

EKeeper Group

# CRM Release Note for Version [MKv5 – 7.23]

# Introduction

These software release notes cover all system modifications for version MKv5 7.23 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
<b>SCRM-5</b>	Edited diary entries within eKeeper CRM sync to external calendar
<b>SCRM-2291</b>	In depth error messages when Bulk Emailing and Queue Management
<b>SCRM-2374</b>	Castlight logo change to Experian
<b>SCRM-2454</b>	Stage/Status mapping maintenance to the Burrow Portal statuses
<b>SCRM-2484</b>	Participant permissions by type when reviewing commissions
<b>SCRM-2542</b>	Document template additional specification to allow Burrow Signatures
<b>SCRM-2545</b>	Associate E-Signature request to Burrow Portal
<b>SCRM-2546</b>	Retrieve E-Signed documents from Burrow Portal
<b>SCRM-2552</b>	Warning message cancelling Diary Event only cancels in eKeeper CRM and not in external calendar
<b>SCRM-2553</b>	Warnings message when Diary Event is updated in eKeeper CRM causing "out of sync" with external calendar
<b>SCRM-2592</b>	Addition of Two Factor Authentication details to User Details
<b>SCRM-2595</b>	Logging in page simplified for easier password resets
<b>SCRM-2596</b>	Addition of an 'All' option to Participants associated with users' option

# Bugs fixed in this release

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

## Critical

Issue Number	Description
<b>MKV5-6252</b>	Simple task symbol in tracking not updating – <i>Site Specific</i>
<b>MKV5-6310</b>	Drop down repeating fields bug within Fact Find
<b>MKV5-6321</b>	Attachments being incorrectly added to emails
<b>MKV5-6352</b>	TriGold illustration not syncing to CRM provider selection
<b>MKV5-6363</b>	Email templates failing to send

## Major

Issue Number	Description
<b>MKV5-6174</b>	Supporting document entries not producing for all applicants
<b>MKV5-6192</b>	Team based permissions failing for a specific User Group – <i>Site Specific</i>
<b>MKV5-6197</b>	Conveyancing panel issue – <i>Site Specific</i>
<b>MKV5-6284</b>	Ulnsure 'Apply' button failing
<b>MKV5-6287</b>	Business Summary products not listing expected entries and generating red error message – <i>Site Specific</i>
<b>MKV5-6305</b>	Occupation Search View option generates coding rather than Occupation when reporting
<b>MKV5-6311</b>	'Name Not Specified' added to product rather than completed applicant details
<b>MKV5-6318</b>	Typo in fact find help text