EKeeper Group

CRM Release Note for Version [MKv5 – 6.37.1]

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Introduction

These software release notes cover all system modifications for version MKv5 6.37.1 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.

Critical

Issue Number	Description
SCRM-1191	Allow conveyancing quote details to be referenced in generated documents

Major

Issue Number	Description
SCRM-918	Configure Payment Shield credentials within User Settings in preparation for forthcoming integration

Bugs fixed in this release

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

Critical

Issue Number	Description
SCRM-860	Uninsure integration failure
SCRM-945	Unable to remove attached files within Supporting Documents/Ticklists
SCRM-948	Incoming commissions discrepancies
SCRM-993	Monthly reports not showing specific commissions within results
SCRM-994	Search view columns from Commission/Related Products areas ignore received amounts
SCRM-1156	Cannot report on stages or statuses that are set to not show product on tabs
SCRM-1170	Users cannot save or amend Email Templates
SCRM-1203	Commission splits not displaying correctly
SCRM-1208	Performance update

Major

Issue Number	Description
SCRM-611	Searching with both customer and product custom fields causes fatal error
SCRM-953	Simple tasks not available when creating search views
SCRM-1037	Supporting document prerequisites failing
SCRM-1041	Clawback dates failing to save
SCRM-1042	Unable to uncheck check box on Fact Find
SCRM-1044	Participant merge fields mapping to customer fields in error
SCRM-1159	Monthly Fee rounding up when reporting
SCRM-1162	Filter by team commissions reporting failing
SCRM-1168	Advisor filter on address book failing
SCRM-1171	No confirmation message when deleting field effect
SCRM-1174	SMS template fails to send when using Internet Explorer if the body contains a £ sign
SCRM-1196	Stage driven actions showing incorrect values

Minor

Issue Number	Description
SCRM-1165	Saving a 'Handling Team' redirect issue
SCRM-1167	Customer Custom Fields has incorrect location