

FINOVA

CRM Release Notes

Version [v7.90.0 & v7.91.0]



Broker Support



Broker.support@finova.tech

Finova.tech

6th Floor, Commodity Quay,
St Katharine Docks, London
E1W 1AZ

Introduction

These software release notes cover all system modifications for versions v7.90.0 and v7.91.0 of the Finova Broker CRM platform.

The release notes list the bug fixes and known issues provided in this release 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

V7.90.0

Column totals now added

We've updated the Business Intelligence widgets in Intermediary Manager CRM. Column totals will now be displayed beneath each MI graph.

V7.91.0

Smoother scrolling for user lists

We have fixed an issue where scrolling through long user lists on the dashboard would skip entries. You can now browse and select users smoothly, without missing anyone.

Clearer visuals for product sub-types

You can now assign colours and icons to each product sub-type, making it easier to identify and differentiate them in the recent products widget.

New event actions for Fact Find submissions

You can now set up custom actions in the customer portal, like triggering an email notification when an applicant submits their fact find.

Bug fixes

Ticket Ref	Description
MKV5-8659	We've fixed an issue where document types weren't mapping correctly to tick list categories when creating Burrow sub-tasks.
MKV5-8643	You'll now see case reference updates appear instantly on the summary tab — no need to save twice.
MKV5-8639	Linked Fact Find questions set to be hidden will no longer appear in printouts, even if made visible by a field effect.
SCRM-8600	We've improved POST request handling to reduce validation errors when using the REST API.
MKV5-8627	Report and saved search permissions now apply correctly when changes are made.
MKV5-8617	The Customer Portal will now remain responsive after completing acknowledgements or eSigning.
MKV5-8573	You'll no longer see a 403 error when exporting to AiR Sourcing
MKV5-8554	Merge fields in question text now appear correctly when printing the Fact Find.
MKV5-8515	The Fact Find dropdowns now work smoothly without causing the system to hang or become unstable.
MKV5-8459	Imported diary entries can now be adjusted without causing errors.
MKV5-8727	The Customer Portal no longer freezes after completing an eSign
MKV5-8715	The pencil icon is now visible again when viewing a profile.
MKV5-8710	ICS files now attach correctly to diary sync emails when using an Office365 central account.
MKV5-8709	Diary entries can now be edited by superusers and team members as expected.
MKV5-8708	The Twenty7Tec integration now opens correctly following the recent update.
MKV5-8707	Signed eSign documents now return correctly to the Customer Portal and CRM.
MKV5-8696	You can now add new entries to the transaction panel for the affected product without issues.
MKV5-8691	External documents set to show on the portal now appear correctly in the document history panel.
MKV5-8687	You can now add apostrophes to email addresses in the applicant profile without any issues.
MKV5-8686	After acknowledging a document in the Customer Portal, buttons and links now work without needing a page refresh.
MKV5-8670	All cases now appear correctly in quick search results.
MKV5-8669	Uploaded documents now display correctly on the client portal.
MKV5-8650	Automation rules now correctly set both start and end times for diary entries.