EKeeper Group

CRM Release Note for Version [MKv5 – 7.5.0]

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Introduction

These software release notes cover all system modifications for version MKv5 7.5.0 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.

<u>Major</u>

Issue Number	Description
SCRM-22	Create login notifications for eKeeper to provide update messages directly to users
SCRM-1102	5X Diary dashboard improvements
SCRM-1446	Enable additional fields for HTTP posting: MortgageAmount PurchasePrice ActualPurchasePrice

Bugs fixed in this release

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

Critical

Issue Number	Description
SCRM-1234	Commission Drip feed payments not calculating the due date using the due date of the first payment when the product is moved on risk
SCRM-1240	Twenty7Tec integration issue where property age is being defaulted to 0 when exporting to Twenty7Tec
SCRM-1243	5X: Copy function in Fact Find pages and sections failing
SCRM-1278	Twenty7Tec integration issue that if no DOB is entered this defaults the DOB on Twenty7Tec to today's date
SCRM-1280	Can add participants to product permission is failing
MKV5-5172	5X: Inbound emails failing to pull from email provider
MKV5-5173	Inbound email body text failing to display

Major

Issue Number	Description
SCRM-1160	Twenty7tec integration not allowing quotes to be selected or applied for
SCRM-1197	5x: Business summary resets after viewing a product
SCRM-1198	Supporting Documents/Ticklists do not update automatically when documents attached
SCRM-1202	Status driven actions fail on the first status
SCRM-1206	Login error prompting user is already logged in even though logged out correctly
SCRM-1245	Unable to utilise Birthday Communications
SCRM-1395	Unable to upload files over 1MB into Attached Files
MKV5-5130	HTTP Posting into Further Details/Custom Fields is failing
MKV5-5183	Saved searches/reports error causes no results
MKV5-5219	Applicant DOB failing when using HTTP posting