



BEC CoreRelate® 4.1 Framework

Software Release Notification

We are pleased to notify you that **BEC CoreRelate 4.1 Framework** is available and ready for you to download from the BEC Legal Systems website. This upgrade includes all CoreRelate-related applications, including MatterLink, Docket Enterprise, Assemble-It, and LegalBar.

Summary of Updates

CoreRelate 4.1 provides several important and useful enhancements!

MatterLink®

- There are new ways to access court information – **My Courts**, **All Courts** and **Recent Courts** (like the existing Matter and Contact button groups.) This is very convenient from the Word ribbon, especially if you have *LegalBar Shell template pleadings* attached to MatterLink courts.
- The **Data Import Utility** now imports Entity Notes, Matter Notes, and Matter Recipients. (This is in addition to other importers introduced in 4.0.)
- On all selectors, the **Auto-Filter row** (which is the quick one at the top) has been enhanced with new types of filtering (*Equals, Does not equal, Contains, Does not contain, Is greater than, Is less than or equal to, Ends with, and more.*)

Docket Enterprise®

- New **Recent Activities** and **Recent Tasks** buttons (under *My Data*) let you go back to your most recently scheduled items.
- A new administrative custom field sets the **default hour for email reminders** to be sent.
- For the built-in **User Summary Report**, a new “Detail” layout is available, providing a printout of a specific user’s activities, tasks and/or reminders in a specified date range, and including Client Name and Billing ID, Matter Name and Billing ID, other recipient and assignment information, and inline remarks.
- The **Schedule Synchronization Service** is more efficient and robust, providing improved performance and reliability. To learn more, read our new document “*Schedule Synchronization Service 4.x Technical Guide.*”
- The Schedule Sync Service sends log messages to the **database log**, which is easy for Docket Admins to check from Docket Enterprise itself. This feature has been enhanced with better filtering, informative messages, and intuitive UI.
- The **CalendarRules.com administrative dialogs** are more intuitive.

Assemble-It®

- The CoreRelate database has been updated with **Contact Formal Name** and **Contact County** fields. These can be pulled into any LegalBar template or Assemble-It clause library for new convenience in document production.

LegalBar®

- LegalBar 4.8 has a new **Stationery** feature (a streamlined upgrade to Multi-Office Logic) and the CoreRelate 4.1 database supports this with a Stationery table and default Stationery selection in every Author Preference set.
- **File Stamp** has been completely revamped. It now uses the CoreRelate database to store file stamp formats, personal defaults, and administrative settings. Available for iManage only at this time; integration with other DM systems is coming in future releases.
- Author Preferences sets in CoreRelate now include a **'Use Direct Cell in Fax Coversheet'** setting.
- A **new Administrative Options dialog** is available from the BEC CoreRelate Suite menu. It provides administration for the LegalBar features which use CoreRelate, namely *Author Preferences, Office, Company and Stationery lists, and File Stamp*.

Also, please read "What's New in BEC CoreRelate 4.x" which describes both 4.0 and 4.1 releases and when you are ready to upgrade, spend some time with our comprehensive "Planning and Implementation Guide."

Instructions for Download

The **CoreRelate 4.1 package** and the **LegalBar 4.8** package are available for download at www.beclegal.com under the Support tab, on the CoreRelate and LegalBar pages respectively. Cumulative *release notes, Upgrade Guides, and "What's New?"* documents, can also be found there. (Valid login credentials are required. Please email support@beclegal.com if you do not have this information.)

Questions about Implementation Planning or Installation?

Contact BEC Legal Systems support at 800.948.4810 or support@beclegal.com if you have any questions, or would like a walkthrough, training or assistance with your upgrade.

Thank you from the BEC Legal Systems team!

