

Ekeeper Group

CRM Release Note for Version
[MKv5 – 6.14.0]
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Introduction

These software release notes cover all system modifications for version MKv5 6.14.0 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 Included in this Release

This section lists the New Features that are included in this release.

Copy Product Function

Issue Number	Feature Description
MKV5-1903	Added Copy Product option when editing a product. This will allow the user to create a duplicate of the current product and to optionally specify the attributes of the product to copy such as applicable stages, page layout etc.

Portal Document Synchronisation Function

Issue Number	Feature Description
MKV5-2046	In our version 3 product users had the ability to sync produced case documents with the portal system. This update adds this functionality to the version 5 portal system.

Include Version 3 Search Views To Version 5 Release

Issue Number	Feature Description
MKV5-1842	Our older version 3 product had a number of search views accessible via the advanced search. These have now been included in our version 5 product. Although search views are now user configurable we have added these to promote continuity for customer systems that are converted to version 5.



Add Related Products Panel to Insurance Products

Issue Number	Feature Description
MKV5-1963	Some of our early converted customers have helped us identify that the addition of the 'Related Products Panel', which previously only appeared on mortgage products, would make it easier to navigate back to the related mortgage product. This fix has been implemented to add the panel to insurance products.

Retirement age maximum too low

Issue Number	Feature Description
MKV5-2068	This fix increases the retirement age upper limit for applicants to 100 years of age.

Bugs fixed in this release

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

Attachments not appearing against sent email preview (document history)

Issue Number	Feature Description
MKV5-1630	An issue was identified where attachments against previously sent emails would not display when clicking into the email within the document history. This fix displays the attachments and makes them available.

Diary entry type refreshing when saving a diary entry window

Issue Number	Feature Description
MKV5-1876	After filtering the homepage diary entries by a particular type, if a user edits a diary entry and then closes the diary entry edit window, this would revert the filter back to 'All types'. This entry fixes this issue.



Paid date not populating against paid participants on case

Issue Number	Feature Description
MKV5-2020	Fixes an issue that prevented the paid date from displaying in the commissions options panel, against participants who had been paid.

Lenders - ' symbol causes lender drop down box to error

Issue Number	Feature Description
MKV5-2027	Fixes an issue that prevented a user from creating a lender in the addressbook whos descriptive name included an apostrophe.



Future Feature changes and Additions

This section lists a number of existing feature improvements and new features being added to the system in a future release.

- [MKV5-1528] - Request to add Case Reference lock permission
- [MKV5-2091] - Add CSV Upload functionality
- [MKV5-1732] - Add "All Participants" field to custom search views
- [MKV5-2048] - Add ability to change the search view displayed when clicking into a stage at the product group level.
- [MKV5-2052] - Improvements to copy product functionality
- [MKV5-656] - Add bulk email campaign functionality
- [MKV5-1385] - Move the "Get Help" link to the top navigation bar
- [MKV5-2062] - Improvements to Complementary Products

Known Issues

This section lists any known issues that we are currently working on as reported in the current release of the system.

- [MKV5-1655] - Existing saved searches not appearing for some user systems
- [MKV5-1886] - Errors where the user's browser loads parts of the system from their machine's memory, instead of loading new data
- [MKV5-2040] - Search view containing blank or incorrect column headings
- [MKV5-2067] - Some users experiencing an error message in Default Associated Users panel when editing a user's profile.
- [MKV5-2077] - Some users experiencing an error message when attempting to create a new email template
- [MKV5-2089] - Some information not displaying on payment run screen
- [MKV5-2090] - Unable to link existing applicant attachments to supporting documents entries
- [MKV5-2082] - Lender column not displaying data on Business Summary search view