

EKeeper Group

CRM Release Note for Version
[MKv5 – 6.31.1]

Stephen Tinnion

Introduction

These software release notes cover all system modifications for version MKv5 6.31.1 of the eKeeper CRM system. This release is an amalgamation of 6.31 and 6.31.1.

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.

Features

Feature Number	Description
MKV5-2782	Adding the ability to delete a Solution Builder quote permanently when no longer required; a user permission is required to enable this

Edit User Group

[Home](#) / [System Settings](#) / [User Group List](#) / Edit User Group

User Group Description:

Quick Search: ×

Maintenance Options

Can delete quotes	<input type="checkbox"/>
Can delete own diary entries	<input checked="" type="checkbox"/>
Can delete any diary entries	<input checked="" type="checkbox"/>
Can delete documents from the Document Library	<input checked="" type="checkbox"/>
Can delete non-editable documents	<input checked="" type="checkbox"/>
Can delete initial enquiries	<input checked="" type="checkbox"/>

Policy Details

Aviva : Aviva Life Insurance+

Provider:

Total Premium (£):

[View](#)

[Apply](#)

[Delete](#)

Cover Details

Benefit	Premium	Sum Assured	Term (Years)
Family Income Benefit	£7.02	£25000	10

Other Quotes

Show Other Quotes

Quote Name	Covers	Total Premium	Sum Assured	Date Quoted	Action
VitalityLife : VitalityLife Essentials Plan	<ul style="list-style-type: none">Level Term Assurance	£10.12	<ul style="list-style-type: none">£120000	2019-03-14 13:21:06	View Proceed Delete

Feature Number	Description
MKV5-3480I	UInsure Integration; further setup details available within the UInsure guide

[Summary](#)
[Timeline](#)
[Quote\(s\)](#)
✖ B&C (BC-319)
✔ Mortgage (Mrtg-382)

GI Details

GI Type: Building & Contents

Applicant(s): John Test:

Associated With Fact Find: You haven't entered any Fact Find details yet

Reference:

Additional Reference:

Tab Text:

Address:

62 Macrae Rd
Pill
Bristol

Postcode:

Policy Details

No Quote Currently Selected

XPlan Illustration(s)
Currently No Illustrations

UInsure Illustration(s)
Currently No Illustrations

Solution Builder Illustration(s)
Show Illustrations:

Feature Number	Description
MKV5-3522	A mergefield validation throughout the system to ensure that if a created mergefiled is duplicated it does not allow creation

NOTIFICATION
The following errors/warnings have occurred:
Merge Name already exists



Feature Number	Description
MKV5-3838	Panels within the product pages have now been made collapsible from within the 'Product Page Layout' screen

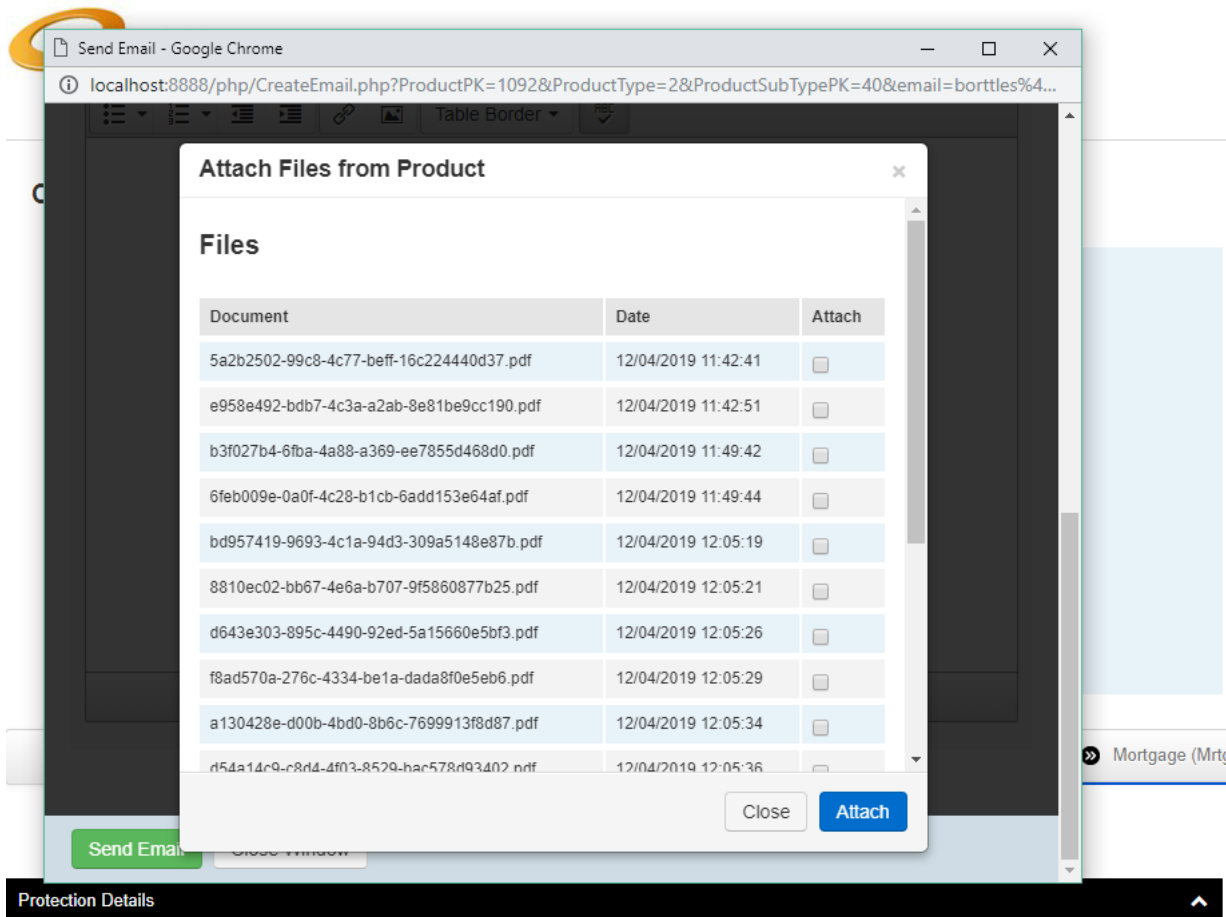
Edit Product Page Layout For Mortgage

Home / System Settings / Product Setup / Edit Product Page Layout

Left Column	Right Column
Mortgage Details 1 <input type="checkbox"/> Collapse Panel	Mortgage Details 2 <input type="checkbox"/> Collapse Panel

Save Cancel Top ^

Feature Number	Description
MKV5-3770	Improved file attachments to emails to ensure scaling is correct



Bugs fixed in this release

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

Blocker

Issue Number	Description
MKV5-3755	Empty search (within header bar) using 'Spy Glass' ignores user view permission and returns all cases within the system

Critical

Issue Number	Description
MKV5-3826	Fatal error when navigating to a commission entry
MKV5-3982	When reporting a search view that includes repayment method, the result is returning 'Array' rather than expected repayment method
MKV5-3994	Applicant portal access revoked, when already enabled, on stage with enabled Client Login ticked on

Major

Issue Number	Description
MKV5-3344	Split logic is incorrect when selecting repayment methods; can now split repayment methods
MKV5-3512	Null or Blank values populating merge fields with 'null' or '0.00' within document templates
MKV5-3597	Next stage due date filter not working when accessing via stage link
MKV5-3769	Illustrations not returning when quoting using Solution Builder
MKV5-3763	Field for secondary source doesn't function correctly – A Client Referral secondary source should auto complete with Customers from the address book
MKV5-3596	Hiding secondary source within the view profile prevents ticklists from working
MKV5-3984	Hiding secondary source within the view profile prevents insurance quotes panel from functioning
MKV5-3990	Fact-Find Setup - Textfield question merge name error

Minor

Issue Number	Description
MKV5-3787	Within the 'Customer Custom Fields' screen there is no 'Cancel' option
MKV5-3806	Avoiding duplicate entries within the 'File Category List'
MKV5-3811	Incorrect merge field validation in fact-find questions
MKV5-3849	Styling/alignment issue of customer portal messages within the mortgage update screen
MKV5-3719	Users are no longer able to dynamically search for a secondary source by typing into the secondary source field