finova

Broker Platform

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



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.

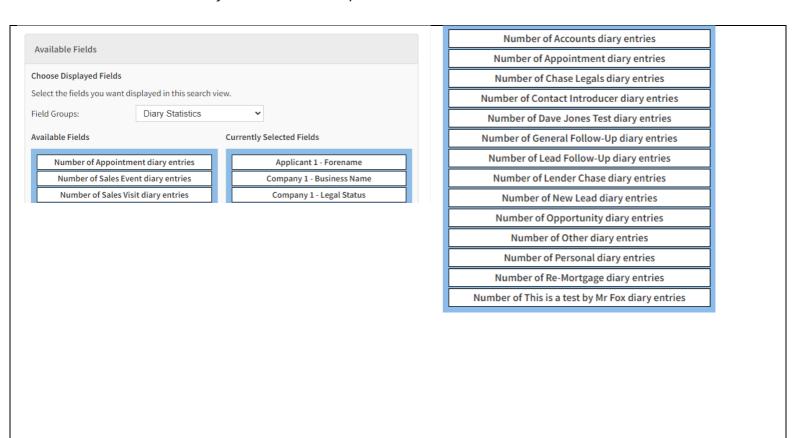


Highlights

Sort Data Table on Outgoing Commissions Page



- 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





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



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

finova

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