

FINASTRA

CreditQuest

Release Notes

Version 23.3

November 2023

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Introduction

These release notes describe the new features and functionality that are introduced as part of Finastra's CreditQuest 23.3 release. These notes cover both administration and the end-user side.

This release adds enhanced security features as well as timely credit bureau release changes.

Microsoft Windows Server 2012 and CreditQuest 23.3

Effective with the CreditQuest 23.3 release, the following Microsoft products, which have been or will be decommissioned by Microsoft, are no longer supported for use with CreditQuest 23.3:

- Windows Server 2012
- Windows Server 2012 R2
- SQL 2012 R2
- Microsoft Office 2013

IMPORTANT! Prior to applying this release, please verify that all devices have been upgraded to a supported operating system and the CreditQuest Servers have been upgraded.

Our recommendation is to upgrade to Windows Server 2016, which also upgrades the .NET Framework to 4.6. Please refer to Microsoft documentation for each product for further information and extensions.

These changes are necessary because Microsoft officially retired support for Windows Server 2012 on July 12, 2022, and will retire 2012 R2 on October 10, 2023.

Note: Any questions should be addressed to your IT/Security team.

Product Enhancement Items

Common

Tracking Number	Issue	Description
CQ-19988	Create Stored Procedure FA_CUSTOM_API_LOADUPDATE	Added the FA Custom API Upload stored procedure that does not update from versioning application. This is used as storage of a client custom FlashSpread to Financial Analyzer connection.
CQ-19861 RFC#00508293	Modified the stored procedure CM_CloudConnectEntitySync to prevent multiple runs	Applied restrictions to this stored procedure to allow it to be run only once.

CreditQuest Credit Manager

Tracking Number	Issue	Description
CQ-19868 RFC#00510786	New 1071 tab laying ground work for future connectivity of CreditQuest to Finastra's Small Business Data Collection solution.	Added a 1071 tab as part of development groundwork for future connectivity between CreditQuest and a dedicated Finastra Small Business Lending solution which has yet to be released. Note: The 1071 tab is not currently active and does not connect to any solution. Additional information about a Finastra small business lending solution, and any CreditQuest connection to it, will be communicated at a later date.
CQ-19670 RFC#00517281	Equifax Credit Bureau Joint Document Management	The joint account function has been restored to allow for running a single or joint report.
CQ-19878 RFC#00513232	Aspose Upgrade - third party tool to current version	The third-party tool Aspose has been upgraded, allowing for the return of the Credit Memo Print to PDF function.
CQ-19985 RFC#00540926	Commitment amount field expansion	The Commitment amount field has been expanded to accept more than 10 characters, or amounts up to 9,999,999,999.
CQ-20037 RFC#00559624	Stored Procedure added to Remove Historic Credit Memos	The CreditQuest database can grow very large, often due to versioned credit memos with high resolution photos. This new Stored Procedure allows the Administrator to manage the size of the database. Note: Contact Finastra support for more information on using this feature.
CQ-19669 RFC#00504668	Display each Entity Name on Joint Equifax Credit Bureau Accounts on Summary Tab	Joint account function has been restored to show each of the Entity Names belonging to a Joint Account on the Summary Tab.

CreditQuest Financial Analyzer

Tracking Number	Issue	Description
CQ-20040 RFC#00559901	Adding Additional Line Items in Financial Analyzer	A new stored procedure, in conjunction with the preference setting 1138, allows an Administrator to increase the total number of line items available per sheet.
CQ-19743 RFC#00487308	FlashSpread import to Financial Analyzer improved	Importing data from FlashSpread to Financial Analyzer now sets the appropriate line items in sheets in Financial Analyzer.

CreditQuest Portfolio Manager

Tracking Number	Issue	Description
CQ-20041 RFC#00559849	Portfolio Manager Range Dimension NAICS Sectors - update to 2022	The Portfolio Manager Range Dimension now includes these additional AICS Sectors - updated for 2022: 32, 33 - Manufacturing 45 Retail Trade 49 Transportation Warehouse
CQ-19601	Fail Safe Pop Up Window added to PM-Range Dimension - Navigation	When a user attempts to leave the PM-Range Dimension page without saving any changes, a pop up window warning now appears.

CreditQuest Security Manager

Tracking Number	Issue	Description
CQ-19242 RFC#00320084	Disabled accounts hidden in Security Manager	Disabled user accounts can now be filtered from display in Security Manager.
CQ-20021 RFC#00554377 RFC#00531064	Administrators can select multiple users in Security Manager to add or remove	Administrators can now select multiple users to move to Members or Non-Members groups.

Tracking Number	Issue	Description
CQ-19619 RFC#00495826	Privilege escalation when Security Manager rights are changed	A security feature is added that expires a user session when any changes are made in Security Manager instantaneously once saved

CreditQuest Table Manager

Tracking Number	Issue	Description
CQ-19249 RFC#00369216	Workflow Steps - Duplicate Step Functionality	Administrators can now select a step and duplicate it.
CQ-19996 RFC#0054618	Added New Sectors for 2022 NAICS Codes	New Sectors were added in the 2022 NAICS Codes allowing for the correct display of the industry classification.
CQ-19984 RFC#00541604	Expansion of the Checklist Questions ID Column	The ID Column in the Checklist Questions is increased from a 2 to a 5 digit display.

Product Maintenance Items

The following product maintenance items are resolved in this release.

CreditQuest Credit Manager

Tracking Number	Issue	Description
CQ-19998 RFC#00547473	System does not perform auto save as user moves through Credit Item tabs	Users can now make changes and move through Credit Item tabs and the system will automatically save their changes.
CQ-19890 RFC#00517274	Errors when pulling Equifax Credit Bureau PDF reports from frozen accounts	Users can now pull Equifax Credit Bureau PDF reports from frozen accounts.
CQ-19989 RFC#00542785	Population Tab does not operate correctly when selecting Merge Letters	The Merge Letter Population function now works correctly, allowing a user to select the letters to be displayed and merged.
CQ-19894 RFC#00517242	Workflow Queues display count incorrectly	The number of global items has been increased from 5400 to 32,000 in order to correctly display the number of Workflow Queues.
CQ-19891 RFC#00517281	Joint accounts for all API Credit Bureau pulls not correctly using Joint account function	When using or not using the Joint function for all Credit Bureaus the system no longer has difficulties providing the correct response.

CreditQuest Portfolio Manager

Tracking Number	Issue	Description
CQ-20100 RFC#00567650	Reports columns cannot be narrowed	Users could not resize columns in Reports. This error has been resolved.
CQ-20052 RFC#00561654	Refresh button error	The Refresh button failed to re-enable after changes in a report have been made. This error has been resolved.
CQ-200094 RFC#00567653	The PM/Analysis/Graph Properties/Design Tab "Titles" is misspelled	This error has been resolved.

CreditQuest Table Manager

Tracking Number	Issue	Description
CQ-19907 RFC#00521300	Credit Item Worksheet renaming affects Impairment Worksheet	After renaming a Credit Item worksheet, the Resource Management ID became associated with a different Resource ID. This error has been resolved.

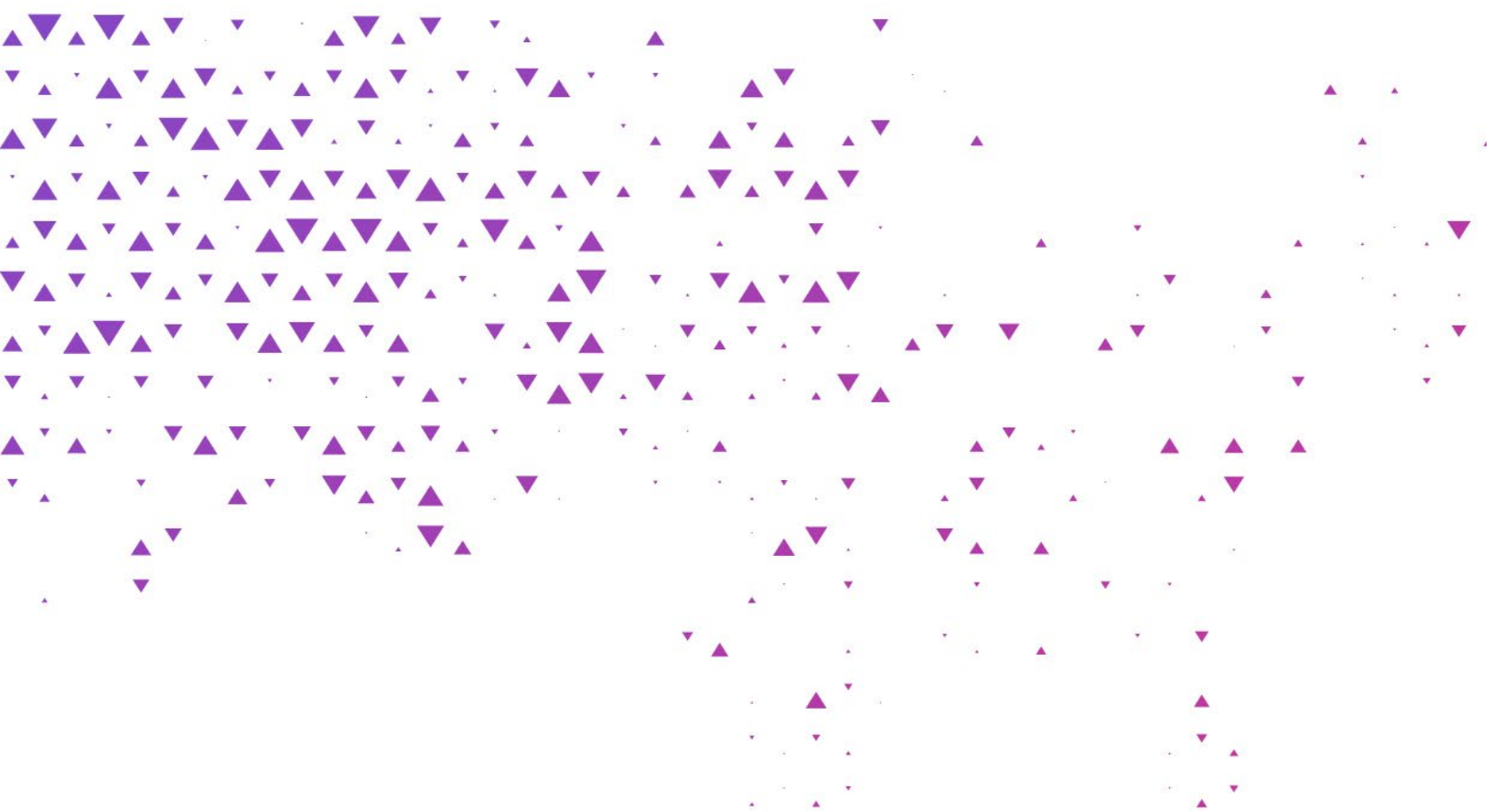
Finastra Support

Finastra support offers several options to help you get the most out of your software, including a self-service Case Management tool, and phone support.

Please visit the Finastra Customer Success Community at <https://support.finastra.com> to log in to our online self-service Case Management system. If you forgot your password, simply click the [Forgot Password](#) link. Once logged in, you have the ability to use the Finastra Customer Success Community to troubleshoot issues and find answers to questions.

If your financial institution is not currently using these tools and would like to, please contact Finastra support for assistance.

Note: The Financial Modernization Act of 1999, also known as the Gramm-Leach-Bliley Act or GLB Act, includes provisions to protect consumers' personal financial information held by financial institutions. Therefore, Finastra support cannot accept data or screen captures that contain personal financial information via email or fax. For information about secure file transfer methods, contact Finastra support.



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