

# finova

Broker Platform

CRM Release Note for Version  
[MKv5 – 7.27]

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## Introduction

These software release notes cover all system modifications for version MKv5 7.27 of the broker platform CRM system.

The release notes list the bug fixes and known issues provided in this release and are aimed at operational users of the system.

These release notes do not aim to go into technical detail about specific changes or to be the basis for system testing plans.

## Testing of the Release

Testing for this release was carried out in accordance with the test plans as created by the eKeeper Quality Assurance Team.



## New features in this release

This section lists features that have been deployed in this release.

| Item Number      | Description   |
|------------------|---|
| <b>SCRM-2820</b> | Allow larger Bulk Uploads   |
| <b>SCRM-2849</b> | Make email address a mandatory field for each CRM user                            |
| <b>SCRM-2878</b> | Allow Bulk Upload to import into 'Role' field                                     |
| <b>SCRM-2663</b> | Link Burrow Onboarding tool to its relevant Source withing the CRM                |
| <b>SCRM-2701</b> | Add ability to exclude applicants without GDPR consent on Bulk SMS page           |
| <b>SCRM-2768</b> | Email Server configuration panel simplified and clearer for the user              |
| <b>SCRM-2821</b> | Make 'Date Acknowledged' a reportable field                                       |
| <b>SCRM-2850</b> | 'Send to Burrow Portal' button available without having to access Fact Find first |
| <b>SCRM-2885</b> | Link Product Tabs to Purpose of Loans and Policy Types                            |



## Bugs fixed in this release

This section lists identified bugs that have been fixed in this release.

| Issue Number     | Description   |
|------------------|---|
| <b>MKV5-6529</b> | Failure to Create and/or Edit Participants  |
| <b>MKV5-6545</b> | Dashboard notification text failing   |
| <b>MKV5-6548</b> | Login and password update failure   |
| <b>MKV5-6563</b> | IP restrictions failing when in use   |
| <b>MKV5-6579</b> | Applicant issues with Automation Rule communications                                  |
| <b>MKV5-5317</b> | Bulk Upload fails with "a lot" of rows  |
| <b>MKV5-6392</b> | Diary speed issues – <i>Site Specific</i>   |
| <b>MKV5-6401</b> | Multiple users cannot export on a single product when using Twenty7tec                |
| <b>MKV5-6500</b> | Burrow Portal Fact Find failing to return to CRM                                      |
| <b>MKV5-6531</b> | Optimus integration only using first applicants data                                  |
| <b>MKV5-6555</b> | SMS send failure - "No messages to send"  |
| <b>MKV5-6575</b> | Email attachments attaching to emails incorrectly                                     |
| <b>MKV5-5099</b> | 'Can generate spreadsheet report' function not working                                |
| <b>MKV5-5262</b> | Permission for email templates failing when used alongside document permission        |
| <b>MKV5-5607</b> | Linking inbound emails fails to display entire product names                          |
| <b>MKV5-5612</b> | 'New Policy Type' button failing  |
| <b>MKV5-5709</b> | Commission reporting criteria failing   |
| <b>MKV5-6438</b> | Due to be paid commissions failing – <i>Site Specific</i>                             |
| <b>MKV5-6445</b> | Mortgage report search criteria ignoring "None Selected" purpose of loan              |
| <b>MKV5-6488</b> | Interval Period of '0' allowance causing repeats of rule in error                     |
| <b>MKV5-6497</b> | Calculator page locking causes decimal point issues in Totals                         |
| <b>MKV5-6499</b> | 01/01/1970 date being used in Diary Entries and Stage Histories in error              |
| <b>MKV5-6522</b> | Notes from lenders pulling into the Initial Enquiry panel instead of allowing editing |