finova

CRM Release Notes for Version

[MKv5 – v7.45.0]

Broker Platform

Broker Support

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Introduction

These software release notes cover all system modifications for version MKv5 v7.45.0 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

- ### Send emails "From" Central Email Account

  We've made it easier to send emails "From" the email address specified under "Central Email Account" *(previously named "Email Server Details")*. "Central Email Account" can also be specified as the sender for Email Templates.

  For example, this could be set a company email address which you have eg.*info@yourbusiness.co.uk*.

New features in this release

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

Reference	Description
SCRM-4594	New Report Search View Item "All Diary Entries" available in "Diary Statistics"
SCRM-4610	Emails: "From" Central Email Account – Send emails from a shared email address
SCRM-4612	Template Emails: "From" Central Email Account

Bugs fixed in this release

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

Ticket Reference	Description
MKV5-7323	[site specific] - Inbound Email Not Working
MKV5-7363	Introducer Portal: Lead notifications are not coming through
MKV5-7376	[site specific] Unable to access site
MKV5-7377	[site specific] Fatal Error On Case
MKV5-7380	Fatal Error when trying to produce a document
MKV5-7384	LTI Calculating Incorrectly
MKV5-7398	Attached files show against "Customer on Product" finding attachments for customer with same PK (reference found in the URL) as commercial customer
MKV5-7400	[site specific] Fatal Error Exporting Report To Excel
MKV5-7402	"Maximum Times to Run:" not appearing on creation of product automation rule
MKV5-7405	[site specific] Fatal error appearing on when saving product
MKV5-7411	[site specific] Fatal error occurs when trying to send an email
MKV5-7420	(resolved) Special characters in saved search names on general automation rules prevents rule from running.
MKV5-7424	Can't create/edit fact find dropdown options
MKV5-7438	Email attachments going onto incorrect email when sender uses a manual email server setup
MKV5-7309	Diary entry time left blank sets itself to 00:00 on both
MKV5-7339	Connect Emails – Manual (SMTP) - Could not find mailbox for user
MKV5-7345	Fatal Errors when trying to delete commissions payments on a product
MKV5-7357	Cannot determine outbound mail details - refusing to send email
MKV5-7358	Cannot determine PK of email sender