regarding the Time Indicator Bar.

Split Bills are ones where the NET amount of the bill is sent to 1 party and the VAT of the bill is sent to another.

When these have been raised previously, the NET amount has calculated twice on the time indicator bar giving an inflated figure.

This has now been fixed so that the time indicator bar and associated charts are showing correctly.

WorkFlow

LTRM-428 Fix to Action Type 98 - KeyIVR submission failing due to incorrect credentials being passed as part of the submission.

Liberate SE Accounts

Client/Matter Enquiries

LTRM-278 Added column header text of "Period" to the Period column in Time Transactions grid within Ledger Enquiries.

Credit Control

LTRM-323 Fix to ensure bills at level 12 are excluded from processing when the UI filters suggest that they are.

There are a series of filters on the credit control processing screen to include & exclude various types of bill from the processing run (e.g. Anticipated, Third Party etc). There was a fault that resulted in any outstanding bills that were excluded from the run by the filters were being processed anyway, and always ones at level 12.

Electronic Payments

LTRM-249 Supporting Documents in Electronic Payments

When opening supporting documents within Review Batches in Electronic Payments it now shows only the single payment. This is also applicable when viewing supporting documents in the expandable grid for each payment.

General/System

LTRM-254 Fixed fault that could causing Liberate to crash after exiting Ledger Enquiries

A program fault could occur after the user visited the drill down for a financial transaction in Ledger Enquiries, then closed Ledger Enquiries. The conditions causing this error are now handled properly following this fix.

Smart Connect

Smart Connect

LTRM-350 Classic Liberate File Retrieval

This change allows classic filestore documents to be returned by smart connect for viewing through B2C etc, without needing the Linetime DMS ZO turned on.

Total number of Resolved issues : 50

Total number of changes : 73