

EKeeper Group

CRM Release Note for Version [MKv5 – 6.30]

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Introduction

These software release notes cover all system modifications for version MKv5 6.30 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
MKV5-3800	Portal login details generated by a stage move for all applicants
MKV5-3775	Users being able to see other teams/users' notifications
MKV5-3725	Settings panel missing detail turns 'include letters' (to portal) off
MKV5-3643	Phone Number merge-fields linked incorrectly
MKV5-3642	Stage-driven email template merge-field subject line failure
MKV5-3524	Clawback commission not registering
MKV5-3864	Simple tasks actions create 'Invalid Action'
MKV5-3807	Invalid number results if comma is used when exporting reports to CSV

Major

Issue Number	Description
MKV5-3823	Trigold fatal error
MKV5-3818	Customer notifications fatal error
MKV5-3773	Increase MKSettingValue field length
MKV5-3709	Missing edit links for diary entries on week and month views for home page and against a product
MKV5-3631	Supporting document 'from who' entries not holding active status
MKV5-3612	Merge fields not populating into fact-find letter and other letters
MKV5-3605	Error message when editing 'Standard Letter' file category
MKV5-3599	Customer portal not prompting password reset on first login
MKV5-3538	Document template merge-field cleanse
MKV5-3302	Unable to attach HTML generated letter (PDF) to stage generated email
MKV5-3457	Create bulk email causes recipient issues including duplicates

Minor

Issue Number	Description
MKV5-3785	Email templates not saving as 'Raw HTML'
MKV5-3771	Merge fields not working in email subjects when email is stage generated
MKV5-3679	Diary Entry priorities no longer colour coded
MKV5-3632	'Risk Profiles' not updating in 'Funds'
MKV5-3627	Misalignment of drop downs within Product Tracking Page
MKV5-3581	Styling error when using Bulk Upload
MKV5-3576	Exporting report to Excel - custom field column failure
MKV5-3553	'All applicants Names' (protection) search view option field outputs in HTML
MKV5-3536	Applicant notes not displaying correctly
MKV5-3478	Merge field populating with the wrong data when using <<MortgageUserDaytimePhone>> merge field
MKV5-3626	Quick search allows check all/uncheck all functionality

New features in this release

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

Server Updates

Feature Number	Description
MKV5-3790	System security update
MKV5-3813	Server schedule update
MKV5-3832	Upgrade to server detail

Features

Feature Number	Description
MKV5-3574	Able to search for a combined forename and surname when adding existing clients to cases

Customers

Search Customers

 ×

Enter part of the customers name, address or email to find them.

Filter Customers

Advisor

To add additional filters click the plus symbol, to remove them click the minus symbol.

Show entries

Surname	Forename	Address	Postcode	Telephone	Mobile	Email	Action
Day	Charlie			01275400650	07792334030		Select

Showing 1 to 1 of 1 entries (filtered from 64 total entries)

Feature Number	Description
MKV5-3325	Update permissions so that the IP restrictions are configurable within Global Settings

Participants

Label for Participant (singular):

Label for Participants (plural):

User Role Description and Settings (Advisors/Administrators)

Definition for Advisor:

Definition for Administrator:

Use User 3:

Definition for User 3:

Use User 4:

Definition for User 4:

EchoSign Integration

EchoSign Integration in Use: Yes No

Restrict IP Addresses

Can maintain permitted IP addresses: Yes No

Feature Number	Description
MKV5-3522	Add ability to upload into Custom Fields within the CSV (bulk) upload

Bulk Upload

[Home](#) / [System Settings](#) / Bulk Upload

Upload File

- Feel free to remove headings as you see fit, however do NOT alter them.

What would you like to upload? Mortgage Sub-Type

Attach File:

No file chosen

Uploads will begin momentarily after submission, provided that no validation errors have occurred.

You can check the status of your upload below, any uploads that have not been run will stay in a holding status until complete.

File Name	Upload Type	Date Created	Number of Rows	Status	Action
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Feature Number	Description
MKV5-3540	Add Filter to 'Action Notes'

Action Histories

Statistics
Action Note Filter
Add Action History

- File Note
- Text Sent
- Phone Call Made
- Phone Call Received
- Fax Sent
- Fax Received
- E-Mail Sent
- E-Mail Received
- Letter Sent
- Letter Received
- SCANNING
- POST
- See Attached Documents
- Factfind Amendment
- Underwriter Handover Notes
- Date PIF Sent
- complaint

No Action History Found

Feature Number	Description
MKV5-3770	Missing email icon within 'Participants' panel

Participants

Add Participant


Type	Name	Company	Due Commission	Total Commission	Contact	Action
Advisers	Michael Ttooulis		Proc Fee, Broker Fee			Edit

Feature Number	Description
MKV5-3233	Merge-field functionality for customer custom fields

Edit Custom Field

[Home](#) / [System Settings](#) / [List of Custom Fields](#) / Edit Custom Field

Custom Field

Sequence No:	<input type="text" value="5"/>
Category Description:	<input type="text" value="Marketing permission"/>
Prefix: 	<input type="text"/>
Data Type:	<input data-bbox="539 929 976 981" type="text" value="Dropdown List"/>
Merge Name:	<input type="text"/>