

# finova

Broker Platform

CRM Release Note for Version  
[MKv5 – 7.39.2]

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## Introduction

These software release notes cover all system modifications for version MKv5 7.39.2 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.

Item Number	Description
<b>SCRM-2191</b>	Advisers & Administrators can be recipients for email templates & via 'Send Email' (can be used with automation rules to send automated emails to internal users)
<b>SCRM-3613</b>	Solution Builder to pull back KFD policy summary
<b>SCRM-3624</b>	Add "Term Months" field to product details



## Bugs fixed in this release

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

Item Number	Description
<b>MKV5-6838</b>	Twenty7Tec error 404 recurrence
<b>MKV5-6895</b>	finova Client Portal find data dictionary issues
<b>MKV5-6931</b>	Search view pulling incorrect results through <i>(site specific)</i>
<b>MKV5-6936</b>	Adepteo integration/other miscellaneous generated case notes not working
<b>MKV5-6980</b>	KFIs not returning from Air
<b>MKV5-6992</b>	Protection reference missing from Business Summary
<b>MKV5-6994</b>	Solution Builder Quotes returned without KFD still display KFD button on Quote Detail view
<b>MKV5-7023</b>	Applicant address details cleared after adding them onto a mortgage product and saving
<b>MKV5-4621</b>	Incoming Commission Detail: Commission fee type does not output (the column is there but the info is missing)
<b>MKV5-5663</b>	De-selecting applicant(s) from LIFE (Life Cover) products won't save
<b>MKV5-5725</b>	Miscellaneous Product Groups errors
<b>MKV5-5862</b>	LTI Calculation failing to include existing loan amount
<b>MKV5-5944</b>	Footer blocking the last result when looking at the details of an Automation Rule
<b>MKV5-6902</b>	"Permissions Denied" when trying to produce a letter against a Participant
<b>MKV5-6912</b>	Diary entries created by completing simple tasks - remove on stage entry/exit
<b>MKV5-6916</b>	Sending stage driven email to multiple participants
<b>MKV5-6927</b>	Diary Entries - Priorities - Colour Coding
<b>MKV5-6929</b>	Cannot blank out 3+ fields at once
<b>MKV5-6932</b>	Notifications from products appear on cases with same PK number
<b>MKV5-6933</b>	finova Client Portal document acknowledgement notification failing when set to Case
<b>MKV5-6937</b>	Deleting stage doesn't remove Case Abandoned association
<b>MKV5-6954</b>	No document type restriction for 'Upload Alternative Template'
<b>MKV5-6958</b>	When you run the AiR integration on a Mortgage product with multiple applicants then all of the applicants will be selected against the quote despite being deselected
<b>MKV5-6979</b>	View Xplan Comparison - "Sorry. You do not have permission to view that file." <i>(site specific)</i>