



CRM Release Notes for Versions [v7.87.0 - v7.88.0]

Broker Platform



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Introduction

These software release notes cover all system modifications for versions **v7.87.0** – **v7.88.0** of the finova Broker CRM platform.

The release notes list the bug fixes and known issues provided in both releases and are aimed at system operational users.

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

Faster navigation at your fingertips

Maximise efficiency with our products dashboard widget, which streamlines your workflow. This feature automatically tracks your last 10 products, displaying them from most recent to oldest for quick access without searching.

Find applicants faster with email search

You can now quickly find applicants by entering their email address into the search bar at the top of every page.

Enhanced user assignments

Now, when fields are copied to a new product, assigned users—like advisers—will automatically transfer. If a Default Associated user is set to overwrite existing users, the default will be applied instead, ensuring seamless and accurate assignments.

Improved, smarter search

We have enhanced quick search to deliver faster, more accurate results. With improved performance, searches load more quickly, ensuring a more efficient and seamless user experience.

Bug fixes

Ticket Ref	Description
MKV5-8570	Improved dashboard loading speed
MKV5-8566	Resolved apostrophe-related display issues in the initial enquiry panel.
MKV5-8489	Stage-driven emails now work correctly for addresses containing an apostrophe.
MKV5-8558	Automation rules now run correctly across all applicable products.
MKV5-8551	Faster loading times for the Fact Find page.
MKV5-8550	Faster loading of Fact Find answer options.
MKV5-8556	Resolved issue where navigating the Fact Find sometimes caused an unexpected error.
MKV5-8548	Improved performance when loading Fact Find field effects.
MKV5-8545	Long dropdown items in simple tasks now display correctly without being cut off.
MKV5-8544	Auto-request for supporting documents may not trigger in certain cases.
MKV5-8543	Faster loading speed for the Fact Find page.
MKV5-8540	Improved notification logic between the CRM and Customer Portal.
MKV5-8539	Corrected incorrect "circular reference" errors for fields used across multiple Fact Find versions.
MKV5-8500	Fact Find answers from the Customer Portal now display correctly for review in all scenarios.
MKV5-8383	Resolved issue where some Customer Portal users couldn't view Fact Find page content.
MKV5-8608	Quick Search now correctly finds products using the lender reference.
MKV5-8606	Inactive options may still appear in dropdown menus and radio buttons on Fact Finds.
MKV5-8597	Quick search may not display protection products in certain cases.
MKV5-8594	"Add manual quote" button may be missing in certain cases.
MKV5-8591	Simple search may not work correctly if the user isn't assigned to a team.
MKV5-8589	Recent products widget – some links may not work as expected in certain cases.
MKV5-8588	Diary entries created via automation may show a start time, even when set to 'no time specified'.
MKV5-8578	Experian: Previous address validation incorrectly requires a house/building number, even when not applicable.
MKV5-8576	Improved performance of the recent products widget.
SCRM-8478	Corrected product subtype naming in the recent products widget.
MKV5-8547	Incorrect error appears when exporting to TriGold without a Fact Find added to the product.
MKV5-8502	Search results may show only one of two duplicate applicant records in some cases.
MKV5-8448	Customer Portal: 'Send Fact Find' rocket page may appear unexpectedly when opening a Fact Find.
MKV5-8431	Images added to HTML Document Templates may not appear in the PDF version.
MKV5-8108	Zapier protection product creation incorrectly treats customer contact number as mandatory.