

EKeeper Group

CRM Release Note for Version
[MKv5 – 6.36.3]

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Introduction

These software release notes cover all system modifications for version MKv5 6.36.3 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.

New features in this release

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

Major

Issue Number	Description
SCRM-556	Enabling of Data Dictionary Custom Field mappings
SCRM-557	Enabling of Data Dictionary Fact Find mappings
SCRM-558	Enabling of Data Dictionary field assignments by permission
SCRM-559	Data Dictionary field assignment not allowing duplicates
SCRM-584	Allow notification configuration for new leads via email
SCRM-707	Allow upload of files containing .aspx detail
SCRM-815	Update Aventria integration to use Optimus branding

SCRM-728	Additional fields mapped when using the Twenty7Tec integration
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- New fields added to integrate with Twenty7Tec:
 - Country
 - Title
 - Middle Name
 - Employment Status
 - Term
 - Lender
 - Lender Product Reference
 - Buyer Type – can be configured as below:

Edit Buyer Type

[Home](#) / [System Settings](#) / [Edit Buyer Type](#)

Buyer Type Details

Sequence Number:	<input type="text" value="10"/>
Description:	<input type="text" value="Homeowner"/>
TriGold Mapping:	<input type="text" value="Homeowner"/>
Twenty7Tec Mapping:	<input type="text" value="Please Select..."/>
Active:	<input type="checkbox"/>

- Please Select...
- Please Select...
- No Current Mortgage
- Existing Mortgage Single
- Existing Mortgage Joint
- First Time Buyer

- This optional integration works simply through use of an affiliate link in an email
- A new email template called "UK Credit Ratings" will be added into your eKeeper CRM which will contain HTML coding to create an email that will integrate with UK Credit Ratings
- UK Credit Ratings supply customers with copies of their credit reports for no up-front cost. Customer's sign up for this service and only pay after 14 days

NEW Email Template

Default Sender:

Name:

Stage:

Status:

Produce this document on all new products:

Recipient:

Ticklist Trigger: Trigger this email when a tick list item's details change [?]

Raw
(for inserting third-party HTML):

Letter Tag

(to identify this as a triggered email):

Subject:

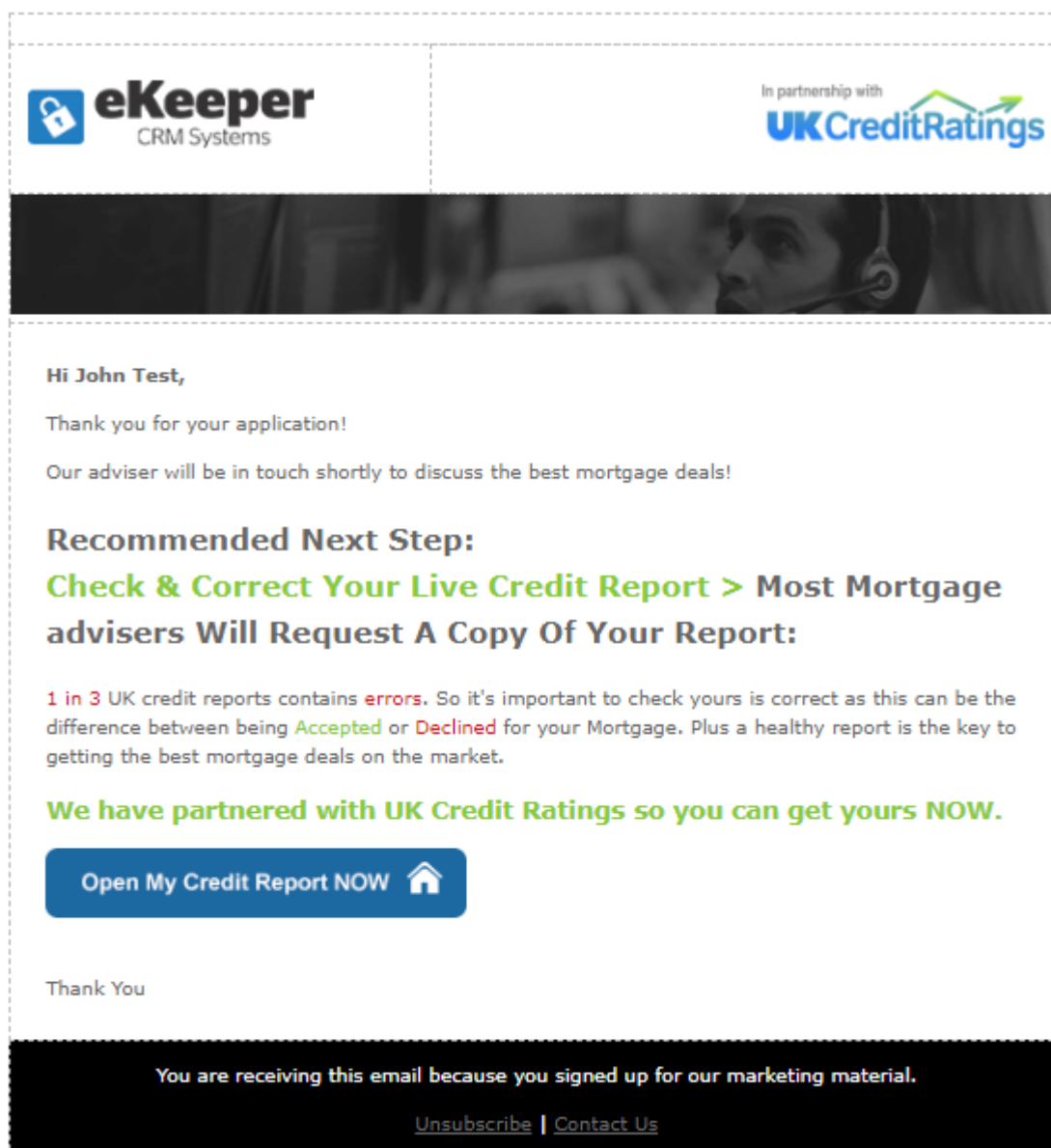
Email Body:

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<div style="max-width: 607px;">
<table style="border-collapse: collapse; color: #666666; font-family: sans-serif; line-height: 1.6;" border="0" width="100%" cellpadding="0">
<tbody>
<tr>
<td colspan="2">&nbsp;</td>
</tr>
<tr>
<td style="padding-left: 10px; align="left" width="40%" height="85"></td>
<td style="padding-right: 10px; align="right"></td>
</tr>
<tr>
<td colspan="2"></td>
</tr>
<tr>
<td style="padding: 10px 20px;" colspan="2">
<p style="font-weight: bold;">Hi <<ForenameSurname>>,</p>
<p>Thank you for your application!</p>
<p><Our adviser will be in touch shortly to discuss the best mortgage deals!</p>
<p style="font-size: 17px; font-weight: bold;">Recommended Next Step: <br /> <span style="color: #88ca37;">Check & Correct Your Live Credit Report </span> Most Mortgage advisers Will Request A Copy Of Your Report.</p>
<p><span style="color: #cc141e;">1 in 3</span> UK credit reports contains <span style="color: #cc141e;">errors</span>. So it's important to check yours is correct as this can be the difference between being <span style="color: #88ca37;">Accepted</span> or <span style="color: #cc141e;">Declined</span> for your Mortgage. Plus a healthy report is the key to getting the best mortgage deals on the market.</p>
<p><strong style="font-size: 14px; color: #88ca37;"> We have partnered with UK Credit Ratings so you can get yours NOW. </strong></p>
<p><a href="<<UKCreditRatings>>">  </a></p>
<p><br /> Thank You</p>
</td>
</tr>
<tr>
<td style="color: #ffffff; font-size: 11px; text-align: center; background: #000000;" colspan="2">
<p>You are receiving this email because you signed up for our marketing material.</p>
<p><a style="color: #8e8e8e;" href="http://www.rsprkr.com/oo/oo.php?cid=335&agentid=420717">Unsubscribe</a> | <a style="color: #8e8e8e;" href="https://www.ukcreditratings.com/credit/contact">Contact Us</a></p>
</td>
</tr>
</tbody>
</table>
</div>

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NEW Email Template Output



Bugs fixed in this release

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

Critical

Issue Number	Description
SCRM-858	Unable to report on archived stage types
SCRM-863	Link participant to existing user failing

Major

Issue Number	Description
SCRM-864	Commissions report exports do not show product name on all reports
SCRM-866	Exporting a payment run to Word fails to add the product reference on all clawbacks