

Ekeeper Group

CRM Release Note for Version  
[MKv5 – 6.18.0]  
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## Introduction

These software release notes cover all system modifications for version MKv5 6.18.0 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.

Add ability to update simple task statuses from the simple tasks panel

Issue Number	Feature Description
MKV5-1789	Users are now able to update task statuses from within the simple tasks panel as well as clicking edit to update the status. This specifically addresses simple tasks that have multiple statuses to choose from.

## Bugs fixed in this release

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

Incorrect warning on template maintenance page

Issue Number	Feature Description
MKV5-1028	Fixed an issue where the document size warning would display against all letters regardless of their size.

Remove erroneous secondary stage occurrences on some cases

Issue Number	Feature Description
MKV5-1693	This fixes an issue where some cases would incorrectly display a secondary stage and next stage due date.

Reverse auto-increment on fact-find option answers for dropdown and radio group questions

Issue Number	Feature Description
MKV5-1865	This issue fixes an issue that meant if a user removed an answer option from a dropdown or radio group question in the fact-find structure maintenance and then subsequently tried to add another answer option, the sequence number for the new row was



	auto-incrementing incorrectly. It was taking into account the sequence of the deleted option instead of reusing it.
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Display date of birth field against edit/create participant screen

Issue Number	Feature Description
MKV5-1919	Fixes an issue that meant a user could create a search view including a date of birth field, however the field would not appear when creating or editing a participant.

Allow customer custom fields with the same sequence number

Issue Number	Feature Description
MKV5-2035	Fixed an issue that meant if a user created a customer custom field with the same sequence number as an existing one, then this could overwrite the existing one.

Fix applicant dependent fact-find page functionality

Issue Number	Feature Description
MKV5-2100	Fixes an issue that meant fact-find pages would not display if they were set to only display depending on the number of applicants associated with the product. Pages now display correctly with differing numbers of applicants

Fix portal user ID creation

Issue Number	Feature Description
MKV5-2200	Fixes an issue that meant users were unable to create customer portal user IDs

Fix incorrect diary entry case association

Issue Number	Feature Description
MKV5-2269	Fixes automated diary entries that were incorrectly associated with the wrong case. This meant that diary entries would appear on the



	homescreen linked to an incorrect case. Diary entries now display correctly.
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Fixes search criteria for participant types and Applicant mortgage sources

Issue Number	Feature Description
MKV5-2288	When running a search, if users set search criteria in the following areas, then the search would not work: <ul style="list-style-type: none"><li>• A specific participant.</li><li>• A participant type.</li><li>• Mortgage Source entry.</li></ul> Searches using the above criterion now work

Fixed a 403 error message when trying to produce a payment run statement document

Issue Number	Feature Description
MKV5-2290	Fixes an issue that prevented users from downloading the payment run word document statements.

Fixes 'Can edit action history' permission

Issue Number	Feature Description
MKV5-2299	Fixes this permission to work as intended: If switched on a user is able to create but not edit action notes in the system, if turned off a user is no longer able to edit action notes.

Unable to run searches with a date ranges of From or Specify Date Range

Issue Number	Feature Description
MKV5-2301	This fixes an issue that prevented users from performing a search if the any date criteria they had selected included a range of <i>From</i> or <i>Specify Date Range</i> .



Unable to export commission report to excel

Issue Number	Feature Description
MKV5-2312	Fixes an Internet issue in the URL of a commission report page that prevented users from exporting to excel when logged into the system using Internet Explorer.

Illustrations not important when sourcing combined ESIS and sourcing results using the trigold integration

Issue Number	Feature Description
MKV5-2319	Fixes an issue that meant imported ESIS illustrations from Trigold would fail if a user sourced both the ESIS and sourcing results at the same. This would mean the illustration entry would appear on the mortgage but the file remained inaccessible. Any newly sourced illustrations are now accessible. <i>Note: that this does not fix and previously failed illustrations</i>

Fatal Error E on the employment page of the fact-find

Issue Number	Feature Description
MKV5-2334	Fixed an issue that prevented users from navigating away from the employment page in their fact-finds once they were locked. A user would be presented with a fatal error E message that prevented them from navigating away.



## 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] - Errors with Triggered Diary entry setup
- [MKV5-1496] - Ticklist Phrases showing incorrectly in documents in certain circumstances
- [MKV5-1588] - Fact Find - 'Options can be driven by another question' not working as expected
- [MKV5-1614] - Quick search autocomplete not currently working as expected
- [MKV5-1655] - Saved Searches not working as expected
- [MKV5-1754] - HTML tags displaying instead of formatted content
- [MKV5-1814] - Some global settings not saving when users make changes
- [MKV5-1883] - Unlicensed users unable to allocate licences
- [MKV5-1885] - Missing product expiry searching functionality in follow-up stages
- [MKV5-2030] - Missing prompt on creation of diary entry based on simple task status change
- [MKV5-2233] - Occupation remaining disabled if changing employment type from unemployed to employed
- [MKV5-2236] - Formatting issues with action history notes
- [MKV5-2244] - Duplicated 'policy type' setting in the view profile pages against products
- [MKV5-2263] - Difficulties sending emails to multiple applicants
- [MKV5-2264] - Database reference numbers appearing in excel exports instead of the values from the field.
- [MKV5-2294] - Unable to perform a search against multiple options from dropdown custom fields
- [MKV5-2307] - Incorrect advisors displaying on product commission rows in the commission reports screen
- [MKV5-2309] - Simple Tasks still displaying when set to inactive
- [MKV5-2330] - New email templates default to 'All companies' as the recipient instead of 'all applicants'
- [MKV5-2335] - Product reference missing from payment run statement documents
- [MKV5-2361] - Portal notification disappearing when changing home page summary for option to 'all'
- [MKV5-2395] - White screen displaying when producing a spreadsheet document





## New features and improvements in progress

- [MKV5-1620] - Add cancel button to Fact Find -> Create Questions
- [MKV5-1857] - Implementing Section Tag functionality for Multi associated 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 the system
- [MKV5-2246] - Add a case tracking report functionality
- [MKV5-2248] - Additional Commercial Mortgage Product Detail Fields
- [MKV5-2250] - Show *inactive* custom fields on existing/historical products where data is held against them.
- [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 on a case
- [MKV5-2338] - Solution Builder Integration
- [MKV5-1548] - Implement HTTP posting interface
- [MKV5-1732] - Add "All Participants" field as a search view field to replicate legacy search views
- [MKV5-2295] - Add 'product type' as a field option in custom search views