Release 2.6.5

Release Date: December 15, 2025.

One of the major implementations in 2.6.5 is the first iteration of AI Chat with Cases via AI Button. With this implementation, the system will take the initial prompt to pass in the case metadata and notes to allow the user to chat with the case.

Another noted enhancement is the dynamic integration with Pandadoc. The system now includes configurations of tagging to allow the organization to customize the envelope composition and sending instead of using hardcoded values.

Release 2.6.5 also includes a few noted enhancements and bug fixes as mentioned below:

Cases

- Correct missing attachment from email to cases for case type configured with AI Attachment Profiling.
- Implement new GetCaseTypes Rest API Endpoint to return list of case types along with the case type configurations.
- Implement new GetExdCascadedValueV2 to return cascaded values for custom External Datasource queries.
- Remove External User from the Assign To option in Cases.

Cast

- Correct issue with Cast job hangs or timeouts when no Base field selected and the Case Type has large volume of data in External Datasource fields.

Email Parser Service

- Correct issue with cases not being generated when AI Profiler is configured on the case type and file got stuck from being processed

Entities

- Enhance Entity Merge function to check for duplicate entities on all field types
- Correct issue with Download Document option from Updoc grid
- Correct issue with Status field mapping in External Entities
- Correct issue with switching Dynamic Template on Entity view page on AKS environment