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Broker Platform

CRM Release Note for Version
[MKv5 – 7.37.2]

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Introduction

These software release notes cover all system modifications for version MKv5 7.37.2 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-3556	Additional functionality when using Zapier and Product Stage/Status changes occur
SCRM-3616	Clearer error messages for Email Sync failure
SCRM-3617	Additional 'Preferred Name' field for Applicant
SCRM-3622	Revoke access button for Email API
SCRM-3623	Action Type option when Case Note received from finova Client Portal
SCRM-3646	Create Notification in CRM when Case Note received from 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
MKV5-6913	Case accessibility – <i>Site Specific</i>
MKV5-6904	Gmail API failing to import non-product related emails
MKV5-6909	Text recipient showing coding in error
MKV5-6918	Case accessibility – <i>Site Specific</i>
MKV5-6919	Case accessibility – <i>Site Specific</i>
MKV5-6923	Case accessibility – <i>Site Specific</i>
MKV5-5670	Fact Find completion in portal shows nonrelated questions within Review
MKV5-6867	Updating Lender/Provider within Address Books fails to save
MKV5-6870	HTML Email Templates failing to display as per HTML
MKV5-6874	Diary Entries only editable by creator
MKV5-6882	Stage Dates Search View fields fail
MKV5-6890	Commission exports contain unrelated detail
MKV5-6896	Deleting applicant from Address Book fails to remove Applicant from Cases