

Ekeeper Group

CRM Release Note for Version  
[MKv5 – 6.24.0]  
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# Introduction

These software release notes cover all system modifications for version MKv5 6.24 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.

## Solution Builder Integration

Issue Number	Feature Description
N/A	We have added a solution builder integration to the system. A new panel now appears in the user setup page which allows you to enter your solution build credentials (per user). There is a little configuration to perform before you can use the integration, however we have a <a href="#">Solution Builder Integration Guide</a> available to guide you through it. We also have a guide on <a href="#">how to use the Solution builder integration</a> available.

## Add print functionality to individual action notes

Issue Number	Feature Description
MKV5-2136	Users can now print individual action notes

## Customer notification functionality

Issue Number	Feature Description
MKV5-2631	It is now possible to add a notification to a customer, which will popup when the customer is edited or if a case is accessed that is associated with that customer.

## GDPR Right to Restrict Processing

Issue Number	Feature Description
MKV5-2675	Add ability to restrict modification capability of customer details.

## Update portal fact-find review process to account for linked fields

Issue Number	Feature Description
MKV5-2905	The portal factfind answer review process now handles linked fields

# Bugs fixed in this release

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

## Defect with updating User Teams description

Issue Number	Feature Description
MKV5-143	Fixes an issue that prevented users from updating the names of teams

## Tax bracket merge fields populating incorrectly

Issue Number	Feature Description
MKV5-1334	Fixes an issue where Tax brackets merge fields would display as raw value of bracket percentage rather than descriptive text

## Fact Find - Structure List - Search for Merge Field not highlighting matching result.

Issue Number	Feature Description
MKV5-1590	Fixes an issue which meant if a user tried to search for a particular merge field in the fact-find structure(s) settings menu, then the system was not finding the correct results.

## Fact Find - Merge Field Prefix does not accept certain symbols

Issue Number	Feature Description
MKV5-1640	Fixes an issue which meant certain symbols such as £-signs would not be stored correctly against merge field prefixes. This caused symbols such as 'Á' to appear before the prefix.

## Total not calculating when paying off individual participant cases

Issue Number	Feature Description
MKV5-1742	Fixes an issue which means if a user is selecting to pay off individual participant payments, then the total would not update.

## HTML tags displaying instead of formatted content

Issue Number	Feature Description
MKV5-1754	Fix display issue where user inputted HTML content does not format correctly.

## 504 error when clicking a stage on the Business Summary

Issue Number	Feature Description
MKV5-2328	Fixes an issue where some users would experience a 504 error when accessing stages via the business summary on the home page.

## Customer Custom Fields display issue

Issue Number	Feature Description
MKV5-2390	Fixes an issue where existing customer custom fields would not appear in the list of customer custom fields when accessing System settings > Customer Custom Fields

## Simple Tasks on insurance not saving

Issue Number	Feature Description
MKV5-2466	Fixed issue causing task text to not save on insurances

## Commission Update screen is missing

Issue Number	Feature Description
MKV5-2548	Fixed issue that was preventing the commission update message from displaying when saving a product. Users would previously experience a continue button with no message. The message now appears as expected.

## Find Existing customer window does not close upon selection of an applicant

Issue Number	Feature Description
MKV5-2603	Fixes an issue where the 'find existing applicant' window would not close after making a selection.

## Error 500 when deleting a stage

Issue Number	Feature Description
MKV5-2630	Fixes an issue which meant that if a user tried to delete a stage, then the system would present an error.

## Jump to page functionality not working within fact-find pages

Issue Number	Feature Description
MKV5-2674	Fixes the 'jump to page' functionality within the fact-find. Users can now choose to navigate quickly to any page in their fact-find using the jump to dropdown.

## Email display issues - extra line spacing on received email

Issue Number	Feature Description
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MKV5-2682	Fixes some line spacing inconsistencies between the email template setup and when the email is sent from the product.
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## Merge Fields - Portal login password merge field displays wrong password

Issue Number	Feature Description
MKV5-2689	The portal password merge field now displays the correct password when placed into an email template and then produced on a product.

## Proc fee not recalculating when changing/selecting a lender (Internet Explorer only)

Issue Number	Feature Description
MKV5-2730	Fixes an issue whereby the system would not prompt to recalculate the proc fee after the user changes the lender. This would affect some users when accessing the system via Internet explorer only.

## Fact-find answer options reordering after adding 10 options

Issue Number	Feature Description
MKV5-2757	Fixed a bug where Fact-find answer options for radio groups or dropdown questions would reorder after adding 10 options.

## Supporting document status circle not saving status

Issue Number	Feature Description
MKV5-2763	Fixed an issue that prevented the supporting documents satisfactory icon from saving. The reason was because a receipt of a file had not been recorded. The system now prompts a user if no receipt has been recorded and the user is trying to register if an item is satisfactory.

## Blank product column when exporting commission report

Issue Number	Feature Description
MKV5-2765	Fixes an issue which meant the product column was blank when opening the exported spreadsheet

## Consent Wording popup box blocking some input fields

Issue Number	Feature Description
MKV5-2808	Fixes issue where some parts of inputs may not be clickable when adding an applicant to a case

## Participants - Show Products tab broken

Issue Number	Feature Description
MKV5-2809	Fixed issue where "Show Products" section did not appear on "Participant Edit" page

## Duplication of payments

Issue Number	Feature Description
MKV5-2834	Fix to issue causing commission payments to be duplicated if the lender is changed when payments already exist

## Hide field height when text area is selected

Issue Number	Feature Description
MKV5-2862	Changed 'text field' creation page (fact-find), so that if a user chooses to create a text field type question, then the height field is hidden as it is not applicable.

## Unable to add / edit Field effects for Fact Find Questions

Issue Number	Feature Description
MKV5-2864	Fixes an issue making it impossible to save field effects on text type Fact Find questions. Also fix to make it possible to select the questions to set the minimum and maximum values for a numeric Fact Find question if the "Min and Max based on other questions" is checked

## Linked questions to custom fields do not work

Issue Number	Feature Description
MKV5-2904	Fix to issue whereby Fact Find fields linked to Custom Fields were not updating back to the custom field on the product.

## First save on a product

Issue Number	Feature Description
MKV5-2913	Fixes an issue which meant if no applicants were added to a case, and then a user saved the case an error would display due to GDPR consent checking functionality.

## Invalid breadcrumb on Bulk Action page

Issue Number	Feature Description
MKV5-2926	Fixed invalid breadcrumb on bulk action page

## Lender selection for insurance product setup is ignored

Issue Number	Feature Description
MKV5-2957	Fixes an issue whereby the system would display <i>all</i> lenders regardless of configuration for insurance products.

## Application reference View profile set to 'view only' hides the field value incorrectly

Issue Number	Feature Description
MKV5-2960	Fixes a display issue which meant if a product's view profile was configured so that the <i>Application Reference</i> was set to 'view only' then the reference number would disappear completely instead of displaying in a read only format.

## Stage move that deactivates customer Portal login causes error

Issue Number	Feature Description
MKV5-2967	Fixed issue where a stage change that should trigger a portal user deactivation would sometimes fail.

## Default simple task status display issue on new cases/stage listings

Issue Number	Feature Description
MKV5-2992	Fixes a display issue which was preventing default task statuses from displaying correctly on the product and in the stage listing. Users would experience a status display of 'N/A' instead of their chosen default status.

## Double-clicking save button when creating a participant causing duplicate entries

Issue Number	Feature Description
MKV5-2998	Fixes an issue where a user could click save multiple times and this would cause duplicate entries to be saved.

## Improve wording for help text on text answer, field effects

Issue Number	Feature Description
MKV5-1605	Updated the wording for the field effects setup against text fields, this no longer mentions 'options' as this is not relevant to text based answers.

# 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
- [MKV5-2277] - Add Action Notes to Search Views
- [MKV5-2667] - Reset password functionality for system users
- [MKV5-2673] - GDPR Right of Access and Right to Data Portability
- [MKV5-2686] - Add "Is Blank" as a search criteria option for dates
- [MKV5-2728] - Xplan Integration Specification
- [MKV5-2752] - Telephony Interface - Add Additional Provider
- [MKV5-2753] - Add link fact find question for GDPR fields
- [MKV5-1764] - Add Bulk Letters/Printing/Emailing/SMS to version 5
- [MKV5-2048] - Product Group Level - Search View

# 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] - Defined actions not working on first save on a product
- [MKV5-2514] - Attempting to edit Attached File entries causes a 502 Bad Gateway error
- [MKV5-2715] - Add extra security to security answer against customers and participants
- [MKV5-2718] - Custom ticklist entry files not displaying filename when attaching to emails.
- [MKV5-2722] - Correct values not displaying for fact-find questions that are linked to the expected retirement age
- [MKV5-2738] - Allow 4 applicant rows for supporting documents that are required for 'each applicant
- [MKV5-2747] - Adding new products causes Automation Rules to not function correctly
- [MKV5-2749] - Attaching a produced letter to an email, displayed recipient is incorrect
- [MKV5-2762] - Simple tasks not saving (customer specific)