

finova

Broker Platform

CRM Release Note for Version
[MKv5 – 7.39.1]

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Introduction

These software release notes cover all system modifications for version MKv5 7.39.1 of the finova 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 Quality Assurance Team.



New features in this release

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

Item Number	Description
SCRM-2191	Advisers & Administrators can be recipients for email templates & via 'Send Email' (can be used with automation rules to send automated emails to internal users)
SCRM-3613	Solution Builder to pull back KFD policy summary
SCRM-3624	Add "Term Months" field to product details



Bugs fixed in this release

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

Item Number	Description
MKV5-6838	Twenty7Tec error 404 recurrence
MKV5-6895	Burrow fact find data dictionary issues
MKV5-6931	Search view pulling incorrect results through <i>(site specific)</i>
MKV5-6936	Adepteo integration/other miscellaneous generated case notes not working
MKV5-6980	KFIs not returning from Air
MKV5-6992	Protection reference missing from Business Summary
MKV5-6994	Solution Builder Quotes returned without KFD still display KFD button on Quote Detail view
MKV5-7023	Applicant address details cleared after adding them onto a mortgage product and saving
MKV5-4621	Incoming Commission Detail: Commission fee type does not output (the column is there but the info is missing)
MKV5-5663	De-selecting applicant(s) from LIFE (Life Cover) products won't save
MKV5-5725	Miscellaneous Product Groups errors
MKV5-5862	LTI Calculation failing to include existing loan amount
MKV5-5944	Footer blocking the last result when looking at the details of an Automation Rule
MKV5-6902	"Permissions Denied" when trying to produce a letter against a Participant
MKV5-6912	Diary entries created by completing simple tasks - remove on stage entry/exit
MKV5-6916	Sending stage driven email to multiple participants
MKV5-6927	Diary Entries - Priorities - Colour Coding
MKV5-6929	Cannot blank out 3+ fields at once
MKV5-6932	Notifications from products appear on cases with same PK number
MKV5-6933	Burrow document acknowledgement notification doesn't work when set to Case
MKV5-6937	Deleting stage doesn't remove Case Abandoned association
MKV5-6954	No document type restriction for 'Upload Alternative Template'
MKV5-6958	When you run the AiR integration on a Mortgage product with multiple applicants then all of the applicants will be selected against the quote despite being deselected
MKV5-6979	View Xplan Comparison - "Sorry. You do not have permission to view that file." <i>(site specific)</i>