

Ekeeper Group

CRM Release Note for Version
[MKv5 – 6.23.0]
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Introduction

These software release notes cover all system modifications for version MKv5 6.23 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.

Add HTTP posting API

Issue Number	Feature Description
MKV5-1548	We now have a HTTP posting API for the eKeeper CRM. This enables the posting of leads from a webform (additional purchase necessary)

Add expiry date functionality to supporting documents

Issue Number	Feature Description
MKV5-2476	The supporting document panel now has the option to display an expiry column. This could be used to record expiry dates on passports etc.

Add GDPR search criteria to applicant search criteria

Issue Number	Feature Description
MKV5-2755	We have now added the ability to perform a search against customers to find customers who have provided particular levels of consent.

Add ability to bulk update GDPR fields

Issue Number	Feature Description
MKV5-2764	We have now added a bulk update feature for GDPR fields. You can access this feature by performing a search against customers, ensuring that you have any search view besides the 'cases' view selected and then by clicking the bulk action button on the navigation bar.

Add ability to restrict diary entries to users within a team

Issue Number	Feature Description
MKV5-2847	Diary entries can now be created so that they can only be seen by users within the same team. Additionally it is now possible to restrict users so that they cannot create a diary entry against someone who is not in their team.

Add "Create letter on all new cases" functionality

Issue Number	Feature Description
MKV5-2413	Users can now configure a letter in the system so that it will produce when the case saves for the first time.

Add bulk update functionality and allow bulk deletion

Issue Number	Feature Description
MKV5-2461	The bulk update feature (accessible via reports > search), now allows a user to bulk delete cases, products and applicants. <i>Note: This requires the 'Can do Bulk Update from search results' permission to be turned on before this feature can be used</i>

Add 'choose fact-find pages' to copy fact-find functionality

Issue Number	Feature Description
MKV5-2567	When accessing a new product on the same case as an existing product, if a user chooses the enter the fact-find for the first time on the new product, the system presents a set of options to copy existing fact-find answers from the existing product. The system now allows a user to choose which pages are copied when the user first enters the fact-find. <i>Note: you need to configure your fact-find to allow pages to be copied by default or not (System settings > Fact-find Structure(s) > Edit Structure > Edit)</i>

Display stages for ALL active products on the homepage

Issue Number	Feature Description
MKV5-2567	When selecting the 'All' option under the display dropdown field on the homepage, the system would previously only display stages for mortgages. Now the system displays mortgage <i>and</i> insurance/protection/GI based stages. <i>Tip: If you want refine the list of stages simply select the appropriate product in the display dropdown.</i>

Bugs fixed in this release

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

Show attached files with missing file categories

Issue Number	Feature Description
MKV5-2474	Fixes a bug that would prevent the system from displaying file attachments if they were associated with a file category that had been deleted by a user. Now if a user attempts to delete a file category that is in use, the system will prompt the user to select a new category for the files that are associated with the category that is to be deleted.

Diary entry actions against Mortgage stages not working

Issue Number	Feature Description
MKV5-1229	Fixes an issue that meant if the CRM has been configured to set a diary action at a particular stage, then this diary action would not appear on the summary page when changing to the relevant stage.

Changing Product Type not updating commission records

Issue Number	Feature Description
MKV5-1268	Fixes an issue that occurred when a user changes a product to a different type. If the product type was changed then the commission records would not update, this was causing some products to crash when users entered them.

Display 'Custom Fields' panel when creating a participant

Issue Number	Feature Description
MKV5-1351	The 'custom fields panel now displays when a user creates a new participant

Missing clawback column in incoming commissions reports

Issue Number	Feature Description
MKV5-1735	Fixed an issue which was preventing the 'clawback' column from displaying on the incoming commission reporting screen.

Add skip and cancellation option when producing stage generated emails

Issue Number	Feature Description
MKV5-2240	Users can now skip sending a stage generated email after previewing it or cancel sending any emails at a particular stage.

Unable to send emails to multiple applicants

Issue Number	Feature Description
MKV5-2263	Fixes an issue that prevented some users from sending emails to more than one applicant at once. This issue meant that only the last applicant selected would receive the email even though the email appeared to send.

Numbers exporting to excel instead of values

Issue Number	Feature Description
MKV5-2264	Fixes an issue that meant exported reports were, in some scenarios, exporting numbers instead of values.

Simultaneous percentage calculation of fees

Issue Number	Feature Description
MKV5-2385	Fixes an issue that caused the proc fee to recalculate if the user changes another fee that is set to be calculated from the loan amount.

Supporting documents not updating when changing the lender

Issue Number	Feature Description
MKV5-2567	When a user changes the lender on a product, the system was previously ignoring the <i>lender product</i> as defined by the user (via address book > lenders). This meant that the supporting document panel would not update with the correct set of required documents as required by the newly selected lender. This has now been fixed so that if a user changes the lender on a product, then the supporting document panel will update appropriately.

Add 'choose fact-find pages' to copy fact-find functionality

Issue Number	Feature Description
MKV5-2567	When a user changes the lender on a product, the system was previously ignoring the <i>lender product</i> as defined by the user (via address book > lenders). This meant that the supporting document panel would not update with the correct set of required documents as required by the newly selected lender. This has now been fixed so that if a user changes the lender on a product, then the supporting document panel will update appropriately.

Extra line spacing appearing when using bullets in emails

Issue Number	Feature Description
MKV5-2789	Fixes an issue where the system was adding additional line spacing if the email template included a bulleted list.

Consent supplied date auto-populated by the browser preventing applicants from saving

Issue Number	Feature Description
MKV5-2799	Fixes an issue where the consent supplied date against an applicant was being populated with the user's name, this was a browser specific issue. This issue prevented a user from saving an applicant, it was also hidden if the consent supplied option had not been set to 'yes'.

Trigold integration not initialising correctly

Issue Number	Feature Description
MKV5-2838	Fixes an issue that meant when a user uses the trigold integration for the first time, it would not initialised successfully making subsequent attempts to export to trigold fail. This has now been resolved to work correctly first time.

<p><i>Note: if you are still experiencing trigold integration issues please contact support@ekeepergroup.com</i></p>
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Enhancements we're working on

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

- [MKV5-1885] - Add product expiry date filtering to follow-up/renewal stages
- [MKV5-2091] - Add CSV Upload functionality to upload case data
- [MKV5-2277] - Action Notes on Search Views
- [MKV5-2631] - User configurable Customer Notifications
- [MKV5-2667] - Reset password functionality for system users
- [MKV5-2673] - GDPR Right of Access and Right to Data Portability
- [MKV5-2675] - GDPR Right to Restrict Processing
- [MKV5-2686] - Add "Is Blank" as a search criteria option for date fields
- [MKV5-2728] - Xplan Integration
- [MKV5-2752] - Telephony Interface - Add Additional Provider
- [MKV5-2753] - Add ability to link fact find questions to GDPR fields
- [Various] - Solution Builder integration
- [MKV5-1764] - Add Bulk Letters/Printing/Emailing/SMS

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.

- [MKV5-1226] - Actions set to occur at the first stage not working
- [MKV5-1754] - HTML tags displaying instead of formatted content
- [MKV5-2514] - Some users experiencing error message when editing Attached Files
- [MKV5-2674] - Jump to page functionality not working in fact-find pages
- [MKV5-2682] - Email display issues - extra line spacing on received email
- [MKV5-2718] - Custom ticklist entry files not displaying filename when attaching to emails.
- [MKV5-2722] - Linked dropdown fields for Expected Retirement Age does not contain correct values
- [MKV5-2730] - Proc fee not calculation not working in some browsers
- [MKV5-2738] - Supporting documents 'required for each applicant' only works for the first two applicants
- [MKV5-2747] - Automation Rules - Add new products causing issues with Automation Rules
- [MKV5-2749] - Incorrect recipient displayed when attaching a produced letter to an email
- [MKV5-2757] - Fact-find answer options reordering after adding 10 options
- [MKV5-2765] - Product reference column blank when exporting a outbound commission report

- [MKV5-2834] - changing the lender can cause commission payments to duplicate if the payments have been recorded as received.