EKeeper Group

# CRM Release Note for Version [MKv5 – 7.7.0]

## Stephen Tinnion

# Introduction

These software release notes cover all system modifications for version MKv5 7.7.0 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.

## Blocker

| Issue Number | Description |
|---|---|
| SCRM-1226 | Lead integration adding the ability to import a customer's GDPR consent preferences |
| SCRM-1332 | Time and date stamps when exporting/importing with third party integrations |
| SCRM-1392 | Extended features within the View Profile of the Edit User page - Integrations |
| SCRM-1433 | Record specific Credit Check consent |
| SCRM-1517 | Additional KYC information available within AML report |

## Major

| Issue Number | Description |
|---|---|
| SCRM-1221 | Upgrade Optimus integration |
| SCRM-1222 | Allow Broker Referral Fee override in Optimus Integration |
| SCRM-1375 | Combine the Credit Check and AML options together into one |
| SCRM-1431 | 'Export to Spreadsheet' button removed when not available in Cases search view |
| SCRM-1432 | 'Edit your Details' available within username menu |
| SCRM-1434 | Validate address history before launching credit check |
| SCRM-1436 | Remove ability to change search views or use 'reports' |
| SCRM-1438 | Header images consistent throughout CRM use |
| SCRM-1439 | Permissions for Quotes and Customer tabs |
| SCRM-1442 | Permissions that control the "Add Diary Entry" feature on case notes |
| SCRM-1443 | Cosmetic tweaks to AML/Credit Check |
| SCRM-1444 | Add fields 'Additional Borrowing Amount' and '3rd Year Net Profit' to DQS eligibility check |
| SCRM-1448 | Populate structured address when using the DQS features |

# Bugs fixed in this release

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

## Blocker

| Issue Number | Description |
| --- | --- |
| MKV5-5265 | UInsure embedded sourcing access failing |
| MKV5-5305 | Error message when viewing Email Batch List |
| MKV5-5306 | Bulk update of Customer Consent fails to update all chosen customers |
| MKV5-5315 | When adding customer address this wipes all other pre-entered customer before saving |

## Critical

| Issue Number | Description |
| --- | --- |
| MKV5-5001 | Fact Find linked occupation fields failing to link as expected |
| MKV5-5075 | Adding of Company details when using Bulk Upload to import Protection products |
| MKV5-5076 | Bulk uploading Sum Assured values ignores the decimal place |
| MKV5-5102 | Diary entry permissions failing to restrict access as expected |
| MKV5-5153 | Optimus duplicating quote entries if using a single quote |
| MKV5-5204 | Zapier authentication failing |
| MKV5-5218 | DQS integration returns timeout failure instead of meaningful error message |
| MKV5-5285 | Site specific error 500's |
| MKV5-5286 | eKeeper Lite menu inconsistencies |

## Major

| Issue Number | Description |
| --- | --- |
| MKV5-4950 | No ordering on follow up stages when accessed via Business Summary |
| MKV5-5126 | 'Jump to Fact Find' fails after a subset is made available to the customer |
| MKV5-5133 | Field effects failing for radio group Fact Find questions |
| MKV5-5226 | Pagination not appearing at the bottom of the diary |