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

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

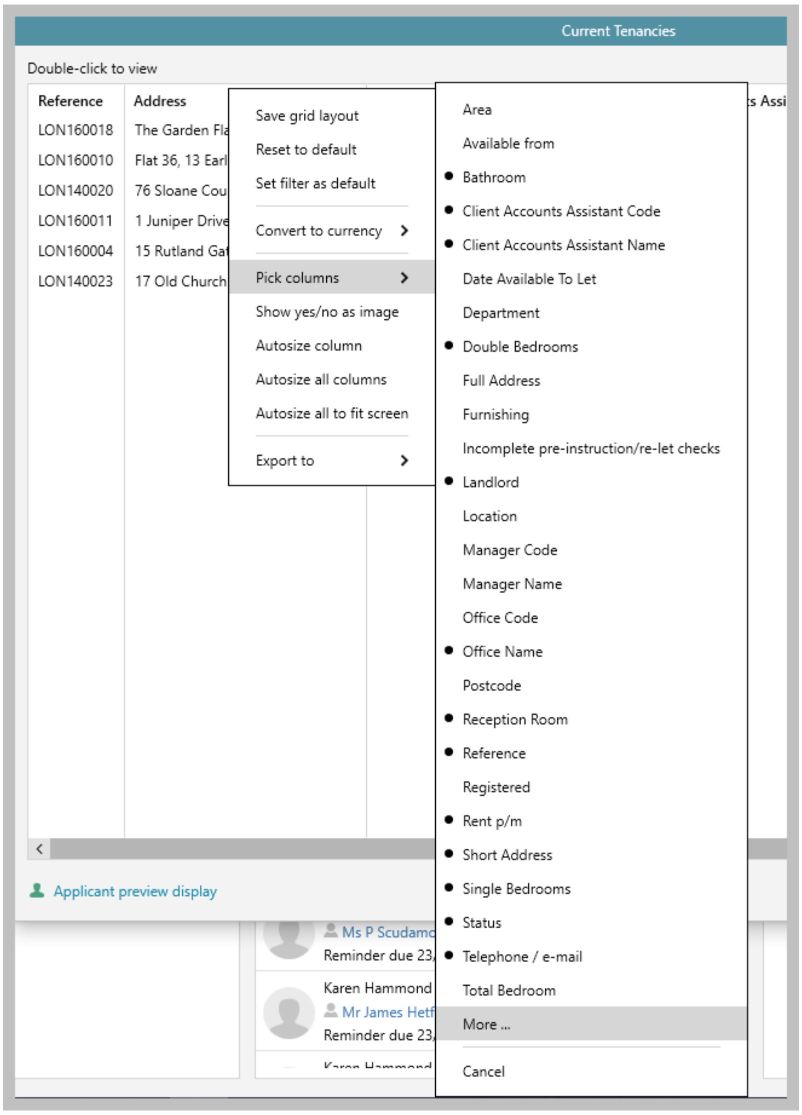
All existing functionality exists but with a refreshed look and feel

Pick columns screen

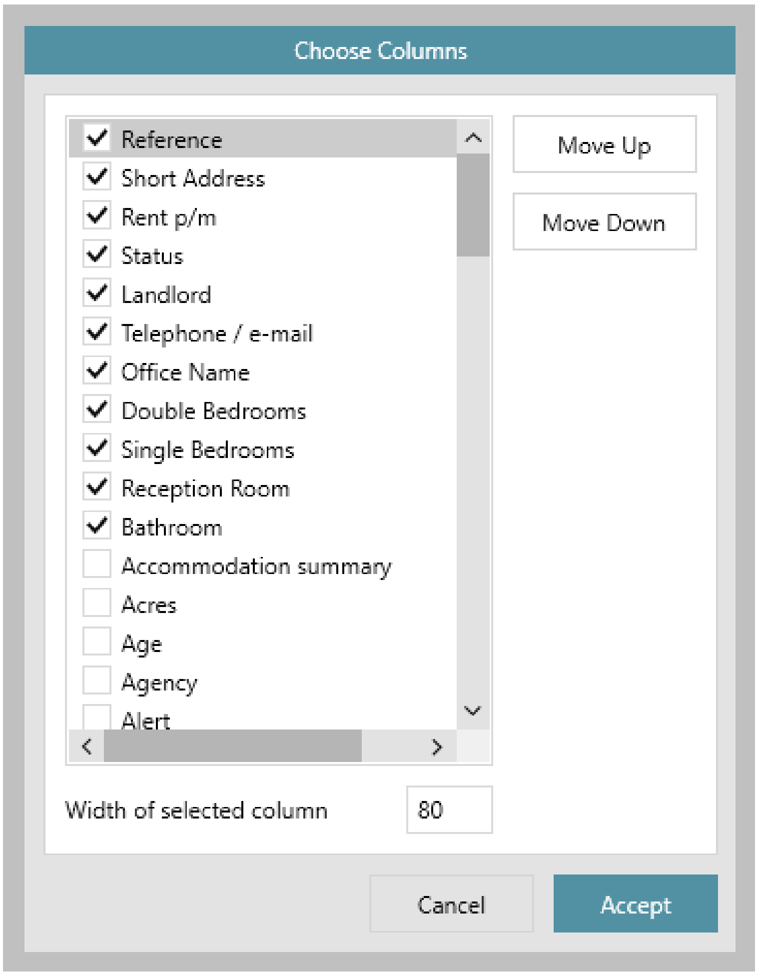
The pick columns screen, seen when adding columns to grids in AgencyCloud now uses the new UI format

From a grid:

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



- The screen uses the new UI format



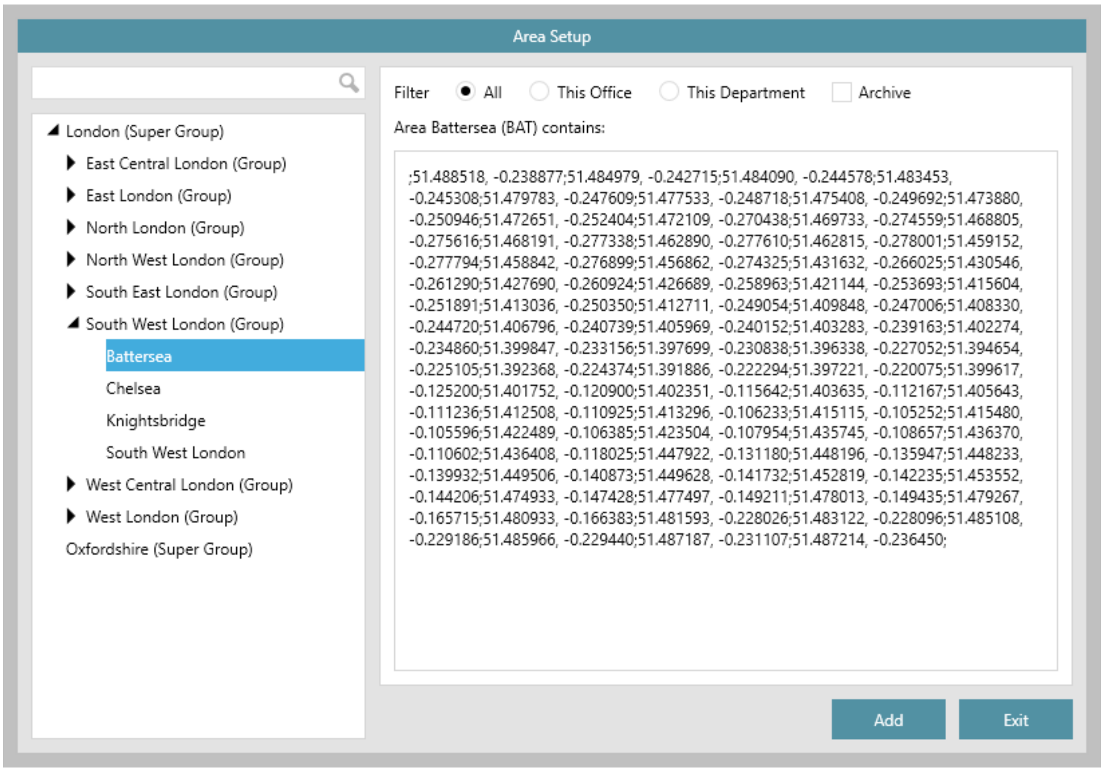
A grid is a screen in AgencyCloud that shows data in columns - grid features include:

- click column headings to sort the data in ascending/descending order
- click to the right of the column heading for options to filter and/or group the data
- right-click the columns for some/all options shown above (dependent on the grid in use)
- changes to grids can be saved via the right-click option (shown above)

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



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

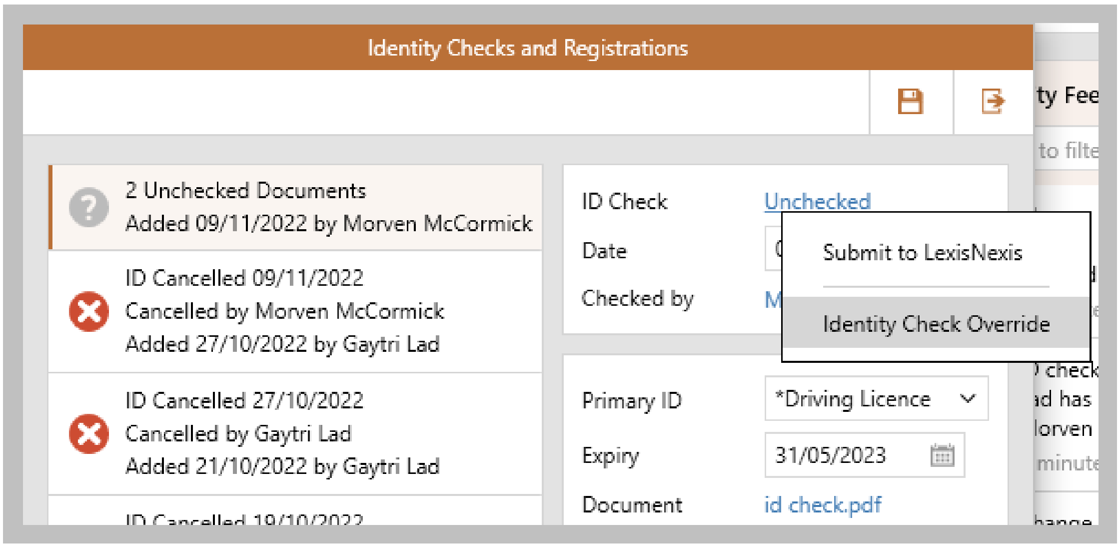
This update means that you are now offered just one option to override the check (rather than choosing to pass or fail the override)

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**

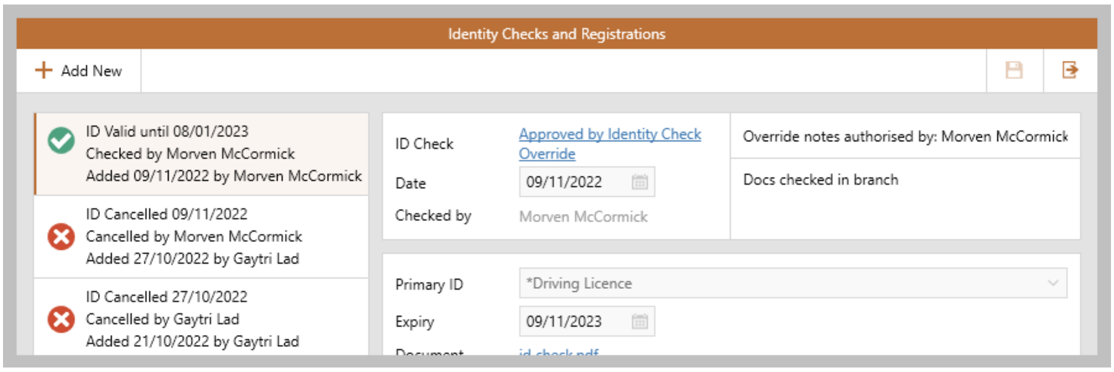


The **Identity Check Override** option previously provided the ability to mark the check as **Passed** or **Failed**

2. ID check complete

After entering override notes:

- **ID Check** status now shows as **Approved by Identity Check Override**



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

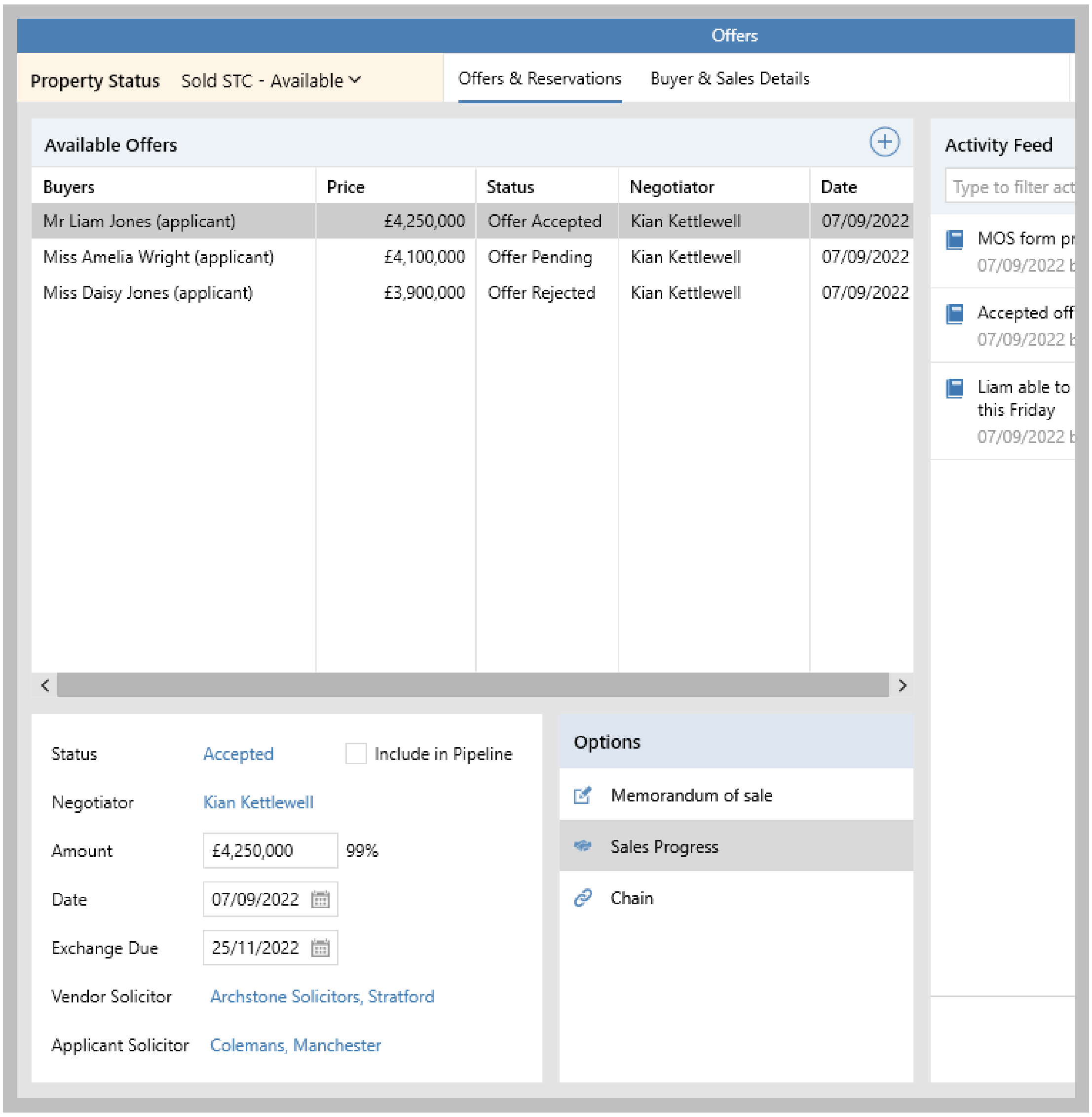
An applicant's mortgage offer expiry date can be stored in the sales progress screen and reported on

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:

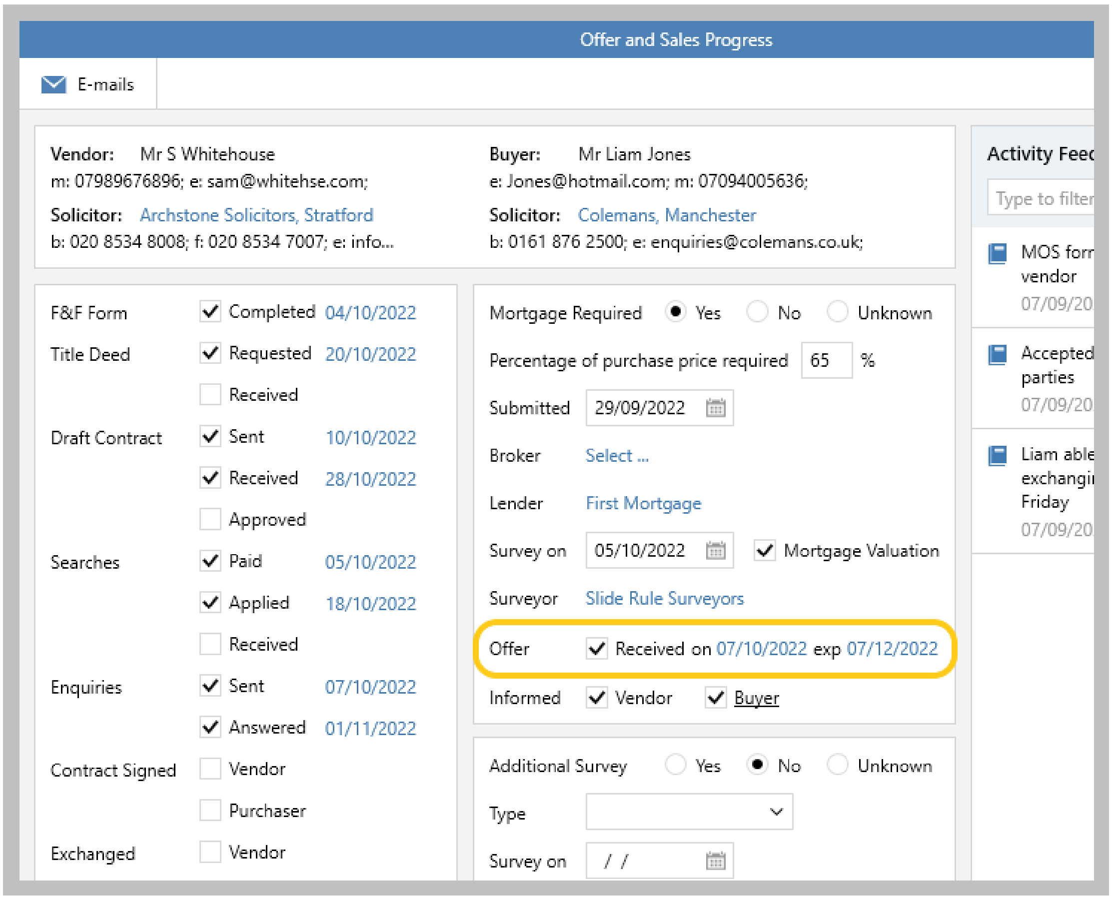
- Click **Sales Progress**



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



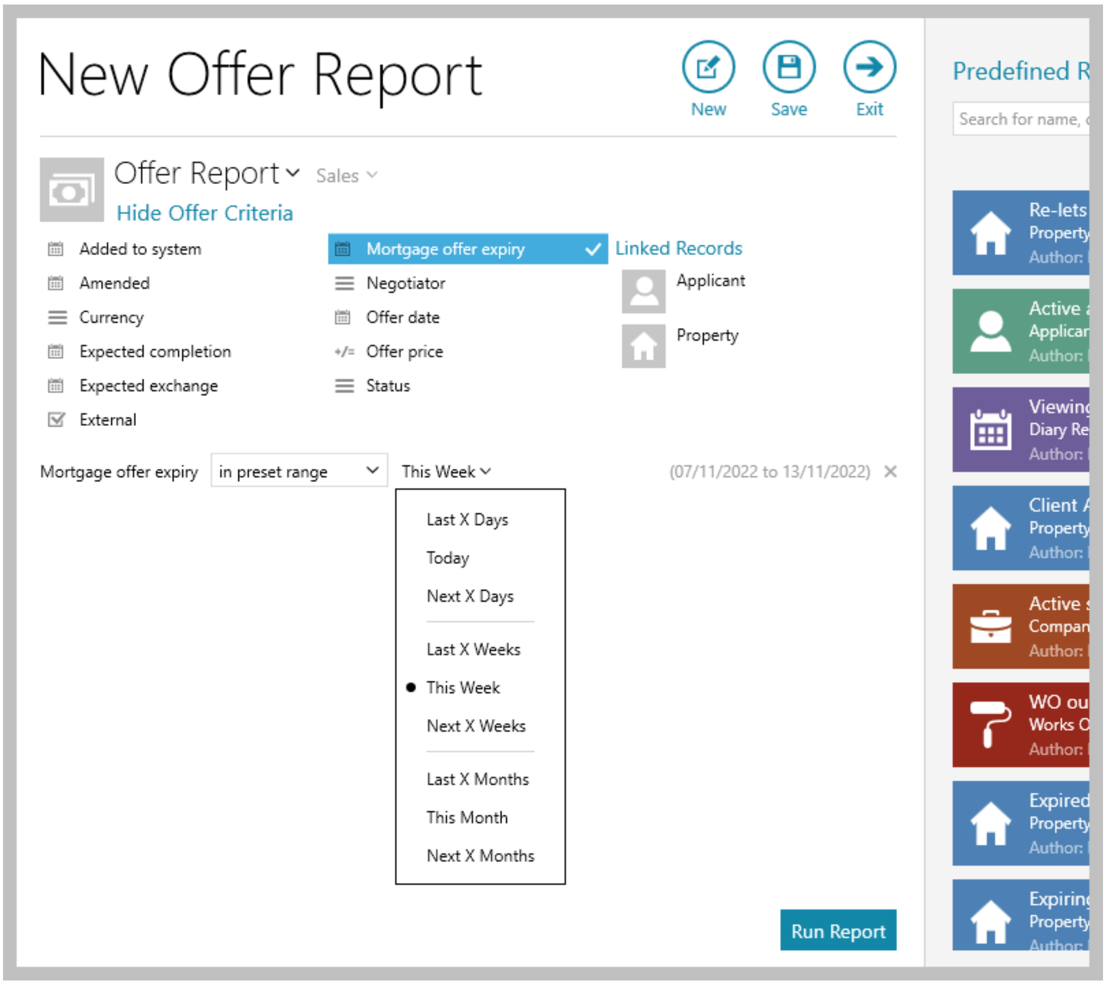
The mortgage offer expiry date can be set when using the Advanced Sales Progression screen (as shown above)

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

3. Reporting

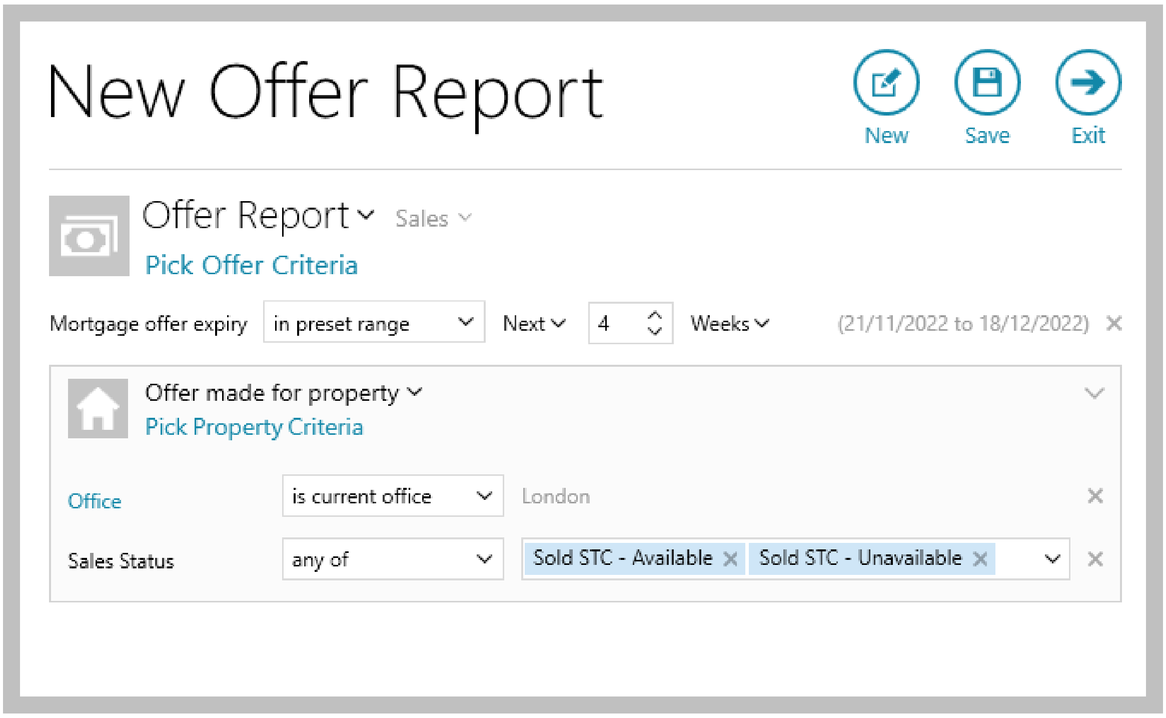
From Reports on main menu:

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



4. Example report

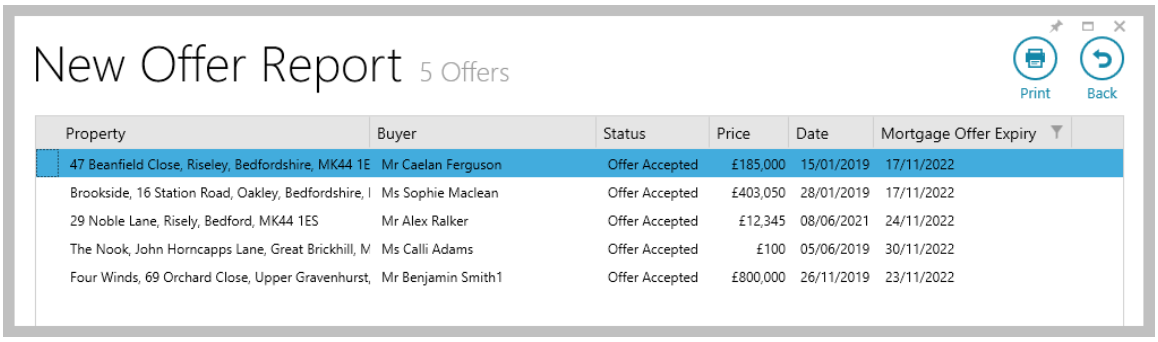
For example, this report will return offers where the buyer's mortgage offer is due to expire in the next 4 weeks for sales properties in the user's office that have the status of Sold STC - Available/Unavailable



5. View mortgage offer expiry information in offer report results grid

When running an Offer report, the mortgage offer expiry date can be shown in the report results grid - but first needs to be added and saved to the grid, as follows:

- Right-click over the column headings, click **Pick columns** and select **Mortgage Offer Expiry**
- 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**



- 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

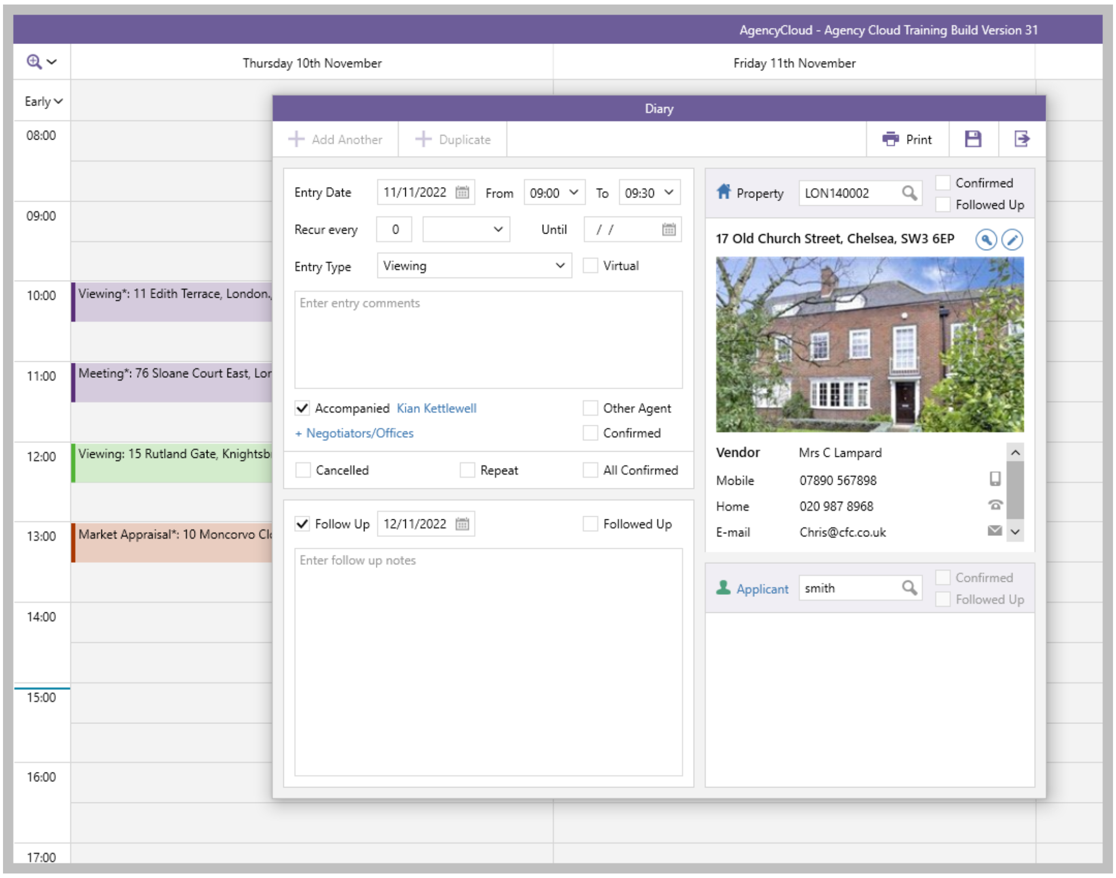
At the point of booking a viewing from the diary, a new applicant record can be added - or, for a market appraisal appointment, a new property record can be added
When using Block Management with AgencyCloud & booking a market appraisal appointment, a new estate record can be added

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:

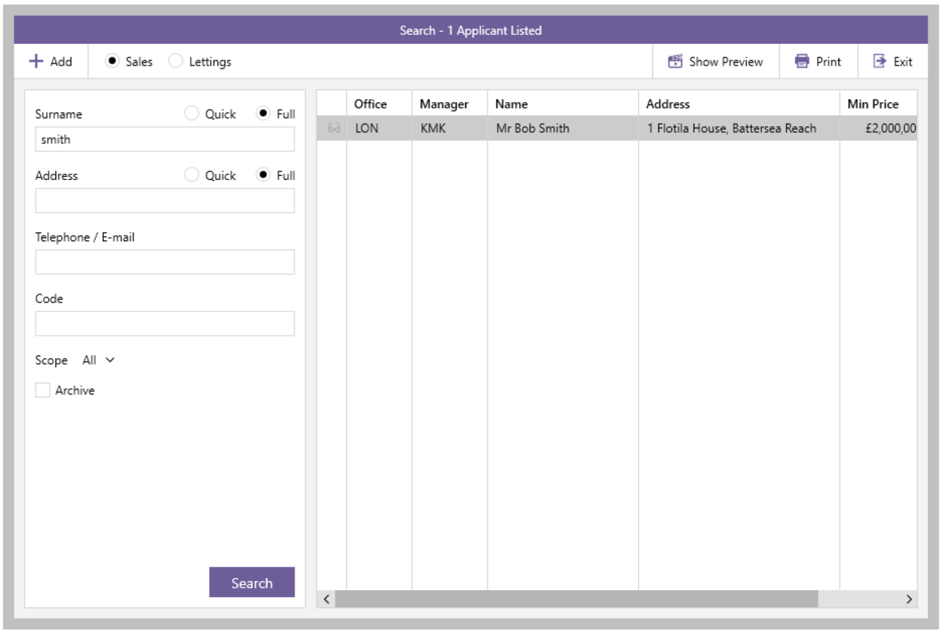
- Find appropriate date/time for the appointment and add all other details as usual
- Enter applicant surname in **Applicant** search field and press enter (or click magnifying glass icon)



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

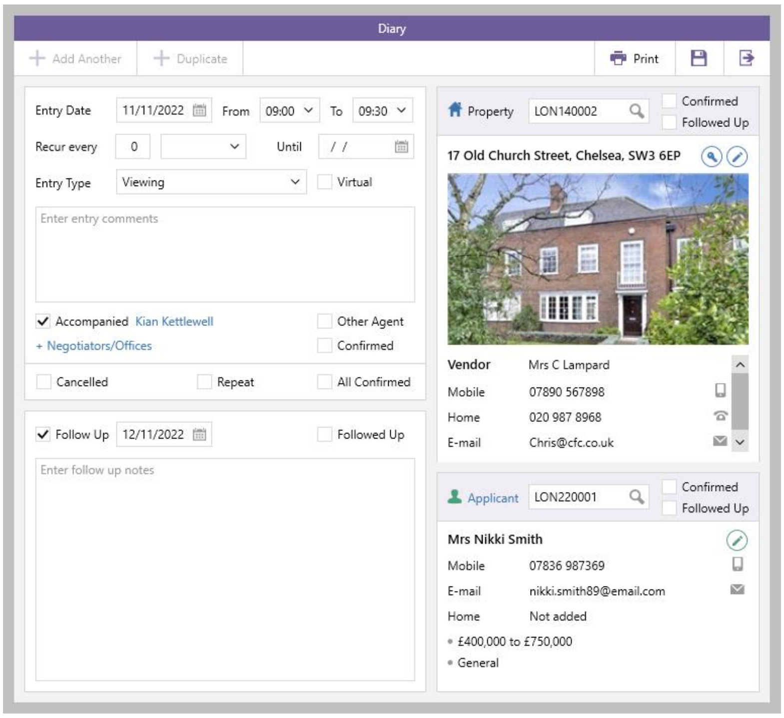
  The usual process to add an applicant will start - add applicant record as usual

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



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

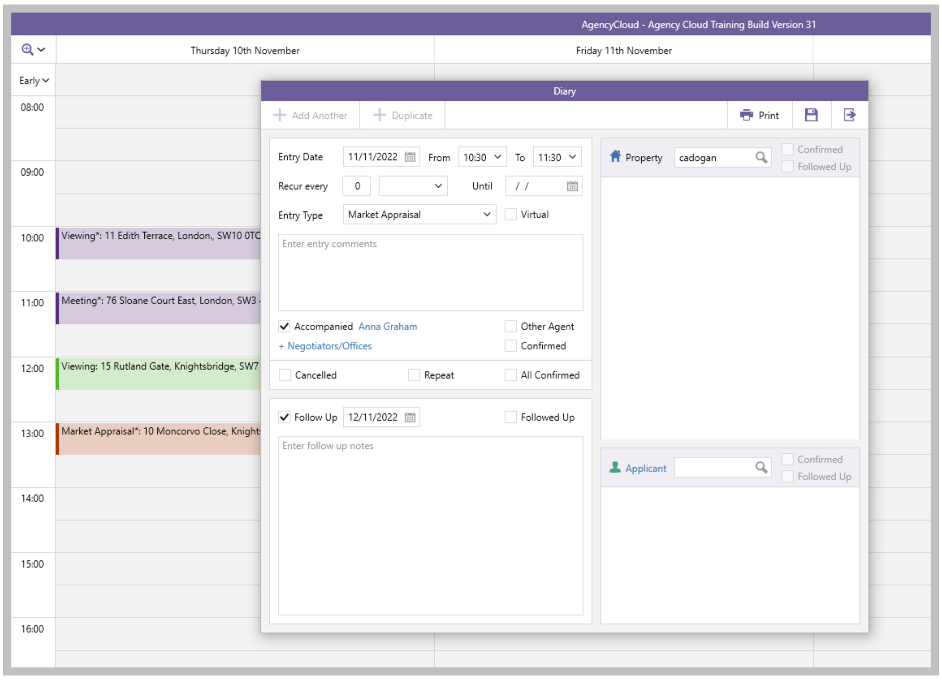
- When you have finished adding detail to the applicant record, click **Save** (on applicant record)
- The new applicant record is added to the new viewing appointment



Create MA appointment in the diary & add new property

From diary:

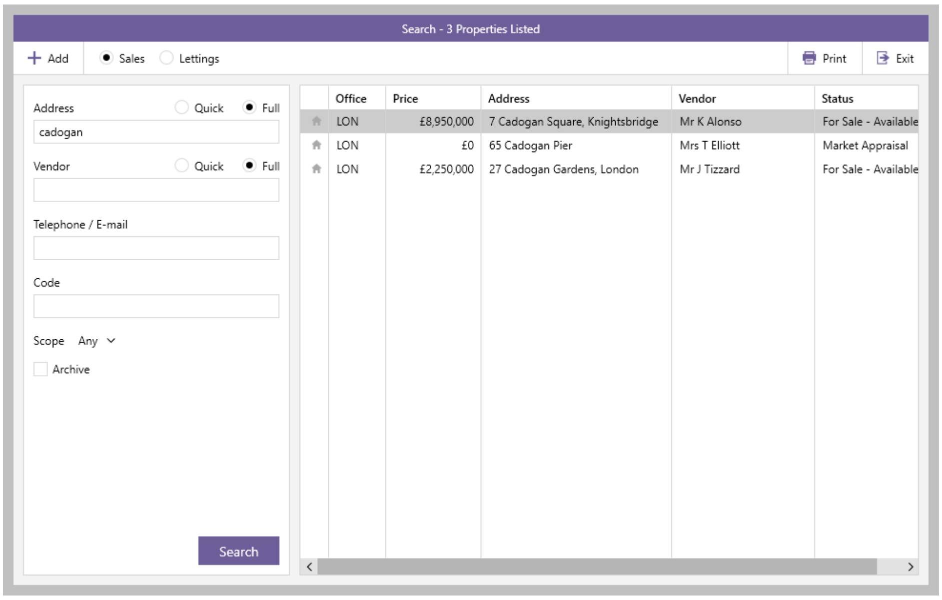
- Find appropriate date/time for the appointment and add all other details as usual
- Enter first line of property address or postcode in **Property** search field and press enter (or click magnifying glass icon)



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

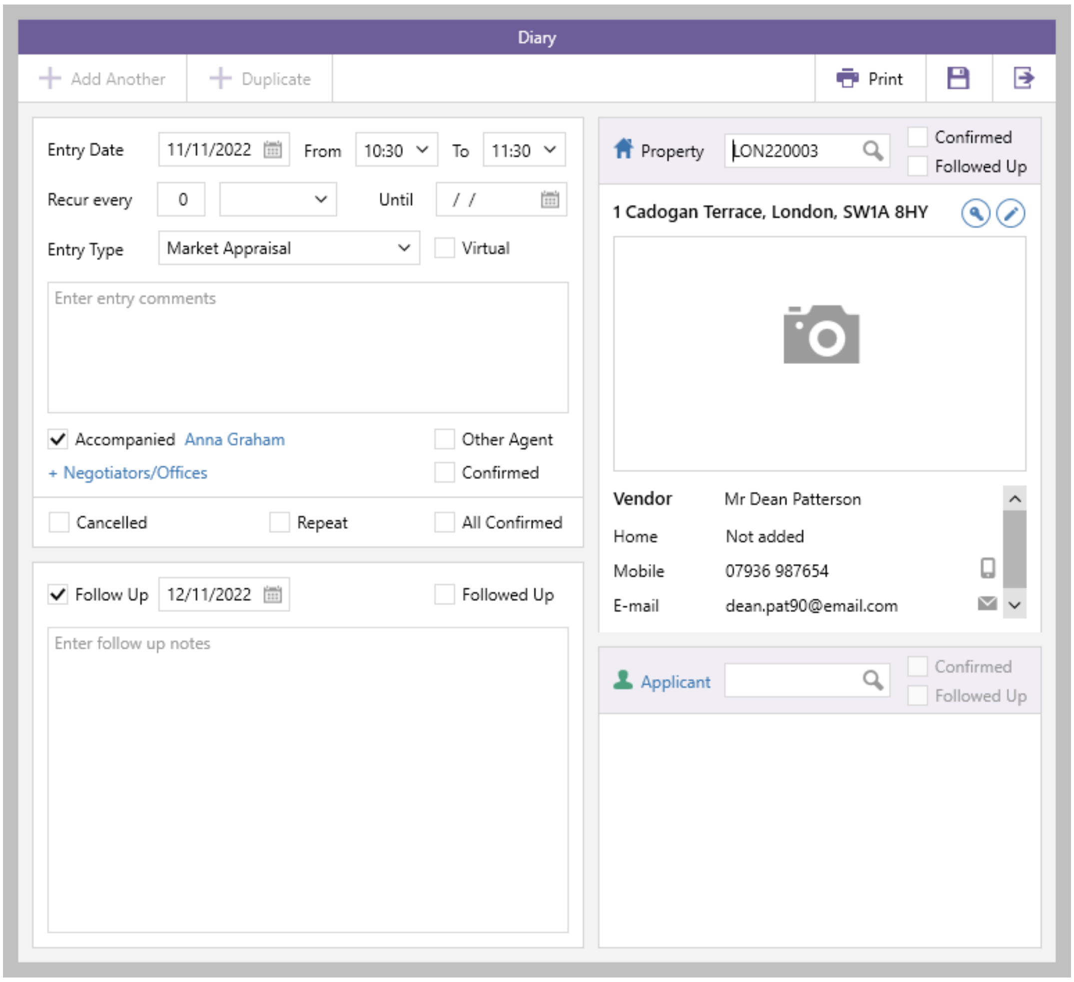
The usual process to add a property will start - add property record as usual

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



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

- 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



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***

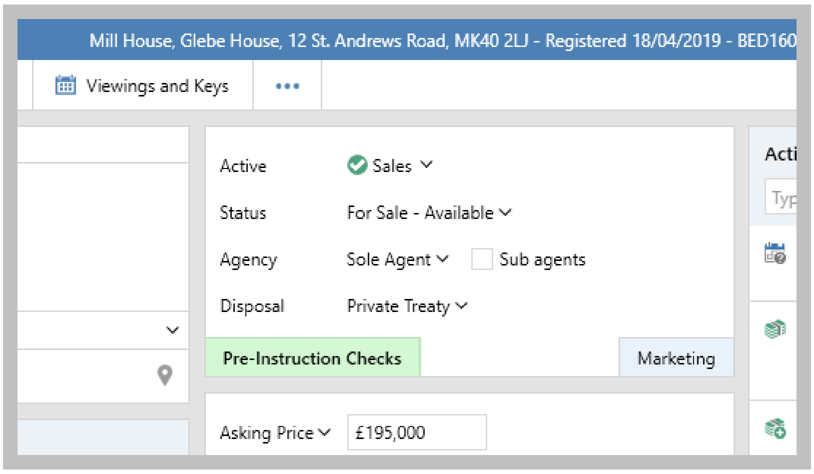
From AgencyCloud 12.157+, the property marketing screen allows all property portals to be updated in bulk - this is in addition to existing options which allow portals to be updated individually, as outlined in the Knowledge Base page titled: *Updating property information online (UK only)*

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

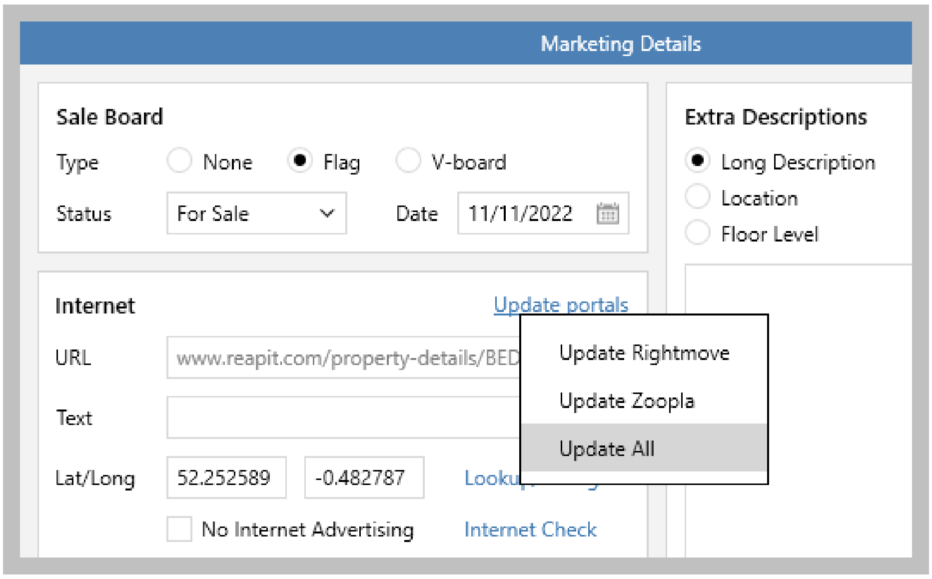
Update all portals

From property:

- Click **Marketing**



- Click **Update portals** and select **Update All**



A confirmation message is displayed to confirm that all portals have been updated (this confirmation also includes information on which portals required updating)

Internal property inspector in tenancy report

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

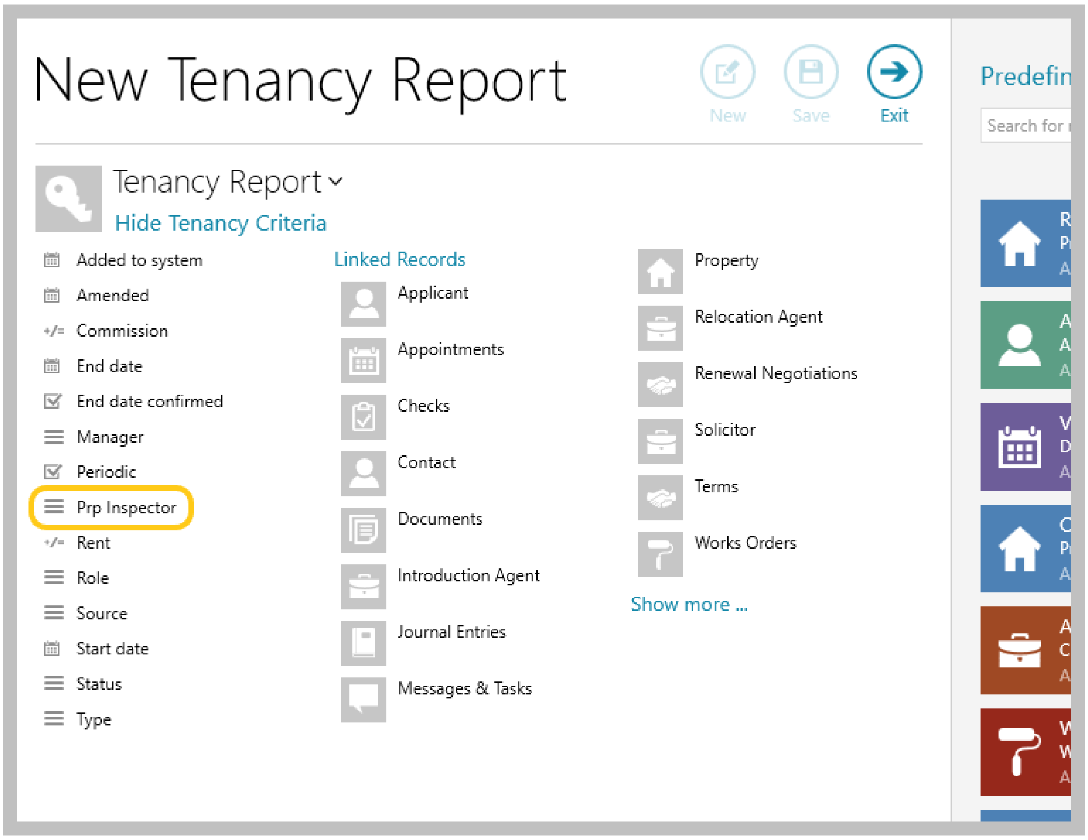
From AgencyCloud 12.157+, criteria is available to allow reports to be filtered by internal property inspector

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 tenancy report

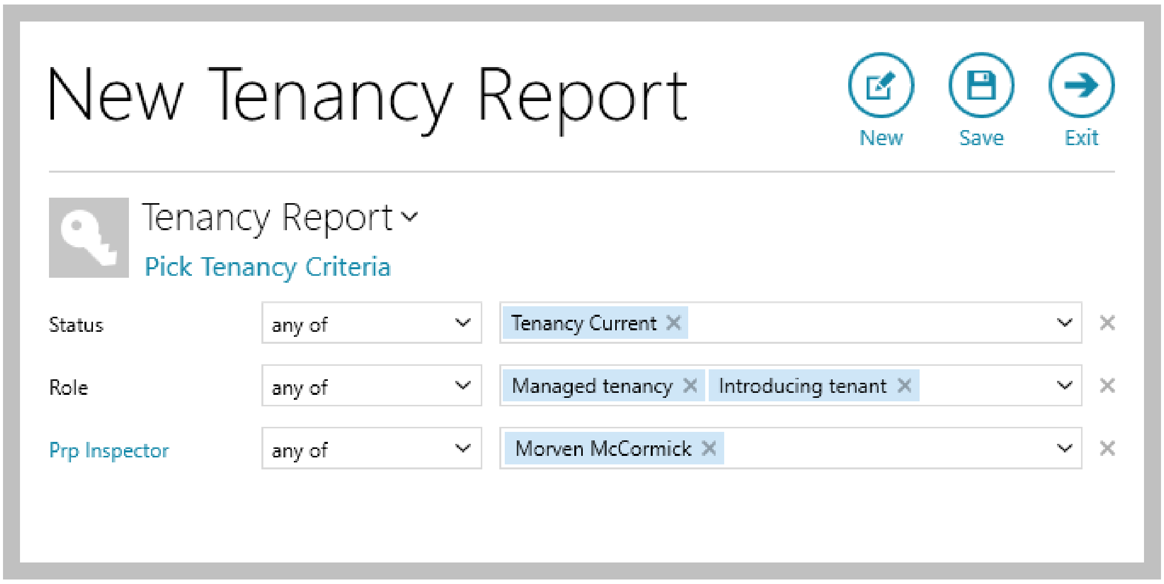
From Reports on main menu:

- Click **Power Reports**
- Select **Tenancy Report**
- A **Prp Inspector** option is available



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

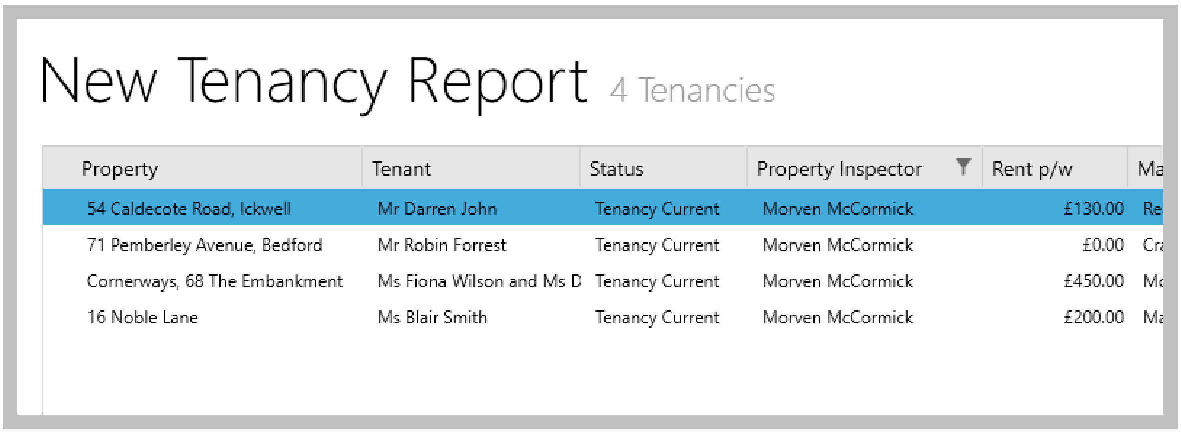


3. Property inspector column in grid

A property inspector column can be added and saved on a tenancy grid

From tenancy grid:

- Right-click over the column headings, click **Pick columns**, select **More**, tick **Property Inspector** 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**



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

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

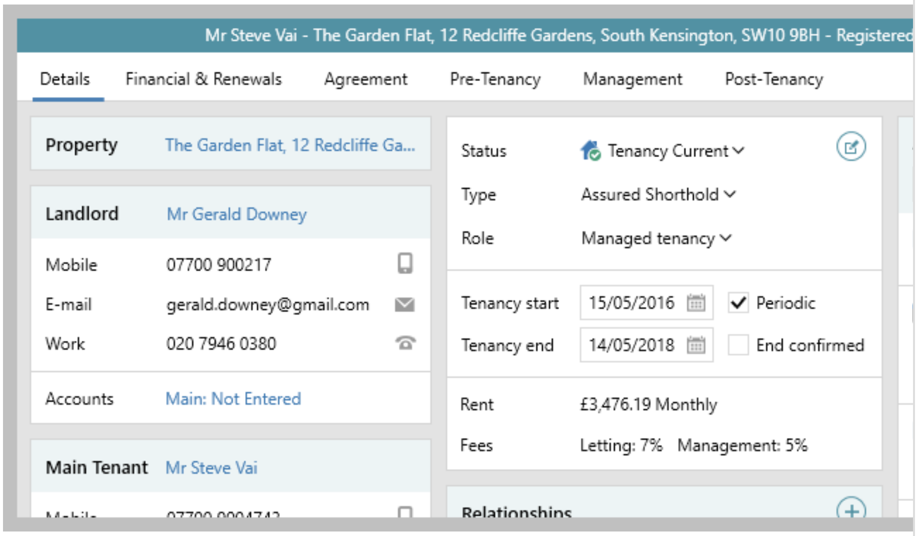
For more information on the configuration option (introduced in AgencyCloud 12.152) see Knowledge Base page titled: *Periodic tenancy reason - configuration option*

1. Make tenancy periodic

From tenancy:

- Tick **Periodic**

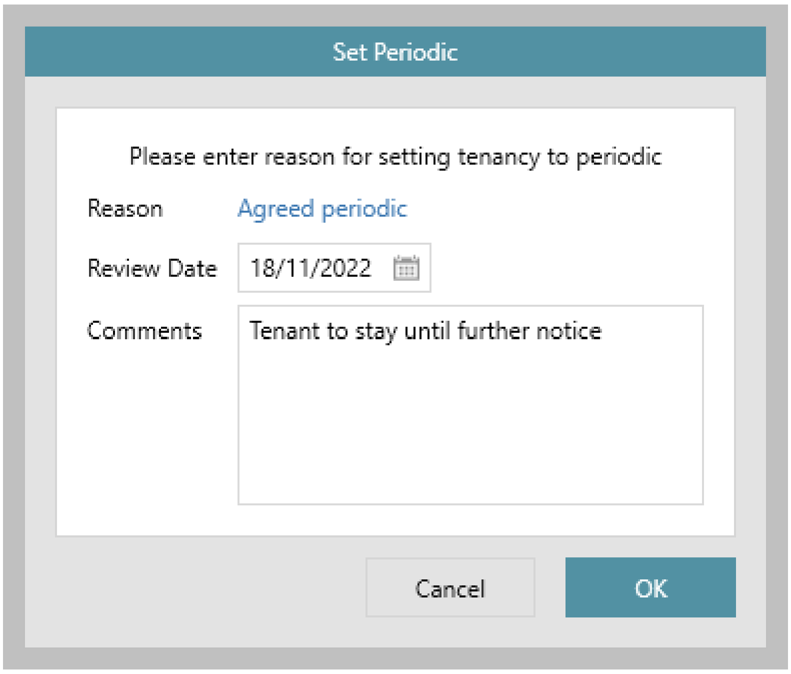
This can also be done from the tenancy renewal negotiation screen



2. Enter periodic tenancy reason & review date

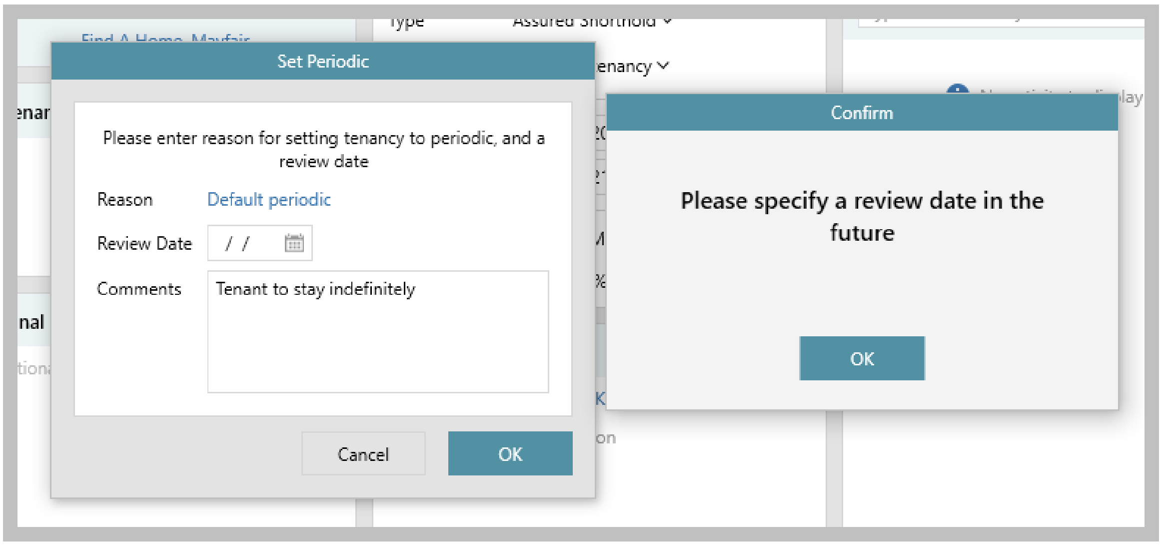
Enter:

- **Reason** & **Comments** as usual
- Enter a **Review Date** *Must be a date in the future*
- Click **OK**



3. Further configuration option

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



- If a date is not entered - when clicking **OK**, a prompt will be displayed
- Enter review date and click **OK** again

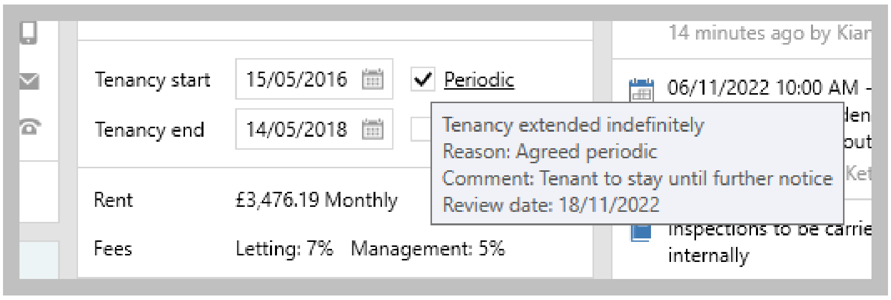
To enable this configuration option, contact Reapit Support

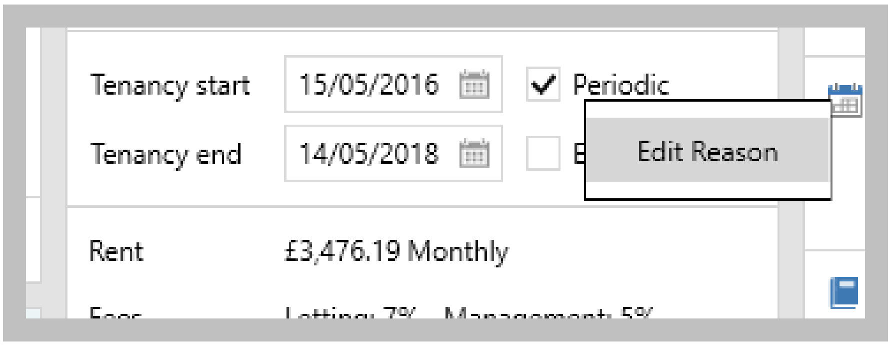
4. View/edit periodic review date & reason

The periodic review date & reason can be viewed & changed at any time

From tenancy:

- To view: hover over **Periodic** to view information in a tool tip
- To edit: right-click **Periodic** and select **Edit Reason**





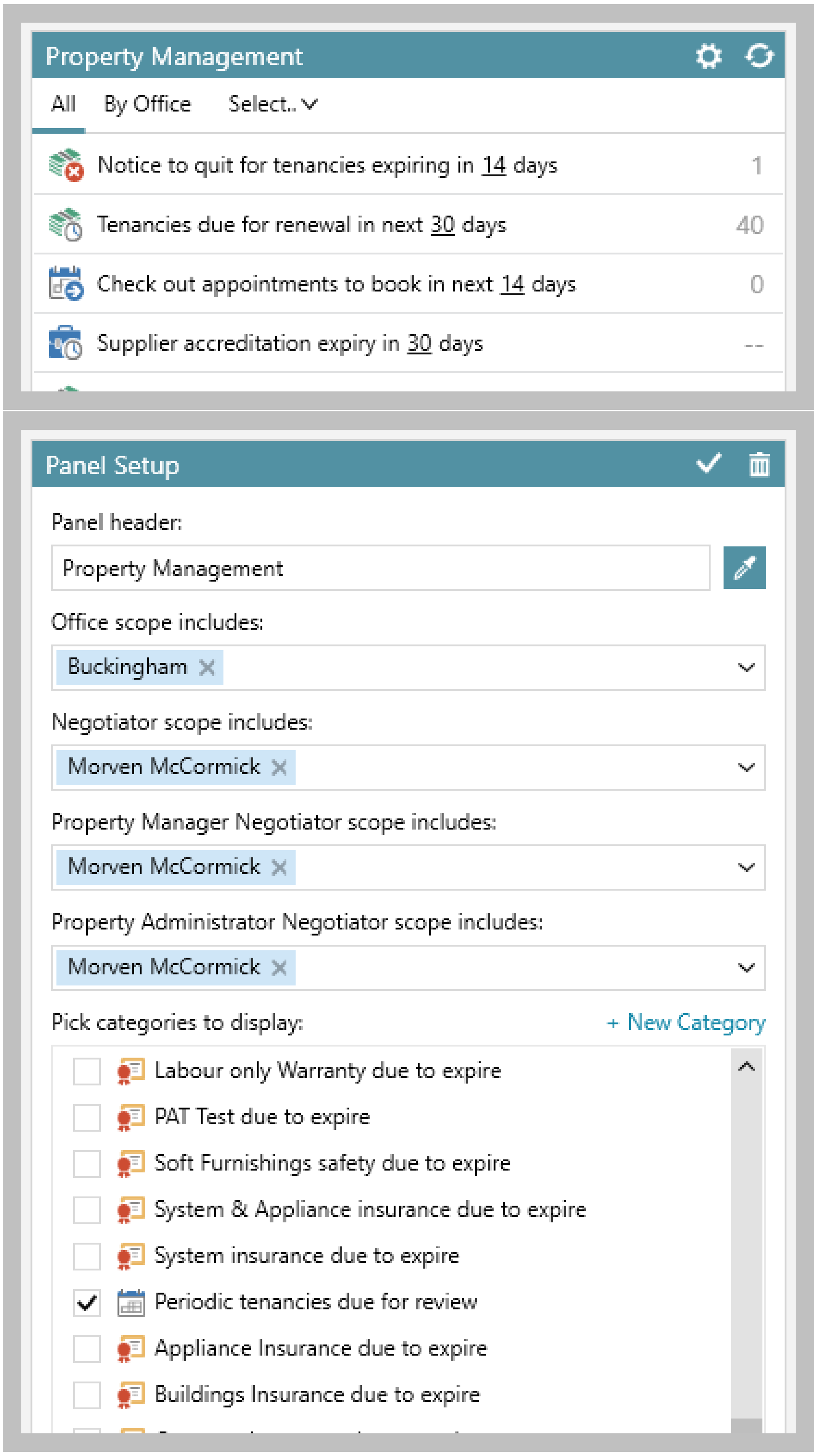
5. Add periodic tenancies due for review on Organiser

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

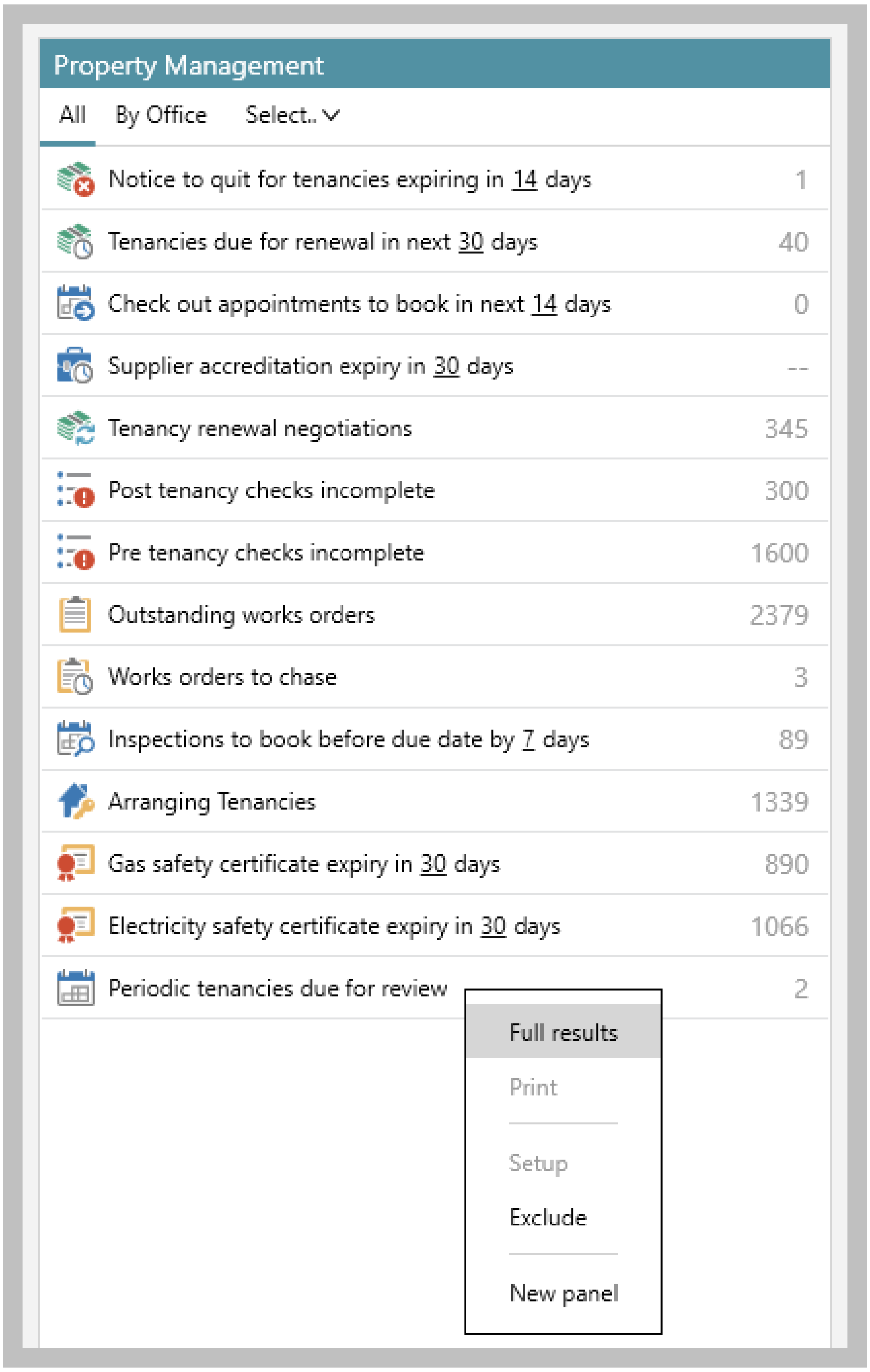
See next step



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



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

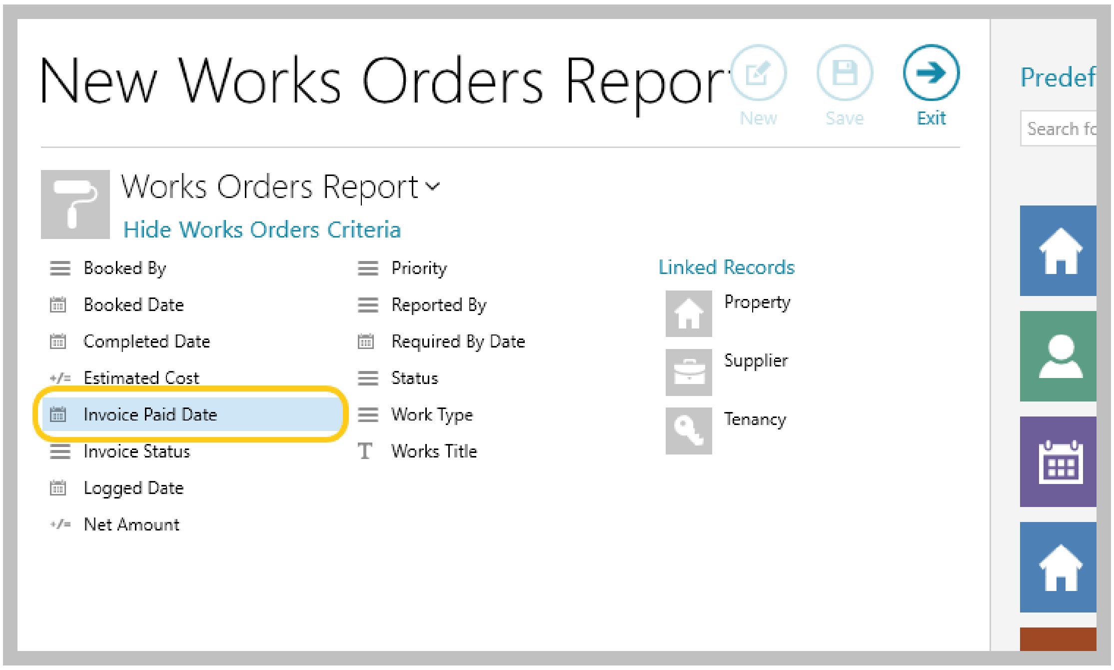
This option provides a wide range of supplier invoice related data in works order reports - allowing you to use the works order report to be more informed to manage and advise suppliers

To enable this configuration option, contact Reapit Support

1. Run works order report

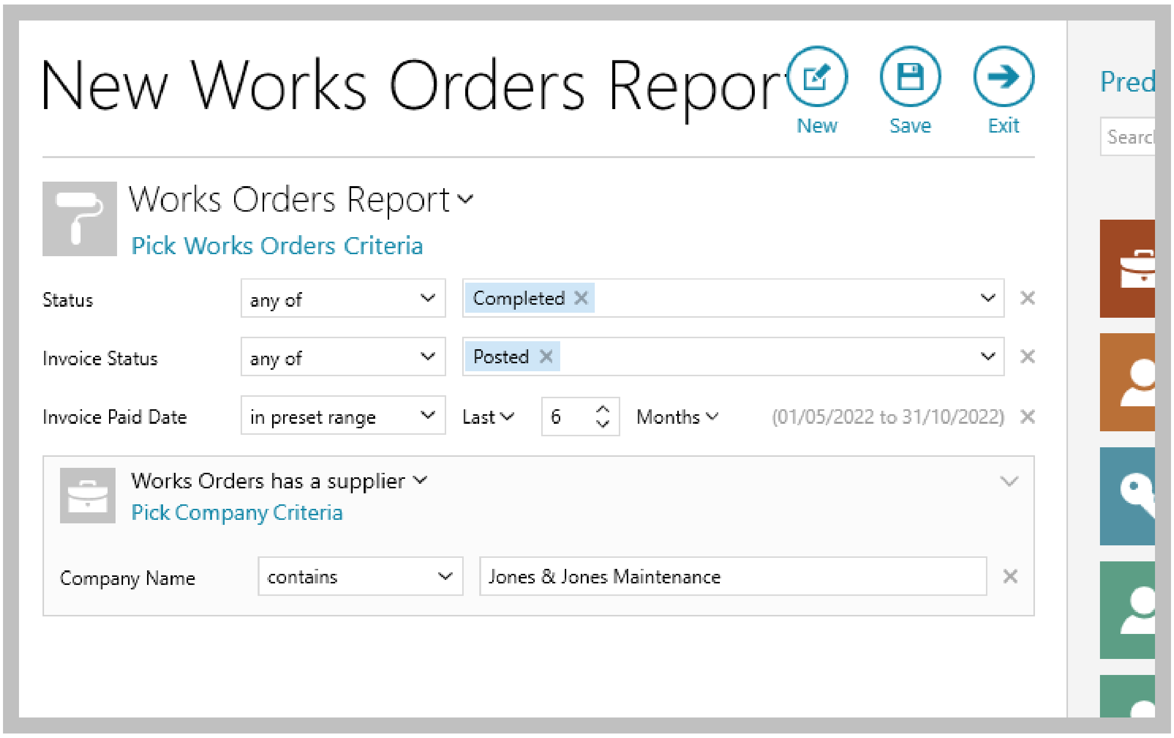
From Reports on main menu:

- Click **Power Reports**
- Select **Works Orders**
- An **Invoice Paid Date** option is available



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

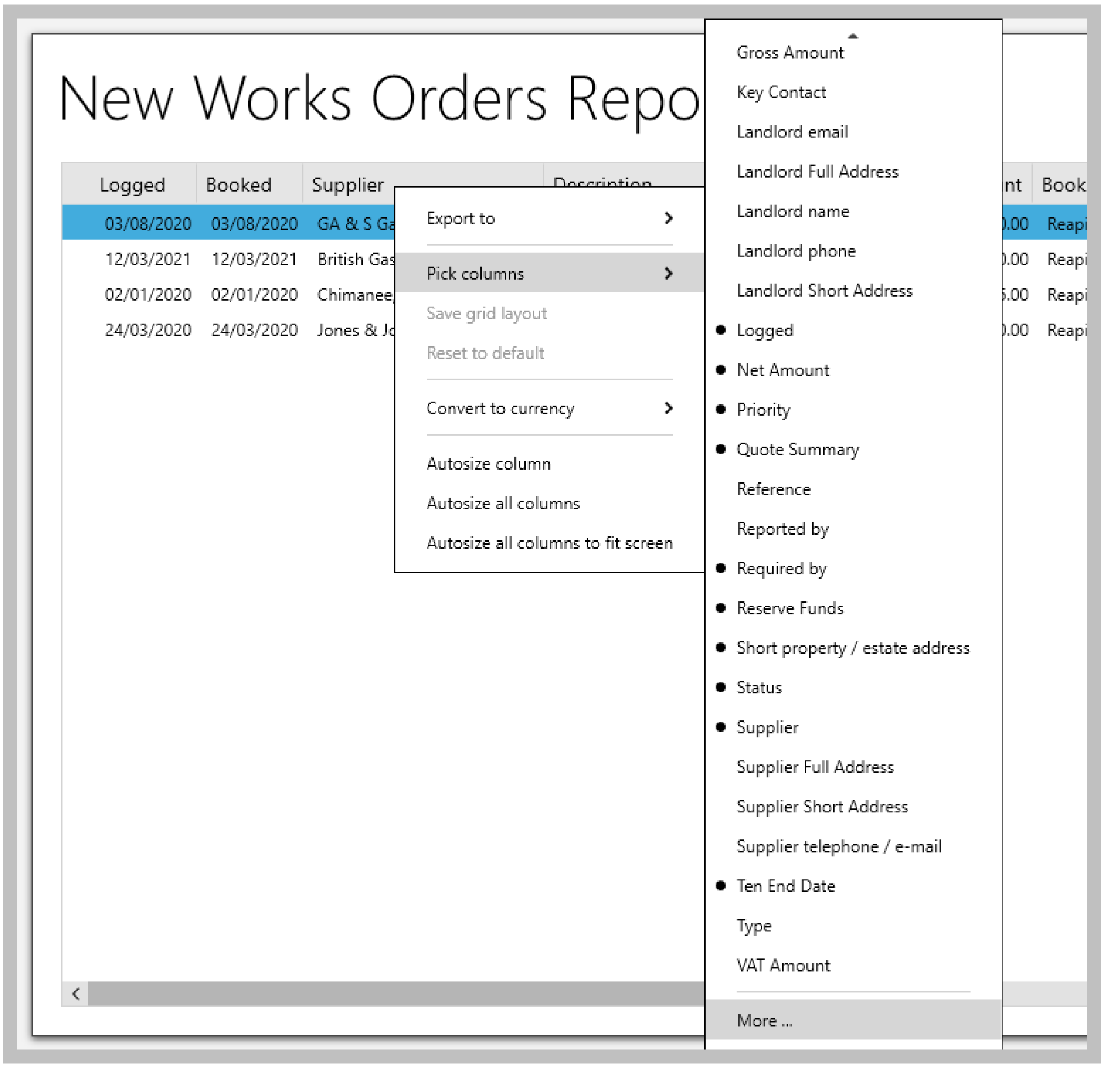


3. New grid columns

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**



- 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

When 'on hold' and/or core supplier functionality is in use and the configuration is set to prevent a user from changing either of these settings, when viewing the supplier details company screen:

- The **On hold** and/or **Core** tick boxes cannot be changed