

# finova

Broker Platform

CRM Release Notes for Version  
[MKv5 – v7.44.0]

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## Introduction

These software release notes cover all system modifications for version MKv5 v7.44.0 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.

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## Highlights

- Sort Data Table on Outgoing Commissions Page

The screenshot shows a data table with columns: Amount Due To, Potential Business, Signed Up Business, Completed/On Risk Awaiting Payment, Due To Be Paid, and Paid. Above the table are sorting buttons: 'Sort A-Z / Z-A' and 'Sort Highest-Lowest / Lowest-Highest'. Red boxes highlight the sort icons on the table headers and the sorting buttons.

Amount Due To	Potential Business	Signed Up Business	Completed/On Risk Awaiting Payment	Due To Be Paid	Paid
Percentage Test Edited	8033.25	0.00	0.00	0.00	0.00
The Company	2087.50	0.00	0.00	1461.26	0.00
Network Fee Participant	462.50	0.00	20.00	35887.50	0.00

- New Field: Protection: Add 'Next Stage Due Time' Field
  - When specifying the 'Next Stage Due Date' you can also specify the time for required actions.
- New Diary Statistics Search View Item:
  - See diary statistics in the reports section

The screenshot shows a configuration interface for 'Diary Statistics'. It includes a section for 'Available Fields' and 'Currently Selected Fields'. The 'Available Fields' list includes: Number of Appointment diary entries, Number of Sales Event diary entries, and Number of Sales Visit diary entries. The 'Currently Selected Fields' list includes: Applicant 1 - Forename, Company 1 - Business Name, and Company 1 - Legal Status. To the right, a vertical list of 14 diary entry types is shown, each in a box: Number of Accounts diary entries, Number of Appointment diary entries, Number of Chase Legals diary entries, Number of Contact Introducer diary entries, Number of Dave Jones Test diary entries, Number of General Follow-Up diary entries, Number of Lead Follow-Up diary entries, Number of Lender Chase diary entries, Number of New Lead diary entries, Number of Opportunity diary entries, Number of Other diary entries, Number of Personal diary entries, Number of Re-Mortgage diary entries, and Number of This is a test by Mr Fox diary entries.



## New features in this release

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

Item Number	Description
SCRM-4137	Twenty7Tec: Send the term months value when doing a requote
SCRM-4138	Outlook Integration: Attachments Restriction. Send Attachments 3MB+
SCRM-4233	Protection: Add 'Next Stage Due Time' Field
SCRM-4404	Allow diary stats to be added to search views and seen in search results
SCRM-4515	Adding Sorting to the data table on the Outgoing Commissions page

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## Bugs fixed in this release

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

Issue Number	Description
MKV5-7273	Fatal error when trying to go access any case – site specific
MKV5-7315	Fatal error when trying to access Fact Find – site specific
MKV5-7327	Fatal error when trying to open access product – site specific
MKV5-7328	Fatal error when trying to open access product – site specific
MKV5-7382	Fatal error when reporting – site specific
MKV5-7171	500 error on bulk upload – site specific
MKV5-7227	Fatal Error (v5x) When Reporting – site specific
MKV5-7228	Fatal Error on Main Page – site specific
MKV5-7231	Fatal error in reporting occurring if product group has custom field of 'Textfield Date'
MKV5-7233	Status change action on automation rule not working correct
MKV5-7237	Fatal error in fact find print functionality
MKV5-7242	Business Summary not retaining protection product filter selections after navigating to a product
MKV5-7244	Address Book – Edit Participant option navigation buttons failing
MKV5-7249	Fatal Errors when trying to delete a receipt under commissions details section.
MKV5-7250	Fatal error when trying to open Insurance Product type
MKV5-7252	Fatal error when trying to add or edit participant types
MKV5-7261	Dashboard shows no data
MKV5-7262	Fatal error when choosing 'Specify Multiple' in Reports
MKV5-7265	Fatal error when accessing Diary Entries Report
MKV5-7267	Fatal error when navigating to commission
MKV5-7274	Leadtime defaulting to 5 days if set to 0
MKV5-7293	Payment order of "0" acting as blank in the system
MKV5-7294	Setting a participant to be commissionable "At Participant Type Level" causes commissionable failure
MKV5-7303	Fatal error upon attempting to 'Print Fact Find'
MKV5-7304	Changing applicants on a product causes a fatal error
MKV5-7305	Fatal error when Fact Find answer number text field has a non-numeric text in it
MKV5-7306	Fatal error when a locked Fact Find answer number text field has a non-numeric text in it

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<b>MKV5-7311</b>	<b>Fatal Error when attaching product documents – site specific</b>
<b>MKV5-7313</b>	<b>Products don't display on business summary if they have no user assigned</b>
<b>MKV5-7325</b>	<b>Fatal error when attempting to enter Fact Find</b>
<b>MKV5-7330</b>	<b>Stage driven emails where recipient is an internal user failing</b>
<b>MKV5-7337</b>	<b>General Automation Rules not attaching report as expected</b>
<b>MKV5-7355</b>	<b>Written Statuses and Lender instalment configuration causing fatal error</b>
<b>MKV5-7383</b>	<b>Fatal error occurring when entering a case</b>
<b>MKV5-6681</b>	<b>E-signature requests that have failed cannot be 'Sent' again</b>
<b>MKV5-7202</b>	<b>SMS templates are not formatted correctly stage driven – site specific</b>
<b>MKV5-7220</b>	<b>Data not showing and shifting other columns in reports – site specific</b>
<b>MKV5-7243</b>	<b>Fatal error when reporting on tickbox type Simple Tasks</b>