Ekeeper Group

CRM Release Note for Version [MKv5 – 6.20.1]

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Introduction

These software release notes cover all system modifications for version MKv5 6.20.1 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.

Bugs fixed in this release

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

LTV and LTI not showing when illustration is selected on a mortgage

Issue Number	Feature Description
MKV5-2524	When a user locks and illustration sourced in trigold to a mortgage, the LTI and LTV figures were previously not displaying for some users...they display now!

System incorrectly asking to select a fact-find when exporting to trigold

Issue Number	Feature Description
MKV5-2583	When exporting to trigold, the system was asking users to choose a fact-find (even if they already had one filled out). We've changed it so that it will only ask if you do not have a fact-find already selected.

System locking when selecting an insurance based view in search results

Issue Number	Feature Description
MKV5-2236	In our last update we added in the ability to select a search view via your quick search results (after searching using the search box). However, using an insurance based search view was causing the page to freeze on occasion. We've thawed this out for you so you can select search views to your heart's content!

Quick search including a space on the end causing an error

Issue Number	Feature Description
MKV5-2594	When using the search box, if you enter a name and accidentally leave a space on the end, you would encounter an error, not any more! We've found the cause and fixed it, it won't happen again, happy searching!

Enhancements we're working on

Here's a sneak peak at some of the new features and improvements were working on!

- [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