

EKeeper Group

CRM Release Note for Version  
[MKv5 – 6.27.1]

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# Introduction

These software release notes cover all system modifications for version MKv5 6.27.0 of the eKeeper 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 eKeeper Quality Assurance Team.

# Bugs fixed in this release

This section lists identified bugs that have been fixed in this release.

## Blocked

Issue Number	Feature Description
<b>MKV5-2951</b>	Payments for the company participant were causing a refresh and no payments occurred

## Critical

Issue Number	Feature Description
<b>MKV5-3315</b>	Fatal error messages when accessing certain windows
<b>MKV5-3155</b>	Fact Find – If using Multiple tabs to editing dropdown questions errors occurred
<b>MKV5-3058</b>	Solution Builder is displaying in error when the feature is disabled
<b>MKV5-3052</b>	Unable to export product information to excel on customer search views
<b>MKV5-3036</b>	TLS 1.0 used for emails out of eKeeper CRM; switched to TLS 1.2
<b>MKV5-2990</b>	Unable to search date ranges for custom fields
<b>MKV5-2933</b>	Unable to search by applicant's phone number
<b>MKV5-3378</b>	Generated letters not generating when moving stages; there is a 'no letters to produce' prompt
<b>MKV5-3395</b>	The version number shown at the bottom of DefaultPage.php to be updated to 6.27.1

## Major

Issue Number	Feature Description
<b>MKV5-3274</b>	V3-V5 Conversion - View Profile Permissions were being set to Edit rather than recreating V3 selections
<b>MKV5-3271</b>	Bulk Action not working when used during Reporting/Search

<b>MKV5-3266</b>	Deleted Product leaves orphaned unpaid commission entries behind, only occurs in insurance products
<b>MKV5-3236</b>	Stage History records duplications on new product addition
<b>MKV5-3205</b>	LTV not showing on the case page, or within the view profile area. The LTV label was also not showing
<b>MKV5-3199</b>	Print Fact Find not available as an email attachment, despite being 'printed' into the Document History
<b>MKV5-3157</b>	Deleting a Participant leaves blank entries within the commissions
<b>MKV5-2865</b>	An info. only Fact Find ignores the character return lines and HTML Styling
<b>MKV5-2822</b>	Restrict Fees calculated from a percentage only for Mortgages
<b>MKV5-2799</b>	Consent supplied data causing browser to populate invalid data preventing applicant saves when new applicants added or existing edited
<b>MKV5-2745</b>	Field affects not working on the fact-find employment page
<b>MKV5-2715</b>	Security Answer not encrypted in Person or Participants table
<b>MKV5-2605</b>	Within Case Information and entering the fact find, saving defaults back to 'Edit'
<b>MKV5-2574</b>	Solution Builder - Cosmetic issues in the new quotes tab
<b>MKV5-2228</b>	Within 'Tick-List Categories' – 'Can Follow Later' is missing from V5
<b>MKV5-1675</b>	Within Trigold - Illustration - Audit Trail the data is not converted from V3 to V5
<b>MKV5-1574</b>	If a Fact Find section is Hidden but a question within is mandatory, it still appears on the cases fact find.
<b>MKV5-934</b>	Send to excel function from Loan Book Statistics Report will return an empty page instead of sending the information to an excel document
<b>MKV5-3345</b>	Missing header bar on ListStageGroups.php
<b>MKV5-3346</b>	No consent wording setup causing issues saving applicants; prompt to be given advising no consent wording available
<b>MKV5-3375</b>	Within Fact Find, a section that has been hidden by a field effect is still having its heading title being displayed

## Minor

<b>Issue Number</b>	<b>Feature Description</b>
<b>MKV5-3305</b>	The ticklist is stuck on 'outstanding' on the 'Product Transfer' product only

<b>MKV5-3282</b>	Archived protection status causing a recontact time of 5 days, even when set to zero
<b>MKV5-3250</b>	On IE- The 'Link' Image is not appearing in Fact-Find (shows a cross error)
<b>MKV5-3249</b>	£ signs not making it through to recipient when sending a text message
<b>MKV5-3241</b>	A bug where documents are being duplicated for participants
<b>MKV5-3239</b>	Stage permission link is in the wrong place and affects all products
<b>MKV5-3225</b>	Blank notification text when unlocking a locked customer with a notification
<b>MKV5-3211</b>	Setting a profile item to hidden on 'Product Type View Profiles' causes search view label to disappear
<b>MKV5-3203</b>	Cannot save Portal Settings when editing these
<b>MKV5-3172</b>	Diary entries displayed against the 'Show diary for time' space is misaligned
<b>MKV5-3171</b>	Satisfied field is not displayed correctly in 'Supporting Documents' section
<b>MKV5-3154</b>	Custom fields width not adjusting as expected
<b>MKV5-3147</b>	Commission section breaks up the stage change details when moving stages
<b>MKV5-3110</b>	Entering Commissions, the date received should not allow a future date
<b>MKV5-3104</b>	Layout issue on an applicant edit page when custom fields are used
<b>MKV5-3038</b>	Document history displaying incorrect sender, when send on behalf of another user
<b>MKV5-2989</b>	Occupation lookup only works when editing an applicant, not when creating a new applicant
<b>MKV5-2966</b>	Not all cases showing when searching by advisor
<b>MKV5-2827</b>	Commission image showing above the 'Home' link when in the maintenance process
<b>MKV5-2749</b>	Attaching a produced letter to an email, the system displays the incorrect recipient
<b>MKV5-2718</b>	Custom ticklist entry files not displaying filename when attaching to emails
<b>MKV5-2698</b>	Within the Fact Find Structures, the Min/Max field when setting a question it doesn't accept decimals when saving
<b>MKV5-2597</b>	Outgoing Commission Enquiry saving figures bug
<b>MKV5-2596</b>	Using Chrome and Adding Products when Double clicking or hitting the Enter Key multiple products are added
<b>MKV5-2591</b>	Mortgage 'Other Options' unable to remove the check if checked
<b>MKV5-2562</b>	Within Solution Builder, the Discard Quote Modal has cosmetic issues

<b>MKV5-2514</b>	The 'Edit' button in the Attached Files panel produces 502 Bad Gateway when clicking
<b>MKV5-2499</b>	Merge fields - Date Format - Does not display 0's
<b>MKV5-2401</b>	Occupation fields in the Fact Find don't display "inactive" when the page is locked if the occupation is actually inactive
<b>MKV5-2394</b>	When trying to produce HTML Documents on a product with an embedded image, errors 'Impossible to load image'
<b>MKV5-2391</b>	Cannot access stage groups with permission turned on
<b>MKV5-2384</b>	Remove ability to create product groups of type 'General Product'
<b>MKV5-2368</b>	Notifications panel not showing who notification is for following a 'summary for' user change
<b>MKV5-2343</b>	Deleted cases appearing on Expected Redemption Report
<b>MKV5-2287</b>	Unable to confirm filter on search results as the chosen filters hide behind the footer bar
<b>MKV5-2262</b>	When moving from 'Simple Tasks' to 'Actions', then returning it causes data to be lost
<b>MKV5-2167</b>	The ability to move products to incompatible product groups
<b>MKV5-2036</b>	Creation of new 'no answer informative text' type question within the 'Fact Find', the system provides a list of merge fields, when you click 'add' it fails
<b>MKV5-1954</b>	In the 'Fact Find' and the Radio Groups are set to mandatory, the ticking option does not unhighlight
<b>MKV5-1915</b>	With Mortgages and Loans enabled in V5 on the Business Summary, A'll Stages' on the 'Applications' column, the Loans override all Mortgage products meaning that only loans will display within the panel under 'Applications'
<b>MKV5-1898</b>	The system can have up to 4 "user types". Users 3 and 4 are set as disabled by default, but there is still reference to them around the system, despite them being disabled
<b>MKV5-1883</b>	Newly converted V5 sites prevent users from seeing the user allocation list if they are unlicensed
<b>MKV5-1843</b>	The search panel 'Simple Tasks' is not applying the 'Sequences Numbers' set in 'System Settings - Simple Tasks'
<b>MKV5-1773</b>	When setting up a new Automation Rule , attempting to 'Cancel' still saves the rule
<b>MKV5-1098</b>	Rounding error on calculator pages
<b>MKV5-110</b>	A blank user can be given for product ownership if no user assigned when changing the advisor or administrator