

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 criteria, each with a checkbox and a corresponding input field:
 - Dates:** Two date pickers (// /) with a "to" separator.
 - Expected exchange:** Two date pickers (// /) with a "to" separator.
 - Expected completion:** Two date pickers (// /) with a "to" separator.
 - Price:** Two currency input fields (£0) with a "to" separator.
 - Status:** A dropdown menu with the text "Select one or more status ...".
 - Property:** A dropdown menu with the text "Select one or more status ...". The selected value is "For Sale - Available, For Sale - Unavailable, Sold STC - Availa".
 - Office:** A dropdown menu with the text "Select one or more office ...".
 - Negotiator:** A dropdown menu with the text "Select negotiator/manager ...".
 - Extra:** A dropdown menu with the text "Select further report criteria ...".
- Report Button:** A blue button labeled "Report" located at the bottom right of the window.

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. The left section is a form for adding a new offer, and the right section displays property and applicant details.

Left Section (Form):

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

Right Section (Property and Applicant Details):

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

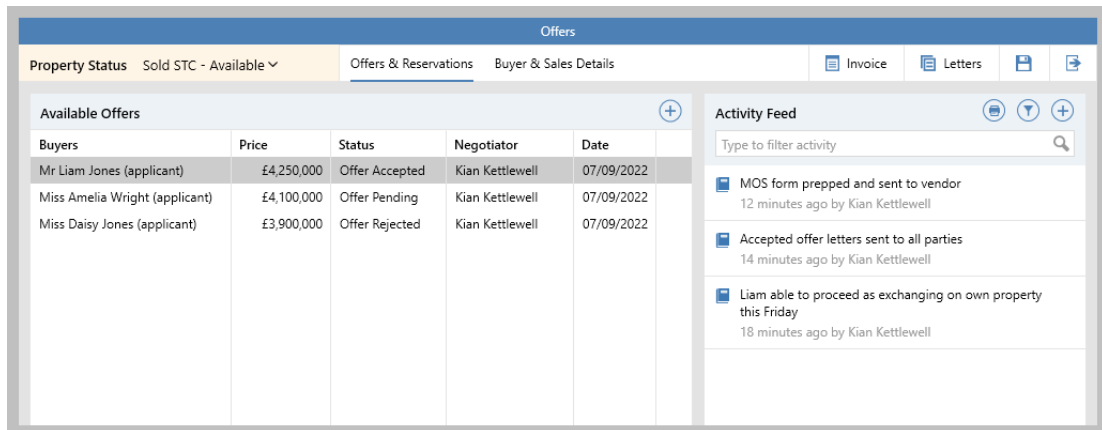
A configuration option is available which means that offer notes for the currently selected offer only will be displayed by default when viewing the offers screen

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

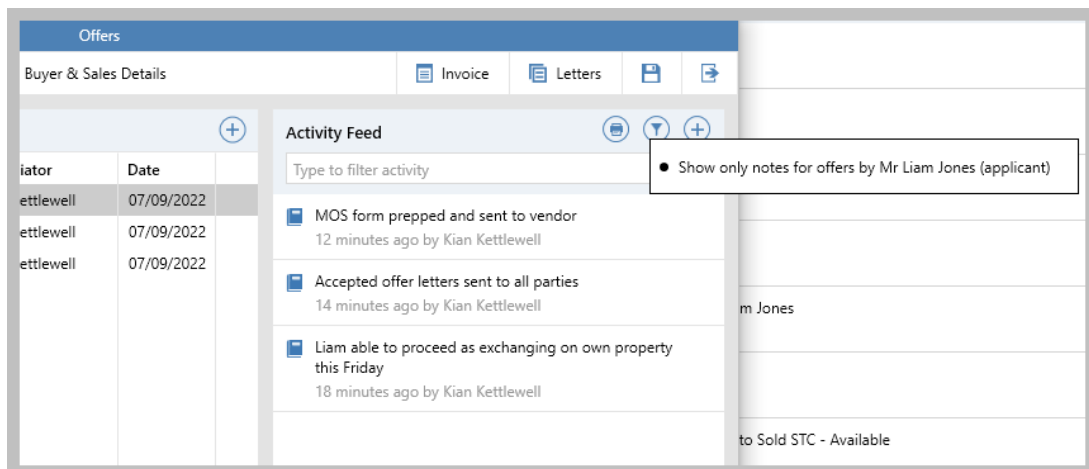
From property, click **Offers**:

- 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 99%

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**

New Property Report [New] [Save] [Exit]

Property Report ▾ Lettings ▾
Hide Property Criteria

Attributes

- Address
- Area
- Manager ▾ (Kian Kettlewell)
- Office
- Registered
- Source
- Age
- Bathroom
- Double Bedrooms
- Floor
- Location/Parking
- Reception Room
- Single Bedrooms
- Situation

Lettings

- Special
- Style
- Total Bedroom
- Type
- Available from
- Available to
- Landlord Address
- Landlord Company Name
- Landlord Contact Name
- Lettings Status ▾ (Tenancy Current - Available, Tenancy Current - Unavailable)
- Prp Admin
- Prp Manager
- Rent

Linked Records

- Appointments
- Landlord
- Offers
- Pre-Instruction Checks
- Tenancies
- Vendor
- Works Orders**

Show more ...

Predefine
Search for na

[Run Report]

- 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

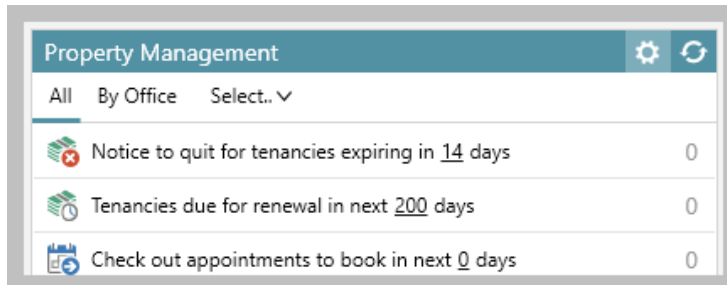
This report will return all properties with current tenancies, for a specific property manager, with outstanding works orders due to be completed this week

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

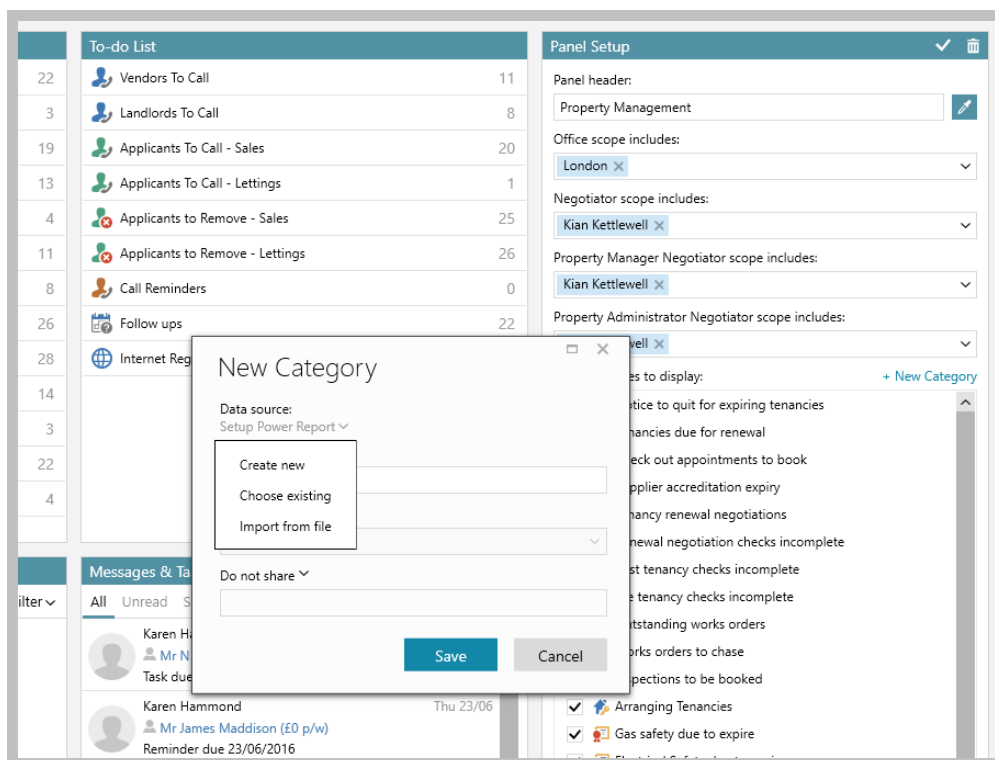
A works order report can be added to a panel on the Organiser - a new or pre-saved report can be added

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

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



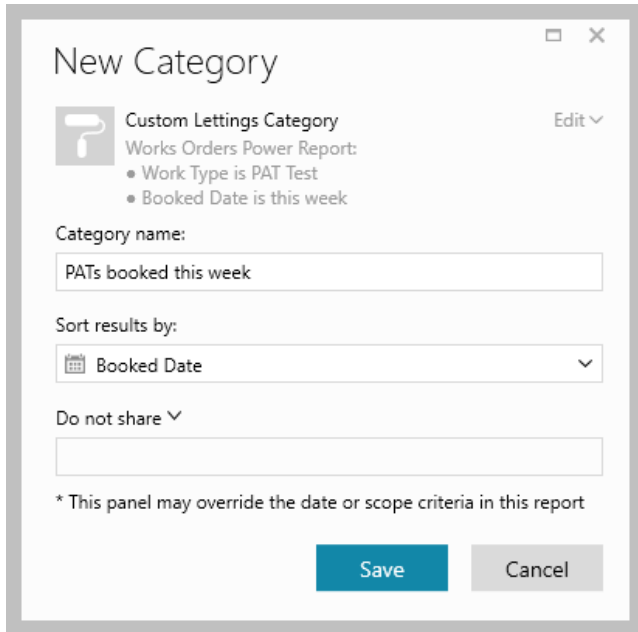
- From **Pick categories to display** section, click **+ New Category**



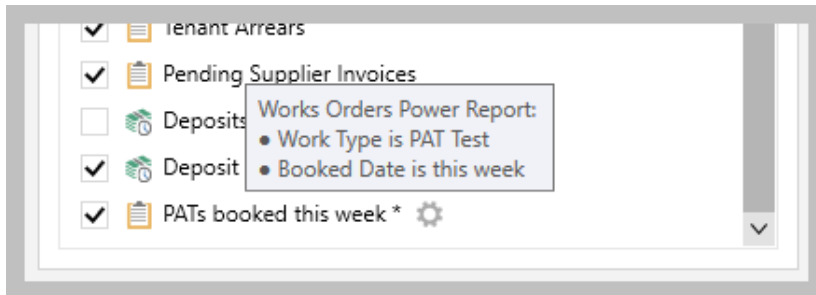
- Click **Setup Power Report** for options to:
 - **Create new** - build a new Works Order Power Report
 - **Choose existing** - pick an existing saved Works Order Power Report
 - **Import from file** - if you have been supplied with a Works Order Power Report file (.rrd file), this can be imported from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

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

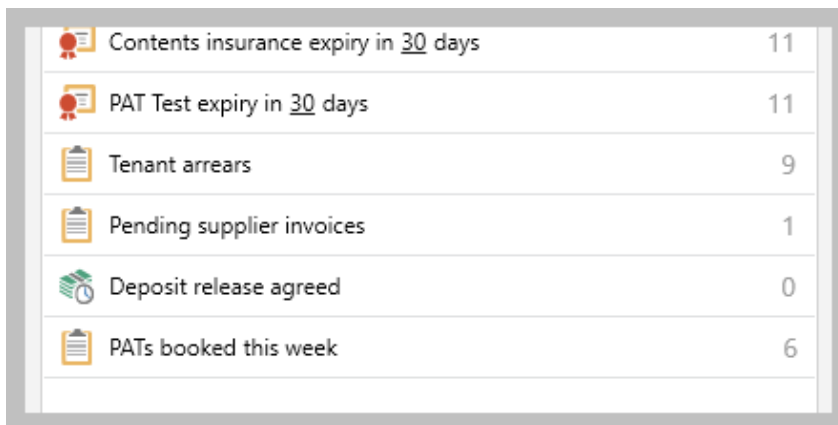
- Ensure **Category name** is entered plus sorting and sharing options are set-up as required, click **Save**









- 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 <u>30</u> days	11
 PAT Test expiry in <u>30</u> 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

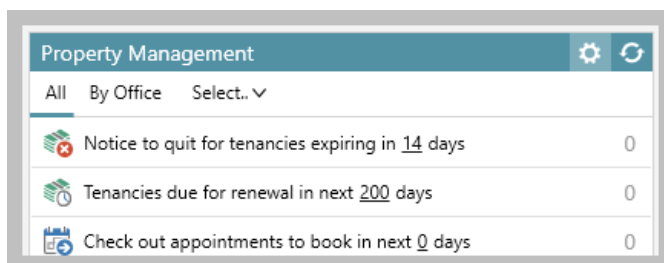
Information on renewal negotiations with incomplete renewal negotiation checks can be accessed via the Property Management panel on the Organiser

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

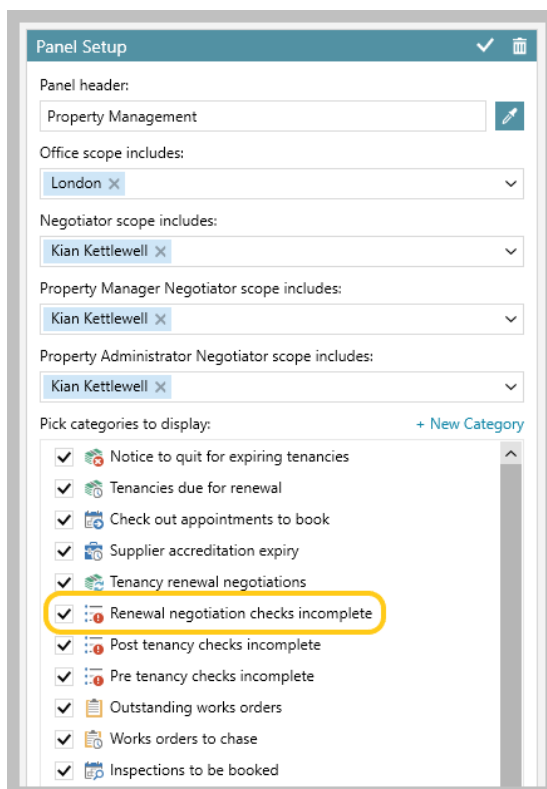
The renewal negotiation checks incomplete option first needs to be added to the Property Management panel via Panel Setup

From Property Management panel:

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



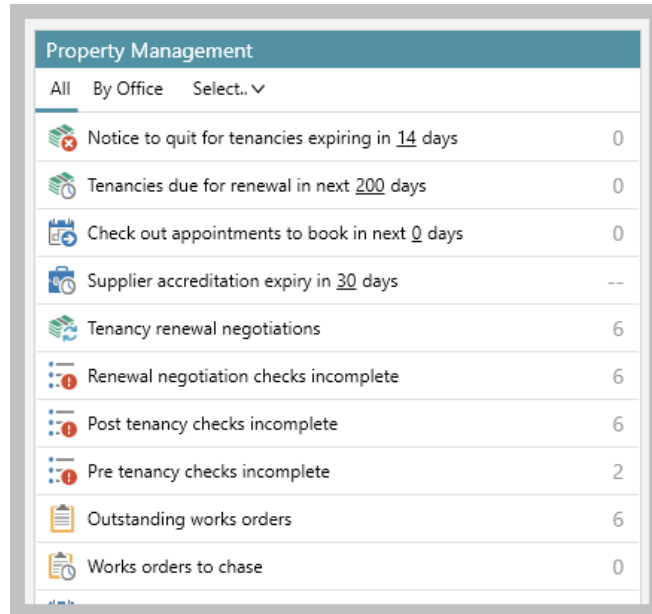
- From **Pick categories to display** section, tick **Renewal negotiation checks incomplete**













- 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



Property Management		
All	By Office	Select.. v
	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

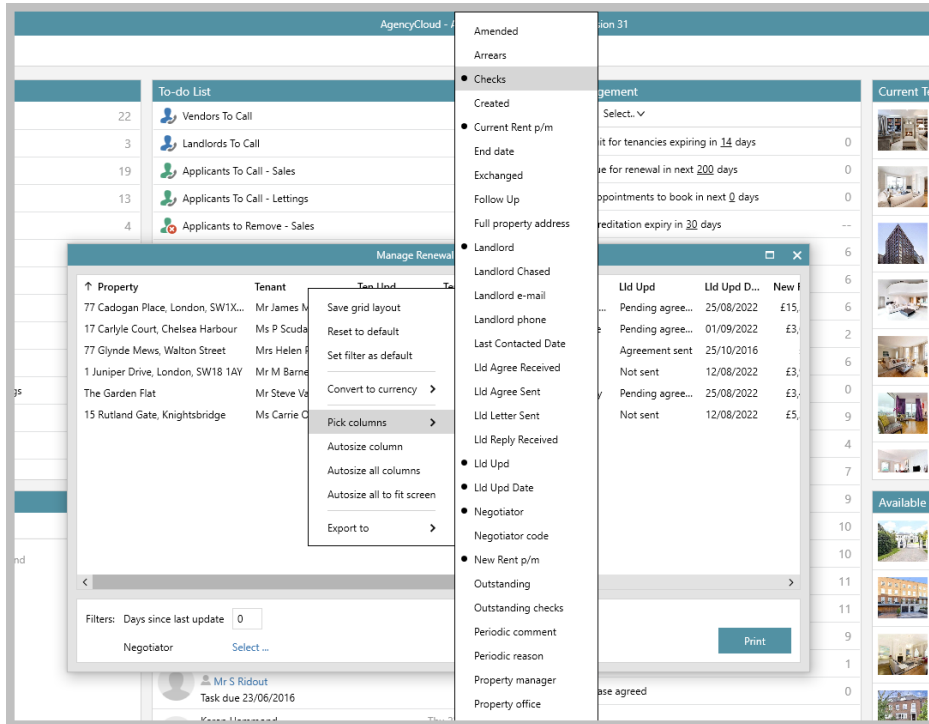
Negotiator

Print

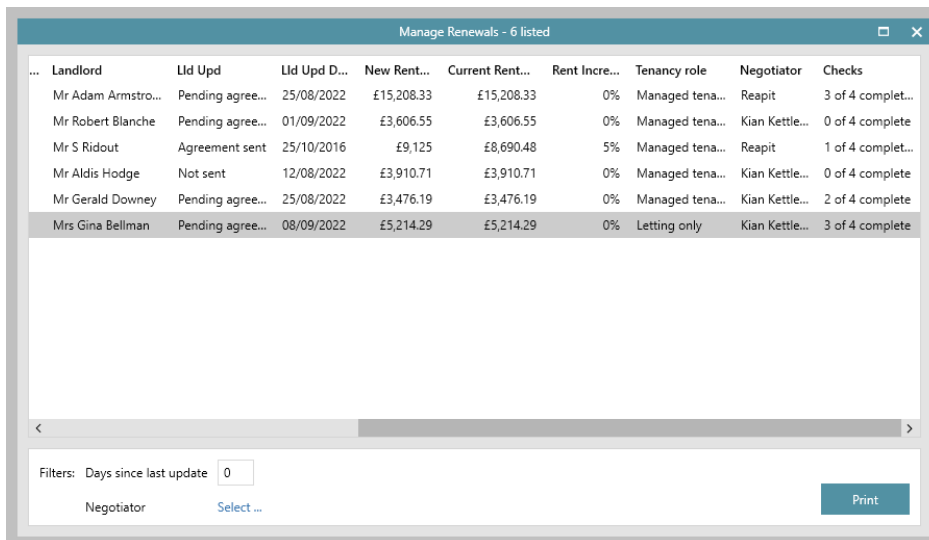
4. Add checks column to grid & save

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

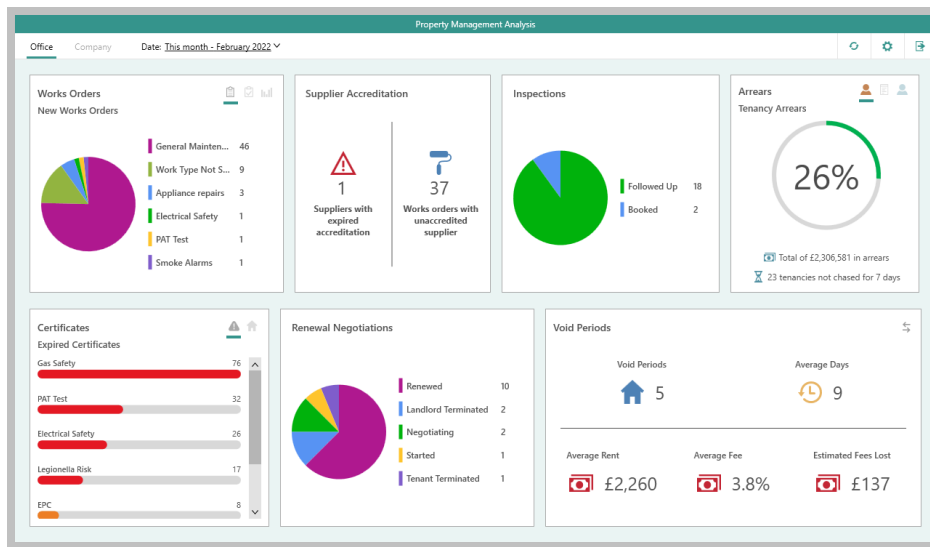
This guide has been reviewed against our global client base and classed as relevant to all regions

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

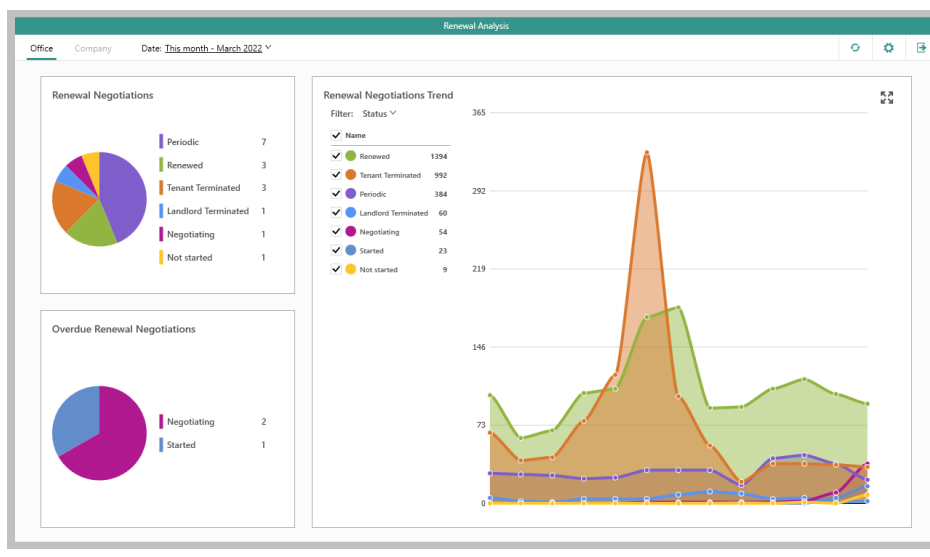
Property Management Analysis

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



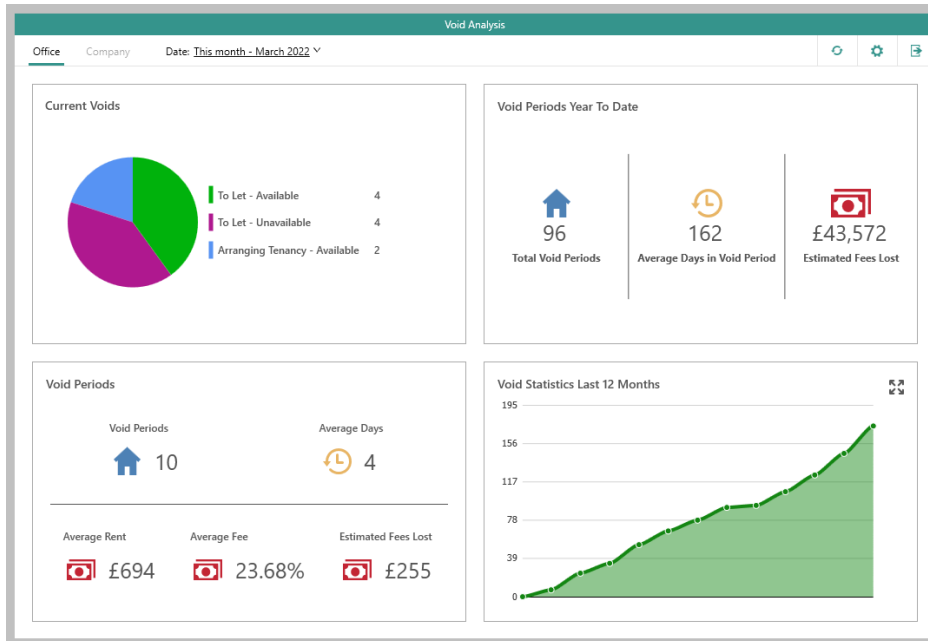
Renewal Analysis

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 lettings 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

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

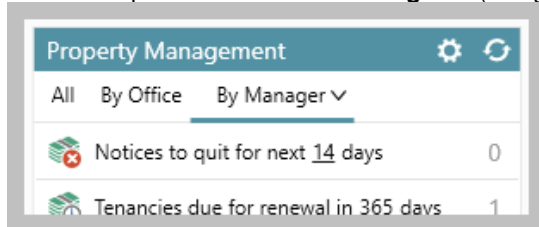
90 days is the default setting applied, although this can be changed either at user level (outlined below) or system-wide - *if you wish to change the system default, contact Reapit Support*

1. Add option to Property Management panel

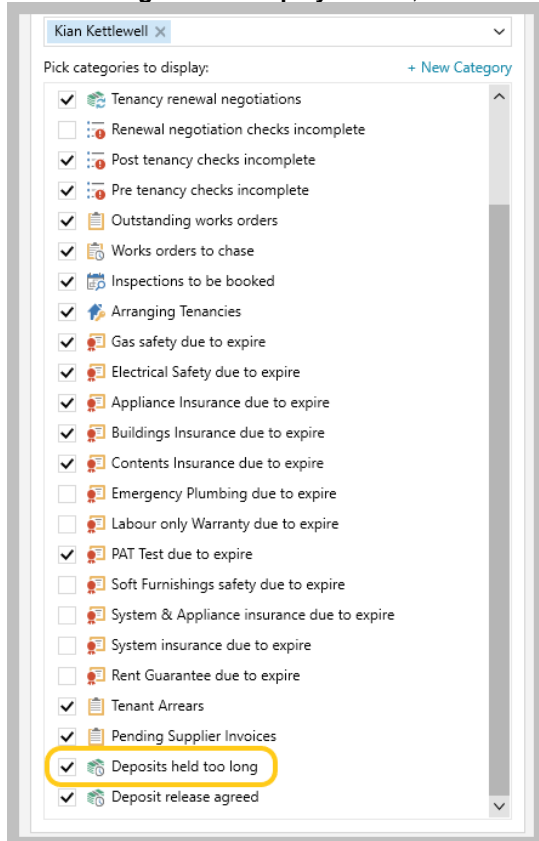
The option needs to be enabled via Panel Setup on the Property Management panel first

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*

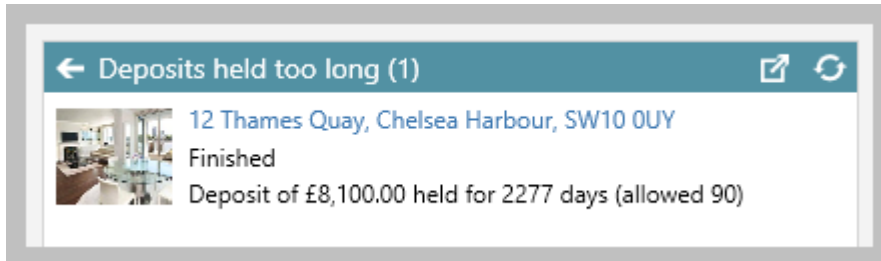
Property Management  		
All	By Office	Select.. ▾
	Notice to quit for tenancies expiring in <u>14</u> days	0
	Tenancies due for renewal in next <u>200</u> days	0
	Check out appointments to book in next <u>0</u> days	0
	Supplier accreditation expiry in <u>30</u> days	--
	Tenancy renewal negotiations	6
	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