

EKeeper Group

CRM Release Note for Version
[MKv5 – 6.34.0]

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Introduction

These software release notes cover all system modifications for version MKv5 6.34.0 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
SCRM-23	Allow UInsure quotes to be linked to account held with UInsure
SCRM-78	PDF print Fact Find output option
SCRM-143	Improved error messages when outgoing commission cannot be calculated
SCRM-150	Additional field for 'Policy Type' added to Protection Desk reports criteria
SCRM-575	Additional reporting date criteria when using customer custom fields

Major

Issue Number	Description
SCRM-10	Stage driven document production for protection products
SCRM-24	Unsaved changes within cases saved upon entering Fact Find
SCRM-26	UInsure documents return <i>readable</i> file names
SCRM-28	UInsure fields within 'Application Details' are now linked to the Fact Find
SCRM-34	Disabled auto complete when entering diary dates as this shield's fields
SCRM-37	'Select Multiple' option for 'Entered Stage' when reporting
SCRM-61	New merge fields for protection cover details
SCRM-75	Specific deal term entry when using Twenty7Tec integration
SCRM-139	Chronological status ordering when selecting a status from the dashboard
SCRM-523	Aventria dialog on the initial quote page
SCRM-524	Purpose of Loan mapping when using Aventria integration

Minor

Issue Number	Description
SCRM-57	Restored ability to search by Diary Entry dates
SCRM-146	Fact find text areas accept numbers/dates

Bugs fixed in this release

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

Blocker

Issue Number	Description
SCRM-600	Enter Fact Find button fails when accessing via case summary
SCRM-615	Document producing only in portrait – <i>site specific</i>
SCRM-645	Aventria stage change fails to correctly validate the product

Critical

Issue Number	Description
SCRM-55	Error 404 when navigating to Reports – <i>site specific</i>
SCRM-71	Prerequisites not populating supporting documents/ticklists if mortgage details entered
SCRM-76	Re-associate clawback commissions with products – <i>site specific</i>
SCRM-85	Edit customer permissions not functioning correctly
SCRM-104	Edit product changes product group to 'none selected' thus the product disappears
SCRM-140	Adjusting a saved report search does not allow you to click search – <i>site specific</i>
SCRM-263	Field effects not holding when navigating on the Fact Find – <i>site specific</i>
SCRM-270	"Drip" commissions not functioning correctly- <i>site specific</i>
SCRM-272	Search field functionality failing within header bar
SCRM-478	Commission receipt total adding rather than subtracting any clawbacks
SCRM-577	Clawback commissions not appearing on outgoing commissions reports
SCRM-578	Unable to register clawbacks; un-allocated commission amount error message – <i>site specific</i>
SCRM-581	Permissions not allowing opening of documents
SCRM-582	Month view diary entries only showing one entry per day
SCRM-655	Cases with only a commercial applicant don't display when reporting

Major

Issue Number	Description
SCRM-40	Commissions not functioning correctly- <i>site specific</i>
SCRM-42	Clawbacks are not displaying in the commission's report; only show within the pay participants panel
SCRM-48	Reporting filters not functioning as expected
SCRM-54	Summary for user details dropdown failing – <i>site specific</i>
SCRM-69	Product deletion not deleting commission entries/payments
SCRM-70	Existing emails produced on cases displaying incorrectly – <i>site specific</i>
SCRM-79	Default summary page for diary entries not functioning – <i>site specific</i>
SCRM-80	Early Repayment Charge date missing from product page – <i>site specific</i>

SCRM-83	Diary entry priority colour coding text not functioning – <i>site specific</i>
SCRM-84	Adding a new user with a user ID already in use fails to warn that the ID is already being used
SCRM-100	Print Fact Find when using subsets fails to hide hidden pages
SCRM-103	When saving a Cancellation Reason or Secondary Cancellation Reason this fails to save and deletes/hides
SCRM-105	Stage driven email attached files coding does not mirror an ad-hoc email attachments file name
SCRM-107	When saving report criteria that have simple task filters, these are not holding within the criteria
SCRM-109	Outgoing commissions when filtering by team causes the 'due to be paid' column to display '0.00' – <i>site specific</i>
SCRM-110	Attached files audit history only references one entry
SCRM-111	Ticklist stage prerequisites error when marking as requested and moving stages
SCRM-112	Site display error – <i>site specific</i>
SCRM-135	Reoccurring diary entries cannot be created for 'All Day'
SCRM-136	Produce SMS on all new products button cannot be toggled off once enabled
SCRM-144	Supporting documents issue when using 'Add Another with Custom Text' – <i>site specific</i>
SCRM-271	Xplan error code 500 when application reference is over 20 characters
SCRM-438	Reports function when using entered stage error
SCRM-576	Email templates sending from incorrect user intermittently
SCRM-606	When saving report criteria including custom fields filters, these are not holding within the criteria
SCRM-642	Spelling error within site
SCRM-657	No customers showing within the address book – <i>site specific</i>

Minor

Issue Number	Description
SCRM-73	Styling error on action note when creating diary entries
SCRM-82	Labels for User 3 & 4 update so can be included in reporting
SCRM-99	When uploading a document to supporting documents/ticklists via add another with custom text the close button in the panel fails
SCRM-106	Printable Fact Find export when trying to 'Edit Generated Letter' fails
SCRM-108	Diary Date field shows incorrectly when the case is created with a blank next stage due
SCRM-137	Unable to remove attachments from emails
SCRM-138	Archived status enforcing a lead time; should be able to be left blank
SCRM-182	Formatting/display issue on inbound emails