New features in this release

There are 8 new features that have been released:

Story Number	Feature Description
MKV5-2366	An improved results search page when using the basic search has produced a new hover box for each application icon giving a quick view to the product details

Story Number	Feature Description
MKV5-2534	When creating actions against 'Simple Tasks' there is now a cancel option that will allow you to return to the 'Simple Task' you were creating

Story Number	Feature Description
MKV5-2568	Added a new 'Active' column within the 'Action List' and the ability within each action to 'Activate/Deactivate'

Action List

Home / System Settings / Action List

Sequence	Action Description	Active		Action
5	Mortgage Note	✖		Edit
10	Protection Note	✖		Edit
20	Text Sent	✖		Edit
30	Phone Call Made	✖		Edit
40	Phone Call Received	✔		Edit
50	Fax Sent	✖		Edit
60	Fax Received	✖		Edit

Edit Action

Home / System Settings / List Actions / Edit Action

Action Details

Sequence Number:	5
Description:	Mortgage Note
Active:	☐

Story Number	Feature Description
MKV5-2573	Following the addition of the GDPR consent panel , these fields are now linked to 'Fact Find' questions as "Linked Dropdown" questions

Applicant 2 (Mrtg-83)

Essential Contact	Consent Provided
Essential Contact Letter	
Essential Contact Email	
Essential Contact Telephone	
Essential Contact Text Message	
Marketing Contact	
Marketing Contact Email	
Marketing Contact Letter	
Marketing Contact Telephone	
Marketing Contact Text Message	
3rd-Party Contact	
Consent Wording	
Consent Supplied Method	
Consent Provided By	Other
Consent Provided By Other	

Story Number	Feature Description
MKV5-3019	Restriction of commission enquires by team: • Advisers within a firm can be set so they can see only their own commission • Firm principals or the commission team within a firm can be set to see all commission for that business/firm

Participants

Add Participant ⊕

Type	Name	Company	Due Commission	Total Commission	Contact	Action
The Company	The eKeeper Group ⓘ	eKeeper Group	Proc Fee, Broker Fee	205.87	✉️ 📧 📧	Edit
Advisers	Mortgage Adviser ⓘ	EKeeper Group	Proc Fee, Broker Fee	308.78	✉️ 📧 📧	Edit
The Network	SMD	SMD	Proc Fee	45.35	✉️	Edit
Introducers	Liam Walsh ⓘ	Cherry Orchard	Proc Fee		✉️ 📧	Edit
Bloor Homes Region 1	Ryan Greensmith ⓘ	Blloor Homes			✉️	Edit
Bloor Homes Region 2	Melinda Messanger ⓘ	Blloor Homes			✉️	Edit
Bloor Homes Head Office	John Bloor ⓘ	Blloor Homes			✉️	Edit

Commission Options

Add Fee ⊕

Fee	Amount	Based On		From	Status	Action
⚠️ ⊖ Proc Fee	560.00	0.4	% of the mortgage amount	From the lender/provider	No Lender specified	Details | Delete

Pay To	Based On	Amount	Payment Due Date	Paid Date
SMD	8.10% of the Fee	45.35		
Mortgage Adviser	60.00% of the Fee	308.78		
The eKeeper Group	The Remainder	205.87		

Fee	Amount	Based On	From	Status	Action
Broker Fee	0.00		from the customer	No amount specified	Details | Delete
Total	560.00				

Story Number	Feature Description
MKV5-3108	Within the 'Wealth Desk' (e.g. Pension) there are new drop-down options available Under 'Transactions' the following additional options are added: Regular Contribution - Employer Regular Contribution - Personal Single Contribution - Employer Single Contribution - Personal Annuity Purchase Price Under the 'Outgoing Transactions' the following additional option is added: Tax Free Cash

Edit Transaction

Transaction Details

Transaction Type

Transaction Amount

Transaction Status

Transaction Date

Incoming Transactions
Purchase Price
Annuity Purchase Price
Regular Contribution
Regular Contribution - Employer
Regular Contribution - Personal
Single Contribution
Single Contribution - Employer
Single Contribution - Personal
Transfer In
Outgoing Transactions
Cash Withdrawal
Regular Income
Regular Withdrawal
Single Withdrawal
Transfer Out
Tax Free Cash

Story Number	Feature Description
MKV5-3165	A change to the way that the system handles cancelled insurance products; if the associated commission is not paid, upon saving into a cancellation status the system prompts the user to remove the commission amount. Equally when the commission has been paid then the cancellation process works

Term:

Lead Creation Date   26/06/2018

Sign Up Date

On Risk Date:

This product has been cancelled

Cancellation Reason   Doesn't want to change existing

Cancellation Date   28/09/2018

Cancellation Text   On the insurance side I'm ok with the cover I have and don't want to change it.

Choose a different Task Status to un-cancel this product

Outcome Reason

Outcome Date

Outcome Text

Outcome Reference

Story Number	Feature Description
MKV5-3252	When using the Print Fact-Find function, the page navigates to a Fact-Find Letter Generation page which notifies you of the status of the document generation and gives you the option to download the document There is now a button to navigate back a page

Success - Document generated.   ✕

Factfind Letter Generation

Document Name	Action
MortgageDoc5beebae638511.rtf	Download

Finish   Top ⌃

Story Number	Feature Description
MKV5-3342	The version number shown at the bottom of the DefaultPage.php has been updated to 6.27.0

No Fee Due	6	6
Not Applicable	1	1
Clawed Back	1	1
MKV5-3282	3	3

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