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Broker Platform

CRM Release Note for Version
[MKv5 – 7.36.2]

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Introduction

These software release notes cover all system modifications for version MKv5 7.36.2 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-3433	iCal download entries have assigned Organiser to ensure added to correct calendar
SCRM-3481	TriGold ActiveX Replacement
SCRM-3548	Preferred Name field added within Applicant Details
SCRM-3587	Ability to make Notes visible to finova Client Portal
SCRM-3611	Ability to receive Notes created in the finova Client Portal

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Bugs fixed in this release

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

Issue Number	Description
MKV5-6876	Tab text name displaying incorrectly when switching Product tabs – Site Specific
MKV5-5628	Unable to view attached documents when sending using templated email
MKV5-6837	Unable to invite to finova Client Portal if User Role is not stated as Adviser
MKV5-6844	'Failed to created Burrow case when adding user to case' – Site Specific
MKV5-6855	Simple Task simple 'checkbox' failure when accessing Tracking page
MKV5-6856	Simple Task default setting not being read by Stage Prerequisite
MKV5-6862	Product restriction failing when reporting
MKV5-6868	Email Server Details failing to save
MKV5-6873	Simple Task permissions readability issues
MKV5-6877	Next Status Due failing to save specific to Product Group
MKV5-6878	Close failing when producing documents