

Reapit AgencyCloud 12.154 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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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

New UI round-up: v12.154

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 12.154 to bring it in line with previously redesigned screens

All existing functionality exists but with a refreshed look and feel

Offers and pipeline report criteria

The offers and pipeline report criteria screen now uses the new UI format

From main menu:

- Click **Reports** then click **MI Analysis** and select **Offers & Pipeline Reports**
- The screen displayed uses the new UI format

The screenshot shows a window titled "Offer Reporting" with a close button (X) in the top right corner. The window contains the following elements:

- Report:** Radio buttons for "Offer Report" (selected) and "Pipeline Report".
- Include Archive:** A checkbox that is currently unchecked.
- Sort Order:** A text input field with a "Grouping and sort order ..." link to its right.
- Filters:** A list of filter categories, each with a checkbox and a corresponding input field:
 - Dates:** Two date pickers (// and //) with a "to" separator.
 - Expected exchange:** Two date pickers (// and //) with a "to" separator.
 - Expected completion:** Two date pickers (// and //) with a "to" separator.
 - Price:** Two currency input fields (£0 and £0) with a "to" separator.
 - Status:** A dropdown menu with the text "Select one or more status ...".
 - Property:** A dropdown menu with the text "For Sale - Available, For Sale - Unavailable, Sold STC - Availa" and "Select one or more status ...".
 - Office:** A dropdown menu with the text "Select one or more office ...".
 - Negotiator:** A dropdown menu with the text "Select negotiator/manager ...".
 - Extra:** A large text area with the text "Select further report criteria ...".
- Report:** A blue button in the bottom right corner.

For more information on running offer or pipeline reports, see Knowledge Base

Sales & lettings/rentals

Add offer from viewing appointment screen

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

When an applicant who has viewed a property wants to submit an offer, the new offer can be added from the relevant viewing appointment screen - this allows an offer to be submitted at the point of taking viewing feedback from an applicant

The new offer is automatically added to the relevant property offers screen as a pending offer

In AgencyCloud 12.154, this can be done for a sales property viewing appointment
From AgencyCloud 12.155, this functionality will also be available for a lettings property viewing

1. Add new offer from viewing appointment

From the viewing appointment:

- Click **New Offer** (top left)

The screenshot shows the 'Diary' interface in AgencyCloud. At the top, there is a purple header with the word 'Diary'. Below the header, there are two main sections: a form on the left and a property details panel on the right.

Form Section (Left):

- Buttons: '+ Add Another', 'New Offer' (highlighted), 'Print', 'Save', 'Share'.
- Entry Date: 07/09/2022 (with calendar icon), From: 10:30, To: 11:30.
- Recur every: 0, Until: / / (with calendar icon).
- Entry Type: Viewing (dropdown), Virtual (checkbox).
- Text area: 'Enter entry comments'.
- Accompanied: Kian Kettlewell (checkbox checked), Other Agent (checkbox unchecked), + Negotiators/Offices (checkbox checked), Confirmed (checkbox checked).
- Cancelled (checkbox unchecked), Repeat (checkbox unchecked), All Confirmed (checkbox checked).
- Follow Up: 08/09/2022 (checkbox checked), Followed Up (checkbox unchecked).
- Text area: 'Enter follow up notes'.

Property Details Panel (Right):

- Property: LON140002 (with search icon), Confirmed (checkbox checked), Followed Up (checkbox unchecked).
- Address: 17 Old Church Street, Chelsea, SW3 6EP (with location and edit icons).
- Image: A photograph of a brick building.
- Vendor: Mrs C Lampard (with expand/collapse arrow), Mobile: 07890 567898, Home: 020 987 8968 (with mobile and home phone icons).
- Applicant: LON140003 (with search icon), Confirmed (checkbox checked), Followed Up (checkbox unchecked).
- Applicant Name: Mr L Abbott (with edit icon).
- Applicant Mobile: Not added.
- Applicant Home: 07776 248380 (with mobile icon).
- Applicant Details: £5,000,000 to £7,000,000, General, Selling with other agent, Pending Own Sale, To Live In (with expand/collapse arrow).

When a property & applicant are added to a viewing appointment & the appointment is saved, the New Offer button is made available

2. Complete offer details

The usual offer wizard screens will be displayed

- Select offer type, click **Next**
- Enter offer amount, click **Finish**

The offer is added for the applicant who viewed the property (as entered onto the viewing appointment screen)

Add New Offer

Offer
 Reservation
 Note of Interest

Cancel Next

Add New Offer

Amount £5m

Negotiator Kian Kettlewell

Made By Mr L Abbott

Cancel Finish

3. New offer details added

The property offers screen is automatically opened and the offer is added as a **Pending** offer

Offers

Property Status For Sale - Available ▾ Offers & Reservations Buyer & Sales Details Invoice Letters

Buyers	Price	Status	Negotiator	Date
Mr L Abbott (applicant)	£5,000,000	Offer Pending	Kian Kettlewell	07/09/2022

Activity Feed
Type to filter activity

No activity to display

Status Pending Include in Pipeline

Negotiator Kian Kettlewell

Amount £5,000,000 91%

Date 07/09/2022

Exchange Due / /

Vendor Solicitor Select ...

Applicant Solicitor Select ...

Options

- Memorandum of sale
- Sales Progress
- Chain

For more information on adding/updating/rejecting/withdrawing offers, see Knowledge Base

Only show offer notes for selected offers - configuration option

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

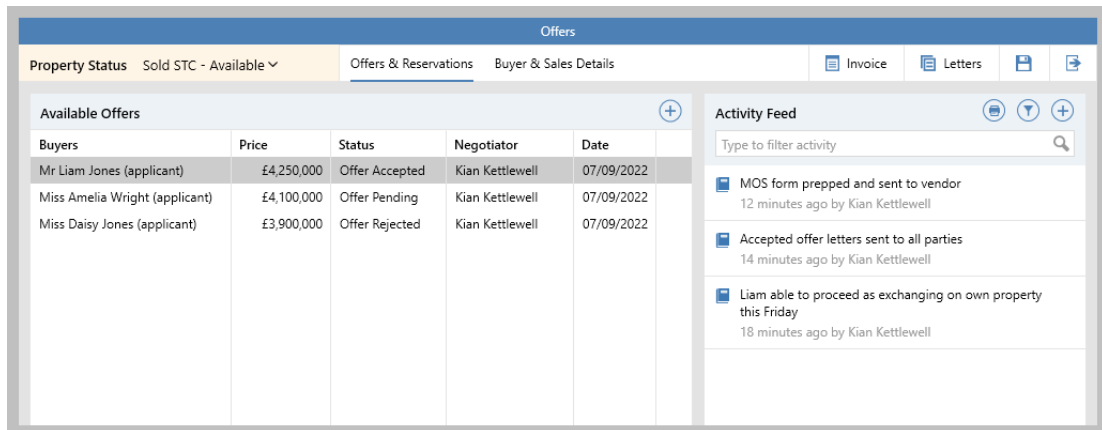
A configuration option is available which means that offer notes for the currently selected offer only will be displayed by default when viewing the offers screen

When required, the filter can be deselected to show all offer notes for the current property, along with the general offers notes for the property (general offer notes are not shown when using this configuration option until the filter is deselected)

To enable this configuration option, contact Reapit Support

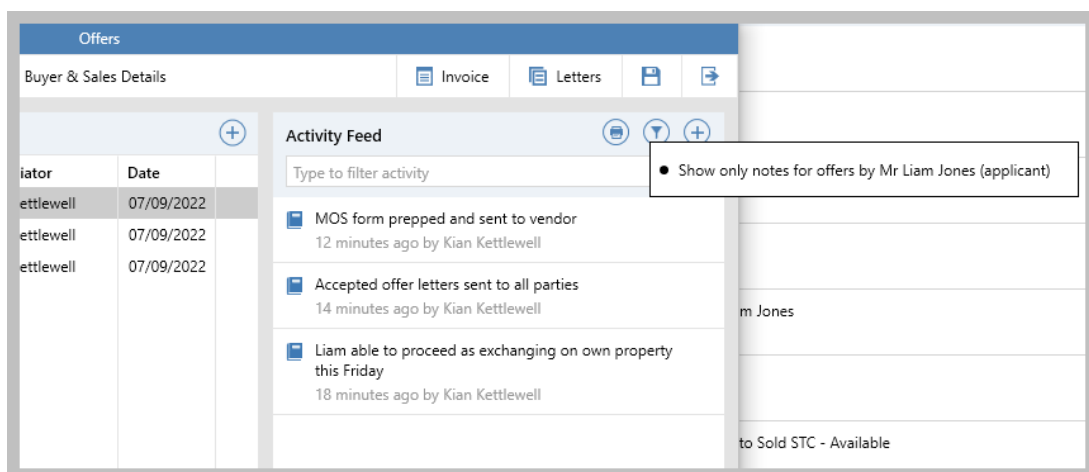
From property, click **Offers**:

- The default view is to only show offer notes for the currently selected offer (in this example, just notes for the offer from Mr Liam Jones are shown)
- Clicking any of the other offers on the left will then show the notes for the selected offer instead



To view all offer notes (including general offer notes):

- Click **filter** icon and click **Show only notes for offers by...**



- This deselects the filter and shows all offer notes (including general notes, previously not shown)

Offers

Property Status
Sold STC - Available ▾

Offers & Reservations
Buyer & Sales Details

Invoice
Letters
📄
🔗

Available Offers +

Buyers	Price	Status	Negotiator	Date
Mr Liam Jones (applicant)	£4,250,000	Offer Accepted	Kian Kettlewell	07/09/2022
Miss Amelia Wright (applicant)	£4,100,000	Offer Pending	Kian Kettlewell	07/09/2022
Miss Daisy Jones (applicant)	£3,900,000	Offer Rejected	Kian Kettlewell	07/09/2022

Activity Feed 🗨️ ⌵ +

- Offers must be in region of £4.2m
A moment ago by Kian Kettlewell
- MOS form prepped and sent to vendor
14 minutes ago by Kian Kettlewell
- Accepted offer letters sent to all parties
17 minutes ago by Kian Kettlewell
- Miss Wright informed that offer needs to be in the region of £4.2m - not willing to up offer at this stage
17 minutes ago by Kian Kettlewell
- Able to proceed - Miss Jones informed that offer needs to be in region of £4.2m
19 minutes ago by Kian Kettlewell
- Offer taken, but currently not able to confirm whether able to proceed until offer on her flat has been confirmed
20 minutes ago by Kian Kettlewell
- Liam able to proceed as exchanging on own property this Friday
21 minutes ago by Kian Kettlewell

Status Accepted Include in Pipeline

Negotiator Kian Kettlewell

Amount

Date 📅

Exchange Due 📅

Vendor Solicitor Archstone Solicitors, Stratford

Applicant Solicitor Colemans, Manchester

Options

- 📄 Memorandum of sale
- 📊 Sales Progress
- 🔗 Chain

Power Reports for works orders - further enhancements

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

The ability to run Power Reports on works orders was introduced in AgencyCloud 12.153 (see Release Notes)

In AgencyCloud 12.154, further enhancements have been made:

- Works order criteria can be added to property, tenancy & company Power Reports
- Works order Power Reports can be added to a panel on the Organiser

For more information on building Power Reports, see Knowledge Base

Works order criteria can be added to property, tenancy & company Power Reports

The report type selected determines both the report criteria options offered & the how the results are displayed - i.e. a property report for works orders will return properties, a tenancy report will return tenancies & a company report will return companies (or suppliers)

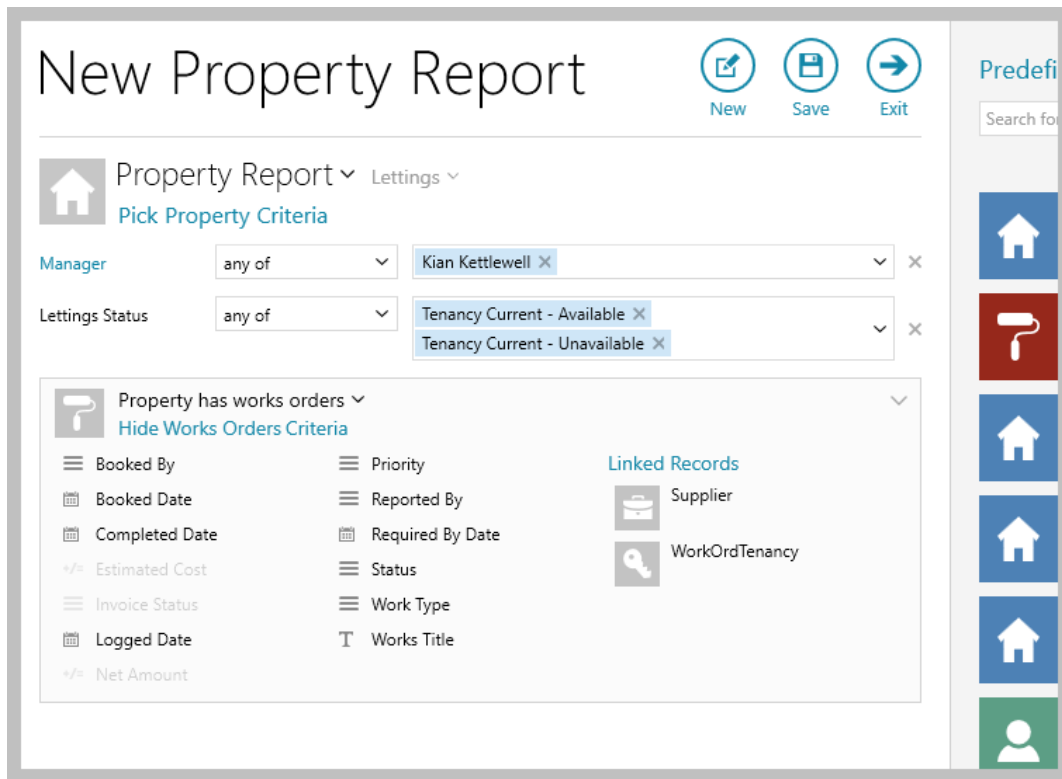
From Power Reports:

- Select report type of **property** (lettings), **tenancy** or **company**
- Build property/tenancy/company criteria

From **Linked Records**, select **Works Orders**

- Works order criteria will be displayed - click **Pick Works Orders Criteria** to display criteria options

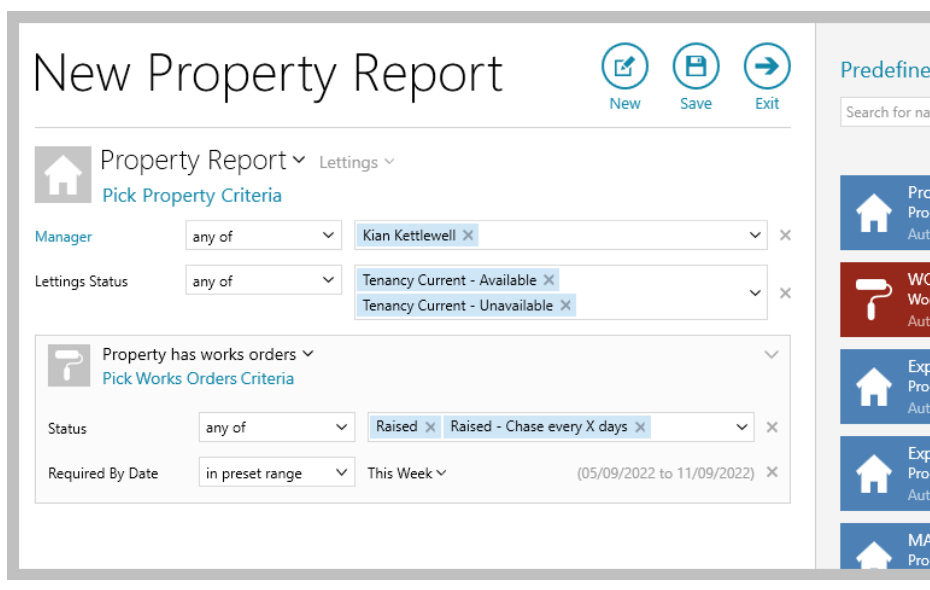
The example shown is for a property report, although the same criteria options are offered when choosing to report on works orders from a tenancy or company report



Greyed out criteria options are currently not available to report on
If you need to report on these options, run a Works Order report instead

Example property report - reporting on works orders

This report will return all properties with current tenancies, for a specific property manager, with outstanding works orders due to be completed this week

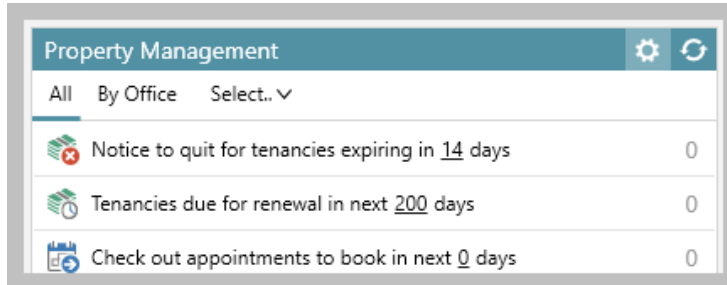


Works order Power Reports can be added to a panel on the Organiser

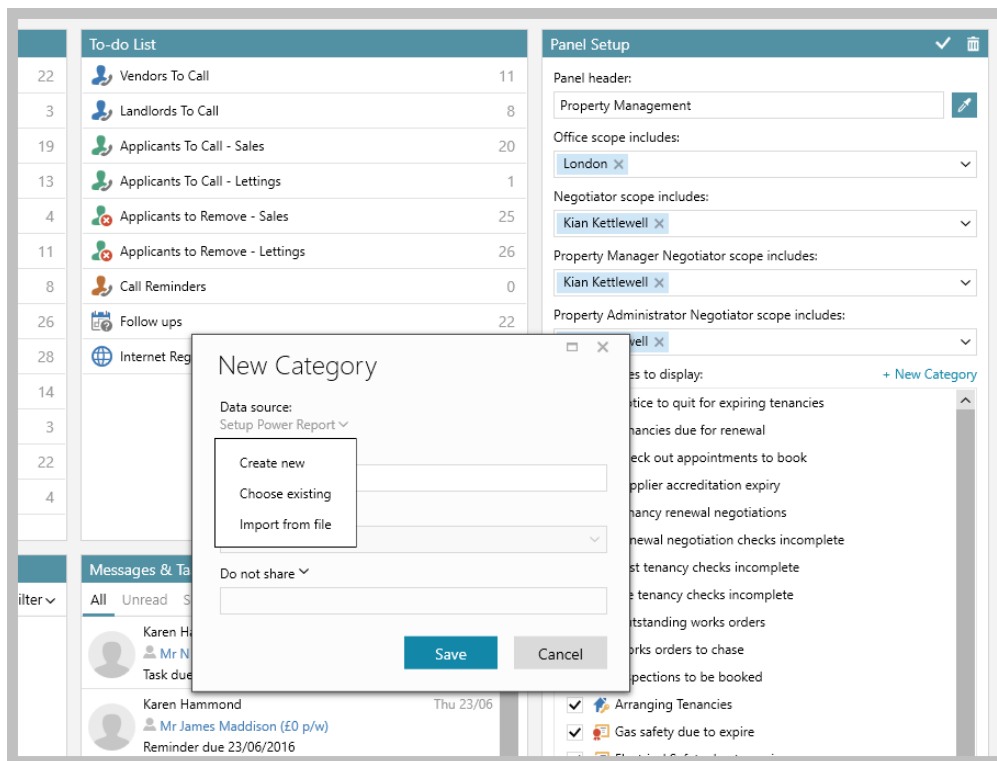
A works order report can be added to a panel on the Organiser - a new or pre-saved report can be added

From Organiser panel you wish to add works order report to:

- Hover over panel header and click **cog** icon to access **Panel Setup**



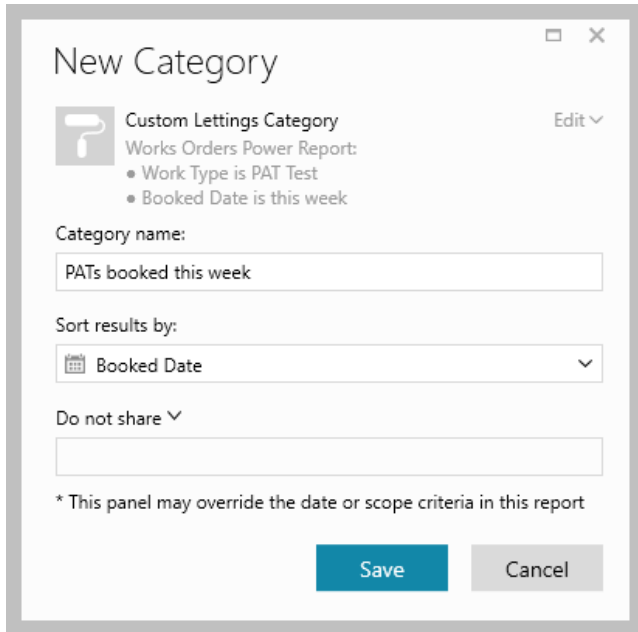
- From **Pick categories to display** section, click **+ New Category**



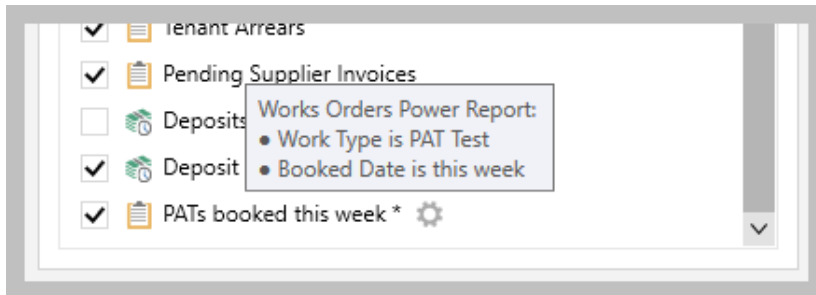
- Click **Setup Power Report** for options to:
 - **Create new** - build a new Works Order Power Report
 - **Choose existing** - pick an existing saved Works Order Power Report
 - **Import from file** - if you have been supplied with a Works Order Power Report file (.rrd file), this can be imported from here

For more information on adding new categories to the Organiser, see Knowledge Base

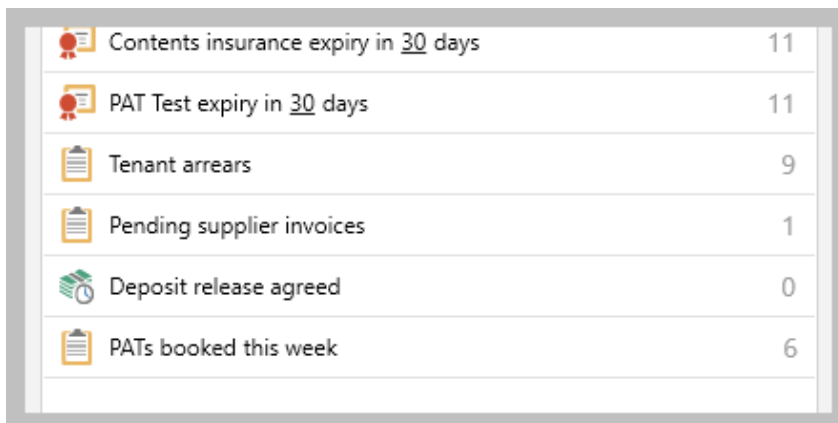
- Ensure **Category name** is entered plus sorting and sharing options are set-up as required, click **Save**



- The new category will be added to the bottom the **Pick categories to display** section - **tick** to enable
The asterisk () indicates a custom user-added category*



- Hovering over the category displays a summary of it, along with a cog icon to the right which allows the category to be edited or deleted
- Click the tick (top right of panel header) to save the panel setup - the new category is displayed at the bottom of the panel



Contents insurance expiry in 30 days	11
PAT Test expiry in 30 days	11
Tenant arrears	9
Pending supplier invoices	1
Deposit release agreed	0
PATs booked this week	6

Details of incomplete renewal negotiation checks shown in Property Management panel

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

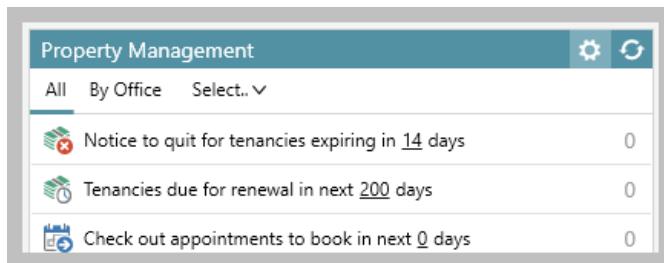
Information on renewal negotiations with incomplete renewal negotiation checks can be accessed via the Property Management panel on the Organiser

1. Add renewal negotiation checks incomplete option to Organiser - Property Management panel

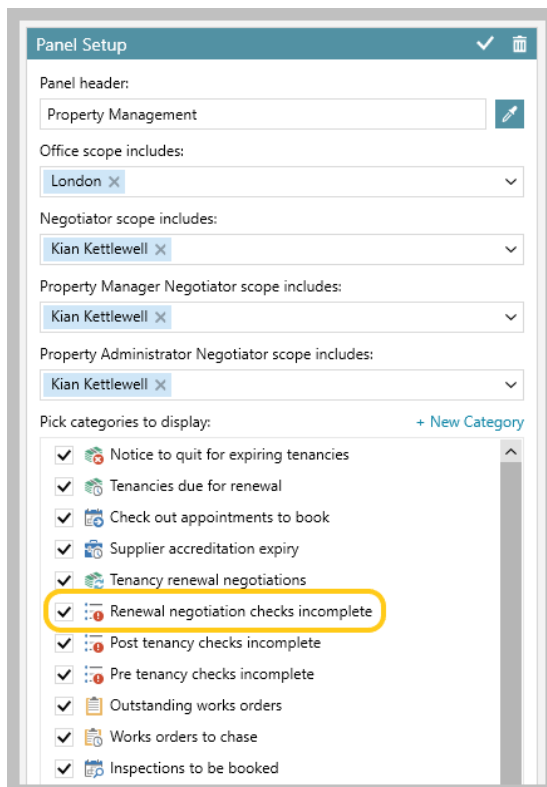
The renewal negotiation checks incomplete option first needs to be added to the Property Management panel via Panel Setup

From Property Management panel:

- Hover over panel header and click **cog** icon to access **Panel Setup**



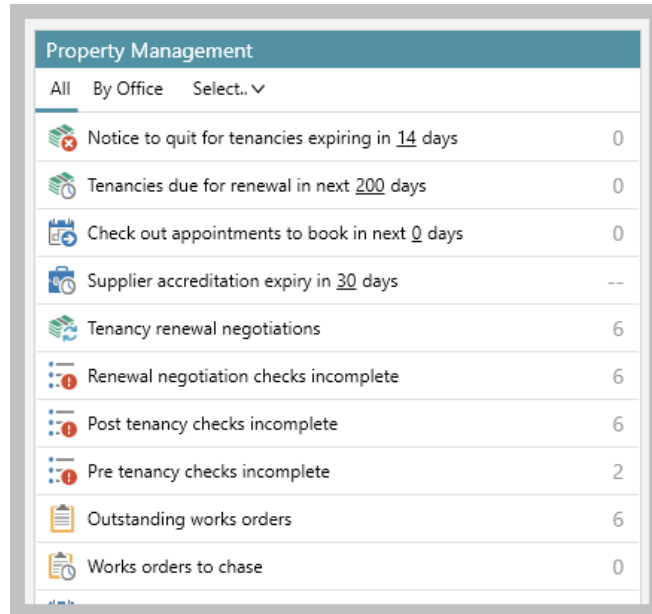
- From **Pick categories to display** section, tick **Renewal negotiation checks incomplete**



- Click **tick** (top right) to save

2. View renewal negotiation checks incomplete information on Property Management panel

- The **Renewal negotiation checks incomplete** option is added to the Property Management panel



The screenshot shows a 'Property Management' dashboard with a list of metrics. The metrics are as follows:

Metric	Count
Notice to quit for tenancies expiring in 14 days	0
Tenancies due for renewal in next 200 days	0
Check out appointments to book in next 0 days	0
Supplier accreditation expiry in 30 days	--
Tenancy renewal negotiations	6
Renewal negotiation checks incomplete	6
Post tenancy checks incomplete	6
Pre tenancy checks incomplete	2
Outstanding works orders	6
Works orders to chase	0

3. Accessing renewal negotiations with outstanding checks

Renewal negotiation information can be viewed within the Organiser panel or within a grid

View renewal negotiations within the Organiser panel

- Click **Renewal negotiation checks incomplete**
- A list of the renewals is shown - click **Renewal** to view the renewal negotiation

← Renewal negotiation checks incomplete (6)

Renewal for 77 Glynde Mews, Walton Street, SW3 1AB proposed to start 02/11/2016 at £2,100 p/w
 🏠 Mr S Ridout Agreement sent 25/10/2016
 👤 Mrs Helen Parr Agreement sent 25/10/2016

Renewal for 77 Cadogan Place, London, SW1X 9RP proposed to start 23/12/2016 at £3,500 p/w
 🏠 Mr Adam Armstrong Pending agreement 25/08/2022
 👤 Mr James Maddison Pending agreement (References received) 25/08/2022

Renewal for 15 Rutland Gate, Knightsbridge, SW7 1BH proposed to start 14/09/2019 at £1,200 p/w
 🏠 Mrs Gina Bellman Letter not sent
 👤 Ms Carrie O'Key Letter not sent

Renewal for 1 Juniper Drive, London, SW18 1AY proposed to start 12/03/2020 at £900 p/w
 🏠 Mr Aldis Hodge Letter not sent
 👤 Mr M Barnes Letter not sent

Renewal for The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH proposed to start 15/05/2018 at £800 p/w
 🏠 Mr Gerald Downey Pending agreement 25/08/2022
 👤 Mr Steve Vai Awaiting references 25/08/2022

Renewal for 17 Carlyle Court, Chelsea Harbour, SW10 0UQ proposed to start 12/11/2019 at £830 p/w
 🏠 Mr Robert Blanche Pending agreement 01/09/2022
 👤 Ms P Scudamore Awaiting references 01/09/2022

View renewal negotiations in a grid

- Right-click over **Renewal negotiation checks incomplete** & select **Full results**
- The renewal negotiations are shown in a grid - double-click to view the renewal negotiation
- A **Checks** column can be added to the grid - see step 4

↑ Property	Tenant	Ten Upd	Ten Upd Da...	Landlord	Lid Upd	Lid Upd D...	New Re
77 Cadogan Place, London, SW1X...	Mr James Maddison	Pending agree...	25/08/2022	Mr Adam Armstro...	Pending agree...	25/08/2022	£15,20
17 Carlyle Court, Chelsea Harbour	Ms P Scudamore	Awaiting refer...	01/09/2022	Mr Robert Blanche	Pending agree...	01/09/2022	£3,60
77 Glynde Mews, Walton Street	Mrs Helen Parr	Agreement sent	25/10/2016	Mr S Ridout	Agreement sent	25/10/2016	£9
1 Juniper Drive, London, SW18 1AY	Mr M Barnes and...	Not sent	12/08/2022	Mr Aldis Hodge	Not sent	12/08/2022	£3,91
The Garden Flat	Mr Steve Vai	Awaiting refer...	25/08/2022	Mr Gerald Downey	Pending agree...	25/08/2022	£3,47
15 Rutland Gate, Knightsbridge	Ms Carrie O'Key a...	Pending refere...	08/09/2022	Mrs Gina Bellman	Pending agree...	08/09/2022	£5,21

Filters: Days since last update

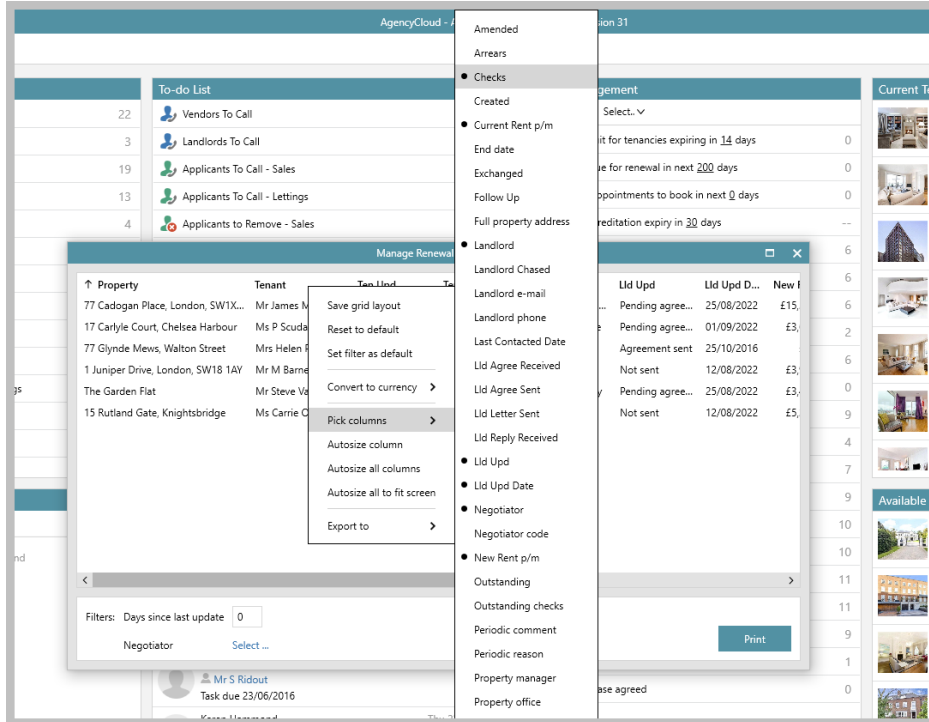
Negotiator

Print

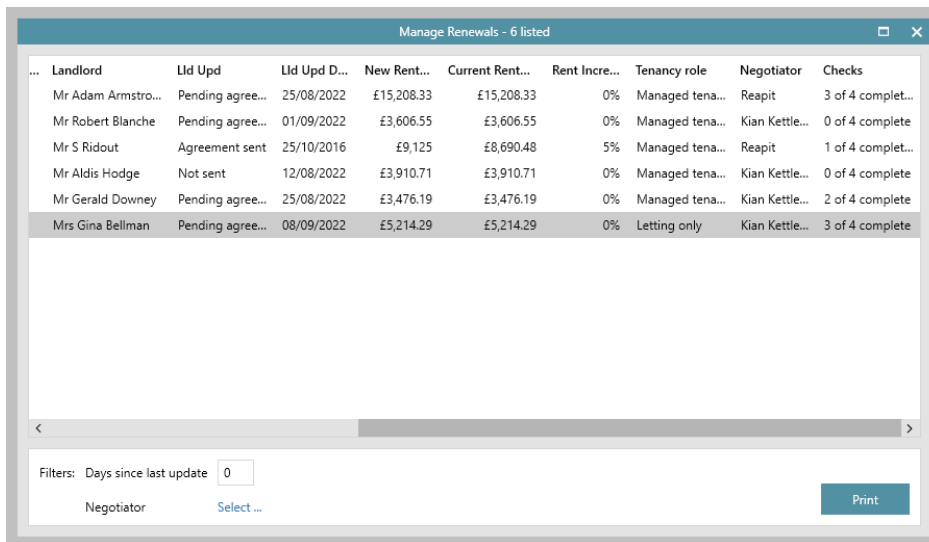
4. Add checks column to grid & save

Add the checks column & save the grid layout to ensure the column shows on any renewals grids

- Right-click over the column headings, select **Pick columns** and click **Checks**



- The **Checks** column is added to the far right of the grid



- Click and drag the column to the desired location, then right-click the column headings again and select **Save grid layout**
- Grid functions can be used:
 - Click the column heading to sort by that column
 - Click to the right of the column heading to filter by column content

Lettings MI Analysis dashboards available

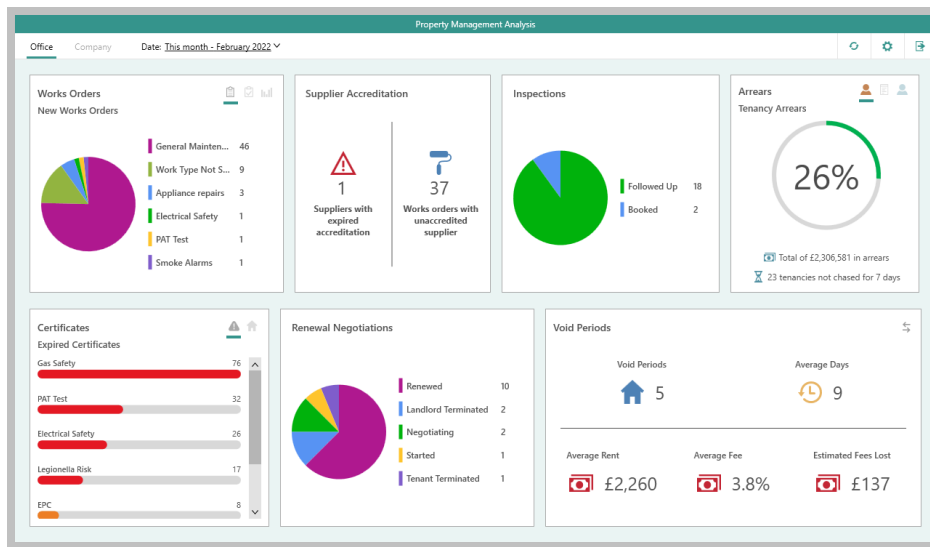
This guide has been reviewed against our global client base and classed as relevant to all regions

From AgencyCloud 12.154+, four new Lettings MI Analysis dashboards are available

Each dashboard is summarised below – full guides on each dashboard are available on the Knowledge Base

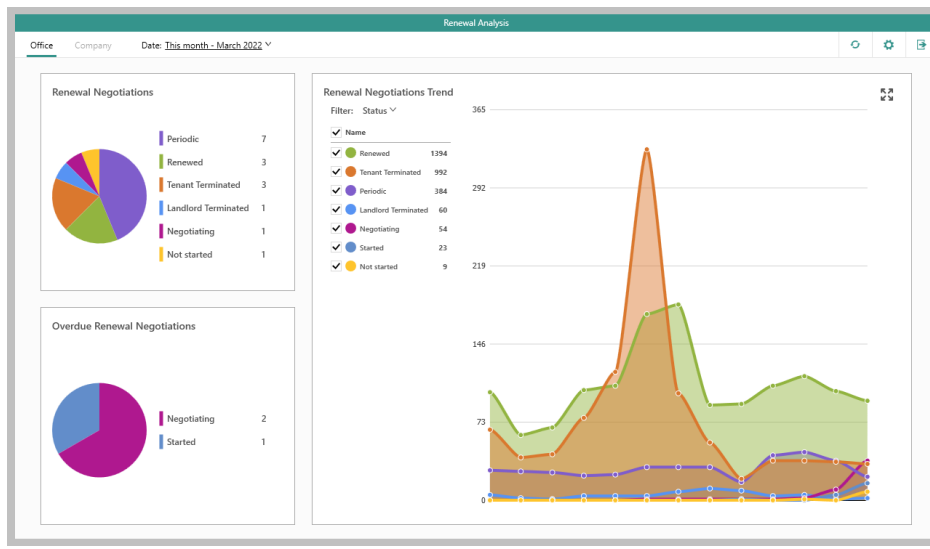
Property Management Analysis

The Property Management Analysis dashboard offers includes real-time information on current/completed works orders, expired supplier accreditations, inspections booked/followed up, tenancies in arrears, expired certificates, renewal status and void periods



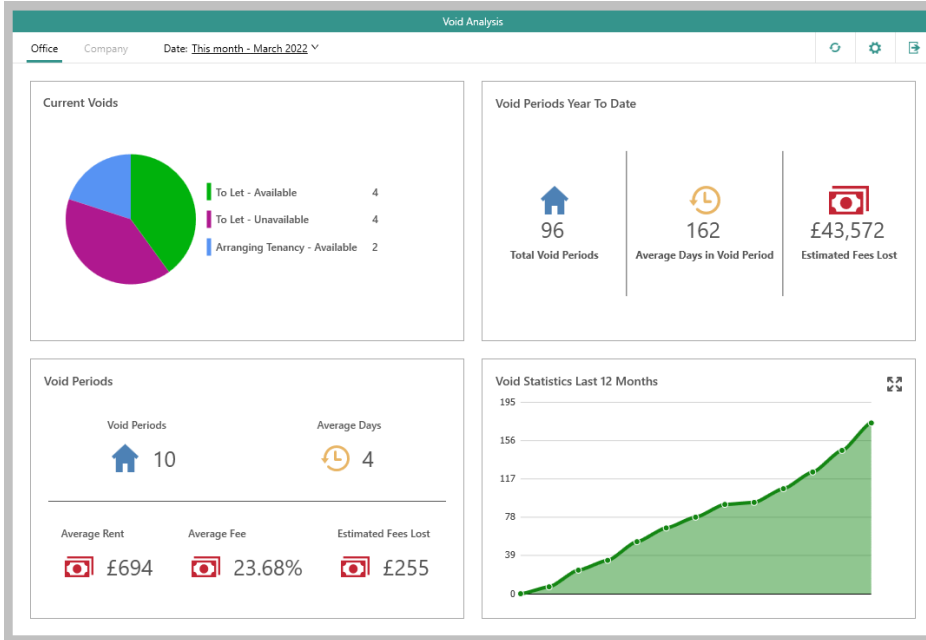
Renewal Analysis

The Renewal Analysis dashboard offers includes real-time information on current negotiations due by status plus overdue negotiations and monthly negotiations for the year-to-date by status and by office



Void Analysis

The Void Analysis dashboard offers real-time information on void data - including current voids by property status, figures for average number of days and rent/fees lost, plus estimated total fees lost



Pipeline (Lettings MI)

The Lettings Pipeline dashboard shows numbers of arranging tenancies and/or pending offers, including figures on average rent and total fees - current or projected pipeline figures can be shown

The Pipeline Report provides a detailed breakdown of the current pipeline, categorized by scope and type of offer.

Scope	Pending Offers				Arranging Tenancies			
	Count	Av Monthly Rent	Addl. Fee	Calc. Fees	Count	Av Monthly Rent	Addl. Fee	Calc. Fees
...	2	£425	£0	£595	0	£0	£0	£0
...	0	£0	£0	£0	0	£0	£0	£0
...	4	£646	£0	£0	1	£500	£0	£8,400
...	2	£625	£0	£0	0	£0	£0	£0
...	2	£425	£0	£595	0	£0	£0	£0
TOTAL	76	£871	£0	£31,980	11	£669	£0	£66,145

Import and attach documents in bulk via document importer - configuration option

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

A configuration option is available which allows PDF documents to be imported in bulk and attached to works order supplier invoices, property inspections* & certificates* via one central document importer screen

To enable this configuration option, contact Reapit Support

** Property inspection & certificate documents can only be uploaded when using advanced property inspection functionality - however, from AgencyCloud 12.155 it will be possible for all users to upload certificate documents*

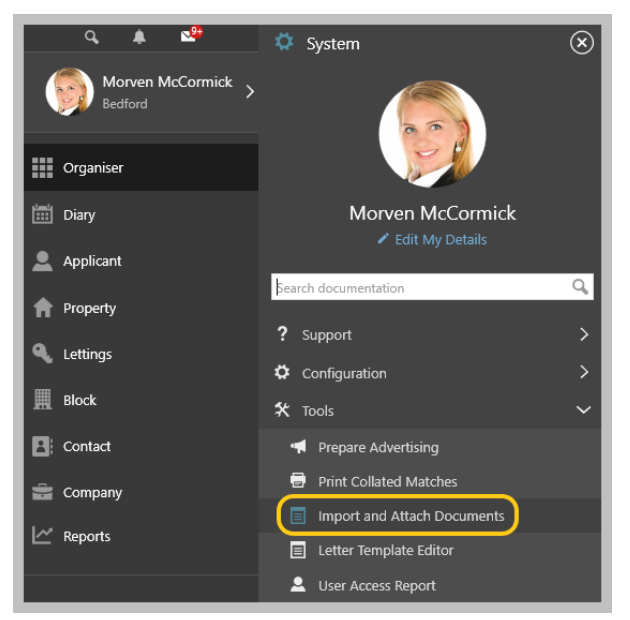
Document importer basics

1. Access document importer via Tools menu

From main menu:

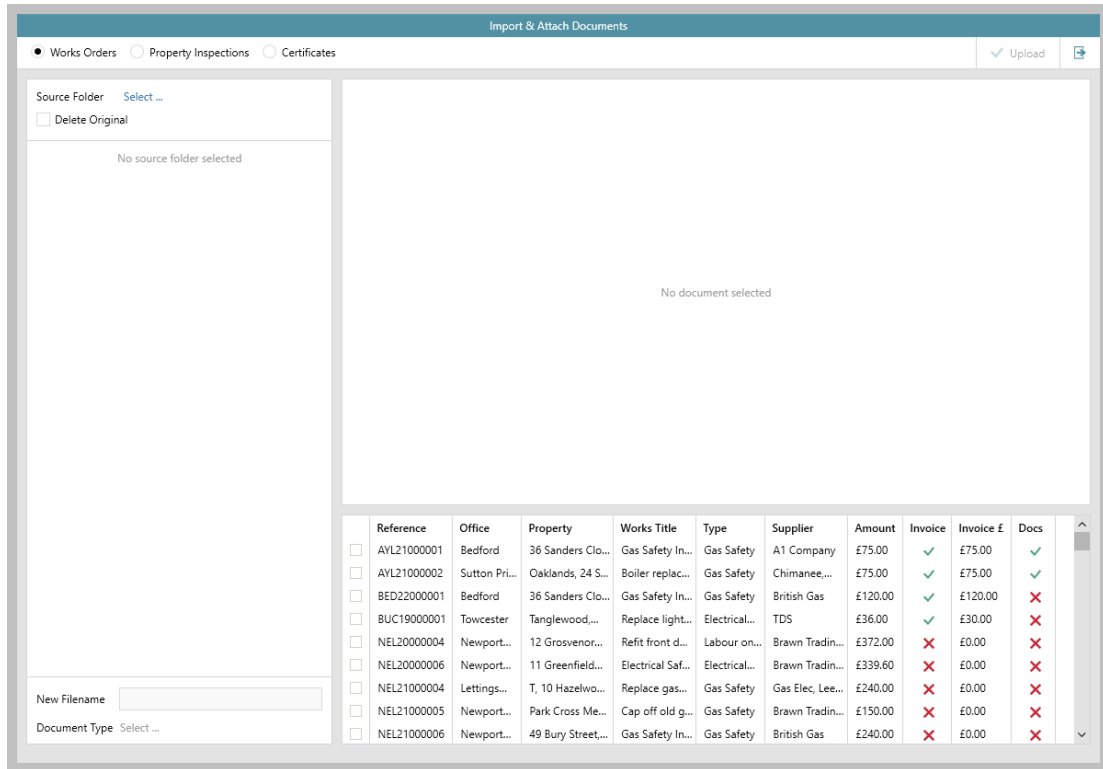
- Click name/office (top left)
- Click **Tools** and select **Import and Attach Documents**

The document importer screen is displayed, see next step



2. Document importer screen basics - including creating/viewing supplier invoice

- Filter options (top left) allow you to switch between **Works Orders, Property Inspections & Certificates**
- Works Orders are shown by default (see next section for works order specific information)



- The grid in the bottom right panel lists relevant works orders/property inspections/certificates
- Grid functions can be used:
 - Click the column heading to sort by that column
 - Click to the right of the column heading to filter by column content e.g. to group works orders according to whether they have documents uploaded or not - click to the right of the **Docs** column heading and select **Group by Docs**
- Double-click the entry to view the works order/property inspection appointment/certificate record

Invoice column

- A green tick is displayed to indicate that a supplier invoice has been created
- A red cross is displayed to indicate no invoice raised
 - Click the red cross to create a new invoice from the works order detail

Docs column

- A green tick is displayed to indicate that document(s) have been uploaded - hover over the tick to see filename(s) of uploaded documents
- A red cross is displayed to indicate no documents uploaded

3. Documents to upload

Points to note:

- Only PDF documents can be uploaded to the importer
- It is advised to store all the documents for the required upload type (i.e. Works Orders, Property Inspections, Certificates) in one folder for each batch of documents you wish to upload - this allows them to be uploaded in one go, see following sections for more information on how to upload files

Upload supplier invoice documents to works order invoices

Documents uploaded and linked to a works order are uploaded to the associated supplier invoice , not the works order itself

1. View completed works orders with no posted supplier invoice

Select **Works Orders** filter (top left):

- Relevant works orders are displayed in the panel bottom right
- Works orders are automatically displayed in this panel that have a status of **Completed** with the supplier invoice **not posted**

The screenshot shows the 'Import & Attach Documents' window. At the top, there are radio buttons for 'Works Orders' (selected), 'Property Inspections', and 'Certificates'. Below this is a 'Source Folder' section with a 'Select ...' button and a 'Delete Original' checkbox. The main area is empty, displaying 'No document selected'. At the bottom, there is a table of works orders.

Reference	Office	Property	Works Title	Type	Supplier	Amount	Invoice	Invoice £	Docs
<input type="checkbox"/> AVL21000001	Bedford	36 Sanders Clo...	Gas Safety In...	Gas Safety	A1 Company	£75.00	✓	£75.00	✓
<input type="checkbox"/> AVL21000002	Sutton Pri...	Oaklands, 24 S...	Boiler replac...	Gas Safety	Chimanee...	£75.00	✓	£75.00	✓
<input type="checkbox"/> BED22000001	Bedford	36 Sanders Clo...	Gas Safety In...	Gas Safety	British Gas	£120.00	✓	£120.00	✗
<input type="checkbox"/> BUC19000001	Towcester	Tanglewood...	Replace light...	Electrical...	TDS	£36.00	✓	£30.00	✗
<input type="checkbox"/> NEL20000004	Newport...	12 Grosvenor...	Refit front d...	Labour on...	Brawn Tradin...	£372.00	✗	£0.00	✗
<input type="checkbox"/> NEL20000006	Newport...	11 Greenfield...	Electrical Saf...	Electrical...	Brawn Tradin...	£339.60	✗	£0.00	✗
<input type="checkbox"/> NEL21000004	Lettings...	T, 10 Hazelwo...	Replace gas...	Gas Safety	Gas Elec, Lee...	£240.00	✗	£0.00	✗
<input type="checkbox"/> NEL21000005	Newport...	Park Cross Me...	Cap off old g...	Gas Safety	Brawn Tradin...	£150.00	✗	£0.00	✗
<input type="checkbox"/> NEL21000006	Newport...	49 Bury Street...	Gas Safety In...	Gas Safety	British Gas	£240.00	✗	£0.00	✗

2. Upload documents to the importer & change filename/type

Locate the folder where the PDF documents are stored:

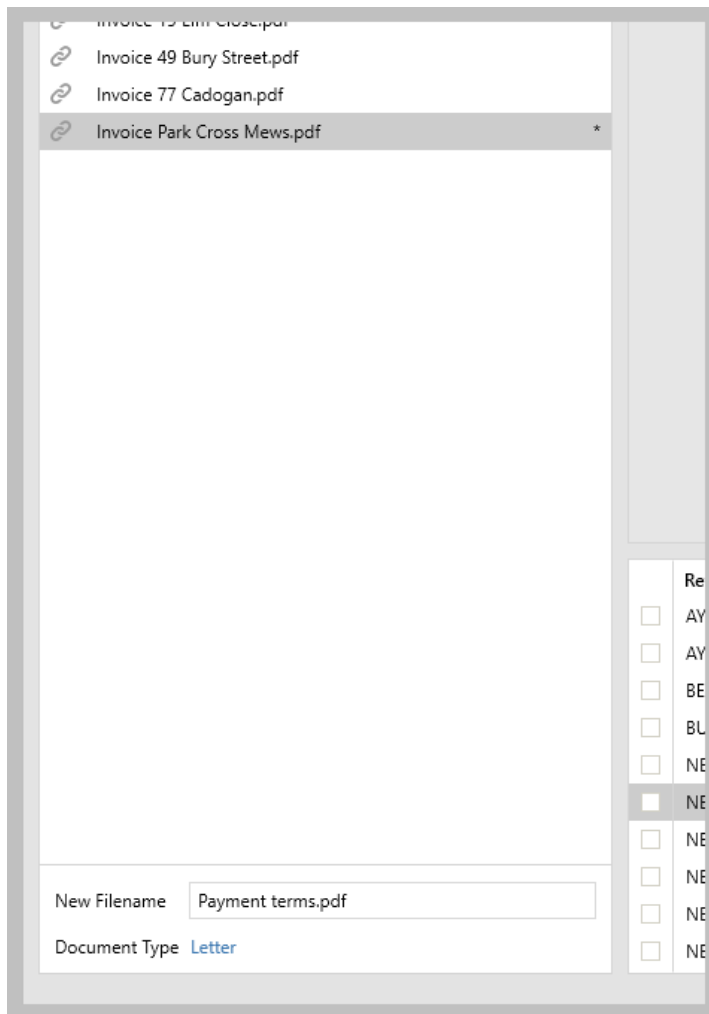
- Beside **Source Folder** (top left), click **Select** (shown in step 1)
- Browse to where the documents are stored, select folder and click **OK**
- All PDF documents in the selected folder are displayed on left
*Files can be re-uploaded - click **Source Folder** option again and select required/same folder to refresh the document list*
- Select a document on the left to display a preview of it on the right

The screenshot shows the 'Import & Attach Documents' window. On the left, there is a 'Source Folder' field and a list of PDF files. The central area displays a preview of an invoice for 'Able Maintenance' with details like VAT No, Date, and Status. At the bottom, a table lists various works orders with columns for Reference, Office, Property, Works Title, Type, Supplier, Amount, Invoice, Invoice £, and Docs.

Reference	Office	Property	Works Title	Type	Supplier	Amount	Invoice	Invoice £	Docs	
<input type="checkbox"/>	AYL21000001	Bedford	36 Sanders Clo...	Gas Safety Inspection	Gas Safety	A1 Company	£75.00	✓	£75.00	✓
<input type="checkbox"/>	AYL21000002	Sutton Pri...	Oaklands, 24 S...	Boiler replacement	Gas Safety	Chimanee, Milto...	£75.00	✓	£75.00	✓
<input type="checkbox"/>	BED22000001	Bedford	36 Sanders Clo...	Gas Safety Inspection	Gas Safety	British Gas	£120.00	✓	£120.00	✗
<input type="checkbox"/>	BUC19000001	Towcester	Tanglewood...	Replace light fittings in ba...	Electrical Safety	TDS	£36.00	✓	£30.00	✗
<input type="checkbox"/>	NEL20000004	Newport...	12 Grosvenor...	Refit front door	Labour only Wa...	Brawn Trading PL...	£372.00	✓	£372.00	✗
<input checked="" type="checkbox"/>	NEL20000006	Newport...	76-78, Cadoga...	Leaking washing machine	Emergency Plu...	Brawn Trading PL...	£339.60	✗	£0.00	✗
<input type="checkbox"/>	NEL21000004	Lettings...	T, 10 Hazelwo...	Replace gas hob	Gas Safety	Gas Elec Leeds	£240.00	✗	£0.00	✗
<input type="checkbox"/>	NEL21000005	Newport...	Park Cross Me...	Cap off old gas fire	Gas Safety	Brawn Trading PL...	£150.00	✗	£0.00	✗
<input type="checkbox"/>	NEL21000006	Newport...	49 Bury Street...	Gas Safety Inspection	Gas Safety	British Gas	£240.00	✗	£0.00	✗
<input type="checkbox"/>	NEL21000008	Newport...	2 Arteja Drive	Safety inspection	Gas Safety	Gas Elec Leeds	£240.00	✗	£0.00	✗

The filename & type can be changed when it is uploaded:

- Select required document in files list on left



- At bottom left, enter **New Filename** and/or change **Document Type**
- The name/type chosen will be used for the selected file when it is uploaded to the works order invoice
An asterisk () is shown to the right of the file to indicate that it will be uploaded using a different name/type*

3. Link document to works order invoice

In panel bottom right:

- Select works order
- Click link icon to the left of the relevant document

The screenshot shows the 'Import & Attach Documents' window. On the left, a file list contains several PDF invoices, with 'Invoice 77 Cadogan.pdf' selected. A text box below the list says 'Click to link to selected document'. On the right, a preview of a 'Reapit' invoice is shown. The invoice header includes the Reapit logo and the text 'PUT ON RE'. The address is 'Able Maintenance, 38 Warren Street, London, W1T 6AE'. The VAT No. is 123, Date is 03/, Required by is 10/, Reference is LON, and Status is Cor. The 'Works Order' section has a summary: 'Summary: Leaking Washing Machine, Property: 77 Cadogan Place, London, SW1X 9RP'. Below the invoice preview is a table with columns: Reference, Office, Property, Works Title, Type, and Supplier.

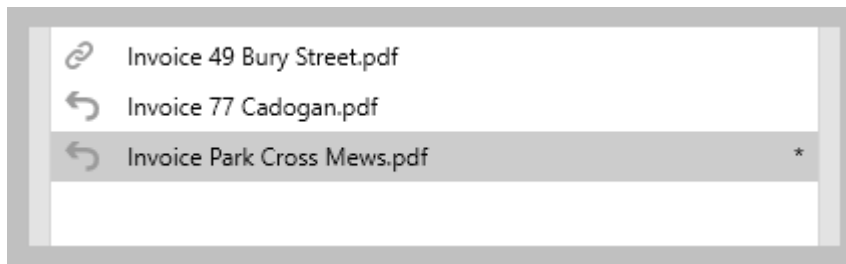
Reference	Office	Property	Works Title	Type	Supplier	
<input type="checkbox"/>	AYL21000001	Bedford	36 Sanders Clo...	Gas Safety Inspection	Gas Safety	A1 Company
<input type="checkbox"/>	AYL21000002	Sutton Pri...	Oaklands, 24 S...	Boiler replacement	Gas Safety	Chimane, Milto...
<input type="checkbox"/>	BED22000001	Bedford	36 Sanders Clo...	Gas Safety Inspection	Gas Safety	British Gas
<input type="checkbox"/>	BUC19000001	Towcester	Tanglewood,...	Replace light fittings in ba...	Electrical Safety	TDS
<input type="checkbox"/>	NEL20000004	Newport...	12 Grosvenor...	Refit front door	Labour only Wa...	Brawn Trading Pl.
<input checked="" type="checkbox"/>	NEL20000006	Newport...	76-78, Cadoga...	Leaking washing machine	Emergency Plu...	Brawn Trading Pl.
<input type="checkbox"/>	NEL21000004	Lettings...	T, 10 Hazelwo...	Replace gas hob	Gas Safety	Gas Elec, Leeds
<input type="checkbox"/>	NEL21000005	Newport...	Park Cross Me...	Cap off old gas fire	Gas Safety	Brawn Trading Pl.
<input type="checkbox"/>	NEL21000006	Newport...	49 Bury Street,...	Gas Safety Inspection	Gas Safety	British Gas
<input type="checkbox"/>	NEL21000008	Newport...	2 Arteja Drive	Safety inspection	Gas Safety	Gas Elec, Leeds

- The link icon is replaced with an arrow/undo icon, allowing you to unlink the document

This screenshot shows the same 'Import & Attach Documents' window. The file list on the left now includes 'Invoice 77 Cadogan.pdf' with an arrow/undo icon next to its name, indicating it has been unlinked. The other files and the interface layout remain the same.

If you wish to link more than one document to the selected works order:

- Continue to click the link icon beside each document to link



More than one document can be linked to the same works order
A document can only be linked to one works order

4. Upload documents to works order invoices in bulk

When documents are linked to a works order, the works order is displayed with a tick beside it in the panel bottom right, indicating that documents are linked and ready to be uploaded

If you have more works orders to link documents to:

- Select the required works order and continue the process, as outlined in step 3

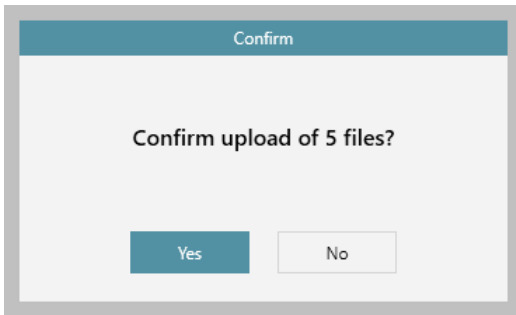
Reference	Office	Property	Works Title	Type	Supplier	Amount	Invoice	Invoice £	Docs	
<input type="checkbox"/>	BUC19000001	Towcester	Tanglewood, Water Stratford, Buckin...	Replace light fittings in ba...	Electrical Safety	TDS	£36.00	✓	£30.00	✗
<input checked="" type="checkbox"/>	NEL20000004	Newport...	12 Grosvenor Way	Refit front door	Labour only Wa...	Brawn Trading Pl...	£372.00	✓	£372.00	✗
<input checked="" type="checkbox"/>	NEL20000006	Newport...	76-78, Cadogan Place, London, SW1...	Leaking washing machine	Emergency Plu...	Brawn Trading Pl...	£339.60	✗	£0.00	✗
<input checked="" type="checkbox"/>	NEL21000004	Lettings...	T, 10 Hazelwood, Great Linford, MK1...	Replace gas hob	Gas Safety	Gas Elec Leeds	£240.00	✗	£0.00	✗
<input checked="" type="checkbox"/>	NEL21000005	Newport...	Park Cross Mews, 21 Park Cross Stre...	Cap off old gas fire	Gas Safety	Brawn Trading Pl...	£150.00	✓	£0.00	✗
<input checked="" type="checkbox"/>	NEL21000006	Newport...	49 Bury Street, Newport Pagnella...	Gas Safety Inspection	Gas Safety	British Gas	£240.00	✗	£0.00	✗
<input checked="" type="checkbox"/>	NEL21000008	Newport...	2 Arteja Drive	Safety inspection	Gas Safety	Gas Elec Leeds	£240.00	✗	£0.00	✗
<input type="checkbox"/>	NEL21000015	Newport...	13 Pasadena Drive	Testing gas appliances	Gas Safety	British Gas	£360.00	✓	£360.00	✓
<input type="checkbox"/>	NEP21000083	Bedford L...	15 Elm Close, Campton, SG17 5PE	Gas Safety Inspection	Gas Safety	British Gas	£75.00	✓	£0.00	✗
<input type="checkbox"/>	NEP21000092	Bedford L...	97 Southern Cross, Wisams, MK42 6...	Gas Safety Inspection	Gas Safety	Harry Ltd, London	£75.00	✗	£0.00	✗
<input type="checkbox"/>	OH02100001	Newport...	49 Run Street, Newport Pagnella...	Gas Safety Inspection	Gas Safety	British Gas	£70.00	✗	£0.00	✗

When all required works orders are linked to documents:

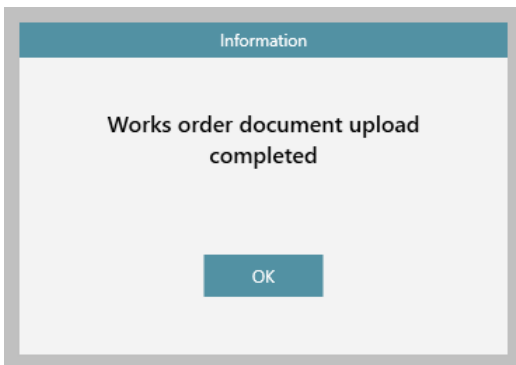
- An option to delete the original is available, this will delete any successfully uploaded files from the source location (ignore this step if you want to keep the original files in the source location)
 - Tick **Delete Original**

- Click **Upload** (top right)

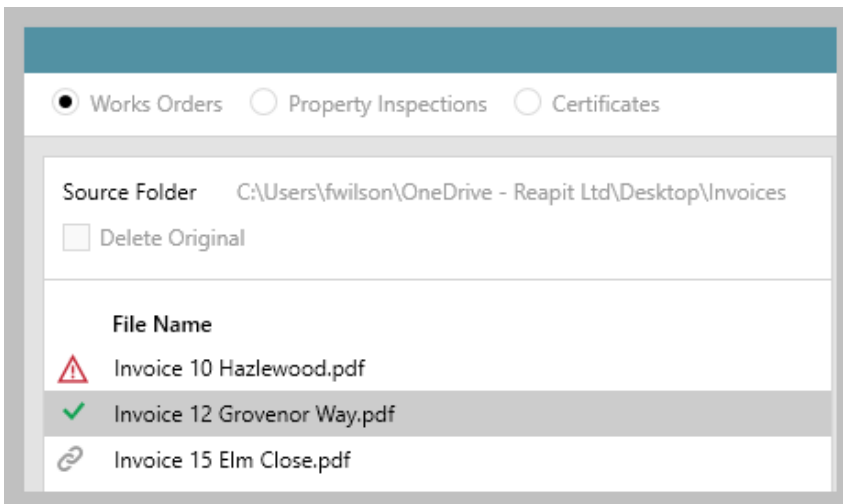
- A confirmation message will be displayed - click **Yes**



- A confirmation message will be displayed to indicate the upload is complete



- In the panel on the left, files which have been successfully uploaded will display with a green tick
If a file could not be uploaded, an error icon will be displayed
Files that weren't linked to a works order will show with the link icon beside them



To prevent any duplication of work, to upload & link more documents (or re-attempt failed uploads), close the document importer & re-open to start a new session

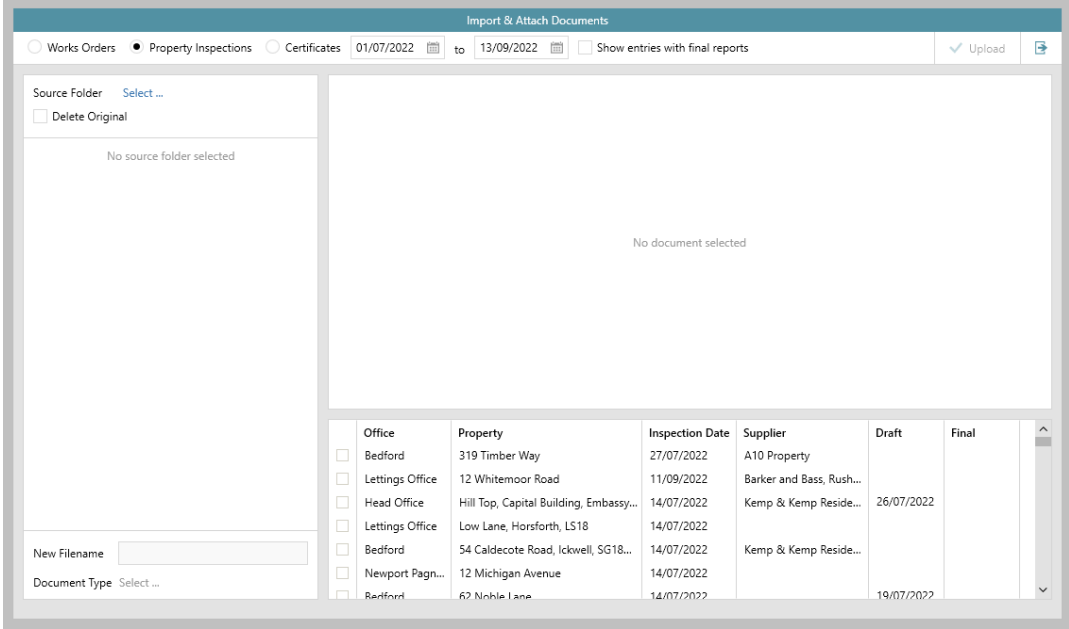
Upload property inspection (PI) report documents to PI appointments

The property inspections option is only available when using advanced property inspection functionality (which provides the ability to upload draft and final reports as part of the inspection appointment) – see Knowledge Base for more information on this functionality

1. View PI appointments to upload draft/final reports

Select **Property Inspections** filter (top left):

- The panel (bottom right) will automatically show PI appointments within the last month to date which do not have a final report uploaded against them
- To increase the time frame shown, use the date filters at the top of the screen
- If you need to re-upload a final report, tick **Show entries with final reports**



The screenshot shows the 'Import & Attach Documents' interface. At the top, there are radio buttons for 'Works Orders', 'Property Inspections' (selected), and 'Certificates'. There are date filters for '01/07/2022' to '13/09/2022' and a checkbox for 'Show entries with final reports'. Below this, there are two main panels: 'Source Folder' on the left and 'No document selected' on the right. At the bottom, there is a table of appointments.

Office	Property	Inspection Date	Supplier	Draft	Final
<input type="checkbox"/> Bedford	319 Timber Way	27/07/2022	A10 Property		
<input type="checkbox"/> Lettings Office	12 Whitemoor Road	11/09/2022	Barker and Bass, Rush...		
<input type="checkbox"/> Head Office	Hill Top, Capital Building, Embassy...	14/07/2022	Kemp & Kemp Reside...	26/07/2022	
<input type="checkbox"/> Lettings Office	Low Lane, Horsforth, LS18	14/07/2022			
<input type="checkbox"/> Bedford	54 Caldecote Road, Ickwell, SG18...	14/07/2022	Kemp & Kemp Reside...		
<input type="checkbox"/> Newport Pagn...	12 Michigan Avenue	14/07/2022			
<input type="checkbox"/> Bedford	62 Noble Lane	14/07/2022		19/07/2022	

2. Upload documents to the importer & change filename/type

Locate the folder where the PDF documents are stored:

- Beside **Source Folder** (top left), click **Select** (shown in step 1)
- Browse to where the documents are stored, select folder and click **OK**
- All PDF documents in the selected folder are displayed on left
*Files can be re-uploaded - click **Source Folder** option again and select required/same folder to refresh the document list*
- Select a document on the left to display a preview of it on the right

The screenshot shows the 'Import & Attach Documents' window. At the top, there are tabs for 'Works Orders', 'Property Inspections', and 'Certificates'. Below the tabs, there are date filters: '01/07/2022' to '13/09/2022' and a checkbox for 'Show entries with final reports'. The 'Source Folder' is set to 'C:\Users\jwilson\OneDrive - Reapit...'. A 'Delete Original' checkbox is present. The file list on the left includes:

- 12 Whitemoor Road draft report.pdf
- 319 Timber Way draft report.pdf
- 54 Caldecot draft report.pdf
- Hill Top final report.pdf
- Low Lane draft report.pdf

The preview on the right shows a 'Property Inspection Report Draft' for '12 Whitemoor Road Bedford, MK40 7FR'. Below the preview is a table of inspection records:

Office	Property	Inspection Date	Supplier	Draft	Final
<input type="checkbox"/>	Bedford	319 Timber Way	27/07/2022	A10 Property	
<input checked="" type="checkbox"/>	Lettings Office	12 Whitemoor Road, Bedford, MK...	11/09/2022	Barker and Bass, Rush...	
<input type="checkbox"/>	Head Office	Hill Top, Capital Building, Embass...	14/07/2022	Kemp & Kemp Reside...	26/07/2022
<input type="checkbox"/>	Lettings Office	Low Lane, Horsforth, LS18	14/07/2022		
<input type="checkbox"/>	Bedford	54 Caldecote Road, Ickwell, SG18...	14/07/2022	Kemp & Kemp Reside...	
<input type="checkbox"/>	Newport Pagn...	12 Michigan Avenue	14/07/2022		
<input type="checkbox"/>	Bedford	62 Noble Lane	14/07/2022		19/07/2022

At the bottom, there is a 'New Filename' field with '12 Whitemoor Road draft report.pdf' and a 'Document Type' dropdown set to 'Draft PI Report'.

Before uploading, ensure file name and document type are correct:

- Use **New Filename** to enter the correct filename
- Click **Document Type** to select **Draft PI Report** or **Final PI Report**, as appropriate

It is important that the correct document type is chosen in this step to ensure that the report is filed correctly as a **draft** or **final** report

3. Link inspection report document to inspection appointment

In panel bottom right:

- Select inspection appointment
- Click link icon to the left of the relevant report document

The screenshot shows the 'Import & Attach Documents' interface. At the top, there are tabs for 'Works Orders', 'Property Inspections' (selected), and 'Certificates'. Below the tabs, there are date pickers for '01/07/2022' and '13/09/2022', and a checkbox for 'Show entries with final reports'. The main area is divided into two panels. The left panel shows the 'Source Folder' as 'C:\Users\fwilson\OneDrive - Reapit...' and a 'Delete Original' checkbox. Below this is a 'File Name' list with the following items: '12 Whitemoor Road draft report.pdf', '54 Caldecot draft report.pdf', 'Hill Top final report.pdf', and 'Low Lane draft report.pdf'. A tooltip 'Click to link to selected document' is visible over the first item. At the bottom of the left panel, there is a 'New Filename' field containing '12 Whitemoor Road draft report.pdf' and a 'Document Type' dropdown set to 'Draft PI Report'. The right panel displays a large 'Property Inspection Report Draft' title. Below the title is a table with the following data:

	Office	Property	Inspection Date	Supp
<input type="checkbox"/>	Bedford	319 Timber Way	27/07/2022	A10 F
<input checked="" type="checkbox"/>	Lettings Office	12 Whitemoor Road, Bedford, MK...	11/09/2022	Barke
<input type="checkbox"/>	Head Office	Hill Top, Capital Building, Embassy...	14/07/2022	Kemp
<input type="checkbox"/>	Lettings Office	Low Lane, Horsforth, LS18	14/07/2022	
<input type="checkbox"/>	Bedford	54 Caldecote Road, Ickwell, SG18...	14/07/2022	Kemp
<input type="checkbox"/>	Newport Pagn...	12 Michigan Avenue	14/07/2022	
<input type="checkbox"/>	Bedford	62 Noble Lane	14/07/2022	

- The link icon is replaced with an arrow/undo icon, allowing you to unlink the document

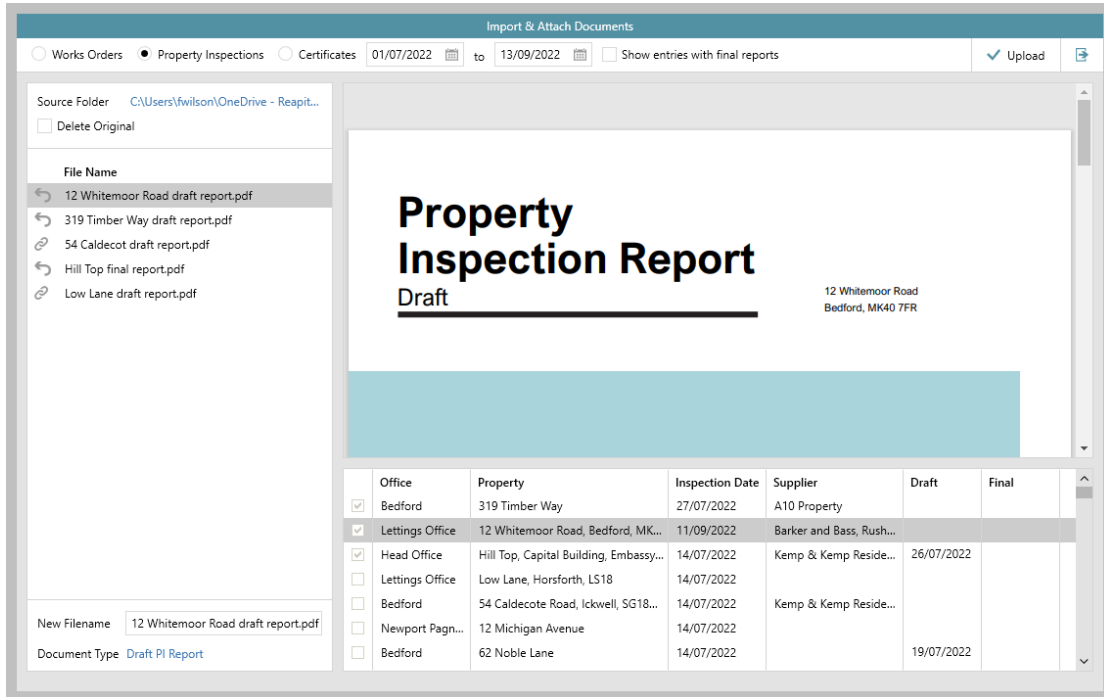
This screenshot shows the same 'Import & Attach Documents' interface as the previous one, but with the link icon for the selected file '12 Whitemoor Road draft report.pdf' replaced by an arrow/undo icon, indicating that the document has been unlinked.

4. Upload report documents to PI appointments in bulk

When a report document is linked to a PI appointment, the PI appointment is displayed with a tick beside it in the panel bottom right, indicating that documents are linked and ready to be uploaded

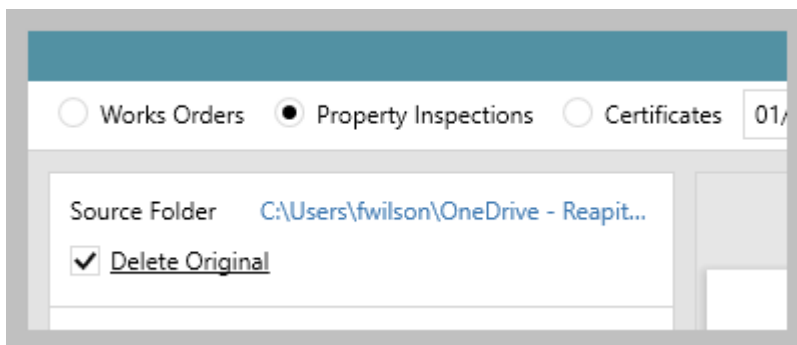
If you have more PI appointments to link documents to:

- Select the required PI appointment and continue the process, as outlined in step 3



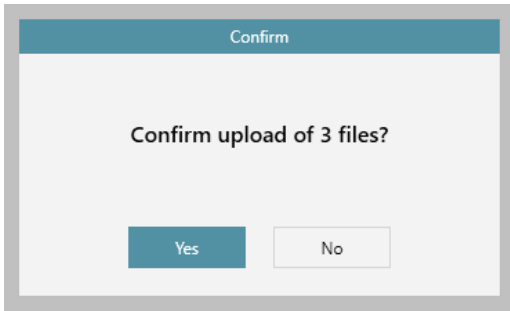
When all required PI appointments are linked to report documents:

- An option to delete the original is available, this will delete any successfully uploaded files from the source location (ignore this step if you want to keep the original files in the source location)
 - Tick **Delete Original**

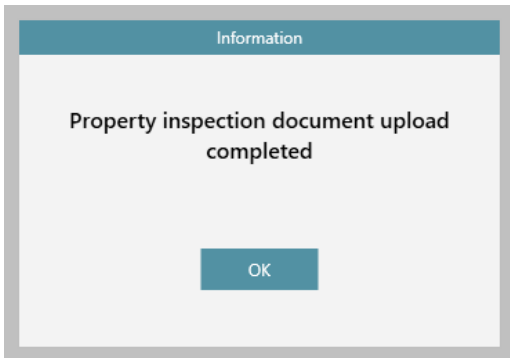


- Click **Upload** (top right)

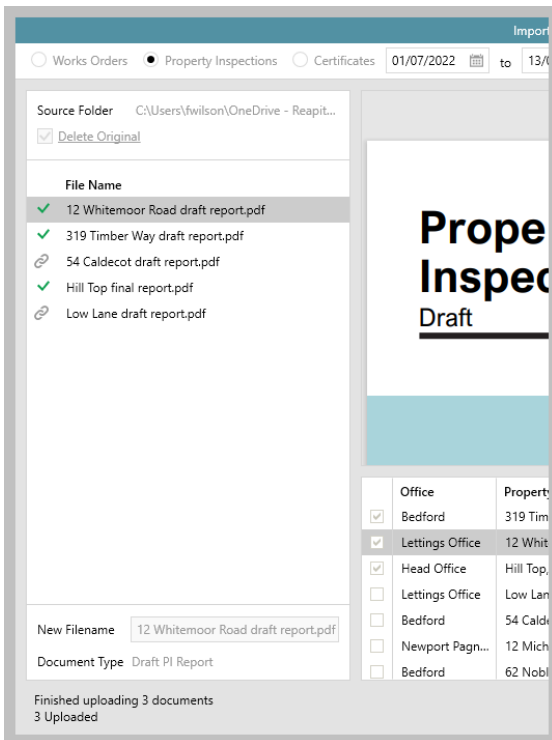
- A confirmation message will be displayed - click **Yes**



- A confirmation message will be displayed to indicate the upload is complete



- In the panel on the left, files which have been successfully uploaded will display with a green tick *If a file could not be uploaded, an error icon will be displayed*
Files that weren't linked to a PI appointment will show with the link icon beside them



To prevent any duplication of work, to upload & link more documents (or re-attempt failed uploads), close the document importer & re-open to start a new session

Add certificate details & upload certificate document/file

If you are not using advanced property inspection functionality, this option will not be available until AgencyCloud 12.155

1. Certificates

Select **Certificates** filter (top left):

- This screen allows you to add new certificate details and upload the certificate document/file

The screenshot shows a web interface titled "Import & Attach Documents". At the top, there are three radio buttons: "Works Orders", "Property Inspections", and "Certificates" (which is selected). To the right of these buttons are an "Upload" button with a checkmark and a folder icon. Below the navigation bar, the interface is divided into several sections. On the left, there is a "Source Folder" section with a "Select ..." button and a "Delete Original" checkbox. Below this, it says "No source folder selected". In the bottom left, there is a "New Filename" text input field and a "Document Type" dropdown menu with "Select ..." as the current selection. On the right side, there is a large empty area with the text "No document selected". Below this area is a "Select Property" section with a search input field and a magnifying glass icon. At the bottom right, it says "Landlord not found". A "+ Add Certificate" button is located at the bottom center of the interface.

2. Upload documents to the importer

Locate the folder where the PDF documents are stored:

- Beside **Source Folder** (top left), click **Select** (shown in step 1)
- Browse to where the documents are stored, select folder and click **OK**
- All PDF documents in the selected folder are displayed on left
*Files can be re-uploaded - click **Source Folder** option again and select required/same folder to refresh the document list*
- Select a document on the left to display a preview of it on the right

The screenshot shows the 'Import & Attach Documents' window. At the top, there are tabs for 'Works Orders', 'Property Inspections', and 'Certificates', with 'Certificates' selected. Below the tabs, there is an 'Upload' button. The main area is split into two panes. The left pane shows a 'Source Folder' path and a list of PDF files: 'GS 24 Marchmont Green Road.pdf', 'GS 68 Noble Lane.pdf', 'GS Tanglewood.pdf', and 'GS Unit 2 Ash, Abbey Fields.pdf'. The 'GS 68 Noble Lane.pdf' file is selected. Below the list, there is a 'Delete Original' checkbox. The right pane shows a preview of the selected PDF, which is a 'LANDLORD/HOMEOWNER GAS SAFETY RECORD' form. The form includes sections for 'Details of Registered Business', 'Details of Site', 'Details of Landlord/Homeowner', 'Appliance Details', 'Inspection Details', and 'Any Defects Identified'. Below the preview, there is a 'Select Property' search box and an 'Add Certificate' button. The text 'Landlord not found' is displayed below the search box.

The filename can be changed when it is uploaded:

- Select required document in files list on left and enter **New Filename** below
- **Document Type** is fixed as **Certificate**

An option to delete the original is available, this will delete any successfully uploaded files from the source location (ignore this step if you want to keep the original files in the source location)

- Tick **Delete Original**

This is a close-up screenshot of the file list area. It shows the 'Source Folder' path and the 'Delete Original' checkbox, which is now checked with a tick mark.

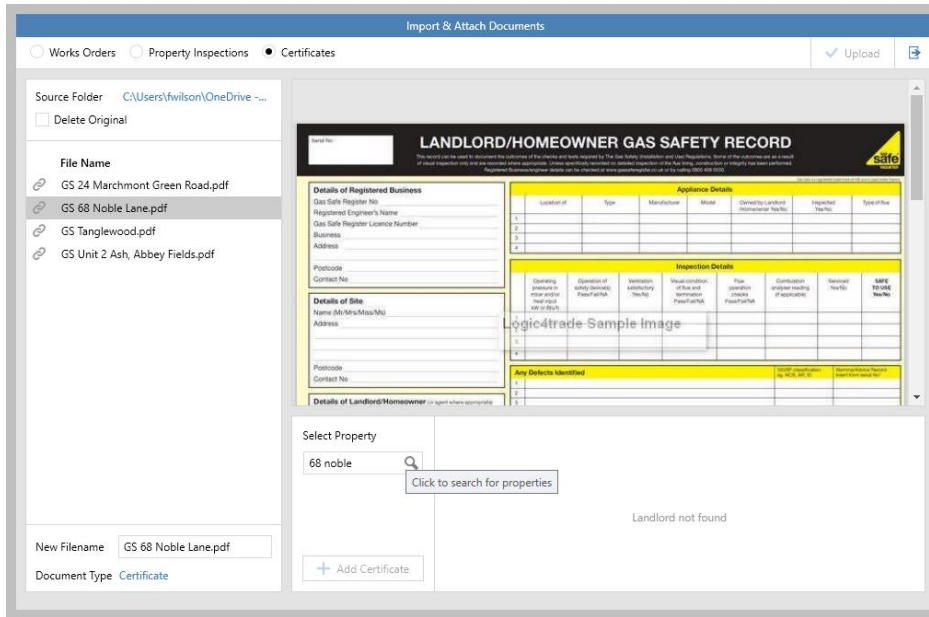
3. Add new certificate detail & upload certificate document/file

In panel on left:

- Select relevant certificate document/file

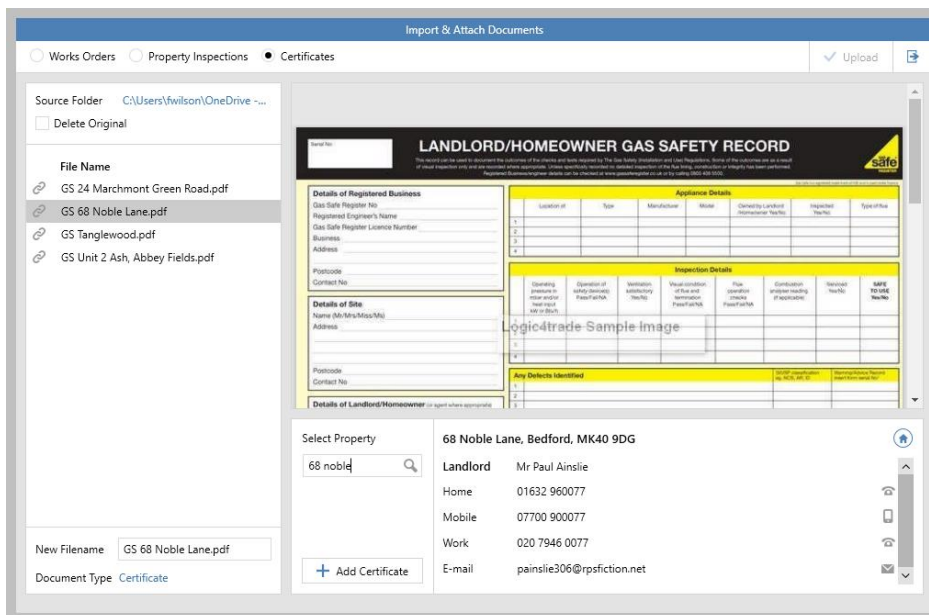
In panel bottom right:

- Search for required property (enter first line of address & click search icon)



- The property search screen will be displayed - double-click the property when found
The property and landlord details are now displayed in the panel bottom right (shown below)

- Click **Add Certificate**



- Enter new certificate details, as usual

New Certificate - Tanglewood, Water Stratford, Buckingham, MK18 5DX

Documents

Category Safety Certificate Insurance Policy Warranty

Type Gas Safety

Booked 05/09/2022

Expiry Date 04/09/2023

Provider Safe Gas Ltd, Oxford

Certificate Ref. KL45698745

Checks 0 of 0 complete

Appliances +

Type notes here

There is no need to click **Documents** to add the certificate document - it will be automatically uploaded when the new certificate details are saved in the next step

- Click **Save & Exit**

- The certificate details will be added and the selected document will be automatically uploaded

The screenshot shows the 'Import & Attach Documents' interface. At the top, there are radio buttons for 'Works Orders', 'Property Inspections', and 'Certificates', with 'Certificates' selected. An 'Upload' button is visible in the top right. On the left, a file list shows 'GS 24 Marchmont Green Road.pdf', 'GS 68 Noble Lane.pdf' (with a green checkmark), 'GS Tanglewood.pdf', and 'GS Unit 2 Ash, Abbey Fields.pdf'. Below the file list, there are fields for 'New Filename' (set to 'GS 68 Noble Lane.pdf') and 'Document Type' (set to 'Certificate'). At the bottom left, it says 'Finished uploading 1 document' and '1 Uploaded'. The main area displays a 'LANDLORD/HOMEOWNER GAS SAFETY RECORD' form. The form includes sections for 'Details of Registered Business', 'Details of Site', 'Appliance Details', and 'Inspection Details'. The 'Appliance Details' table has columns for Location #, Type, Manufacturer, Make, Checked by Landlord, Inspected (Yes/No), and Type of Gas. The 'Inspection Details' table has columns for Operating pressure in millibar and/or bar, Operation of safety devices, Ventilation satisfactory, Visual condition of gas and termination, Flue operation, Combustion, Inspected (Yes/No), and SAFE TO USE (Yes/No). Below the form, there is a 'Select Property' section with a search box containing '68 noble' and a dropdown showing '68 Noble Lane, Bedford, MK40 9DG'. To the right of this, contact information for the Landlord, Mr Paul Ainslie, is listed: Home (01632 960077), Mobile (07700 900077), Work (020 7946 0077), and E-mail (painslie306@rpsfiction.net). There is an 'Add Certificate' button below the property selection.

- In the panel on the left the document will display with a green tick beside it - a **Finished uploading** message is displayed at the bottom of the screen too

3. Continue uploading & adding certificates

- Repeat step 2 to continue adding new certificates and uploading certificate details
- Multiple certificate documents/files can be added to a single property

Accounts*

Identify deposits held for more than 90 days

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

An option can be added to the Property Management panel of the Organiser which identifies tenancies that have ended more than 90 days ago where the deposit has not yet been released

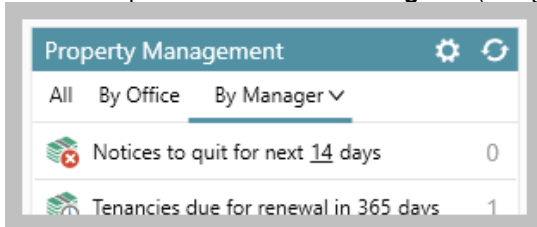
90 days is the default setting applied, although this can be changed either at user level (outlined below) or system-wide - *if you wish to change the system default, contact Reapit Support*

1. Add option to Property Management panel

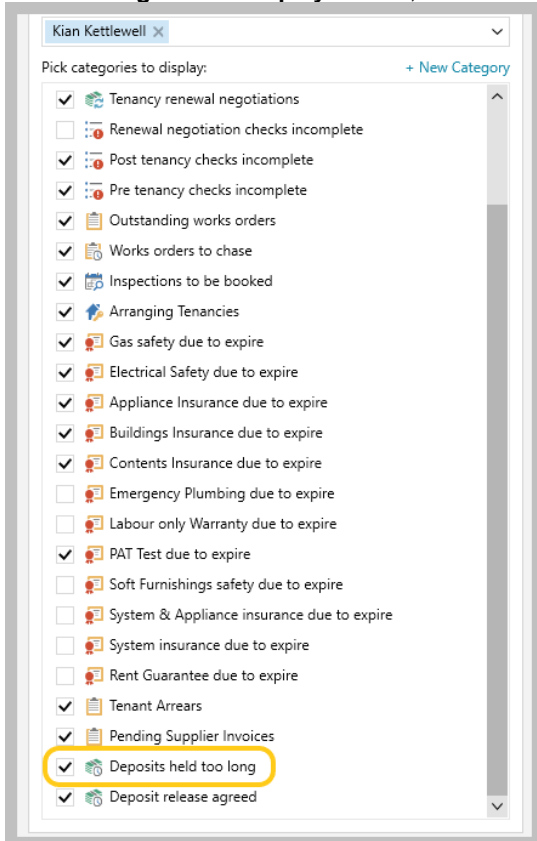
The option needs to be enabled via Panel Setup on the Property Management panel first

From Property Management panel:























- Hover over panel header and click **cog** icon (on right)



- In **Pick categories to display** section, scroll to bottom and tick **Deposits held too long**



- Click **tick** in panel header (top right) to save panel setup
- A new **Deposits not returned within 90 days** entry will be displayed at the bottom of the Property Management panel - *see notes on configuration above & below*

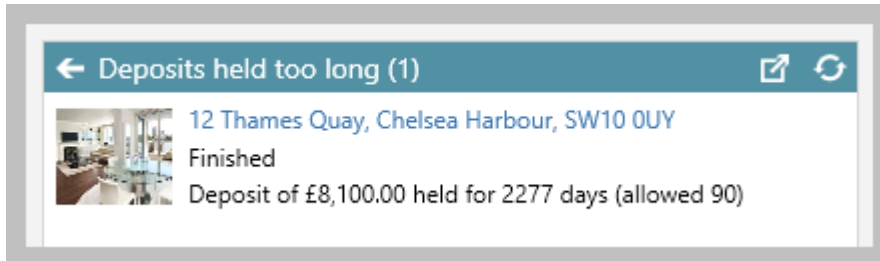
Property Management  		
All	By Office	Select.. ▾
	Notice to quit for tenancies expiring in <u>14</u> days	0
	Tenancies due for renewal in next <u>200</u> days	0
	Check out appointments to book in next <u>0</u> days	0
	Supplier accreditation expiry in <u>30</u> days	--
	Tenancy renewal negotiations	6
	Post tenancy checks incomplete	6
	Pre tenancy checks incomplete	2
	Outstanding works orders	6
	Works orders to chase	0
	Inspections to book before due date by <u>90</u> days	9
	Arranging Tenancies	4
	Gas safety certificate expiry in <u>30</u> days	7
	Electricity safety certificate expiry in <u>30</u> days	9
	Appliance insurance expiry in <u>30</u> days	10
	Buildings insurance expiry in <u>30</u> days	10
	Contents insurance expiry in <u>30</u> days	11
	PAT Test expiry in <u>30</u> days	11
	Tenant arrears	9
	Pending supplier invoices	1
	Deposits not returned within <u>90</u> days	1

Unless changed by your business, the default for this feature is 90 days - however, an individual user can change their own setting by clicking the current value and typing in the required number of days - when this has been done, the number of days chosen will stay at this figure unless changed by the individual (& will also stay this way if the system default is changed)


2. View details of deposits held too long

From Property Management panel:

- Click **Deposits not returned within 90 days** (as shown above)
- Related tenancies will be shown in a list - click to view the tenancy



- Or click the **pop-out into full results icon** (top right) to view more information in a grid

Tenancy Search - 1 listed  Exit

↑ Property	Tenant	Status	Rent p/m	Manager	Ltd to check out	Inventory clerk	Deposit held	Days since tenancy end
12 Thames Quay, Chelsea Harbour	Mr James Hetfield	Tenancy Finished	£5,866.07	Kian Kettle...	No		£8,100	2277

- Grid functions can then be used:
 - Click the column heading to sort by that column
 - Click to the right of the column heading to filter by column content