

EKeeper Group

CRM Release Note for Version  
[MKv5 – 6.28.1]

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# Introduction

These software release notes cover all system modifications for version MKv5 6.28.1 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.

# Bugs fixed in this release

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

## Blocker

Issue Number	Description
<b>MKV5-3491</b>	User team permission allowing users to search against other users

## Critical

Issue Number	Description
<b>MKV5-3471</b>	Stage search not holding values; displaying incorrect results
<b>MKV5-3447</b>	Tick list link function returning incorrect search results
<b>MKV5-2658</b>	Letter 'Edit Permission' not working
<b>MKV5-1029</b>	Extend number of applicant merge fields and linked fields within the Fact Find
<b>MKV5-3539</b>	Commissions showing payments not linked to receipts

## Major

<b>Issue Number</b>	<b>Description</b>
<b>MKV5-3477</b>	Bulk SMS - Incorrect Recipients Selected
<b>MKV5-3437</b>	Duplicate diary entries created on stage change
<b>MKV5-3434</b>	Show Products tab not loading within Participants
<b>MKV5-3424</b>	Lender field recalculate multiple popup issue
<b>MKV5-3421</b>	Commissions Filter by team not working as expected
<b>MKV5-3416</b>	Overridden commission due date not saving
<b>MKV5-3401</b>	Missing Frequency option on regular contributions within the Investment Panel
<b>MKV5-3397</b>	Time line record is created for stage when mortgage is updated even if stage hasn't been changed.
<b>MKV5-3319</b>	No product ownership audit history on existing cases
<b>MKV5-2997</b>	Solution builder, pressing finish with no quotes
<b>MKV5-2649</b>	Products are still showing as related against the Mortgage despite being made inactive
<b>MKV5-1675</b>	Trigold Illustration's audit trail not showing V5 conversions, only V3
<b>MKV5-1660</b>	Files attached against applicant not showing within 'Attached Files'
<b>MKV5-3397</b>	Stage history entry is created when the mortgage is updated, but no stage change
<b>MKV5-3687</b>	Users are unable to select dates in the future when using the calendar
<b>MKV5-3682</b>	No TXT button displaying for lenders when number supplied
<b>MKV5-3681</b>	Text function to participants or lender/provider not working

## Minor

Issue Number	Description
<b>MKV5-3472</b>	Certain sites have a custom display issue with their logo
<b>MKV5-3469</b>	Document maintenance header and column mismatch
<b>MKV5-3464</b>	Case not closing on 'Save and Close' when user is on the quotes tab within Solution Builder
<b>MKV5-3461</b>	If diary entries are 3 or more pages, and removing a diary entry that returns the total pages to 2 this causes a fatal error
<b>MKV5-3455</b>	Apostrophes preventing lender/provider help text hover not working
<b>MKV5-3448</b>	Inactive action notes types still an option
<b>MKV5-3427</b>	Bulk SMS message facility 'Done' button returning to the case rather than the search performed
<b>MKV5-3423</b>	Commission total not dynamically updating when moving away from the field
<b>MKV5-3399</b>	Within the Fact Find the applicants details are not aligned correctly
<b>MKV5-3392</b>	Bulk email and letters can be executed when the permissions are off
<b>MKV5-3391</b>	Bulk SMS can be executed when the permissions are off
<b>MKV5-3386</b>	The timeline is displaying incorrect Date/Time, User and Activity
<b>MKV5-3385</b>	When editing a diary entry, it is not saving when the 'Start time' is blank
<b>MKV5-3379</b>	If there are a lot of Participants added, they can disappear beneath the footer bar
<b>MKV5-3373</b>	Produced documents are not available when using the 'Documents from the product'
<b>MKV5-3333</b>	Entering a pre-existing and used merge field when creating a fact-find question, the system informs of this but still creates the question
<b>MKV5-3317</b>	When an Outgoing Email is not set as 1, the email will link is not carried into the mail client
<b>MKV5-3283</b>	Business summary for protection statuses display issue
<b>MKV5-3264</b>	When Solution Builder imports to eKeeper without selecting quotes there are undesired effects
<b>MKV5-3201</b>	Solution Builder apply quote online failure
<b>MKV5-2860</b>	Can "edit own participants" fails when can "edit all participants" is not enabled
<b>MKV5-1593</b>	Within the fact find, the "Show by Previous Question" causes a display error to the data entry box
<b>MKV5-3613</b>	Reviewing sent SMS messages displays the customers name as HTML code rather than the customer name

# New features in this release

This section lists features that have been deployed in this release.

## Twenty7Tec Integration

Issue Number	Description
<b>MKV5-3076</b>	Twenty7Tec Integration
<b>MKV5-3486</b>	The Twenty7Tec integration affecting XPLAN integration
<b>MKV5-3372</b>	Twenty7Tec illustration population and selection
<b>MKV5-3298</b>	Twenty7Tec tidy-up
<b>MKV5-3487</b>	Sourcing System fine tuning following integration

## Critical

Issue Number	Description
<b>MKV5-3212</b>	Transfer loan funding solution (Loan system only)
<b>MKV5-2496</b>	Improvements to email error responses giving server failure details
<b>MKV5-1594</b>	Add Cancellation Reason to insurance search criteria
<b>MKV5-1207</b>	Make 'logged in as' a link to the user profile within the navigation bar
<b>MKV5-3700</b>	Update version to 6.28.1

## Major

<b>Issue Number</b>	<b>Description</b>
<b>MKV5-3105</b>	Add an active indicator for 'Interest Rate Types'
<b>MKV5-3015</b>	Interface for Xplan Insurance
<b>MKV5-2881</b>	Borrower paying fees set to pay before the funds are drawn-down
<b>MKV5-2214</b>	Change 'Send SMS' button to 'Preview SMS'
<b>MKV5-1850</b>	'Branch' field to be added as a searchable field within reports
<b>MKV5-1848</b>	Add 'Lender Reference' as a search field
<b>MKV5-1541</b>	Delete old version 3 page
<b>MKV5-1505</b>	The system location address for Custom Fields is incorrect
<b>MKV5-1504</b>	Fix Breadcrumb for custom fields permissions
<b>MKV5-1503</b>	Fix navigation error when accessing custom fields
<b>MKV5-3327</b>	Improve incorrect login display
<b>MKV5-3299</b>	CSV Import enhancements (avoiding duplicate clients)
<b>MKV5-3244</b>	Add merge fields for Solution Builder fields
<b>MKV5-1851</b>	'Mortgage Lead Provider' field to be added as a searchable field within reports
<b>MKV5-3507</b>	Migration failure on loan system

## Minor

<b>Issue Number</b>	<b>Description</b>
<b>MKV5-3442</b>	Strip comments and redundant code from Fact Find
<b>MKV5-3348</b>	Merge field for primary and secondary valuations (Loan system only)
<b>MKV5-3347</b>	Participants details are missing on Mortgage Source
<b>MKV5-3331</b>	Within the Fact Find the linked fields are not populating the £ symbol
<b>MKV5-3261</b>	Change the category to show whether it was an email, letter or SMS rather than being under one category within Produced Documents
<b>MKV5-3441</b>	Help text icons within the Fact Find providing pop up
<b>MKV5-3364</b>	HTML coding solution to allow font enhancements
<b>MKV5-3303</b>	Attaching an existing document from the product to an email uses the fileserver's randomly generated name rather than the name as it appears against the case
<b>MKV5-3246</b>	Improve "prompt for time" functionality against stage diary actions