

CodySoft April 27th 2020 release notes:

Collateral Management Module:

1. Addition of Document Developer role
 - a. Document developers are selected from the drop-down list on a project by project basis.

Project Manager * Al Valenti ▼

Cory Belden

Secondary Project Managers Cory Belden ▼

Andrew Casey

Document Developers Andrew Casey ▼

- b. Document developers are the users who edit documents in the Template editor, get approvals, do template testing, create reviews and make edits, download versions from the Versions tab, and can view, create and edit assets within the library.
2. Notifications updates
 - a. Improved subject lines, additional fields providing more details, updated links, and formatting updates

Plan Benefit Package Module:

1. Complete Import without completing the Review Fields

Complete All Imports?

There are 1 unreviewed items. Are you sure you wish to complete this import?

Cancel Complete All

- a. Click **Complete All**, to continue and complete the import.
 - b. Click **Cancel** to continue with the Review Fields process.
2. Ability to update numbering sequence for Conditional Transformations
 - a. Click the up or down arrow to move the transformation in order of hierarchy. Conditions higher in the list are triggered in order before ones lower in the list.

3. When editing a rule, you can change the header which is associated with the field


Please enter a new Header Name

Header Name

SECTION A: SECTION A-5

Cancel Save

- a. You can enter the first few letters of the section name to search for it instead of scrolling through the entire list.
4. Check for unique field names when creating a new field or cloning a field
 - a. If you try to save a new field that already exists, an error message displays

 **Error occurred**

Failed to submit data. Error details: The name SBTEST3620 is already used by 1 active field(s).

Close