

EKeeper Group

CRM Release Note for Version [MKv5 – 7.9.2]

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Introduction

These software release notes cover all system modifications for version MKv5 7.9.2 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-666	Additional Ulnsue credentials – Username, Password and Specify credentials fields
SCRM-1002	Updated document downloading of Ulnsure policy documents when using the apply link to alter the policy details
SCRM-1320	Allow creation of new "Non-Product Specific" General Automation Rules for automated reporting
SCRM-1430	Add AML/Credit Check Enquiry/Audit area for easy viewing of the searches completed
SCRM-1575	AML and Credit Check document updates including Name & Dates
SCRM-1580	Retrieve Adepteo recorded calls
SCRM-1590	Allow the reordering of columns within CSV bulk upload template
SCRM-1611	Allow network fee in Optimus integration
SCRM-1655	Ability to reference individual applicants within a Zapier Trigger
SCRM-1666	Ability to link from Fact Find to Customer structured address fields
SCRM-1667	Add merge fields for customer structured address fields

Bugs fixed in this release

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

Critical

Issue Number	Description
MKV5-4974	When importing with Trigold upon selecting the quote the screen goes blank
MKV5-4993	Multiple SMS entries on a product when texts are queued
MKV5-5339	Business Summary not filtering correctly
MKV5-5342	Fields no longer available – <i>Site Specific</i>
MKV5-5367	Validation on Question ID field is only validating numeric fields causing data loss
MKV5-5396	Clawback receipts created even though no receipted fees
MKV5-5403	Automation Rule emails fail to send when the template states a Specific User as the sender
MKV5-5426	Emails failing to send – <i>Site Specific</i>
MKV5-5453	Ability to Export to Spreadsheet from within Reports despite the permission being off

Major

Issue Number	Description
MKV5-5080	Individual user currently unable to view diary entries despite permissions allowing
MKV5-5085	User not recorded on simple tasks audit trail
MKV5-5093	No button to remove payments when using drip payments
MKV5-5196	Fact-find merge-field name not holding – <i>Site Specific</i>
MKV5-5244	Hidden fields on a Fact Find calculator page are failing
MKV5-5314	Field effects failing when using checkbox type questions in Fact Find
MKV5-5336	Attachments failing when using Automation Rule emails or Bulk Emails
MKV5-5365	Field effects failing when answering questions in Fact Find
MKV5-5368	Multiple field effects not functioning correctly within Fact Find
MKV5-5372	Inbound Emails failing – <i>Site Specific</i>
MKV5-5404	Manual Forward of emails failing – <i>Site Specific</i>
MKV5-5409	HTML document templates with images causing fatal error
MKV5-5411	AML check fails without a building number