

CRM Release Notes for Version

[v7.66.0 - v7.67.0]

Broker Platform

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Introduction

These software release notes cover all system modifications for version v7.66.0 and v7.67.0 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

**Customer portal updates**

Within the general settings of your customer portal, you can now set password expiry durations as well as choose the default note type for portal messages received from customers. We have also updated the background gradient to improve accessibility.

**Optimus conveyancing quotations**

Milestone updates for Optimus conveyancing quotes has been reinstated. You and your customers will now receive accurate updates for any conveyancing cases once instructed.

**Improved bulk emailing processing**

We have enhanced the system’s capability to handle larger volumes of email sends. With the latest update, you can now send larger volumes of emails in one go, removing the need to manually split email sends into smaller batches.

**Duplicate fact find templates** Now, you can easily duplicate and clone the different fact find structures you have in your CRM account. Streamline your workflow and save valuable time when creating multiple fact find templates tailored to the various types of business you write.

**Enhancements to our API capabilities**

We’ve expanded our API capabilities - third-parties can now seamlessly add notes to products within the CRM.

Bug fixes

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| Ticket Ref | Description |
| **MKV5-7985** | finova Digital Qualification Service - Issue for specific customer |
| **MKV5-7972** | Protection documents - Error in producing documents for protection products |
| **MKV5-7963** | Twenty7Tec integration - An error occurred whilst processing incoming documents |
| **MKV5-7962** | Xplan integration - An error occurred when mapping lender details from illustration in some circumstances |
| **MKV5-7958** | Unlayer email editor - Issue when creating email / mailto hyperlinks |
| **MKV5-7413** | Daylight saving time discrepancy for diary entries - Entries moving back an hour when synced with Outlook |
| **MKV5-7989** | Automated birthday emails - Not sending as expected, Issue for specific customer |
| **MKV5-7987** | Mortgage details panel - Not displaying correctly in some circumstances |
| **MKV5-7985** | Digital Qualification Service (DQS) - Error when transferring data to CRM |
| **MKV5-7980** | Documents - Error producing certain documents |
| **MKV5-7965** | Customer portal – Customers unable to receive messages on iPad Air  |
| **MKV5-7945** | Fact find - Issue when deleting fact find subsets |