

Ekeeper Group

CRM Release Note for Version
[MKv5 – 6.21.0]
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Introduction

These software release notes cover all system modifications for version MKv5 6.21.0 of the eKeeper CRM system.

The release notes list the new features, 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.

Bring back the case tracking page

Issue Number	Feature Description
MKV5-2246	<p>This update brings back a highly requested feature from our earlier version.</p> <p>Users can now enable and access the case tracking page (now known as the 'product tracking page') .</p> <p>This page provides an at-a-glance view of the stage listings and each of the cases due soonest along with some helpful status information regarding the products listed.</p>

Preparing for the solution builder integration

Issue Number	Feature Description
MKV5-2338	<p>We have been working on an integration with life sourcing tool <i>solution builder</i>, where you can quote for life, income protection, family income benefit and more.</p> <p>This update contains some behind the scenes changes in preparation for the go live date for the integration. A future update will make the integration live and users will be able to utilise it from then.</p>

Added JavaScript Upload feature for the fact-find

Issue Number	Feature Description
MKV5-2530	<p>We've added a feature that was present in our older version. You can now upload custom JavaScript files to the fact-find. These will be executed (post security check) upon entering each fact-find page.</p>

Bugs fixed in this release

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

Document warning displaying against HTML documents even through they were accessible

Issue Number	Feature Description
MKV5-1028	We've fixed an issue that meant that HTML document template would <i>always</i> display the yellow warning triangle indicating the file was inaccessible, even though the file was accessible. Now the triangle will only appear if the file is physically inaccessible.

Deleted prerequisite rules still asking to be fulfilled

Issue Number	Feature Description
MKV5-1513	When deleting a prerequisite for a stage relating to simple tasks the system was still trying to force users to complete the prerequisites before moving on. We've fixed this so that if a user requests to delete a prerequisite, the process checking for the prerequisite being fulfilled is also deleted and users will no longer be prompted to complete them.

Product specific merge-fields not working as expected

Issue Number	Feature Description
MKV5-2310	This fixes an issue that meant if you were producing a letter on a product, if that letter does not include product specific merge fields for the product it was produced from, then the applicant generic merge fields would not work.

Case reference number not generating on new cases

Issue Number	Feature Description
MKV5-2388	This fixes an issue that meant new cases were not obtaining reference numbers and would display 'not specified' at the top of the case.

White screen displaying when producing a spreadsheet document

Issue Number	Feature Description
MKV5-2395	Some users were experiencing a white screen when producing a spreadsheet document. This has been fixed so that spreadsheets will now produce as expected.

User roles not populating onto new insurance products

Issue Number	Feature Description
MKV5-2464	If a user has a user role set against them, for example Adviser, Administrator etc. Then when that user creates a new insurance product the system was not adding them to the product as the adviser, administrator etc. This has now been fixed so that newly created insurance products

Selecting customer custom fields as criteria on reports causes an error

Issue Number	Feature Description
MKV5-2531	If you choose a customer custom field option as the criterion for your report, the system was throwing an error. We've fixed this, no more errors here!

Initial Enquiry Statuses - Missing mouse cursor on hover

Issue Number	Feature Description
MKV5-2643	Fixes an issue that caused the mouse to disappear when hovering over the edit link in System Settings > Initial Enquiry Statuses

Enhancements we're working on

Here you can see a list of some features and improvements we're working on at the moment.

- [MKV5-2508] - Add the new "all participant" search view field to search view from conversion
- [MKV5-2613] - Create 3rd Party Interfaces maintenance process
- [MKV5-2615] - Create Consent Wording maintenance process
- [MKV5-2616] - Add consent recording panel to customers (GDPR)
- [MKV5-2617] - Add consent recording panel to participants (GDPR)
- [MKV5-2618] - Display customer consent status on the applicant panel(s) (GDPR)
- [MKV5-2619] - Warn on Trigold interface if the customer does not consent to Trigold (GDPR)
- [MKV5-2620] - Display customer consent warnings when producing individual documents (GDPR)
- [MKV5-2621] - Display customer consent indicators for individual emails (GDPR)
- [MKV5-2622] - Display customer consent indicators for individual text messages (GDPR)
- [MKV5-2660] - New Average Monthly Interest Calculator
- [MKV5-2690] - GDPR Modify Automation Rules to only email or text recipients who consent
- [MKV5-2735] - GDPR - Customer / Participant Consent panel issues

Other things we're working on

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

- [MKV5-2216] - Fact-find: Linked fields not populating with dropdown options
- [MKV5-2289] - Panel Refresh issue (action notes not visible)
- [MKV5-2294] - Unable to select multiple custom field options in reports
- [MKV5-2307] - Incorrect advisor displaying on the product
- [MKV5-2329] - Unable to attach new client to case after finding an existing one
- [MKV5-2432] - Linking fact-find answer set to another product after unlinking existing product causes applicants to disappear
- [MKV5-2586] - Paying off commission on insurances are not updating task status to paid
- [MKV5-2629] - Emails: Failing to send for some users
- [MKV5-2661] - Unable to create New Cases
- [MKV5-2678] - Further details panel against insurance products incorrectly displaying fact-find info
- [MKV5-2683] - Case Management – No default case reference on new case creation
- [MKV5-2716] - Emails - Unable add ad-hoc attachments to stage generated email template
- [MKV5-2724] - Excel export not consistent with values/totals in commissions report
- [MKV5-2725] - Search Views for Fact Find Questions
- [MKV5-2726] - Fatal error on advanced search using Property Address
- [MKV5-2742] - Supporting document maintenance not matching product page

- [MKV5-2748] - Incorrect advisers displaying accounts commission report
- [MKV5-2767] - Fact-Find - Calculator Pages unable to link question