EKeeper Group

CRM Release Note for Version [MKv5 – 6.32.1]

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Introduction

These software release notes cover all system modifications for version MKv5 6.32.1 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.

New features in this release

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

Critical

Issue Number	Description
MKV5-2667	Reset password functionality for system users
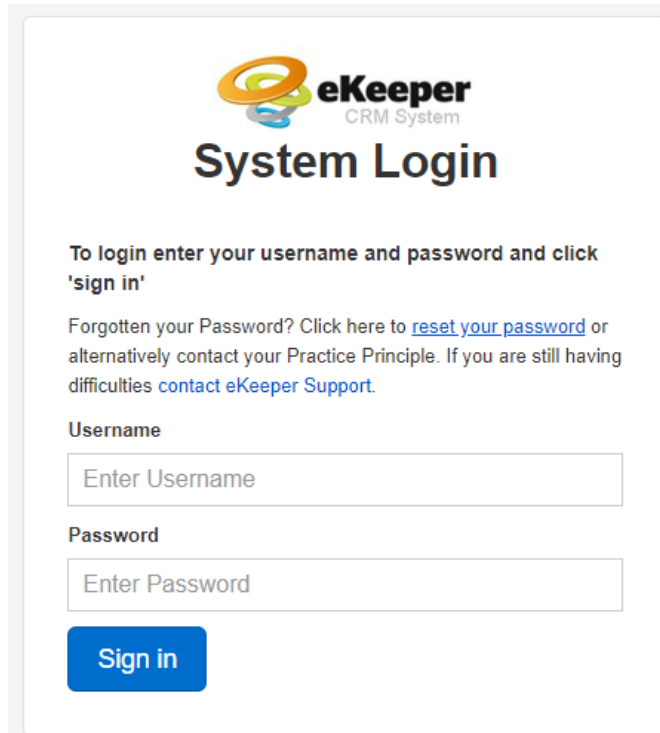
Enable the permission to allow a user to edit their security question within their details page

When a user then forgets their password, they are then able to use the 'reset your password' link from within the login page where they will be asked to answer their security question in order to trigger the reset

Critical

Issue Number	Description
MKV5-3300	CSV import enhancements to handle protection products
MKV5-4229	Limit Uinsure quotes so not to be an option on BTL mortgages
MKV5-3912	Print FF enhancement to only include completed sections

Major

Feature Number	Description
MKV5-3670	The ability to manually add benefit information for protection products
MKV5-3836	Raw emails don't display correctly when sending emails and previewing
MKV5-3873	Resolution of a number of stage driven action problems
MKV5-3875	Search Field 'Lender Proc Fee Amount' removed from the editable search columns
MKV5-3951	Attached file increase in size to 40MB
MKV5-4031	Update to HMRC tax calculations within the applicant profile
MKV5-4142	Inconsistent page layout on when accessing Email Templates

Minor

Feature Number	Description
MKV5-111	700613 days late advisory note when next stage due is blank
MKV5-2449	Options to the 'Retired' employment type field

Bugs fixed in this release

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

Critical

Issue Number	Description
MKV5-3791	SMS not producing against stage – *Site specific*
MKV5-3793	Diary navigation to a case and existing causes display issues – *Site specific*
MKV5-3846	Document portal sync on/off toggle failing
MKV5-3886	Bulk Actions failing
MKV5-3934	System adding unrelated client to portal access on stage change
MKV5-3957	Monthly fees not accepting pence
MKV5-4152	Password Reset merge field not working for portal users
MKV5-4281	Speed and crashing issues – *Site specific*
MKV5-4434	Issue with Twenty7Tec causing fatal error

Major

Issue Number	Description
MKV5-3425	'Total Commission' not displaying within Participants panel
MKV5-3430	Unable to add future dates in the 'Due Date' commission details panel
MKV5-3431	Commission status failing to hold date entries; matching other entry dates
MKV5-3504	Using source to add participants on loan product fails
MKV5-3547	Call button missing from stages
MKV5-3671	Jump to page within the Fact Find is not available
MKV5-3683	Stage created diary entries don't show within the displayed text box
MKV5-3685	Page layout error within Email Templates
MKV5-3805	When reviewing Fact Find answers these are not in any order
MKV5-3827	Initial enquiry panel enabled causes Uinsure integration failure
MKV5-3847	Adding a case note from summary page cannot be added against applicants
MKV5-3867	Intermittent issue when using date filters when reporting
MKV5-3877	Custom Field for Participant merge fields not saving
MKV5-3882	Editing FF subset and using 'Fact Find Subset List' causes 'No fact find version specified' error
MKV5-3884	Unable to assign a diary entry when creating action note – *Site specific*
MKV5-3928	Lender email address merge field mapping from wrong field
MKV5-3937	Fact Find sections not displaying correctly
MKV5-3947	Total Calculation merge field failing within the Fact Find
MKV5-3950	Historic Assureweb quotes not opening on V5 Site – *Site specific*
MKV5-3977	Marking a fee received updates other fees on the case to 'Due on *todays date*'
MKV5-3983	Deleting a lender doesn't delete all records for that lender
MKV5-4026	Search by Post Code not functioning
MKV5-4151	Diary entry priority system colour coded text
MKV5-4227	Email to Lender throws email alignment out

Minor

Issue Number	Description
MKV5-2581	Solution Builder integration is providing limited quote information when imported
MKV5-3537	No mandatory fields within applicant details screen
MKV5-3731	No 'All' option when showing month and week view diaries
MKV5-3741	TXT message symbol appearing when viewing applicant details
MKV5-3782	Diary entry text background is different on Month View
MKV5-3824	Lenders and Users missing from CSV uploads including wrong data
MKV5-3880	Buyer type maintenance option appears both in Product Setup and Customise Your System
MKV5-3881	Incorrect detail within Diary Entry access
MKV5-3992	When accessing a case through search results, and 'Save and Close' your return to the homepage rather than the search results