

EKeeper Group

CRM Release Note for Version
[MKv5 – 6.25.0]

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Introduction

These software release notes cover all system modifications for version MKv5 6.25 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.

Bugs fixed in this release

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

Unable to Save Fact Find

Issue Number	Feature Description
MKV5-3164	Some users experienced an issue where they could not save a fact find for new products. This has been corrected.

Record Commission Receipt with Invalid Date

Issue Number	Feature Description
MKV5-345	The system now validates the date format is correct before saving the entry.

Lending - New Participant Against Valuation

Issue Number	Feature Description
MKV5-1529	Correct an issue where you could not select an existing participant against a newly entered valuation report against the principal security.

Fact Find - 'Options can be driven by another question'

Issue Number	Feature Description
MKV5-1588	We have fixed the issue stopping question options being driven by another question.

Fact Find - Field Affects

Issue Number	Feature Description
MKV5-1701	When using the 'Hide the following question only', The affected question is hidden until a value is typed within the text field.

Applicant Occupation Field

Issue Number	Feature Description
MKV5-1897	The system now displays the text 'No Records' where an entry cannot be found.

Custom Fields - Cosmetic

Issue Number	Feature Description
MKV5-1974	The button to create a new entry has been correctly named to "New"

Blank Row in Commission Screen

Issue Number	Feature Description
MKV5-2298	The system has been updated to display the text 'No [Adviser]/[Administrator] Selected' instead of a blank row in the commission screen under the 'Adviser' column

Email Template -Document Library Attachments

Issue Number	Feature Description
MKV5-2386	A bug has been fixed where an email template setup to include a document library entry as an attachment, is missing when sending the email template.

Search Views - Cosmetics

Issue Number	Feature Description
MKV5-2392 MKV5-2906	Advisor column refers to 'Advisor' instead of 'User' in reports. Incoming commission amounts pull through into reports.

New Lead Stage Generated Emails Not Sending

Issue Number	Feature Description
MKV5-2443	The system now allows stage generated Emails to send on new lead stage.

Insurances - Follow-up Date

Issue Number	Feature Description
MKV5-2507	Date is now populated when changing product into 'Follow Up Stage'

Solution Builder - Cosmetic

Issue Number	Feature Description
MKV5-2544	iFrame and modal size change to allow full content display

Solution Builder - Cosmetic

Issue Number	Feature Description
MKV5-2546	System now generates a Cancel Confirmation

Stage Generated Emails Prevents Attaching Case Documents

Issue Number	Feature Description
MKV5-2560	This system now allows attached case documents to stage generated emails.

Deleted Product with Commission - Fatal Error

Issue Number	Feature Description
MKV5-2588	The system now allows you to delete products with commissions. Any existing commission records linked to the product will also be deleted.

Cannot Save Simple Task Statuses

Issue Number	Feature Description
MKV5-2592	The system now allows simple task statuses to save correctly.

Legacy Search View - Cosmetic

Issue Number	Feature Description
MKV5-2602	Term fields now display the product description.

Lending - Incorrect Redemption Date

Issue Number	Feature Description
MKV5-2639	Redemption date has been corrected, using the loan term + first draw-down date.

New Email Template

Issue Number	Feature Description
MKV5-2702	The system now allows new email templates to open the Document Library selection screen.

Fact Find - Linked Drop Down

Issue Number	Feature Description
MKV5-2722	Applicants' Expected Retirement Age now contain the correct values.

Automation Rules

Issue Number	Feature Description
MKV5-2747	The system caused Automation Rules to stop working when a new product was added. This has been fixed.

Stage Trigger for Customer Portal Activation

Issue Number	Feature Description
MKV5-2773	Some users found customer portal user activation at certain stages not triggering, this has been fixed.

Solution Builder - Session ID

Issue Number	Feature Description
MKV5-2783	The system now allows a new Session ID issue for each instance.

Lending Merge Field "PrinSecAddressAll"

Issue Number	Feature Description
MKV5-2804	The system now correctly outputs all the principle security addresses on 1 line each over multiple lines.

Forwarding Email Loses Attachments

Issue Number	Feature Description
MKV5-2818	The system now ensures the email arrives with the attachment(s).

Duplicating Tasks

Issue Number	Feature Description
MKV5-2819	Some user experienced that a certain task duplicates on some cases. This has been corrected.

Lending Fees – Waive option

Issue Number	Feature Description
MKV5-2835	Users now have the option to waive an individual fee within the 'Record Payment' screen.

Total Initial Advance Field Not Exporting To Excel

Issue Number	Feature Description
MKV5-2848	The system now exports the Total initial advance field.

Fact Find – Applicant Linked Fields

Issue Number	Feature Description
MKV5-2917	The fact find will now create the applicants on the case.

Product Fees - Broken Merge Fields

Issue Number	Feature Description
MKV5-2940	The system now correctly enters fees against a product into system templates.

Supporting Documents for Each Applicant

Issue Number	Feature Description
MKV5-2981	The system now looks to generate entries for applicants that are ticked on the product.

Duplicated Commission Entries

Issue Number	Feature Description
MKV5-2987	Some products would create duplicate commission entries for the same participant. This has been fixed.

Participant Commission Due Date

Issue Number	Feature Description
MKV5-2996	The system has been changed to now populate a due date for participant commission records.

Secondary Source

Issue Number	Feature Description
MKV5-3001	Where a secondary source has been setup as 'client referral', the system will now search the address book for the source.

Application Reference Link

Issue Number	Feature Description
MKV5-3040	When viewing the case summary, the application reference is now a clickable link.

Error when Importing from Trigold

Issue Number	Feature Description
MKV5-3042	Some PCs prevent the required component needed to bring back documents into the system. We have made changes to help here, but for some PCs we need to follow the following Help-Guide steps .

GDPR Right of Access

Issue Number	Feature Description
MKV5-3050	The system no longer displays deleted cases/product on exported documents.

Application Details Panel

Issue Number	Feature Description
MKV5-3063	The system now saves when adding a client referral source, which has a secondary source.

Stage Generated Emails

Issue Number	Feature Description
MKV5-3111	We have fixed the issue where stage generated emails were not sending to the second applicant on a product.

Fact Find – Deleted Field Affects

Issue Number	Feature Description
MKV5-3118	The system no longer remembers deleted fields affects against previously affected questions.

Cannot Export to Trigold and Xplan

Issue Number	Feature Description
MKV5-3126	We have corrected the issue where some users could not export to Trigold or Xplan due to the pop-up window being blocked.