

EKeeper Group

CRM Release Note for Version  
[MKv5 – 6.29.0]

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# Introduction

These software release notes cover all system modifications for version MKv5 6.29.0 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.

## Critical

Issue Number	Description
<b>MKV5-2842</b>	When using the bulk email via the reporting functionality the system displays a message stating "Your emails have been queued and will be sent shortly" however the emails do not send
<b>MKV5-2685</b>	Bulk emails were not being sent automatically due to an issue with the ProcessEmailQueue.php

## Major

Issue Number	Description
<b>MKV5-3304</b>	When an automated diary entry is created upon a stage move, and specify a set time for the diary entry, the diary entry is created but no time is set
<b>MKV5-3265</b>	When adding an automated rule to 'Create Notification' this is not creating as expected

## Minor

Issue Number	Description
<b>MKV5-2733</b>	Automation Rules are working only for Mortgage and Loan products

# New features in this release

This section lists features that have been deployed in this release.

## Automation Rules - Epic

Issue Number	Description
<b>MKV5-3276</b>	<b><i>Automation Rules – all existing rules will need to be reactivated as this change has 'turned off' existing rules you may have</i></b>

Issue Number	Description
<b>MKV5-3369</b>	Automation rules can now be linked to Product Expiry Dates

**Match Details**

Product Type:

At Stage(s)  [\[Specify Multiple\]](#)

Criteria

Product Expiry Date

- Older than
- Older than
- Within
- 
- Hours
- Days
- Weeks
- Months
- Years

Issue Number	Description
<b>MKV5-3156</b>	Two new action types have been added - Send Email and Send SMS

## Edit Action

**Action Details**

Action Type:	<div style="border: 1px solid #ccc; padding: 2px;"> Change Advisor ▼  Create Diary Entry  <b>Change Advisor</b>  Change Advisor Team  Send Email  Send SMS  Create Notification  Populate A Field  Change Stage </div>
Change To:	
Create Case Note:	

## Major

Issue Number	Description
<b>MKV5-3285</b>	Automation rules can now be linked to multiple stages

**Match Details**

Product Type:	<div style="border: 1px solid #ccc; padding: 2px;"> Mortgage ▼ </div>
At Stage(s)	<div style="border: 1px solid #ccc; padding: 2px;"> <input style="width: 100%;" type="text"/> ▼ [Specify Multiple] </div>
Criteria	<div style="border: 1px solid #ccc; padding: 2px;"> Last Case Status Change ▼ </div>
Time Since Last Stage Change:	<input style="width: 50px;" type="text"/> <input style="width: 100px;" type="text"/> ▼

### Select Stages



<input type="checkbox"/>	Chasing Lead
<input type="checkbox"/>	Appointment Arranged
<input type="checkbox"/>	Market Research
<input type="checkbox"/>	DIP Approved
<input type="checkbox"/>	Application Submitted
<input type="checkbox"/>	Out-Standing Information
<input type="checkbox"/>	Valuation Instructed
<input type="checkbox"/>	Valuation Received
<input type="checkbox"/>	Offer Issued
<input type="checkbox"/>	Exchanged
<input type="checkbox"/>	Completed Awaiting Payment

### Critical

Issue Number	Description
<b>MKV5-3738</b>	Update version to 6.29.0

Paid	3	1
Not Applicable	0	none
Clawed Back	0	none

MortgageKeeper V5 - Version 6.29 - [Contact Us](#)