

Core Solution Release 1.15.0

Release Summary Report

Release Version: 1.15.0

Previous Version: 1.14.0

Release Date: January 16, 2026

Executive Summary

Release **1.15.0** delivers a broad set of improvements across the platform, focusing on **usability, reporting, customization, performance, and stability**.

This release introduces new UI capabilities, expanded reporting and export options, improved translations and localization, enhanced AI features, and multiple backend optimizations.

In addition, a large number of fixes improve reliability across core business flows.

What's New

Client Management

- Client action history on client card A complete, chronological history of all client-related actions is now available directly on the client card, improving transparency and context for managers.
- Extended client entity model New fields were added to the client entity to support richer data modeling, better segmentation, and future analytics capabilities.
- Next / Previous client navigation Seamless navigation between client cards without returning to the client list, significantly accelerating day-to-day CRM workflows. *
- Future action date column Displays the nearest planned action for each client, helping managers prioritize follow-ups and workload.
- Last action date column Shows the most recent completed action per client, enabling quick assessment of engagement activity.
- Removed description field limits Client description fields now support extended text for detailed notes, call summaries, and internal documentation.

Actions & Requests

- Open Actions in a new tab Actions can be opened in a separate browser tab, enabling parallel work with multiple clients or tasks.
- Actions UX enhancements Improved usability, clarity, and interaction patterns across the Actions section for smoother daily operations.

- Comments after Action: Multiple actions creation in a single flow, reducing repetitive manual actions.

☐ Filters & Configuration

- Transaction filters by desk and manager Added advanced filtering options in Transactions to improve segmentation, control, and reporting accuracy.
- Improved “Action Date / Session Date” filtering Refined date filtering logic to eliminate incorrect results and edge-case inconsistencies.
- Configurable column order CRM configurations now allow dynamic reordering of table columns, giving teams more control over data presentation.

☐ UX / UI Improvements

- Universal modal closing behavior All CRM modals can now be closed regardless of nesting depth or opening context, improving UX consistency and predictability.
 - Bucket name visibility fix Bucket titles are now always visible inside buckets, resolving previous usability issues.
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Key Highlights

☐ New Features & Capabilities

User Interface & Usability

- Drag & drop support for managing verification statuses
- New table columns and filters (e.g. *Is Active*, *Is Completed*)
- Improved navigation and interaction flows in Actions and Reports
- Popovers and drawers added for better contextual information
- Calendar events now open detailed views on click

Reporting & Data Management

- Export functionality added to reports
- Invoices module implemented, including invoice list and details
- Description field added to invoices (UI & backend)
- Improved data formatting (currency display, dates, accordions behavior)
- Duplicate handling enhanced with date-based filtering

Customization & Branding

- Project-level customization support (logos & favicon)
- Improved configuration for symbols and labels

AI & Automation

- AI Voice Agent improvements for better accuracy and stability
 - Embeddings synchronization mode introduced (Manager / Client architecture)
 - Chat Helper storage migrated from file system to MongoDB for scalability
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☐ Bug Fixes & Stability Improvements

Core Platform Fixes

- Resolved notification delivery issues
- Fixed permission checks for downloading reports
- Corrected transaction handling and error processing logic
- Improved handling of empty or edge-case data in charts and reports

UI & Data Consistency

- Fixed incorrect labels, ordering, and formatting issues
 - Corrected filtering, sorting, and resolution column behavior
 - Addressed multiple layout and design inconsistencies
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