EKeeper Group

CRM Release Note for Version [MKv5 – 7.14.1]

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Introduction

These software release notes cover all system modifications for version MKv5 7.14.1 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-2026	Addition of Product Permissions
SCRM-2029	Product ownership - Restrict products on dashboard(s) based on Product Permissions
SCRM-2030	Product ownership - Restrict products on case page based on Product Permissions

Major

Issue Number	Description
SCRM-1991	Diary Entries Reporting within Version 5X
SCRM-1993	Additional logic to allow Inbound Email functionality to work for emails created within by Automation Rules
SCRM-1994	Optimus Conveyancing: Display other solicitors
SCRM-1995	Optimus Conveyancing: Allow the selection of an "other solicitor"
SCRM-2032	Stage driven SMS' should only apply and sent to 'ticked' applicants on product

Bugs fixed in this release

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

Blocker

Issue Number	Description
MKV5-5848	Unable to add new customer – *Site Specific*
MKV5-5859	Notifications no longer show Date and Time

Critical

Issue Number	Description
MKV5-5576	'Recipient' merge fields not working when used within Email Templates
MKV5-5764	Incorrect inbound emails linked to products – *Site Specific*
MKV5-5787	Unable to upload documents over 3mb
MKV5-5836	Notification panel on homepage 'spinning' continuously

Major

Issue Number	Description
MKV5-3945	Forwarding emails from Document History loses attachment
MKV5-5101	User dropdown failing and showing limited options
MKV5-5568	Lender lead times defaulting to 0 and overriding stage lead times
MKV5-5571	Some Products now showing as expected on Search Views – *Site Specific*
MKV5-5590	Supporting Documents statuses failing
MKV5-5707	Customer title defaulting to Mrs – *Site Specific*
MKV5-5715	'Print Fact Find' loads incorrect detail – *Site Specific*
MKV5-5755	Inbound Emails failing for specific users – *Site Specific*
MKV5-5772	Customer assigned Diary Entries failing to contain link to Customer
MKV5-5780	Document selection pagination failure