

EKeeper Group

CRM Release Note for Version [MKv5 – 7.8.1]

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Introduction

These software release notes cover all system modifications for version MKv5 7.8.1 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.

Major

Issue Number	Description
SCRM-1503	Add 'Follow-Up Date' as search criteria field for protection products
SCRM-1504	Add 'Follow Up Date' to search output for protection products
SCRM-1505	Seamless AML/Credit Check document viewing
SCRM-1509	General PaymentShield integration improvements
SCRM-1511	Add Product Type to commission payment details
SCRM-1552	Add the ability to import a customers GDPR consent preferences via HTTP posting
SCRM-1578	Add applicant Email & Mobile to Zapier options
SCRM-1579	Record Adepteo call generation within eKeeper CRM

Major

Issue Number	Description
SCRM-1553	Update eKeeper logos throughout CRM for consistency
SCRM-1554	Extend the View Profile within the "Edit User" page

Bugs fixed in this release

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

Critical

Issue Number	Description
MKV5-4933	Fatal error when using customer search views
MKV5-5032	"Drip" commission payments remaining in reports if product is deleted
MKV5-5134	Disabled feature prevents the user being unable to see and link documents from the applicant.
MKV5-5231	Bulk SMS communications preview page displays in error
MKV5-5246	Bulk emailing customers with apostrophe's in their name causes entire bulk email to fail

Major

Issue Number	Description
MKV5-4737	Summary for user default reverting back to logged in user when accessing the more diary entries link – <i>Site Specific</i>
MKV5-5009	5X: Case reference link not displaying in diary entries within panel on home
MKV5-5078	Proc fee percentage rounding to two decimal places incorrectly
MKV5-5240	Actions failing to perform on first case stage/status
MKV5-5250	5X: Red error message and dashboard failing to load
MKV5-5251	Export button not showing when using Optimus or PaymentShield only
MKV5-5257	HELO error message causing email sending to fail – <i>Site Specific</i>
MKV5-5261	Incorrect panel displays
MKV5-5281	Specific Merge Fields failure – <i>Site Specific</i>
MKV5-5319	Unsaved changes to customer page are being lost when adding addresses