

SUMMARY

Product Name	LenderKisok
Release #	
Release Date	July 16 th 2021

FEATURE LIST

Reference #	Feature Name	Feature Description
387	Clone Related	Clones opportunity with relationships and funding source records. Maintains original owner of the opportunity.
389	Net Value	New field on the funding source object the auto calculates the difference between the referral fee and commission
393	Fed Tax Id Added to Deal Entry Wizard	The field Fed Tax Id on the account is now available on the customer in the deal entry wizard
395	Documentation Fee Defaulting	New field 'Documentation Fee' on the customer account, which when filled in will default a fee record of type 'Documentation' on all newly created opportunities for that customer.