

# finova

Broker Platform

CRM Release Notes for Version  
[MKv5 – 7.43.0]

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## Introduction

These software release notes cover all system modifications for version MKv5 7.43.0 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.

Issue Number	Description
<b>SCRM-1832</b>	Ability for User Navigation bar to be grouped by User Team
<b>SCRM-2914</b>	Intermediary Manager – Save Business Intelligence Data
<b>SCRM-3344</b>	Addition of error handling when using Office365 API
<b>SCRM-3762</b>	Add 'Term' in Months on Insurance product types
<b>SCRM-4004</b>	Date in Months returned when using Twenty7Tec
<b>SCRM-4015</b>	Addition of Status Dates within Insurance product type Search Views
<b>SCRM-4050</b>	Broker ID – Additional API options
<b>SCRM-4051</b>	Firm to Broker ID link
<b>SCRM-4124</b>	Adding Fee Reference as a Search View option
<b>SCRM-4127</b>	Adding ability to use Merge Fields within Birthday Emails
<b>SCRM-4128</b>	Expand available recipient Merge Fields: <ul style="list-style-type: none"><li>○ Recipient Title</li><li>○ Recipient Preferred Name</li><li>○ Recipient Forename</li><li>○ Recipient Surname</li><li>○ Recipient Company Name</li></ul>
<b>SCRM-4130</b>	Intermediary Manager – Ability to assign products/records by postcode

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## Bugs fixed in this release

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

Issue Number	Description
MKV5-7188	"Address (Single Field)" linked field causing applicant address to blank following "Intend to Move" trigger
MKV5-7109	Unable to use some integrations from Case Summary or Case Quotes tabs
MKV5-7145	Intermediary Manager Upload Issues
MKV5-7161	Twenty7Tec Integration Config Screen - Resubscribe fails
MKV5-7162	Saving a product causes a fatal error
MKV5-7165	Dashboard not loading – <i>Site Specific</i>
MKV5-7175	Unable to see Fact Find answers from customer and PDF file is not created – <i>Site Specific</i>
MKV5-7185	Users are not getting emails in their inbox – <i>Site Specific</i>
MKV5-7189	Unable to update/blank more than 3 Applicant fields
MKV5-7193	Fatal error when ticking on commercial applicants for protection products
MKV5-7214	Automated Stage Action failing
MKV5-6685	Stage not initially saved when creating a stage driven Email/SMS template
MKV5-6777	No 'Acknowledgement' column header when generating an acknowledgement doc
MKV5-6816	Repayment type and Purpose of Loan are not carried across to TriGold
MKV5-6903	'Insurance Quotes' panel duplication causes fatal error
MKV5-7033	Automated emails not sending if recipient is a Participant
MKV5-7067	Diary Entry creation using Case Note causes Dashboard failure
MKV5-7082	Next Status due date not populating on first Product Status
MKV5-7091	Mortgage Amount not showing when using TriGold – <i>Site Specific</i>
MKV5-7108	'Remove On Stage/Status Exit' not working
MKV5-7110	Unable to select/un-select/edit applicants within Intermediary Manager Email search
MKV5-7123	'Resident since date' and 'Country' field not showing in customer custom fields list
MKV5-7133	Numeric custom fields with entered data of "0" aren't displaying the data in Search View
MKV5-7142	More Details View Profile displaying in error
MKV5-7143	'&' displaying in error when reporting
MKV5-7146	Customer Search View data not exporting
MKV5-7148	Inbound emails failing
MKV5-7156	Participant Saved Searches failure
MKV5-7163	Credit and Initial Enquiry panels used within Product Page Layout causes fatal error
MKV5-7173	History case panel showing incorrect dates
MKV5-7183	Initial Enquiry panel dates incorrect format
MKV5-7184	DOB date format incorrect within Applicant details