

# finova

Broker Platform

CRM Release Note for Version  
[MKv5 – 7.33.0]

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## Introduction

These software release notes cover all system modifications for version MKv5 7.33.0 of the 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 eKeeper Quality Assurance Team.



## New features in this release

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

<b>Item Number</b>	<b>Description</b>
<b>SCRM-2883</b>	Error messaging update when using Twenty7Tec
<b>SCRM-2982</b>	Add Inbound Email functionality to Office365 API
<b>SCRM-3137</b>	Autofill Username removed when updating Password
<b>SCRM-3146</b>	Additional information provided when using eConveyancer
<b>SCRM-3178</b>	Add Multi-Product Support to Burrow Integration
<b>SCRM-3181</b>	Criteria capture and Result page for AiR Sourcing
<b>SCRM-3221</b>	Add missing fields to Insurance Search Views
<b>SCRM-3223</b>	Save KFI to attached files when received using AiR Sourcing
<b>SCRM-3233</b>	Combine Document requests in Burrow Portal when using Multi-Product
<b>SCRM-3266</b>	Add Role/Job Title to Participants
<b>SCRM-3273</b>	Adjusted wording for Burrow Portal invites and statuses
<b>SCRM-3318</b>	Save Sourcing Quote when using AiR Sourcing



## Bugs fixed in this release

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

Issue Number	Description
<b>MKV5-6452</b>	Dates disappearing from products – <i>Site Specific</i>
<b>MKV5-6521</b>	Dates disappearing from products – <i>Site Specific</i>
<b>MKV5-6737</b>	Dates disappearing from products – <i>Site Specific</i>
<b>MKV5-6573</b>	Lead Handling Teams fails upon leads arriving from Portal
<b>MKV5-6749</b>	Cannot view Email Attachments on sent outgoing emails
<b>MKV5-6750</b>	New document library embedded images not working in templates
<b>MKV5-6773</b>	Email Preview option failing
<b>MKV5-6795</b>	Burrow Fact Find PDF failing to produce
<b>MKV5-5310</b>	Solution Builder integration failing to import multiple quotes
<b>MKV5-5388</b>	When deleting a linked question in the fact-find the 'dead' link still appears
<b>MKV5-5569</b>	Regulated/Unregulated outputs as number when using in a Search View
<b>MKV5-5900</b>	Fee status Search View option failing
<b>MKV5-6442</b>	Burrow Fact Find error when entering Property Value and Property Price
<b>MKV5-6506</b>	Participant Type set to view only does not populate the Type field
<b>MKV5-6520</b>	Adding 'Titles' allows over 10 characters but only 10 characters will be saved
<b>MKV5-6524</b>	Email notification icon showing on all pages even though no new emails
<b>MKV5-6536</b>	'Next Stage Diary Entry Text' entries do not appear in Diary Report
<b>MKV5-6591</b>	Portal leads ignore Default Associated Users
<b>MKV5-6595</b>	Notifications failing to dismiss as expected
<b>MKV5-6626</b>	Days Summary failing to show within Business Summary
<b>MKV5-6655</b>	Twenty7Tec sourcing adds sourcing results to 'Unknown' file category type
<b>MKV5-6717</b>	Login timeout failing to notify until logging in a further login attempt is made
<b>MKV5-6745</b>	Postcode lookup clearing address fields upon selection of an address
<b>MKV5-6753</b>	Attaching files displays a permanent 'Uploading Files' message and fails to close the window
<b>MKV5-6758</b>	Bulk emailing error messages not showing in full
<b>MKV5-6774</b>	Issuing Fact Find to Burrow portal prior to client account setup causes 500 error