

EKeeper Group

# CRM Release Note for Version [MKv5 – 7.6.0]

Stephen Tinnion

# Introduction

These software release notes cover all system modifications for version MKv5 7.6.0 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
<b>SCRM-1230</b>	Add Credit Check functionality to eKeeper CRM (via Lead Qualification Engine)
<b>SCRM-1267</b>	Handle expired Pre-Approval for Lead Qualification Engine

## Major

Issue Number	Description
<b>SCRM-919</b>	PaymentShield Integration for General Insurance quoting
<b>SCRM-921</b>	Product Panel options for use with PaymentShield
<b>SCRM-922</b>	Apply for a quote options for use with PaymentShield
<b>SCRM-1180</b>	Document Handling for use with PaymentShield
<b>SCRM-1181</b>	Add Branch to User Settings for use with PaymentShield
<b>SCRM-1327</b>	Add AML Search functionality to eKeeper CRM (via Lead Qualification Engine)
<b>SCRM-1328</b>	Add AML Check functionality to eKeeper CRM (via Lead Qualification Engine)
<b>SCRM-1330</b>	Format AML Data into downloadable Document
<b>SCRM-1335</b>	Additional conveyancing merge fields for use with the Optimus integration
<b>SCRM-1337</b>	Conveyancing quote template for use with the Optimus integration
<b>SCRM-1338</b>	Restructured address table within applicant details to create a 'Structured Address'
<b>SCRM-1341</b>	Check for structured address before Credit or AML check
<b>SCRM-1396</b>	Resolve issue with Optimus merge field
<b>SCRM-1397</b>	New 'Ownership' of company permissions: "Can edit commercial customers" renamed "Can edit/view ALL commercial customers (companies)" New permission "Can edit/view ONLY own commercial customers (companies)" New permission "Can view commercial customers (companies) who are not associated with any user"
<b>SCRM-1428</b>	PaymentShield integration security resolution

# Bugs fixed in this release

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

## Critical

Issue Number	Description
<b>MKV5-5155</b>	Branch field in search criteria not hidden by view profile
<b>MKV5-5203</b>	Structured address migration failure

## Major

Issue Number	Description
<b>MKV5-4953</b>	5X: Secondary Source footer buttons failing
<b>MKV5-5221</b>	'Copy from 1st applicant' address leads to issue when quoting for PaymentShield