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
MKV5-2951	Payments for the company participant were causing a refresh and no payments occurred

Critical

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

Major

Issue Number	Feature Description
MKV5-3274	V3-V5 Conversion - View Profile Permissions were being set to Edit rather than recreating V3 selections
MKV5-3271	Bulk Action not working when used during Reporting/Search
MKV5-3266	Deleted Product leaves orphaned unpaid commission entries behind, only occurs in insurance products
MKV5-3236	Stage History records duplications on new product addition
MKV5-3205	LTV not showing on the case page, or within the view profile area. The LTV label was also not showing

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

Minor

Issue Number	Feature Description
MKV5-3305	The ticklist is stuck on 'outstanding' on the 'Product Transfer' product only
MKV5-3282	Archived protection status causing a recontact time of 5 days, even when set to zero
MKV5-3250	On IE- The 'Link' Image is not appearing in Fact-Find (shows a cross error)
MKV5-3249	£ signs not making it through to recipient when sending a text message

MKV5-3241	A bug where documents are being duplicated for participants
MKV5-3239	Stage permission link is in the wrong place and affects all products
MKV5-3225	Blank notification text when unlocking a locked customer with a notification
MKV5-3211	Setting a profile item to hidden on 'Product Type View Profiles' causes search view label to disappear
MKV5-3203	Cannot save Portal Settings when editing these
MKV5-3172	Diary entries displayed against the 'Show diary for time' space is misaligned
MKV5-3171	Satisfied field is not displayed correctly in 'Supporting Documents' section
MKV5-3154	Custom fields width not adjusting as expected
MKV5-3147	Commission section breaks up the stage change details when moving stages
MKV5-3110	Entering Commissions, the date received should not allow a future date
MKV5-3104	Layout issue on an applicant edit page when custom fields are used
MKV5-3038	Document history displaying incorrect sender, when send on behalf of another user
MKV5-2989	Occupation lookup only works when editing an applicant, not when creating a new applicant
MKV5-2966	Not all cases showing when searching by advisor
MKV5-2827	Commission image showing above the 'Home' link when in the maintenance process
MKV5-2749	Attaching a produced letter to an email, the system displays the incorrect recipient
MKV5-2718	Custom ticklist entry files not displaying filename when attaching to emails
MKV5-2698	Within the Fact Find Structures, the Min/Max field when setting a question it doesn't accept decimals when saving
MKV5-2597	Outgoing Commission Enquiry saving figures bug
MKV5-2596	Using Chrome and Adding Products when Double clicking or hitting the Enter Key multiple products are added
MKV5-2591	Mortgage 'Other Options' unable to remove the check if checked
MKV5-2562	Within Solution Builder, the Discard Quote Modal has cosmetic issues
MKV5-2514	The 'Edit' button in the Attached Files panel produces 502 Bad Gateway when clicking
MKV5-2499	Merge fields - Date Format - Does not display 0's
MKV5-2401	Occupation fields in the Fact Find don't display "inactive" when the page is locked if the occupation is actually inactive

MKV5-2394	When trying to produce HTML Documents on a product with an embedded image, errors 'Impossible to load image'
MKV5-2391	Cannot access stage groups with permission turned on
MKV5-2384	Remove ability to create product groups of type 'General Product'
MKV5-2368	Notifications panel not showing who notification is for following a 'summary for' user change
MKV5-2343	Deleted cases appearing on Expected Redemption Report
MKV5-2287	Unable to confirm filter on search results as the chosen filters hide behind the footer bar
MKV5-2262	When moving from 'Simple Tasks' to 'Actions', then returning it causes data to be lost
MKV5-2167	The ability to move products to incompatible product groups
MKV5-2036	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
MKV5-1954	In the 'Fact Find' and the Radio Groups are set to mandatory, the ticking option does not unhighlight
MKV5-1915	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'
MKV5-1898	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
MKV5-1883	Newly converted V5 sites prevent users from seeing the user allocation list if they are unlicensed
MKV5-1843	The search panel 'Simple Tasks' is not applying the 'Sequences Numbers' set in 'System Settings - Simple Tasks'
MKV5-1773	When setting up a new Automation Rule , attempting to 'Cancel' still saves the rule
MKV5-1098	Rounding error on calculator pages
MKV5-110	A blank user can be given for product ownership if no user assigned when changing the advisor or administrator