finova

Broker Platform

CRM Release Note for Version [MKv5 – 7.32.1]

Introduction

These software release notes cover all system modifications for version MKv5 7.32.1 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-3063	Updated Criteria Page for Conveyancing system
SCRM-3092	Add ability to save participant search criteria
SCRM-3136	Add ability to record participant contacts
SCRM-3000	Existing lenders not being populated in Xplan
SCRM-3184	Postcode lookup added to Mortgage Security Address
SCRM-2921	Burrow colour status changes
SCRM-3172	Postcode lookup within Fact Find block address fields
SCRM-3177	Add Multi-Invite support to Burrow

Bugs fixed in this release

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

Issue Number	Description
MKV5-6724	Attached Files pop-out window failing to load
MKV5-6496	Cannot Report on the Default Status for Simple Tasks
MKV5-6632	Search view returning numbers in fields – *Site Specific*
MKV5-6657	Inbox widget display issue
MKV5-6699	Creating new customer failure and speed issues – *Site Specific*
MKV5-6716	Burrow question mappings causing fact find to not return when completed
MKV5-6751	Non client related documents failing to show in Burrow Portal
MKV5-6647	General automation rule failure – *Site Specific*
MKV5-6680	Incorrect Stage/Status application when multi product in use
MKV5-6708	Diary entries with no time state "due in" time in incorrectly
MKV5-6718	& in templates shows as &
MKV5-6725	Locked Fact Find pages blank fields – *Site Specific*
MKV5-6731	Formatting on Conveyancing merge fields incorrect