

EKeeper Group

CRM Release Note for Version  
[MKv5 – 7.13.2]

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# Introduction

These software release notes cover all system modifications for version MKv5 7.13.2 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
<b>SCRM-1842</b>	New permission to hide commission panel against Participant

## Major

Issue Number	Description
<b>SCRM-1104</b>	5X Notification functionality improvements
<b>SCRM-1681</b>	Improvements to the Diary; Day & Week view now show appointments in time slots
<b>SCRM-1742</b>	Force password reset and allow password reset duration to be configured – <i>Site Specific</i>
<b>SCRM-1782</b>	Portal profile branch branding association - Customers
<b>SCRM-1784</b>	Portal profile branch branding association - Participants
<b>SCRM-1781</b>	Ability to create a Portal Admin User and allow creation of portal profiles
<b>SCRM-1872</b>	New View Profile feature to allow access to Applicant(s) tick boxes
<b>SCRM-1872</b>	Add View Profile to allow configuration of Product Applicants

# Bugs fixed in this release

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

## Blocker

Issue Number	Description
<b>MKV5-5696</b>	Pagination display issues when using specific Search Views
<b>MKV5-5103</b>	Business Summary Product column displays the Product Group instead of the Product Name
<b>MKV5-5767</b>	Display issue requiring cache refresh

## Critical

Issue Number	Description
<b>MKV5-4740</b>	Fact Find Print Out Issues when £ sign is used
<b>MKV5-5545</b>	Consecutive failed login attempts does not disable the user
<b>MKV5-5553</b>	Blank screens when editing customer- <i>Site Specific</i>
<b>MKV5-5252</b>	Stage driven diary entries failing – <i>Site Specific</i>
<b>MKV5-5381</b>	Copying User Permission Groups does not copy View Profiles as expected
<b>MKV5-5609</b>	Field Effects failing on subsets – <i>Site Specific</i>
<b>MKV5-5658</b>	Error 500 or fatal error when using the Copy Fact Find functionality
<b>MKV5-5657</b>	Automation rules failing to send SMS'
<b>MKV5-5677</b>	Smart Search returns no results when criteria has been met

## Major

<b>Issue Number</b>	<b>Description</b>
<b>MKV5-5100</b>	5X Business Summary – Statuses widget displays Stages
<b>MKV5-5464</b>	PaymentShield errors when attempting to perform sourcing
<b>MKV5-5542</b>	Field effects on a Fact Find Calculator page failing
<b>MKV5-5549</b>	Fact Find Disable Field not functioning correctly
<b>MKV5-5560</b>	Unable to disable Stage Prerequisites – <i>Site Specific</i>
<b>MKV5-5603</b>	Inbound emails failing – <i>Site Specific</i>
<b>MKV5-4907</b>	Page display issues when using browser zoom function
<b>MKV5-5632</b>	Page moving when diary entries highlighted
<b>MKV5-5640</b>	Unable to add multiple merge fields to a document
<b>MKV5-5672</b>	Solution Builder integration failure
<b>MKV5-5669</b>	Solution Builder integration failing in specific browsers
<b>MKV5-4802</b>	Jump to Fact Find dropdown not showing on Fact Find Calculator pages
<b>MKV5-5616</b>	Hidden products incorrectly show within Business Summary
<b>MKV5-5631</b>	Insurance Search Views containing the Commission Status column causes page load failure
<b>MKV5-5674</b>	Business Summary ordering incorrectly
<b>MKV5-5675</b>	When changing the % of a fee to any variation of 0 the commission does not update
<b>MKV5-5705</b>	Applicant address fields change to non-structured address following save of details where no address had been entered
<b>MKV5-5710</b>	Adding Branches fails
<b>MKV5-5752</b>	Product Timeline displays differently within different browsers
<b>MKV5-5693</b>	Secondary Cancellation Reason edit page has incorrect breadcrumb