

Reapit AgencyCloud 12.152 release notes

These notes have been exported from the online Reapit Knowledge Base, therefore some formatting, layout and links may be lost in this format

To access the release notes via the Knowledge Base, [click here](#)

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Client Accounts

No client accounts additions in this release

These notes outline the latest additions and enhancements to AgencyCloud for the above version - check which version you are using to see which features are available to you (your current version number is displayed at the bottom of the main menu bar in AgencyCloud)

Configuration options are available to Enterprise customers only

** Only applies to users of Client Accounts (UK) or Property Management Accounts (APAC)*

General

What's new

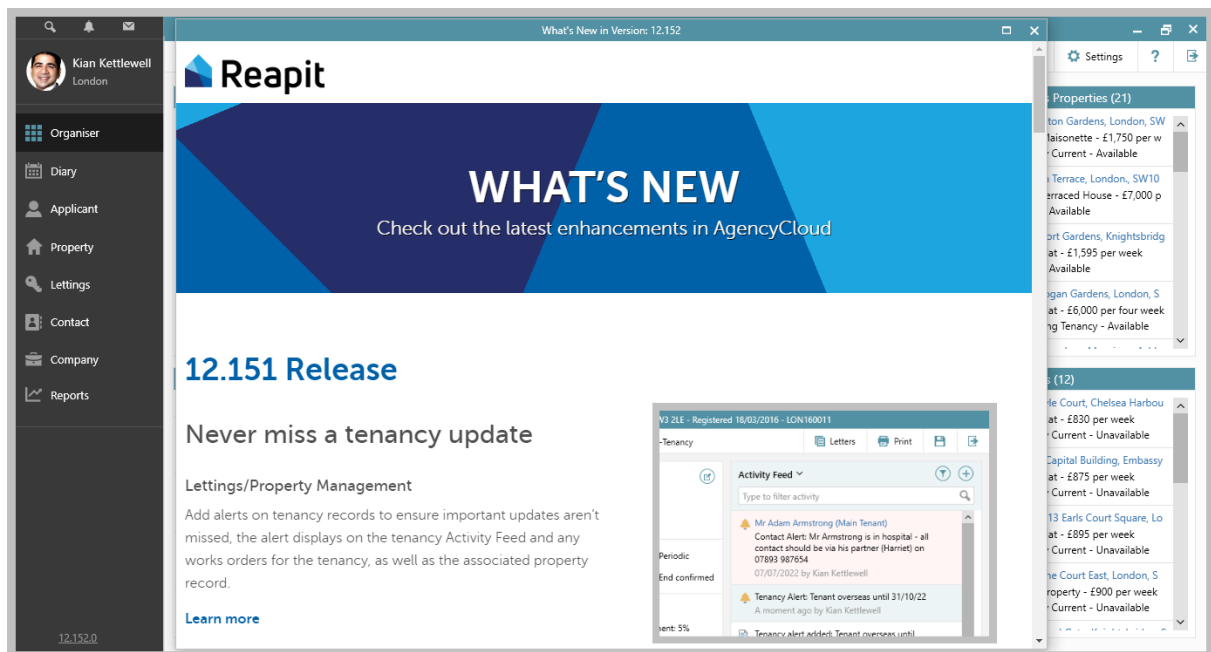
This guide has been reviewed against our global client base and classed as relevant to all regions

When AgencyCloud has been updated, after logging in for the first time the *What's new* screen will be displayed as a pop-up and summarises headline additions for the new version

Links are included to the full release notes

Viewing the What's new screen

After logging in to AgencyCloud, the **What's new** screen is displayed as a pop-up:

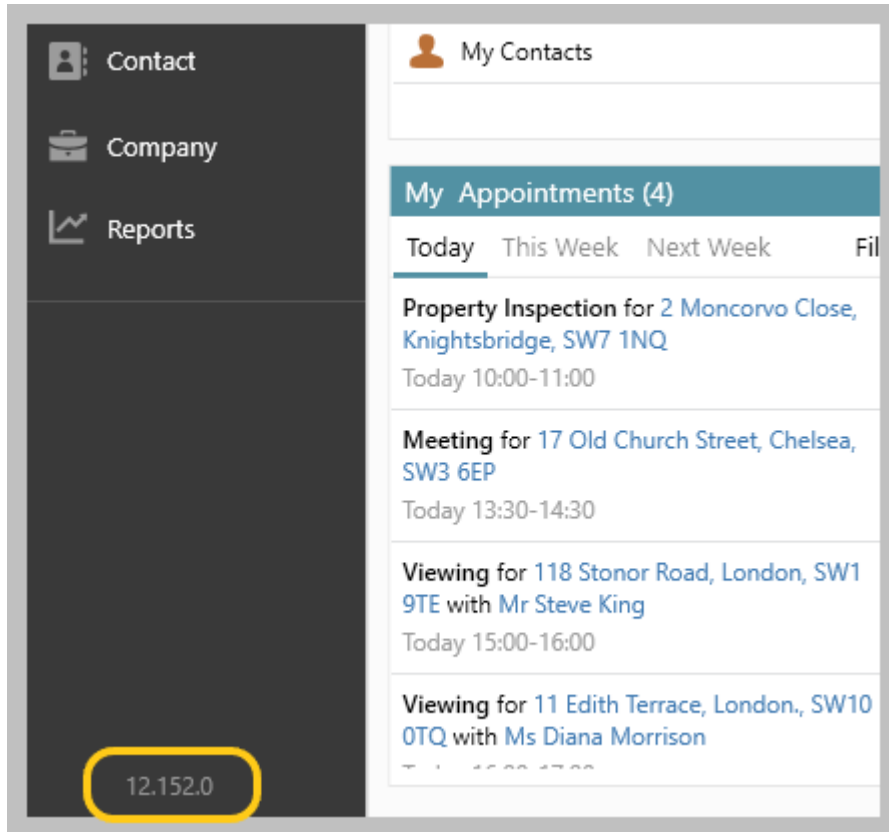


- When you're ready to exit the screen, click X (top right) to close

Accessing the What's new screen again

The *What's new* screen can be accessed at any time

- Click the AgencyCloud version number at the bottom left of the screen

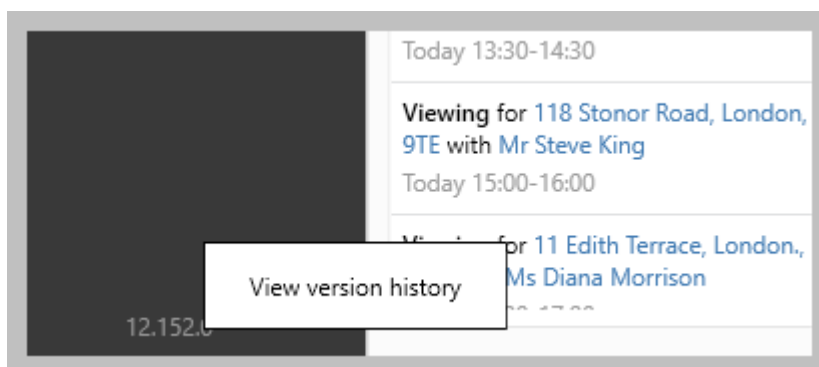


Displaying version history

Previously, clicking the version number displayed the version history

To access version history:

- Right-click version number and select **View version history**



New UI round-up: v12.152

This guide has been reviewed against our global client base and classed as relevant to all regions

As part of the new user interface (UI) project, the following screen has been redesigned in 12.152 to bring it in line with previously redesigned screens

All existing functionality exists but with a refreshed look and feel

Sales invoicing (UK only)

When creating a charge, raising an invoice, entering a payment or raising a credit note, the new UI format is used

The screenshot shows a form titled "Invoice" with the following fields and values:

- Reference:
- Date: 27/07/2022
- Amount: £100.00 VAT UK Standard (20%)
- Account:
- Description: EPC

Buttons: Cancel, Accept

For more information on sales invoicing, see Knowledge Base

Sales & lettings/rentals

Add a property alert

This guide has been reviewed against our global client base and classed as relevant to all regions

An alert can be created on a property record - this alert displays on the property Activity Feed and the associated contact record - for lettings properties, it also displays on the landlord record and any works orders for the property

AgencyCloud 12.152+ also allows applicant alerts to be added (for guide, see Knowledge Base)

Pre-Agency Cloud 12.152, alerts can also be created from a contact record & a tenancy record (for guides, see Knowledge Base)

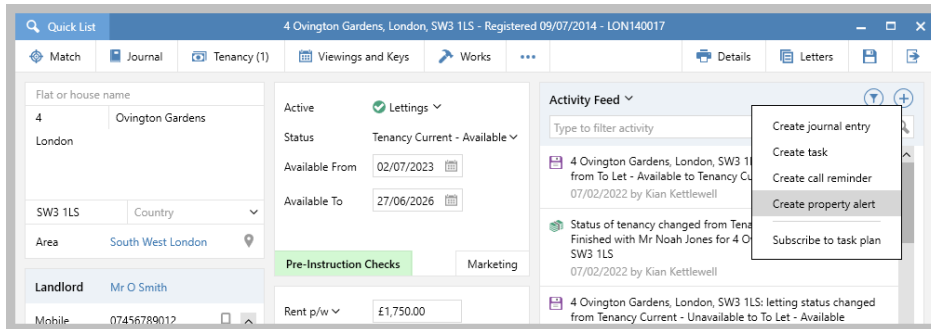
One property alert can be added - a property alert is added in addition to any other types of alert currently in place

1. Create property alert

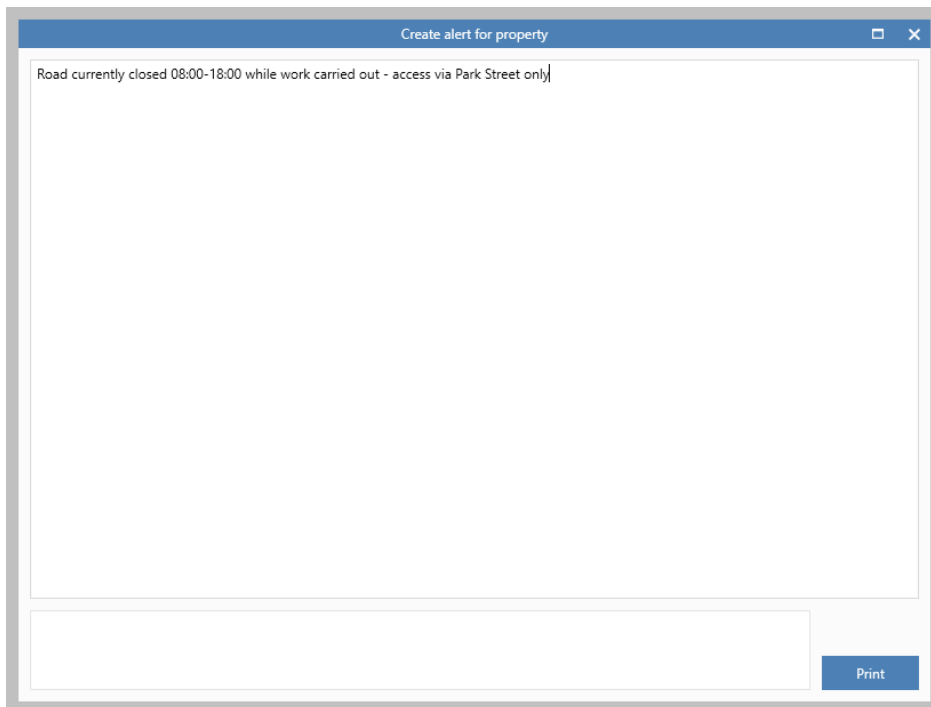
Open the property record where the alert is to be added

From Activity Feed panel:

- Click  and select **Create property alert**

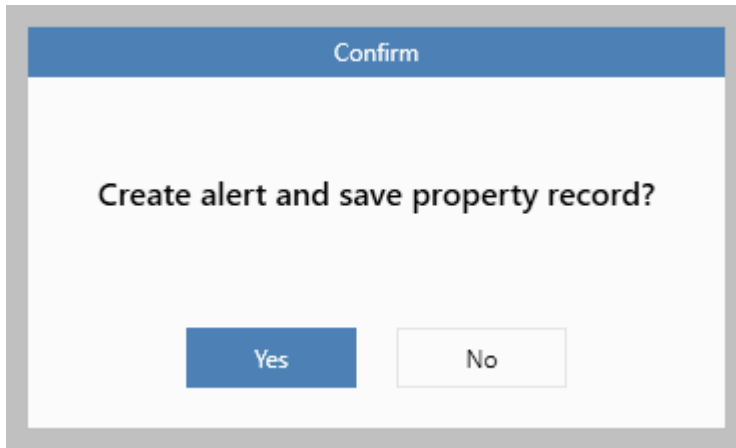


- Enter alert text



- Click the cross (top right corner) to save & close the alert

- A prompt will be displayed - click **Yes**

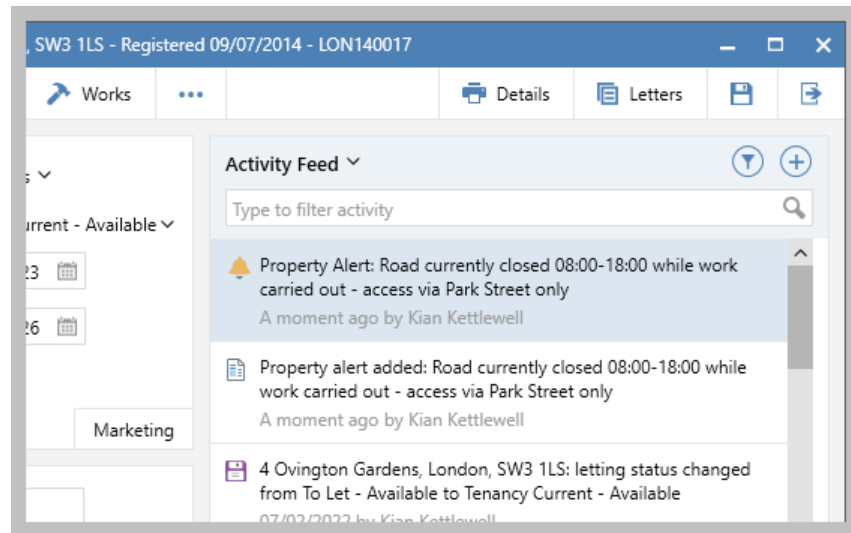


2. View alert

- Alerts are displayed at the top of the property **Activity Feed**

For lettings properties, the alert is also displayed on the property's landlord record & works orders, see step 3

The alert will stay in place until it is updated or cleared, see step 4



3. Property alert on landlord record & works orders

The alert is also displayed on:

- the property's landlord record

The screenshot displays a software interface for a landlord record. At the top, it identifies the user as 'Mr O Smith - Registered 09/07/2014 - LON140004'. The interface is divided into several sections:

- Individual Profile:** Shows 'Mr O Smith' with contact details: Mobile 07456789012, E-mail oscar@smithsons.com, and Work 01925 789456. It also includes 'Identity Check' and 'Marketing Consent' status.
- Financial:** Lists 'Bank: High Street Bank - A/C: 789456123' and 'Ownership: 100%'. It has tabs for 'Active', 'Source', and 'Board'.
- Joint Landlords:** A section with a plus icon to add more.
- Landlord's Properties:** Lists '4 Ovington Gardens (Tenancy Current - Available)'.
- Activity Feed:** Contains a search bar and several alerts, including a prominent one for '4 Ovington Gardens, London, SW3 1LS' regarding a road closure for work.
- Relationships:** Shows 'Main Office London' with a star icon.

- any works orders for the property

The screenshot displays a 'Works Order' interface for 'Works Order (LON22000007)'. It includes the following sections:

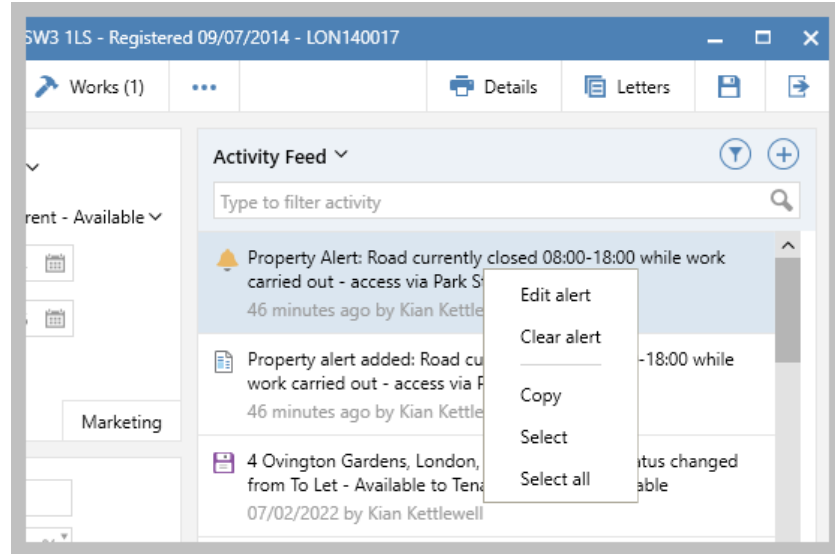
- Works Order Summary:** Status 'Raised', Booked On '27/07/2022', Work Type 'Smoke Alarms', Required By '05/08/2022', Reported By 'Landlord', Booked By 'Kian Kettlewell', and Priority 'Medium'.
- Works Details:** Work Title 'Supplu & fit new smoke alarm in entrance hall', Net Cost '£150.00', and Charge to 'Landlord'.
- Contractor:** 'Bobs Electrical Services, West Lo...' with contact details.
- Property:** '4 Ovington Gardens, London, SW3 1LS' with Landlord 'Mr O Smith' and contact details.
- Instructions:** 'Landlord approval required over: £250.00', 'Float held: £0.00'.
- Activity Feed:** Shows an alert for the property regarding a road closure.

Alert links allow you to navigate to the associated property record

4. Edit/clear alert

From the property alert:

- Right-click alert for options to **Edit alert** or **Clear alert**
 - **Edit alert**
Alert text window is displayed, update alert and close window
 - **Clear alert**
Prompt is displayed, click **Yes** to clear



Where configured, alert changes can be added to the Activity Feed (for guide, see Knowledge Base)

Add an applicant alert

This guide has been reviewed against our global client base and classed as relevant to all regions

An alert can be created on an applicant record - this alert displays on the applicant Activity Feed and the associated contact record

AgencyCloud 12.152+ also allows property alerts to be added (for guide, see Knowledge Base)


Pre-Agency Cloud 12.152, alerts can also be created from a contact record & a tenancy record (for guides, see Knowledge Base)

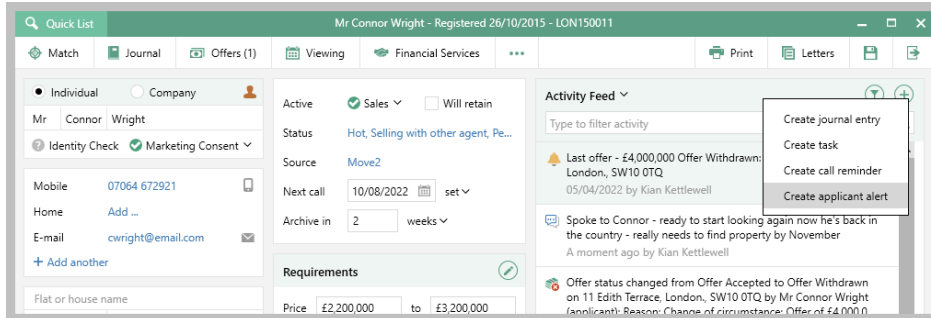
One applicant alert can be added - an applicant alert is added in addition to any other types of alert currently in place

1. Create applicant alert

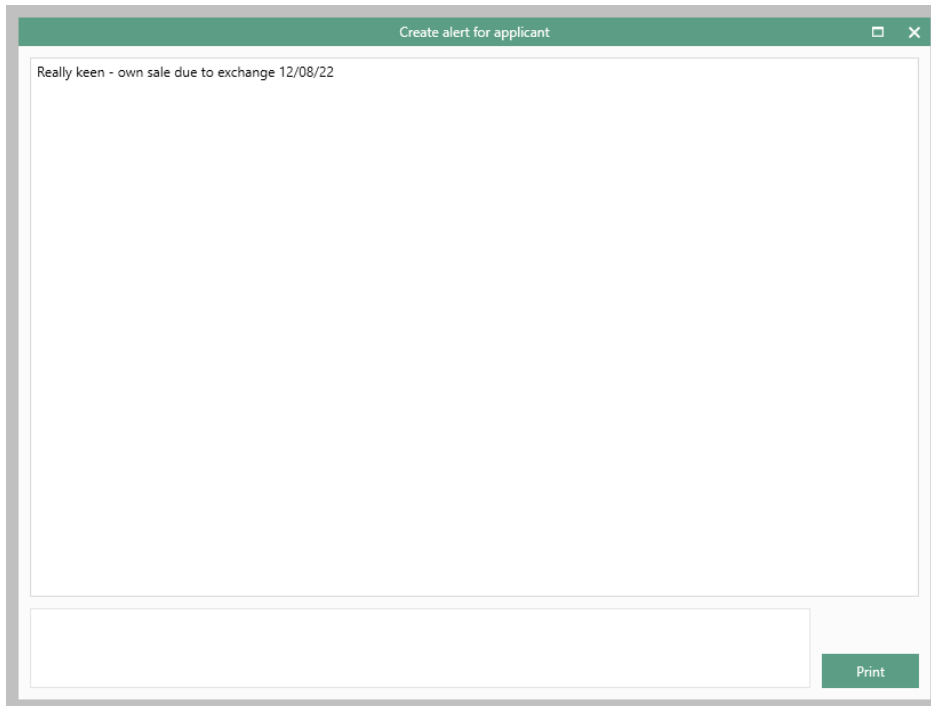
Open the applicant record where the alert is to be added

From Activity Feed panel:

- Click  and select **Create applicant alert**

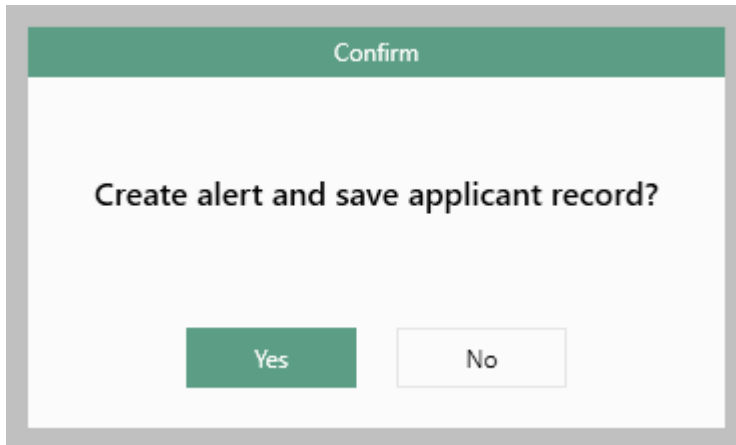


- Enter alert text



- Click the cross (top right corner) to save & close the alert

- A prompt will be displayed - click **Yes**

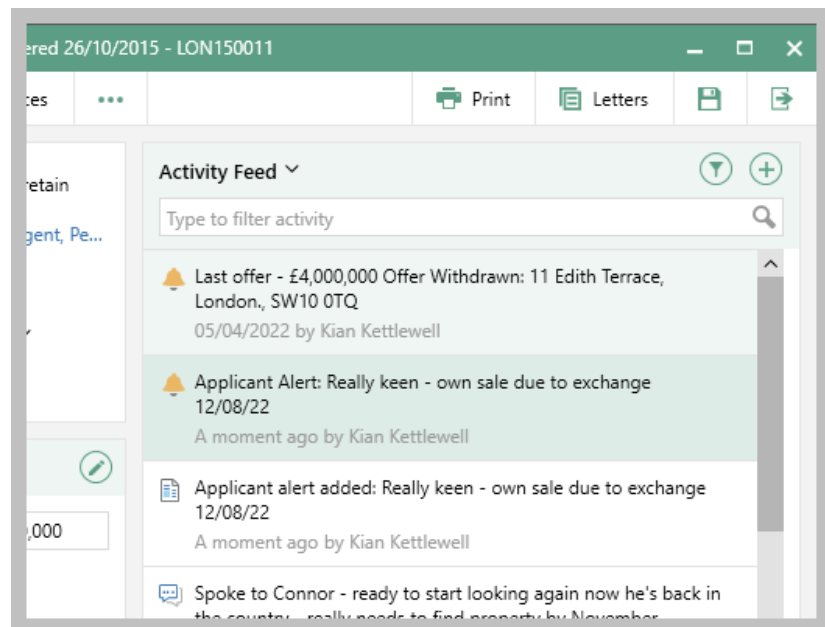


2. View alert

- Alerts are displayed at the top of the applicant **Activity Feed**

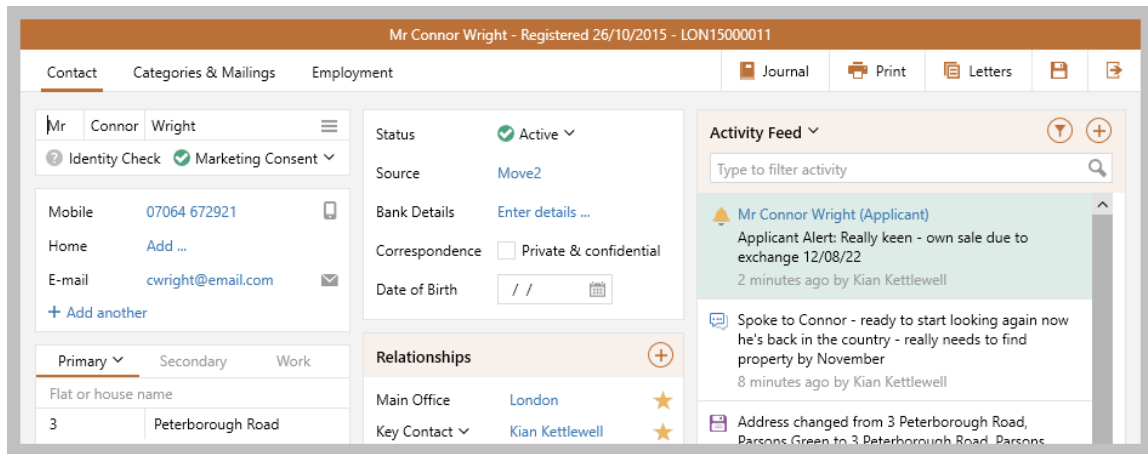
The alert is also displayed on the contact record, see step 3

The alert will stay in place until it is updated or cleared, see step 4



3. Applicant alert on contact record

The alert is also displayed on the contact record

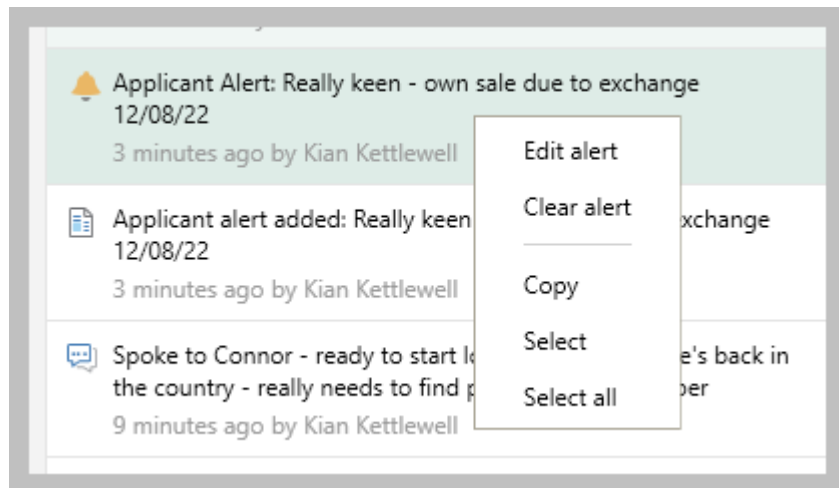


Alert links allow you to navigate to the associated applicant record

4. Edit/clear alert

From the applicant alert:

- Right-click alert for options to **Edit alert** or **Clear alert**
- **Edit alert**
Alert text window is displayed, update alert and close window
- **Clear alert**
Prompt is displayed, click **Yes** to clear



Where configured, alert changes can be added to the Activity Feed (for guide, see Knowledge Base)

Alerts shown in grids on Organiser & Power Reports

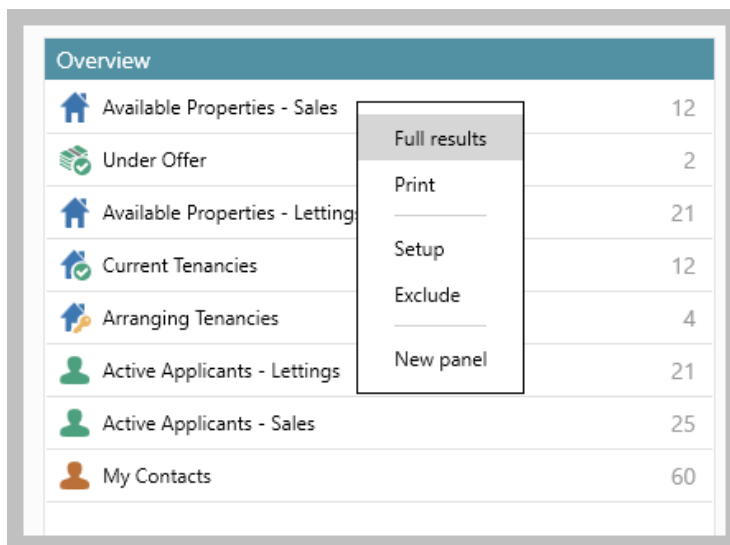
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In AgencyCloud 12.151, when viewing property, applicant and contact grid lists - alert information can be shown (in AgencyCloud 12.152, tenancy grids will also show alerts)

A grid is shown when viewing a full results list via the Organiser and also after running a Power Report

1. Organiser

- Right-click over a list and select **Full results** - e.g. **Available Properties**



- The grid will be displayed and the **Alert** column can be added, **see point 3**
- Click the **Alert** column heading to sort by alert added/not or click to the right of the column heading for options to search alert content

Reference	Address	Price	Status	Alert	Vendor	Phone
LON170007	Unit 6 Park View Square	£600,000	For Sale - Available		Ford Homes, Newcastle	b: 0844 372 1892; e: General
LON150001	12, Ambrose Building	£1,000,000	For Sale - Available	Open house viewing onl...	Mr Andrew Lewis	m: 07536672770; e: aLewis@
LON150003	Riverlight Four, Riverlight Quay	£1,000,000	For Sale - Available		Mr Brayden Roberts	m: 07557164821; e: broberts
LON210011	118 Stonor Road, London, SW1 9TE	£1,200,000	Under Offer - Available	Vendor overseas until 1s...	Mr Ian Turner	m: 07912 456789; e: ian.turn
LON170004	Unit 3 Park View Square	£3,300,000	Under Offer - Available		Ford Homes, Newcastle	b: 0844 372 1892; e: General
LON170003	Unit 2 Park View Square	£3,500,000	For Sale - Available		Ford Homes, Newcastle	b: 0844 372 1892; e: General
LON170002	Unit 1 Park View Square	£4,000,000	For Sale - Available		Ford Homes, Newcastle	b: 0844 372 1892; e: General
LON150016	11 Edith Terrace, London.	£4,100,000	For Sale - Available		Ford Homes, Newcastle	b: 0844 372 1892; e: General
LON140005	76 Sloane Court East, London	£4,250,000	For Sale - Available		Mr T Myles	e: tim@myles.com; m: 0765:
LON140002	17 Old Church Street, Chelsea	£5,500,000	For Sale - Available		Mrs C Lampard	m: 07890 567898; h: 020 987
LON140012	2 Moncorvo Close, Knightsbridge	£11,000,000	For Sale - Available		Mr J Leighton	h: 0203456789; m: 0765890;
LON150007	Cavendish Road, Weybridge, Surrey	£13,000,000	For Sale - Available	Road closed 08:00-18:0...	Mr Adam Armstrong	m: 07744556578; e: aram@e

Selecting available properties in the Organiser shows a property grid, therefore the alert type shown are property alerts

2. After running a Power Report

After running a Power Report:

- The results are shown in a grid and the **Alert** column can be added, **see point 3**
- Click the **Alert** column heading to sort by alert added/not or click to the right of the column heading for options to search alert content



New Applicant Report 8 Applicants

Office	Manager	Name	Address	Min Price	Max Price	Alert
LON	KMK	Miss A Terry	767 Fulham Road, Chelsea, London	£4,000,000	£6,000,000	
LON	KMK	Ms Madelyn Thomas	101 Birdhurst Rise, Croydon	£2,000,000	£3,000,000	Will rent if not found by Oct 2022
LON	KMK	Miss Victoria King	13, 1 Lockington Road	£500,000	£2,000,000	
LON	KMK	Mr Caleb Jackson	99 Warriner Gardens, Battersea	£1,000,000	£3,500,000	
LON	KMK	Mr Connor Wright	3 Peterborough Road, Parsons Green	£2,200,000	£3,200,000	Really keen - own sale due to exchange 12/08/
LON	KMK	Ms Aubrey Waker	33 Eastbourne Road, Chiswick	£500,000	£2,400,000	
LON	KMK	Mr Ryan Cooper	2 Swan Close, Rickmansworth	£3,000,000	£6,000,000	
LON	KMK	Mr Carl Young	38 Singer Lane, Oxford, OX1 3HJ	£400,000	£800,000	

Running an applicant report will show an applicant grid, therefore the alert type shown are applicant alerts

3. Add alert column to Organiser or Power Report results grid

Once added & saved on each grid type (i.e. contact, property, applicant), the alert column will always be displayed

Via the Organiser or Power Report results grid (on a contact, property or applicant grid):

- Right-click over the column headings, select **Pick columns** and click **More**
- Tick **Alert** and click **Accept**

The screenshot shows a web application window titled "Available Properties - Sales". The main content is a table with 12 properties listed. A "Choose Columns" dialog box is open in the center, allowing the user to select which columns to display. The "Alert" column is checked in the dialog. The dialog also includes "Move Up" and "Move Down" buttons, a "Width of selected column" input field, and "Cancel" and "Accept" buttons at the bottom.

Reference	Address	Price	Status	Vendor	Phone	Office	Manager
LON170007	Unit 6 Park View Square	£600,000	For Sale - Available	Ford Homes, Newcastle	b: 0844 372 1892; e: General...	London	Kian Kett
LON150001	12, Ambrose Building	£1,000,000			m: 07536672770; e: aLewis@...	London	Kian Kett
LON150003	Riverlight Four, Riverlight Quay	£1,000,000			m: 07557164821; e: broberts...	London	Kian Kett
LON210011	118 Stonor Road, London, SW1 9TE	£1,200,000			m: 07912 456789; e: ian.turn...	London	Kian Kett
LON170004	Unit 3 Park View Square	£3,300,000			b: 0844 372 1892; e: General...	London	Kian Kett
LON170003	Unit 2 Park View Square	£3,500,000			b: 0844 372 1892; e: General...	London	Kian Kett
LON170002	Unit 1 Park View Square	£4,000,000			b: 0844 372 1892; e: General...	London	Kian Kett
LON150016	11 Edith Terrace, London.	£4,100,000			b: 0844 372 1892; e: General...	London	Kian Kett
LON140005	76 Sloane Court East, London	£4,200,000			e: tim@myles.com; m: 07653...	London	Kian Kett
LON140002	17 Old Church Street, Chelsea	£5,500,000			m: 07890 567898; h: 020 987...	London	Kian Kett
LON140012	2 Moncorvo Close, Knightsbridge	£11,000,000			h: 0203456789; m: 07658907...	London	Kian Kett
LON150007	Cavendish Road, Weybridge, Surrey	£13,000,000			m: 07744556578; e: aram@a...	London	Kian Kett

- The new **Alert** column is added to the right of the grid, click and drag to reposition

- Right-click column headings again and select **Save grid layout**

Available F			
Double-click to view			
Reference	Address	Price	Status
LON170007	Unit 6 Park View Square		Sale - Availa
LON150001	12, Ambrose Building		Sale - Availa
LON150003	Riverlight Four, Riverlight Qu		Sale - Availa
LON210011	118 Stonor Road, London, S		er Offer - Av
LON170004	Unit 3 Park View Square		er Offer - Av
LON170003	Unit 2 Park View Square		Sale - Availa
LON170002	Unit 1 Park View Square		Sale - Availa
LON150016	11 Edith Terrace, London.		Sale - Availa
LON140005	76 Sloane Court East, Londo		Sale - Availa
LON140002	17 Old Church Street, Chelse		Sale - Availa
LON140012	2 Moncorvo Close, Knightsb		Sale - Availa
LON150007	Cavendish Road, Weybridge,		Sale - Availa

- Save grid layout
- Reset to default
- Set filter as default
- Convert to currency >
- Pick columns >
- Show yes/no as image
- Autosize column
- Autosize all columns
- Autosize all to fit screen
- Export to >

Tenant admin fee VAT option

This guide has been reviewed against our global client base and classed as relevant to all regions

When adding a tenant admin fee as a recurring charge, the option to include VAT/GST is available

From Tenancy Renewals and Alterations:

- Select **Recurring Charge**
- Select **Charge Type** as **Tenant Admin Fee**
- Beside **Net Amount** field, an option to **Include VAT/GST** is available on right

The screenshot shows a form titled "Tenancy Renewals and Alterations". It has three radio button options: "Alteration", "Renewal", and "Recurring Charge", with "Recurring Charge" selected. The "Alteration" option includes a date range from "01/08/2022" to "31/07/2023" and a "Reset instalment start date" checkbox. The "Recurring Charge" section includes the following fields: "Charge Type" set to "Tenant Admin Fee", "Account" set to "Recurring Admin Fees", "Net Amount" set to "£10.00" with a checked "Include VAT" checkbox, "Recur every" set to "1" "Months", and "Narrative" set to "Admin". At the bottom right, there are "Cancel" and "Accept" buttons.

Periodic tenancy reason - configuration option

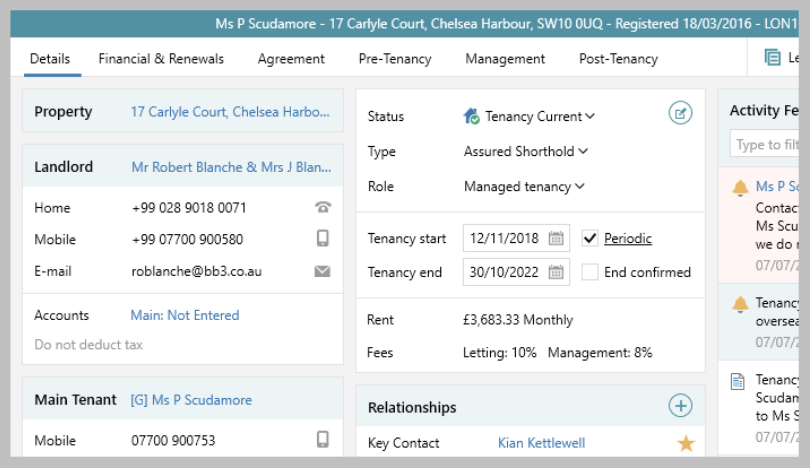
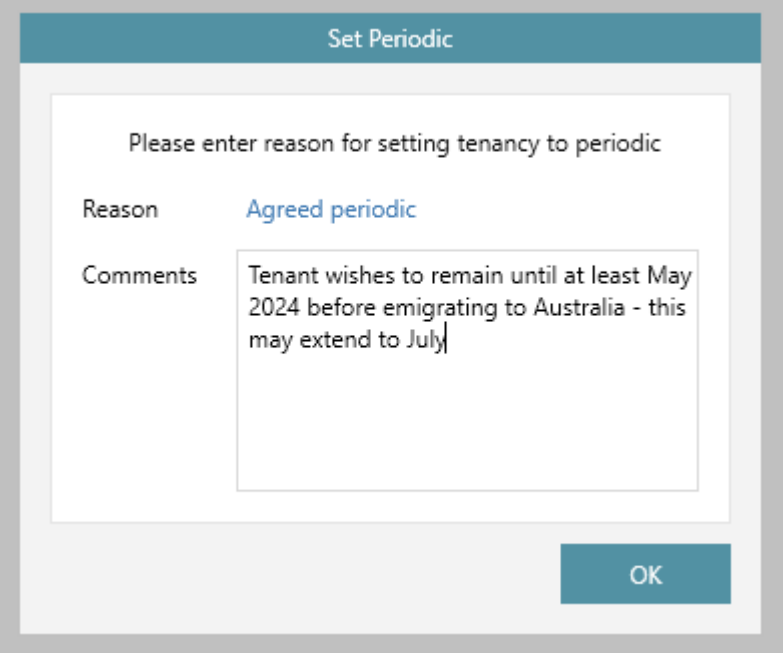
This guide has been reviewed against our global client base and classed as relevant to all regions

A configuration option is available that allows a periodic tenancy reason & notes to be added when marking a tenancy as periodic - the relevant reason is selected from a predefined list plus more detailed notes can also be added

Making a tenancy periodic can be done from the tenancy record and also from a tenancy renewal - in both cases, when marking the tenancy as periodic, selecting a reason/adding notes will be required

When requesting for this feature to be enabled via Reapit Support (see link below), you will need to supply the required periodic tenancy reasons, as they are set-up to meet the requirements of your business

To enable this configuration option, contact Reapit Support

<p>1. Make tenancy periodic</p> <p>From tenancy:</p> <ul style="list-style-type: none">• Tick Periodic <p><i>The tenancy periodic reason screen is automatically displayed, see next step</i></p> <p>This functionality is also available from a tenancy renewal</p>	 <p>The screenshot shows a tenancy record for 'Ms P Scudamore - 17 Carlyle Court, Chelsea Harbour, SW10 0UQ - Registered 18/03/2016 - LON1'. The 'Tenancy start' date is 12/11/2018 and the 'Tenancy end' date is 30/10/2022. The 'Periodic' checkbox is checked, and the 'End confirmed' checkbox is unchecked. Other details include 'Status: Tenancy Current', 'Type: Assured Shorthold', and 'Role: Managed tenancy'.</p>
<p>2. Enter periodic tenancy reason</p> <p>Pre-set reasons will be offered - the options offered are dependent on configuration</p> <ul style="list-style-type: none">• Select Reason• Enter Comments if required• Click OK	 <p>The screenshot shows a 'Set Periodic' dialog box with the title 'Please enter reason for setting tenancy to periodic'. The 'Reason' field is set to 'Agreed periodic'. The 'Comments' field contains the text: 'Tenant wishes to remain until at least May 2024 before emigrating to Australia - this may extend to July'. An 'OK' button is visible at the bottom right.</p>

3. Reason logged in Activity Feed

The periodic tenancy reason is logged in the Activity Feed

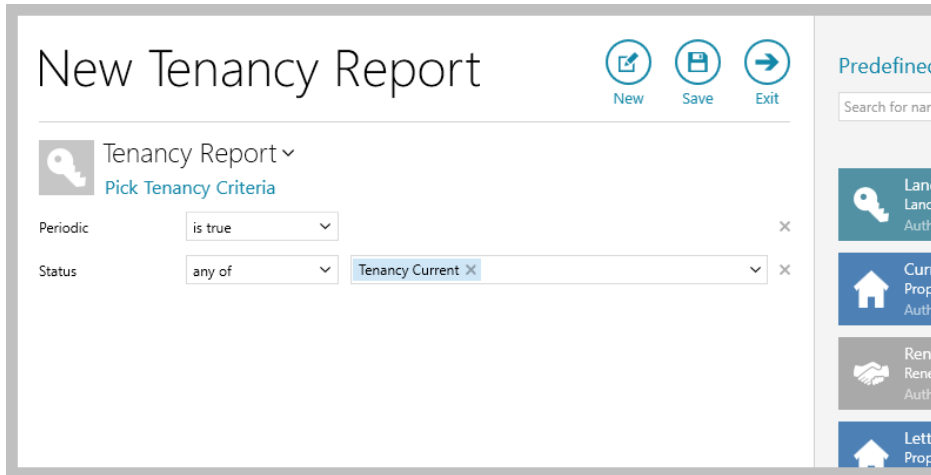
The screenshot displays a software interface for property management. At the top, a teal header bar contains the address "17 Carlyle Court, Chelsea Harbour, SW10 0UQ - Registered 18/03/2016 - LON160004". Below this is a navigation menu with tabs for "Pre-Tenancy", "Management", and "Post-Tenancy", along with utility icons for "Letters", "Print", and a save icon. The main content area is split into two columns. The left column shows tenancy details: Status is "Tenancy Current", Type is "Assured Shorthold", and Role is "Managed tenancy". The "Tenancy start" date is 12/11/2018, and the "Tenancy end" date is 30/10/2022. There are two checkboxes: "Periodic" (checked) and "End confirmed" (unchecked). The "Rent" is listed as £3,683.33 Monthly, and "Fees" include Letting: 10% and Management: 8%. The right column features an "Activity Feed" section with a search bar and a list of recent events. The most prominent event is a "Tenancy Alert: Ms Scudamore overseas until 30/09/22" dated 07/07/2022 by Kian Kettlewell. Below it is a log entry: "Periodic changed from No to Yes; Reason: Agreed periodic; Comment: Tenant Wishes To Remain Until At..." dated "A moment ago" by Kian, with a "Show more" link. A partially visible entry at the bottom reads "Tenancy alert changed from: Ms Scudamore overseas until 04/09/22".

Hovering over the **Periodic** tick box will also display the periodic tenancy reason in a tooltip

4. Periodic tenancy reasons in Power Report results grid

When running a tenancy report or renewal negotiations report, periodic tenancy reasons & comments can be seen in the results grid (but first need to be added, see **4a** below)

For example, when running a tenancy report on current tenancies that are periodic:



- The results grid displays the **Periodic reason** and **Periodic comment**
*These columns need to be added to the grid first, see **4a** below*

Property	Tenant	Status	Rent p/w	Manager	Tenancy Manager	Lld to chec	Inventory clerk	Periodic reason	Periodic comment
77 Cadogan Place, London, SW1X 9RP	Mr James Maddison	Tenancy Current	£3,500.00	Kian Kettlewe	Simon Crisp	No	Oliver Adams	Default periodic	
17 Carlyle Court, Chelsea Harbour	Ms P Scudamore and Miss	Tenancy Current	£850.00	Kian Kettlewe	Simon Crisp	No	Anna Graham	Agreed periodic	Tenant Wishes To Remain Until
76 Sloane Court East, London	Mr S Davies and Mr Simon	Tenancy Current	£900.00	Kian Kettlewe	Simon Crisp	No	Oliver Adams	Agreed periodic	Tenant Requested Flexible 3 M
Flat 8, 17 Hasker Street, Chelsea	Mr Adam Armstrong	Tenancy Current	£1,730.00	Kian Kettlewe	Patty Raynar	No	Anna Graham	Default periodic	
17 Old Church Street, Chelsea	Mr K Alonso	Tenancy Current	£2,000.00	Kian Kettlewe	Simon Crisp	No	Oliver Adams	Agreed periodic	Landlord Has Agreed To Allow
15 Rutland Gate, Knightsbridge	Mr Toby LeRone and Mrs F	Tenancy Current	£1,200.00	Kian Kettlewe	Simon Crisp	No	Anna Graham	Default periodic	

- Click to the right of the **Periodic reason** column for options to group or filter by reason, or click the column heading to sort by reason

Property	Tenant	Status	Rent p/w	Manager	Tenancy Manager	Lld to chec	Inventory clerk	Periodic reason	Periodic comment
77 Cadogan Place, London, SW1X 9RP	Mr James Maddison	Tenancy Current	£3,500.00	Kian Kettlewe	Simon Crisp	No	Oliver Adams	Default periodic	
17 Carlyle Court, Chelsea Harbour	Ms P Scudamore and Miss	Tenancy Current	£850.00	Kian Kettlewe	Simon Crisp	No	Anna Graham	Agreed periodic	Tenant Wishes To Remain Until
76 Sloane Court East, London	Mr S Davies and Mr Simon	Tenancy Current	£900.00	Kian Kettlewe	Simon Crisp	No	Oliver Adams	Agreed periodic	Tenant Requested Flexible 3 M
Flat 8, 17 Hasker Street, Chelsea	Mr Adam Armstrong	Tenancy Current	£1,730.00	Kian Kettlewe	Patty Raynar	No	Anna Graham	Default periodic	
17 Old Church Street, Chelsea	Mr K Alonso	Tenancy Current	£2,000.00	Kian Kettlewe	Simon Crisp	No	Oliver Adams	Agreed periodic	Landlord Has Agreed To Allow
15 Rutland Gate, Knightsbridge	Mr Toby LeRone and Mrs F	Tenancy Current	£1,200.00	Kian Kettlewe	Simon Crisp	No	Anna Graham	Default periodic	

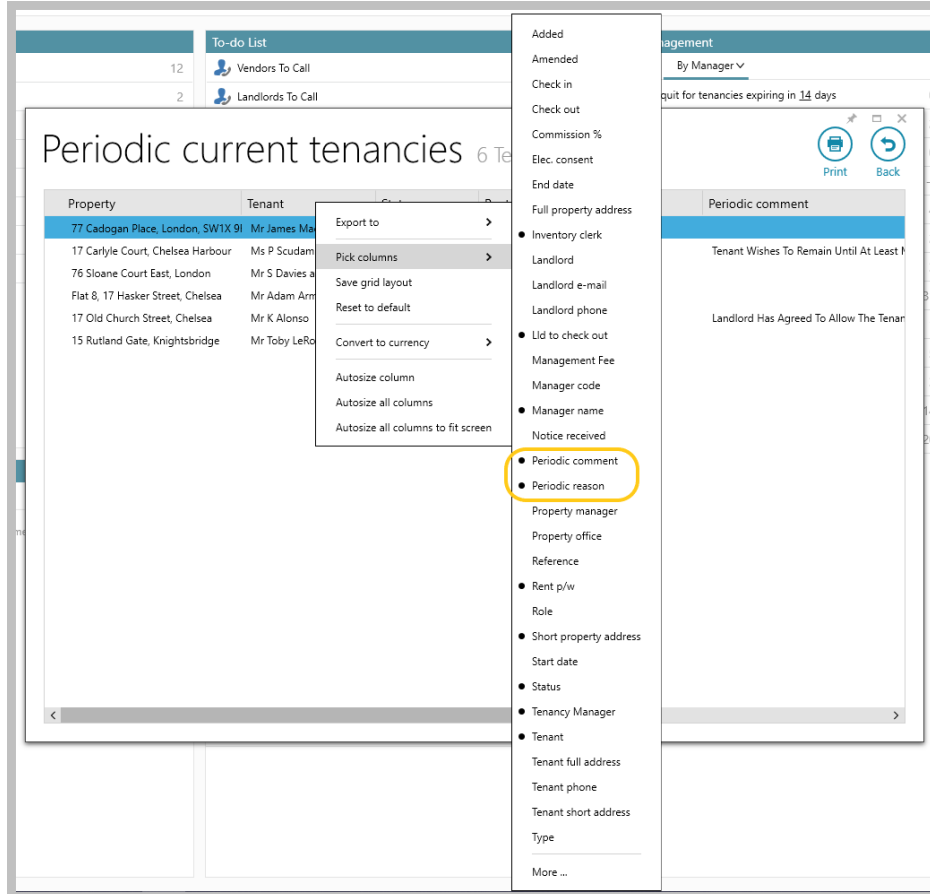
For more information on building and using Power Reports, see Knowledge Base

The Knowledge Base also provides access to the Power Reports library - this library contains 70+ commonly used Power Reports saved as .rrd files which you can download and import into AgencyCloud - making building Power Reports quicker & easier

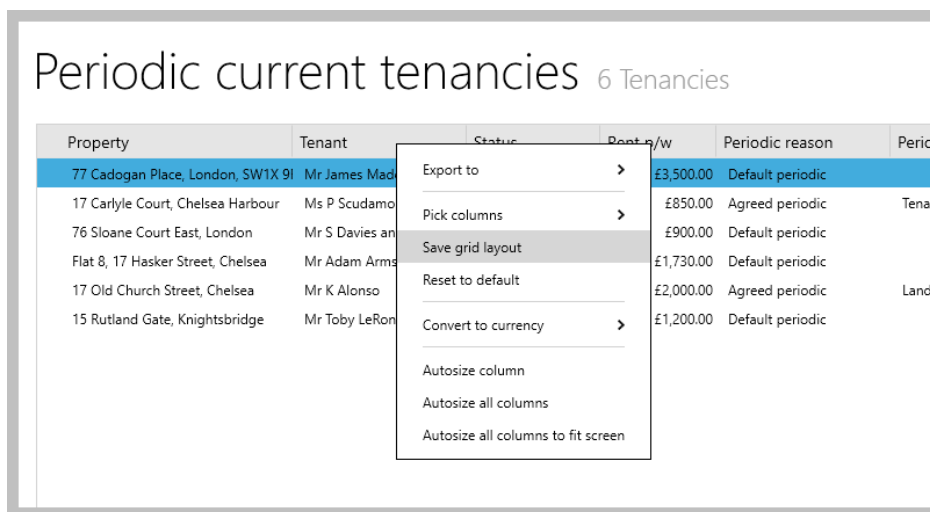
4a. Add reason & comment columns to grid

Once added and saved, both columns will always be displayed on a tenancy report grid

- Right-click over the column heading and select **Periodic comment & Periodic reason**



- New columns are added to the right of the grid, click and drag to reposition
- Right-click column headings again and select **Save grid layout**



Safety certificate due to expire linked to works order

This guide has been reviewed against our global client base and classed as relevant to all regions

When a safety certificate is due to expire and a new works order is booked (to renew the certificate), a link is created between the expired certificate and the works order - information about the expired certificate is added to the works order

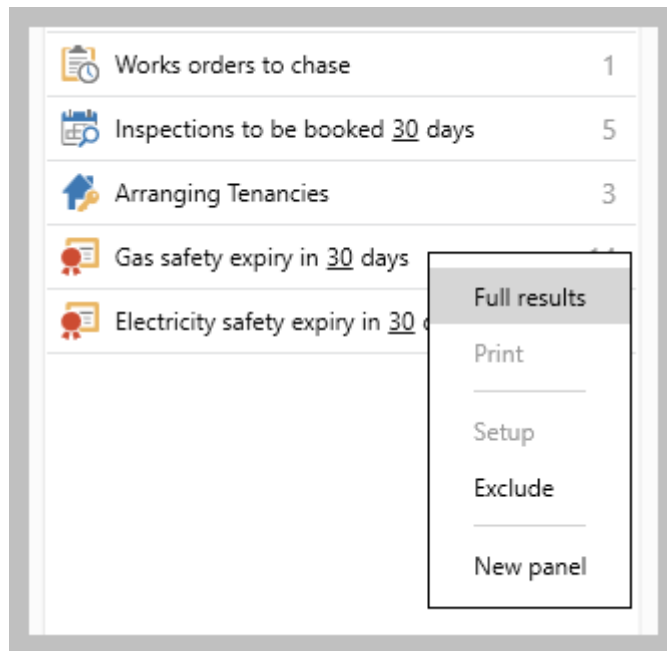
This feature is not available when Bulk-booked works orders use default 'Required By' date - configuration option is in use (for guide, see Knowledge Base)

1. Access list of certificates due to expire

From Organiser, Property Management panel:

- Right-click over the relevant list e.g. **Gas safety expiry in xx days**
- Click **Full results**

The certificates due to expire will be shown in a grid, see next step



2. Book safety inspection(s) - as usual

Follow the usual process to book safety inspections (for guide, see Knowledge Base)

Tick beside the properties to book safety inspections for
This can be done for individual or multiple properties

- Click **Book Gas Safety Inspections**

Book Gas Safety Inspections - 3 of 14 selected					
Book Gas Safety Inspections					
<input type="checkbox"/>	Address	Landlord	Certificate Expiry	Landlord Phone	Certificate Manag
<input checked="" type="checkbox"/>	87 Bridgeman House, Kensington	Miss Sophie Devereaux	07/03/2022	h: 020 7946 0631; m: 07700 90...	Landlord
<input checked="" type="checkbox"/>	14 Oakley House, 103 Sloane Street	Miss N Meyler	31/01/2021	m: 07567857658; e: meylern@...	Landlord
<input checked="" type="checkbox"/>	Flat 5, 17 Hans Crescent	Mr Ken Xiao	05/07/2022	Mobile When in UK: 07700 90...	Landlord
<input type="checkbox"/>	27 Cadogan Gardens, London	Mr J Tizzard	09/05/2022	m: 07896789767; e: inatizz@tg...	Landlord
<input type="checkbox"/>	14 Kingston House South	Miss S Rockafella	10/02/2022	m: 07898657898; e: rock@mix...	Landlord
<input type="checkbox"/>	11 Edith Terrace, London.	Miss R Biesty	29/04/2021	m: 077234576; e: rach@b13.co...	Agent

A certificate needs to have a date in the **Certificate Expiry** column above in order for the link between the expired certificate and new works order to be created (as seen in step 3)

3. Link created on works order

Providing the previous certificate had an expiry date, works orders created using the process above will have a note added to the **Instructions** panel on the new works order that reads:

- **Created from a certificate with an expiry date of dd/mm/yyyy**

Works Order (LON22000011)

Documents

Print

Works Order

Status: Raised

Work Type: Gas Safety

Reported By: Select ...

Booked By: Kian Kettlewell

Priority: Select ...

Booked On: 28/07/2022

Required By: 31/01/2021

Completed: / /

Post invoice to accounts ...

Contractor: Safe Gas Ltd

Mobile: Not added

Home: Not added

Business: 020 7456 4578

Activity Feed

Type to filter activity

No activity to display

Works Details

Work Title: Gas Safety Inspection

Net Cost: £150.00

VAT: £0.00

Our estimate: £0.00

Charge to: Tenant, Landlord, Hold Reserve Funds

Account: Select ...

Description

Property

14 Oakley House, 103 Sloane Street, Knightsbridge, SW1X 9F

Landlord: Miss N Meyler

Mobile: 07567857658

Home: Not added

E-mail: meylem@meymail.com

Tenant: Select ...

Access Arrangements: v

Instructions

Created from a certificate with an expiry date of 31/01/2021

Landlord approval required over: £0.00

Float held: £0.00

Landlord notes: Client requests contact for all new works asap - use mobile, anytime

Property notes: British Gas cover

Attached checklist documents available in letters screen

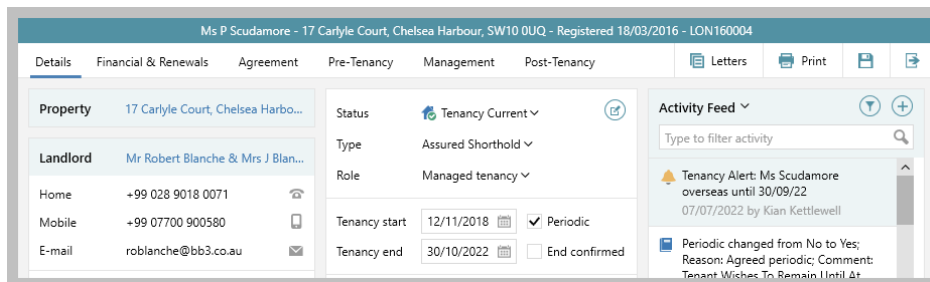
This guide has been reviewed against our global client base and classed as relevant to all regions

Documents that have been attached as part of a checklist can be seen in the letters screen on a tenancy and property - this includes documents attached to pre & post tenancy checks and pre-instruction checks

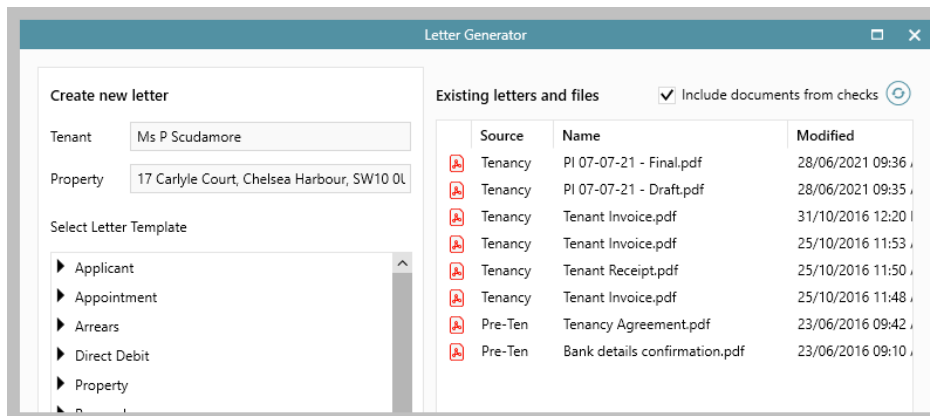
Tenancy letters

From tenancy:

- Click **Letters** (top right)



- Tick **Include documents from checks**



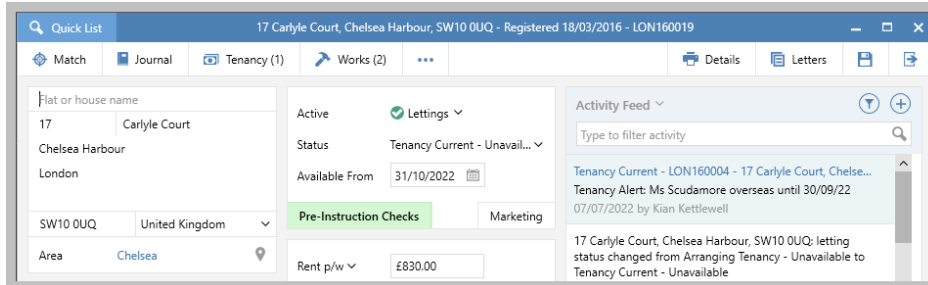
- **Source** column indicates where the letter/document originates
In the example above:
 - **Tenancy** indicates document is usually stored in tenancy letters
 - **Pre-Ten** indicates document also stored in pre-tenancy checklist

For information on pre/post-tenancy checks, see Knowledge Base

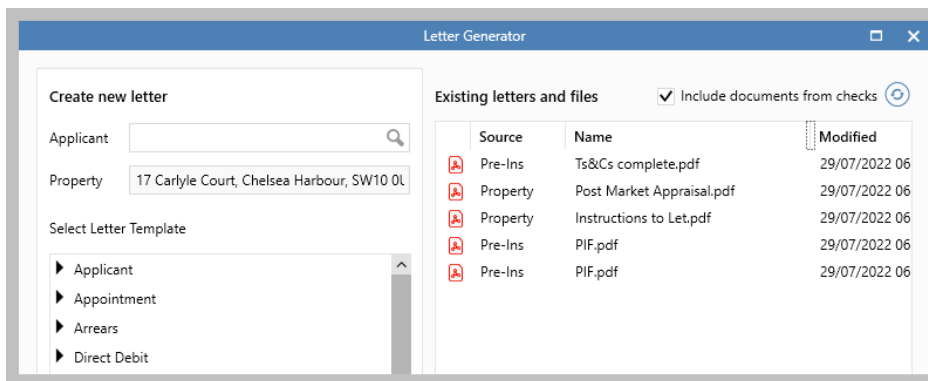
Property letters

From property:

- Click **Letters** (top right)



- Tick **Include documents from checks**



- **Source** column indicates where the letter/document originates
In the example above:
 - **Property** indicates document is usually stored in property letters
 - **Pre-Ins** indicates document also stored in pre-instruction checklist

For information on pre-instruction check functionality, see Knowledge Base