



EKeeper Group

# CRM Release Note for Version [MKv5 – 7.25]



# Introduction

These software release notes cover all system modifications for version MKv5 7.25 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.

Item Number	Description
<b>SCRM-2614</b>	AML/Credit Check: Pre-validation before submission
<b>SCRM-2626</b>	HTTP Posting: Fix Missing/Broken Fields
<b>SCRM-2224</b>	Allow search by postcode prefix
<b>SCRM-2233</b>	Add version number to 5X dashboard
<b>SCRM-2296</b>	Show the indicators of the doc upload lifecycle between eKeeper and Burrow
<b>SCRM-2450</b>	Detect browser to switch between ActiveX and chrome extension for document editing
<b>SCRM-2547</b>	Update Product Documents panel to show logos for Burrow Sign
<b>SCRM-2548</b>	Notify when e-signature is received from Burrow portal
<b>SCRM-2550</b>	Burrow - Custom Supporting Document entries on a product
<b>SCRM-2551</b>	Burrow - Custom Supporting Document entries in maintenance
<b>SCRM-2559</b>	Make initial enquiry lender list mirror lenders applicable for product types
<b>SCRM-2585</b>	Design a better Two Factor Authentication setup page
<b>SCRM-2586</b>	Login with Two Factor Authentication (verify on every login)
<b>SCRM-2589</b>	System Setting to force all users to set up the Two Factor Authentication
<b>SCRM-2591</b>	Basic Two Factor Authentication
<b>SCRM-2666</b>	Clarify Twenty7Tec "username" field
<b>SCRM-2667</b>	Alphabetise System Settings page
<b>SCRM-2671</b>	Remove Check All/Uncheck all options within User Permissions

## Bugs fixed in this release

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

Issue Number	Description
<b>MKV5-6360</b>	Address field mapping additional functionality
<b>MKV5-6382</b>	Automation rule 'working hours' checkbox causing excessive triggers
<b>MKV5-6398</b>	Burrow stage type not updating within portal
<b>MKV5-5211</b>	Mapping for Buy To Let product and Twenty7Tec incorrect
<b>MKV5-5331</b>	Select number of rows re enabled
<b>MKV5-6211</b>	Cancel button for manual quote requires field validation
<b>MKV5-6225</b>	Permission error on HTML document editing
<b>MKV5-6275</b>	Sourcing documents from TriGold showing as being "edited" by another user within the audit trail
<b>MKV5-6322</b>	Failure to assign new participant to correct product
<b>MKV5-6344</b>	When Stage or Status is set to view only access is denied
<b>MKV5-6353</b>	Secondary Source linked Participants failing to add on Insurance products
<b>MKV5-6355</b>	Checkbox field effect failing
<b>MKV5-6377</b>	Missing settings in global settings – <i>Site Specific</i>
<b>MKV5-6384</b>	Editing a previous address failure