Ekeeper Group

CRM Release Note for Version [MKv5 – 6.15.0]
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Introduction

These software release notes cover all system modifications for version MKv5 6.15.0 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.

Making Mobile numbers searchable in the address book against participants

Issue Number	Feature Description
MKV5-1317	When searching the address book for a particular participant (Address book > Participants), users are now able to search by the participant's mobile number.

Add ability to send emails in Bulk to search results

Issue Number	Feature Description
MKV5-656	We have now added bulk email functionality to the eKeeper system. To access this head to Reports > Run a search, and then click the relevant button to send a bulk email to applicants in the search results. **Note:** You cannot bulk email when searching by cases, so you need to search by product and also ensure you are not using the 'cases' search view.

Changed the 'Get Help' link to be more accessible

Issue Number	Feature Description
MKV5-1199	The help link has now been moved to the top navigation bar and is visible on all pages within the eKeeper system. This has also now been redirected to our new knowledge base for the current version of the system. **Permission Required** - Show the Get Help link on the front page

Added Customer Search View capability for product groups

Issue Number	Feature Description
MKV5-2048	Users can now configure a set of information they wish to be displayed when changing the Display on the home page to a product group e.g.

| | Residential Mortgages as opposed to a sub-product e.g. BTL Remortgage. |

Bugs fixed in this release

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

Lender column in search results displaying incorrectly

Issue Number	Feature Description
MKV5-394	Search views that were previously configured to display the Lender field information was displaying as "Mortgage lead Provider". This has now been correctly updated to read "Lender".

V5 is missing the bulk email functionality

Issue Number	Feature Description
MKV5-656	Users can now access the bulk email facility when performing searches on the reports page. Note: - Bulk emailing is not currently available against customer and case search options a user must be searching via a product type - The bulk email button appears on the search results page only when _not_ displaying the results using the 'cases' search view.

Automation Rules causing a Fatal error message

Issue Number	Feature Description
MKV5-1296	When running automation rules the system would produce a Fatal error message rather than the success message as expected. This has now been updated to display the success message or a failure message that better describes what has happened.

Unable to attach files to the Document library.

Issue Number	Feature Description
MKV5-1310	Fixed an issue that prevented users from creating new document library entries in System Settings > Document Library.

Prevent users from adding inactive participants to products

Issue Number	Feature Description
MKV5-1313	An issue was identified that allowed users to add inactive participants to products. This is no longer possible.

Unable to export diary entries to excel

Issue Number	Feature Description
MKV5-1342	Diary entries can now be exported when changing the calendar view (on the homepage) to 'List view' and clicking 'Send To Excel' button. This button requires a user permission to work and will not appear by default.

Unable to add image to email signature

Issue Number	Feature Description
MKV5-1458	Fixes an issue where users were unable to succesfully insert images into their email signatures from the document library. Note that a file must be uploaded before it can be used as an image in an email signature. ● Document library can be found via system settings (user permission required) ● Email signatures can be found via system settings > users > edit

Fatal error against Default Associated Users

Issue Number	Feature Description
MKV5-2067	Fixes a fatal error message which that was appearing for some users in the associated users panel, when editing a user.

Error 500 when user accesses email templates

Issue Number	Feature Description
MKV5-2077	Fixes an issue where some users could not create or edit email templates (System Settings > Email Templates > New/Edit).

Unable to link existing applicant attachments to supporting documents entries

Issue Number	Feature Description
MKV5-2090	Fixes an issue that prevented the linking of files uploading against an applicant to the supporting documents (ticklist) panel entries e.g. Name ID

Unable insert embedded images into email templates

Issue Number	Feature Description
MKV5-2102	Fixes an issue that prevented document library embeddable images from being inserted into email templates. A black box would appear with a white cross instead of the image. Users are now able to insert these images successfully. *Note: If you still experience issues you may need to upload the image to the document library once more.*

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.

- [MKV5-1585] - Add Stage Type functionality to Insurance Special Status
- [MKV5-1790] - Add validation to SMS on Case page
- [MKV5-1902] - Add ability to move product to a different case
- [MKV5-2180] - Change Case Browser Tab Title
- [MKV5-1950] - Add option to only convert mortgages in specific stages
- [MKV5-1955] - Conversion: Mortgages & Associated Products performance upgrade

Known Issues

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

- [MKV5-2062] - Complimentary product relationships displaying the incorrect way around
- [MKV5-2144] - Some users experiencing Fatal error when using the basic search box
- [MKV5-1533] - Error message when performing a search using 'Entered Stage' criteria
- [MKV5-1615] - Fact Find - 'Set Prerequisites' - Superseded message
- [MKV5-1672] - Two submit buttons appearing when moving insurance products between statuses
- [MKV5-1698] - Remove ability to set a field effect against the question where a user is setting the field effect
- [MKV5-1792] - Default advisor and administrator checkboxes to on within the user setup page
- [MKV5-1796] - "No Files requested" message when producing letters against a lender
- [MKV5-1873] - Delete product button incorrectly appearing in the timeline option against a case
- [MKV5-1886] - Browser caching issues causing multiple problems for some users
- [MKV5-1937] - Fatal error on "Entered Stage" report
- [MKV5-1938] - Unable to add Secondary Cancellation Reason (or Outcome Reasons)
- [MKV5-1971] - Reference number appearing for *Applicant TPD* instead of the correct option value
- [MKV5-1994] - Security improvement for fact-find merge field prefix
- [MKV5-2019] - Unable to update participant type via address book
- [MKV5-2055] - Some reports not producing results as expected
- [MKV5-2089] - Some information not displaying on payment run screen
- [MKV5-2103] - Some symbols cause 'Edit Product' function not to save
- [MKV5-2104] - Participant Security Questions are always mandatory

- [MKV5-2117] - Files attached to emails using 'Attach files from product' are not arriving with recipient
- [MKV5-2121] - Reports - Selecting lender criteria returns no results
- [MKV5-2129] - Unable to add penny values to valuation, mortgage amount and existing loan fields
- [MKV5-2130] - eKeeper logo scaling is inconsistent across the system
- [MKV5-2197] - Creating a new password functionality not accepting # symbol
- [MKV5-2209] - Search results returning a company as an applicant
- [MKV5-2210] - Display issue with protection reports criteria page