

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](#)

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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: v12.155

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

↑ Name	Code	Office
Andrew Tyler	ANT	Oxford
Angie Marshall	AGM	London
Ann Ford	ANF	London
Anna Graham	AGE	London
John Kelly	JPK	London
Jon Gilbert	JGB	Oxford
Justin Blyth	JBL	Oxford
Karen Hammond	KAH	London
Kian Kettlewell	KMK	London
Malcolm Smith	MMM	London
Nathan Trainer	NTY	London
Nick Peterson	NPE	London
Oliver Adams	OLA	London
Priya Raniga-Puaar	PRP	London
Reapit	RPT	Reapit
Simon Crisp	STU	London
Simon Johnson	SJO	Oxford

Details | **Advanced**

Code: Negotiator is inactive ⓘ

Name:

Office:

Contact:

- Mobile: ⓘ
- E-mail: ⓘ
- Business: ⓘ


[+ Add another](#)

Job Title:

Letter Name:

Login:

Image: [Image options](#)



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:

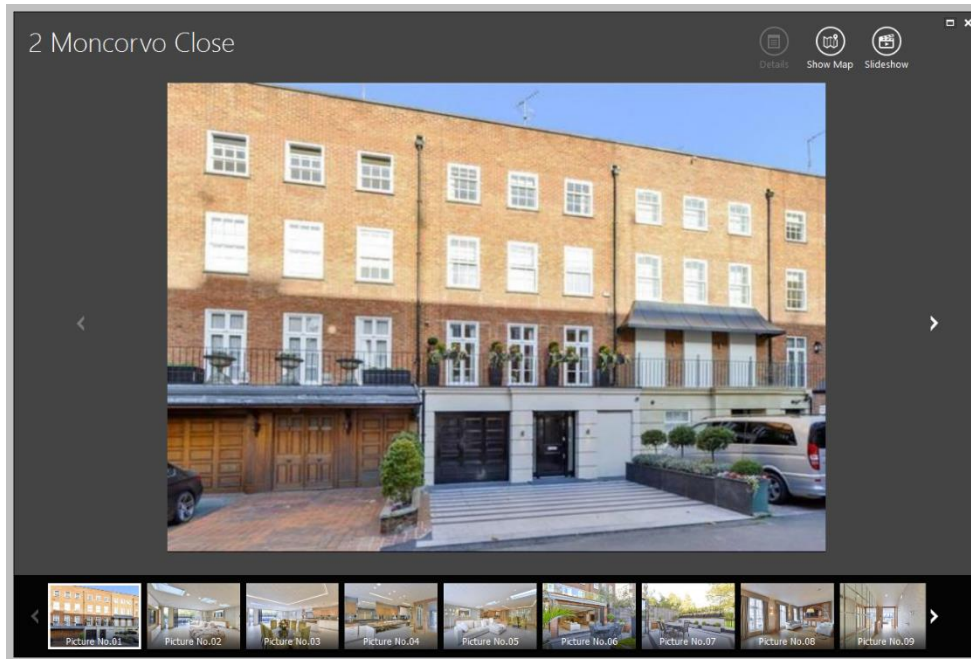
- Click **View pictures/image** (bottom left) to display the pictures window

The screenshot displays a property record for '2 Moncorvo Close, Knightsbridge, SW7 1NQ'. The interface includes a top navigation bar with 'Quick List', 'Match', 'Journal', 'Offers (1)', and 'Viewings and Keys'. The main content area is divided into several sections: 'Flat or house name' (2 Moncorvo Close, Knightsbridge, London, SW7 1NQ), 'Active' status (For Sale - Available), 'Agency' (Sole Agent), and 'Disposal' (Private Treaty). An 'Activity Feed' on the right shows a new offer of £5,000,000 dated 15/09/2022. A 'Vendor' section lists Mr. J. Leighton with contact details. A 'Relationships' section lists the Main Office as London and the Key Contact as Kian Kettlewell. The 'Pictures for 2 Moncorvo Close, Knightsbridge, SW7 1NQ' window is open, showing a grid of eight images (Picture No.01 to No.08) with options to star, share, or delete each image. Below the gallery, there is a description of the property: 'property offers well planned accommodation arranged over four floors. Features include two parking spaces, a garage, private garden and direct access to communal gardens.' A 'Referrals / Leads' section lists 'Conveyancing: Smith Jones Solicitors' and 'Financial Services: Kelly & Co'. A large image of the property's exterior is visible at the bottom left of the main record area.

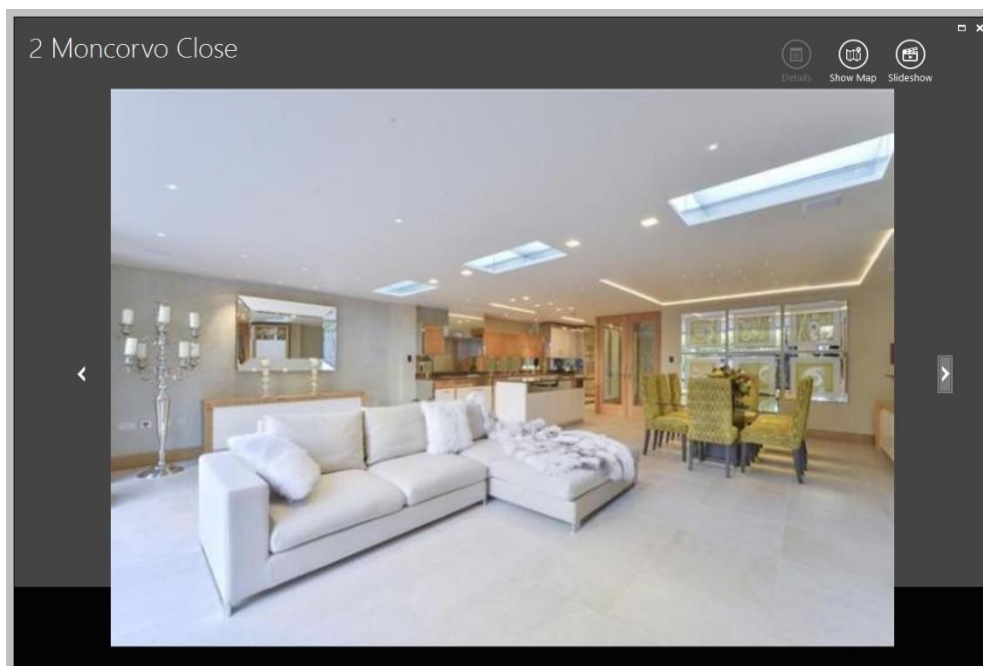
2. Access & use gallery view

From pictures window (shown in step 1 above):

- Click an image
- The gallery view is displayed



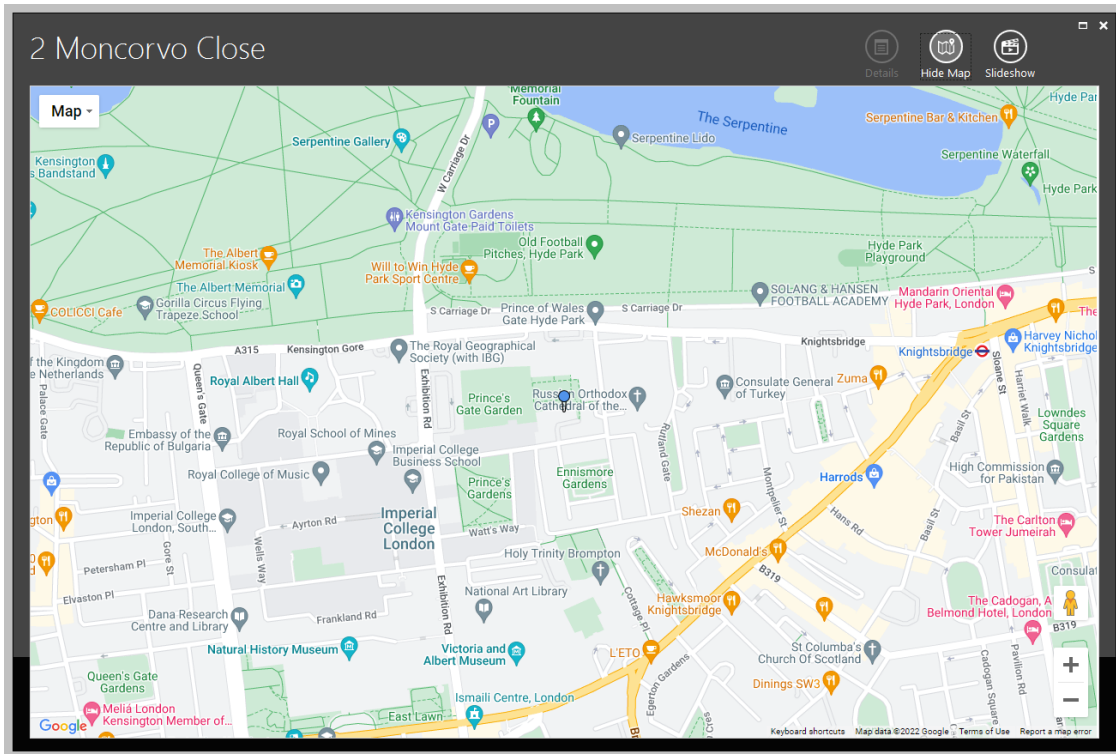
- Scroll through the property pictures using arrow buttons on right/left, or click the thumbnail images at the bottom of the screen
- Click the main image to remove the thumbnail images and make the image full screen



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/thumbnailed)
*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

Office	Name	E-mail	Source	Register	Last Call	Duplicates
RPT	Ann Ford	reapit@reapit.com.net	Rightmove	27/10/201...	28/09/202...	0
RPT	Mr John Kelly (V)	reapit@reapit.com.net	Zoopla	01/09/201...		0
RPT	Mr Kieran McGurk (V)	reapit@reapit.com.net	Zoopla	22/10/201...		0
RPT	Mr Nigel Phillips	reapit@reapit.com.net	Zoopla	27/10/201...		0

Applicant Ann Ford
Address 68-71 Saffron Hill, London
E-mail reapit@reapit.com.net
Mobile 07777 777777

Message
Rightmove e-mail enquiry
Regarding: EAS140224
160 Woodlands Avenue, Woodlands Avenue, Ruslip,
Middlesex, W14, HA4 9QV
Price:£575,000
Bedrooms:3
Type:Semi-Detached
Reference:79999_EAS140224
Status:Available

Activity Feed
Type to filter activity
Tried to call - left message - also sent email
A moment ago by Kian Kettlewell


✓ Add ✗ Reject by E-mail 🗑️ Spam

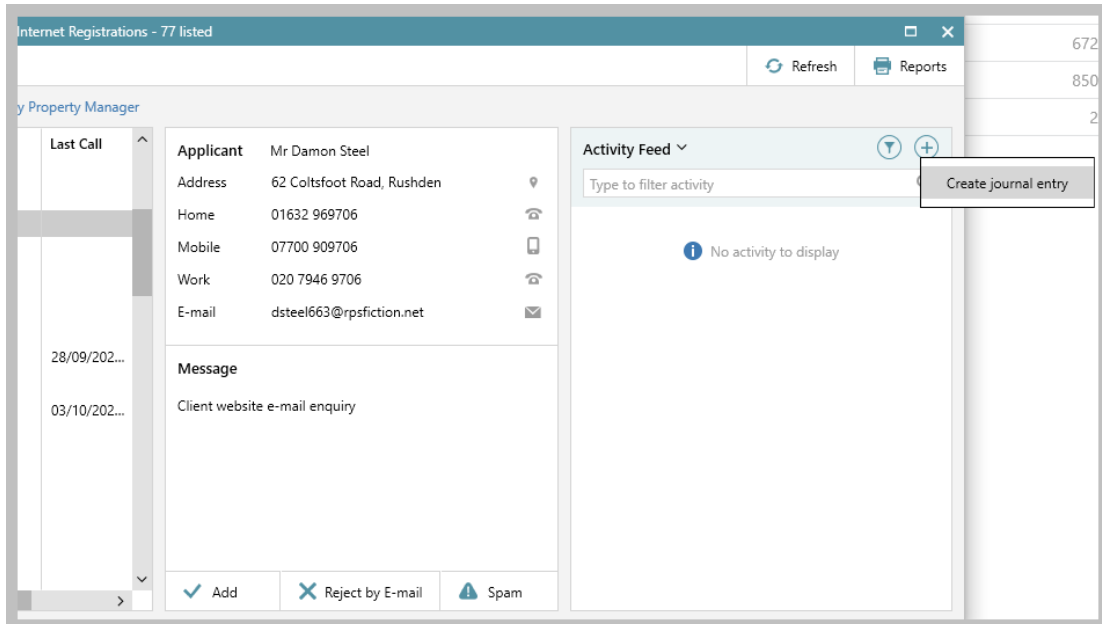
- The **Activity Feed** is shown on the right side of the screen
- Selecting a lead in the main grid of the window on left displays all journal entries added for that lead in the **Activity Feed**
- The grid displays a **Last Call** date for any internet registrations that have had journal entries added

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

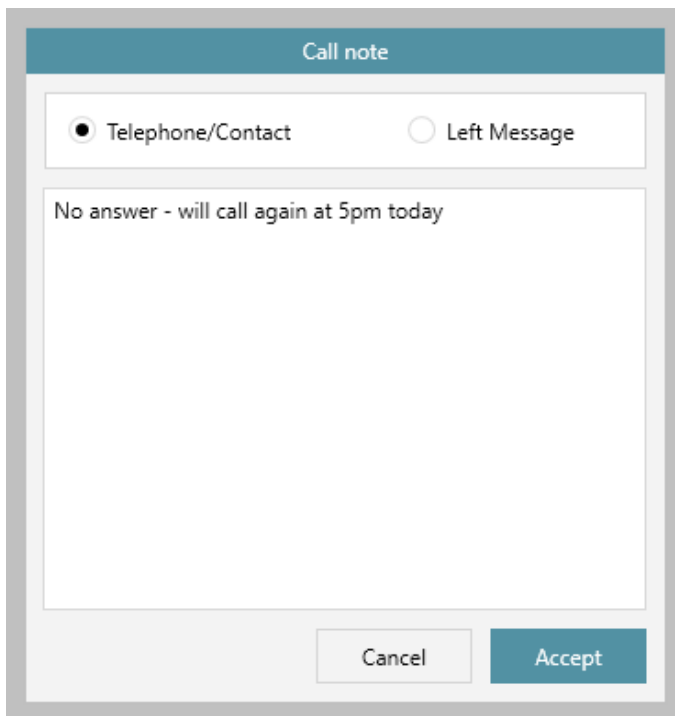
2. Add journal entry to portal lead

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

The screenshot displays a web application interface for managing internet registrations. At the top, a header bar shows "Internet Registrations - 77 listed" and includes "Refresh" and "Reports" buttons. Below the header, a filter is set to "By Property Manager".

Register	Manager	Last Call
18/08/202...		
18/08/202...		
18/08/202...		04/10/202...
18/08/202...		
18/08/202...		
18/08/202...		
18/08/202...		28/09/202...
18/08/202...		
18/08/202...		03/10/202...
18/08/202...		
18/08/202...		
18/08/202...		
18/08/202...		
18/08/202...		
18/08/202...		
18/08/202...		

The detailed view for the selected registration shows the following information:

- Applicant:** Mr Damon Steel
- Address:** 62 Coltsfoot Road, Rushden
- Home:** 01632 969706
- Mobile:** 07700 909706
- Work:** 020 7946 9706
- E-mail:** dsteel663@rpsfiction.net

Message: Client website e-mail enquiry

Activity Feed: No answer - will call again at 5pm today (A moment ago by Morven McCormick)

At the bottom of the detailed view, there are three buttons: "Add", "Reject by E-mail", and "Spam".

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:

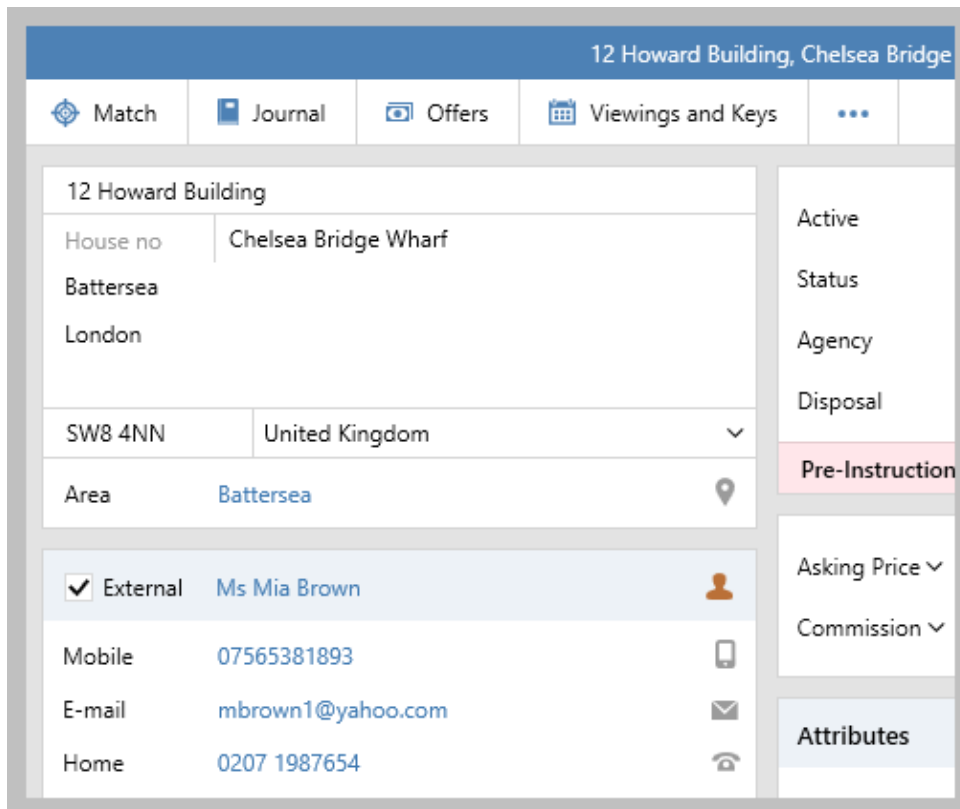
- Right-click over agent/company details and select **Show vendor instead of external agent details**

The screenshot displays the AgencyCloud interface for a property record. The top navigation bar shows 'Quick List' and '12 Howard Building, C'. Below this, there are tabs for 'Match', 'Journal', 'Offers', and 'Viewings and Keys'. The main content area is divided into several sections:

- Property Details:** 12 Howard Building, House no: Chelsea Bridge Wharf, Battersea, London, SW8 4NN, United Kingdom, Area: Battersea.
- Agent/Company Details:** External, Ellis & Co, Paddington. Contact information includes Mobile (Add ...), Business (020 7499 8644), and E-mail (admin@ellis.co.uk). A 'Next call' date of 27/10/2022 is also shown.
- Relationships:** Main Office: London, Key Contact: Kian Kettlewell.
- Attributes:** 2 Total Bedrooms, 1 Reception Room, 1 Bathroom, Off Street Parking, Flat, Balcony, Period, Second Floor, Town/City.

A context menu is open over the agent name 'Ellis & Co, Paddington', with the option 'Show vendor instead of external agent details' highlighted.

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



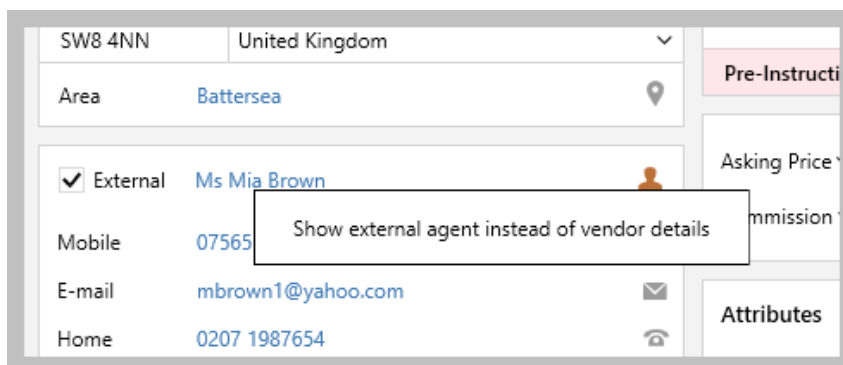
- Save the property record - click **Save** (top right)

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)

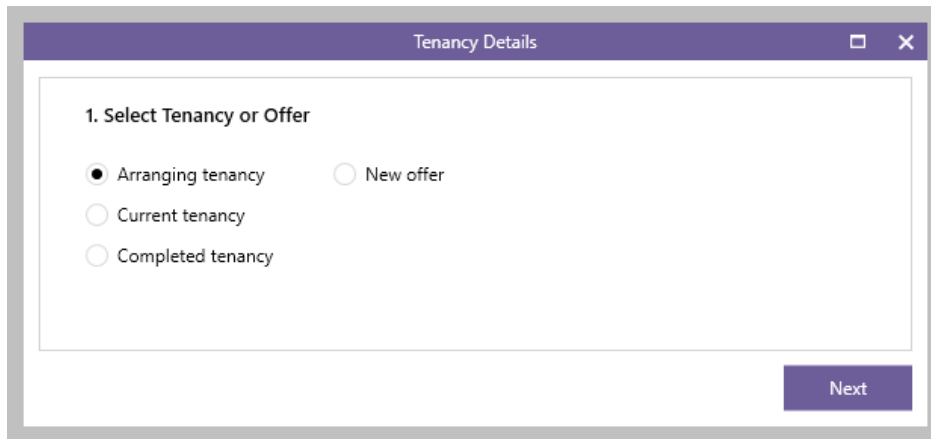
The screenshot shows the 'Diary' interface with the following elements:

- Buttons:** '+ Add Another', 'New Tenancy', 'Print', 'Save', 'Share'.
- Appointment Details:**
 - Entry Date: 29/09/2022
 - From: 12:00, To: 13:00
 - Recur every: 0, Until: / /
 - Entry Type: Viewing, Virtual:
 - Comments: Enter entry comments
 - Accompanied: Kian Kettlewell, Other Agent:
 - + Negotiators/Offices, Confirmed:
 - Cancelled: , Repeat: , All Confirmed:
 - Follow Up: 30/09/2022, Followed Up:
 - Notes: Enter follow up notes
- Property Information:**
 - Property: LON140018, Confirmed: , Followed Up:
 - Address: 11 Edith Terrace, London., SW10 0TQ
 - Image: Living room interior
 - Landlord: Miss R Biesty
 - Home: Not added
 - Mobile: 077234576
 - E-mail: rach@b13.com
- Applicant Information:**
 - Applicant: LON160001, Confirmed: , Followed Up:
 - Name: Mr S Cromwell
 - Mobile: 07700 900089
 - E-mail: cromwell@cromwell.com
 - Details: £4,345 to £8,690 per month, General, Area: Group South West London,

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:

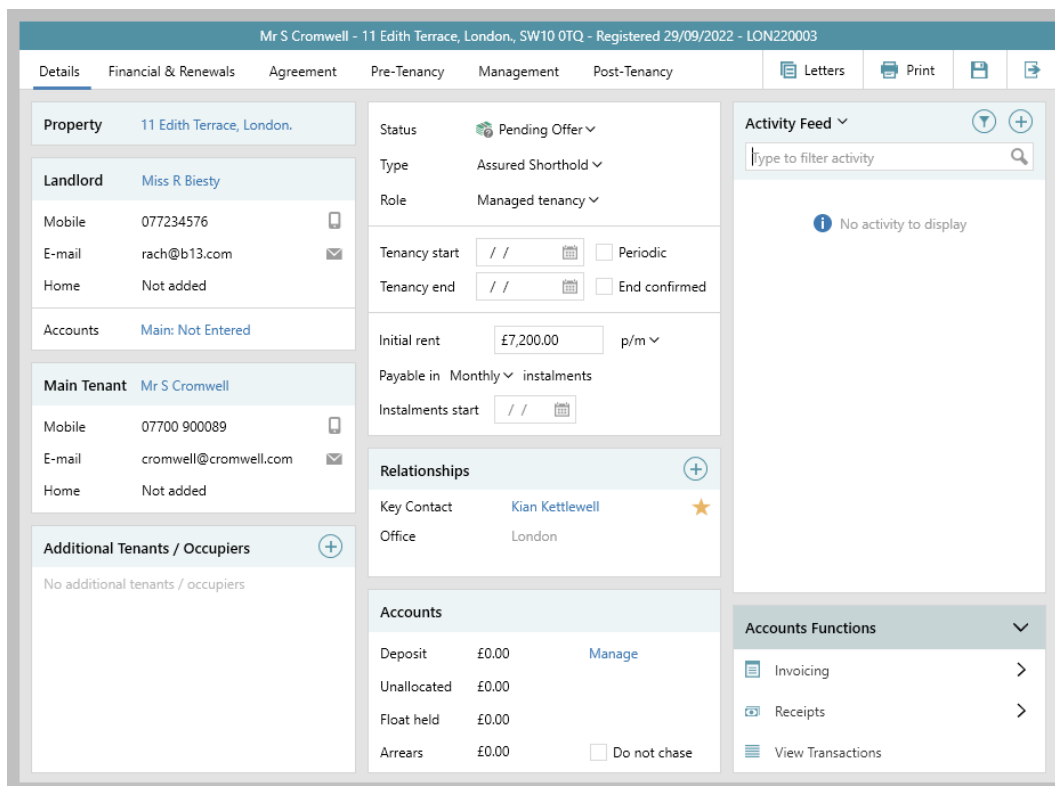


The new tenancy/offer is added for the applicant who viewed the property (as entered onto the viewing appointment screen)

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

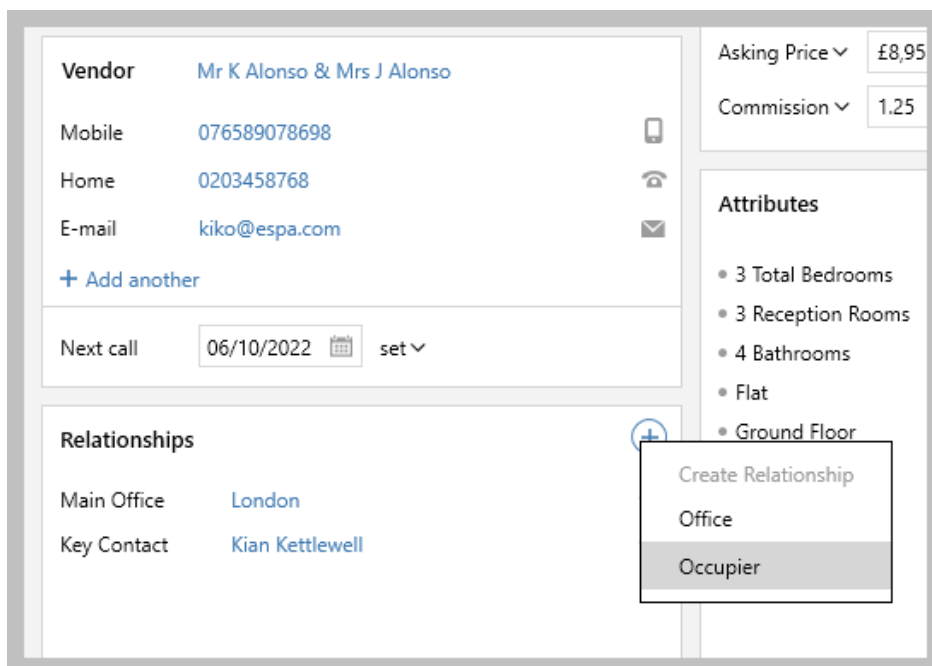
This guide has been reviewed against our global client base and classed as relevant to all regions

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

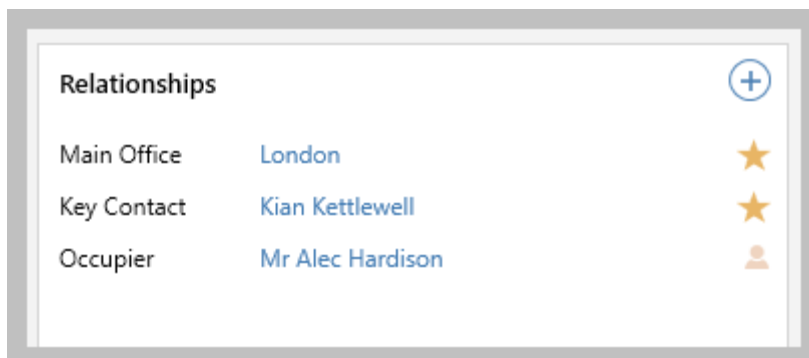
From a sales or lettings property:

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



The screenshot shows a property record interface. On the left, the 'Vendor' section lists 'Mr K Alonso & Mrs J Alonso' with contact details: Mobile 076589078698, Home 0203458768, and E-mail kiko@espa.com. Below this is a 'Next call' field set to 06/10/2022. The 'Relationships' panel shows 'Main Office: London' and 'Key Contact: Kian Kettlewell'. A dropdown menu is open over the Relationships panel, showing options: 'Create Relationship', 'Office', and 'Occupier' (which is highlighted). To the right, the 'Asking Price' is £8,95 and 'Commission' is 1.25. Below that, the 'Attributes' section lists: 3 Total Bedrooms, 3 Reception Rooms, 4 Bathrooms, Flat, and Ground Floor.

- 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**



The screenshot shows the 'Relationships' panel with a plus icon in the top right corner. The panel lists: 'Main Office: London' with a star icon, 'Key Contact: Kian Kettlewell' with a star icon, and 'Occupier: Mr Alec Hardison' with a person icon.

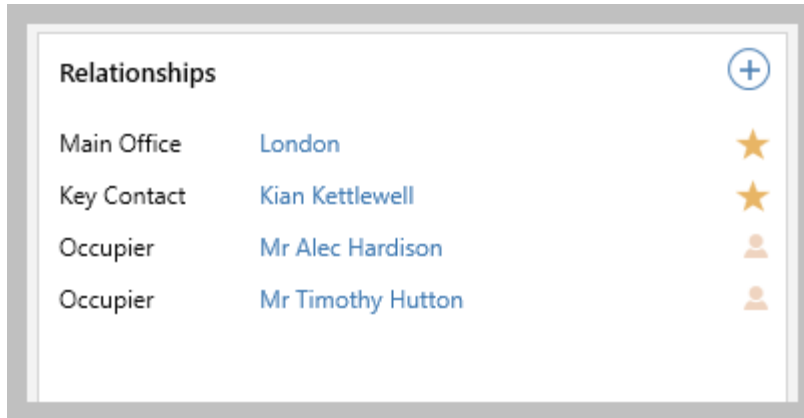
- Repeat the above steps to add all occupiers to the property

2. Display all occupiers & their contact details

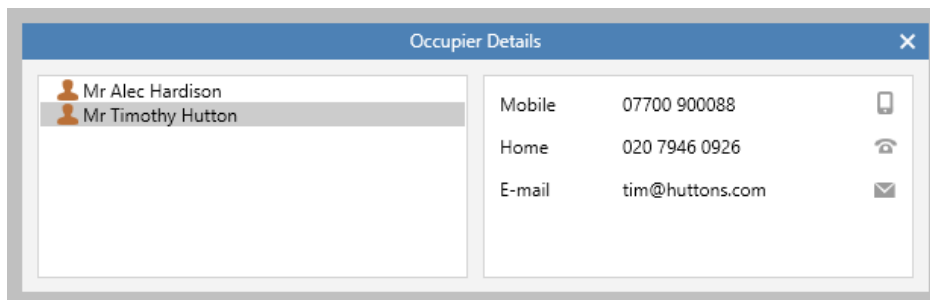
Details of all occupiers can be displayed in one window along with their contact details

From Relationships panel:

- Click contact icon to right of any occupier name



- Details of all occupiers are shown



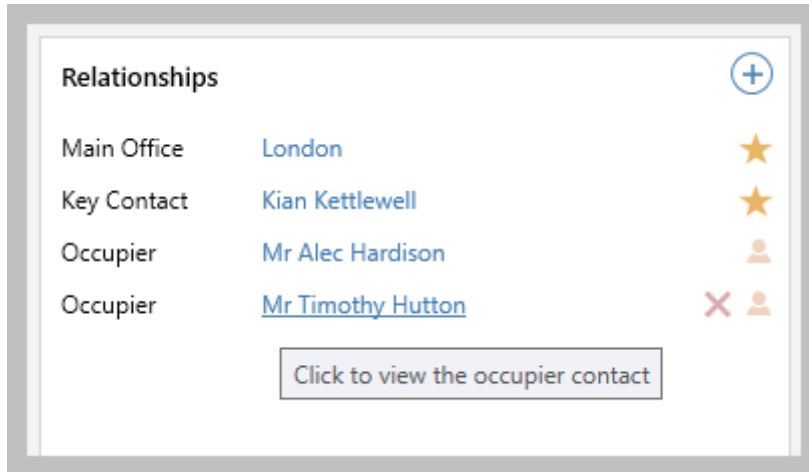
- Select occupier on left to display their details on right
- Icons on right offer options to send an email/text/call or copy the contact number/email address
The ability to call/text is dependent on configuration

3. Display occupier contact record

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

From Relationships panel:

- Click occupier name



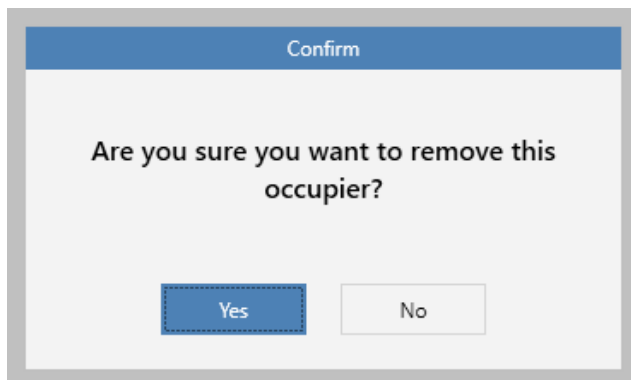
- The occupier's contact record is displayed

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

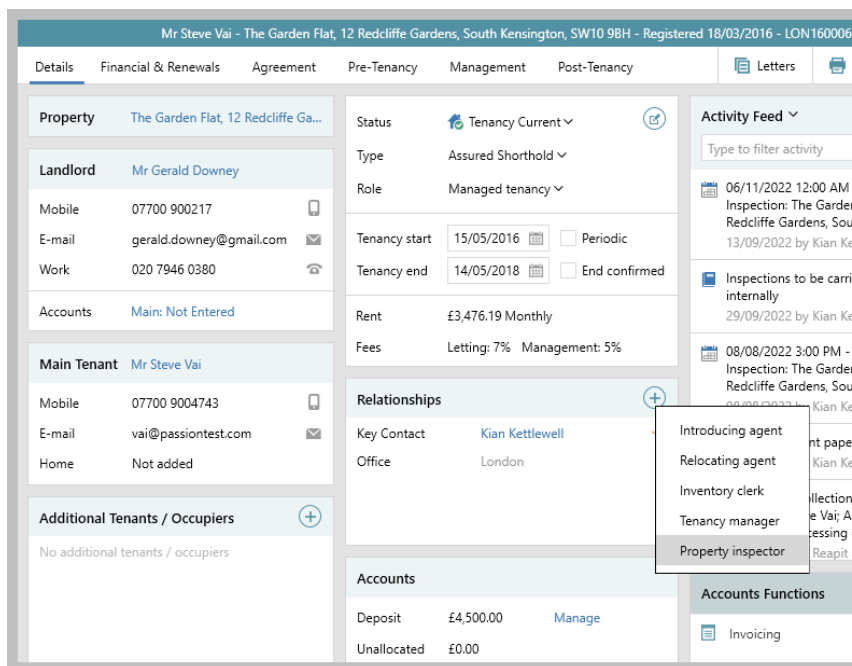
This guide has been reviewed against our global client base and classed as relevant to all regions

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

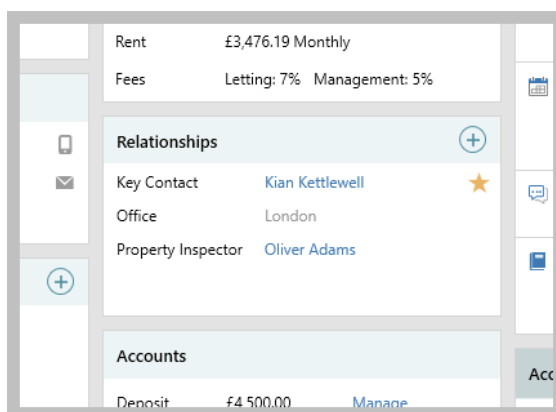
1. Add property inspector to tenancy

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

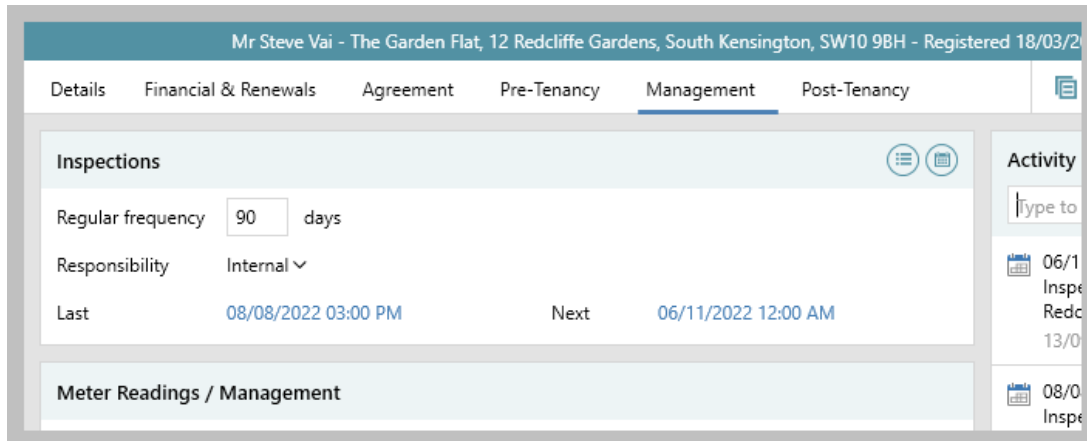


2. If property inspector option is not in the list

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**



The screenshot displays the 'Management' tab of a tenancy management system. The header shows the property details: 'Mr Steve Vai - The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH - Registered 18/03/2'. The 'Management' tab is selected, and the 'Inspections' panel is active. In this panel, the 'Regular frequency' is set to '90 days', and the 'Responsibility' is set to 'Internal'. The 'Last' inspection date is '08/08/2022 03:00 PM' and the 'Next' inspection date is '06/11/2022 12:00 AM'. Below the 'Inspections' panel is a section for 'Meter Readings / Management'. On the right side, there is an 'Activity' panel with a search bar and a list of activities, including '06/1 Inspe Redc 13/0' and '08/0 Inspe'.

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**

Company: Bobs Electrical Services, West London (LON1500069)

Company	Bobs Electrical Services	Staff	Supplier details	Contact details	Activity
Office	West London	Accreditations			
Business	Supplier <input checked="" type="checkbox"/> Core	Type Expiry Details			
Supplier	Supplier Type ...	Public Liability 23/06/2023			
Active	<input type="checkbox"/> Non-VAT registered	<input type="button" value="Add ..."/>			
Flat or House Name		Payments and Terms Transactions Payments			
No. Address1	89 Westbourne Park Rd London	Bank	Enter ...		
Postcode	W2 5QH United Kingdom	Nominal code	Select ...		
Telephone	e: bob@es.co.uk b: 020 7221 0021 Add ...	Commission paid to agent on supplier invoices	0.000 %		
Areas Covered		Referral Fee	£0.00		
Reference	LON1500069 Public	Terms description			
	<input type="checkbox"/> Opt out of marketing	<input type="button" value="Docs"/> <input type="button" value="Save"/> <input type="button" value="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

Company: Bobs Electrical Services, West London (LON15000069)

Company: Bobs Electrical Services
Office: West London
Business: Supplier Core
Supplier: Supplier Type ... On hold
Active: ID Check
 Non-VAT registered
Flat or House Name:
No. | Address1: 89 Westbourne Park Rd
London
Postcode: W2 5QH United Kingdom
Telephone: e: bob@es.co.uk
b: 020 7221 0021
Add ...
Areas Covered:
Reference: LON15000069 Public
 Opt out of marketing

Staff Supplier details **Contact details** Activity

Contact Notes Tasks ...
29/09/2022 Kian Kettlewell - Marked as a core supplier
Add ...

Negotiators / Offices
Add ...

Docs Save Exit

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**

The screenshot displays a 'Works Order (LON22000004)' interface. The main panel is divided into several sections: 'Works Order' (Status: Pending approval, Booked On: 29/09/2022, Work Type: Emergency Plumbing, Reported By: Landlord, Booked By: Kian Kettlewell, Priority: Medium), 'Works Details' (Work Title: Replace taps on cloakroom sink, Net Cost: £250.00, VAT: £50.00, Charge to: Landlord), and 'Instructions' (Landlord approval required over: £0.00, Float held: £0.00). A 'Contractor' panel is visible on the right, with a 'Select...' button. A 'Select' dialog box is open, showing a list of suppliers: 'Able Maintenance, London', 'Robinson Repairs', and 'Other ...'. The dialog box has 'Cancel' and 'Accept' buttons at the bottom.

- 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)

Search - 4 Companies listed

+ Add
Map View
Print
Exit

Name Quick Full

Telephone / E-mail

Address Quick Full

Code

Areas covered

Type

Supplier
x
v

Supplier type

Leave blank to select all supplier types
v

Include archive

Include inactive

Only core suppliers

Search

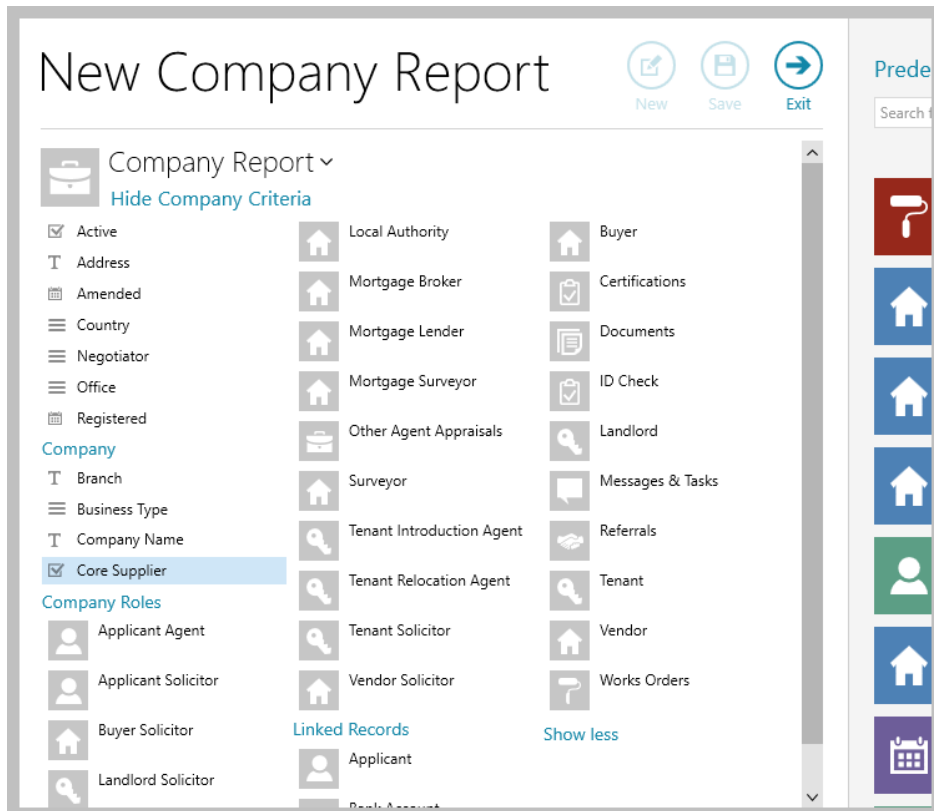
Name	Office	Address	Phone
▾ Able Maintenance	London	38 Warren Street, London, W1T 6AE	b: 02073804
▾ Bobs Electrical Services	West London	89 Westbourne Park Rd, London, W2 5QH	e: bob@es.cc
▾ Mario Brothers Plumbing	Fulham	373 Fulham Rd, London, SW10 9TW	b: 02073527
▾ Safe Gas	London		m: 07812 98

3. Power Reports

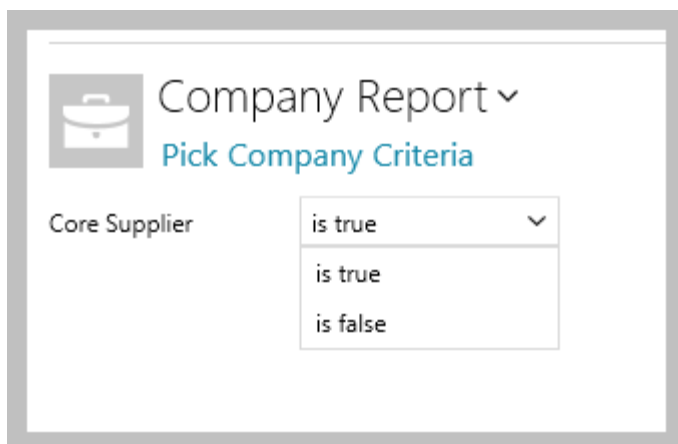
When carrying out company reports, it is possible to report on core suppliers and/or view information on whether the supplier is a core supplier in the report results grid

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 5GC	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**

Company: Able Maintenance, London (LON15000068)

Company	Able Maintenance	
Office	London	
Business	Supplier <input type="checkbox"/> Core	<input type="checkbox"/> On hold
Supplier	Handyman	<input checked="" type="checkbox"/> On hold
Active	<input type="checkbox"/> Non-VAT registered	<input type="checkbox"/> ID Check
Flat or House Name		
No. Address1	38 Warren Street London	
Postcode	W1T 6AE	United Kingdom
Telephone	b: 02073804440 e: Able@Maintenance.co.uk Add ...	
Areas Covered		
Reference	LON15000068	Public <input type="checkbox"/>
	<input type="checkbox"/> Opt out of marketing	

Staff | **Supplier details** | Contact details | Activity

Accreditations

Type	Expiry	Details
Public Liability	03/10/2019	Direct Line

Add ...

Payments and Terms

Transactions | Payments

Bank: Enter ...

Nominal code: Select ...

Commission paid to agent on supplier invoices: 0.000 %

Referral Fee: £0.00

Terms description: |

Docs | Save | 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

The screenshot shows a software interface for managing a company record. The title bar indicates the company is 'Able Maintenance, London (LON15000068)'. The interface is divided into two main sections: a left-hand form for company details and a right-hand panel for contact management.

Company Details Form:

- Company: Able Maintenance
- Office: London
- Business: Supplier (with a checkbox for Core)
- Supplier: Handyman (with a checked checkbox for On hold)
- Active: (dropdown menu) ID Check
- Non-VAT registered
- Flat or House Name: (empty)
- No. | Address1: 38 Warren Street, London
- Postcode: W1T 6AE, United Kingdom
- Telephone: b: 02073804440, e: Able@Maintenance.co.uk, Add ...
- Areas Covered: (empty)
- Reference: LON15000068, Public (empty)
- Opt out of marketing

Contact Management Panel:

- Tabs: Staff, Supplier details, **Contact details**, Activity
- Section: Contact Notes (Tasks ...)
- Entries:
 - 04/10/2022 Kian Kettlewell - Removed as a core supplier
 - 04/10/2022 Kian Kettlewell - Marked as an on hold supplier
 - 29/09/2022 Kian Kettlewell - Marked as a core supplier
- Section: Negotiators / Offices (Add ...)
- Buttons: Docs, Save, Exit

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

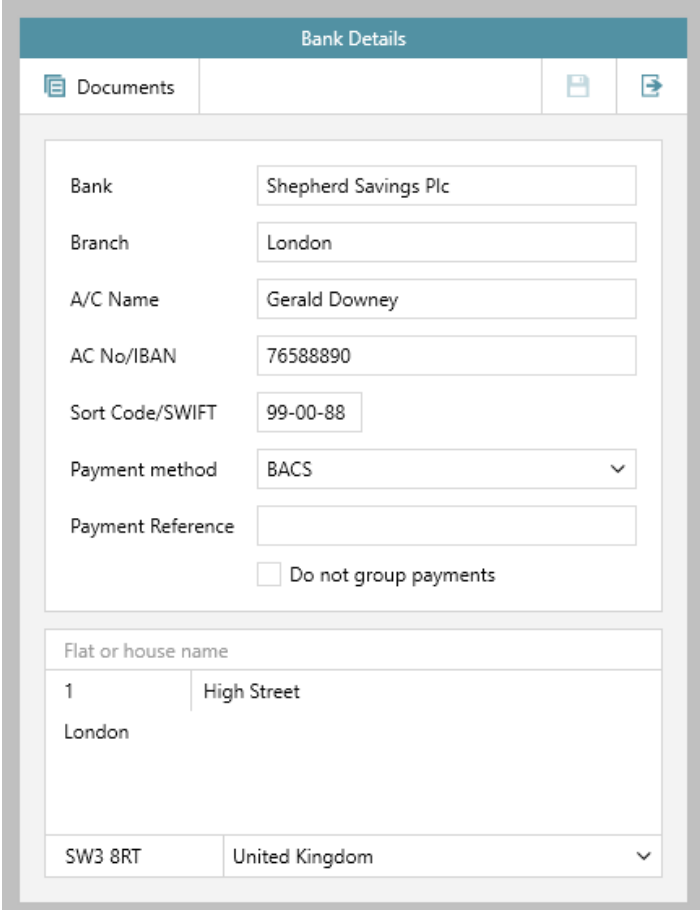
1. Access bank details

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



The screenshot shows the 'Bank Details' screen. At the top, there is a teal header with the text 'Bank Details'. Below the header, there is a navigation bar with a 'Documents' button on the left and 'Save' and 'Share' icons on the right. The main form area contains the following fields:

- Bank: Shepherd Savings Plc
- Branch: London
- A/C Name: Gerald Downey
- AC No/IBAN: 76588890
- Sort Code/SWIFT: 99-00-88
- Payment method: BACS (dropdown menu)
- Payment Reference: (empty field)
- Do not group payments

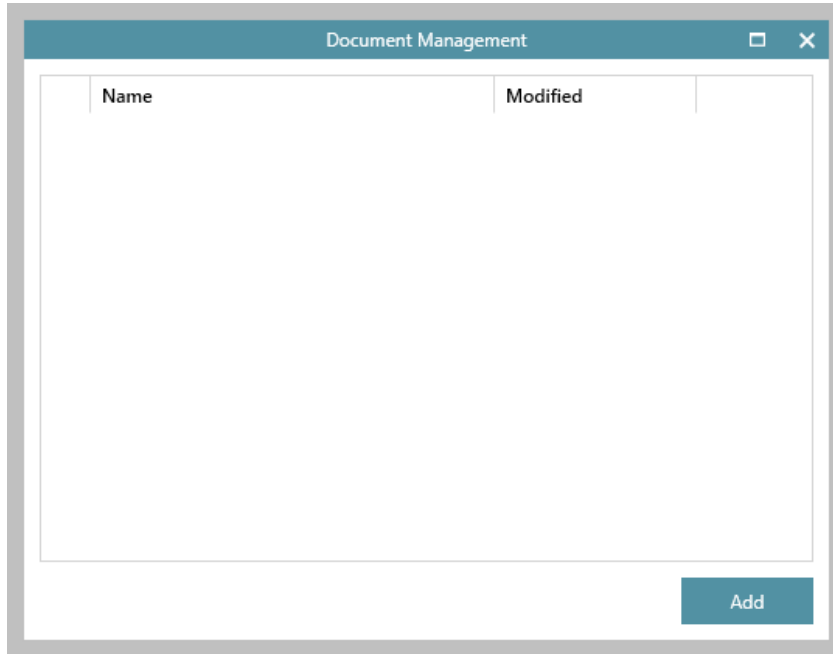
Below the bank details, there is a section for 'Flat or house name' with the following fields:

- 1 High Street
- London
- SW3 8RT
- United Kingdom (dropdown menu)

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

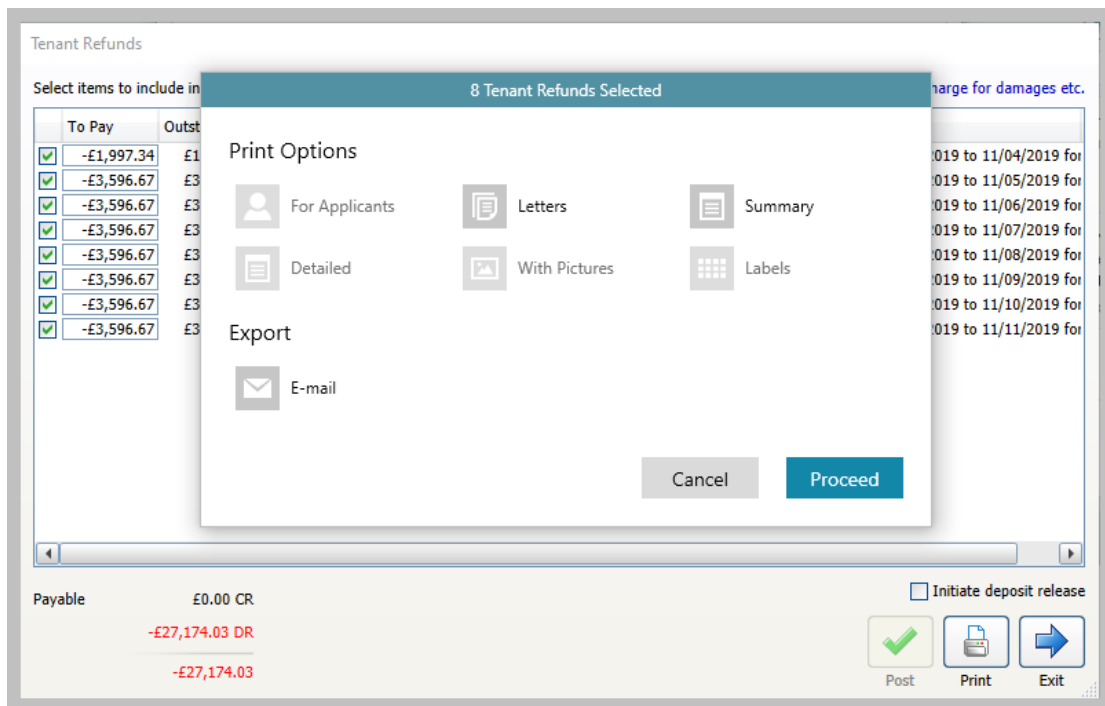
Letter & email options available in tenant refunds/repayments screen

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