Ekeeper Group

CRM Release Note for Version [MKv5 – 6.19.0]

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Introduction

These software release notes cover all system modifications for version MKv5 6.19.0 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.

Added collapse by default setting for attached files

Issue Number	Feature Description
MKV5-2358	Users can now request to change whether the attached file categories are collapsed by default within the attached files panel on the case.

Bugs fixed in this release

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

Output of some search view fields display as numbers instead of the appropriate value

Issue Number	Feature Description
MKV5-2274	Some users experienced a display issue when using custom search views. This meant that the search results would sometime display numbers rather than the appropriate value for that particular field. All custom search views now output the correct values when using them to display search results.

Inactive simple tasks appearing against newly created products

Issue Number	Feature Description
MKV5-2309	When making a simple task inactive, the task was previously appearing on newly created products. Inactive simple tasks now appear on existing products, if used, and newly created products will no longer display them.

New email templates defaulting recipients as all companies

Issue Number	Feature Description
MKV5-2330	New email templates will no longer default the recipient as *all companies*, this has now been changed to default to *all applicants* instead.

Unable to link a fact-find question to a field in the system

Issue Number	Feature Description
MKV5-2365	When creating or editing a fact-find question it is now possible to save it as a linked question to another field elsewhere in the system.

Missing dropdown options when trying to copy a set of fact-find answers to a new product

Issue Number	Feature Description
MKV5-2407	When entering the fact-find on a new product for the first time, the system now displays a list of existing fact-finds as options correctly in the **copy an existing fact-find** dropdown field.

Unable to enable a fact-find subset in the portal system

Issue Number	Feature Description
MKV5-2410	Some conditions were preventing users from submitting fact-finds to the portal system. The system would then open the print fact-find page inexplicably. This has now been resolved so that user can submit the fact-find to the portal and the print fact-find functionality does not appear.

Print fact find failing the first time it is used

Issue Number	Feature Description
MKV5-2429	Fixed an issue that caused the print fact-find mechanism to fail the first time a user accesses it.

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.

Known Issues

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

- [MKV5-854] - Triggered Diary Entries and Diary Automation Rules not functioning correctly
- [MKV5-1028] - Document size warning Incorrectly displaying when accessing the document template list (system settings)
- [MKV5-1496] - Supporting document phrases not working for some users
- [MKV5-1588] - Fact Find - 'Options can be driven by another question' not working as expected
- [MKV5-1614] - Basic quick search not functioning
- [MKV5-1655] - Saved Searches not functioning as expected
- [MKV5-1754] - HTML tags displaying instead of formatted content in some areas
- [MKV5-1770] - Commercial customer display issues
- [MKV5-1883] - Unlicensed users are unable to allocate licenses even if they have the permission.
- [MKV5-1885] - Product expiry searching functionality in follow-up stages is currently missing
- [MKV5-2030] - Triggered diary entries not prompting user upon status change
- [MKV5-2233] - Employed field completely disables Occupation when trying to change back from certain status
- [MKV5-2236] - Action History Character number Issue
- [MKV5-2244] - Policy type duplicated in the product view profile
- [MKV5-2263] - Issues sending emails to Multiple Applicants
- [MKV5-2264] - Numbers exporting to excel instead of values
- [MKV5-2294] - Unable to select multiple custom field options in reports
- [MKV5-2335] - Product reference missing from payment run statement
- [MKV5-2350] - Tab Text Title Missing and missing permission
- [MKV5-2361] - New Lead - Notification - 'Against' column disappears when selecting a user
- [MKV5-2379] - Born 'Between' Date range only looks at people born within the specific date range rather than any year between the date range
- [MKV5-2395] - White screen displaying when producing a spreadsheet document
- [MKV5-2428] - Portal update user password issues

- [MKV5-2432] - Linking fact-find answer set to another product after unlinking existing product causes applicants to disappear

New features and improvements in progress

- [MKV5-1620] - Fact Find - Create Questions does not have a cancel button
- [MKV5-1857] - Section Tag implementation for Multi Product documents
- [MKV5-1858] - Ability to hide Fact Find repeating pages, sections and questions
- [MKV5-1949] - Search Views - Add Simple Tasks fields to legacy Search Views
- [MKV5-2091] - Add CSV Upload functionality to V5
- [MKV5-2211] - Incorrect Product Applicants and Companies Logic
- [MKV5-2246] - Recreate Case Tracking Page
- [MKV5-2248] - Additional Commercial Mortgage Product Detail Fields
- [MKV5-2250] - Show "inactive" fields that contain data on historical/existing products
- [MKV5-2278] - Additional Loan Product Search View Fields
- [MKV5-2296] - Improve custom field remove process on reports
- [MKV5-2317] - Improve commission visibility for 'all' commissionable products against cases
- [MKV5-2338] - Solution Builder Integration
- [MKV5-2433] - Conversion - Create Portal Fact Find Subset
- [MKV5-2434] - Develop REST interface
- [MKV5-1732] - Add "All Participants" field as a search view field to replicate the V3 functionality.
- [MKV5-2413] - Add "Create letter on all new cases" functionality
- [MKV5-2436] - Update print fact-find to allow for repeating fact-find pages
- [MKV5-2295] - Add ability to include the product type in custom search views