



EKeeper Group

CRM Release Note for Version [MKv5 – 7.26.1]



Introduction

These software release notes cover all system modifications for version MKv5 7.26.1 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.

Item Number	Description
SCRM-2258	Allow header search to find companies
SCRM-2533	Burrow leads populate correct fields in eKeeper CRM
SCRM-2634	Auto invite the applicant to the Burrow portal at desired stages
SCRM-2635	New Permission to invite customers to Burrow Portal
SCRM-2673	New 'Review Answers' link within completed Fact Find Notification
SCRM-2700	Exclude applicants without GDPR consent when Bulk Emailing
SCRM-2734	Add applicant names into Burrow Notifications

Bugs fixed in this release

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

Issue Number	Description
MKV5-6453	HTTP Posting failure
MKV5-6402	HTTP Posting failure
MKV5-6403	Tracking Page Speed Issues – <i>Site Specific</i>
MKV5-6408	Protection Product adding failure – <i>Site Specific</i>
MKV5-6436	XPlan integration failure
MKV5-6455	Commission 'Fixed Sum' failing when Payment Order is matched
MKV5-4590	Hyperlink to access Case from Address Book failing
MKV5-4884	'Next Stage Due' edit fails within 'Stage' view
MKV5-4971	Stage dates within Insurance Search View's don't contain expected detail
MKV5-5088	Resolution display issue within file categories
MKV5-5243	Figures not saving in 'Borrower Experience' panel
MKV5-6087	Business Summary failing to filter correctly on Normal Stages
MKV5-6216	<<ItemsNotReceived>> merge field formatting in a single line when used
MKV5-6230	Automation rule reporting field names out of sync
MKV5-6235	Merge Fields for "MortgageUser" failing when used with Protection products
MKV5-6239	'Superseded Date' on consent wordings doesn't allow adjustment
MKV5-6335	<<MortgageUserSignature>> not pulling through break lines
MKV5-6399	Reset portal password does not validate both password fields
MKV5-6414	Report Criteria 'None' option cannot be selected
MKV5-6421	Incorrect assignment of Diary Entries when changing Stage
MKV5-6423	Portal Consent prompt failing when user sets password using <<CustLoginPasswordApp1>> merge field
MKV5-6446	Click to call not working for specific user groups – <i>Site Specific</i>
MKV5-6450	Supporting Document Categories renamed incorrectly
MKV5-6456	Fatal Error on changing User 1 or User 2 – <i>Site Specific</i>