



CRM Release Notes for Version [MKv5 – v7.46.0]

Broker Platform



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Introduction

These software release notes cover all system modifications for version MKv5 v7.46.0 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.

| Reference | Description |
|-----------|---|
| SCRM-4701 | Telesales Interface: Outcome Visibility |
| SCRM-4700 | Telesales Interface: Call Information Visibility |
| SCRM-4692 | Telesales Interface: Call to Outcome Workflow |
| SCRM-4605 | Telesales Interface: Attempt Tracker |
| SCRM-4598 | Telesales Interface: Reject & Turned Down Buttons |
| SCRM-4532 | Telesales Interface: Call Back Button |

Bugs fixed in this release

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

| Ticket Reference | Description |
|------------------|---|
| MKV5-7501 | 'Delete Case' option available in error when moving products to a different case |
| MKV5-7500 | The permission "Can delete OWN diary entries" still allows deletion of any diary entry |
| MKV5-7479 | Fatal Error when trying to change commission payments |
| MKV5-7475 | Automation Rules a Send Email action failing |
| MKV5-7476 | Bulk Emails failing to add attachments |
| MKV5-7473 | Emails with attachments are failing |
| MKV5-7470 | Outgoings Commissions export to excel failing |
| MKV5-7468 | Search view field commission total displays a blank output within a report |
| MKV5-7465 | Diary Entry deletion/removal when using Status driven Actions |
| MKV5-7460 | Fatal Error when adding Product merge fields to Document Templates – <i>Site Specific</i> |
| MKV5-7450 | Commission due filters failing |
| MKV5-7449 | Fatal error when accessing Outgoing Commissions |
| MKV5-7445 | "Delete Product" button is labelled "Delete Case" |
| MKV5-7443 | Solution Builder failing on Multi Benefit product types |
| MKV5-7439 | Edit button missing from Policy details Panel within Insurance Product Group Types |
| MKV5-7437 | Unlink option within emails failing |
| MKV5-7421 | Email Merge Field <<ItemsNotReceived>> fails to add Ad-Hoc requested documents |
| MKV5-7406 | Fatal Error when attempting to access Lenders/Providers from System Settings |
| MKV5-7373 | Fatal error occurring when attempting to "Pay Participants" – <i>Site Specific</i> |
| MKV5-7368 | Fatal error occurring when trying to edit document templates – <i>Site Specific</i> |
| MKV5-7230 | Participants Search Views failing when using Custom Fields |