

# Release Notes

This page contains release notes for **MaxBilling 2.0 to 5.4** and all product updates.

For a current list of known issues in MaxBilling, see [Known Issues](#)

Date	Version	Type	Features	Description
04/19/2024	6.2.1301.30	New feature	Storage Type	A new Grace Period in Days option has been added in the Repository Storage Type Configuration object (under MaxBilling Settings). If Repository Grace Period in Days is populated with a certain number, the application will consider any Workspaces for Repository even if the Repository application was not installed for the corresponding number of days in the beginning of the reported period.
04/19/2024	6.2.1301.30	New feature	Profile	Users are able to copy an entire Profile via the Copy Profiles mass operation in the Profiles tab.
04/19/2024	6.2.1301.30	Enhancement	Case Rollup Statistics	DtSearch billing item statistics collection has been enhanced so if no index size information is returned by the API due to modified location paths, the size will be pulled out from SQL utilizing IndexSizeBytes in [EDDSDB0].[dtSearchSubIndex].
04/19/2024	6.2.1301.30	Enhancement	Reports	Workspace Status column has been added to the following report files: ExportData.xlsx, ExportData-Matters.xlsx and ExportData-Clients.xlsx
04/19/2024	6.2.1301.30	Enhancement	Email	MatterName and MatterNumber placeholders in an Invoice Type Email Template can be utilized when sending Invoices per Client.
02/14/2024	6.1.1301.10	Resolved defect	Invoices	Users are able to successfully edit/save an Invoice Item in the Invoice Templates.
02/14/2024	6.1.1301.10	Resolved defect	Settings	UI options for deleting the Settings object are not available.
02/14/2024	6.1.1301.10	Resolved defect	Pricings	Adding a pricing item in an Exclude Pricing type is not allowed.
02/14/2024	6.1.1301.10	Resolved defect	Invoices	In case of retry policy being triggered during invoice generation, the InvoiceReport.xlsx files are created with correct data including all corresponding invoices.

Date	Version	Type	Features	Description
01/19/2023	6.0.1301.22	Enhancement	Invoices	The Invoice generation process has been optimized. In case the corresponding API Services get down due to any temporary environmental or connectivity issues during the invoice generation, any invoices stuck in progress will be retried by the Invoice Generator Agent as soon as the Services are back up and running.
01/19/2023	6.0.1301.22	Enhancement	Invoices	'Do not show Date of Invoice' option is available in the Invoice Template. If enabled, the date of the actual generation will not show up on the Invoice PDFs.
11/10/2022	5.5.1301.18	New feature	Reports	A new "Split Users Fees Across Workspaces" option is available in the Profile. Once enabled, the user fees with Per Client or Per Matter charge level will be split equally across the corresponding workspaces. As a result, the total users costs for each client will be calculated through dividing the monthly user fee by the number of workspaces each user has access to.
11/10/2022	5.5.1301.18	New feature	Invoices	A new "Consider Storage Type" option is available in the Invoice Template on Invoice Item level. If enabled, the storage type will be additionally considered upon items' aggregation and the corresponding name of the storage type (Review, Repository, Cold Storage) will be displayed after the actual billing item name.
11/10/2022	5.5.1301.18	Enhancement	Invoices	Per Client Invoice generation is now allowed also with Workspace Template when Workspace breakdown was used in the corresponding reports.
11/10/2022	5.5.1301.18	Enhancement	Agents	A retry policy has been applied in case disturbances related to the Relativity Object Manager occur.
11/10/2022	5.5.1301.18	Enhancement	Agents	MaxBilling Admin Object Sync agent run interval has been increased from 60 to 3599 seconds.
11/10/2022	5.5.1301.18	Enhancement	Agents	MaxBilling Schedule agent run interval has been increased from 3600 to 43200 seconds.
09/08/2022	5.4.1301.8	Resolved defect	Storage Type	Repository workspaces' hosting size (Publish Data File Size) is calculated according to the corresponding Repository formula in billing Profiles where both Storage Type options are enabled.
08/01/2022	5.3.1301.11	Enhancement	Pricings	A new column Item Expiration Date is added to Tasks Tab in Pricing under Profiles.

Date	Version	Type	Features	Description
08/01/2022	5.3.1301.11	Enhancement	Reports	The Report Summary (Workspace Breakdown).xlsx report file now shows the Relativity workspace name and the Artifact ID separated into two columns.
08/01/2022	5.3.1301.11	Resolved defect	Reports	When a Repository workspace has been moved to Cold Storage, any applied Storage Type Configurations will consider the Cold Storage formula over the Repository formula.
08/01/2022	5.3.1301.11	Enhancement	Workspaces	A new column Status Name has been added to MXB Workspaces view (MaxBilling -> Workspaces tab).
06/06/2022	5.2.1301.13	Compatibility change	UI	All MaxBilling Object Types with Null values in "Use Relativity Forms" field have been set to 'No' value in relation to the Relativity Classic Forms removal in RelativityOne.
06/06/2022	5.2.1301.13	New feature	Dashboard	A new 'Committed Size and Utilization' widget type is added to MaxBilling Dashboard. It allows users to track their hosting commitment and utilization considering the different storage types (Review, Repository, Cold Storage). The table shows data for the last 12 months.
06/06/2022	5.2.1301.13	New feature	Pricings	A new Pricing Type "Exclude Workspace Statuses" is now available. The workspaces with the corresponding statuses will be skipped upon the report generation.
04/11/2022	5.1.1301.13	New feature	Tiered Pricing	A new "Flat Fee Expires On:" option is available when a Tiered Pricing is being set up for Case Rollup items. The quoted expiration date refers to any tiers with a Tier Fee Type: Flat. The flat fees will be applied in the reports until the expiration date hits (i.e. the expiration date is earlier than the start date of the report).
04/11/2022	5.1.1301.13	Enhancement	Agents	MaxBilling agents are capable to work on the new RelativityOne compute infrastructure as well as on the Relativity Agents Servers infrastructure. If the Relativity instance has been migrated to the RelativityOne compute infrastructure, any errors and warnings coming from the MaxBilling Agents are logged into the EDDSLogging data base. Otherwise, any errors, warnings as well as additional information coming from the MaxBilling agents are logged in files that are stored under C:\TSDLogs\MaxBillingInstance\Agents on the corresponding Agents Server, as it has been until now.

Date	Version	Type	Features	Description
04/11/2022	5.1.1301.13	Enhancement	Case Rollup Statistics	DtSearch billing item statistics collection has been enhanced to skip any duplicated entries in case such had retained in the corresponding data base upon incremental runs.
04/11/2022	5.1.1301.13	Resolved defect	Analytics Statistics	Analytics items statistics is now collected for deleted workspaces.
04/11/2022	5.1.1301.13	Enhancement	Reports	New "Report Start Date" and "Report End Date" columns have been added in the ExportData.xlsx report files (ExportData, ExportData-Matters, ExportData-Clients).
04/11/2022	5.1.1301.13	Enhancement	Reports	A new "User Artifact ID" column has been added to the ExportData.xlsx report files (ExportData, ExportData-Matters, ExportData-Clients). The column is populated for the single users report items.
04/11/2022	5.1.1301.13	New feature	Reports	A new "Item Expires On:" option is available when any static Tasks items are being added to the Profile. The static Tasks items will be included in the reports until the expiration date hits (i.e. the Item's expiration date is earlier than the start date of the report).
04/11/2022	5.1.1301.13	Enhancement	Invoices	"Report Id" column is presented in the Invoices view to provide information about the Reports which correspond to each Invoice.
04/11/2022	5.1.1301.13	Enhancement	Reports	When any flat fees were applied in the reports and the invoices, the corresponding description ('Flat Fee') is included in the report/invoice item names.
04/11/2022	5.1.1301.13	New feature	Tiered Pricing	A new custom free text field "Tier Notes" is now available when users create new Pricing Tiers.
01/31/2022	5.0.1301.19	Enhancement	Workspaces meta-data	Additional information about the workspaces is available in the MaxBilling Workspaces view: <ul style="list-style-type: none"> <li>* Workspace ID</li> <li>* Client Name and Number</li> <li>* Matter Name and Number</li> <li>* Keywords</li> <li>* Notes</li> <li>* Custom Notes (free text)</li> </ul>
01/31/2022	5.0.1301.19	Enhancement	Profile	Instance type of Profile has been removed. Existing Instance Profiles are switched to All Clients Profile type.
01/31/2022	5.0.1301.19	Enhancement	Tiered Pricing	Up to 7 Price Tiers can be used when applying tiered pricings.

Date	Version	Type	Features	Description
01/31/2022	5.0.1301.19	Enhancement	Report	"One aggregated report for the whole Relativity Instance" report type has been removed. Instance Breakdown is allowed for "One aggregated report for all clients on the profile" report types.
01/31/2022	5.0.1301.19	New feature	Case Rollup Statistics	New billing items - Audit Record Count and Audit Record Size have been added to the Case Rollup billing category.
01/31/2022	5.0.1301.19	New feature	Dashboard	New "Hosting and Users with Access" widget type is now available in MaxBilling Dashboard tab.
11/9/2021	4.8.1301.15	New feature	Profile	A new option - "Round Up Usage To The Nearest Whole Number" has been added in the Profiles. Once enabled, it rounds up all usage amounts to the nearest whole number. The currency calculations will be applied after the rounding.
11/9/2021	4.8.1301.15	Enhancement	Pricings	Client and Matter Name and Number information is displayed when adding workspaces or Matters to Specific Pricings.
11/9/2021	4.8.1301.15	Enhancement	Invoices	Client and Matter Name and Number information is displayed when adding workspaces or Matters to Invoice Mappings.
11/9/2021	4.8.1301.15	Enhancement	Reports	Users Items listing in the PDF and Excel report files has been enhanced, providing summarized information about the total count as well as listing the actual users' emails that had been considered for billing.
11/9/2021	4.8.1301.15	Enhancement	Dashboard	User Type is considered in the Report Data Widgets tables when aggregating the users' charges and displayed accordingly.
11/9/2021	4.8.1301.15	New feature	Case Flow Statistics	A new billing item - ECA Promotion File Size (Native) - has been added in Case Flow category. It captures the Native files size of the documents that were promoted to the corresponding Workspace via RIP when "Copy Natives - Physical Files" option was selected in the corresponding Integration Point.
11/9/2021	4.8.1301.15	New feature	Case Flow Statistics	A new billing item - ECA Promotion File Count (Native) - has been added in Case Flow category. It captures the Native files count of the documents that were promoted to the corresponding Workspace via RIP when "Copy Natives - Physical Files" option was selected in the corresponding Integration Point.

<b>Date</b>	<b>Version</b>	<b>Type</b>	<b>Features</b>	<b>Description</b>
11/9/2021	4.8.1301.15	Enhancement	Invoices	The "Include 0.00" option is available for Invoice Items that are a combination between multiple report items.
11/9/2021	4.8.1301.15	Enhancement	Custom statistics	Client Name information is available in the Work Statistic view. It is populated automatically for the corresponding Workspaces.
11/9/2021	4.8.1301.15	Enhancement	Custom statistics	A new "Work Details" field is available in the Work Statistics layout to add information in free text regarding the particular statistics entry.
08/30/2021	4.7.1301.35	Resolved defect	Dashboard	MaxBilling Report Data widgets display correct aggregation of billing items with the same rate.
08/30/2021	4.7.1301.35	Resolved defect	Dashboard	MaxBilling Usage Data widgets consider correctly the corresponding MaxBilling configuration and display the Publish Data size according to the installation scope.

Date	Version	Type	Features	Description
08/19/2021	4.7.1301.31	New feature	Language Services	<p>New billing category - Language Services - is available in the Profiles. The billing items in Language Services allow for reporting and invoicing for the following billing items:</p> <ul style="list-style-type: none"> <li>· Ubiquis Translation File Count – The Native Files’ count of the Documents, that were sent to Ubiquis, when the corresponding sets are completed.</li> <li>· Ubiquis Translation File Size – The Native Files’ size of the Documents, that were sent to Ubiquis, when the corresponding sets are completed.</li> <li>· Ubiquis Translation Text Only Count – The count of the Files, that were sent to Ubiquis with text only, when the corresponding sets are completed.</li> <li>· Ubiquis Translation Text Only Size – The size of the text that was sent to Ubiquis, when the corresponding sets are completed.</li> <li>· Ubiquis Translation Words – The count of the words that were translated in Ubiquis, when the corresponding sets are completed.</li> <li>· Ubiquis Transcription File Count – The Native Files’ count of the Documents, that were sent to Ubiquis, when the corresponding sets are completed.</li> <li>· Ubiquis Transcription File Size – The Native Files’ size of the Documents, that were sent to Ubiquis, when the corresponding sets are completed.</li> <li>· Ubiquis Transcription Text Only Size – The size of the text that was received from Ubiquis, when the corresponding sets are completed.</li> <li>· Ubiquis Transcription Hours – The duration of the media files that were transcribed in Ubiquis, when the corresponding sets are completed.</li> </ul>
08/19/2021	4.7.1301.31	New feature	Tiered Pricing	<p>New option for setting up Tiers Charge Level is available. It allows applying flat fees on a Matter/Client level or using different currency rates based on the usage amount that was utilized on a Matter or a Client Level.</p>
08/19/2021	4.7.1301.31	New feature	Pricings	<p>New Pricing types - Exclude Matters and Exclude Clients are available in the Profiles so the corresponding workspaces that belong to the selected Matters or Clients can be skipped upon the Reports generation.</p>

Date	Version	Type	Features	Description
08/19/2021	4.7.1301.31	New feature	Reports	The relation between the Repository and the Review workspaces in the Maxbilling Reports is displayed in a designated column - Linked Workspaces. The column is available in the Workspaces breakdown as well as in the ExportData.xlsx report files. It is populated for the Review workspaces where linked data is present, showing the corresponding Repository workspaces and the GBs that were linked from them.
06/11/2021	4.6.1301.14	Enhancement	Case Flow Statistics	Case Flow Statistics collection SQL query has been optimized to prevent timeouts when large Structured Analytics Sets are collected.
06/11/2021	4.6.1301.14	New feature	Invoices	A new option 'Skip Zero Invoice Generation' is available in MaxBilling -> Settings -> Invoice Settings. When enabled, invoices with 0.00 totals will not be generated. The option is not selected by default, so 0.00 invoices will be generated as until now, unless the feature is activated by the end user.
06/11/2021	4.6.1301.14	Enhancement	Users Statistics	The Users charges are displayed aggregated in the Report Breakdowns as well as in the Widget tables. The Relativity Users who were charged appear with their emails only in the report files.
06/11/2021	4.6.1301.14	Enhancement	Users Statistics	Filter Behavior Include option of the User charges in the Profile allows billing only for users from the selected Groups and/or Domains.
06/03/2021	4.5.1301.22	Resolved defect	Processing Statistics	Check for null date has been added in order to prevent errors when reporting for Processing Data Sources with no Last Activity date.
05/24/2021	4.5.1301.21	Enhancement	Case Flow Statistics	Case Flow Statistics collection SQL query has been optimized to prevent locking the File table while reading the corresponding statistics.
05/11/2021	4.5.1301.17	Resolved defect	Reports	* Custom reports - tiered price type is applied correctly in custom report files of type _Report_File_Detailed.xlsx
05/10/2021	4.5.1301.16	Enhancement	Reports	* Custom reports - deleted workspace which belongs to a Client with no other workspaces is listed correctly in Custom report files of type _Report_File_Detailed.xlsx
05/05/2021	4.5.1301.15	Enhancement	Users Statistics	End users can specify Domains and Groups to be excluded from the reports within the same Users charge.



Date	Version	Type	Features	Description
05/05/2021	4.5.1301.15	Enhancement	Reports	* Custom reports - special characters in the name of the custom report files of type Report [Client Name]([Client Number]).xlsx are trimmed to align with the excel sheet naming restrictions
04/23/2021	4.5.1301.12	Enhancement	Invoices	Combine Invoice items option now aggregates the invoice items based on their names (both custom and system) regardless of if a tiered price was used or not for the corresponding report item.
04/08/2021	4.5.1301.10	Enhancement	Invoices	When Invoices for Workspace are generated from a report with Workspace breakdown, the Workspace name is not present in the billing items section of the Invoice. When Invoices for Matter are generated from a report with Matter breakdown, the Matter name is not present in the billing items section of the Invoice.
04/02/2021	4.5.1301.9	Enhancement	Invoices	Invoices for Matter can be generated from a report with Workspace breakdown. Invoices for Client can be generated from a report with Workspace or Matter breakdown.
04/02/2021	4.5.1301.9	Enhancement	Invoices	Attorney Information and Relativity Client Information can be shown simultaneously on the Invoices PDFs (they worked alternatively until now). For that purpose, the new Additional Information field should be utilized upon Invoice generation.
04/02/2021	4.5.1301.9	New feature	Case Flow Statistics	New billing items - Structured Analytics Set File Count (Natives) and Structured Analytics Set File Size (Natives) have been added to the Case Flow billing category. These items capture the count and the size of the Native files of the Documents included in the Structured Analytics Sets that were run during the period.
04/02/2021	4.5.1301.9	New feature	Case Flow Statistics	New billing items - Structured Analytics Set File Count (Images) and Structured Analytics Set File Size (Images) have been added to the Case Flow billing category. These items capture the count and the size of the Image files of the Documents included in the Structured Analytics Sets that were run during the period.

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04/02/2021	4.5.1301.9	New feature	Users Statistics	<p>Users can be excluded from the MaxBilling reports based on their email domain. To exclude specific domains from the reports, populate the new Domain field in the Users Pricing Item in the Profile. Users can be excluded from the MaxBilling reports based on their email domain. To exclude specific domains from the reports, populate the new Domain field in the Users Pricing Item in the Profile.</p>
02/15/2021	4.4.1301.8	New feature	Workspaces meta-data	<p>A new tab - Workspaces - is visible in MaxBilling. It shows the synchronized workspaces which MaxBilling will report for as well as some new additional meta-data regarding Locations and Billable status. By default the workspaces' meta-data is synchronized by the MaxBilling Admin Object Sync Agent based on the information populated in the Workspaces' Keywords field, following a specific convention. End users are allowed to disable the synchronization for specific workspaces or for all workspaces. The synchronization can be disabled by either editing a single entry in Workspaces tab or using the mass edit option and to continue maintaining the meta-data manually. The 'Disable Agent Synchronization' option disables only the meta-data synchronization (Locations and Billable Status) and does not affect the general Workspaces' information which is required for reporting purposes. The automatic synchronization can be disabled at any time.</p>
02/15/2021	4.4.1301.8	New feature	Workspaces meta-data	<p>Locations meta-data is synchronized by the MaxBilling Admin Object Sync Agent automatically from the Workspaces' Keywords field using the following convention: [Location name] ; The first string value followed by a semi-colon in the Workspaces' Keywords field will be shown in the MaxBilling -&gt; Workspaces -&gt; Location.</p>

Date	Version	Type	Features	Description
02/15/2021	4.4.1301.8	New feature	Workspaces meta-data	Billable status meta-data is synchronized by the MaxBilling Admin Object Sync Agent automatically from the Workspaces' Keywords field using the following convention:; [Billable Status] ; Any string value containing '%bill%' between the first and the second semi-colon in the Workspaces' Keywords field will be synced as Yes in MaxBilling -> Workspaces -> Billable. Any string value containing '%no charge%' between the first and the second semi-colon in the Workspaces' Keywords field will be synced as No in MaxBilling -> Workspaces -> Billable. The Billable Status is synced as blank in all the other cases.
02/15/2021	4.4.1301.8	New feature	Profile	A new option - Filter Workspaces - is available on a Profile level. End users can specify if the Profile should work only with workspaces with specific Billable status. The Workspaces' Billable status is determined as Workspace meta-data in MaxBilling -> Workspaces.
02/15/2021	4.4.1301.8	New feature	Pricings	A new Pricing Type - Locations - is available. The existing Overwrite Type options (Overlay/Overwrite) are applicable for it. The Workspaces' Locations are determined as Workspace meta-data in MaxBilling -> Workspaces.
02/15/2021	4.4.1301.8	New feature	Reports	A new column - Billable - is available in the Report Workspace breakdown. It is populated with the corresponding Billable Status once such is set for any workspaces.
02/15/2021	4.4.1301.8	New feature	Reports	A new column - Locations - is available in the Report Workspace, Matter and Client breakdowns. It is populated with the corresponding Locations once such information is set for any workspaces.
02/15/2021	4.4.1301.8	New feature	Reports	A new column - Deleted On - is available in the Report Workspace breakdown. It is populated if a Workspace was deleted within the billing period.
01/27/2021	4.3.1301.13	Enhancement	Case Flow Statistics	Structured Analytics Document Count is the Documents count from the date when was the peak of the size for each set that was run within the reported period.
01/27/2021	4.3.1301.13	Enhancement	Case Flow Statistics	Structured Analytics Document Size is the peak value of the Extracted Text size of the Documents for each set that was run within the reported period.

Date	Version	Type	Features	Description
01/25/2021	4.3.1301.11	Resolved defect	Pricings	If a workspace was deleted and it was part of Exclude Type of Pricing, this workspace will be excluded correctly from the reports (when the deletion date was within the reported period)
01/19/2021	4.3.1301.10	Resolved defect	Pricings	When Advanced Threshold is applied, workspaces with 0.00 total charge are not shown in the report breakdown.
01/18/2021	4.3.1301.9	Resolved defect	Pricings	The workspaces which are not charged due to Advanced Threshold condition are not shown in the report breakdown.
01/15/2021	4.3.1301.8	New feature	Pricings	A new Advanced Thresholds option is available on a Pricing level. All workspaces which have usage amount below the specified for a particular item threshold value, will not be charged or they will be charged only for the selected in the Advanced Threshold billing categories.
01/15/2021	4.3.1301.8	New feature	Case Flow Statistics	New billing items - Structured Analytics Document Count and Structured Analytics Document Size (Extracted Text) have been added to the Case Flow billing category. These items capture the count and the Extracted Text size of the documents included in the Structured Analytics Sets that were run during the period (considering Name normalization, Language identification, Email threading, Textual near duplicate identification and Repeated content identification).
01/01/2021	4.2.1301.20	Resolved defect	Processing Statistics	A check if the Processing application is installed on the workspaces which will be included in the report and contain Processing information has been added.
12/02/2020	4.2.1301.19	Enhancement	Processing Statistics	All Processing Sets statuses are considered in the reports, based on the completion date and time of Inventory, Discovery and Publish phases. Until the current version, MaxBilling used to consider only the published Processing Sets.
12/02/2020	4.2.1301.19	New feature	Storage Type	Separate prices, based on the workspaces storage type (Review, Repository) can be set for each Processing billing item in the Profile. The prices will be applied accordingly during the report generation based on the storage type of each Workspace.
12/02/2020	4.2.1301.19	New feature	Pricings	New Pricing Types 'Specific Clients' and 'Specific Matters' are available. The existing Overwrite Type options (Overlay/Overwrite) are applicable for these new Pricing Types.

Date	Version	Type	Features	Description
11/18/2020	4.1.1301.21	Enhancement	Storage Type	Workspaces will not be considered as Repository workspaces if they did not have the Repository Workspace application installed even for a single day within the reported period.
11/06/2020	4.1.1301.20	Enhancement	Reports	* Custom reports - a new column Linked Total File Size was added in the _Report_File_Detailed.xlsx
11/06/2020	4.1.1301.20	Resolved defect	Reports	Overlay Pricing is correctly applied when the same billing item is present both in the Default Pricing and in the Overlay Pricing.
10/16/2020	4.1.1301.19	Enhancement	Reports	* Custom reports - a new column Publish File Size was added in the _Report_File_Detailed.xlsx* Custom reports - a rounding rule was added for the purpose of the _Report_File_Detailed.xlsx generation
09/30/2020	4.1.1301.18	New feature	Storage Type	<p>The ratio which specifies how the Cold Storage workspaces billable size will be adjusted is determined in MaxBilling Settings -&gt; Storage Type Configurations.</p> <p>The default value is 25 %.</p> <p>The following formula is applied: Publish Data File Size = Publish Data File Size * Cold Storage Ratio</p> <p>Once it is setup, to be considered in the reports, the rule should be enabled on a Profile level (instead of upon each report generation)</p>
09/30/2020	4.1.1301.18	New feature	Storage Type	<p>The formula which specifies how the Repository workspaces billable size will be adjusted is determined in MaxBilling Settings -&gt; Storage Type Configurations.</p> <p>You can choose between: Publish Data File Size = Linked Total File Size + (Publish Data File Size-Linked Total File Size) / 3 or Publish Data File Size = Publish Data File Size - Linked Total Billable File Size</p> <p>Once it is set up, to be considered in the reports, the rule should be enabled on a Profile level (instead of upon each report generation)</p>

Date	Version	Type	Features	Description
09/30/2020	4.1.1301.18	New feature	Storage Type	A new column Storage Type is available in the Workspace breakdown of the reports. It is populated with the corresponding storage type of each Workspace - Review, Repository or Cold Storage. The column is present also in the Report Summary (Workspace Breakdown).xlsxExportData.xlsx report files when you download the report.
09/30/2020	4.1.1301.18	New feature	Storage Type	Separate prices, based on the workspaces storage type (Review, Repository, Cold Storage) can be set for each Case Rollup billing item in the Profile. The prices will be applied accordingly during the report generation based on the storage type of each Workspace.
09/30/2020	4.1.1301.18	New feature	Invoices	The Invoice Mapping feature already works independently from the Invoice Recipient Information field. It can be utilized to send emails to mapped attorneys without populating attorneys' information in the Receivers' Information section of the invoices.
09/30/2020	4.1.1301.18	New feature	Invoices	The invoices are now sent via email in a single ZIP folder if the Email Recipient(s) field is populated when you generate invoices or set up a schedule. In the previous MaxBilling versions the invoices used to go out in separate emails. Separate emails will be sent only to the Mapped Attorneys emails, if "Send Invoice to Mapped Attorneys" is selected. Email with the ZIP file will not be sent to mapped attorneys.
08/20/2020	4.0.1301.45	Resolved defect	Case Rollup	Extracted Text Size usage is backfilled for correct MB/GB/TB conversion.
08/19/2020	4.0.1301.44	Resolved defect	Invoices	Invoices which were generated with previous MaxBilling versions can now be downloaded and sent via email using the Invoice console buttons.
08/05/2020	4.0.1301.41	New feature	MaxBilling Configuration	MaxBilling can be installed on multiple workspaces within a Relativity instance. MaxBilling Configuration Object is created on Admin level. Each MaxBilling installation, except for the base one, works for specific Client(s)/Client Domain(s) only. The scope of the installation is specified by the users in the MaxBilling Configuration by adding the corresponding Client IDs. To setup your MaxBilling Configuration please contact support@tsd.com

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08/05/2020	4.0.1301.41	Enhancement	System	The latest Gravity version using Object Manager for updating fields is integrated in MaxBilling.
08/05/2020	4.0.1301.41	Enhancement	Installation	MaxBilling PostInstall Upgrader agent requires to be created manually upon initial MaxBilling installation.
08/05/2020	4.0.1301.41	Enhancement	Installation	The auto-insertion of Sample Billing Profile is removed.
08/05/2020	4.0.1301.41	Enhancement	Installation	MaxBilling Salesforce Data Tier Syncer agent is not created automatically upon MaxBilling installation.
08/05/2020	4.0.1301.41	Enhancement	Installation	Stage Fence Statistics Collector agent is not created automatically upon MaxBilling installation.
08/05/2020	4.0.1301.41	Enhancement	Installation	Account Key, Account Name and Table Name Instance settings in kCuraDashboard.AzureConnectionSettings section are not created automatically upon MaxBilling installation.
08/05/2020	4.0.1301.41	Enhancement	Stage Fence	Account Key, Account Name and Table Name Instance settings in kCuraDashboard.AzureConnectionSettings section can be encrypted.
08/05/2020	4.0.1301.41	Enhancement	Repository Storage	Once Consider Repository Workspace option is selected upon report generation, Publish Data File Size billing item will be recalculated using the below formula, if a Workspace is Repository: Publish Data File Size (repo) = Linked Total Billable File Size + (Publish Data File Size (standard) - Linked Total Billable File Size) / 3Repository storage is not reflected in other billing items. Only the usage amount for Publish Data File Size is recalculated.* Publish Data File size (GB) = Total Billable File Size + (Document Count Text Only/4000)
08/05/2020	4.0.1301.41	Enhancement	Cold Storage	New Cold Storage Ratio field is available in the Report Generation layout. It is visible when Consider Cold Storage option is selected. Once Consider Cold Storage option is selected upon report generation, Publish Data File Size usage will be recalculated based on a Cold Storage Ratio %, if a Workspace was in Cold Storage for the reported period.If Consider Cold Storage option is selected but no Cold Storage Ratio is specified by the users, the default ratio value (25%) will be applied.Publish Data File Size (cold) = Publish Data File Size (standard) * Cold Storage Ratio* Publish Data File size (GB) = Total Billable File Size + (Document Count Text Only/4000)

Date	Version	Type	Features	Description
08/05/2020	4.0.1301.41	New feature	Case Rollup	New billing items are available in Case Rollup Category:- Linked Total Billable File Size - Total data that has been promoted into the Workspace via links- Linked Image File Size - Data linked to Image files that has been promoted into the Workspace via links- Linked Native File Size - Data linked to Native files that has been promoted into the Workspace via links- Linked Production File Size - Data linked to Production files that has been promoted into the Workspace via linksLinked sizes usage is reported for non-Repository Workspaces only.
08/05/2020	4.0.1301.41	New feature	Case Rollup	New billing item is available in Case Rollup category - Data Grid File Size. The item captures the sum of all files stored in Data Grid per workspace.
08/05/2020	4.0.1301.41	Enhancement	Reports	Pending and Generating State of Reports is now visible in the Reports view (MaxBilling->Reports)
08/05/2020	4.0.1301.41	Enhancement	Invoices	Pending and Generating State of invoices is now visible in the Invoice view (MaxBilling->Invoices)
08/05/2020	4.0.1301.41	Enhancement	Custom statistics	User Type field is available when you create new MXB Work Statistics Item and select Requested By value.
06/15/2020	3.1.1301.39	New feature	Pricings	New Copy Pricing option is available in the Profiles' Pricing section to allow quick pricings multiplication.
06/15/2020	3.1.1301.39	New feature	Case Flow Statistics	New billing item in Case Flow category - Production Set File Size (Natives) is available. The item captures the size of the native files of the produced documents.
06/15/2020	3.1.1301.39	New feature	Case Flow Statistics	New billing item in Case Flow category - Production Set File Count (Natives) is available. The item captures the count of the native files of the produced documents.
06/15/2020	3.1.1301.39	New feature	Case Flow Statistics	New billing item in Case Flow category - Production Set File Size (Extracted Text) is available. The item captures the Extracted Text size of the of the produced documents.
06/15/2020	3.1.1301.39	New feature	Case Flow Statistics	New billing item in Case Flow category - Production Set Document Count is available. The item captures the count of the produced documents.
06/15/2020	3.1.1301.39	Enhancement	Reports	Deleted Workspaces and Users are already considered during the report generation. Once the date of deletion is after the start billing period date, they will be included in the reports with the corresponding statistics information.



Date	Version	Type	Features	Description
06/15/2020	3.1.1301.39	Enhancement	Email	Text formatting options are available in the email body field of the Email Templates in MaxBilling Settings.
06/15/2020	3.1.1301.39	Enhancement	Users Statistics	A new option to select from all user types, along with Internal and External, is already available in the Users' charges, included in the billing profile. If not selected, all types are considered.
06/15/2020	3.1.1301.39	Enhancement	Invoicing	"Static Quantity" invoice Item option is deprecated. The item quantity is taken from the corresponding report.
06/15/2020	3.1.1301.39	New feature	Invoicing	New option "Aggregate All of Same Type" is available for the invoice items in the Invoice Templates. When selected, the items of the same type will be aggregated on the same invoice line, if they are present in the corresponding report with different prices. Upon upgrade it will be set as non-selected for the existing items.
06/15/2020	3.1.1301.39	New feature	Invoicing	New option "Include 0.00" is available for the invoice items in the Invoice Templates. When selected, the items will be included in the invoice with 0.00 if there is no usage in the corresponding report. Upon upgrade it will be set as non-selected for the existing items.
06/15/2020	3.1.1301.39	Resolved defect	Case Rollup Statistics	Extracted Text Size usage is already collected when stored in Data Grid, along with SQL.
05/14/2020	3.1.1301.25	New feature	Dashboard	New widgets showing Report Data are available in Dashboard tab. Select a Profile, Client and Report and the corresponding report data will be loaded on the chart along with a detailed information on a billing item level in a table below the widget. You can click on the chart's layers to switch between Report Total, Client, Matter, Workspace breakdowns.
05/14/2020	3.1.1301.25	Enhancement	Tabs	Usage Data Tab is renamed to Dashboard, containing new Report Data widgets.
05/14/2020	3.1.1301.25	New Feature	Email Templates	You are now able to customize the emails sent from MaxBilling. Email Template section is added to MaxBilling Settings. With no changes or templates added, the emails will be sent according to the default values.
05/14/2020	3.1.1301.25	New Feature	Reports	Workspace Artifact ID is now included in a designated column in ExportData report file.
05/14/2020	3.1.1301.25	New Feature	Customer Code	You can now unlock a specific functionality to be available only for you, using your customer code.

Date	Version	Type	Features	Description
05/14/2020	3.1.1301.25	Enhancement	Reports	Minimal/Maximal Cap is still applied on a Workspace level but it is now considered for all report breakdowns.
05/14/2020	3.1.1301.25	Enhancement	Invoicing	Invoice prefix is included in the invoice file name, in front of the invoice number.
05/14/2020	3.1.1301.25	Enhancement	Settings	Settings Tab content is reorganized within three sections, related to General Settings, Invoice Settings, Email Settings.
05/14/2020	3.1.1301.25	Enhancement	Reports	" ' " symbol is added automatically in the beginning of each cell, containing text, in all the excel report files, to prevent from potential formula injection.
04/15/2020	3.1.1301.11	New Feature	Custom statistics	You can now add your own statistics about any custom tasks which will be included in the billing reports under Tasks billing category.
04/15/2020	3.1.1301.11	New Feature	Custom statistics	You can now add your custom tasks to MaxBilling billing item types under Settings, allowing you to add them into your billing profile afterwards.
04/15/2020	3.1.1301.11	Enhancement	Invoicing	Regular Invoice functionality and "Invoices" tab were removed. "Customizable Invoices" tab is renamed to "Invoices". "Generate Customizable Invoice" button is renamed do "Generate Invoice". If you used to be using the old invoicing functionality download your existing Invoices before upgrade if you need to have them stored. Creating a Workspace Template type will let you keep your existing invoicing workflow. For any assistance contact <a href="mailto:support@tsd.com">support@tsd.com</a> or check MaxBilling user guide.
04/15/2020	3.1.1301.11	New Feature	Invoicing	An option to download multiple invoices to a ZIP file is already available as a mass operation in Invoices tab.
04/15/2020	3.1.1301.11	New Feature	Invoicing	New Invoice Report Excel file is already available for download in the Report console for all reports with Workspace/Matter/Client breakdown, once they were invoiced.
04/15/2020	3.1.1301.11	Enhancement	Invoicing	The following special characters in the invoice file name are replaced with empty string: ":", "!", "#", "\$", "/", " ", "+", "=", ":", "\\", "?", " ", "&", "~", "^", "%", "{", ">", "<", "[", "]", ";"

Date	Version	Type	Features	Description
04/15/2020	3.1.1301.11	Enhancement	Invoicing	The title of Invoices is changed as follows: * Invoices for Clients: Invoice [number] for client [number] * Invoices for Matters: Invoice [number] for matter Client[number] .Matter[number] * Invoices for Workspaces: Invoice [number] for workspace [Name] * Invoices for the whole report: Invoice [number] for report [Name]
04/15/2020	3.1.1301.11	Enhancement	Invoicing	Invoice items, which are added with a Selected Type Item Name to the invoice template, will be included in the invoices, if they are present in the corresponding billing reports. Items which are added with a Custom name to the invoice template, will always be included in the invoices, regardless they are present in the corresponding billing reports or not. If the items are not present in the billing report, they will appear in the invoice with 0.00 quantity and total.
04/15/2020	3.1.1301.11	Enhancement	Invoicing	Invoice information regarding month of the invoice and matter/client number or workspace/report name is added to the subject line of the email when sending invoices. Month value considers the Billing Period Start Date.
04/15/2020	3.1.1301.11	Enhancement	Tabs	Billing Profiles tab is renamed to Profiles.
04/15/2020	3.1.1301.11	Enhancement	Tabs	Tier Pricings tab is renamed to Thresholds.
03/27/2020	3.0.1301.36	Enhancement	Reports	Users are now able to charge based on TB unit. KB unit is no longer supported. All the existing items using KB in the billing profiles will be switched to TB upon upgrade.
03/27/2020	3.0.1301.36	Enhancement	Users Statistics	Audit records are no longer used for the purpose of Users' login statistics collection.
03/27/2020	3.0.1301.36	New Feature	Case Rollup Statistics	A new Charge Level - Current Value - is available for all Case Rollup Items. The usage amount value of the items with Current Value charge level is considered as it was at the end date of the reported period.
03/27/2020	3.0.1301.36	Enhancement	Reports	Workspace accessibility is considered during reports' generation. If a workspace is not accessible during the report generation, this workspace will be skipped, without affecting the process of generation itself.

Date	Version	Type	Features	Description
03/27/2020	3.0.1301.36	Enhancement	Consistency Check	MaxBilling Consistency Checker Agent is removed. The necessary validations are ensured via Post-save Event Handlers.
03/27/2020	3.0.1301.36	Enhancement	Customizable invoices	When creating a new invoice template of type Report/Client/Matter/Workspace, after saving, the necessary invoice items are added automatically with default values.
03/27/2020	3.0.1301.36	Resolved defect	Customizable invoices	Individual Report/Pricing items invoice template now can be used for report billing items which have tiered pricing type.
03/27/2020	3.0.1301.36	Enhancement	Customizable invoices	GB and TB can be added as invoice item's units in the invoice templates.
03/27/2020	3.0.1301.36	Enhancement	Customizable invoices	Invoice Start Number field accepts any characters, once the last character is a digit. Upon each invoice generation, the digit is being incremented, and the rest of the characters are kept.
03/27/2020	3.0.1301.36	Enhancement	Customizable invoices	When using Individual Report/Pricing items Template, containing items which are not included in the related report, these items will not appear in the invoice, although they are included in the template. Thus the "zero" lines are avoided.
03/27/2020	3.0.1301.36	Enhancement	Reports generation	MaxBilling reports' generation process is optimized ensuring a better performance.
03/27/2020	3.0.1301.36	Enhancement	System	Reporting performance of batch operations was implemented to provide metrics for statistics collection and report generation processes.
02/25/2020	3.0.1301.13	Enhancement	Case Flow Statistics collection	Audit records are no longer used for the purpose of Imaging, OCR and Production Sets count and size statistics collection.
02/07/2020	3.0.1301.10	Enhancement	System	Reduced audit records count generated by MaxBilling agents improving the overall performance.
02/07/2020	3.0.1301.10	Enhancement	System	The latest Gravity version is integrated.
02/07/2020	3.0.1301.10	Enhancement	Consistency Check	Deleting Workspaces, belonging to a Specific or Exclude Pricing does not cause billing Profile Inconsistency.
02/07/2020	3.0.1301.10	Enhancement	Reports	Deleted Workspaces are shown in the reports with the corresponding statistics information during the billing period, if any.
02/07/2020	3.0.1301.10	Resolved defect	Case Rollup Statistics	Available DB Size, Used DB Size and Extracted Text Size statistics calculation does not utilize "sp_spaceused", which is not allowed in all workspaces.

Date	Version	Type	Features	Description
02/07/2020	3.0.1301.10	New Feature	Processing Statistics	New charge level "Per Set" is available for all Processing billing items. This option allows reporting the Processing information on a deeper level - per Processing Set.
02/07/2020	3.0.1301.10	Resolved defect	Users Statistics	Users who were part of a User Group which was to be excluded from the charge continue to be excluded from the reports after they were deleted.
02/07/2020	3.0.1301.10	Resolved defect	Users Statistics	User Charge Priority order now allows multiple user charges in one Pricing.
02/07/2020	3.0.1301.10	Enhancement	Users Statistics	User Charge Priority order value restriction is on a Billing item level within a Pricing.
02/07/2020	3.0.1301.10	Enhancement	Dashboards	Stage Fence Dashboard is no longer supported (RelativityOne).
02/07/2020	3.0.1301.10	New Feature	Reports	Relativity Client number and Matter number information is shown in designated columns in the report breakdowns.
02/07/2020	3.0.1301.10	New Feature	Reports	Workspace Status field is shown in a designated column in the report Workspace breakdown.
02/07/2020	3.0.1301.10	New Feature	Reports	Relativity Client number and Matter number information is shown in designated columns in Report Summary (Workspace Breakdown).xlsx report file.
02/07/2020	3.0.1301.10	New Feature	Reports	New excel report file ExportData-Matters.xls is available upon reports download. The new file shows report information summarized on a Matter basis
02/07/2020	3.0.1301.10	New Feature	Reports	New excel report file ExportData-Clients.xls is available upon reports download. The new file shows report information summarized on a Client basis
02/07/2020	3.0.1301.10	New Feature	Customizable invoices	You can view and click the last 5 custom invoices from the report layout.
02/07/2020	3.0.1301.10	New Feature	Customizable invoices	Reported period information is available in the customizable invoices showing the billing period which the invoice refers to.
02/07/2020	3.0.1301.10	New Feature	Customizable invoices	Client and Matter numbers and names are shown the customizable invoices names for the invoices of type "For Clients" nad "For Matters"
02/07/2020	3.0.1301.10	New Feature	Customizable invoices	Client and Matter numbers and names are shown the customizable invoices billing information section when Client or Matter templates were used upon the invoice generation.
10/9/2019	2.3.1301.298	Enhancement	System	Permission checks are applied when users download billing reports.

Date	Version	Type	Features	Description
10/9/2019	2.3.1301.298	Enhancement	Reports	Discount field in the PDF reports is shown only when there is a discount value.
10/9/2019	2.3.1301.298	Enhancement	Invoicing	Discount field in the PDF customizable invoices is shown only when there is a discount value.
9/24/2019	2.3.1301.295	Enhancement	System	If errors occur on custom page, users see standard error page.
8/9/2019	2.3.1301.293	Resolved defect	Tiered Pricing option	Tiered pricing option is now being correctly applied on a workspace basis for any Processing billing items.
8/9/2019	2.3.1301.293	Resolved defect	System	Daily Statistics Collector agent does not cause any locking issues in the Workspaces data base.
8/9/2019	2.3.1301.293	Enhancement	System	Queries generated by MaxBilling Daily Statistics Collector Agent are optimized to ensure better performance.
07/16/2019	2.3.1301.290	New Feature	Maximum Workspace Cap	Users are now allowed to set a maximum workspace value which will be applied in the reports' total in case the total workspace report value is exceeding the Maximum Workspace Cap. The Maximum Workspace Cap is being set on a pricing level.
07/16/2019	2.3.1301.290	New Feature	Minimum Workspace Cap	Users are now allowed to set a minimum workspace value which will be applied in the reports' total in case the total workspace report value is below the Minimum Workspace Cap. The Minimum Workspace Cap is being set on a pricing level.
07/16/2019	2.3.1301.290	New Feature	Tiered Pricing option	Users are now allowed to set up to 3 thresholds when adding billing items and to charge according to the items' usage, by using different prices for each threshold (tier).
06/20/2019	2.3.1301.249	New Feature	Repository and Cold Storage workspaces usage	Repository and Cold Storage workspaces' usage is being considered accordingly and the storage size is recalculated if "Consider Repository Workspace" and "Consider Cold Storage" options are selected on a report generation (applicable for Relativity@One).
04/24/2019	2.3.1301.177	Resolved defect	Agents logs	MaxBilling agents are logging information for Client, Matter and Workspace artifact IDs only.
04/24/2019	2.3.1301.177	Resolved defect	Emailing functionality	MaxBilling users are now able to send billing reports and invoices via email.

Date	Version	Type	Features	Description
02/06/2019	2.3.1301.126	New Feature	Stage Fence file size report item	Statistics for Stage Fence file size report item is now collected from multiple hosts. A new folder StageFenceWorkspaces should be created on each host. Then sub-folders named after the Workspace Artifact IDs should be created in it. The Stage Fence data for the relevant workspace must be stored in its designated folder. Only stage fence data that is stored in the way described above will be considered for the Stage Fence pricing items in MaxBilling. Any other stage fence data (anywhere else in the FileShare) will not be considered for the Stage Fence pricing items in MaxBilling. (applicable in Relativity®One).
01/09/2019	2.3.1301.101	Resolved defect	Case Flow Statistics collection	Allowing "-" symbol in workspaces' name.
01/04/2019	2.3.1301.98	Resolved defect	Processing report generation	Removed check for Custodian table when collecting information for processing billing items.
11/29/2018	2.3.1301.85	New Feature	New Pricing Item under Case Flow category – Production branding	The count of the production brands per page.
11/29/2018	2.3.1301.85	New Feature	New Pricing Item under Case Flow category – ECA Promotion File Size (Inbound)	File size of the documents promoted from one workspace to another workspace via RIP.
11/29/2018	2.3.1301.85	New Feature	New Pricing Item under Case Flow category – ECA Promotion File Count (Inbound)	File count of the documents promoted from one workspace to another workspace via RIP.
11/29/2018	2.3.1301.85	New Feature	New Pricing Item under Case Flow category – RDC Import File Size	File size of the documents (images or natives) imported via RDC (Image Load File, Document Load File, Production Load File).
11/29/2018	2.3.1301.85	New Feature	New Pricing Item under Case Flow category – RDC Import File Count	File count of the documents (images or natives) imported via RDC (Image Load File, Document Load File, Production Load File).
11/29/2018	2.3.1301.85	Enhancement	OCR and Imaging category is renamed to Case Flow	OCR and Imaging pricing item category is renamed to Case Flow.
10/19/2018	2.3.1301.53	Enhancement	Agents	A retry policy with default values seconds intervals for MaxBilling Agents functionality is implemented.
10/19/2018	2.3.1301.53	Enhancement	Report Generation consistency	The ability to include more than one report breakdown on report generation is restricted.
09/20/2018	2.3.1301.44	Enhancement	Reviewers Pricing Items Category	Reviewers Pricing Items Category is temporary removed.
09/20/2018	2.3.1301.44	New Feature	SalesForce data tier synchronization	Data tier value in MaxBilling settings is synchronized by "MaxBilling Salesforce Data Tier Syncer Agent" according to the information in Salesforce Data Contract. (available in Relativity®One only)

Date	Version	Type	Features	Description
08/10/2018	2.3.1301.21	New Feature	New Invoicing functionality	Ability to generate manually and automatically customizable invoices based on the billing reports using mappings and templates.
08/10/2018	2.3.1301.21	New Feature	New Pricing Item – Production Set File Size	The file size of the produced documents.
08/10/2018	2.3.1301.21	New Feature	New Pricing Item – Production Set File Count	The file count of the produced documents.
08/10/2018	2.3.1301.21	New Feature	New Pricing Item – Image File Size	The size of completed Imaged documents.
08/10/2018	2.3.1301.21	New Feature	New Pricing Item – Image File Count	The count of completed Imaged documents.
08/10/2018	2.3.1301.21	New Feature	New Pricing Item – OCR File Size	The size of text of completed OCR files.
08/10/2018	2.3.1301.21	New Feature	New Pricing Item – OCR File Count	The count of completed OCR files.
08/10/2018	2.3.1301.21	New Feature	New Pricing Item Category – OCR and Imaging	OCR and Imaging pricing category is available in all MXB reports.
04/28/2018	2.2.1301.113	New Feature	New Pricing Item – Case Rollup - Stage Fence Data File Size	The peak size of the Stage Fence. (available in Relativity@One only)
04/28/2018	2.2.1301.113	New Feature	New Pricing Item – Case Rollup - Publish Data File Size	The peak size of the Published files.
04/28/2018	2.2.1301.113	New Feature	Billing Profile Name restrictions	The following symbols are not allowed in a billing profile name any more: "+", "!", " ", "/", "\", "[", "]", "\", "&", "<", ">", "{", "}", "%", "^", "~", "@".
04/16/2018	2.2.1301.109	New Feature	New Pricing Item - Case Rollup - Full Text Data File Size	The size of the Full Text catalog.
03/15/2018	2.2.1301.96	Resolved defect	Publish Data Usage Dashboard Peak	Change in calculating the peak for Publish Data Usage to be displayed in the dashboard.
03/15/2018	2.2.1301.96	New Feature	New field in Users category pricing items - Priority Order	When a user is part of more than one user charge, they will be charged based on the one with the highest priority.
03/15/2018	2.2.1301.96	New Feature	New field in Users category pricing items – Groups Filter Behavior	When groups are selected in users charge, the users in this groups will be included/excluded based on the selected Groups Filter Behavior.
03/15/2018	2.2.1301.96	New Feature	New pricing type - Exclude Workspaces	Exclude Workspaces allows you to select multiple Workspaces that will not be included in the generated reports and neither of the other pricings will be applied to them.
03/15/2018	2.2.1301.96	New Feature	New Excel version of billing reports - ExportData	ExportData file is a specific Excel version of MaxBilling reports which is suitable for importing in other systems.
03/15/2018	2.2.1301.96	New Feature	New fields in Pricing Item details	New fields in Pricing Item details are available for specifying – E-Code and Cost Code.



Date	Version	Type	Features	Description
01/25/2018	2.2.1301.85	New Feature	Case Rollup items - Charge Level – Instance Peak	Instance Peak choice for the Single-Choice field for Case Rollup pricing item – Charge Level. <ul style="list-style-type: none"> <li>Instance Peak – specifies that when a report is generated, the usage for the item will be considered from the date when was the max value for the item for all Workspaces in the whole Relativity® instance combined (for the billing period)</li> </ul>
01/25/2018	2.2.1301.85	New Feature	Case Rollup items - Charge Level – Client Peak	Client Peak choice for the Single-Choice field for Case Rollup pricing item – Charge Level. <ul style="list-style-type: none"> <li>Client Peak - specifies that when a report is generated, the usage for the item will be considered from the date when was the max value for the item for all Workspaces for the Client combined (for the billing period)</li> </ul>
01/25/2018	2.2.1301.85	New Feature	Case Rollup items - Charge Level – Matter Peak	Matter Peak choice for the Single-Choice field for Case Rollup pricing item – Charge Level. <ul style="list-style-type: none"> <li>Matter Peak - specifies that when a report is generated, the usage for the item will be considered from the date when was the max value for the item for all Workspaces in the Matter combined (for the billing period)</li> </ul>
01/25/2018	2.2.1301.85	New Feature	Case Rollup items - Charge Level – Workspace Peak	Workspace Peak choice for the Single-Choice field for Case Rollup pricing item – Charge Level. <ul style="list-style-type: none"> <li>Workspace Peak – specifies that when a report is generated, the usage for the item will be considered from the date with the max value for the item for the Workspace (for the billing period)</li> </ul>
01/25/2018	2.2.1301.85	New Feature	New Report type - Instance	MaxBilling users are able to generate Instance reports. Instance breakdown can be included only for Instance reports.
01/25/2018	2.2.1301.85	New Feature	New Profile type - Instance	Now MaxBilling users are able to create Instance reports. This will allow them generate reports with accumulated billing information for the whole instance.
01/25/2018	2.2.1301.85	New Feature	New Breakdown - Instance	Along with Workspace, Matter and Client breakdowns, MaxBilling users will be able to generate reports with Instance breakdown of the reported items.
01/25/2018	2.2.1301.85	New Feature	Detailed Excel Report	Along with PDF and summarized Excel, now the generated reports are available in Detailed Excel. There all reported items are listed with the usage, calculation and their additional information.

Date	Version	Type	Features	Description
11/24/2017	2.2.1301.70	Enhancement	Data Tier	Added fields to Data Tier RDO to contain information about the user/service that last updated it, when it was updated and current status message.
11/24/2017	2.2.1301.70	Enhancement	Report Files	All generated report files are combined in one ZIP
11/03/2017	2.2.1301.57	New Feature	Report Generation	Providing the user with the ability to select which breakdowns they want to be included in the generated report.
11/03/2017	2.2.1301.57	Enhancement	Report PDF	The report represented in PDF shows breakdown by Client.
11/03/2017	2.2.1301.57	Resolved defect	Stage Fence Dashboard	The charge free limit of Stage Fence Data equals the Subscribed Data tier * 5 as it is required.
10/16/2017	2.2.1301.49	Enhancement	Published Data Dashboard	The peak value in Published Data Dashboard now considers only billable file sizes and is based on environment peaks, not Workspace peaks)
10/16/2017	2.2.1301.49	Enhancement	Pricing Items are RDOs	The pricing items are no longer Choices, but RDOs that are selected as Single Object. As such they have additional information for the user: Friendly Name, Billing Code, Description
10/16/2017	2.2.1301.49	New Feature	Metadata for Pricing Items	When selected, pricing item metadata is visible in the layout as well
10/16/2017	2.2.1301.49	Enhancement	New filters and charge levels for Users	We have added two levels of filtering (Relativity® User Type and Groups) when adding Users Pricing Item and three charge levels (Per Workspace, Per Matter and Per Client)
10/16/2017	2.2.1301.49	Enhancement	New charge level for Tasks	Charge level is added also to Tasks Pricing Item
10/16/2017	2.2.1301.49	New Feature	Logo for report	When generating the report, user will be able to select a logo that will be added in the generated PDF report
10/16/2017	2.2.1301.49	New Feature	New report breakdowns	Now the report is generated with breakdown on: Workspace, Matter and Client
10/16/2017	2.2.1301.49	Enhancement	New Processing reports	Now there are three levels of Processing reports – Summarized, Detailed (based on Processing set), Detailed (based on Processing Data Source)
10/16/2017	2.2.1301.49	New Feature	New tab in Settings – Pricing Item Type	Now MaxBilling users will be able to specify and edit Pricing Item metadata
07/30/2017	2.0.1301.215	Resolved defect	Fixed Stage Fence Current and Peak values in Dashboard	Fixed issue in gathering Stage Fence Current and Peak values
07/07/2017	2.0.1301.211	Enhancement	Access Denied for download buttons	Users that are not members of the administrative billing Workspace, where MaxBilling is installed, cannot download MaxBilling reports using the download URL

<b>Date</b>	<b>Version</b>	<b>Type</b>	<b>Features</b>	<b>Description</b>
06/27/2017	2.0.1301.209	Enhancement	Removed trigger on AuditRecord_PrimaryPartition	Beginning in 2.0.1301.209, MaxBilling application no longer has a trigger on AuditRecord_PrimaryPartition that deletes MaxBilling audits for SELECT queries
04/04/2017	2.0.1301.188	New Feature	Staging Data and Production Data Dashboard	Beginning in 2.0.1301.188, MaxBilling contains new tab Usage Information that shows Staged and produced data in charts.
03/08/2017	2.0.1301.178	New Feature	Two report types	Beginning in version 2.0.1301.178, MaxBilling users will be able to generate two different report types – Single report for multiple clients and Multiple reports for a single client
03/08/2017	2.0.1301.178	New Feature	New columns in the generated reports	There are three new columns added to the Workspace Breakdown in the generated reports: Client Name, Matter Name, Workspace ID
02/21/2017	2.0.1301.164	New Feature	MaxBilling Scheduler	Beginning in version 2.0.1301.164, MaxBilling Scheduler is part of MaxBilling application.
02/21/2017	2.0.1301.164	Enhancement	MaxBilling Agents	MaxBilling agents are optimized to be more resistant to environment issues
02/09/2017	2.0.1301.156	New Feature	Billing profile types	Beginning in version 2.0.1301.156, MaxBilling users can set one profile for multiple/all clients.
02/09/2017	2.0.1301.156	Enhancement	Consistency Check	Profile Consistency Checker agent is adapted for the new profile types.