OPT*ins* 5.8 Release Notes

OPT*ins* 5.8 was released to production on Thursday, January 21, 2021. The release contains a new feature for industry users to be able to add and manage their bank account information within OPT*ins*.

Enhancements in OPT*ins* 5.8

EFT Account Management (Industry users only)

- A new tab has been added for EFT Account Management. Industry users with the Bank Account Manager role will be able to access this page.
- Users will be able to see a list of the EFT Accounts added to the current OPT*ins* account. All EFT Accounts previously configured by the OPT*ins* Marketing Team will display in this list.
- Bank Account Managers can add a new EFT Account.
    - Bank Account Manager will need to specify bank account information and contact information for the EFT Account.
    - Once banking information is saved for the EFT Account, it cannot be edited.
    - Users will be able to edit the contact information for an EFT Account.
- Bank Account Managers will be able to associate and disassociate entities to an EFT Account.
    - Each entity can only be associated to one EFT Account at a time.
- Bank Account Managers will be able to deactivate and reactivate EFT Accounts.
    - Deactivating an EFT Account will disassociate all entities from that EFT Account.