Sprint 82

2026-03-12 - - Comments (0) - Releases

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This sprint strengthened accounting, compliance, and workflow capabilities and including improvement for support and billing operations.

1. Office Payment & Anticipated Disbs Enhancement

- **Summary:** Overhauled office payments and anticipated disbursements so firms can manage complex cost flows and VAT/GST more accurately with less manual effort.
- **Assignee:** Rafael

2. Matter Client Authority to Transfer Funds

- **Summary:** Added trust transfer authority tracking so Australian firms can clearly see when client approval has been received before moving funds from trust to office.
- **Assignee:** Igor

3. InfoTrack Integration

- **Summary:** Delivered the first phase of InfoTrack integration so teams can order and receive searches and identity checks directly from within Yao.
- **Assignee:** Igor

4. Reverse Credit Notes

- **Summary:** Enabled reversing credit notes so finance teams can correct mistakes and keep client billing accurate without workarounds.
- **Assignee:** Henrique

5. Add Skip Xero flag to AD allocate & save flag in ledger

- **Summary:** Introduced a Skip Xero flag so users can control when AD allocations sync to Xero and avoid sending entries before they are ready.
- **Assignee:** Rafael

6. Workflow Tasks re-check who the [responsible person] is at the time off adding a next section and assign task the current [responsible person]

- **Summary:** Updated workflow task assignment so new tasks follow the current responsible person on the matter, even when ownership changes mid-case.
- **Assignee:** Igor

7. Connect Support System

- **Summary:** Connected the new support portal so users can raise and track support requests through a dedicated help channel linked to Yao.
- **Assignee:** Murilo