Reapit AgencyCloud 12.155 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

Contents

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: v12.155

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

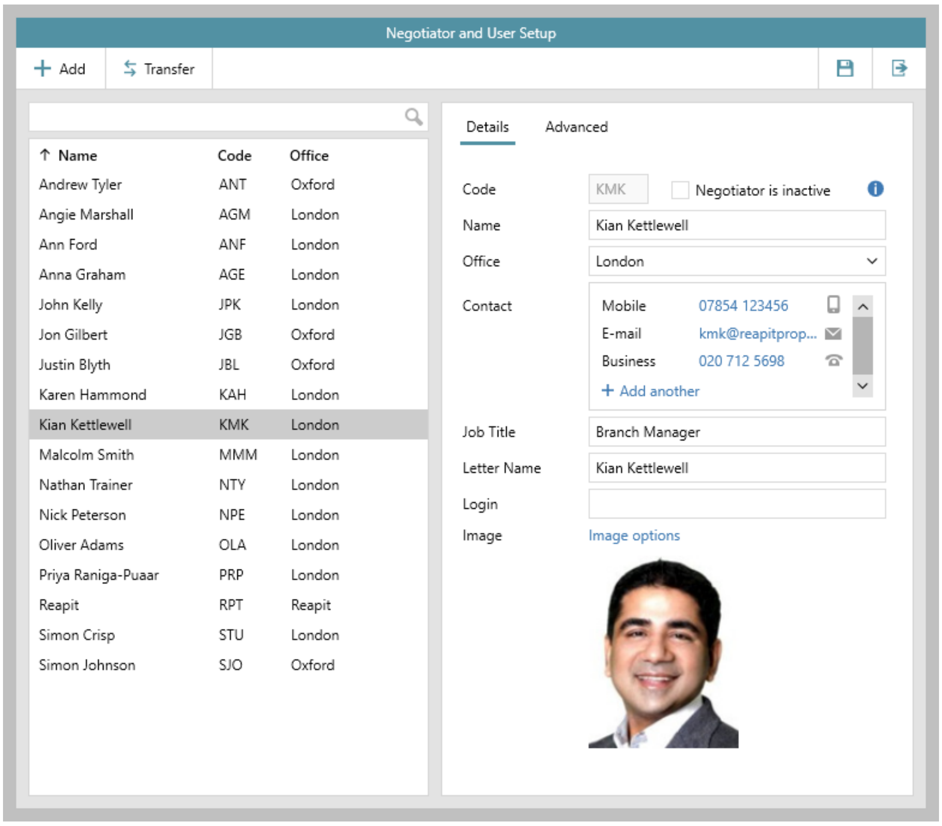
As part of the new user interface (UI) project, the following screen has been redesigned in 12.155 to bring it in line with previously redesigned screens

All existing functionality exists but with a refreshed look and feel

Negotiator and user setup

The negotiator and user setup screen now uses the new UI format

- Click your name/office at the top of the main menu
- Click **Configuration** and select **Setup Negotiators**
- The **Negotiator and User Setup** screen uses the new UI format



The negotiator and user setup screen is one of several configuration areas within AgencyCloud where access can be given to authorised users - for more information on using this screen, see guide on Knowledge Base titled: **Adding a new user, removing a user and transferring data between users**

For more information on further areas within AgencyCloud where access can be given to authorised users, see page titled: **Self service configuration options for AgencyCloud**

Sales & lettings/rentals

Gallery view for property pictures

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

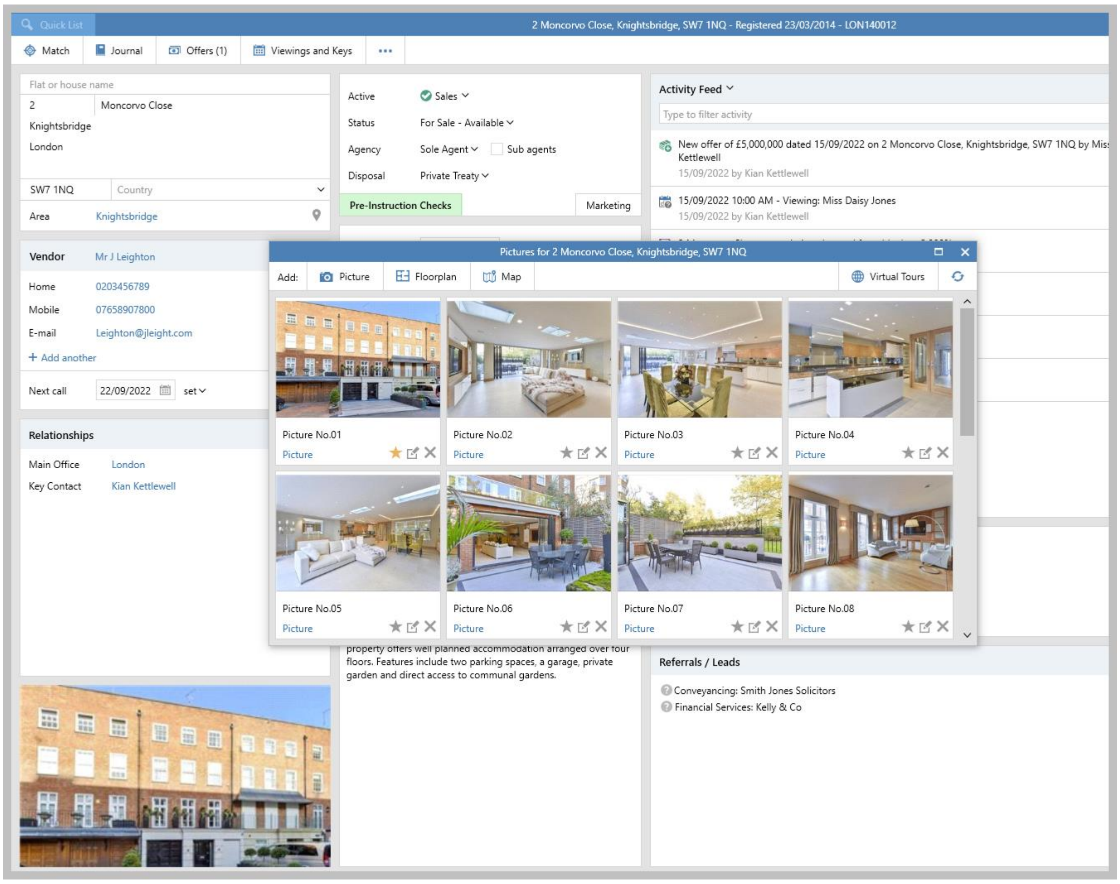
A gallery view is available when viewing property pictures on a property record

The gallery view enlarges images to your full screen, allowing you to scroll through each one, access a slideshow function, open the property details/brochure & display the property location on a map

1. Open pictures window on property record

From property record:

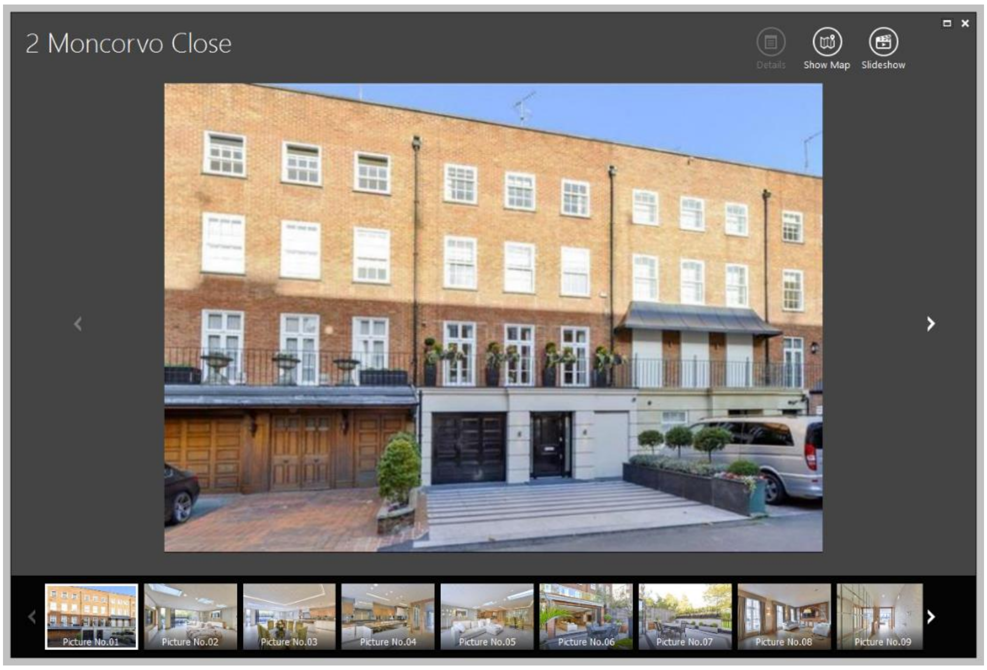
- Click **View pictures**/image (bottom left) to display the pictures window



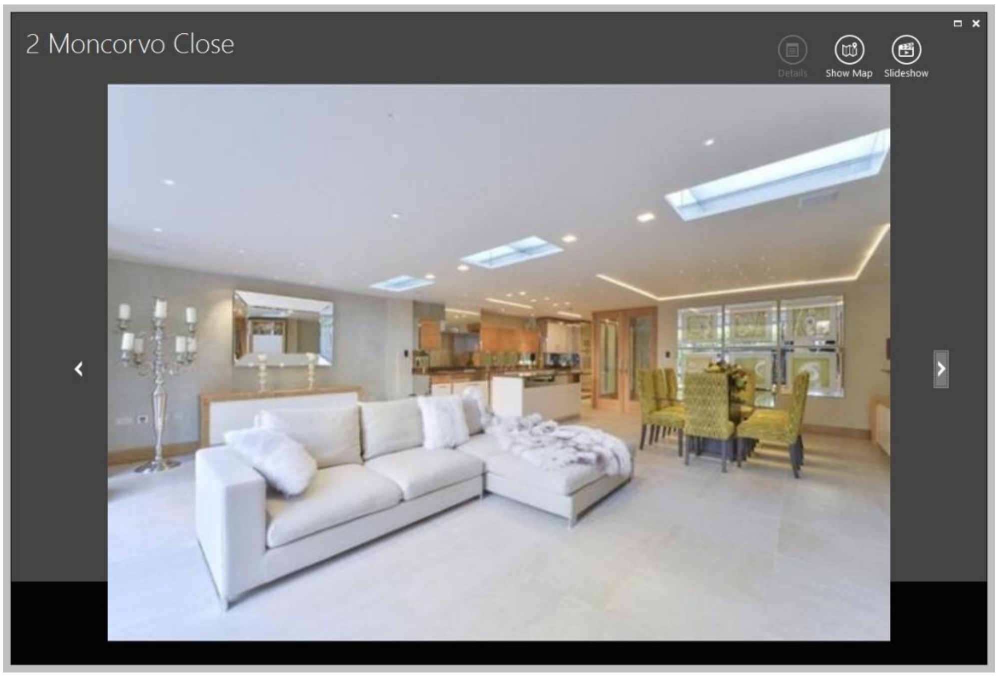
2. Access & use gallery view

From pictures window (shown in step 1 above):

- Click an image
- The gallery view is displayed



- Scroll though the property pictures using arrow buttons on right/left, or click the thumbnail images at the bottom of the screen
- Click the main image to remove the thumbnail images and make the image full screen

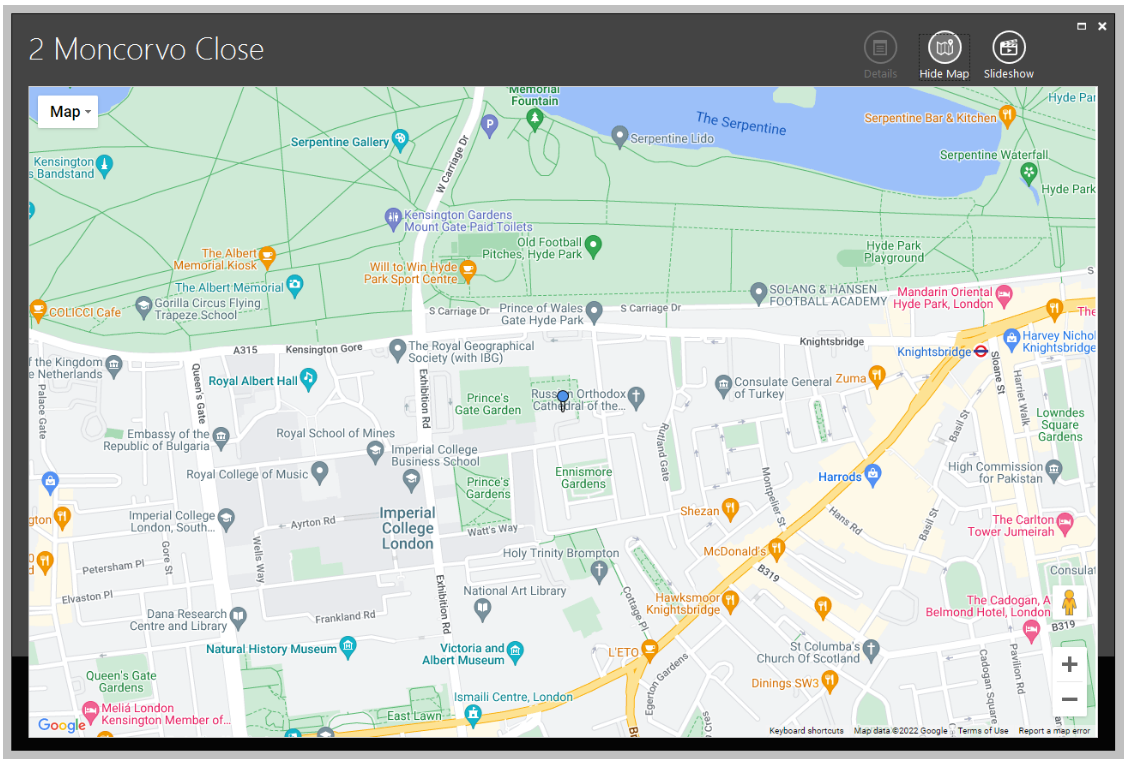


3. Slideshow, Show Map & Details functions

Use buttons top right to access Slideshow, Show Map & Details functions:

- **Slideshow** automatically displays each image (without needing to click arrow/thumbnail)
  *Click **Stop Slideshow** to return to normal view*

- **Show Map** shows the property location on a map
  *Click **Hide Map** to return to normal view*



- Click **Details** to display the property brochure/details
  This option is available when a brochure/details file is stored for the selected property
  *(as **Predefined Details** within the property **Details** screen)*

See guide on Knowledge Base titled **Preparing a property for marketing** for more information on:

- Adding property pictures, section **5. Add photos, floorplans & maps**
- Adding property details/brochure as Predefined Details, section **9. Create brochure**

Activity feed, journal & last call functionality in Internet Registrations (portal leads) screen

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

To aid contact management when dealing with internet registrations/portal leads - from AgencyCloud 12.155+, activity feed functionality has been added to the Internet Registrations screen, allowing journal and last call functionality to be used (as seen throughout AgencyCloud)

When journal entries are added and the lead is converted to an applicant or property (i.e. landlord/vendor), the notes are carried across to the relevant record

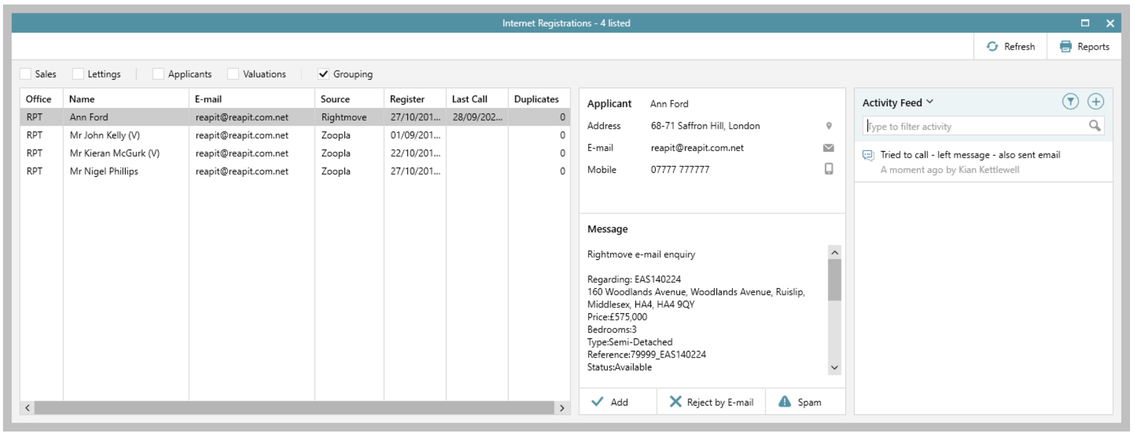
When a portal lead enquiry is sent from a website, such as Rightmove, it is held in the Internet Registrations screen in AgencyCloud - this screen allows you to view enquiry details then either add them as an applicant/property, mark them as a duplicate or reject them

For more information on internet registrations functionality, see Knowledge Base

1. Access internet registrations

From Organiser:

- Click **Internet Registrations** (often shown in **Overview** panel)
  The Internet Registrations screen will be displayed



- The **Activity Feed** is shown on the right side of the screen

- Selecting a lead in the main grid of the window on left displays all journal entries added for that lead in the **Activity Feed**

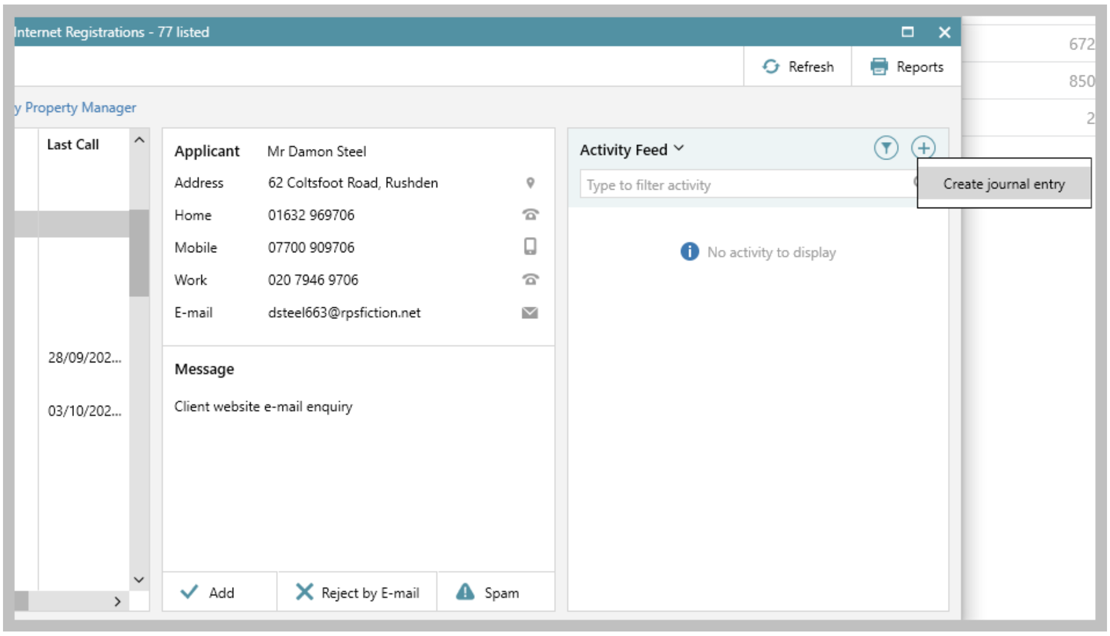
- The grid displays a **Last Call** date for any internet registrations that have had journal entries added

Leads which are still to be followed up will have no **Last Call** date entry - click the column heading to sort by date/no date to easily identify leads which need attention

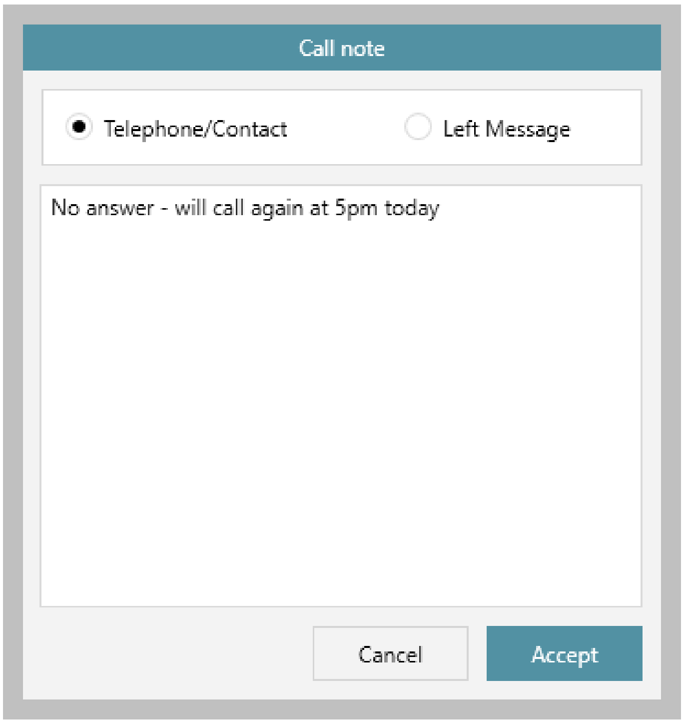
2. Add journal entry to portal lead

From Internet Registrations:

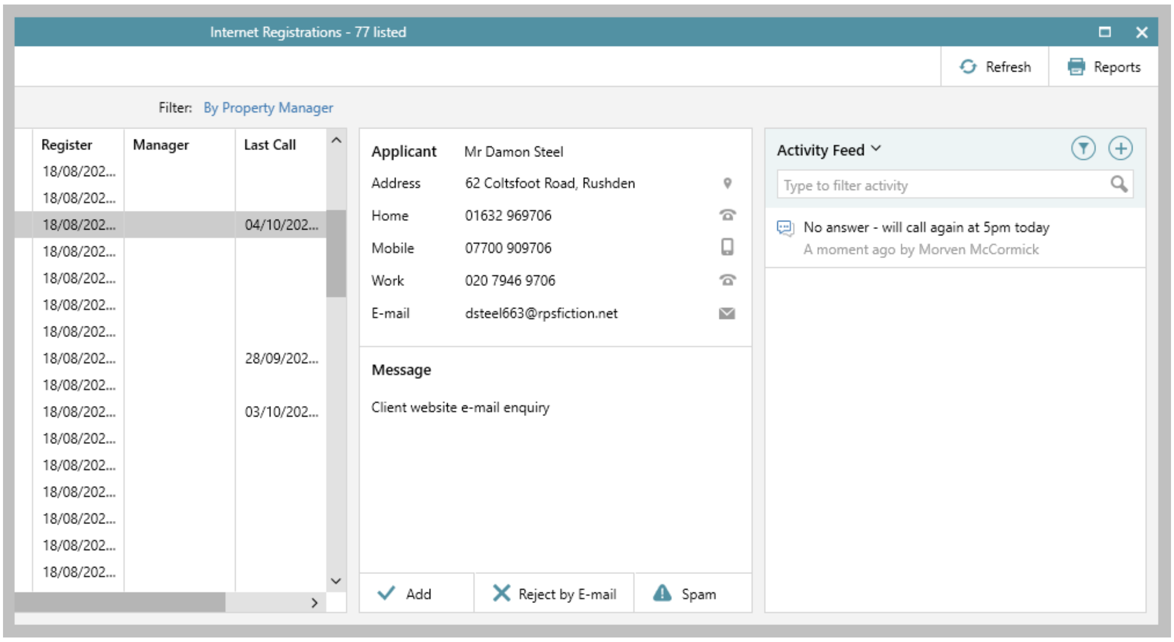
- Select a lead in the main grid of the window (on left)
- In **Activity Feed** on right, click and select **Create journal entry**



- Enter **Call note** and click **Accept**



The note is visible in the **Activity Feed** and the **Last Call** date is updated with the current date



Always show vendor details on external sales property

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

When a sales property is external - by default, details of the external company selling the property is shown - this can be changed to show the vendor details instead

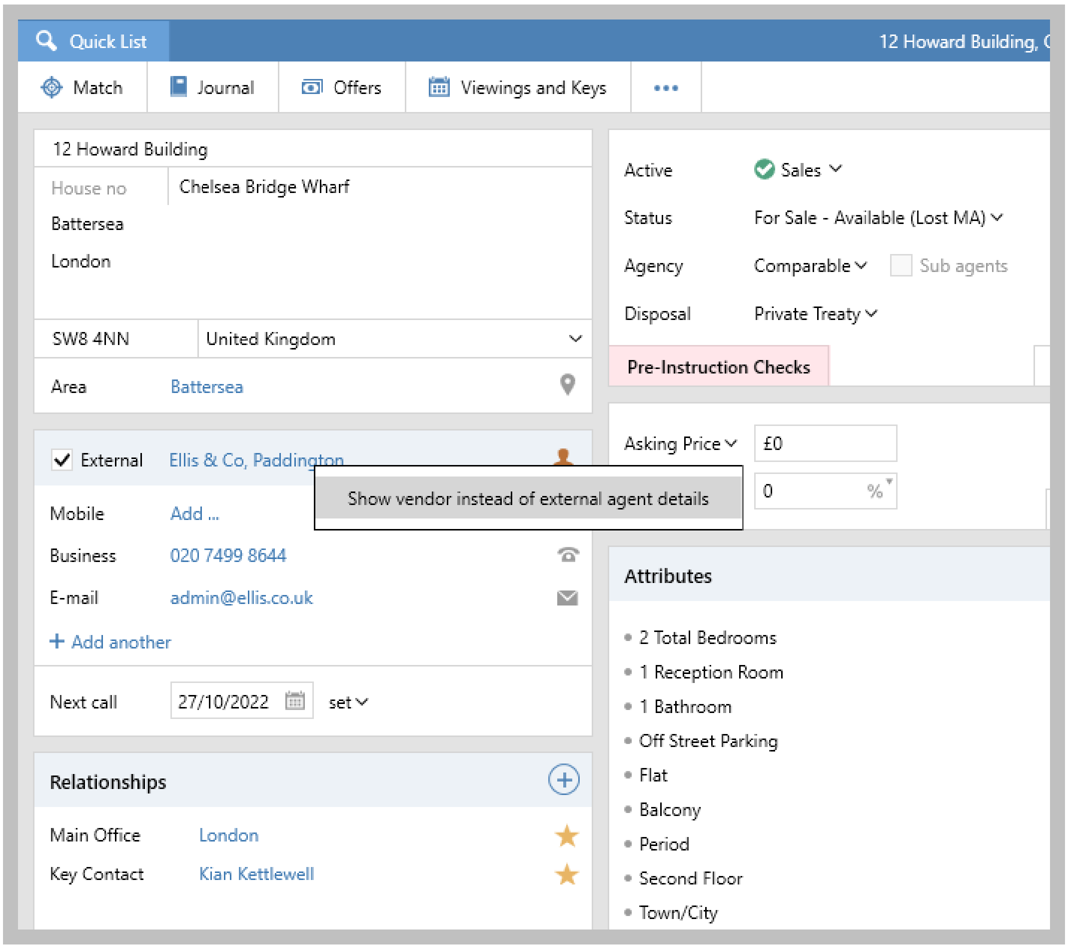
Pre AgencyCloud 12.155, after making the change to view the vendor details on a property, this would only apply for the current session of AgencyCloud - when the application is closed and re-opened, the external agent details on that property will be shown again

From AgencyCloud 12.155+, once the change to show vendor details on a particular external property has been made, this will apply on that property until it is changed again

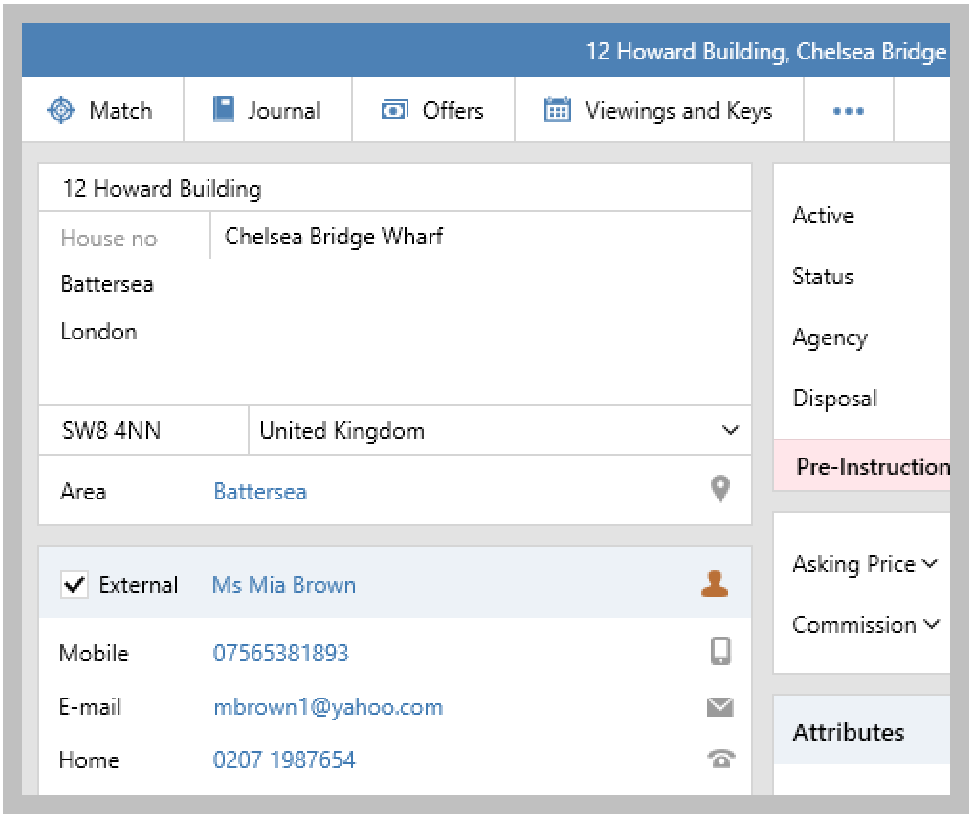
1. Change an external sales property to display vendor details

From property record:

- Right-click over agent/company details and select **Show vendor instead of external agent details**



- The vendor details are now displayed
  To view agent/company details, click the orange contact icon to the right



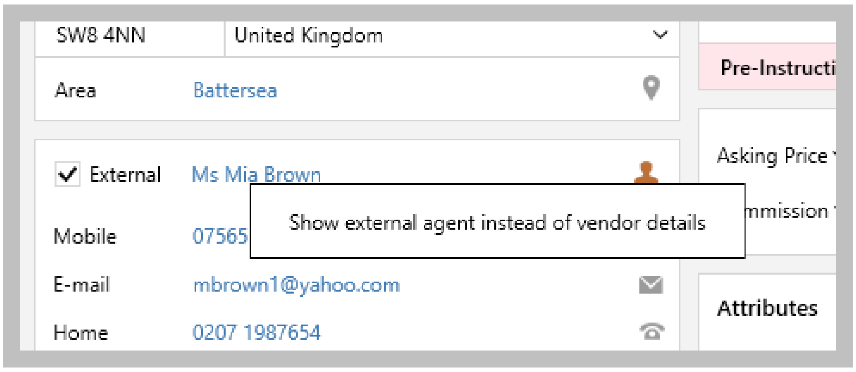
- Save the property record - click **Save** (top right)

  This property will now display vendor details (not agent/company details) to all users until manually changed

2. Show external agent details again

From property record:

- Right-click over agent/company details and select **Show external agent instead of vendor details**



- Save the property record - click **Save** (top right)

Add tenancy/offer from viewing appointment screen (lettings property)

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

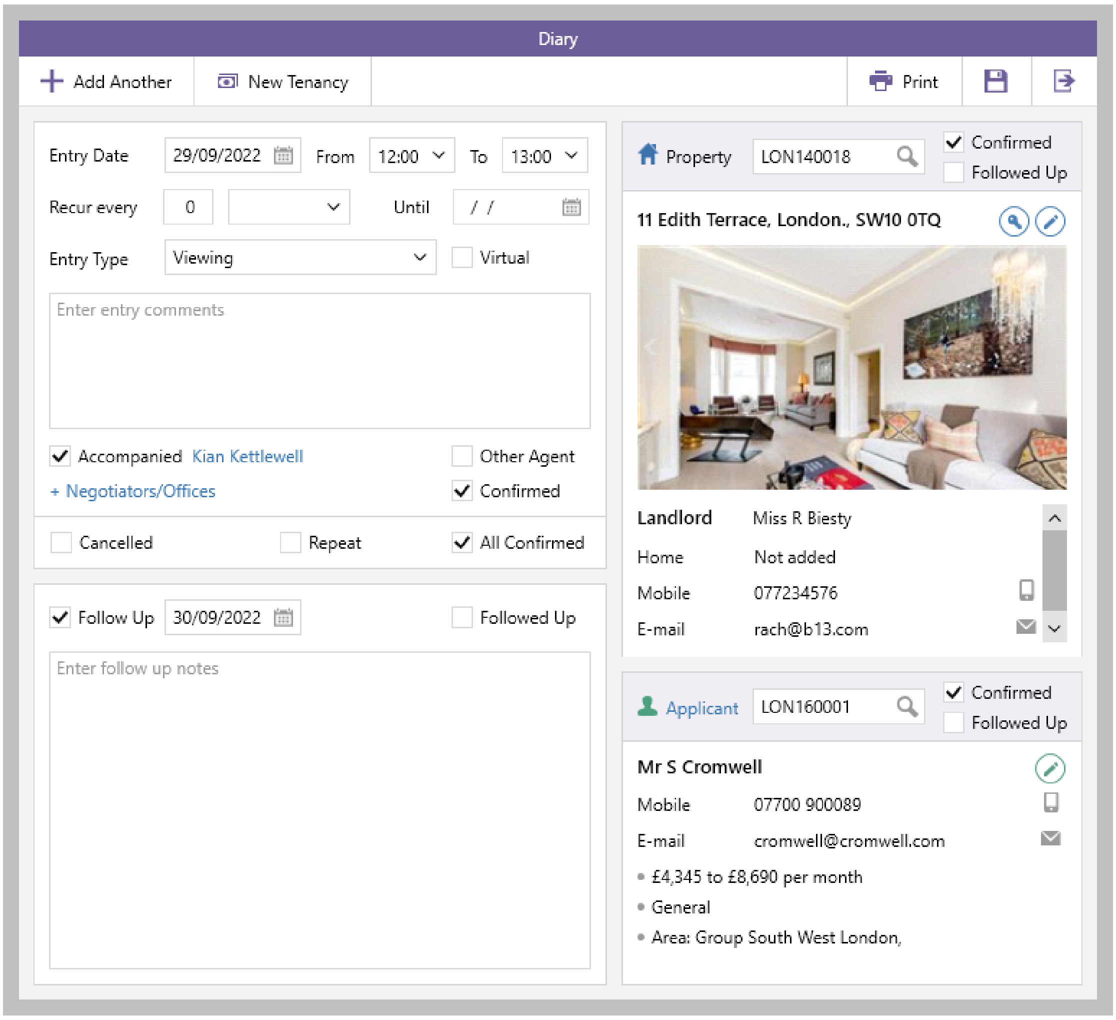
When an applicant who has viewed a lettings property wants to submit an offer or progress with a tenancy, the new offer/tenancy can be added from the relevant viewing appointment screen - this allows an offer to be submitted/new tenancy record created at the point of taking viewing feedback from an applicant

In AgencyCloud 12.154, this functionality was introduced for a sales property viewing appointment (see 12.154 Release Notes on Knowledge Base)

1. Add new offer/tenancy from viewing appointment

From the viewing appointment:

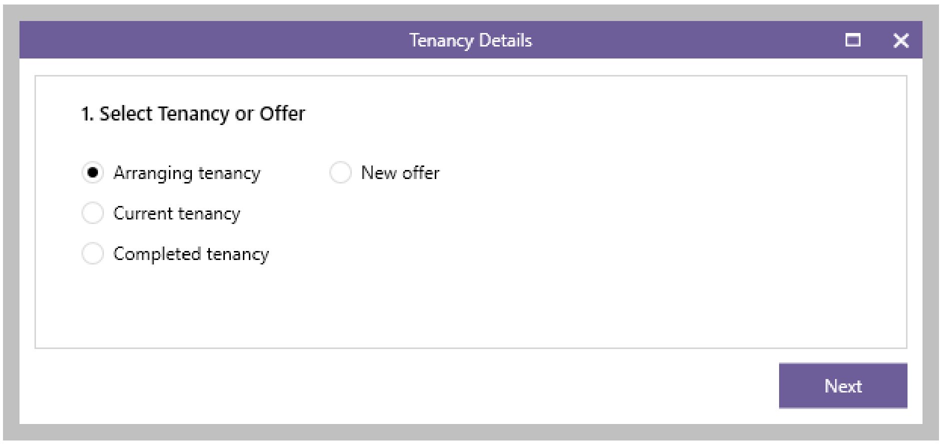
- Click **New Tenancy** (top left)



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

2. Complete new tenancy/offer details

The usual new tenancy/offer wizard screens will be displayed:

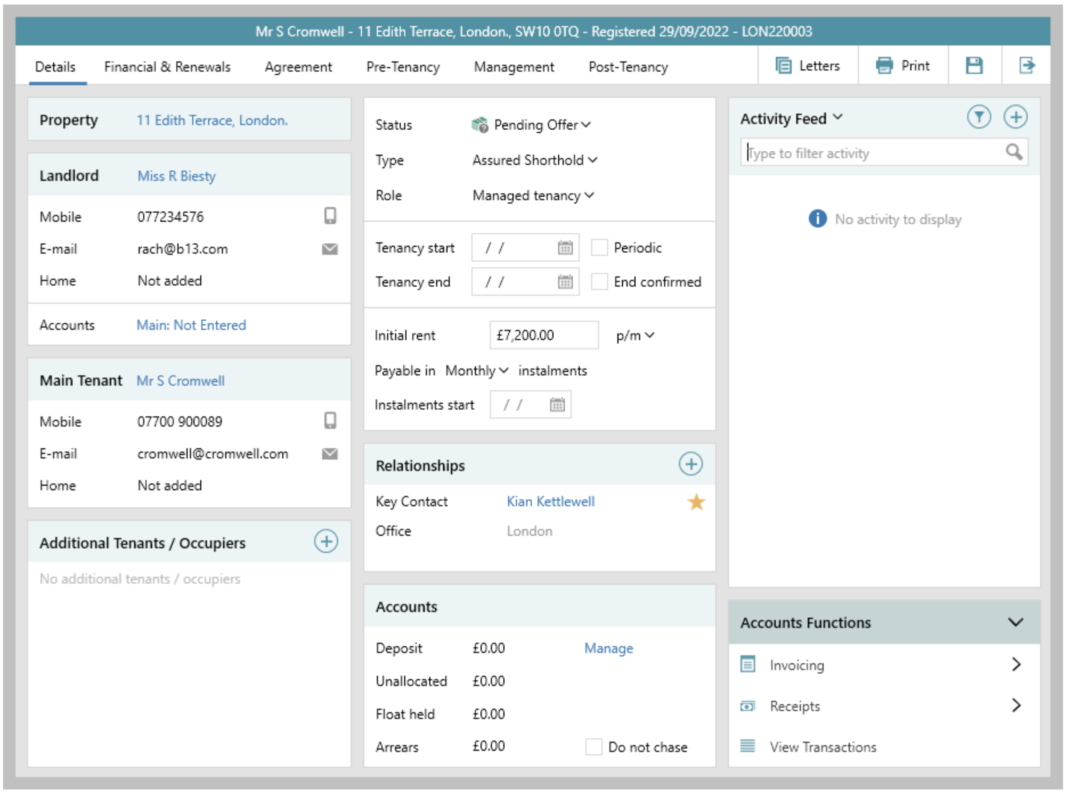


The new tenancy/offer is added for the applicant who viewed the property (as entered onto the viewing appointment screen)

3. New tenancy/offer created

A new tenancy is created (in accordance with the options selected in step 2)

- In this example, a **New offer** was submitted, therefore the tenancy **Status** is **Pending offer** with the offer amount entered as the **Initial rent**



For information on logging a lettings offer, see guide on Knowledge Base titled: **Add a lettings offer & the tenancy screen**

Add occupiers to a sales or lettings property

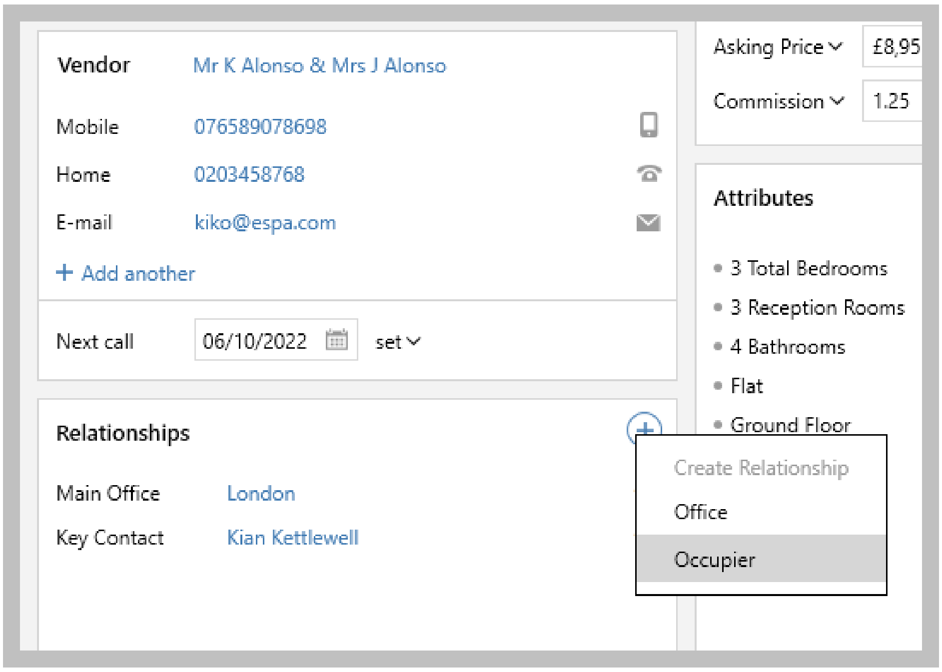
This guide has been reviewed against our global client base and classed as relevant to all regions

When a property being sold/let already has tenants, details of current occupiers can be added to a property record

1. Add occupier(s) to property record

From a sales or lettings property:

- In **Relationships** panel, click
- Select **Occupier**



- The contact search window is displayed - search for contact and double-click when found
  *Or, if not found, click **Add***
- The selected contact is added in the **Relationships** panel as an **Occupier**

- Repeat the above steps to add all occupiers to the property

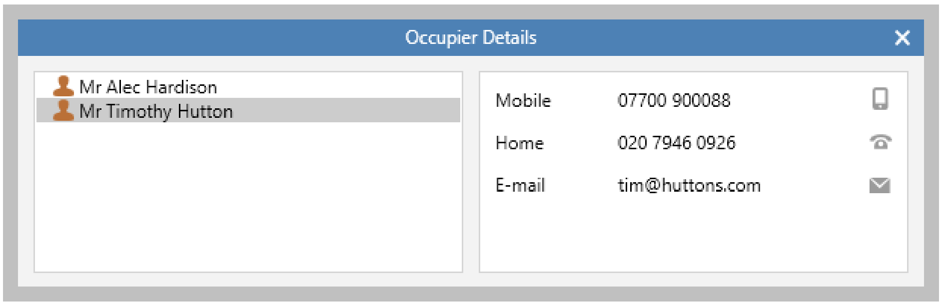
2. Display all occupiers & their contact details

Details of all occupiers can be displayed in one window along with their contact details

From Relationships panel:

- Click contact icon to right of any occupier name

- Details of all occupiers are shown



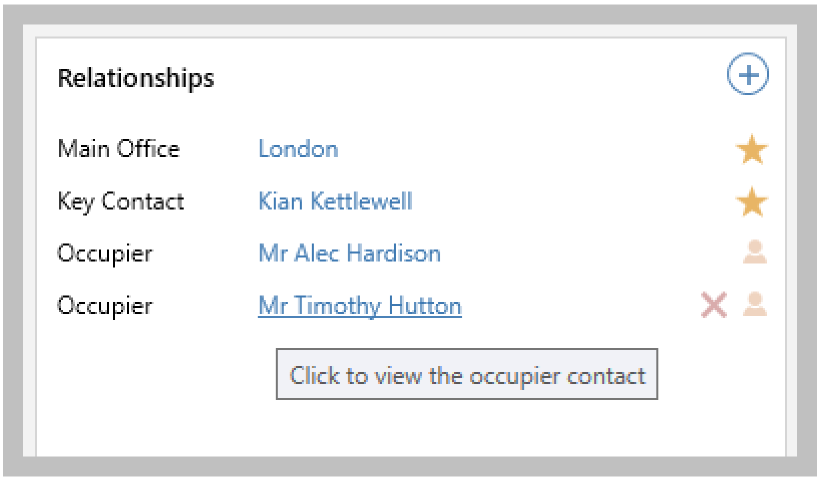
- Select occupier on left to display their details on right
- Icons on right offer options to send an email/text/call or copy the contact number/email address
  The ability to call/text is dependent on configuration

3. Display occupier contact record

An occupier's contact record can be accessed from the Relationships panel

From Relationships panel:

- Click occupier name



- The occupier's contact record is displayed

4. Remove occupier from property

Occupiers can be removed from a property record

From Relationships panel:

- Hover over occupier name (as shown above)
- To right of occupier name, click red cross icon
- A prompt is displayed, click **Yes** to confirm

Identify property inspector as a relationship on tenancy

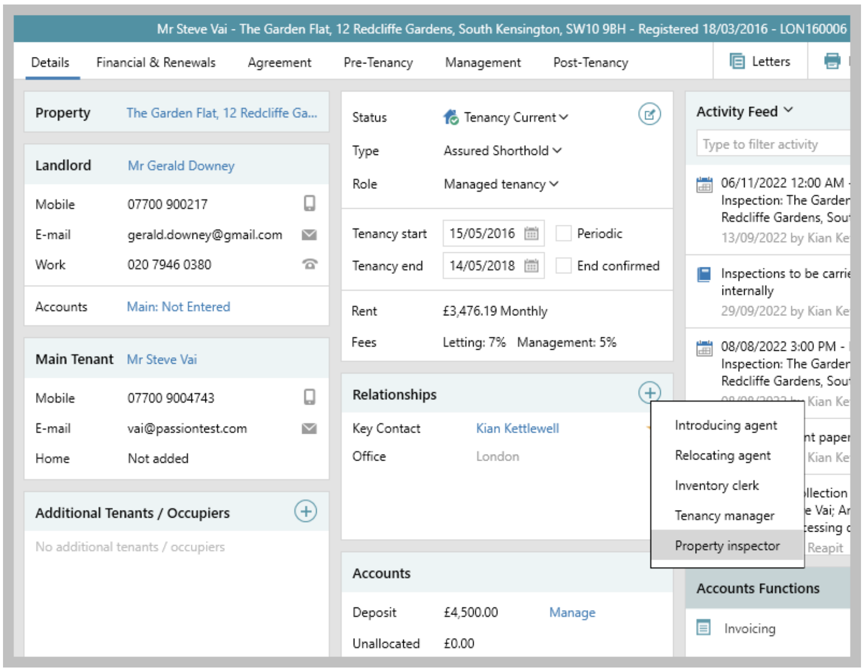
This guide has been reviewed against our global client base and classed as relevant to all regions

When inspections are carried out internally (i.e. not using an external provider), the property inspector can be identified as a relationship on the tenancy

1. Add property inspector to tenancy

From the tenancy:

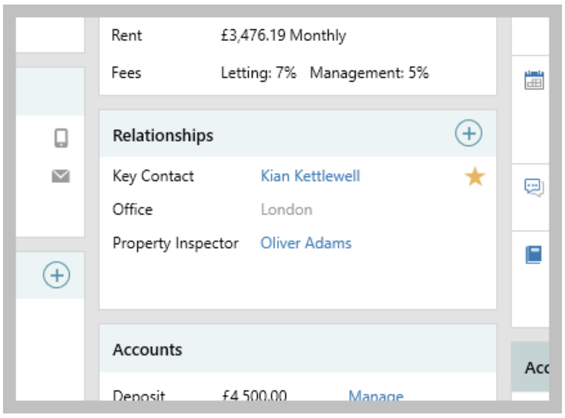
- In the **Relationships** panel, click



- Select **Property inspector** from the list - if the **property inspector** option is not displayed, see step 2

- The **Select Negotiator** window is displayed - tick the name of the relevant AgencyCloud user and click **Select**

- The **Property Inspector** is displayed in the **Relationships** panel

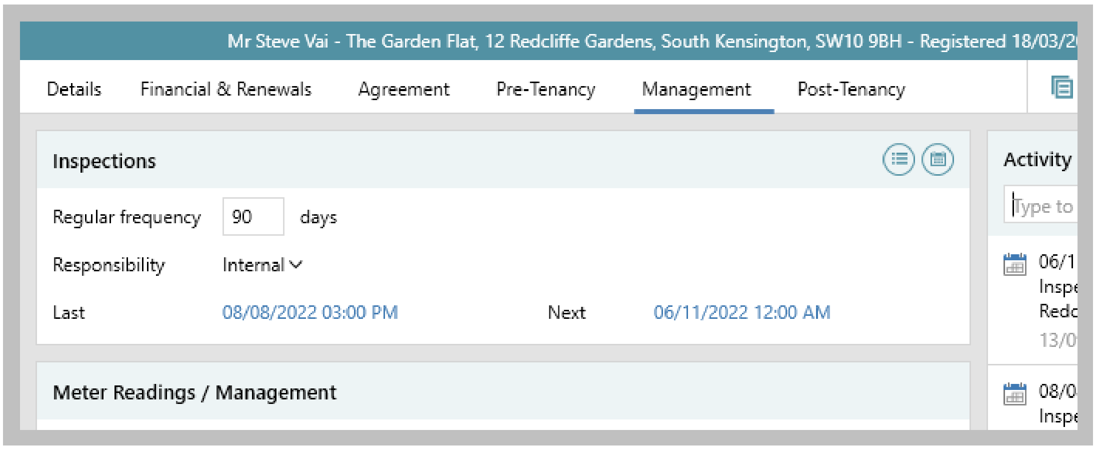


2. If property inspector option is not in the list

The tenancy inspection responsibility setting needs to be identified as internal in order to add an internal property inspector as a relationship on the tenancy

From tenancy:

- Click **Management** tab
- In **Inspections** panel, set **Responsibility** to **Internal**



Go back to **Details** tab, **Relationships** panel to identify the property inspector, as outlined in step 1

Add core suppliers - configuration option

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

A configuration option is available to provide an agent with the ability to identify their own core suppliers - this is in addition (and separate) to the landlord preferred suppliers list identified on each landlord record

When carrying out an action that requires a supplier to be selected - such as when selecting a contractor on a works order or when booking certificates in bulk - a filter to show only core suppliers will be enabled on the company/supplier search

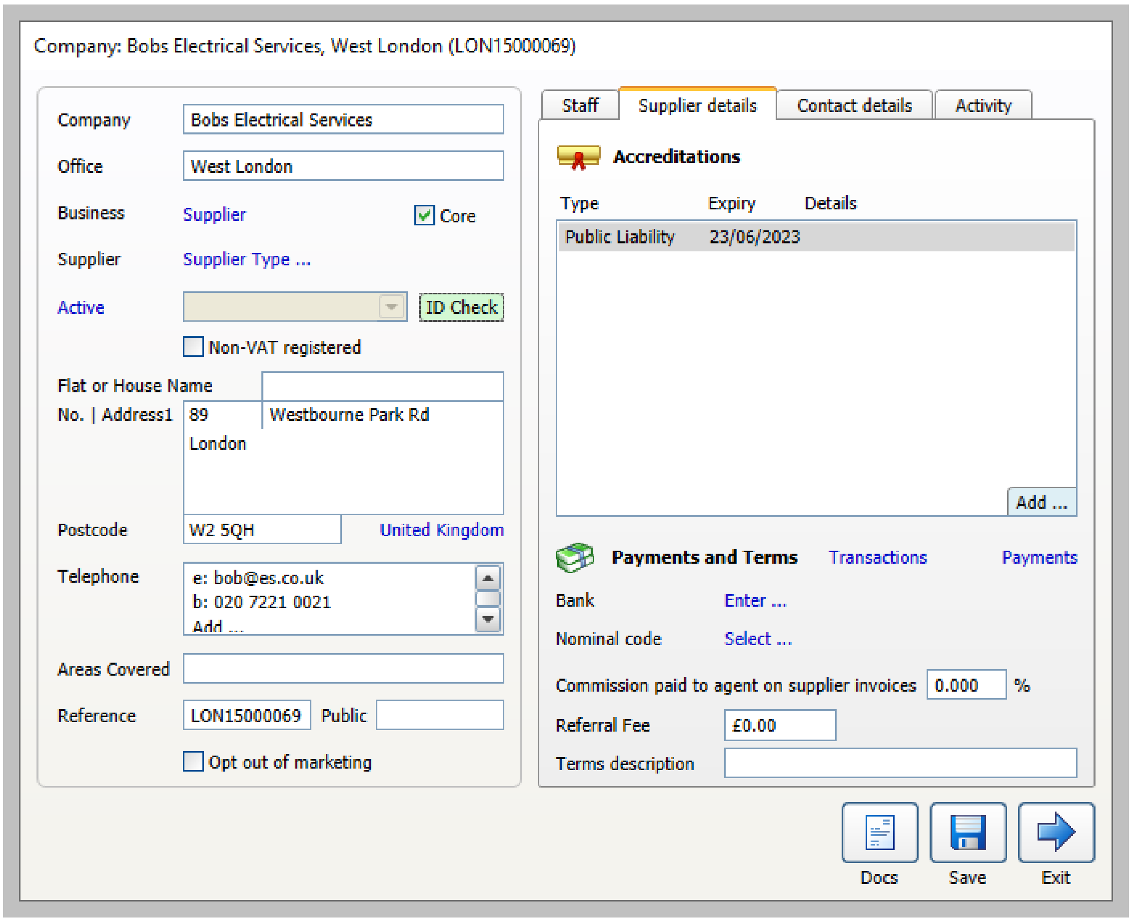
Core suppliers can be reported on via Power Reports

To enable this configuration option, contact Reapit Support

1. Set supplier as a core supplier

From company/supplier:

- Ensure **Business** type is set to **Supplier**
- To the right of **Business** type, tick **Core**
- Click **Save** and **Exit**

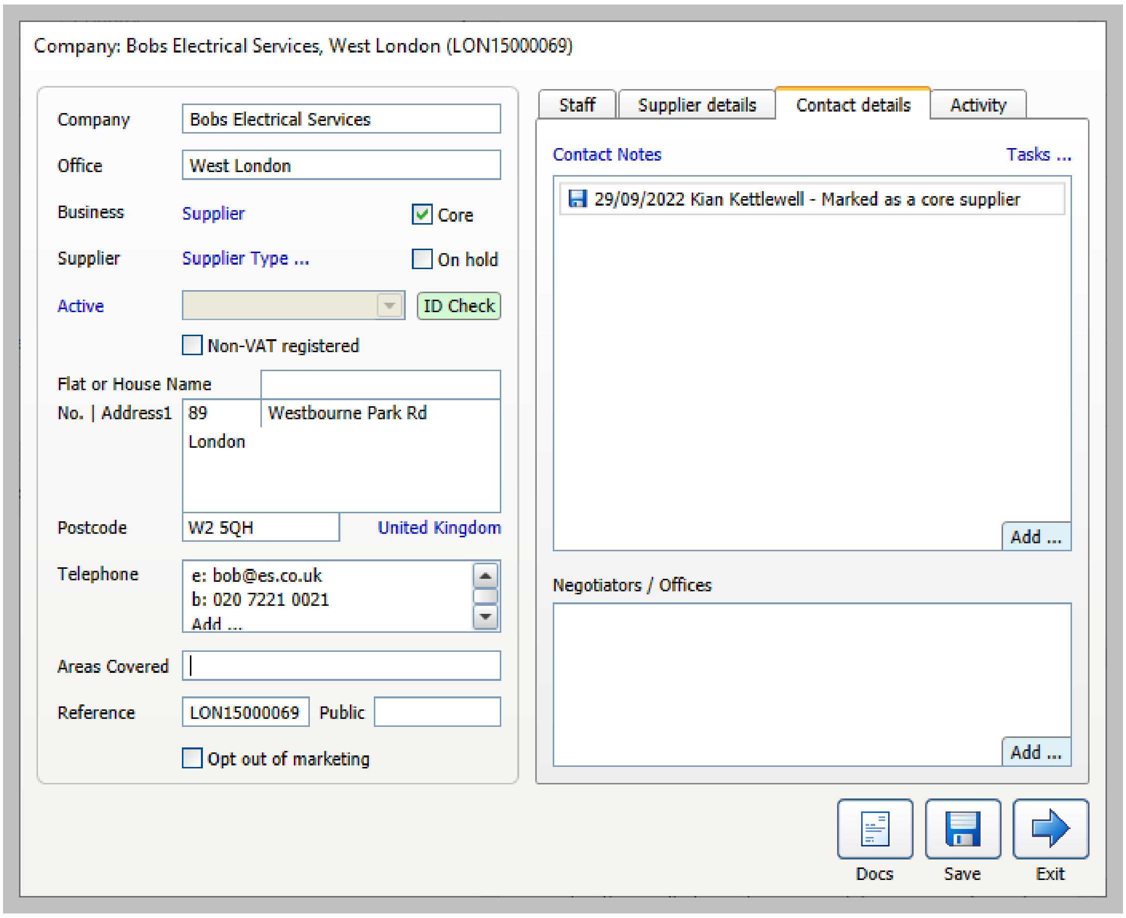


1a. Changes to core supplier setting added to company/supplier journal

When adding/removing the core supplier setting on the company record, this is automatically added to the company/supplier journal

From the company/supplier record:

- Click **Contact details** tab to view journal entries



If journal entries are not shown:

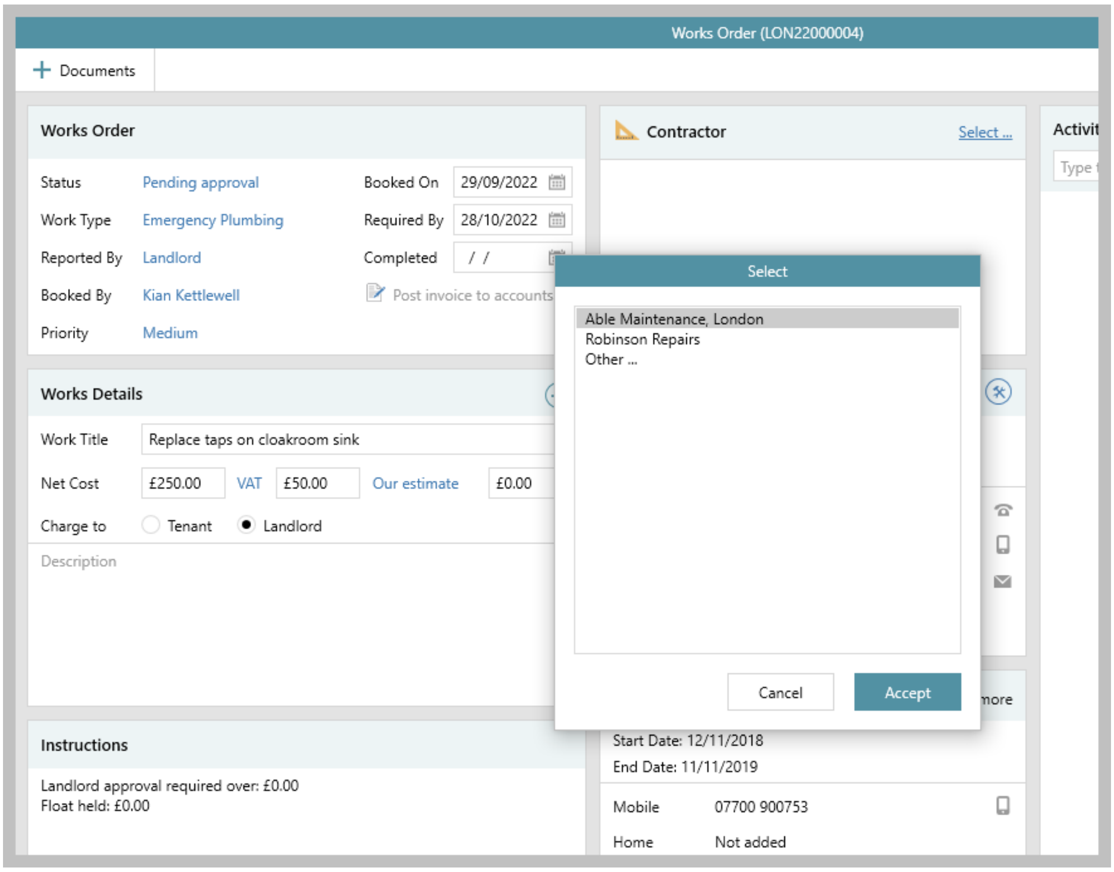
- Click **Contact Notes** and select **Choose entries to view**
- Tick **Detail Change** and click **Accept**
  Journal entries with the type of Detail Change will now be shown which includes changes to the core supplier setting

2. Viewing/using core suppliers in supplier searches

When carrying out an action that requires a supplier to be selected, a filter to show only core suppliers will be enabled on the company/supplier search

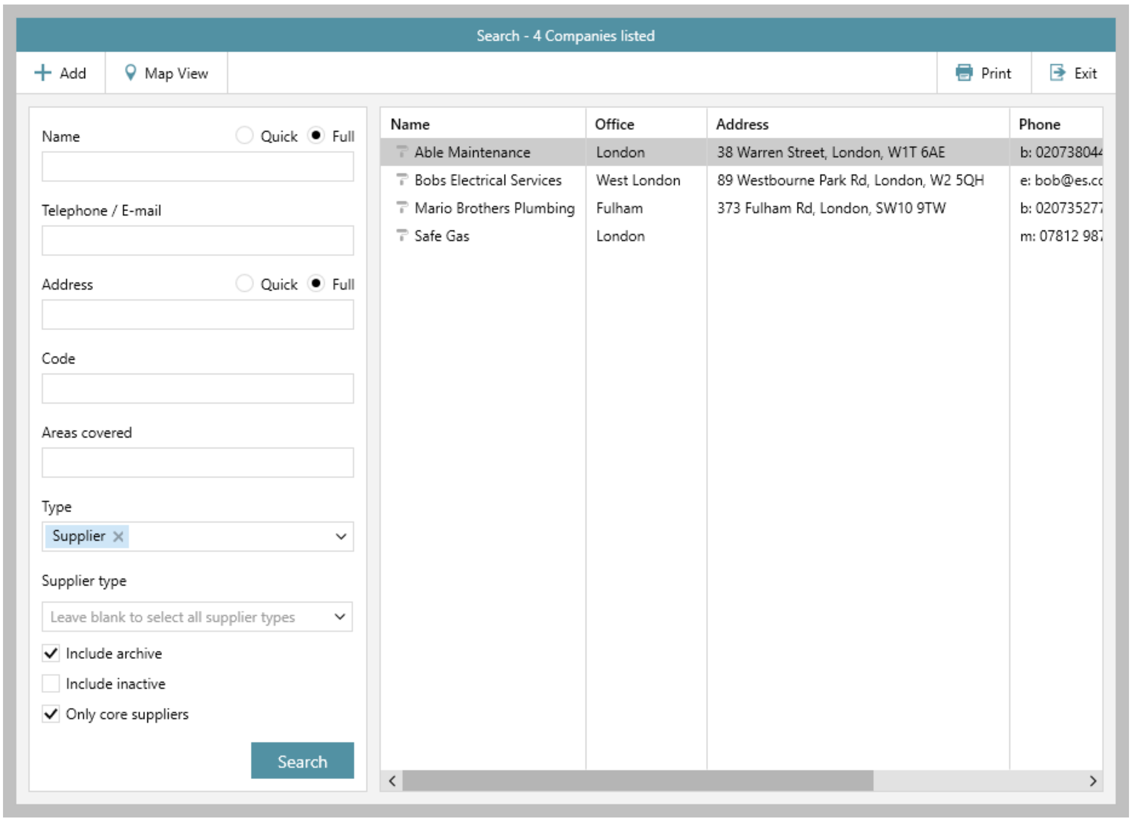
Example - when selecting a supplier for a Works Order:

- In **Contractor** panel, click **Select**



- Where set, the landlord's preferred suppliers are shown first - select **Other** and click **Accept**

- The company search screen is displayed - automatically filtered to show **Suppliers** and **Only core suppliers** (bottom left)

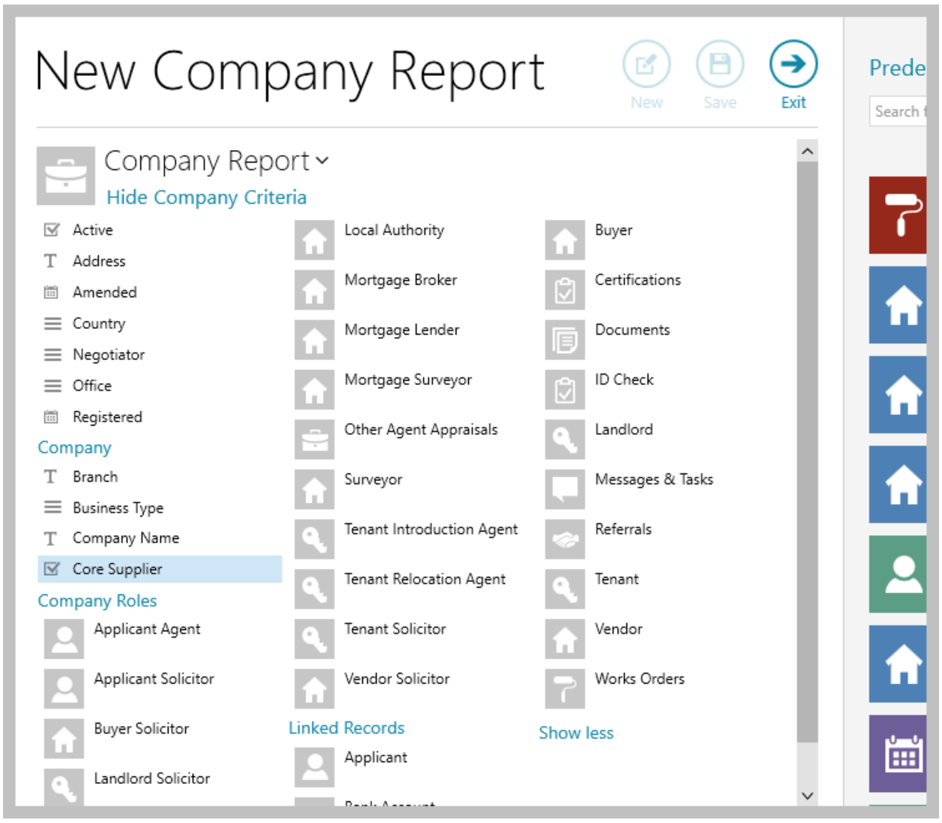


3. Power Reports

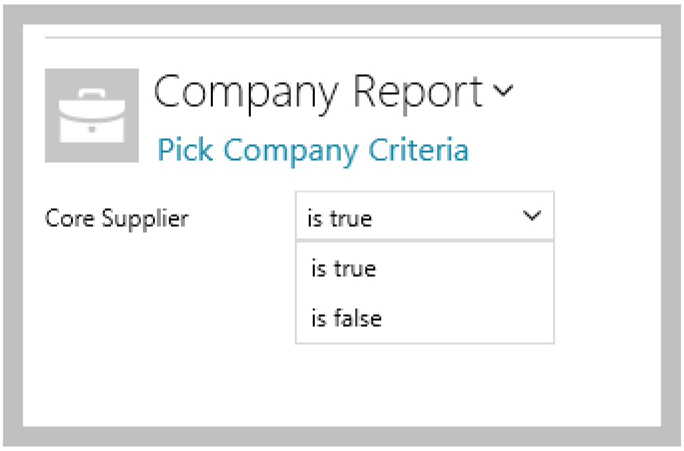
When carrying out company reports, it is possible to report on core suppliers and/or view information on whether the supplier is a core supplier in the report results grid

From Power Reports screen:

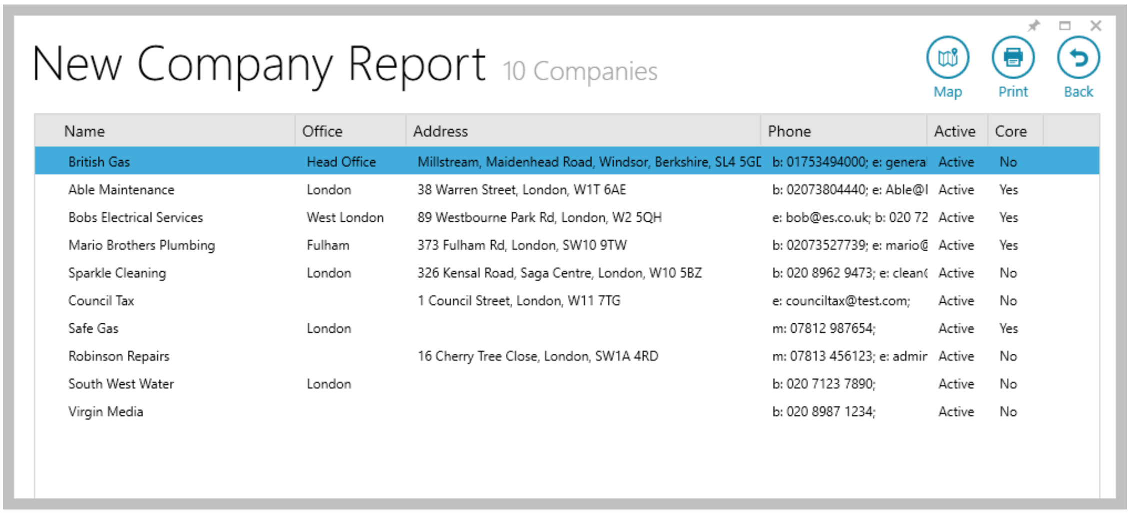
- Select **Company** as the report type and click **Show more**
- In **Company** section, **Core Supplier** can be selected as a report criteria option



- To return just core suppliers in your report, leave **Core Supplier** set to **is true**



- After running a company report, the results grid includes a column titled **Core** which indicates whether a supplier is a core supplier


New Company Report 10 Companies

Map Print Back

Name	Office	Address	Phone	Active	Core
British Gas	Head Office	Millstream, Maidenhead Road, Windsor, Berkshire, SL4 5GD	b: 01753494000; e: genera	Active	No
Able Maintenance	London	38 Warren Street, London, W1T 6AE	b: 02073804440; e: Able@I	Active	Yes
Bobs Electrical Services	West London	89 Westbourne Park Rd, London, W2 5QH	e: bob@es.co.uk; b: 020 72	Active	Yes
Mario Brothers Plumbing	Fulham	373 Fulham Rd, London, SW10 9TW	b: 02073527739; e: mario@	Active	Yes
Sparkle Cleaning	London	326 Kensal Road, Saga Centre, London, W10 5BZ	b: 020 8962 9473; e: clean(	Active	No
Council Tax		1 Council Street, London, W11 7TG	e: counciltax@test.com;	Active	No
Safe Gas	London		m: 07812 987654;	Active	Yes
Robinson Repairs		16 Cherry Tree Close, London, SW1A 4RD	m: 07813 456123; e: admir	Active	No
South West Water	London		b: 020 7123 7890;	Active	No
Virgin Media			b: 020 8987 1234;	Active	No

- Grid functions can be used to sort or group/filter the list according to whether they are a core supplier
    - Click the column heading to sort
    - Click to the right of the column heading for group/filter options

For more information on running Power Reports, see Knowledge Base

'On hold' suppliers - configuration option

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

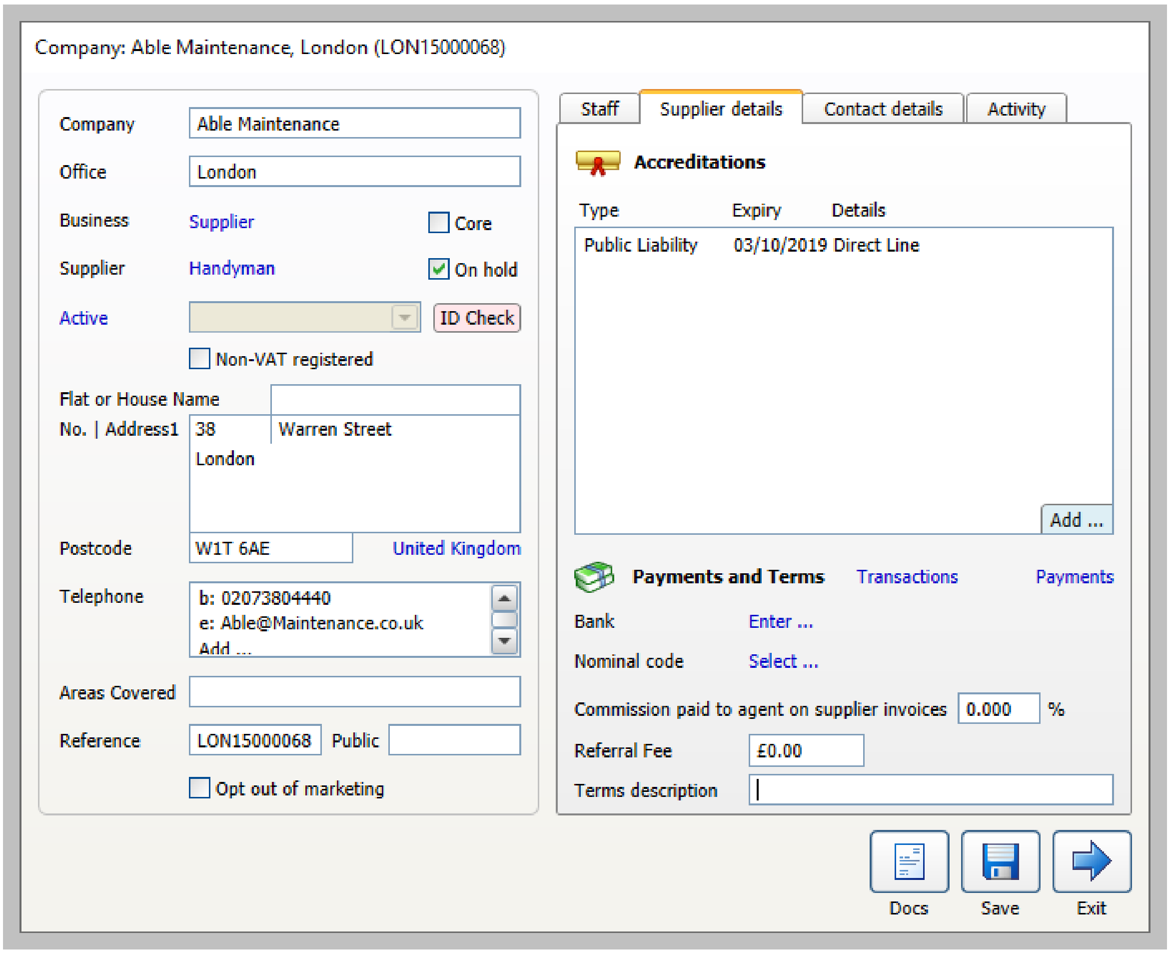
A configuration option is available to allow an agent to mark a supplier as 'on hold' - this prevents users from selecting the supplier via the company/supplier search, such as when adding a contractor to a Works Order

To enable this configuration option, contact Reapit Support

1. Put a company/supplier 'on hold'

From company/supplier record:

- Ensure **Business** type is set to **Supplier**
- To the right of **Supplier** type, tick **On hold**
- Click **Save** and **Exit**



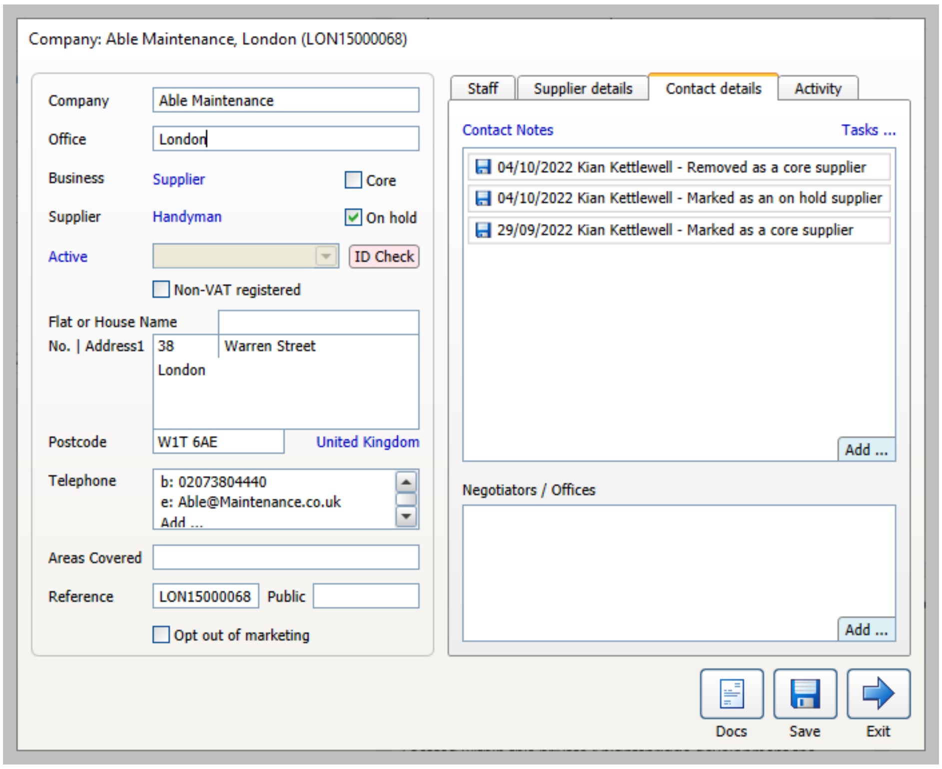
When carrying out an action that requires a supplier to be selected, this supplier will be hidden from the company/supplier search

2. Changes to ‘on hold’ supplier setting added to company/supplier journal

When adding/removing the supplier ‘on hold’ setting on the company record, this is automatically added to the company/supplier journal

From the company/supplier record:

- Click **Contact details** tab to view journal entries



If journal entries are not shown:

- Click **Contact Notes** and select **Choose entries to view**

- Tick **Detail Change** and click **Accept**
Journal entries with the type of Detail Change will now be shown which includes changes to the supplier ‘on hold’ setting

Accounts*

Store documents against bank details

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

From AgencyCloud 12.155, documents can be stored with bank details

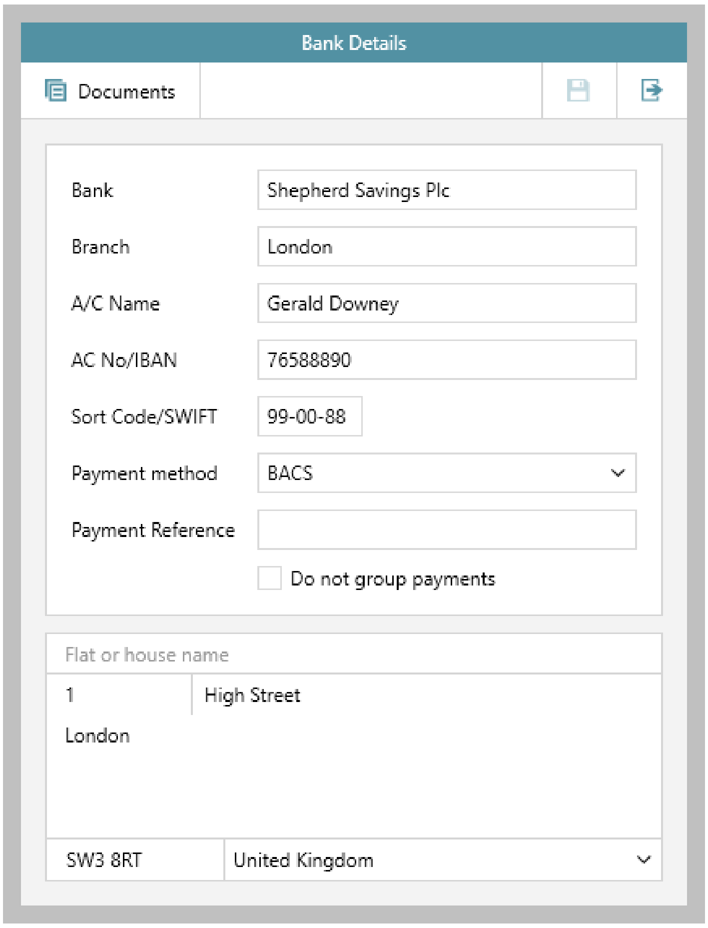
1. Access bank details

From a bank details screen, such as on a landlord or supplier record:

- **Documents** button is available top left

  This option provides access to Document Management functionality (seen throughout AgencyCloud), see step 2

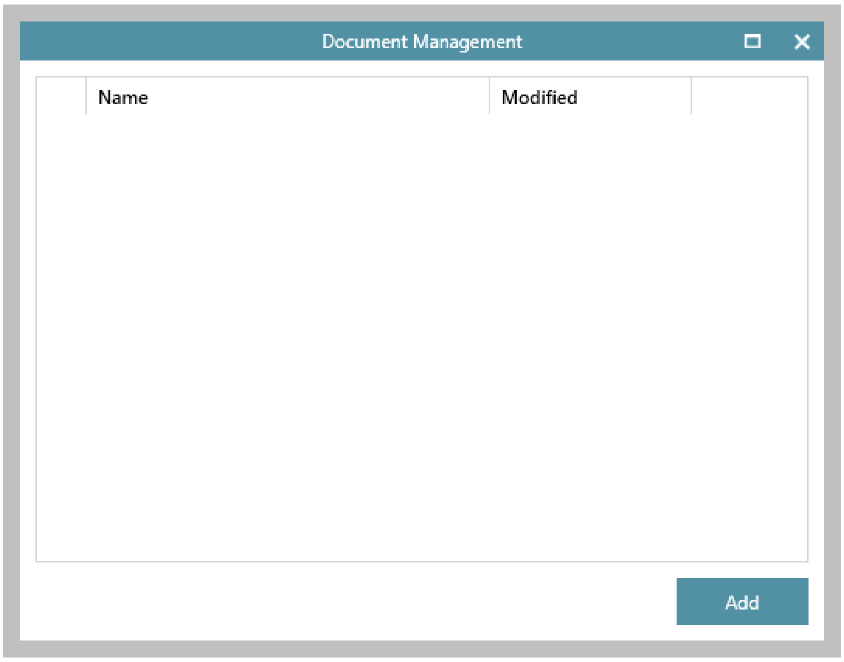
- **Save** button is now available top right on the Bank Details screen



2. Store documents

To store documents:

- Click **Documents**, then click **Add**



OR

- Click and drag the document over the **Documents** button

Automatically produce bank reconciliation report after posting - 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 automatically produces the bank reconciliation report after posting reconciliation items

To enable this configuration option, contact Reapit Support

From Bank Reconciliation:

- After clicking **Post** the report will automatically be displayed
- Further configuration options for the automatically created report are available and can be enabled by Reapit Support, as follows:
  - the report can be generated in Excel or print format
  - unreconciled items can be included in the report

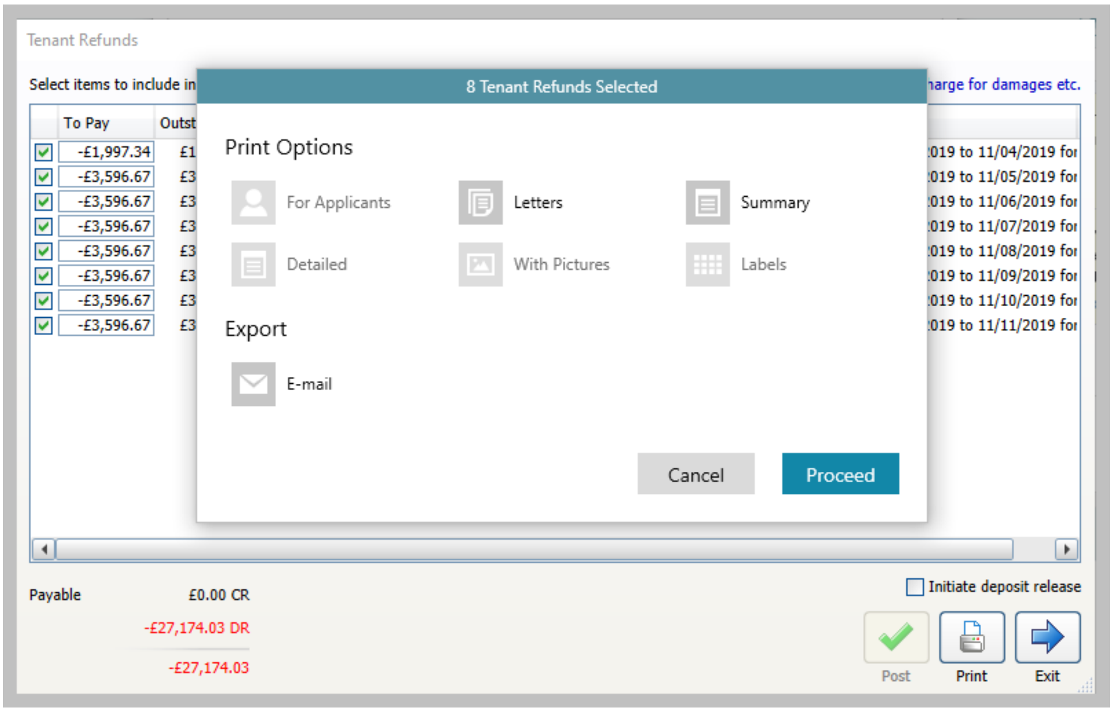
Letter & email options available in tenant refunds/repayments screen

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

When choosing the print option in a tenant refunds/repayments screen - from AgencyCloud 12.155, options to create letters and/or export to email are offered (instead of only showing the report on screen)

From Tenant Refunds/Repayments screen:

- Click **Print**



- Options to create **Letters** and/or export to **Email** are available
- **Summary** displays the report in printable format
  In AgencyCloud pre-12.155, this report was generated when clicking Print

To use specific letter/email templates from the Tenant Refunds screen, contact Reapit Support