



ASAPP OXP® Version 21 Roadmap Enhancement

Version 21, the first major Roadmap Enhancement Release of 2025.

TORONTO , ONTARIO, CANADA, March 25, 2025 /EINPresswire.com/ -- The ASAPP Financial Technology product team is excited to deliver Version 21, the first major Roadmap Enhancement Release of 2025.

This Roadmap Enhancement Release, launched on March 24th, includes several exciting new features and platform enhancements to the Origination and Engagement feature sets to improve both member and staff experiences.

[History of previous and current Version Updates](#)

Origination

Within the [Origination feature sets](#), ASAPP Financial Technology introduced several new items including: Configuration of condition and policy exceptions for retail and business applications, the ability to use separate Equifax credentials for lending and non-lending products, and other additional general platform improvements identified by our Client-Partner community.

During the origination flow staff can add conditions and / or policy exceptions to both retail and business lending and non-lending products. These conditions and restrictions are easily adjusted on applications, enabling staff to track them and ensure their review and decisioning aligns with the institution's preferences and requirements. Conditions and policy exceptions can also be quickly added to documents via the existing DocuSign labeling process, guaranteeing a transparent member application experience.

With Version 21, credit unions can provide a separate set of Equifax credentials to deploy soft-hit credit report pulls. Soft hit credentials are available for both Retail and Business account types including Deposit, Term Deposit and Chequing (without overdraft) products. Hard hits are always performed for lending products such as Loan, LOC, Mortgage and Overdraft protection.

Additional Origination enhancements in this release include:

Ability to update fees on a business application and have access to those fees through DocuSign

Labels.

- Ability to force a rule in the system that requires a checklist to be completed before an application can move to verified or completed status.
- Equifax Kount results display formatted response.

Engagement

Within the Engagement feature sets we have introduced: the second phase of automating the creation of conversations, opportunities or concerns from [ASAPP OXP Opportunity Engine™](#) results, CRM change log, pipeline integration between Origination and Engagement, enhanced file upload and search capabilities on the Member documents page, and other additional general platform improvements.

The second phase rollout offers ASAPP OXP® Client-Partners the capability to save Opportunity Engine templates configured for Engagement and schedule them for a daily, weekly, or a custom frequency of your choosing. This can be deployed and scheduled up to two years out from your current date and time. In addition, users can skip or reschedule future dated executions, edit the schedule's frequency, extend the scheduling, or discard it entirely. On the scheduled dates, the system automatically runs the query against ASAPP's Data Warehouse and generates an Opportunity, Conversation or Concern for the members returned, based on what is configured at the time of execution.

This enhancement marks the final phase of a multi-release initiative to eliminate the existing manual process of running queries and defining the field requirements of each CRM object that needs to be created to expose the data insights across the Team Portal.

Client-Partners now have access to a Change Log that summarizes changes made to conversations, opportunities, concerns, tasks, sales, and interactions over time. The Change Log is broken into key events such as Create and Edit, as well all events relay the date/time of change, the user who saved it, and the previous versus new value of the field.

Within this release, opportunities generated are now available for viewing by staff at the application level within the Origination feature set. Additionally, products can be configuration to support the generation of an Opportunity template pairing the field values associated with the Opportunity, though these fields are adjustable prior to creation. Users also have the option to search for existing Opportunities and associate them to the application instead of creating a new one. This feature reduces the work required by staff to ensure in-flight applications are tracked in Engagement.

To improve the ability for our Client-Partners to locate files that pertain to a particular application, the Member Documents page has been enhanced to display the Product Type and the Product and Application ID per file. Filter fields have been added to the page to further

expedite a user's search for specific files. A new file upload action has been added to the Member Documents page that allows users to upload new files and associate them with existing, synced Application IDs for that member.

Additional enhancements to the Engagement feature sets included in this release, are:

- Enhanced Sales integration between Origination and Engagement
- HTML File Support per Email Template
- Additional Email Template merge field
- Dynamic redirect when saving or cancelling and edit or viewing a request
- Display of the Date Assigned field in filter and results grid of key Member Management pages

ASAPP's Platform Support and Operations and Platform Development and Implementation Teams will be helping the Client-Partner community rolls out these changes over the coming weeks so that Client-Partners can leverage the Version 21 Platform Enhancements for greater ROI.

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About ASAPP Financial Technology

ASAPP Financial Technology provides Customer Experience Software that supports regulated financial institutions as they Originate, Onboard, Understand, and Grow their Customer Relationships. In Canada, the ASAPP OXP® | Omnichannel Experience Platform has helped over 50 Canadian credit unions create sustainable competitive advantages to compete against direct-to-consumer fintech solutions. In the United States, the bank.io OXP® | Omnichannel Experience Platform delivers Origination and Engagement feature sets that leverage our experience gained supporting Canadian financial institutions, while delivering a solution that adapts to the challenges and opportunities for the US credit union and community bank markets.

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