Reapit AgencyCloud 12.157 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

General2
New UI round-up: v12.1572
Update to ID override function5
Sales & lettings/rentals7
Store mortgage offer expiry date7
Add applicant or property from diary when booking viewing or MA11
Update all portals in bulk via property marketing (UK only)15
Internal property inspector in tenancy report16
Update to periodic tenancy reason functionality to add a review date
Workflow available for tenancy renewal negotiations - configuration option
Updates to works order reporting & grids to allow reporting on supplier invoices - configuration option
Restrict changes to 'on hold' & core suppliers - configuration option
Client Accounts

No 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

General

New UI round-up: v12.157

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 screens have been redesigned in 12.157 to bring them in line with previously redesigned screens

All existing functionality exists but with a refreshed look and feel

Pick columns screen

The pick columns screen, seen when adding columns to grids in AgencyCloud now uses the new UI format

From a grid:

• Right-click over grid column headings, select Pick Columns and click More

Double-click to	view				_
Double-click to Reference LON160018 LON160010 LON160011 LON160004 LON140023	Address The Garden Fla Flat 36, 13 Earl 76 Sloane Cou 1 Juniper Drive 15 Rutland Gar 17 Old Church	Save grid layout Reset to default Set filter as defau Convert to curren Pick columns Show yes/no as in Autosize column Autosize all colun Autosize all to fit Export to	ncy > > mage	Area Available from Bathroom Client Accounts Assistant Code Client Accounts Assistant Name Date Available To Let Department Double Bedrooms Full Address Furnishing Incomplete pre-instruction/re-let checks Landlord Location Manager Code Manager Name Office Code Office Name Postcode Reception Room Reference Registered	's As
				Rent p/m	
<				Short Address	
Applicant	preview display			Single Bedrooms	
		A Ms	P Scudamo	• Status	
				Telephone / e-mail	
			Hammond	iotal bedroom	
			James Hetf der due 23	More	
			U-mmond	Cancel	

Choose (1	1	
✓ Reference	^	Move Up		
✓ Short Address				
✓ Rent p/m		Move Down		
✓ Status	- 51			
✓ Landlord				
✓ Telephone / e-mail				
✓ Office Name				
✓ Double Bedrooms				
✓ Single Bedrooms				
 Reception Room 				
✓ Bathroom				
Accommodation summar	у			
Acres				
Age				
Agency				
Alert	×			
<	>			
Width of selected column	80			
	Cancel	Accept		
a screen in AgencyCloud that s	hows data i	n columns - grid featu	ures include:	

Area setup

The area setup screen now uses the new UI format

- Click your name/office at the top of the main menu
- Click Configuration and select Setup Areas
- The Area Setup screen uses the new UI format

q	
	Filter All This Office This Department Archive
London (Super Group)	Area Battersea (BAT) contains:
East Central London (Group)	:51.488518, -0.238877:51.484979, -0.242715:51.484090, -0.244578:51.483453,
East London (Group)	-0.245308;51.479783, -0.247609;51.477533, -0.248718;51.475408, -0.249692;51.473880,
 North London (Group) 	-0.250946;51.472651, -0.252404;51.472109, -0.270438;51.469733, -0.274559;51.468805, -0.275616:51.468191, -0.277338:51.462890, -0.277610:51.462815, -0.278001:51.459152,
North West London (Group)	-0.27794;51.458842, -0.276899;51.456862, -0.274325;51.431632, -0.266025;51.430546,
South East London (Group)	-0.261290;51.427690, -0.260924;51.426689, -0.258963;51.421144, -0.253693;51.415604, -0.251891:51.413036, -0.250350:51.412711, -0.249054;51.409848, -0.247006:51.408330.
✓ South West London (Group)	-0.231891;51.413056; -0.230350;51.412711; -0.249034;51.409646; -0.247006;51.406350; -0.244720;51.406796; -0.240739;51.405969; -0.240152;51.403283; -0.239163;51.402274;
Battersea	-0.234860;51.399847, -0.233156;51.397699, -0.230838;51.396338, -0.227052;51.394654,
Chelsea	 -0.225105;51.392368, -0.224374;51.391886, -0.222294;51.397221, -0.220075;51.399617, -0.125200;51.401752, -0.120900;51.402351, -0.115642;51.403635, -0.112167;51.405643,
Knightsbridge	-0.111236;51.412508, -0.110925;51.413296, -0.106233;51.415115, -0.105252;51.415480,
South West London	-0.105596;51.422489, -0.106385;51.423504, -0.107954;51.435745, -0.108657;51.436370, -0.110602;51.436408, -0.118025;51.447922, -0.131180;51.448196, -0.135947;51.448233,
 West Central London (Group) 	-0.139932;51.449506, -0.140873;51.449628, -0.141732;51.452819, -0.142235;51.453552, -0.144206;51.474933, -0.147428;51.477497, -0.149211;51.478013, -0.149435;51.479267,
West London (Group)	-0.144200;51.4/4953, -0.14/428;51.4/7497, -0.149211;51.4/8013, -0.14945;51.4/9267, -0.165715;51.480933, -0.166383;51.481593, -0.228026;51.483122, -0.228096;51.485108,
Oxfordshire (Super Group)	-0.229186;51.485966, -0.229440;51.487187, -0.231107;51.487214, -0.236450;
	Add Exi

The area 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 Knowledge Base guide titled: *Areas - how to add & manage*

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

Update to ID override function

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

When using a third party for ID checking (such as TransUnion, LexisNexis or Experian) and using the configuration option which allows a user to manually override the check - from AgencyCloud 12.157+, how the manual check is actioned has been updated

This update means that you are now offered just one option to override the check (rather than choosing to pass or fail the override)

For more information on the configuration option (introduced in AgencyCloud 12.146) see Knowledge Base page titled: *ID check override option - configuration option*

1. Manually overriding a check

From a contact record:

- Click Identity Check to access the ID Check screen
- Click the link beside ID Check
- To override the check, click Identify Check Override

Identity Checks and	Registrations				
			8	€	ty Fe
					to fil
 2 Unchecked Documents Added 09/11/2022 by Morven McCormick ID Cancelled 09/11/2022 Cancelled by Morven McCormick Added 27/10/2022 by Gaytri Lad 	ID Check Date Checked by	M	nit to Lex tity Chec		
ID Cancelled 27/10/2022 Cancelled by Gaytri Lad Added 21/10/2022 by Gaytri Lad	Primary ID Expiry	*Driving L 31/05/202		~) che id ha lorve minu
ID Cancelled 19/10/2022	Document	id check.po	df		hand

The Identity Check Override option previously provided the ability to mark the check as Passed or Failed

2. ID check complete

After entering override notes:

• ID Check status now shows as Approved by Identity Check Override

		Identity	Checks and Registrations	
Add New				8
Check	d until 08/01/2023 ed by Morven McCormick I 09/11/2022 by Morven McCormick	ID Check Date	Approved by Identity Check Override 09/11/2022	Override notes authorised by: Morven McCormick Docs checked in branch
🔀 Cancel	ncelled 09/11/2022 Iled by Morven McCormick 8 27/10/2022 by Gaytri Lad	Checked by	Morven McCormick	
🔀 Cancel	ncelled 27/10/2022 lled by Gaytri Lad I 21/10/2022 by Gaytri Lad	Primary ID Expiry	*Driving Licence 09/11/2023	~

The Approved by Identity Check Override was previously labelled as Successful/Failed (manual override) - the ability to fail a manual override is no longer available

Sales & lettings/rentals

Store mortgage offer expiry date

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

An applicant's mortgage offer expiry date can be stored in the sales progress screen and reported on

This provides the ability to keep track of potential issues when managing pipelines in order to progress sales transactions

1. Access sales progress screen

From property Offers screen:

• Click Sales Progress

					Offers		
roperty Status So	old STC - Availa	able Y	Offers & Re	servations	Buyer & Sales Deta	iils	
Available Offers						(+)	Activity Feed
Buyers		Price	Status		Negotiator	Date	Type to filter a
Mr Liam Jones (appl	licant)	£4,250,000	Offer Ac	cepted	Kian Kettlewell	07/09/2022	NOS famo
Miss Amelia Wright	(applicant)	£4,100,000	Offer Pe	nding	Kian Kettlewell	07/09/2022	MOS form 07/09/2022
Miss Daisy Jones (applicant)		£3,900,000) Offer Re	jected	Kian Kettlewell	07/09/2022	Accepted o 07/09/2022
							Liam able to this Friday 07/09/2022
				Optio	ons	>	
Status	Accepted	Include in P	ipeline	Optio		>	
	Accepted Kian Kettlewell		ipeline	-	ons Nemorandum of sale	>	
Status			ipeline	1 N		>	
Status Negotiator	Kian Kettlewell	99%	ipeline	🗹 N 🗢 S	Nemorandum of sale	>	
Status Negotiator Amount	Kian Kettlewell £4,250,000	99%	ipeline	🗹 N 🗢 S	lemorandum of sale ales Progress	>	
Negotiator Amount Date	Kian Kettlewell £4,250,000 07/09/2022 25/11/2022	99%	ipeline	🗹 N 🗢 S	lemorandum of sale ales Progress	>	

2. Log mortgage offer received plus its expiry date

When the mortgage offer has been received

- Tick box to the right of **Offer**
- Enter offer Received date and, beside exp, enter mortgage offer expiry date

		Offer and Sales Progress	
🗹 E-mails			
	Whitehouse e: sam@whitehse.com;	Buyer: Mr Liam Jones e: Jones@hotmail.com; m: 07094005636;	Activity Fe
	tone Solicitors, Stratford	Solicitor: Colemans, Manchester	Type to filt
b: 020 8534 8008;	; f: 020 8534 7007; e: info	b: 0161 876 2500; e: enquiries@colemans.co.uk;	MOS fo
F&F Form	✓ Completed 04/10/2022	Mortgage Required Ves No Unknown	07/09/
Title Deed	✓ Requested 20/10/2022	Percentage of purchase price required 65 %	E Accept
	Received	Submitted 29/09/2022 mit	parties 07/09/
Draft Contract	✓ Sent 10/10/2022	Broker Select	🔲 Liam a
	✓ Received 28/10/2022		exchan
	Approved	Lender First Mortgage	Friday 07/09/
Searches	✓ Paid 05/10/2022	Survey on 05/10/2022 🗰 ✔ Mortgage Valuation	
	✓ Applied 18/10/2022	Surveyor Slide Rule Surveyors	
	Received	Offer Received on 07/10/2022 exp 07/12/2022	
Enquiries	✓ Sent 07/10/2022	Informed Vendor V Buyer	
	✓ Answered 01/11/2022		
Contract Signed	Vendor	Additional Survey Ves No Unknown	
	Purchaser	Туре	
Exchanged	Vendor	Survey on / / 📖	

The mortgage offer expiry date can be set when using the Advanced Sales Progression screen (as shown above)

For more information, see Knowledge Base page titled: Using the sales progress screen

3. Reporting

From Reports on main menu:

- Click Power Reports
- Select Offer Report for Sales
- A Mortgage offer expiry option is available

New Offe			New Save Exit	Search for nam
Offer Reporner Hide Offer Cri Added to system Amended Currency Expected completion	teria Mo Ne Mo Of	ortgage offer expiry gotiator fer date fer price	Linked Records Applicant Property	Re-I Prop Auth
 Expected exchange External Mortgage offer expiry in pr 	≡ Sta	tus This Week ∽	(07/11/2022 to 13/11/2022)	Viev Diary Auth
		Last X Days Today Next X Days Last X Weeks This Week Next X Weeks		Clie Prop Auth Com Auth
		Last X Months This Month Next X Months		Auth Prop Auth
			Run Report	Expi

4. Example report

For example, this report will return offers where the buyer's mortgage offer is due to expire in the next 4 weeks for sales properties in the user's office that have the status of Sold STC - Available/Unavailable

							\frown		
New C	Offer	Rep	ort		(New	Save)) xit
	Report ~ er Criteria	Sales 🗸							
Mortgage offer expir	y in preset rar	nge 🗸	Next∨ 4 🗘 W	/eeks∨	(21/	11/2022	2 to 18/1	12/2022)) X
	de for proper erty Criteria	ty∨							~
Office	is current	office 🗸	London						×
Sales Status	any of	~	Sold STC - Available	e × Sol	d STC - U	navailak	ole ×	~	×
ïew mortgage off	er expiry info	ormation in	n offer report resul	ts grid					
en running an Offe	r report, the m	nortgage off	fer expiry date can l	-	n in the	report	results	grid - I	but
en running an Offe eds to be added and Right-click over th The new column desired position	r report, the m d saved to the e column hea will be added	nortgage off e grid, as fol adings, click to the far rig	fer expiry date can l	be show d select · click ar	Mortgag nd drag t	ge Offe	er Expi	iry	
en running an Offe eds to be added and Right-click over th The new column desired position	r report, the m d saved to the e column hea will be added e column hea	nortgage off e grid, as fol adings, click to the far rig adings agair	fer expiry date can b llows: Pick columns and ght side of the grid - n and click Save gr i	be show d select · click ar	Mortgag nd drag t	ge Offe	er Expi	iry	
en running an Offe eds to be added and Right-click over th The new column desired position Right-click over th	r report, the m d saved to the e column hea will be added e column hea	nortgage off e grid, as fol adings, click to the far rig adings agair	fer expiry date can b llows: Pick columns and ght side of the grid - n and click Save gr i	be show d select · click ar	Mortgag nd drag t	ge Offe	er Expi	iry eading Print	
en running an Offe eds to be added and Right-click over th The new column desired position Right-click over th New Offer Property 47 Beanfield Close, Riseley, B	r report, the m d saved to the e column hea will be added e column hea Repor	adings, click to the far rig adings agair to 5 Offers Buyer Mr Caelan Ferguson	fer expiry date can be llows: Pick columns and ght side of the grid - n and click Save gr id S S Status Offer Accepted	be show d select ∙ click ar id layou Price £185,000	Mortgag nd drag t It Date 15/01/2019	ge Offe the col	er Expi umn he e Offer Exp 22	iry eading Print	
en running an Offe eds to be added and Right-click over the The new column desired position Right-click over the New Offer Property 47 Beanfield Close, Riseley, B Brookside, 16 Station Road,	r report, the m d saved to the e column hea will be added e column hea Repor	hortgage off e grid, as fol adings, click to the far rig adings again to 5 Offers Buyer Mr Sophie Maclean	fer expiry date can be llows: Pick columns and ght side of the grid - n and click Save gri S S S Status Offer Accepted Offer Accepted	be show d select · click ar id layou Price £185,000 £403,050	Mortgag nd drag t It Date 15/01/2019 28/01/2019	ge Offe the col Mortgag 17/11/20 17/11/20	er Expi umn he e Offer Exp 22 22	iry eading Print	
en running an Offe eds to be added and Right-click over th The new column desired position Right-click over th New Offer Property 47 Beanfield Close, Riseley, B	r report, the m d saved to the e column hea will be added e column hea Repor E edfordshire, MK44 1E Dakley, Bedfordshire, 1 rd, MK44 1ES	adings, click to the far rig adings agair adings agair t 5 Offers Buyer Mr Sophie Maclean Mr Alex Ralker	fer expiry date can be llows: Pick columns and ght side of the grid - n and click Save gr id S S Status Offer Accepted	De show d select → click ar id layou Price £1403,050 £12,345	Mortgag nd drag t It Date 15/01/2019	ge Offe the col Mortgag 17/11/20 17/11/20 24/11/20	er Expi umn he e Offer Exp 22 22 22	iry eading Print	

- Grid functions can be used to sort or filter the report results by mortgage offer 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

Add applicant or property from diary when booking viewing or MA

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

At the point of booking a viewing from the diary, a new applicant record can be added - or, for a market appraisal appointment, a new property record can be added When using Block Management with AgencyCloud & booking a market appraisal appointment, a new estate

record can be added

This helps improve efficiency, allowing a convenient appointment date/time to be found for a new client first, before needing to begin creating their new applicant/property record

Create viewing appointment in diary & add new applicant

From diary:

- Find appropriate date/time for the appointment and add all other details as usual
- Enter applicant surname in **Applicant** search field and press enter (or click magnifying glass icon)

⊕ ~	Thursd	lay 10th November	Friday 11th November				
Early 🗸			Diary				
08:00		+ Add Another + Duplicate		🖶 Print 💾	3		
09:00			0 V To 09:30 V	Property LON140002 Confirmed Followed U 17 Old Church Street, Chelsea, SW3 6EP O	lp		
10:00	Viewing*: 11 Edith Terrace, London,	Entry Type Viewing Enter entry comments	Virtual				
11:00	Meeting*: 76 Sloane Court East, Lor	Accompanied Kian Kettlewell	Other Agent				
12:00	Viewing: 15 Rutland Gate, Knightsb	+ Negotiators/Offices Cancelled Repeat	Confirmed	Vendor Mrs C Lampard Abbile 07890 567898	×		
13:00	Market Appraisal*: 10 Moncorvo Ck	Follow Up 12/11/2022	Followed Up	Home 020 987 8968 🖙 E-mail Chris@cfc.co.uk 🖾 🗸			
14:00				Applicant smith Followed U			
15:00							
16:00					J		
17:00							

• If there are no matches, a prompt to create a new applicant record will be offered, click Yes

The usual process to add an applicant will start - add applicant record as usual

• If there are matches, the applicant search screen will be displayed - ensure the applicant record does not exist, then click **Add** (top left)

- Add 💿 Sa	les Cettings						👫 Show Preview	🖶 Print	🖻 Ex
Surname	Quick	• Full		Office	Manager	Name	Address		Min Price
smith	Quick		6-9	LON	KMK	Mr Bob Smith	1 Flotila House, Batterse	a Reach	£2,000,
Address	O Quick	• Full							
Telephone / E-mail									
Code									
Scope All 🗸									
Archive									
	Se	arch	<						

The usual process to add an applicant will start - add applicant record as usual

- When you have finished adding detail to the applicant record, click Save (on applicant record)
- The new applicant record is added to the new viewing appointment

- Add Anoth	her 🕂 Duplicate		🖷 Print	8
1	t selvere			ш <u>,</u>
Entry Date	11/11/2022 🛅 From 09:00	✓ To 09:30 ✓	Property ION140002 Q	onfirr ollowe
Recur every	0 V Unti	// 🗇	17 Old Church Street, Chelsea, SW3 6EP	(
Entry Type	Viewing 🗸	Virtual	V PRIM	4/
Enter entry o	comments		A port	R
✓ Accompany	nied Kian Kettlewell	Other Agent		120
+ Negotiator	s/Offices	Confirmed		10
Cancelled	d Repeat	All Confirmed	Vendor Mrs C Lampard	
	a de la construcción de la constru		Mobile 07890 567898	1
✓ Follow Up	p 12/11/2022 💼	Followed Up	Home 020 987 8968 E-mail Chris@cfc.co.uk	1
			E-mail Chris@crc.co.uk	
Enter follow	up notes		Applicant LON220001	onfiri
			Applicant CON220001 C	ollow
			Mrs Nikki Smith	
			Mobile 07836 987369	
			E-mail nikki.smith89@email.com	
			Home Not added	
			# £400,000 to £750,000	
			General	

Create MA appointment in the diary & add new property

From diary:

- Find appropriate date/time for the appointment and add all other details as usual
- Enter first line of property address or postcode in **Property** search field and press enter (or click magnifying glass icon)

			Ag	encyCloud - Agency Cloud Tra	ining Build Version 31
⊕, ~	Thursday 10th N	ovember	Frid	ay 11th November	
Early∨			Diary		
08:00		+ Add Another + Duplicate			🖶 Print 🗎 🖻
09:00		Recur every 0	rom 10:30 V To 11:30 V V Until / / m	ft Property cadogan	Confirmed
10:00	Viewing*: 11 Edith Terrace, London, SW10 0TC	Entry Type Market Appraisal Enter entry comments	V Virtual		
11:00	Meeting*: 76 Sloane Court East, London, SW3 -	 Accompanied Anna Graham 	Other Agent		
12:00	Viewing: 15 Rutland Gate, Knightsbridge, SW7	Negotiators/Offices Cancelled Re	Confirmed		
13:00	Market Appraisal*: 10 Moncorvo Close, Knight	Follow Up 12/11/2022	Followed Up		
14:00				2 Applicant	G Confirmed Followed Up
15:00					
15.00					
16:00					

• If there are no matches, a prompt to create a new property record will be offered, click Yes

The usual process to add a property will start - add property record as usual

• If there are matches, the property search screen will be displayed - ensure the property record does not exist, then click **Add** (top left)

Address	O Quick			Office	Price	Address	Vendor	Status
		• Full	由	LON	£8,950,000	7 Cadogan Square, Knightsbridge	Mr K Alonso	For Sale - Available
cadogan			. #	LON	£0	65 Cadogan Pier	Mrs T Elliott	Market Appraisal
Vendor	O Quick	• Full	*	LON	£2,250,000	27 Cadogan Gardens, London	Mr J Tizzard	For Sale - Available
Telephone / E-mail								
Code								
Scope Any ∨								
Archive								
	Sea	arch						
			<					>

- When you have finished adding detail to the property record, click **Save** (on property record)
- The new property record is added to the new market appraisal appointment

Entry Date	11/11/2022 🛅 From	10:30 ~ To 11:30 ~	A Property	DN220003 🔍	Confirmed Followed Up
Recur every	0 ~	Until / / 🛗	1 Cadogan Terra	ce, London, SW1A 8H'	
Entry Type	Market Appraisal	✓ Virtual			
Enter entry o	comments			-	
				·O	
 Accompa + Negotiator 	nied Anna Graham	Other Agent Confirmed			
Cancellec			Vendor M	Dean Patterson	^
Currectice				ot added 936 987654	0
✔ Follow Up	12/11/2022 🛗	Followed Up		an.pat90@email.com	▼
Enter follow	up notes				Confirmed
			Applicant	٩	Followed Up

Update all portals in bulk via property marketing (UK only)

This guide has been reviewed against our global client base and classed as relevant to UK only

From AgencyCloud 12.157+, the property marketing screen allows all property portals to be updated in bulk - this is in addition to existing options which allow portals to be updated individually, as outlined in the Knowledge Base page titled: *Updating property information online (UK only)*

This update will help increase efficiency, reducing the number of clicks and resulting time taken both when uploading a new property and when making amendments to existing properties and uploading/updating each property portal

Marketir	g		
Mill Hou	se, Glebe House, 12 St. Andrews Road, MK40 2LJ - Registered 18,	/04/2019 - BED160	
i viewings	and keys •••	_	
	Active 🔮 Sales 🗸	Acti	
	Status For Sale - Available ~	Тур	
	Agency Sole Agent ~ Sub agents		
	Disposal Private Treaty ~	1	
		arketing	
	Asking Price > £195,000	8	
(Update	portals and select Update All		
CUpdate	portals and select Update All		
C Update	portals and select Update All Marketing D	etails	
C Update Sale Board	Marketing D	etails Extra Descri	ptions
	Marketing D		
Sale Board	Marketing D	Extra Descr	scription
Sale Board Type	Marketing D I None • Flag V-board	Extra Descri	scription
Sale Board Type Status	Marketing D Marketing D I None Ilag V-board For Sale V Date 11/11/2022	Extra Descri Long Description Location Floor Lev	scription
Sale Board Type Status Internet URL	Marketing D Marketing D None Flag V-board For Sale V-board Update portals	Extra Descri Long Des Location Floor Lev ghtmove	scription
Sale Board Type Status Internet URL Text	Marketing D	Extra Descri Long Des Location Floor Lev ghtmove opla	scription
Sale Board Type Status Internet URL	Marketing D Marketing D Mone Flag V-board For Sale V Date 11/11/2022	Extra Descri Long Des Location Floor Lev ghtmove opla	scription

Internal property inspector in tenancy report

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

From AgencyCloud 12.157+, criteria is available to allow reports to be filtered by internal property inspector

From AgencyCloud 12.155+, the ability to identify an internal property inspector as a relationship on the tenancy was introduced - for more information, see Knowledge Base page titled: *Identify property inspector as a relationship on tenancy*

1. Property inspector criteria in tenan	cy report						
rom Reports on main menu:							
 Click Power Reports Select Tenancy Report A Prp Inspector option is available 							
New Tenancy	Report	New Save Exit	Predefin Search for I				
Tenancy Report ~ Hide Tenancy Criteria			R P				
Added to system Linker Amended	d Records Applicant	Property	A				
+/= Commission	Appointments	Relocation Agent					
☑ End date confirmed ☑ Manager ☑ Periodic	Checks Contact	Solicitor Terms					
Prp Inspector	Documents	Works Orders	¢,				
	Introduction Agent	Show more	A 4				
iii Start date	Journal Entries		÷				
≡ Status	Messages & Tasks		A				
≡ Туре			7 %				
			_				

2. Example report

For example, running this tenancy report will return all current tenancies with the role of managed tenancy or introducing tenant, where the named person is the property inspector

r.								
l	New Te	nan	cy F	Report	Ne	w Sa	ave Exit) t
l	Tenancy Pick Tenan							
Ŀ	Status	any of	~	Tenancy Current $ imes$			~	×
L	Role	any of	~	Managed tenancy >	Introducing tenant	×	~	×
L	Prp Inspector	any of	~	Morven McCormick	×		~	×
Ар	Property inspector colu roperty inspector colu m tenancy grid: Right-click over the o click Accept The new column will desired position Right-click over the o	mn can be a column head be added to	added and dings, click o the far rig	t Pick columns , s ght side of the grid	elect More , tick Pr - click and drag th			
l	New Ten	ancy	Rep	ort 4 Tena	ancies			
	Property	Te	nant	Status	Property Inspe	ctor 🔻	Rent p/w	Ma
	54 Caldecote Road, Ickv	vell M	Ir Darren John	Tenancy Curr	ent Morven McCorm	iick	£130	0.00 Re
	71 Pemberley Avenue, E	Bedford M	Ir Robin Forres	t Tenancy Curr	ent Morven McCorm	ick	£0	0.00 Cra
	Cornerways, 68 The Em	bankment M	ls Fiona Wilsor	n and Ms D Tenancy Curi	ent Morven McCorm	nick	£450	0.00 Mc

• Grid functions can be used to sort, filter or group the grid by property inspector

Ms Blair Smith

• To sort the list, click the column heading

16 Noble Lane

• 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

Tenancy Current

Morven McCormick

£200.00 Ma

Update to periodic tenancy reason functionality to add a review date

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

When using the configuration option that allows a periodic tenancy reason & notes to be added when marking a tenancy as periodic - from AgencyCloud 12.157+, a review date can be added when making a tenancy periodic

A further configuration option is available which ensures that the periodic tenancy review date must be entered

An option to add an entry in the Property Management panel on the Organiser is also available, this ensures that periodic tenancies are regularly reviewed

For more information on the configuration option (introduced in AgencyCloud 12.152) see Knowledge Base page titled: *Periodic tenancy reason - configuration option*

1. Make tenancy periodic	Mr Steve Vai - The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH -	Registere
From tenancy:	Details Financial & Renewals Agreement Pre-Tenancy Management Post-Tenancy	
• Tick Periodic	Property The Garden Flat, 12 Redcliffe Ga Status € Tenancy Current ∨	6
This can also be done from the tenancy renewal	Landlord Mr Gerald Downey Type Assured Shorthold ~ Mobile 07700 900217 Role Managed tenancy ~	
negotiation screen	E-mail gerald.downey@gmail.com ☑ Tenancy start 15/05/2016 🗐 ✔ Periodic Work 020 7946 0380 ☎ Tenancy end 14/05/2018 🗐 End confirm	med
	Accounts Main: Not Entered Rent £3,476.19 Monthly	
	Main Tenant Mr Steve Vai	
	Na-File 07700 0004742	(+)
2. Enter periodic tenancy reason & review date	Set Periodic	
Enter:		
Reason & Comments as usual	Please enter reason for setting tenancy to periodic Reason Agreed periodic	
• Enter a Review Date Must be a date in the	Review Date 18/11/2022 🛗	
future	Comments Tenant to stay until further notice	
Click OK		
	Cancel OK	

3. Further configuration option

Your system may be configured to ensure the review date is entered

Eind A Home Maufair	iype	Assure	a snortnola v		
Set F	Periodic		enancy 🗸	_	A second second
r Please enter reason for sett	ting tenancy to pe	eriodic, and a	20	Confirm	
	ew date		2		
Reason Default period	dic		Please	specify a review future	date in the
Review Date / / 🛅			20	, at a c	
Comments Tenant to sta	ay indefinitely				
la la				ОК	
			ĸ		
	Cancel	ОК	on		
	_				
				_	
If a date is not entered -	uda a a - Kalut				
enable this configuration c	option, contac	ct Reapit S	upport		
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iew/edit periodic ew date & reason periodic review date & son can be viewed &	Te			Tenancy extende Reason: Agreed	d indefinitely diridic
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5. Add periodic tenancies due for review on Organiser

Periodic tenancies due for review can be flagged on the Property Management panel on the Organiser - this needs to be added to the panel and saved first

From Property Management panel:

- Hover over panel header and click **cog** icon
- Tick Periodic tenancies due for review
- Click tick (top right) to save Panel Setup

See next step

Property Management

0 Q

Panel header:	
Property Management	1
Office scope includes:	
Buckingham 🗙	~
Negotiator scope includes:	
Morven McCormick \times	~
Property Manager Negotiator scope includes:	
Morven McCormick ×	~
Property Administrator Negotiator scope includes:	
Morven McCormick ×	~
Pick categories to display:	+ New Categor
📃 회 Labour only Warranty due to expire	^
PAT Test due to expire	
Soft Furnishings safety due to expire	
📃 👳 System & Appliance insurance due to expire	
System insurance due to expire	
 Periodic tenancies due for review 	
 Periodic tenancies due for review Periodic tenancies due to expire 	

6. View periodic tenancies due for review in Organiser

From Property Management panel:

- Right-click over Periodic tenancies due for review and select Full results
- Periodic tenancies that are due for review are displayed in a grid - this includes tenancies due for review from the current date/previous to the current date

Property Management All By Office Select..∨ Notice to quit for tenancies expiring in 14 days à 1 Tenancies due for renewal in next 30 days 40 Check out appointments to book in next 14 days -6 0 Supplier accreditation expiry in 30 days 5 Tenancy renewal negotiations 345 Post tenancy checks incomplete 300 50 Pre tenancy checks incomplete .0 1600 Outstanding works orders 2379 Works orders to chase 3 0 Inspections to book before due date by 7 days ±ρ 89 Arranging Tenancies 1339 Gas safety certificate expiry in 30 days 890 Electricity safety certificate expiry in 30 days 1066 æ Periodic tenancies due for review 2 Full results Print Setup Exclude New panel

Workflow available for tenancy renewal negotiations - configuration option

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

Automated workflow settings can be used for tenancy renewal negotiations, allowing different automations to be set-up before and/or after saving a tenancy renewal negotiation

For example, workflow could be set-up so that if the renewal reply status was updated for the tenant or landlord, or the rent value changed, an email or internal task could be created

Prior to 12.157, workflow for renewal negotiations was limited to a small number of specific events (such as tenancy renewal completed, tenancy renewal terminated) - this update allows a workflow to be set up when any renewal field is updated

More information on using tenancy renewal negotiations in AgencyCloud is available on the Knowledge Base page titled: *Tenancy renewal negotiation logging*

Workflow is a predefined sequence of steps which are applied to a specific record - often used with task plans, for more information, see Knowledge Base page titled: *Task plan & workflow overview*

Task plans and workflow need to be set-up and configured, contact Reapit Support to request set-up

Updates to works order reporting & grids to allow reporting on supplier invoices - configuration option

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

In AgencyCloud 12.157+, a configuration option is available which allows supplier invoice information to be reported on and shown in works order grids

This option provides a wide range of supplier invoice related data in works order reports - allowing you to use the works order report to be more informed to manage and advise suppliers

To enable this configuration option, contact Reapit Support

1. I	Run works order report			
Fro	m Reports on main menu:			
• •	Click Power Reports Select Works Orders An Invoice Paid Date option is a	vailable		
	New Works	Orders	Reporer Repore	
	Works Orders Re Hide Works Orders Cri	1		
	≡ Booked By	Priority	Linked Records	î
	Booked Date	E Reported By	froperty Property	
	Completed Date //= Estimated Cost	Required By Date Status	Supplier	2
	Invoice Paid Date	Work Type	Tenancy	
	Invoice Status	T Works Title		
	🖮 Logged Date			
	+/= Net Amount			
				A

2. Example report

For example, running this works order report will return all completed works orders for Jones & Jones Maintenance that have the invoice status of posted and have been paid in the last 6 months

	orders Rep	port~	Se
Status	orks Orders Crite	Completed ×	×
status	any of		
nvoice Status	any of	V Posted X	×
nvoice Paid Date	in preset range	✓ Last ✓ 6 2 Months ✓ (01/05/2022 to 31/10/2022	2) ×
	rders has a supplie Ipany Criteria	٢×	~
Company Name	contains	✓ Jones & Jones Maintenance	×

3. New grid columns

The following new supplier invoice related grid columns can be added and saved on a works order grid

From works order grid:

• Right-click over the column headings, click **Pick columns**, select **More**

Logged Booked 03/08/2020 03/08/2020 12/03/2021 12/03/2021 02/01/2020 02/01/2020 24/03/2020 24/03/2020	Supplier GA & S Ga British Gas Chimanee,	Description Export to Pick columns Save grid layout Reset to default Convert to currency Autosize column Autosize all columns to fit screen	Gross Amount Key Contact Landlord email Landlord Full Address Landlord name Landlord phone Landlord Short Address Logged Net Amount Priority Quote Summary Reference Reported by Required by	nt 0.00 0.00	Book Reapi Reapi Reapi
<			 Short property / estate address Status Supplier Supplier Full Address Supplier Short Address Supplier telephone / e-mail Ten End Date Type VAT Amount More 		

- The following new columns can be added to the grid:
 - Amount Paid
 - Authorised by Property Manager
 - Charge To
 - Date Authorised by Property Manager
 - Date Paid
 - Invoice Agent Commission
 - Invoice Dated
 - Invoice Due Date
 - Invoice Net
 - Invoice Nominal Account
 - Invoice Ref
 - Invoice Referral Fee
 - Invoice Status

- Invoice Total
- Invoice VAT/GST
- Nominal Account
- Outstanding Balance
- Post to Accounts Date
- Post to Accounts User
- Property Reference
- Supplier Reference
- When all required columns have been selected, click Accept
- The new columns will be added to the far right side of the grid click and drag column headings to the desired position
- Right-click over the column headings again and click Save grid layout
- Grid functions can be used to sort, filter or group the grid
 - 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

Restrict changes to 'on hold' & core suppliers - configuration option

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

Two configuration options are available that prevent changes being made to the 'on hold' and/or core supplier setting on the supplier company screen

To enable either/both of these configuration options, contact Reapit Support

This update allows authorised users only to control which suppliers are classed as 'on hold' and/or core

Both 'on hold' and core supplier functionality are configuration options that were introduced in AgencyCloud 12.155 - for more information on this functionality, see Knowledge Base pages titled: 'On hold' suppliers - configuration option Add core suppliers - configuration option

ier details Contact details Activity
ations
Expiry Details
23/06/2023
_
Ad
ts and Terms Transactions Payn
Enter
Select
to agent on supplier invoices 0.000 %
to agent on supplier invoices 0.000 %