

New features in this release

There are 8 new features that have been released:

Story Number	Feature Description
MKV5-2366	An improved results search page when using the basic search has produced a new hover box for each application icon giving a quick view to the product details

Select	Applicant(s)	Case Reference	Mortgage	Buy to Let	Remortgage	Let to Buy	Product Transfer	Life Critical Illness and IP	Life Cover
<input type="checkbox"/>	Jane Doe	174		<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>	Mark Bonsall	176	<input checked="" type="checkbox"/>						
<input type="checkbox"/>	Joe Bloggys	180	<input checked="" type="checkbox"/>						
<input type="checkbox"/>	Terry James & Susan Middleton	MK-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
<input type="checkbox"/>	Richard Jones	310	<input checked="" type="checkbox"/>						
<input type="checkbox"/>	Roly Birkwood	338	<input checked="" type="checkbox"/>						

1 The Terrace

Property Address:
62 Macrae Road Pill Bristol ,
BS20 0DD

Lender
Barclays

Mortgage Amount
180,000.00


Term
25 years

Story Number	Feature Description
MKV5-2534	When creating actions against 'Simple Tasks' there is now a cancel option that will allow you to return to the 'Simple Task' you were creating

Actions For Task Status "Completed"

[Home](#) / [System Settings](#) / [SimpleTasks](#) / [Edit Existing Simple Task](#) / [Actions For Task Status "Completed"](#)

Actions

[Add an Action](#) 

No Actions Set Up

[Cancel](#)

[Top](#) 

Story Number	Feature Description
MKV5-2568	Added a new 'Active' column within the 'Action List' and the ability within each action to 'Activate/Deactivate'

Action List

[Home](#) / [System Settings](#) / [Action List](#)

Sequence	Action Description	Active	Action
5	Mortgage Note	✘	Edit
10	Protection Note	✘	Edit
20	Text Sent	✘	Edit
30	Phone Call Made	✘	Edit
40	Phone Call Received	✔	Edit
50	Fax Sent	✘	Edit
60	Fax Received	✘	Edit

Edit Action

[Home](#) / [System Settings](#) / [List Actions](#) / [Edit Action](#)

Action Details

Sequence Number:

Description:

Active:

Story Number	Feature Description
MKV5-2573	Following the addition of the GDPR consent panel, these fields are now linked to 'Fact Find' questions as "Linked Dropdown" questions

Essential Contact	Consent Provided	<input type="checkbox"/>
Essential Contact Letter	Yes	<input type="checkbox"/>
Essential Contact Email	Yes	<input type="checkbox"/>
Essential Contact Telephone	Yes	<input type="checkbox"/>
Essential Contact Text Message	Yes	<input type="checkbox"/>
Marketing Contact	Consent Provided	<input type="checkbox"/>
Marketing Contact Email	Yes	<input type="checkbox"/>
Marketing Contact Letter	No Yes	<input type="checkbox"/>
Marketing Contact Telephone		<input type="checkbox"/>
Marketing Contact Text Message		<input type="checkbox"/>
3rd-Party Contact	Consent Provided	<input type="checkbox"/>
Consent Wording	Test Word 1	<input type="checkbox"/>
Consent Supplied Method	Written	<input type="checkbox"/>
Consent Provided By	The Individual	<input type="checkbox"/>
Consent Provided By Other	Test	<input type="checkbox"/>
Consent Supplied Date	15/06/2018	

Story Number	Feature Description
MKV5-3019	<p>Restriction of commission enquires by team:</p> <ul style="list-style-type: none"> • Advisers within a firm can be set so they can see only their own commission • Firm principals or the commission team within a firm can be set to see all commission for that business/firm

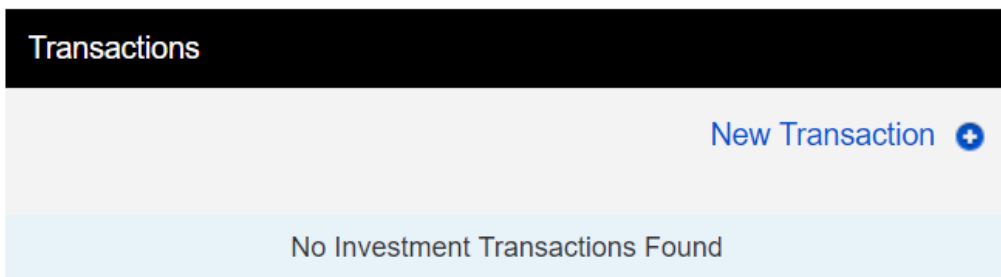
Participants Add Participant +

Type	Name	Company	Due Commission	Total Commission	Contact	Action
The Company	The eKeeper Group ?	eKeeper Group	Proc Fee, Broker Fee	205.87		Edit
Advisers	Mortgage Adviser ?	EKeeper Group	Proc Fee, Broker Fee	308.78		Edit
The Network	SMD	SMD	Proc Fee	45.35		Edit
Introducers	Liam Walsh ?	Cherry Orchard	Proc Fee			Edit

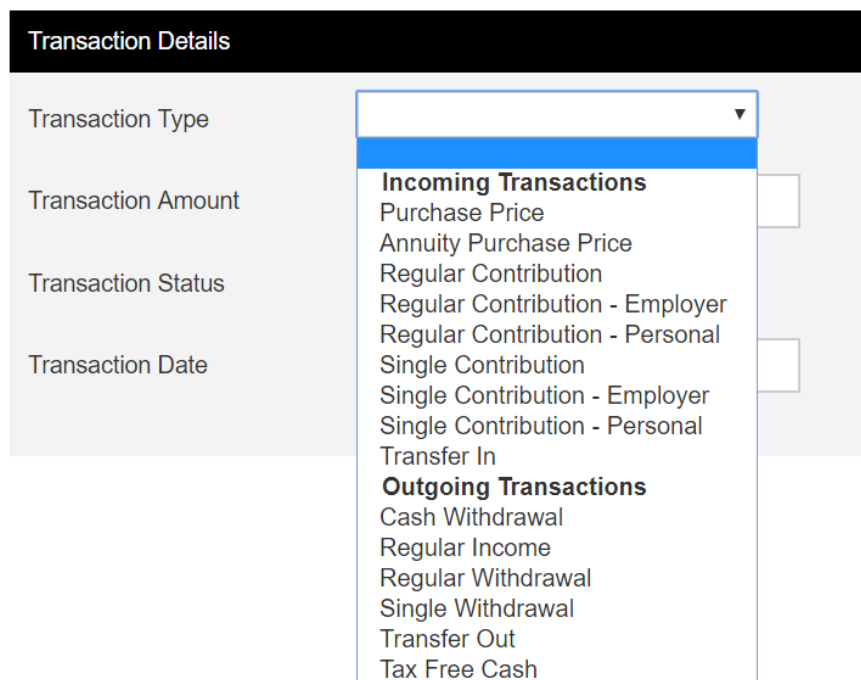
Commission Options Add Fee +

Fee	Amount	Based On	From	Status	Action																				
Proc Fee	<input type="text" value="560.00"/>	<input type="text" value="0.4"/> % of the mortgage amount	From the lender/provider	No Lender specified	Details Delete																				
<table border="1" style="width: 100%;"> <thead> <tr> <th>Pay To</th> <th>Based On</th> <th>Amount</th> <th>Payment Due Date</th> <th>Paid Date</th> </tr> </thead> <tbody> <tr> <td>SMD</td> <td>8.10% of the Fee</td> <td>45.35</td> <td></td> <td></td> </tr> <tr> <td>Mortgage Adviser</td> <td>60.00% of the Fee</td> <td>308.78</td> <td></td> <td></td> </tr> <tr> <td>The eKeeper Group</td> <td>The Remainder</td> <td>205.87</td> <td></td> <td></td> </tr> </tbody> </table>						Pay To	Based On	Amount	Payment Due Date	Paid Date	SMD	8.10% of the Fee	45.35			Mortgage Adviser	60.00% of the Fee	308.78			The eKeeper Group	The Remainder	205.87		
Pay To	Based On	Amount	Payment Due Date	Paid Date																					
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The eKeeper Group	The Remainder	205.87																							
Broker Fee	<input type="text" value="0.00"/>		from the customer	No amount specified	Details Delete																				
Total	560.00																								

Story Number	Feature Description
MKV5-3108	<p>Within the 'Wealth Desk' (e.g. Pension) there are new drop-down options available</p> <p>Under 'Transactions' the following additional options are added:</p> <ul style="list-style-type: none"> Regular Contribution - Employer Regular Contribution - Personal Single Contribution - Employer Single Contribution - Personal Annuity Purchase Price <p>Under the 'Outgoing Transactions' the following additional option is added:</p> <ul style="list-style-type: none"> Tax Free Cash



Edit Transaction



Story Number	Feature Description
MKV5-3165	A change to the way that the system handles cancelled insurance products; if the associated commission is not paid, upon saving into a cancellation status the system prompts the user to remove the commission amount. Equally when the commission has been paid then the cancellation process works


Term:


Lead Creation Date: 

Sign Up Date: 

On Risk Date: 


This product has been cancelled


Cancellation Reason: 

Cancellation Date: 

Cancellation Text:

Choose a different Task Status to un-cancel this product

Outcome Reason: 

Outcome Date: 

Outcome Text:

Outcome Reference:

Story Number	Feature Description
MKV5-3252	<p>When using the Print Fact-Find function, the page navigates to a Fact-Find Letter Generation page which notifies you of the status of the document generation and gives you the option to download the document</p> <p>There is now a button to navigate back a page</p>

Success - Document generated.



Factfind Letter Generation

Document Name	Action
MortgageDoc5c12737feaa3f.rtf	Download

[Finish](#)

[Top](#)

Story Number	Feature Description
MKV5-3342	The version number shown at the bottom of the DefaultPage.php has been updated to 6.27.2

Not Applicable	0
Clawed Back	0

MortgageKeeper V5 - Version 6.27.2 - [Contact Us](#)