

Reapit AgencyCloud 12.156

release notes

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

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

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Client Accounts

No client additions in this release

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

Configuration options are available to Enterprise customers only

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

General

New UI round-up: v12.156

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 12.156 to bring it in line with previously redesigned screens

All existing functionality exists but with a refreshed look and feel

Sales invoice reporting

The sales invoice reporting screen now uses the new UI format

From main menu:

- Click **Reports** and select **MI Analysis**
- Click **Invoice Reports**
- The **Sales Invoice Reporting** screen uses the new UI format

The screenshot displays the 'Sales Invoice Reporting' interface. At the top, there is a title bar 'Sales Invoice Reporting' and a toolbar with buttons for 'Select predefined reports', 'Run Report', 'Save', and 'Exit'. Below the toolbar, the 'Report Criteria' section includes radio buttons for 'Live Properties' (selected), 'Archive Properties', and 'Live And Archive Properties'. The 'Sort Order' section has a link 'Grouping and sort order ...'. The main criteria area contains several filter options: 'Dates' (with date pickers and a 'Date Range ...' link), 'Amount' (with input fields for £0.00 and an 'Exclude VAT' checkbox), 'Outstanding' (with input fields for £0.00), 'Type' (with a checked checkbox and a dropdown set to 'Invoice'), 'Reference' (with an empty input field), 'Status' (with a link 'Select one or more status ...'), 'Recipient' (with an empty input field), 'Recipient Address' (with an empty input field and radio buttons for 'Quick' and 'Full', with 'Full' selected), 'Property' (with an empty input field and radio buttons for 'Quick' and 'Full', with 'Full' selected), 'Property Office' (with a link 'Select one or more office ...'), and 'Extra' (with an empty input field and a link 'Select further report criteria ...').

- The **Predefined Reports** section has moved from the bottom to the top left of the screen
- The **Run, Save & Exit** buttons are now at the top of the screen

For more information on sales invoicing, including running reports, see section on Knowledge Base titled: *Invoicing (sales - UK)*

Letter Template Editor preview template option

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

From AgencyCloud 12.156+, when creating or updating a template via the Letter Template Editor (LTE), users can preview the template they are working on prior to having to save & upload it - this means that a new or edited template is now only uploaded to AgencyCloud when it has been tested/previewed and is ready for use

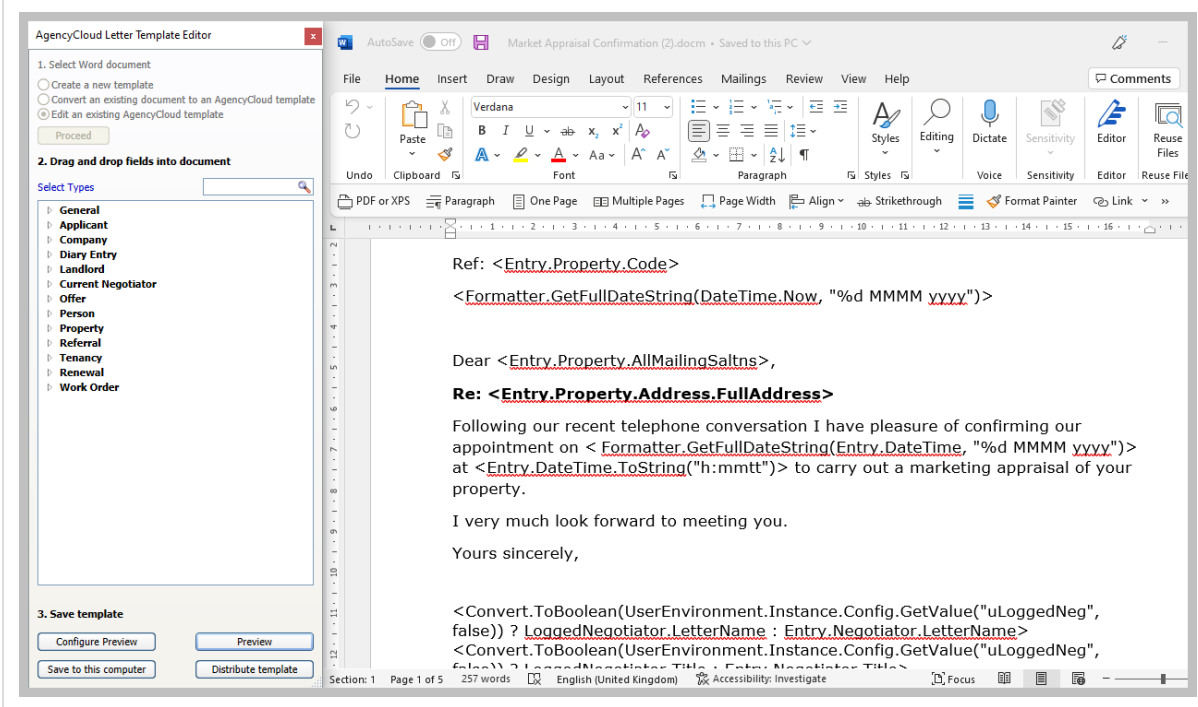
This change to the LTE allows work to continue on templates without having to leave the LTE - it also prevents letters being generated in order to test new/updated templates (resulting in journal entries being logged against records while testing takes place)

The LTE is an inbuilt tool to assist in managing new and existing letter templates for use in AgencyCloud, access to this application within a company is usually limited - for more information, see guide on Knowledge Base titled: *Using Letter Template Editor to create, edit and distribute letter templates*

1. Work on letter template

From LTE:

- Carry out required work on new/existing template
- When ready to preview your changes, move to step 2



2. Configure preview

To allow you to test the template, you can choose up to 3 role types to be merged into it via the **Configure Preview** function - for example, if you are testing a new market appraisal appointment letter, you would select a property record to test with

From the bottom left of the LTE toolbar:

- Click **Configure Preview**

Use the **Preview Template Configuration** screen to select up to 3 roles from **Applicant, Property, Landlord, Contact** and **Tenancy**:

- Click magnifying glass icon to right of field and use the search screen to find the required record to use for the preview

The screenshot displays the AgencyCloud Letter Template Editor interface. On the left, a sidebar contains a tree view of field types: General, Applicant, Company, Diary Entry, Landlord, Current Negotiator, Offer, Person, Property, Referral, Tenancy, Renewal, and Work Order. The main workspace shows a document template with a 'Re:' line containing a placeholder: **Re: <Entry.Property.Address.FullAddress>**. Below this, a preview of the letter text is visible, including the sentence: "Following our recent telephone conversation I have pleasure of appointment on <Formatter.GetFullDateString(Entry.DateTime, at <Entry.DateTime.ToString('h:mmtt')> to carry out a market". A 'Preview Template Configuration' dialog box is open in the center, titled "Preview Template Configuration". It contains the instruction "Select objects to be merged with preview of template. Up to three objects can be selected." and five input fields with search icons: Applicant, Property (containing "10 Moncorvo Close, Knightsbridge, London, SW7 1NQ"), Landlord, Contact, and Tenancy. The dialog has 'Cancel' and 'Save' buttons. The background shows the Microsoft Word ribbon with the 'View' tab selected.

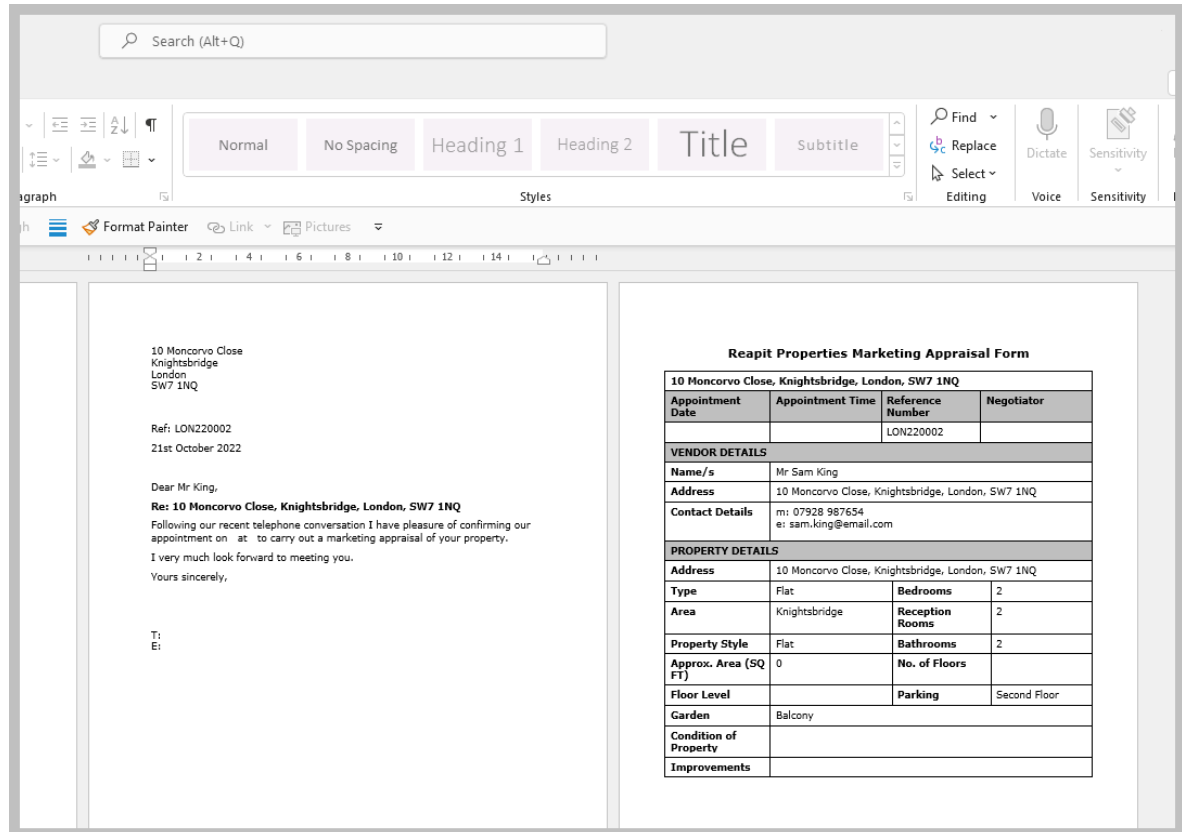
- Click **Save**

3. Preview template

When the Configure Preview option(s) have been selected, the template can be previewed

From the bottom left of the LTE toolbar:

- Click **Preview**
- A new screen will open in Word (in preview mode)



- When the content of the template has been checked, the preview screen can be closed
- This allows you to return to the LTE screen (seen in step 1) to carry out further work or to save/distribute the template

The records chosen in the Configure Preview screen are saved for this session of the LTE, allowing you to continue to work on the template and click Preview when changes need to be checked

Log changes to ID check detail in the contact Activity Feed/journal - 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 logs changes to ID check detail in the contact Activity Feed/journal

This is useful when multiple users across various teams have permissions to change ID check details and their status - as the Activity Feed will flag up what was changed, by who and when

To enable this configuration option, contact Reapit Support

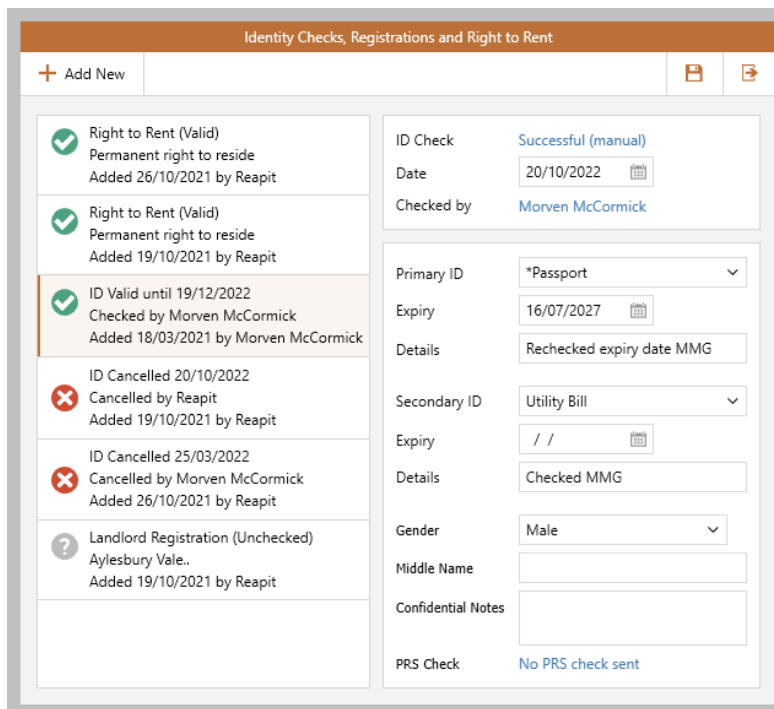
Providing the **ID Check** status is *not* set to **Unchecked**, then any changes to the *detail* of an ID check will be logged in the Activity Feed - for information on the detail it logs, see point 1 below

This configuration *does not* log changes to the **Status** of the ID check, another configuration option is available which does this, as outlined in Knowledge Base guide titled: *Changes to ID check status logged in contact Activity Feed/journal - configuration option*

1. Make changes to ID check

From contact record:

- Make required changes to the ID check



The screenshot displays the 'Identity Checks, Registrations and Right to Rent' interface. On the left, a list of ID checks is shown with status indicators: green checkmarks for 'Valid', red crosses for 'Cancelled', and a question mark for 'Unregistered'. The right pane shows the details for a selected 'Successful (manual)' ID check. Fields include: Date (20/10/2022), Checked by (Morven McCormick), Primary ID (*Passport), Expiry (16/07/2027), Details (Rechecked expiry date MMG), Secondary ID (Utility Bill), Gender (Male), Middle Name, Confidential Notes, and PRS Check (No PRS check sent).

- Providing the **ID Check** status is *not* set to **Unchecked**, then changes to the following details of an ID check will be logged in the Activity Feed/journal:
 - Primary/Secondary ID type
 - Expiry date
 - Details
 - Any other field available at the bottom right of the ID check screen (dependent on configuration)

2. Changes logged in Activity Feed

- All changes made are listed in the **Activity Feed** and can also be seen in the contact **Journal**
- Text under each entry indicates when the changes were made and who made them

The screenshot displays a user profile for 'Liam Green' (ID: BED21000005) with a registration date of 18/03/2021. The interface includes navigation options for 'Journal', 'Print', and 'Letters'. On the left, the profile is marked as 'Active' and includes contact details: 'Main: High Street Bank - A/C: 987654321', a date of birth '30/09/1990', and a date 'A - 02/08/2021'. The 'Activity Feed' on the right shows a recent update: 'Change to successful ID check for Mr Liam Green. Primary ID details changed from Checked MMG to Rechecked expiry date MMG. Primary ID expiry date changed from 24/04/2026 to 16/07/2027. 1 minute ago by Reapit'. A 'Show less' link is provided for this entry.

Sales & lettings/rentals

Book & identify second/repeat viewings

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

A viewing appointment can be duplicated to allow a second/repeat viewing to be booked and to be easily identified

As well as saving time in creating repeat viewing appointments, repeat viewings are flagged as repeat entries in the diary, in applicant/property journals and also via Power Reports, making it easier to establish where/when repeat viewings are taking place

1. Create duplicate viewing appointment

The option to create a duplicate appointment is only available for viewing appointments

From viewing appointment:

- Click **Duplicate** (top left)
The option to **Duplicate** is available on viewing appointments once the appointment has been saved & the screen is re-opened

The screenshot displays a software interface for managing a viewing appointment. At the top, a purple header bar contains the word "Diary". Below this, there are three main sections: a top navigation bar with buttons for "Add Another", "Duplicate", and "New Offer"; a central form area for appointment details; and a right-hand sidebar with property and applicant information.

Appointment Details:

- Buttons: + Add Another, + Duplicate, New Offer, Print, Save, Share
- Entry Date: 20/10/2022 (with calendar icon)
- From: 17:00, To: 17:30
- Recur every: 0 (with dropdown arrow), Until: // (with calendar icon)
- Entry Type: Viewing (with dropdown arrow), Virtual (checkbox)
- Text area: Enter entry comments
- Accompanied: Kian Kettlewell, Other Agent (checkbox)
- + Negotiators/Offices (checkbox)
- Confirmed (checkbox)
- Cancelled (checkbox), Repeat (checkbox), All Confirmed (checkbox)
- Follow Up: // (with calendar icon), Followed Up (checkbox)
- Text area: Really likes - wants 2nd viewing on Saturday with rest of family

Property Information:

- Property: LON140002 (with search icon)
- Status: Confirmed (checkbox), Followed Up (checkbox)
- 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 up arrow icon)
- Mobile: 07890 567898 (with mobile phone icon)
- Home: 020 987 8968 (with home phone icon)
- E-mail: Chris@cfc.co.uk (with email icon)

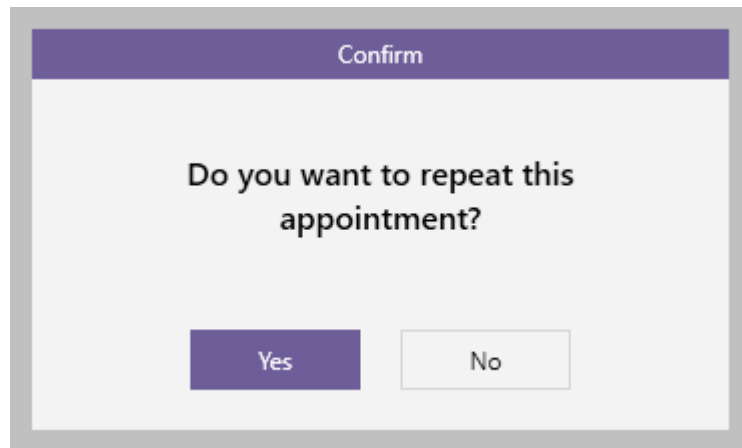
Applicant Information:

- Applicant: LON140002 (with search icon)
- Status: Confirmed (checkbox), Followed Up (checkbox)
- Name: Mr T Jones, Mrs E Jones (with edit icon)
- Mobile: 07659087123 (with mobile phone icon)
- E-mail: tom@bvtv.com (with email icon)
- Price range: £4,000,000 to £6,000,000
- Notes: Hot, Nothing to sell, Cash Buyer, To Live In
- Area: Group South West London

2. Confirm repeat appointment

A prompt will be displayed

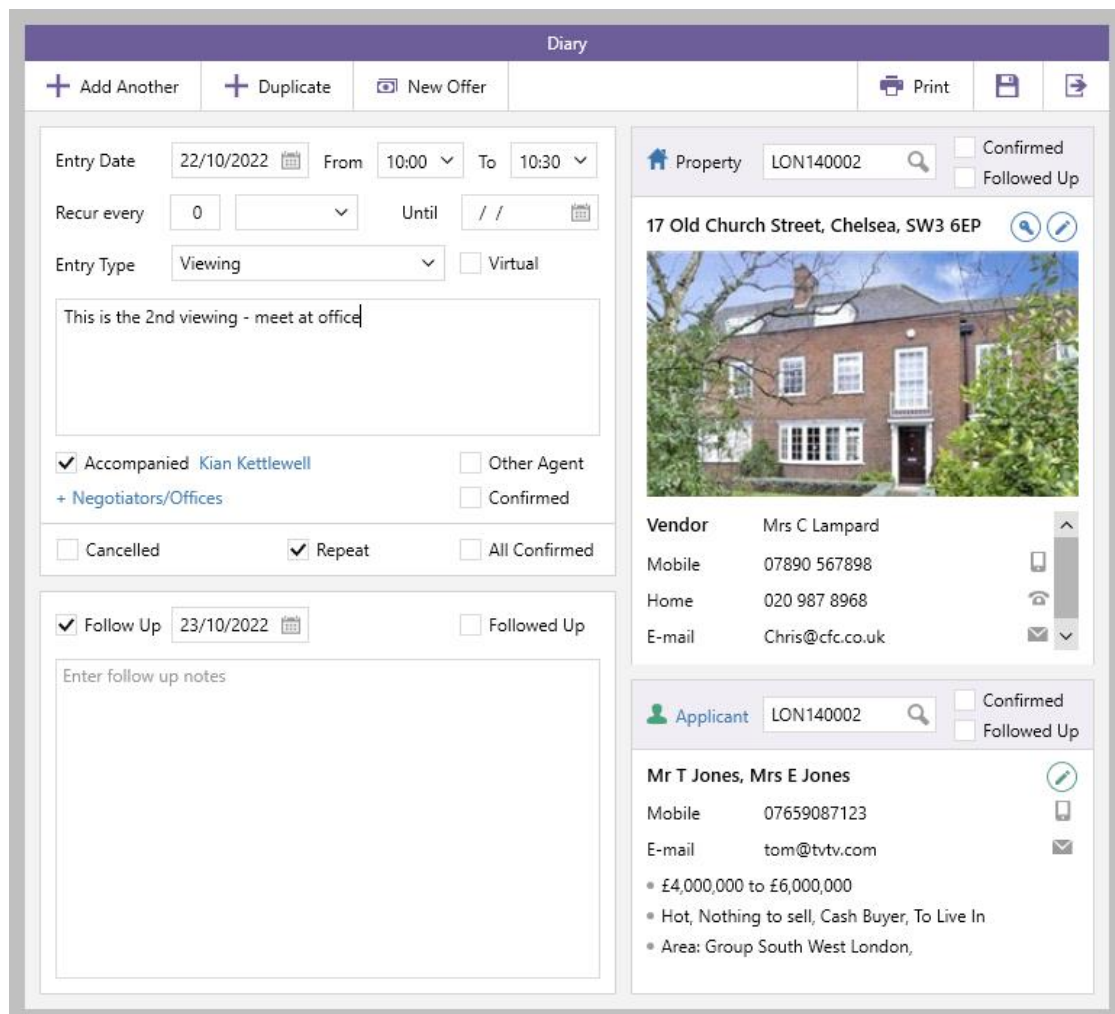
- Click **Yes**



3. Duplicate appointment created

From duplicate viewing appointment:

- Update date & time for the repeat viewing
- Complete all other areas for the viewing as normal, such as general notes, **Confirmed** boxes & **Follow Up** date
- **Repeat** box is automatically ticked to identify the repeat appointment
- **Save** and exit

A screenshot of a software interface titled "Diary". The interface is divided into several sections. At the top, there is a purple header bar with the word "Diary" in white. Below the header, there are several buttons: "+ Add Another", "+ Duplicate", "New Offer", "Print", "Save", and "Refresh". The main content area is split into two columns. The left column contains appointment details: "Entry Date" (22/10/2022), "From" (10:00) and "To" (10:30), "Recur every" (0), "Until" (//), "Entry Type" (Viewing), and a text box containing "This is the 2nd viewing - meet at office". There are also checkboxes for "Accompanied" (checked), "Other Agent", "+ Negotiators/Offices", "Cancelled", "Repeat" (checked), and "All Confirmed". The right column contains property details: "Property" (LON140002), "17 Old Church Street, Chelsea, SW3 6EP", a photo of a brick house, "Vendor" (Mrs C Lampard), "Mobile" (07890 567898), "Home" (020 987 8968), and "E-mail" (Chris@cfc.co.uk). Below this, there is an "Applicant" section for "Mr T Jones, Mrs E Jones" with "Mobile" (07659087123), "E-mail" (tom@tvvtv.com), and a list of notes: "£4,000,000 to £6,000,000", "Hot, Nothing to sell, Cash Buyer, To Live In", and "Area: Group South West London".

2. Repeat viewings in diary & journal

- The repeat viewing is flagged in the diary & the applicant/property journals

The screenshot shows a mobile diary interface for Kian Kettlewell in London. The top navigation bar includes a search icon, a notification bell with '1', and an email icon with '9+'. The main header displays 'AgencyCloud - Agency' and 'Saturday 22nd October'. A left sidebar contains navigation options: 'Organiser', 'Diary', 'Applicant', and 'Property'. The diary grid shows time slots from 08:00 to 11:00. A purple highlight is placed on the 10:00 slot, containing the text: 'Viewing*: 17 Old Church Street, Chelsea, SW3 6EP with Mr T Jones; 2nd viewing (Repeat)'.

The screenshot shows the 'Journal and Diary Entries' interface. At the top, there is a filter bar with the text 'Filter Type to filter entries' and a search icon. Below this is a list of viewings under the heading 'Viewings (5)'. The entries are:

- 22/10/2022 10:00 AM - Viewing: Mr T Jones, This is the 2nd viewing - meet at office (Repeat)
- 20/10/2022 5:00 PM - Viewing: Mr T Jones - Follow up: Really likes - wants 2nd viewing on Saturday with rest of family
- 16/09/2022 3:00 PM - Viewing: Miss Daisy Jones - Follow up: Really liked but felt that she would need to change kitchen and bathrooms for it to be right for her - going to keep in touch in case of price reduction
- 07/09/2022 10:30 AM - Viewing: Mr L Abbott - Follow up: Garden not right for them and too much work
- 22/03/2014 11:00 AM - Viewing: Miss A Terry - Follow up: too expensive

Below the list are sections for 'Offers (1)', 'Detail Change (1)', and 'Matches (6, Unique: 3)'. On the right side, a detailed view of a 'Viewing - Unconfirmed (Repeat)' is shown, including the time '10:00-10:30 on 22/10/22 - By Kian Kettlewell' and the note 'This is the 2nd viewing - meet at office'. There is an 'Add follow up' button and a note 'Created 21/10/2022 by Kian Kettlewell'. At the bottom, the 'Applicant' is listed as 'Mr T Jones'.

3. Repeat viewings in Power Reports

Repeat criteria and a repeat grid column has been added to the diary reporting function in Power Reports

When running a diary report, a **Repeat** criteria option is available, allowing you to run a viewings report filtered by whether the appointments is a repeat

For example, the report shown below will return repeat viewings for the London office booked this week

The screenshot displays the 'New Diary Report' interface. At the top, there are three icons: 'New' (pencil), 'Save' (floppy disk), and 'Exit' (arrow). Below the title, there are three buttons: 'New', 'Save', and 'Exit'. The main area is divided into several sections:

- Diary Report** (with a calendar icon) and **Hide Diary Criteria** (with a minus icon).
- A list of criteria with checkboxes and dropdown menus:
 - Amended:
 - Cancelled:
 - Confirmation date:
 - Confirmed:
 - Created:
 - Follow up date:
 - Made by:
 - Negotiator:
 - Office: (dropdown: Office)
 - Repeat: (dropdown: Repeat)
 - Time:
 - Type: (dropdown: Type)
 - Unaccompanied:
- Linked Records** section with a plus icon and 'Applicant' (with a person icon).
- Other filters: Contact (person icon), Landlord (key icon), Property (house icon), Tenancy (key icon).
- Office** filter: 'is current office' dropdown, 'London' text, and a close button (X).
- Type** filter: 'any of' dropdown, 'Viewing' dropdown, and a close button (X).
- Created** filter: 'in preset range' dropdown, 'This Week' dropdown, '(17/10/2022 to 23/10/2022)' text, and a close button (X).
- Confirmed** filter: 'is true' dropdown and a close button (X).
- Repeat** filter: 'is true' dropdown and a close button (X).
- A **Run Report** button at the bottom right.
- A **Predefine** sidebar on the right with a search box and several predefined report buttons (e.g., 'Act Con Aut', 'WC Wor Aut', 'Exp Prop Aut', 'MA Prop Aut', 'App App Aut', 'MA Prop Aut', 'Tod Dian Aut').

When running a diary report, a **Repeat** column is always available on the grid results screen which is useful when reporting on viewings

From the report results grid:

- Click and drag to move column to desired position
Then right-click over column headings and select **Save grid layout**
- Click **Repeat** column heading to sort by repeat appointment
- Click to the right of the **Repeat** column heading to group or filter the viewings

New Diary Report 39 Diary Entries

Time	Negotiator	Type	Repeat ▼	Property address	Contact
22/03/2014 11:00 AM	Kian Kettlewell	Viewing	No	Property address	Miss A Ter
29/10/2015 11:00 AM	Kian Kettlewell	Viewing	No	London.	Mr Bob Sr
26/10/2015 10:00 AM	Kian Kettlewell	Viewing	Yes	Chelsea, London	Miss A Ter
02/11/2015 02:30 PM	Kian Kettlewell	Viewing	Yes	s, London	Mr Bob Sr
02/11/2015 02:30 PM	Kian Kettlewell	Viewing	No		Mr Bob Sr
27/10/2015 06:00 PM	Kian Kettlewell	Viewing	No	78 Trevor Street, Knightsbridge	Miss H Dis
31/10/2015 06:00 PM	Kian Kettlewell	Viewing	No	78 Trevor Street, Knightsbridge	Ms Madel
04/11/2015 02:00 PM	Kian Kettlewell	Viewing	No	78 Trevor Street, Knightsbridge	Mr and M

Mortgage expiry date on sales applicant

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

A sales applicant's fixed rate mortgage expiry date can be stored on their applicant record and then reported on - this provides opportunities for mortgage service referrals based on when the renewal is required

1. Add mortgage expiry date

From sales applicant:

- Click link beside **Status** to view Applicant Status screen
- Enter date in **Mortgage Expiry Date** field
- Click cross to exit Applicant Status screen
- Save applicant record

The screenshot shows a window titled "Applicant Status" with a close button (X) in the top right corner. The form is organized into three main sections:

- Top Section:**
 - Applicant Status: General (dropdown menu)
 - Employee:
 - Last Call Date: 24/10/2022 (calendar icon)
 - Next Call Date: 31/10/2022 (calendar icon)
 - Mortgage Expiry Date: 22/05/2025 (calendar icon)
- Middle Section:**
 - Selling Position: Selling with other agent (dropdown menu)
 - Potential Client:
 - Selling Status: Sold STC - Unavailable (dropdown menu)
 - Agent: John D Wood & Co. Sales, Weybridge
- Bottom Section:**
 - Buying Position: Pending Own Sale (dropdown menu)
 - Buying Reason: To Live In (dropdown menu)

2. Reporting

From Reports on main menu:

- Click **Power Reports**
- Select **Applicant Report** for **Sales** then click **Show more**
- A **Mortgage Expiry** option is available

The screenshot shows the 'New Applicant Report' interface. At the top, there are 'New', 'Save', and 'Exit' buttons. Below the title, there is a search bar and a 'Predefined' section with various report options. The main content area is divided into three columns: 'Requirements', 'Linked Records', and 'Sales'. The 'Requirements' column has a list of criteria, with 'Mortgage Expiry' highlighted in a yellow box. The 'Linked Records' column lists various data sources like Agent, Appointments, Contact, etc. The 'Sales' column lists criteria like Buying Position, Buying Reason, etc.

3. Example report

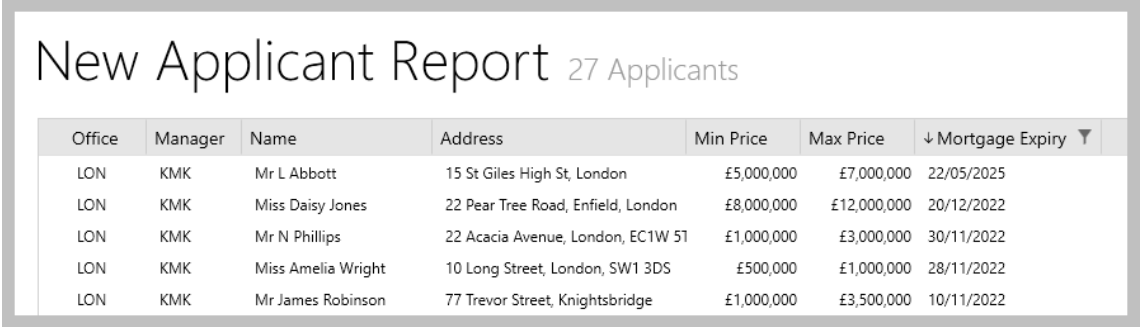
For example, this report will return active sales applicants from the logged in user's office with a mortgage due to expire in the next 3 months

The screenshot shows the 'New Applicant Report' interface with filters applied. The 'Mortgage Expiry' filter is set to 'in preset range' with 'Next 3 Months' selected. The 'Active' filter is set to 'is true' and the 'Office' filter is set to 'is current office' with 'London' selected. The 'Predefined' section on the right shows various report options.

4. View mortgage expiry information in results grid

The mortgage expiry date can be shown in the report results grid but needs to be added and saved to the grid first, as follows:

- Right-click over the column headings, click **Pick columns**, select **More**, tick **Mortgage Expiry**, then click **Accept**
- The new column will be added to the far right side of the grid - click and drag the column heading to the desired position
- Right-click over the column headings again and click **Save grid layout**



New Applicant Report 27 Applicants

Office	Manager	Name	Address	Min Price	Max Price	↓ Mortgage Expiry ▼
LON	KMK	Mr L Abbott	15 St Giles High St, London	£5,000,000	£7,000,000	22/05/2025
LON	KMK	Miss Daisy Jones	22 Pear Tree Road, Enfield, London	£8,000,000	£12,000,000	20/12/2022
LON	KMK	Mr N Phillips	22 Acacia Avenue, London, EC1W 5T	£1,000,000	£3,000,000	30/11/2022
LON	KMK	Miss Amelia Wright	10 Long Street, London, SW1 3DS	£500,000	£1,000,000	28/11/2022
LON	KMK	Mr James Robinson	77 Trevor Street, Knightsbridge	£1,000,000	£3,500,000	10/11/2022

- Grid functions can be used to sort or filter the report results by mortgage expiry
 - To sort the list, click the column heading
 - To filter, click to the right of the column heading (to view filter icon - shown above) and enter dates to filter by

Re-let checklist - 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 provides a re-let checklist on a lettings property when a tenancy ends and the property status is changed to available

On making a property available again, a specific re-let checklist is created - this checklist uses specific checks within the pre-instruction checklist and/or new re-let checks, as required and configured

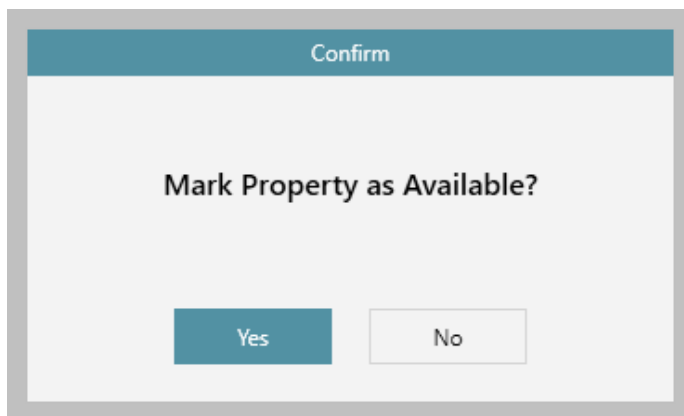
This functionality helps to ensure that a property being re-let is compliant and ready to be marketed each time it is made available after initial instruction

To enable this configuration option, contact Reapit Support

1. Make property available

From tenancy:

- Beside tenancy Status, click **Tenancy Current** and select **Tenancy finished/cancelled** and click **Yes** to confirm, when prompted
- Click to **Yes** to mark property as available
This must be done in order to initiate creation of the re-let checklist



Or, if there's a current tenancy and the property is to be made available again, ready to re-let

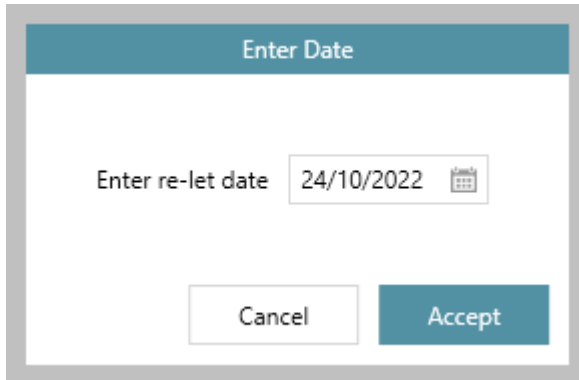
From property:

- Click **Status** and change to **Tenancy Current - Available**

2. Create re-let checklist

To use the re-let checklist functionality, you must enter a re-let date & click **Accept** on the prompt below (clicking **Cancel** will prevent the re-let checklist from being created)

- Enter re-let date and click **Accept**

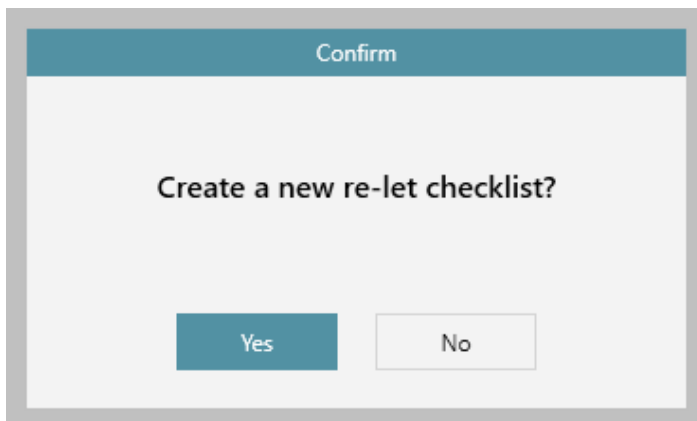


Enter Date

Enter re-let date 24/10/2022

Cancel Accept

- Click **Yes** to create new re-let checklist - after clicking **Yes**, the old pre-instruction checklist for the property will be frozen and the new checklist used
If you do not wish to create the new re-let checklist at this stage, click **No** and skip to step **2a**

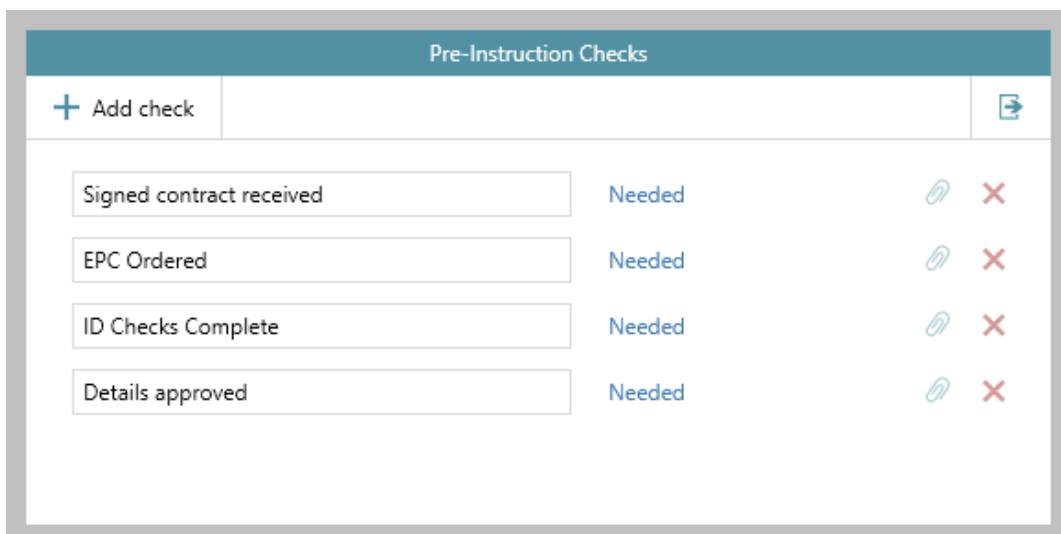


Confirm

Create a new re-let checklist?

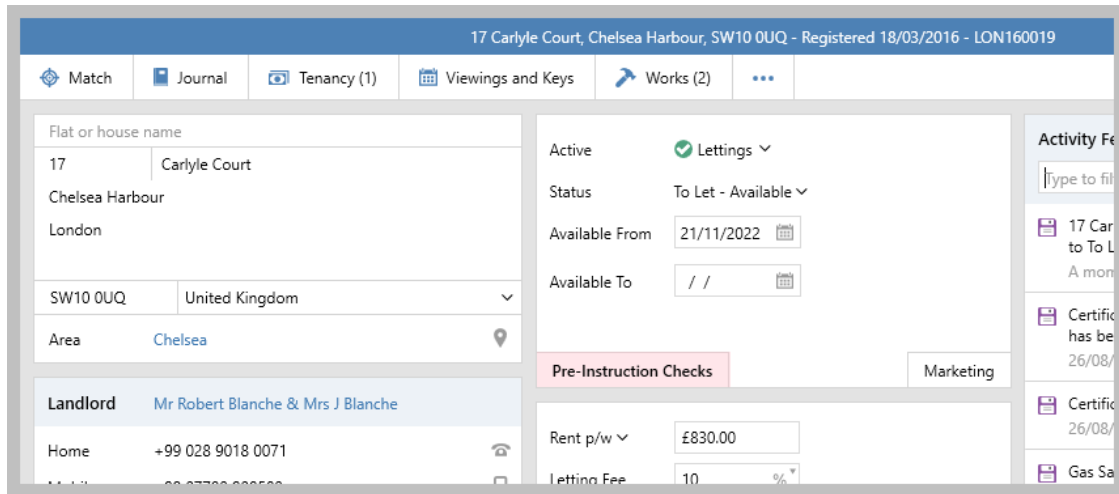
Yes No

- The new re-let checklist is displayed



Pre-Instruction Checks			
+ Add check			↻
Signed contract received	Needed	📎	✗
EPC Ordered	Needed	📎	✗
ID Checks Complete	Needed	📎	✗
Details approved	Needed	📎	✗

- The re-let checklist is accessed on the property record via the **Pre-Instruction Checks** button
This button is shaded red to indicate it is incomplete

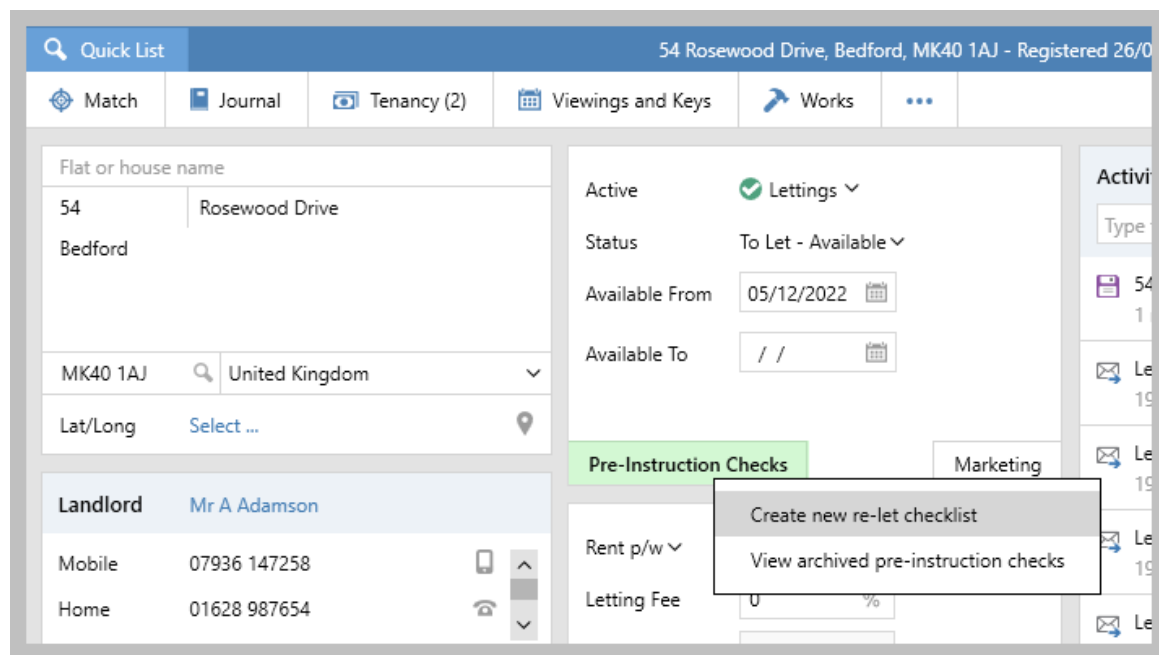


2a. Create new checklist later

If you chose not to create a re-let checklist when prompted (see previous step), this can be done when required

From property:

- Hover over **Pre-Instruction Checks** button and right-click
- Select **Create new re-let checklist** - *when choosing this option, the old pre-instruction checklist for the property will be frozen and the new checklist used*
- The new re-let checklist is displayed

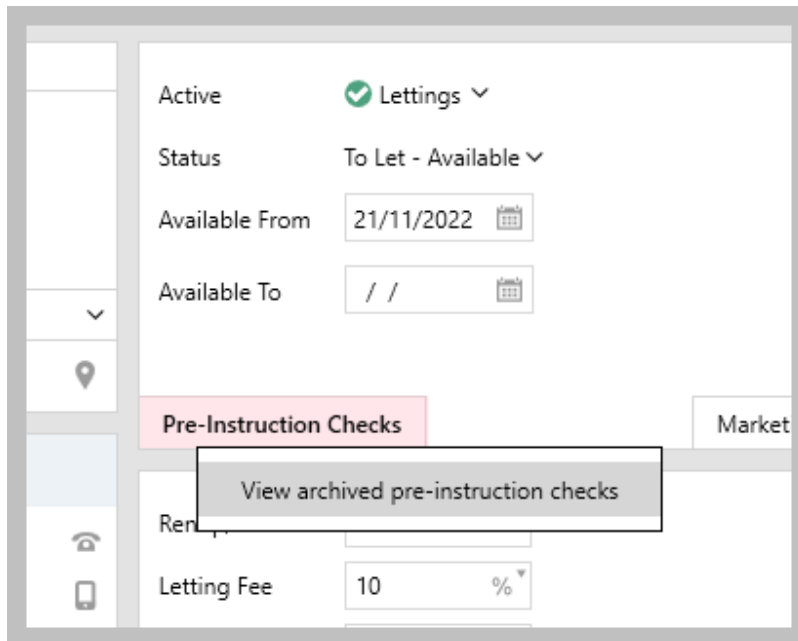


3. View previous checklists

An option to view previous checklists is available

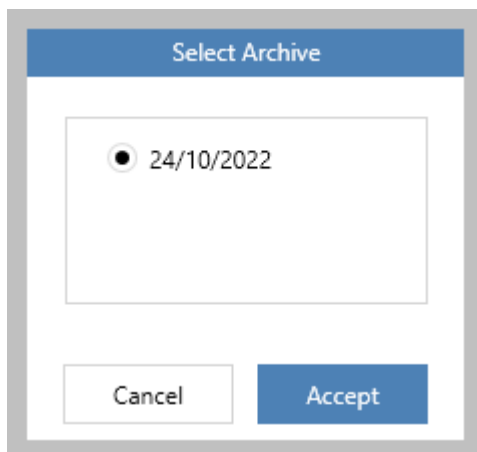
From property:

- Hover over **Pre-Instruction Checks** button and right-click
- Select **View archived pre-instruction checks**



Dates of previous checklists will be displayed in a list

- Select required checklist and click **Accept**



Previous checklists are read-only & cannot be changed

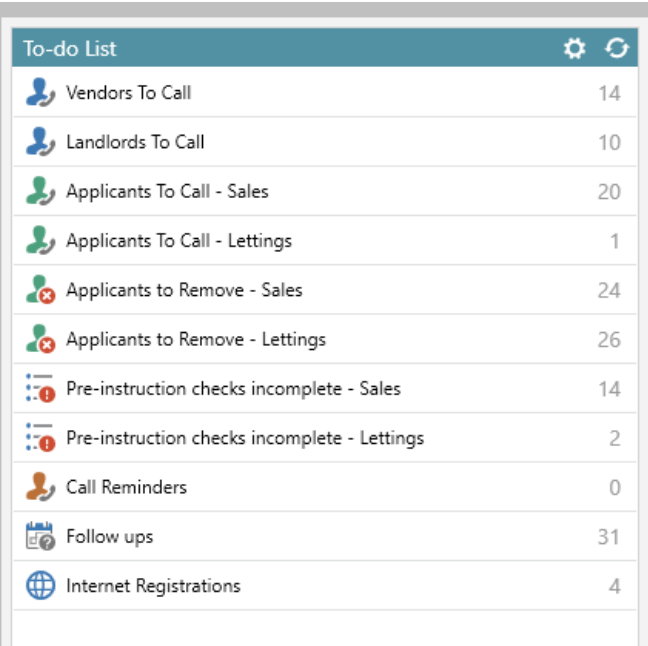
4. Add incomplete re-let checks on Organiser

Incomplete re-let checks can be flagged on the Organiser, this needs to be added to the panel and saved first

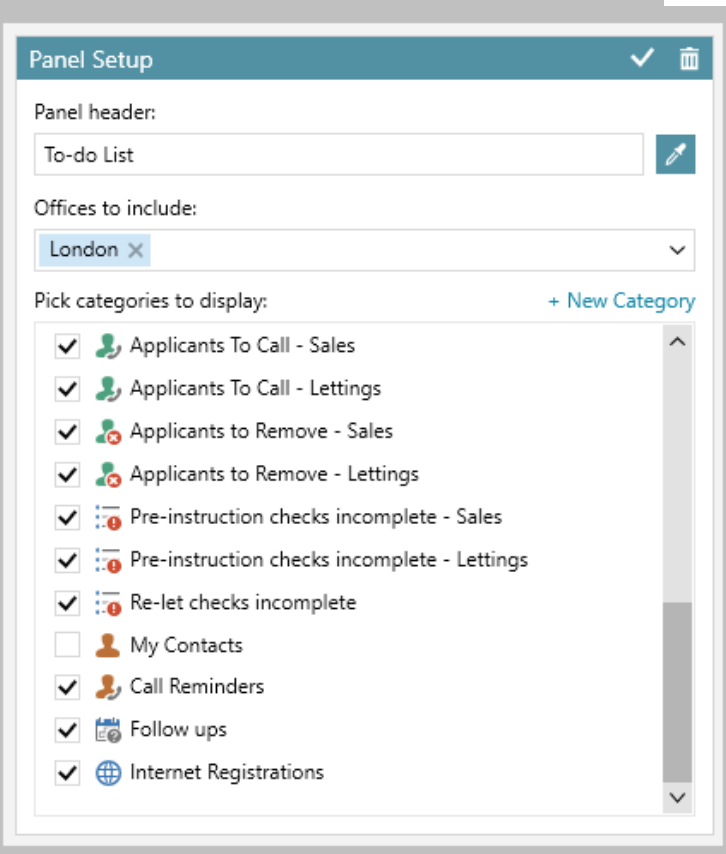
From Organiser:

- In the **Overview** or **To-do List** panel (for example), hover over panel header and click **cog** icon
- Tick **Re-let checks incomplete**
- Click tick (top right) to save Panel Setup

See next step



Item	Count
Vendors To Call	14
Landlords To Call	10
Applicants To Call - Sales	20
Applicants To Call - Lettings	1
Applicants to Remove - Sales	24
Applicants to Remove - Lettings	26
Pre-instruction checks incomplete - Sales	14
Pre-instruction checks incomplete - Lettings	2
Call Reminders	0
Follow ups	31
Internet Registrations	4



Panel Setup

Panel header: To-do List

Offices to include: London

Pick categories to display: + New Category













- Applicants To Call - Sales
- Applicants To Call - Lettings
- Applicants to Remove - Sales
- Applicants to Remove - Lettings
- Pre-instruction checks incomplete - Sales
- Pre-instruction checks incomplete - Lettings
- Re-let checks incomplete
- My Contacts
- Call Reminders
- Follow ups
- Internet Registrations

5. Incomplete re-let checks flagged on the Organiser

From Organiser:

- Click **Re-let checks incomplete**

A list of properties is displayed including information on how many checks are incomplete for each one

To-do List	
 Vendors To Call	14
 Landlords To Call	10
 Applicants To Call - Sales	20
 Applicants To Call - Lettings	1
 Applicants to Remove - Sales	24
 Applicants to Remove - Lettings	26
 Pre-instruction checks incomplete - Sales	14
 Pre-instruction checks incomplete - Lettings	2
 Re-let checks incomplete	2
 Call Reminders	0
 Follow ups	31
 Internet Registrations	4

- Click the entry to view the property

← Re-let checks incomplete (2)	
Flat 8, 17 Hasker Street, Chelsea, SW3 2LE	Registered: 18/03/2016 14:16:40
✕ 1 incomplete check	
17 Carlyle Court, Chelsea Harbour, SW10 0UQ	Registered: 18/03/2016 14:25:08
✕ 4 incomplete checks	

6. Reporting

From Reports on main menu:

- Click **Power Reports**
- Select **Property Report for Lettings**
- A **Re-let date** option is available

The screenshot shows the 'New Property Report' interface. At the top, there are 'New', 'Save', and 'Exit' buttons. Below the title, there are navigation options for 'Property Report' and 'Lettings'. A 'Hide Property Criteria' link is visible. The main area is divided into three columns: 'Attributes', 'Lettings', and 'Linked Records'. The 'Lettings' column has a 'Re-let date' option highlighted with a yellow circle. The 'Linked Records' column lists various property-related items. On the right side, there is a 'Predefined Reports' section with a search bar and several report cards.

7. Example report

For example, this report will return lettings properties where the logged in user is the Property Manager that have a re-let date after 01/09/2022

Other possible criteria options are available and displayed below

The screenshot shows the 'New Property Report' interface with filter criteria applied. The 'Pick Property Criteria' section is active. Two criteria are listed: 'Prp Manager' with the value 'is current user' and 'Morven McCormick', and 'Re-let date' with the value 'after' and '01/09/2022'. A dropdown menu is open for the 'Re-let date' criterion, showing options: 'in preset range', 'between', 'before', 'after', and 'empty'.

8. Add pre-instruction checks option to report

When reporting on pre-instruction checks, the option to include checks with/without an **Archive Date** is available

From reporting screen shown in step 6:

- Click **Pre-Instruction Checks** (from **Linked Records** section)
- Click **Archive Date**
- To return just current checks, set to **empty**
- To return archived/previous checklists: set a date filter e.g. select **after** then enter **date**

The screenshot shows the 'New Property Report' interface. At the top, there are three icons: 'New' (a pencil), 'Save' (a floppy disk), and 'Exit' (a right arrow). Below the title, there is a breadcrumb trail: 'Property Report' with a dropdown arrow, followed by 'Lettings' with a dropdown arrow. Underneath, there are two main sections. The first is 'Property Report' with a house icon and a link 'Pick Property Criteria'. The second is 'Property has pre-instruction checks' with a checklist icon and a link 'Pick Pre-Instruction Check Criteria'. Below this, there is a filter for 'Archive Date' with a dropdown menu. The dropdown menu is open, showing the following options: 'empty', 'in preset range', 'between', 'before', 'after', and 'empty'. The 'empty' option is currently selected.

When matching exclude properties with a sale proceeding or an arranging tenancy - 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 provides the option to exclude properties with a sale proceeding or an arranging tenancy when carrying out an applicant to property match

- For sales properties this will exclude properties that are Sold STC
- For lettings properties this will exclude properties that are Arranging Tenancy/Under Offer

This configuration option allows *all* SSTC/Arranging Tenancy properties to be removed and not displayed in the match results grid

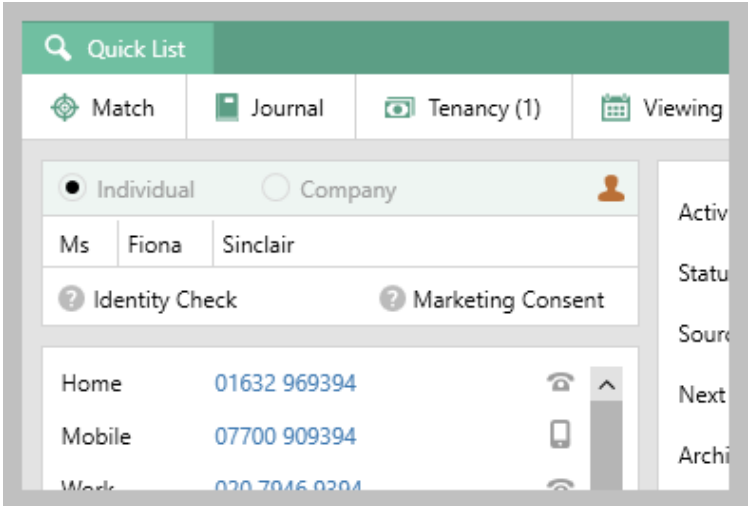
Without this option, SSTC/Arranging Tenancy properties would need to be removed individually from the match results grid

Configuration settings determine the wording used in the match screens shown below, although functionality is the same - for example, your system may be set to display properties as *Under Offer* or *Sale Agreed* rather than Sold STC

To enable this configuration option, contact Reapit Support

From applicant:

- Click **Match**



Sales applicant

- Tick **Sold STC properties**

This will remove any properties that are Sold STC from the match list

- Click **Accept** to run match

Applicant Matching

Properties on System	5699
Department/Active/Price	17
<input checked="" type="checkbox"/> Rooms	17
▶ <input checked="" type="checkbox"/> Attributes	17
<input checked="" type="checkbox"/> Decoration/Tenure/Clients Only	17
<input checked="" type="checkbox"/> Special	17
<input checked="" type="checkbox"/> Square footage	17
<input type="checkbox"/> Location matching by Area	17
<input checked="" type="checkbox"/> Rural/Acreage/Keywords	17
<hr/>	
<input type="checkbox"/> Exclude other agents' properties	
<input checked="" type="checkbox"/> Only properties held by this office	-10
<input checked="" type="checkbox"/> Exclude previous matches	0
<input checked="" type="checkbox"/> Exclude Sold STC properties	-1
<hr/>	
Total number of matches	6

Lettings applicant

- Tick **Exclude Arranging and Under Offer**

This will remove any properties that are Arranging Tenancy or Under Offer from the match list

- Click **Accept** to run match

Applicant Matching

Properties on System	5674
Department/Active/Rent	169
<input checked="" type="checkbox"/> Rooms 169	
▶ <input checked="" type="checkbox"/> Attributes 169	
<input checked="" type="checkbox"/> Tenure/Furnishing 169	
<input type="checkbox"/> Special 169	
<input type="checkbox"/> Square footage 169	
<input type="checkbox"/> Location matching by Area 169	
<input checked="" type="checkbox"/> Rural/Acreage/Keywords 169	
<input type="checkbox"/> Exclude other agents' properties	
<input checked="" type="checkbox"/> Only properties held by this office -22	
<input checked="" type="checkbox"/> Exclude previous matches 0	
<input checked="" type="checkbox"/> <u>Exclude Arranging and Under Offer</u> -2	
Total number of matches 145	

CancelAccept

Supplier VAT/GST removed on works order & supplier invoice when not applicable

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

When VAT/GST has been added to a works order or supplier invoice and the supplier carrying out the works does not charge VAT/GST, the VAT/GST amount will be removed

This applies when creating an individual works order and when booking in bulk, as well as when generating a supplier invoice

This update ensures that VAT/GST isn't being applied when not necessary

1. Create works order

When a works order is created and a **Net Cost** added, VAT/GST will also be added accordingly

The screenshot shows a 'Works Order' form with the following details:

- Works Order:** Status: Pending approval, Booked On: 24/10/2022, Work Type: Select..., Reported By: Select..., Booked By: Kian Kettlewell, Priority: Select...
- Works Details:** Work Title: Change kitchen door handle, Net Cost: £50.00, VAT: £10.00, Our estimate: £0.00, Charge to: Landlord
- Property:** 77 Glynde Mews, Walton Street, SW3 1AB, Landlord: Mr S Ridout, Mobile: 07897675878, Home: Not added, E-mail: sam@keal.com
- Contractor:** Select...
- Activity Feed:** No activity to display

2. Add contractor to works order

When a supplier is added as the contractor on a works order and they are non-VAT/GST registered, the VAT/GST amount is automatically removed from the works order, as well as on the resulting supplier invoice

This is also done when booking works orders in bulk

A supplier can be marked as Non VAT/GST registered on their company/supplier record

Works Order

+ Documents Print Save Share

Works Order	Contractor Able Maintenance, London	Activity Feed
Status: Pending approval Booked On: 24/10/2022 Work Type: Select ... Reported By: Select ... Booked By: Kian Kettlewell Priority: Select ...	Mobile: Not added Business: 02073804440 E-mail: Able@Maintenance.co.uk	No activity to display
Works Details	Property	
Work Title: Change kitchen door handle Net Cost: £50.00 VAT £0.00 Our estimate £0.00 Charge to: <input type="radio"/> Tenant <input checked="" type="radio"/> Landlord Replace door handle	77 Glynde Mews, Walton Street, SW3 1AB Landlord: Mr S Ridout Mobile: 07897675878 Home: Not added E-mail: sam@keal.com	
Instructions	Tenant Select ...	

Identify internal client accounts assistant as a relationship on lettings property - 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 a client accounts assistant to be identified as a relationship on a lettings property - this relationship can be selected when reporting and can also be added to various grids/screens across the system, including property and tenancy grids, arrears, works orders & supplier invoices

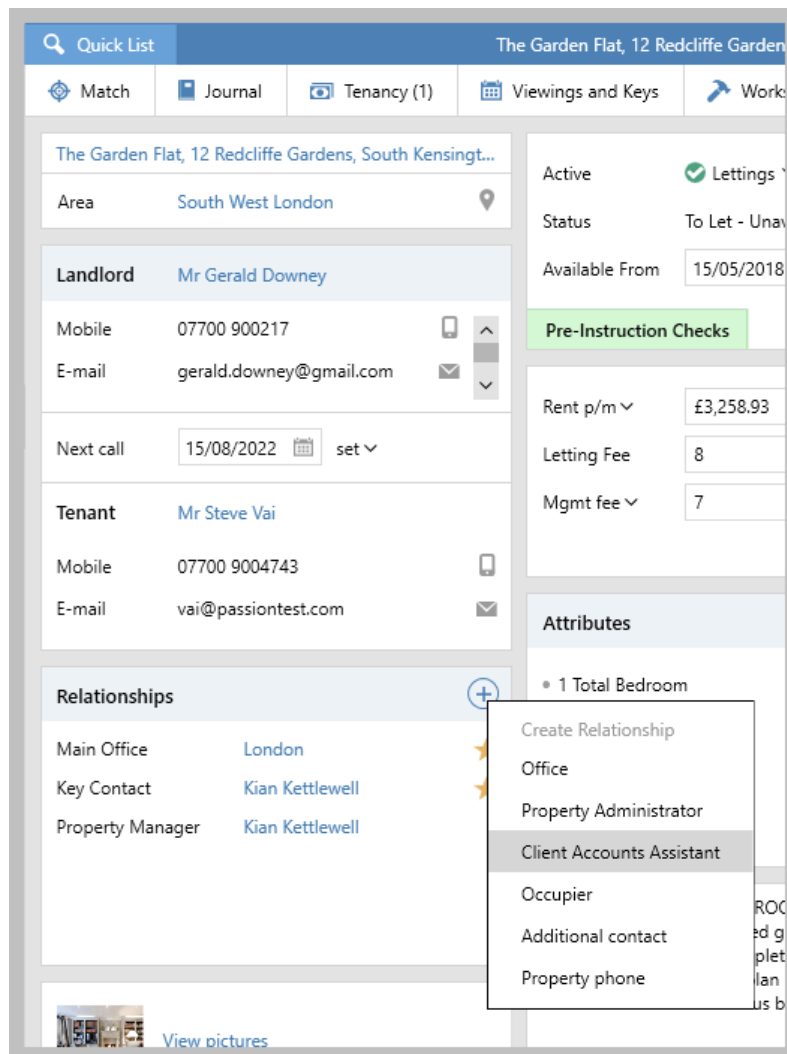
This allows a client accounts assistant to be able to identify & complete tasks required of them

To enable this configuration option, contact Reapit Support

1. Add client accounts assistant

From lettings property:

- In the **Relationships** panel, click 
- Select **Client Accounts Assistant** from the list



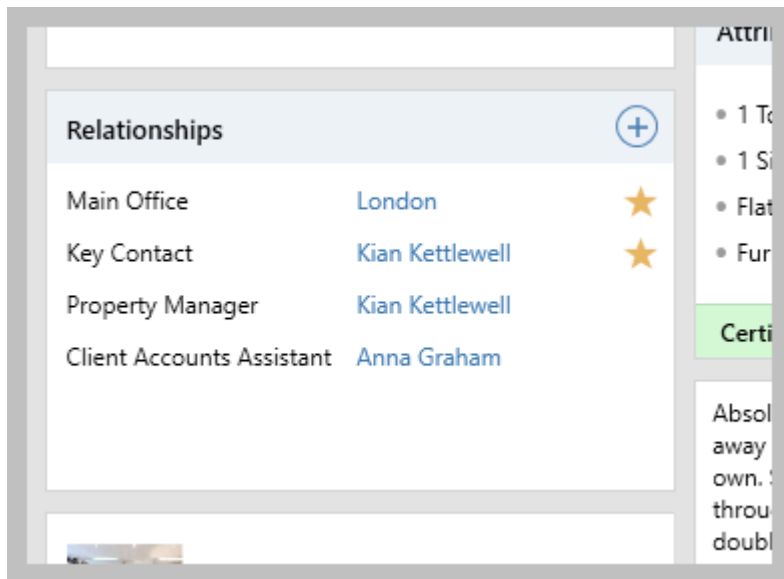
The screenshot displays the Reapit system interface for a property titled "The Garden Flat, 12 Redcliffe Gardens, South Kensington". The interface includes a top navigation bar with a search icon and the property name. Below the navigation bar are several tabs: Match, Journal, Tenancy (1), Viewings and Keys, and Works. The main content area is divided into several sections:

- Property Details:** Area: South West London.
- Landlord:** Mr Gerald Downey. Contact information: Mobile 07700 900217, E-mail gerald.downey@gmail.com.
- Tenant:** Mr Steve Vai. Contact information: Mobile 07700 9004743, E-mail vai@passiontest.com.
- Next call:** 15/08/2022.
- Attributes:** 1 Total Bedroom.
- Pre-Instruction Checks:** Rent p/m £3,258.93, Letting Fee 8, Mgmt fee 7.

The "Relationships" panel is open, showing a list of relationships with a plus icon to add a new one. A dropdown menu is open over the "Relationships" section, listing the following options:

- Create Relationship
- Office
- Property Administrator
- Client Accounts Assistant** (highlighted)
- Occupier
- Additional contact
- Property phone

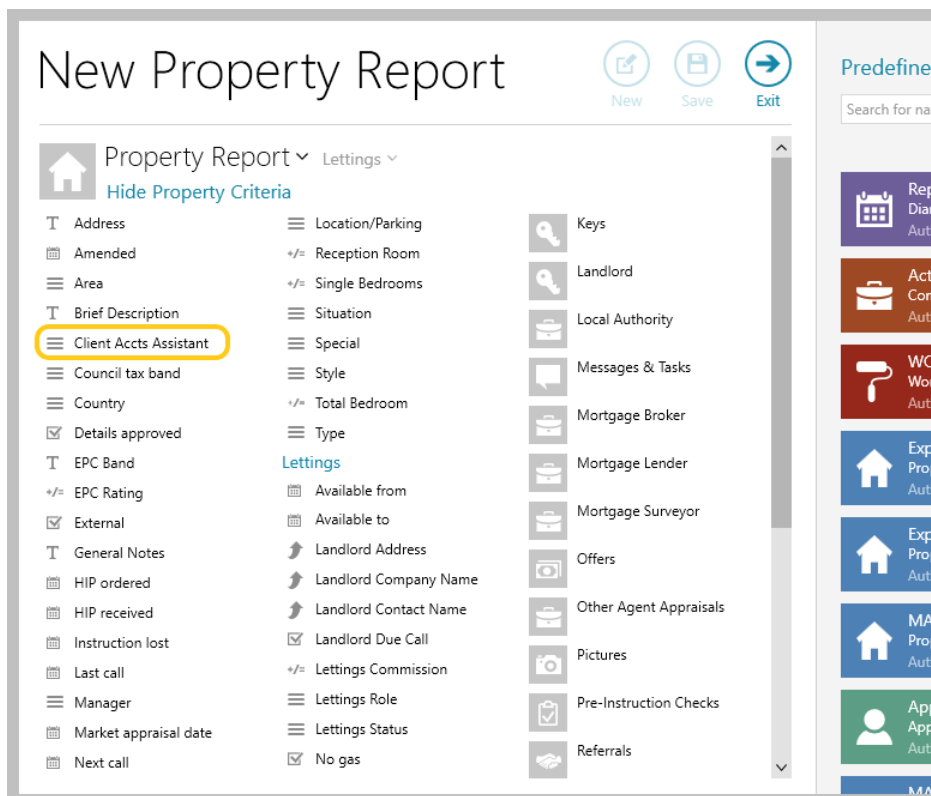
- The **Select Negotiator** window is displayed - tick the name of the relevant AgencyCloud user and click **Select**
- The **Client Accounts Assistant** is displayed in the **Relationships** panel



2. Reporting

From Reports on main menu:

- Click **Power Reports**
- Select **Property Report** for **Lettings** then click **Show more**
- A **Client Accts Assistant** option is available



For example, running this property report will return all properties for this client accounts assistant that have a current tenancy:

The screenshot shows a 'Property Report' interface with the following filters:

- Client Accts Assistant:** any of [Anna Graham X]
- Property has tenancies:** any of [Tenancy Current X]

3. Client accounts assistant shown in grids

The client accounts assistant can be shown in the following grids

With the exception of supplier invoices, the column(s) first need to be added and saved to the grids shown below, see step 4 for instructions on this

- property** - after running a Power Report on properties or when viewing a list from the Organiser (e.g. right-click over *Available Properties* option and select *Full results* to see property grid)

Available Properties - Lettings						
Double-click to view						
Reference	Address	Rent p/m	Status	↓ Client Accounts Assistant	Landl	
LON160017	Flat 8, 17 Hasker Street, Chelsea	£7,517.26	To Let - Available	Simon Crisp	Mr Ke	
LON160019	17 Carlyle Court, Chelsea Harbour	£3,606.55	To Let - Available	Simon Crisp	Mr Ro	
LON160014	12 Thames Quay, Chelsea Harbour	£5,866.07	To Let - Available	Anna Graham	Miss J	
LON150022	77 Cadogan Place, London, SW1X...	£15,208...	To Let - Available	Anna Graham	Mr Ad	
LON140014	14 Oakley House, 103 Sloane Street	£5,214.29	To Let - Available	Anna Graham	Miss N	

- tenancy** - after running a Power Report on tenancies or when viewing a list from the Organiser (e.g. right-click over *Current Tenancies* option and select *Full results* to see tenancy grid)

New Tenancy Report 7 Tenancies						
Property	Client Accounts Assistant	↑ Tenant	Status	Rent p/m	Manag	
17 Old Church Street, Chelsea	Simon Crisp	Mr K Alonso	Tenancy Current	£8,690.48	Kian Ke	
1 Juniper Drive, London, SW18 1AY	Anna Graham	Mr M Barnes and Mr O Sm	Tenancy Current	£3,910.71	Kian Ke	
Flat 36, 13 Earls Court Square	Anna Graham	Mr T Bayliss	Tenancy Current	£3,888.99	Kian Ke	
76 Sloane Court East, London	Anna Graham	Mr S Davies	Tenancy Current	£3,910.71	Kian Ke	
15 Rutland Gate, Knightsbridge	Simon Crisp	Ms Carrie O'Key and Mr To	Tenancy Current	£5,214.29	Kian Ke	
The Garden Flat	Anna Graham	Mr Steve Vai	Tenancy Current	£3,476.19	Kian Ke	
1 Beaufort Gardens, Knightsbridge	Simon Crisp	Miss H Watson	Tenancy Current	£6,930.65	Kian Ke	

- **tenant arrears** - via the Chase Arrears screen and viewing tenant arrears

Arrears - 9 Tenants

Filters Older than days Amounts over All Arrears Tenants Landlords

<input checked="" type="checkbox"/>	Tenant	Property	Outstanding	Full Amount	Client Accounts Assistant	From	Days
<input checked="" type="checkbox"/>	Mr K Alonso	17 Old Church Street, Chelsea	-£153.33	-£8,820.00	Simon Crisp	31/01/2017	2093
<input checked="" type="checkbox"/>	Mr Adam Armstrong	Flat 8, 17 Hasker Street, Chels	£7,496.67	£7,496.67	Simon Crisp	18/03/2022	221
<input checked="" type="checkbox"/>	Mr M Barnes and Mr O Smith	1 Juniper Drive, London, SW11	£18,604.00	£18,604.00	Anna Graham	06/09/2019	1145
<input checked="" type="checkbox"/>	Mrs H Harbinger	7 Cadogan Square, Knightsbri	£14,466.67	£14,466.67	Simon Crisp	25/02/2021	607
<input checked="" type="checkbox"/>	Mr James Hetfield	12 Thames Quay, Chelsea Har	£5,850.00	£5,850.00	Anna Graham	19/05/2016	2350
<input checked="" type="checkbox"/>	Mr Noah Jones	72 Redcliffe Square, London.,	£11,200.00	£11,200.00	Anna Graham	25/02/2021	607
<input checked="" type="checkbox"/>	Mr James Maddison	77 Cadogan Place, London, SV	£45,506.04	£182,000.04	Anna Graham	23/01/2016	2467
<input checked="" type="checkbox"/>	Ms P Scudamore	17 Carlyle Court, Chelsea Har	£27,174.03	£28,773.36	Simon Crisp	12/03/2019	1323
<input checked="" type="checkbox"/>	Mr Steve Vai	The Garden Flat, 12 Redcliffe	£35,750.00	£35,750.00	Anna Graham	15/05/2016	2354

- **works orders**

12 Works Orders for 4 Suppliers

+ Create

Logged	Booked	Supplier	Description	Client Accounts Assistant	Comp
30/03/2016	30/03/2016		Sink Leaking in Bathroom	Simon Crisp	
31/01/2017	31/01/2017	Mario Brothers Plumbing, F...	replace radiator	Simon Crisp	
15/09/2022	15/09/2022	Bobs Electrical Services, We...	Replace entrance security li...	Simon Crisp	
29/09/2022	29/09/2022	Able Maintenance, London	Replace taps on cloakroom...	Simon Crisp	
30/03/2016	26/03/2016	Able Maintenance, London	Repair Fence	Anna Graham	
15/09/2022	15/09/2022	Mario Brothers Plumbing, F...	Repair leaking bath taps	Anna Graham	
10/10/2022	10/10/2022		Supply & fit security light at...	Anna Graham	
10/10/2022	10/10/2022		Repair broken handle on livi...	Anna Graham	

- **supplier invoices**

Pending Invoices

	Amount	Commission	Property	Err	Key Contact	Property Accountant	Property Manager	Property Office	Client Accounts Assistant
	£384.00	£0.00	2 Moncorvo Close		Kian Kettlewell		Kian Kettlewell	London	Simon Crisp
chine	£108.00	£0.00	77 Glynde Mews		Kian Kettlewell			London	Anna Graham

4. Add client accounts assistant column(s) to grids

With the exception of supplier invoices, the column(s) first need to be added and saved to the grids shown above

- A **Client Accounts Assistant Name** and/or a **Client Accounts Assistant Code** column can be added to each grid above (except supplier invoices)

From grid where column needs adding:

- Right-click over the column headings, click **Pick columns**, select **More**, tick **Client Accounts Assistant Name** and/or **Client Accounts Assistant Code**, then click **Accept**
- The new column(s) will be added to the far right side of the grid - click and drag the column heading to the desired position
- Right-click over the column headings again and click **Save grid layout**

Current Tenancies						
Double-click to view						7 Proper
Reference	Address	Rent p/m	Status	Client Accounts Assistant	Client Accounts Assistant Code	Landlord
LON160018	The Garden Flat	£3,258.93	To Let - Unavailable	Anna Graham	AGE	Mr Gerald
LON160010	Flat 36, 13 Earls Court Square	£3,888.99	Tenancy Current - Unavail...	Anna Graham	AGE	Find A Hor
LON140020	76 Sloane Court East, London	£3,910.71	Tenancy Current - Unavail...	Anna Graham	AGE	Mr T Myles
LON160011	1 Juniper Drive, London, SW18 1AY	£3,910.71	Tenancy Current - Unavail...	Anna Graham	AGE	Mr Aldis H
LON160004	15 Rutland Gate, Knightsbridge	£5,866.07	Tenancy Current - Unavail...	Simon Crisp	STU	Mrs Gina B
LON160001	1 Beaufort Gardens, Knightsbridge	£6,930.65	Tenancy Current - Unavail...	Simon Crisp	STU	Mr Timothy
LON140023	17 Old Church Street, Chelsea	£8,690.48	Tenancy Current - Unavail...	Simon Crisp	STU	Mr C Lamp

- Grid functions can be used to sort, filter or group the grid by client accounts assistant
 - To sort the list, click the column heading
 - To filter or group, click to the right of the column heading (to view filter icon) for options to select specific names or to group the list by name