

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

Cases Matching Your Criteria

[Home](#) / Results (7 matches)

Select	Applicant (s)	Case Reference	Mortgages & Commercial Loans				Protection	
			Mortgage ▼	Commercial Loan ▼	Buy to Let Mortgage ▼	Re-Mortgage ▼	Life & Critical Illness Cover ▼	Life Cover Only ▼
<input type="checkbox"/>	Frank Castle	Not Specified	Completed Awaiting Payment New Lead					
<input type="checkbox"/>	Frank Castle	Not Specified	Application Sent To Clients					
<input type="checkbox"/>	Frank Castle	Case-2366	Awaiting Outline Of Meeting				>>	⚙️
<input type="checkbox"/>	Frank Castle	Not Specified	New Lead					
<input type="checkbox"/>	Frank Castle	Not Specified	New Lead					
<input type="checkbox"/>	Frank Castle	Not Specified	New Lead					

Mrtg-115

Property Address:
5 Street Way, BS1 2BA

Lender
Alliance & Leicester Plc

Mortgage Amount
150,000.00

Term
30 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



Home



System Settings

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

Applicant 2 (Mrtg-83)

Essential Contact	Consent Provided	▼	✕
Essential Contact Letter		▼	✕
Essential Contact Email		▼	✕
Essential Contact Telephone		▼	✕
Essential Contact Text Message		▼	✕
Marketing Contact		▼	✕
Marketing Contact Email		▼	✕
Marketing Contact Letter		▼	✕
Marketing Contact Telephone		▼	✕
Marketing Contact Text Message		▼	✕
3rd-Party Contact		▼	✕
Consent Wording		▼	✕
Consent Supplied Method		▼	✕
Consent Provided By	Other	▼	✕
Consent Provided By Other			

Story Number	Feature Description
MKV5-3019	Restriction of commission enquires by team: <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

Incoming Commission

Filters

Filter By Team: All Teams ▼

Date Range:

- This Month
- Next Month
- This Week
- Don't Specify
- Year To Date
- Specific Dates

Group By

- Lenders/Providers
- Advisers
- Administrators
- Team

Show

- Show me my pipeline
- Show me written business
- Show me completed business
- Show me commission due
- Show me commission received

Fee Types

- Proc Fee
- Broker Fee
- Non Indemnity Commission
- Indemnity Commission
- Renewal Commission

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> <p>Regular Contribution - Employer Regular Contribution - Personal Single Contribution - Employer Single Contribution - Personal Annuity Purchase Price</p> <p>Under the 'Outgoing Transactions' the following additional option is added:</p> <p>Tax Free Cash</p>

Edit Transaction

Transaction Details

Transaction Type	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;">▼</div> <div style="background-color: #007bff; color: white; padding: 2px; margin-top: 2px;">Incoming Transactions</div> <div style="padding: 2px;">Purchase Price</div> <div style="padding: 2px;">Annuity Purchase Price</div> <div style="padding: 2px;">Regular Contribution</div> <div style="padding: 2px;">Regular Contribution - Employer</div> <div style="padding: 2px;">Regular Contribution - Personal</div> <div style="padding: 2px;">Single Contribution</div> <div style="padding: 2px;">Single Contribution - Employer</div> <div style="padding: 2px;">Single Contribution - Personal</div> <div style="padding: 2px;">Transfer In</div> <div style="background-color: #007bff; color: white; padding: 2px; margin-top: 2px;">Outgoing Transactions</div> <div style="padding: 2px;">Cash Withdrawal</div> <div style="padding: 2px;">Regular Income</div> <div style="padding: 2px;">Regular Withdrawal</div> <div style="padding: 2px;">Single Withdrawal</div> <div style="padding: 2px;">Transfer Out</div> <div style="padding: 2px;">Tax Free Cash</div> </div>
Transaction Amount	
Transaction Status	
Transaction Date	

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
MortgageDoc5bee638511.rtf	<a data-bbox="820 909 951 943" href="#" style="background-color: #0070c0; color: white; padding: 5px 10px; border-radius: 3px;">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](#)