

EKeeper Group

CRM Release Note for Version [MKv5 – 7.16]

Introduction

These software release notes cover all system modifications for version MKv5 7.16 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-2	Diary synchronisation settings
SCRM-1200	Dashboard General – Search Improvements
SCRM-1201	Dashboard Search Results – Breadcrumb correction
SCRM-1653	Receive the updates on DocuSign eSignature requests
SCRM-1883	Retrieve copy of signed document from DocuSign
SCRM-2033	Bulk SMS sending to Product Applicants
SCRM-2117	Enhanced Stage Actions when API used
SCRM-2150	Business Summary widgets based on user access

Bugs fixed in this release

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

Critical

Issue Number	Description
MKV5-5914	Protection products creating new Cases when using Bulk Upload
MKV5-5921	Commission showing for an adviser in error
MKV5-5952	Unable to access Xplan comparison documentation

Major

Issue Number	Description
MKV5-5826	Report results pages not functioning correctly when selecting
MKV5-5827	Bulk emails not sending to correct recipient
MKV5-5889	Opening attached Supporting Documents causes fatal error
MKV5-5950	Commission exceeds 100% error message doesn't take into account payment order
MKV5-5954	'Declined' badge colour in help popover showing incorrectly
MKV5-5888	Protection status incorrect naming