

CORES HAN 1.11 Release Notes

These notes describe highlights of the CORES HAN 1.11 release scheduled for Thursday, June 16, 2022. More information is available through the help in your solution or by contacting Juvare Support at 877-771-0911 or support@juvare.com.

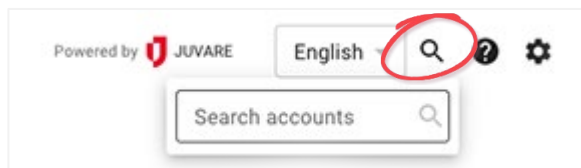
Document Permissions

Now, in the Documents section, folders and files are by default accessible to the person who creates them and Client Administrators. The only exception to this occurs when you create a folder or file within a folder, in which case, the new item inherits the permissions of the parent folder. You can extend folder and file permissions to other people in your solution by assigning permissions to accounts and organizations.

For example, you can grant Read Only rights to all accounts in your solution or you can give Read, Write, and Modify (change permissions) rights to one or more individual accounts or organizations. Additionally, you can now revoke all permissions on a folder or file in one click.

Account Search

The account search, which appears as a field on the upper right after clicking the search icon, was improved by automatically positioning the cursor in the search field when it opens and allowing a click of the Enter key to initiate the search.



Account Imports

Now, it is possible to configure account imports to include or exclude certain fields, as well as specify the field validation by data type, length, and whether it is required. Simple and composite fields, such as an address that includes the street, city, state, and ZIP details, can be included and the account import template automatically updates to reflect your field configurations. As a result, when constructing an account import file, you can easily include multiple contact emails and phone numbers for each communication channel.