Ekeeper Group

CRM Release Note for Version [MKv5 – 6.20.0]

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Introduction

These software release notes cover all system modifications for version MKv5 6.20.0 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.

Implemented updated styling to attached files edit page

Issue Number	Feature Description
MKV5-97	Enhanced the the look and feel of the edit attached files page. This can be found by clicking edit next to any attached file on your products.

Ability to hide Fact Find repeating pages, sections and questions

Issue Number	Feature Description
MKV5-1858	We've improved the way the way fact-find pages display when entering the fact-find. If you access your fact-find via a product e.g. a mortgage or life cover product, then the system will display pages that are associated with that particular product along with generic pages such as applicant details. Pages associated with other products than the one you access will be hidden by default. You can then choose to show the hidden pages that are associated with other products. We've also updated the case summary tab to include an Enter Fact-find button. If accessed via this button, all pages are displayed against all products as well as generic pages (applicant pages)

Improve commission visibility on cases and products

Issue Number	Feature Description
MKV5-2317	Our team has listened to your feedback and have improved the commission visibility on your products and cases. First we've added a new commission column on the summary tab to show the totals for each product listed. To find out the breakdown just hover over the little blue 'i' that appears against each total. We've also included a commission column in the related products panel and a total field at the bottom. You can decide which product's commission is included in the total, if its not included it will still display but we've greyed it out to make it clear that it is not included in the total.

| | Just in case you want to see a breakdown against each product total we've added another hover 'i', which will do just that. |
| | Whilst working on the related products panel, we've also brought back another column from our earlier system that our customers have been missing. You can now find the task text column against insurances, this will display any text that you've added to the task text field within your insurance product. |

Improve readability of payment run statement document

Issue Number	Feature Description
MKV5-2355	Our technical team have improved the spacing and layout of the table in the payment run document. We've added borders to make the table more readable and widened the columns to it the text and values better. You can access this document via commissions > payment runs.

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Brought back 'search views' to quick search results

Issue Number	Feature Description
MKV5-2360	A much loved feature has returned to the system. When you perform a search using our handy search box from any page in the system, you now have the option to change the search view against your search results.
	The best thing about search views are that you can choose which sets of information are returned in your results.
	To configure your available search views and what appears in them head to system settings and then search views. For example you may want to setup a search view that focuses on mortgage commissions or renewal dates etc.
	To use search views, simply search for a customer, case or product in the search box, then select your view in the *search view* dropdown in

	the top right of your results, this will automatically update the information displayed against your results

Added 'all participants' options in search views

Issue Number	Feature Description
MKV5-1732 MKV5-2510	You can now add the 'all participants' column to your search views. This column lists all of the participants associated with a given product, in a single column within your search results. To make use of this head to system settings > Search Views.

Updates to search view fields

Issue Number	Feature Description
MKV5-2522	To further enhance search views for our users we've added the following options: ● Date Proc Fee Received ● Proc Fee Status ● Applicant 1 Preferred Name ● Task Reference ● Task provider ● Task On Risk Date ● Task Premium ● Task Sum Assured ● Task Term We've also renamed the following, to make them more relevant: ● BuyerTypLenderNameeText TO Lender ● Applicant 1 Email2 TO Applicant 1 Secondary Email

Added product description and short description to search views

Issue Number	Feature Description
MKV5-2295	You can now add the description of your product to your search views. This can help you identify different types of products in your search results. For example if you have several *types* of mortgage setup in your system such as Buy To Let and Remortgage, then adding this search view column displays these descriptions in your search results so you can quick pick out your remortgages from your search results.

Bugs fixed in this release

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

Unable to close a diary entry that has not been filled out

Issue Number	Feature Description
MKV5-99	If you clicked to add a new diary entry and then immediately clicked the 'close' button, the system was previously preventing asking you to fill out the fields because they were blank. We've changed this so that it no long stops you in your tracks! The close button, once again, closes the diary entry.

Selecting unemployed permanently disables the occupation field

Issue Number	Feature Description
MKV5-2233	When creating or editing an applicant, you set the applicants employed field to 'unemployed' and the occupation field would disable. However if you changed the employed field back to full-time, then the occupation field would remain disabled. Our team has changed that and the occupation field is now behaving as we would expect.

Action note formatting improvements

Issue Number	Feature Description
MKV5-2236	When clicking the view link next to an action note (in the action history panel), the text was all squished together. This is because the paragraph formatting was ignored. We didn't like the look and feel of this, and we know that some users like to include email trails in their notes. So we've updated the formatting on the window to display line breaks and carriage returns. This means that notes appear intended This looks much better and long notes are much more readable!

Show inactive simple tasks when data has been entered against a product

Issue Number	Feature Description

MKV5-2250	If you deactivate a simple task using system settings, this was previously hiding the simple task even if you have used them on existing products. We've changed this! Now if you've used the inactive simple task and entered any information against it, then it will show. If you haven't used it, then it won't show. If your simple task *is* active, this will display as normal on all associated products as normal.

Product expiry date no longer populating when completing a product

Issue Number	Feature Description
MKV5-2256	Some of you have let us know that when completing your cases, the product expiry date was no longer populating. It definitely shouldn't do that so we've gone ahead and fixed it. The product expiry date now calculates when moving the product to a completion stage, the date is calculated based on the deal term field. You can still enter the date manually if you need to.

Product reference missing from payment run statement

Issue Number	Feature Description
MKV5-2335	We spotted that the reference number was no longer appearing in the payment run statement document. Whilst improving the look and feel of this (see MKV5-2355) we've taken the opportunity to add the reference number back in.

Cancelling a stage generated SMS message kicks users out of the system

Issue Number	Feature Description
MKV5-2352	When moving to a stage with stage generated SMS, if you clicked cancel instead of sending the message on users were sometimes getting kicked out of the system. We have found the cause and fixed this.

Fact-find sections and questions hidden when sourcing an illustration before entering the

fact-find

Issue Number	Feature Description
MKV5-2362	Some of you were experiencing issues with your fact-find questions not displaying if you sourced through the trigold integration before entering the fact-find. This has now been fixed, accessing your fact-find now works as normal regardless of when you source your illustrations.

Error message displayed when editing certain letter templates

Issue Number	Feature Description
MKV5-2375	Some users were experiencing an error message when editing some letter templates. We found the cause, fixed it, you won't see that error anymore!

Today's date appearing in letters instead of the intended date

Issue Number	Feature Description
MKV5-2400	If your letter pulls dates in from fields in the fact-find, then the system would insert today's date, instead of the intended date! Our tech guys have found out what was causing the problem! Your letters will now pull in the correct dates as expected!

Search results displaying numbers instead of names for users 3 and 4

Issue Number	Feature Description
MKV5-2430	When running viewing a set of search results that listed users 3 and 4, numbers would appear instead of the name of the user. We've investigated and now your results will display names instead of numbers.

Making the Fact-Find available to customers causing an error message

Issue Number	Feature Description
MKV5-2511	Some of you have been experiencing an error message when making the your fact-find available to your customers. We found the cause and fixed it

Unable to view or select custom fields when performing a search

Issue Number	Feature Description
MKV5-2516	When performing a search via reports, we found out that some users were unable to select any customer fields as criteria for their search. This needed to change, so we changed it. You can now run a search and select custom fields as criteria for your search.

Intend to move displaying as 1 or 0 in search results

Issue Number	Feature Description
MKV5-2519	If using the intend to move column in your search views, the system was previously displaying 1 and 0 instead of Yes and No. This didn't look right to us, so we've changed it to display Yes and No as you would expect.

Enhancements we're working on

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

- [MKV5-2338] - Solution Builder Integration
- [MKV5-1430] - Forgotten password functionality and password security updates
- [MKV5-1620] - Add a cancel button when creating fact-find questions
- [MKV5-1857] - Add section tag functionality for Multi Product documents
- [MKV5-1912] - Increase character limit for custom fields (text and text area)
- [MKV5-1949] - Add simple tasks to search views
- [MKV5-2091] - Add CSV Upload functionality
- [MKV5-2246] - Bring back the case tracking page
- [MKV5-2248] - Additional Commercial Mortgage Product Detail Fields
- [MKV5-2436] - Update print fact-find to allow for repeating fact-find pages
- [MKV5-2476] - Add expiry date functionality to supporting documents
- [MKV5-2496] - Improvements to email error responses
- [MKV5-2543] - Add cancel option when creating actions against simple tasks
- [MKV5-196] - Password Reset and Security improvements
- [MKV5-1042] - Add NACFB lead referral functionality
- [MKV5-1548] - Add HTTP posting API
- [MKV5-1764] - Add Bulk Letters/Printing/Emailing/SMS functionality
- [MKV5-1885] - Add product expiry date filtering to following stages

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.

- [MKV5-1496] - Supporting document phrases not working correctly
- [MKV5-1513] - Deleted prerequisite rules are still working
- [MKV5-1588] - Fact Find - 'Options can be driven by another question' not working as expected
- [MKV5-1614] - Basic/quick search not working as expected for some users
- [MKV5-1655] - Saved searches not functioning as expected
- [MKV5-1754] - HTML tags displaying instead of formatted content
- [MKV5-1814] - Some global System settings are not saving
- [MKV5-2030] - Triggered diary entries for simple tasks not prompting user upon status change
- [MKV5-2244] - 'Policy type' duplicated in the product view profile page
- [MKV5-2263] - Issues sending emails to Multiple Applicants using the 'TO' option
- [MKV5-2264] - Numbers exporting to excel instead of values
- [MKV5-2294] - Unable to select multiple custom field options in reports
- [MKV5-2310] - Product specific merge-fields not working as expected
- [MKV5-2379] - Born 'Between' Date range only looks at people born within the date range