finova

Broker Platform

CRM Release Note for Version [MKv5 – 7.29.2]

finova

Introduction

These software release notes cover all system modifications for version MKv5 7.29.2 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
SCRM-2945	Team view addition within Edit Diary
SCRM-2633	Updated Commissions page
SCRM-2662	Updated Integration buttons
SCRM-2740	Customisable document Acknowledgement wording for the Burrow Portal
SCRM-2818	Burrow Notification wording improvements
SCRM-2841	Postcode filter for Business Intelligence
SCRM-2842	Add advisers to Business Intelligence
SCRM-2844	Additional User Email Signature merge fields
SCRM-2845	Postcode lookup for clients
SCRM-2912	Allow acknowledgement of uploaded documents within Burrow
SCRM-2913	Allow upload of externally generated documents into Document History
SCRM-2917	Provide reasons why Burrow Portal invites fail
SCRM-2918	Ability to invite Applicant 2 to the Burrow Portal if invite fails on Applicant 1
SCRM-2981	'Send' button added when issuing a document to the Burrow Portal

finova

Bugs fixed in this release

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

Issue Number	Description
MKV5-6549	Twenty7Tec issues – *Site Specific*
MKV5-6634	Bulk Upload columns failing
MKV5-6689	Email template attachment removal failing
MKV5-6697	Completions report failing – *Site Specific*
MKV5-6262	Print Fact-Find issues
MKV5-6585	Applicant issue with the Pre-Approval system – *Site Specific*
MKV5-6631	Team Diary Entry assignment issues
MKV5-6635	Delete option showing in error
MKV5-6640	Report speed issues – *Site Specific*
MKV5-6646	Using Case Reference Search View option fails General Automation Rules
MKV5-6658	Bulk Upload New Lender creation issues
MKV5-6671	Bulk Action cases timeout – *Site Specific*