

Reapit AgencyCloud 12.158 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

General.....	2
New UI round-up: v12.158	2
Sales & lettings/rentals	3
Supplier checklist - configuration option.....	3
Add carbon monoxide (CO) alarm/detector requirement & location.....	12
Expiry date on agreement renewal options on tenancy/renewal screens - configuration option ..	15
Tenancy alerts on tenancy arrears & reports grids	18
Link reference/guarantor to an individual tenant when arranging tenancy.....	21
Mark works orders as 'invoice not required'	26
Block Management content**	30
Period start date (not invoice raised date) used when raising invoice - configuration option (block management)	30

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 Block Management*

General

New UI round-up: v12.158

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 12.158 to bring them in line with previously redesigned screens

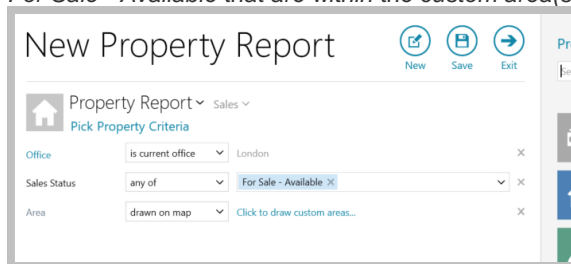
All existing functionality exists but with a refreshed look and feel

Drawing Area(s) on Map

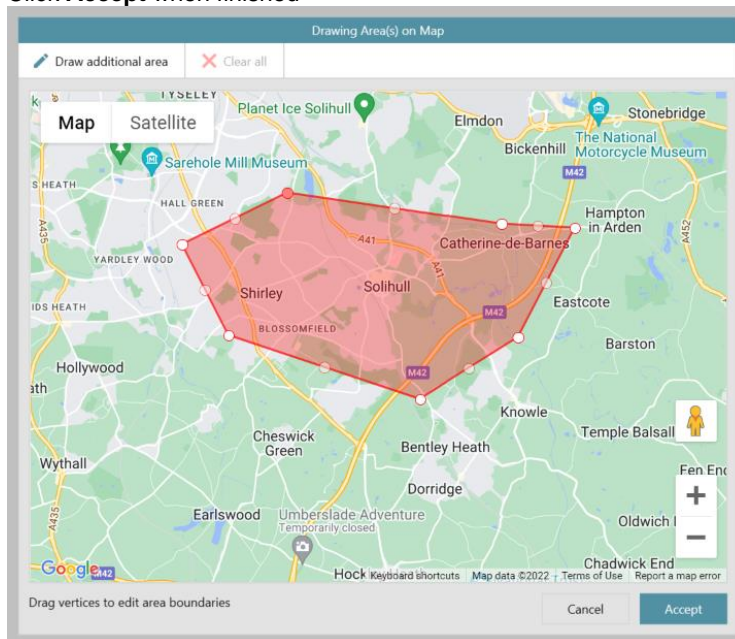
The Drawing Area(s) on Map screen, used when reporting on properties and choosing to draw area(s) on a map, now uses the new UI format

From Power Reports:

- Select **Property Report** type for sales or lettings
- Select **Area** then click the drop-down menu and select **drawn on map**
For example, this report will return just sales properties registered at the user's office that have the status For Sale - Available that are within the custom area(s) drawn on the map (see next step)



- The Drawing Area(s) on Map screen uses the new UI format
Click on map to draw required area - if more areas are required, click **Draw additional area**
Click **Accept** when finished



Once the map area is complete - to draw another area, click **Draw additional area** (top left)

Sales & lettings/rentals

Supplier 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 to provide supplier checklist functionality - the supplier checklist contains items specific to your business requirements and applies when using the supplier approval functionality and adding a new supplier - outstanding supplier checks can be flagged in the Organiser and also reported on

This functionality helps to ensure that specific processes and checks are being followed when a new supplier is added and before they are approved

To enable this configuration option, contact Reapit Support

In future releases of AgencyCloud (available early 2023), further functionality will be added to enhance supplier approval processes in conjunction with the supplier checklist

Configuration options for supplier checklists

Checklist items can be set to apply to:

- just core suppliers or just non-core suppliers, or both
For more information on core suppliers see Knowledge Base
- all offices or specific offices
- all supplier types or specific types

Users can be:

- prevented from editing or deleting a check
- required to add an attachment to a check
- prevented from marking a check as 'not needed'

Each of the above configuration settings is set for each checklist item

When contacting Reapit Support to request supplier checklist configuration, please consider which settings are required for each check

1. Access supplier checklist

When adding a new supplier, when the supplier is marked as **Unapproved**, the supplier checklist can be accessed and used

From supplier company record (legacy company screen):

- Click icon to right of **Business** type - which should be set to **Supplier (Unapproved)**

Company: Dawson Property Maintenance, London (LON22000011)

Company: Dawson Property Maintenance
Office: London
Business: **Supplier (Unapproved)** Core
Supplier: Building & Maintenance On hold
Active: ID Check
 Non-VAT registered
Flat or House Name:
No. | Address1: 1 Long Street
London
Postcode: N19 1DS United Kingdom
Telephone: b: 020 7985 1122

Staff | Supplier details
Staff
Paul Dawson - Owner - m
Description/Note

If using the new company screen

- Click icon to right of **Business** type - which should be set to **Supplier (Unapproved)**

Company: Dawson Property Maintenance, London - LON22000011

Documents

Company: Dawson Property Maintenance
Office: London
Business: **Supplier (Unapproved)**
Supplier: Building & Maintenance
 Core On hold
Active: Identity Check
 Non-VAT registered
Mobile: Add ...
E-mail: admin@dpm.co.uk
+ Add another

Flat or house name
1 Long Street
London

Staff
Paul Dawson - Owner - m: 07898 987654

Relationships
Main Office: Not set
Key Contact: Not set

Accreditations

Type	Expiry	Details
Public Liability	14/09/2023	

Payments and Terms [Transactions](#)

The new company screen (shown above) will be available to all users from AgencyCloud 12.160

2. Supplier checklist

The types of check displayed is dependent on how your business have chosen to set this up

The screenshot shows a web interface titled "Supplier Checks". At the top left, there is a "+ Add check" button. Below this is a list of four checks, each with a text input field, a status label, and icons for editing and deleting. The checks are:

- Supplier bank details added (Status: Needed, icons: notepad, paperclip)
- Supplier reference 1 (Status: Needed, icons: notepad, paperclip)
- Supplier reference 2 (Status: Needed, icons: notepad, paperclip)
- Supplier Service Level Agreement added (Status: Needed, icons: paperclip, red cross)

A dropdown menu is open for the "Supplier Service Level Agreement added" check, showing four status options:

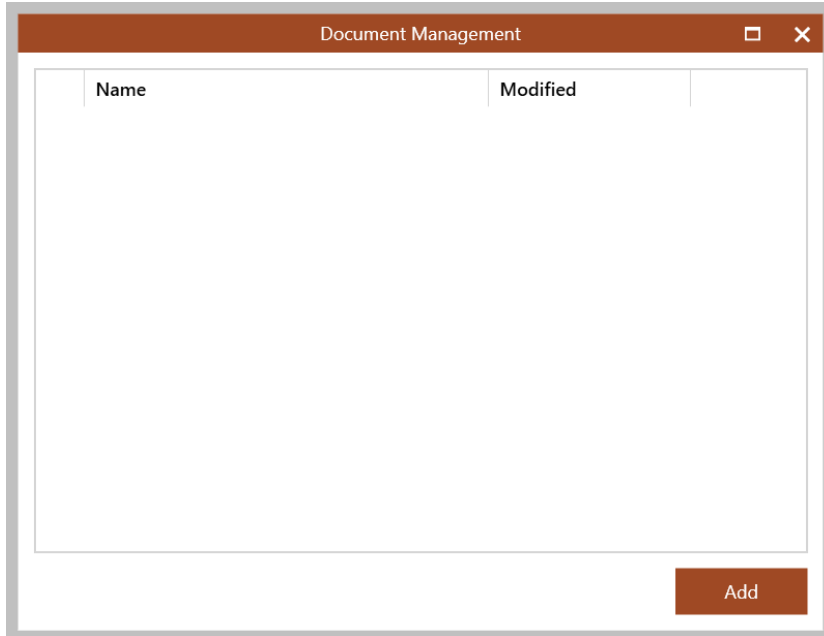
- Needed
- Not Needed
- Sent/Arranged
- Completed

- Use the link to the right of the check to update the status of it
 - Options offered are: **Needed, Not Needed, Sent/Arranged, Completed**
*Configuration may prevent a check from being marked as **Not Needed***
- If your configuration settings allow:
 - Click **Add check** to add further entries to the list
 - Click the **red cross** to the right to remove a check
 - Click into the field to **edit** the check title
- The paperclip icon beside the check allows you to attach associated documents - see **2a**
*If a yellow notepad icon is displayed beside the paperclip on a check, this check requires a document to be uploaded before it can be marked as **Completed***
- The order of the checks can be changed - see **2b**

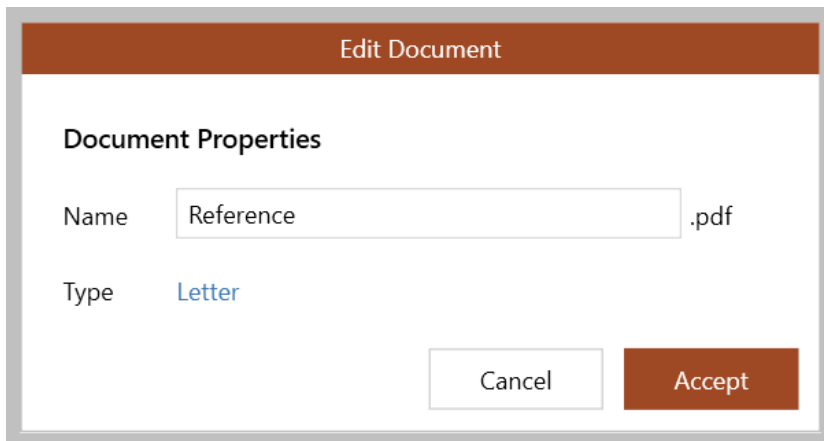
2a. Add/view check documents

Add check documents

- To the right of the check, click the paperclip icon to access Document Management



- Drag and drop your document over the above window, or click **Add** and browse to it
- When added, the **Edit Document** screen allows you to change the document **Name** and **Type**

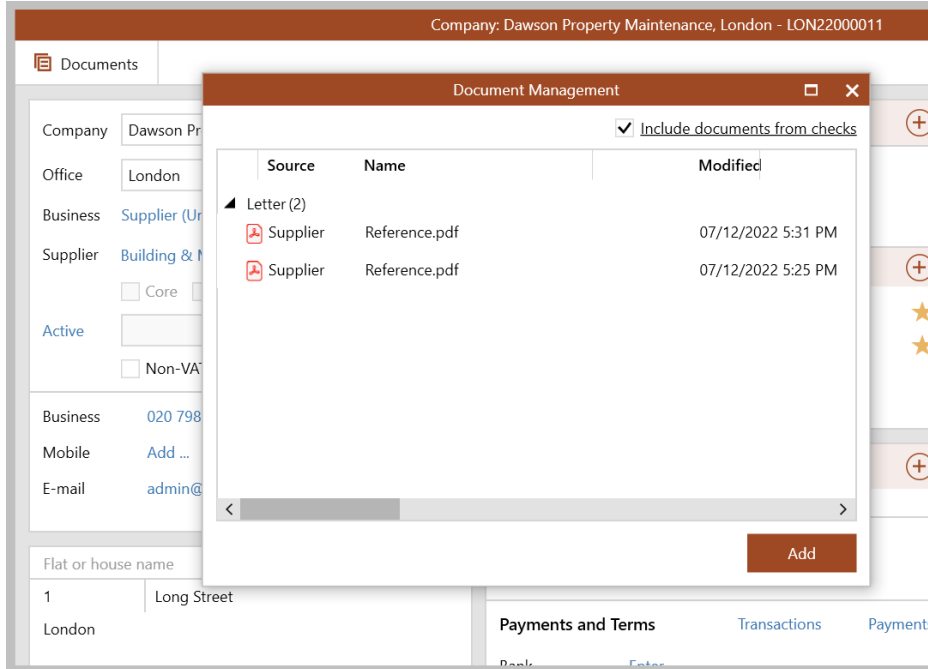


- Click **Accept**
The document is displayed in the Document Management window

View check documents

From supplier company record (when using the new company screen):

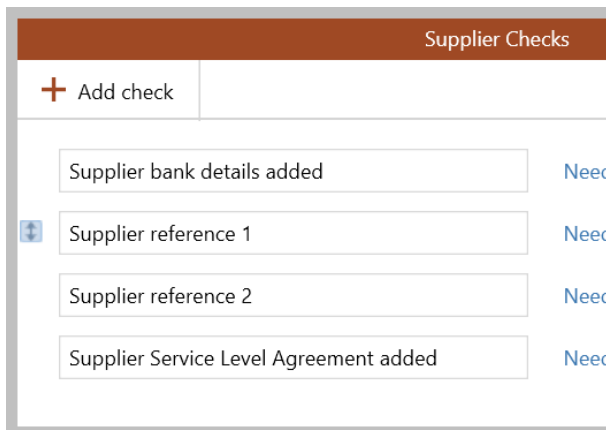
- Click **Documents** (top left) and tick **Include documents from checks**



When using the legacy company screen, documents added to checks can be viewed by accessing the checklist and clicking the paperclip icon beside the relevant check

2b. Change order of checks

- Hover mouse pointer over the check to move



- Click and drag the double-headed arrow icon on left of screen to move the check

Hover over each check title to see details of when it was updated/completed in a tooltip

3. Completed supplier checklist

When all items on the checklist are complete:

- Each item will display with a tick to the right of the check title

The screenshot shows a table titled "Supplier Checks" with a header bar. Below the header, there is a "Add check" button with a plus icon and a refresh icon. The table contains four rows, each representing a completed check item. Each row has a text input field with a checkmark icon to its right, followed by the word "Completed" in blue text, and a paperclip icon. The last row also has a red 'X' icon.

Supplier Checks		
+ Add check		↻
Supplier bank details added	✓	Completed
Supplier reference 1	✓	Completed
Supplier reference 2	✓	Completed
Supplier Service Level Agreement added	✓	Completed

- The checklist icon will change to indicate it is complete
Legacy company screen

The screenshot shows the "Legacy company screen" for "Company: Dawson Property Maintenance, London (LON22000011)". The main area contains several fields: "Company" (Dawson Property Maintenance), "Office" (London), "Business" (Supplier with a checkmark icon, and Core with an unchecked checkbox), "Supplier" (Building & Maintenance, and On hold with an unchecked checkbox), "Active" (a dropdown menu, and ID Check button), and "Non-VAT registered" (unchecked checkbox). On the right side, there is a "Staff" section with a user icon and the name "Paul".

New company screen

The screenshot shows the "New company screen" for "Company: Dawson Property Maintenance, London (LON22000011)". The main area contains several fields: "Company" (Dawson Property Maintenance), "Office" (London), "Business" (Supplier with a checkmark icon, and Core with an unchecked checkbox), "Supplier" (Building & Maintenance, and On hold with an unchecked checkbox), "Active" (a dropdown menu, and Identity Check button), and "Non-VAT registered" (unchecked checkbox). On the right side, there is a "Staff" section with the name "Paul" and a "Relation" section with "Main Of" and "Key Cor".

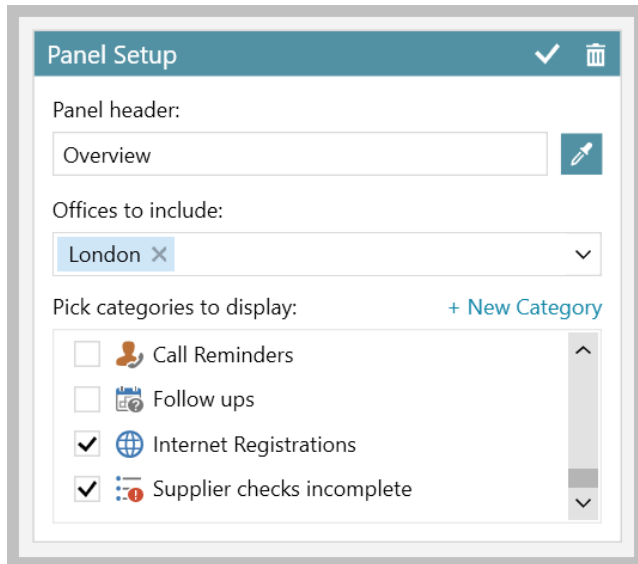
Once marked as complete, the supplier approval process should now be followed
In future releases of AgencyCloud (available early 2023), further functionality will be added to enhance supplier approval processes in conjunction with the supplier checklist

4. Incomplete supplier checks on the Organiser

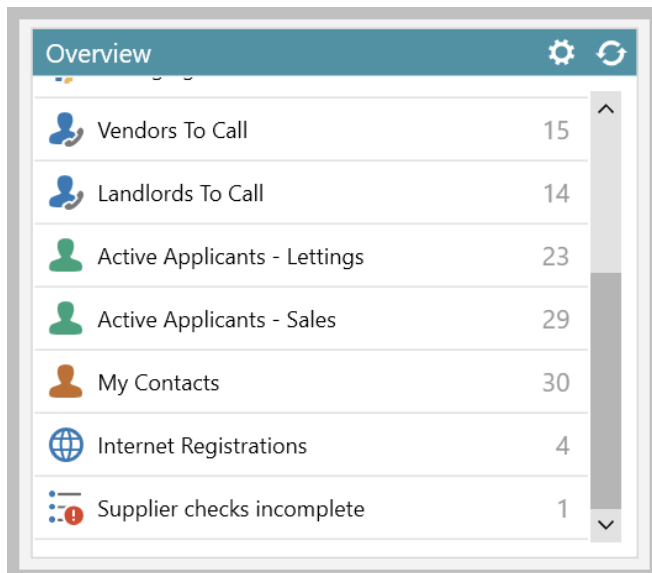
Incomplete supplier checks can be flagged on the Organiser, this needs to be added to the panel and saved first

From Organiser:

- In the **Overview** or **To-do List** panel (for example) hover over panel header and click **cog** icon
- Tick **Supplier checks incomplete**



- Click tick (top right) to save **Panel Setup**
- The **Supplier checks incomplete** option is shown in the panel
 - click entry to view the list
 - right-click and select **Full results** to see more information in a grid

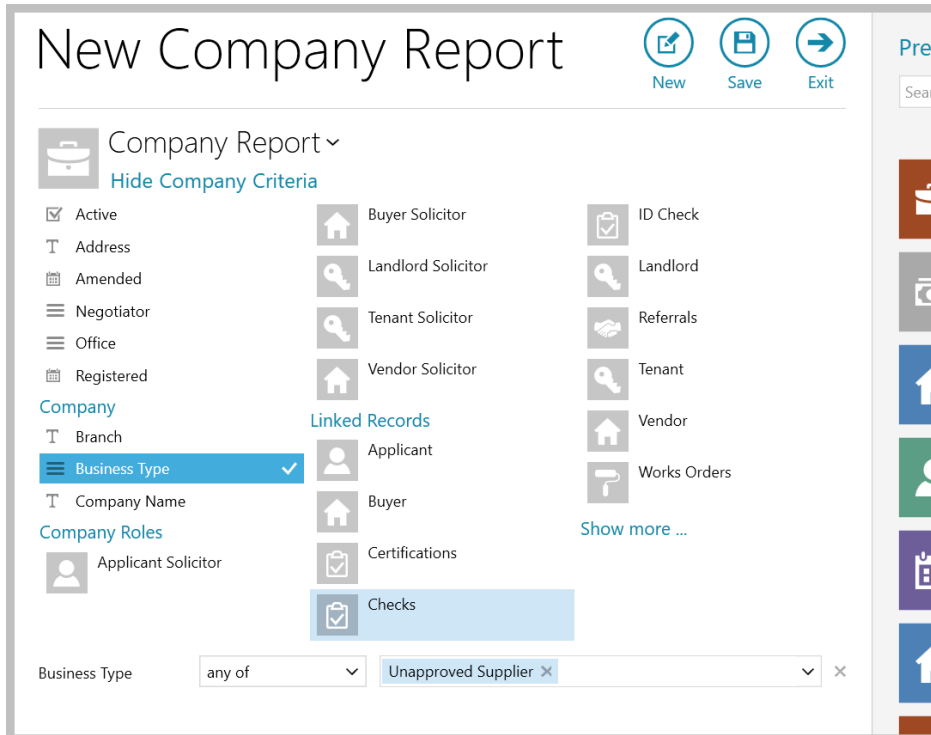


6. Report on supplier checks

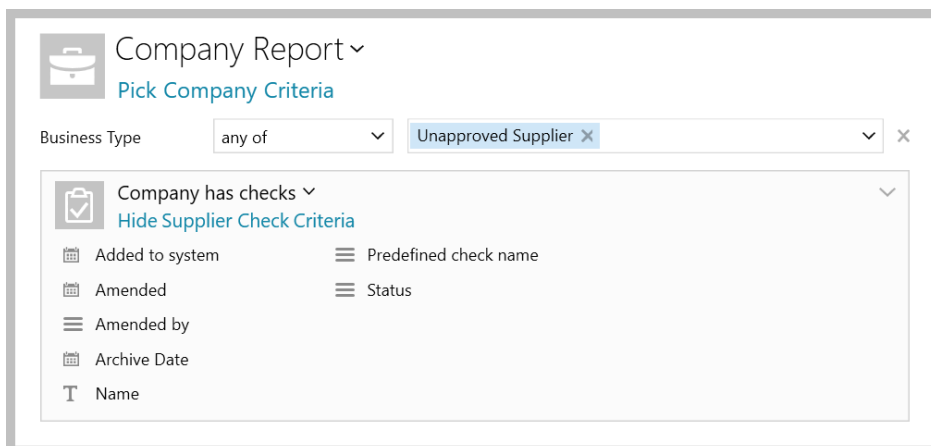
A checks option is available when running a Power Report on company records

From Reports on main menu:

- Click **Power Reports**
- Select **Company Report** type
- Click **Business Type**, leave set to **any of** and select **Unapproved Supplier**
Selecting Unapproved Supplier ensures that new suppliers whose checklist is not complete are shown
- In Linked Records, click **Checks**




- Select any checks criteria to narrow down the search results, e.g. **Status**




Example report

This report will return all company supplier records where the supplier is **Unapproved** and the **Supplier bank details added** check is currently **Needed** or **Sent/Arranged** (i.e. it is not complete)

 **Company Report** ▾
[Pick Company Criteria](#)

Business Type any of ▾ Unapproved Supplier × ▾ ×

 **Company has checks** ▾
[Pick Supplier Check Criteria](#)

Status any of ▾ Needed × Sent/Arranged × ▾ ×

Predefined check name any of ▾ Supplier bank details added × ▾ ×

Add carbon monoxide (CO) alarm/detector requirement & location

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

The appliances screen (available on a lettings property) allows you to log whether a carbon monoxide (CO) detector/alarm is required (and its location) for a selected appliance

This is in response to **The Smoke and Carbon Monoxide Alarm (Amendment) Regulations 2022** which came into force in England from 01/10/2022 - for further detail, see this information from gov.uk: [Smoke and Carbon Monoxide Alarm \(Amendment\) Regulations 2022: guidance for landlords and tenants](#)

The ability to report on which properties do/don't have appliances with CO alarms will be available in future releases of AgencyCloud (available early 2023)

1. Access appliances screen

From lettings property, Attributes panel:

- Click **edit** (pencil) icon

The screenshot displays the AgencyCloud interface for a property. The top navigation bar shows 'Quick List' and the property address 'The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9E'. Below this are tabs for 'Match', 'Journal', 'Tenancy (1)', 'Viewings and Keys', and 'Works (3)'. The main content area is divided into several sections: 'Landlord' (Mr Gerald Downey) with contact details and a 'Next call' date of 15/08/2022; 'Tenant' (Mr Steve Vai) with contact details; 'Relationships' listing office staff like Kian Kettlewell and Anna Graham; and 'Attributes' which lists property features like '1 Total Bedroom', '1 Single Bedrooms', and 'Flat'. The 'Attributes' section also includes a pencil icon for editing. Other visible sections include 'Active' (Lettings), 'Status' (To Let - Unavailable), 'Available From' (15/05/2018), 'Pre-Instruction Checks', 'Marketing', 'Rent p/m' (£3,258.93), 'Letting Fee' (8%), 'Mgmt fee' (7%), 'Rent/Fee Details', and 'Certificates' (EPC, Rooms). The bottom of the screen shows a partial description: 'Absolutley charming 1 BEDROOM garden flat,'.

- From Attributes screen, click **Appliances, Insurance & Safety** tab

Appliances

Description	Quantity	Make	Model	Serial	Bought
Freezer	1	Indesit	Turbo Cool 200	DF781924713758	04/07/2022
Fridge	1	Bosch	Super Cool 500	PO87956387987	14/03/2022
Washing Machine	1	Whirlpool	Ultra Clean 100	RE25897846513	13/12/2021
Gas boiler	1	Vaillant	ecoFIT Pure 825	UK789632541LJK	14/11/2022

Safety Checks, Certificates, Insurance & Warranties

Current Certificates Only

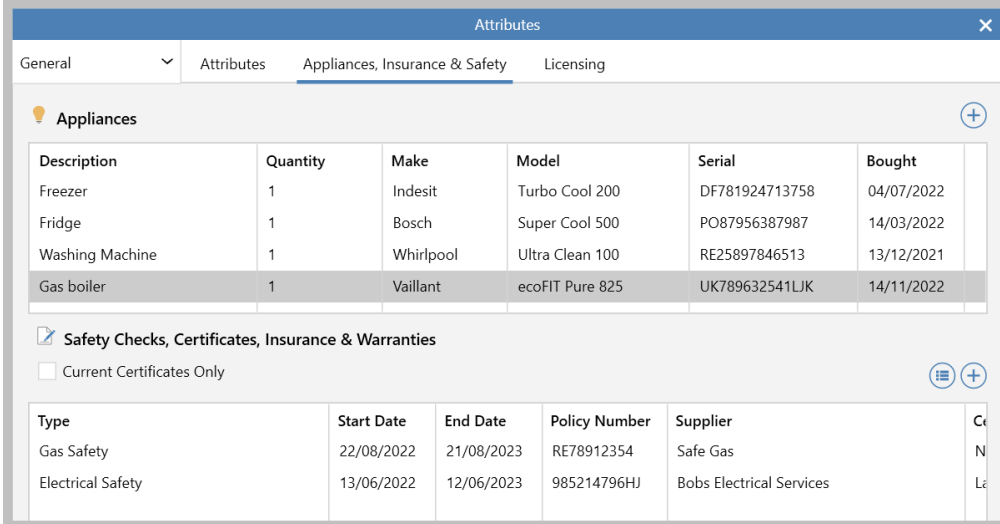
Type	Start Date	End Date	Policy Number	Supplier	Co
Gas Safety	22/08/2022	21/08/2023	RE78912354	Safe Gas	N
Electrical Safety	13/06/2022	12/06/2023	985214796HJ	Bobs Electrical Services	L

Click **Certificates** button to skip straight to **Appliances, Insurance & Safety** tab in Attributes

2. Add CO alarm requirement & location

From **Appliances** panel:

- To add a new appliance, click **+** (top right) or double-click an existing one to edit it

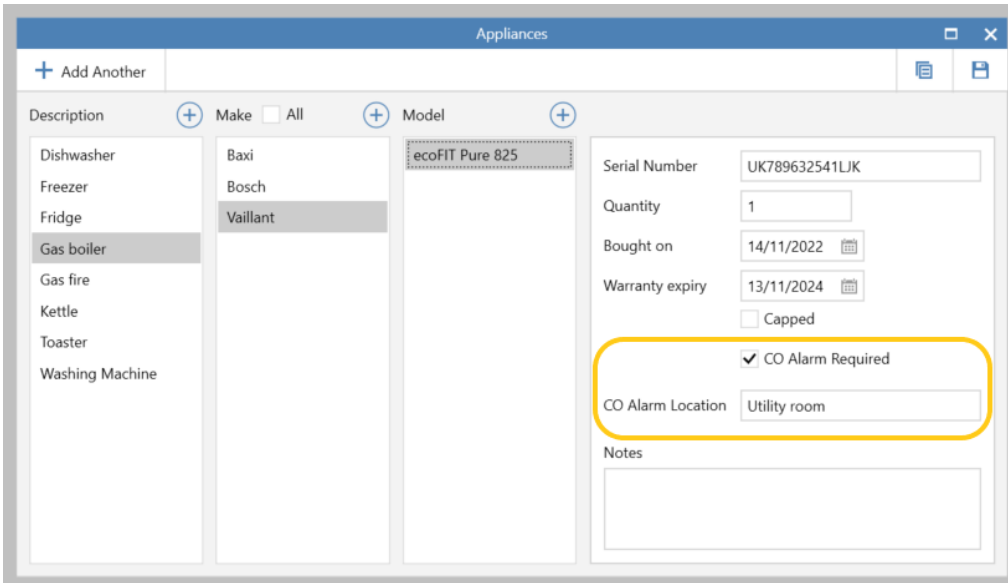


Description	Quantity	Make	Model	Serial	Bought
Freezer	1	Indesit	Turbo Cool 200	DF781924713758	04/07/2022
Fridge	1	Bosch	Super Cool 500	PO87956387987	14/03/2022
Washing Machine	1	Whirlpool	Ultra Clean 100	RE25897846513	13/12/2021
Gas boiler	1	Vaillant	ecoFIT Pure 825	UK789632541LJK	14/11/2022

Type	Start Date	End Date	Policy Number	Supplier	Ce
Gas Safety	22/08/2022	21/08/2023	RE78912354	Safe Gas	N
Electrical Safety	13/06/2022	12/06/2023	985214796HJ	Bobs Electrical Services	Le

- With the correct appliance selected:
 - Tick **CO Alarm Required**
 - Enter **CO Alarm Location**

When **CO Alarm Required** is ticked, a location must be entered in order to save the appliance



Appliances

+ Add Another

Description: Gas boiler (selected)

Make: Vaillant

Model: ecoFIT Pure 825

Serial Number: UK789632541LJK

Quantity: 1

Bought on: 14/11/2022

Warranty expiry: 13/11/2024

CO Alarm Required

CO Alarm Location: Utility room

Notes:

- Click **Save** (top right)

For more information on using the appliances screen, see Knowledge Base

Expiry date on agreement renewal options on tenancy/renewal screens - 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 an expiry date to be set on selected agreement renewal options (agreement renewal options can be set via the tenancy and renewal negotiation screens)

When viewing tenancy/renewal information in a grid and/or reporting on tenancies/renewals, an agreement renewal expiry column can be shown in the grid/report results

Merge codes have also been added to the Letter Template Editor to allow the agreement renewal expiry date to be pulled into letters and emails

To request that expiry date(s) are added to specific agreement renewal options, contact Reapit Support

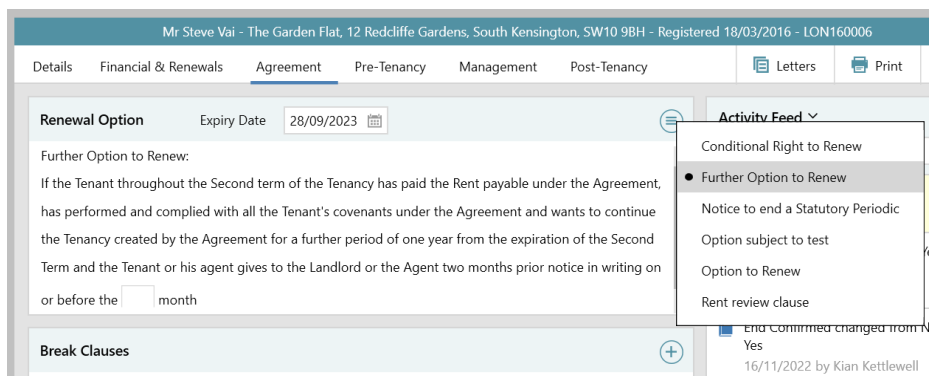
1. Add renewal option & set expiry date

Agreement renewal options can be set via the tenancy and/or the renewal negotiation screens

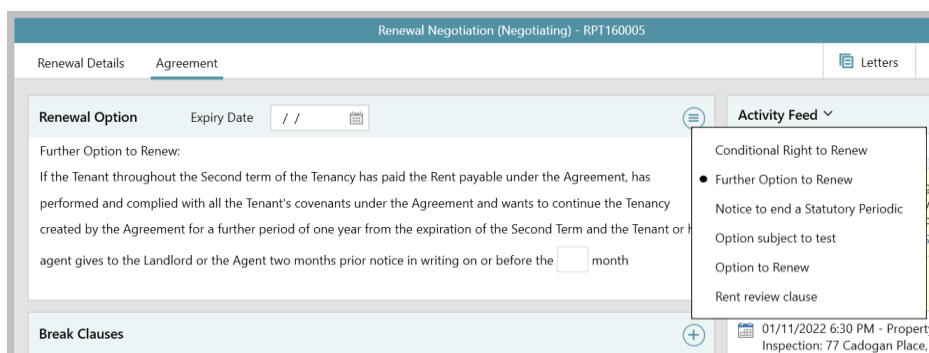
From tenancy/renewal negotiation:

- Click **Agreement** tab
- In **Renewal Option** panel, click options button to right
- When an option is selected that has been configured with an expiry date, the **Expiry Date** field will display at the top

Tenancy screen



Renewal negotiation screen

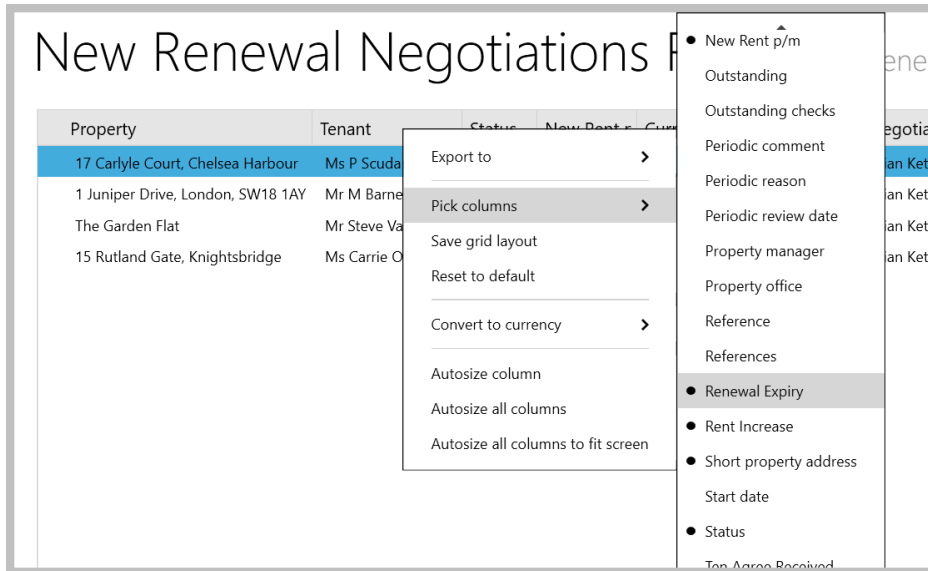


2. Viewing expiry date in tenancy/renewal negotiation reports & grids

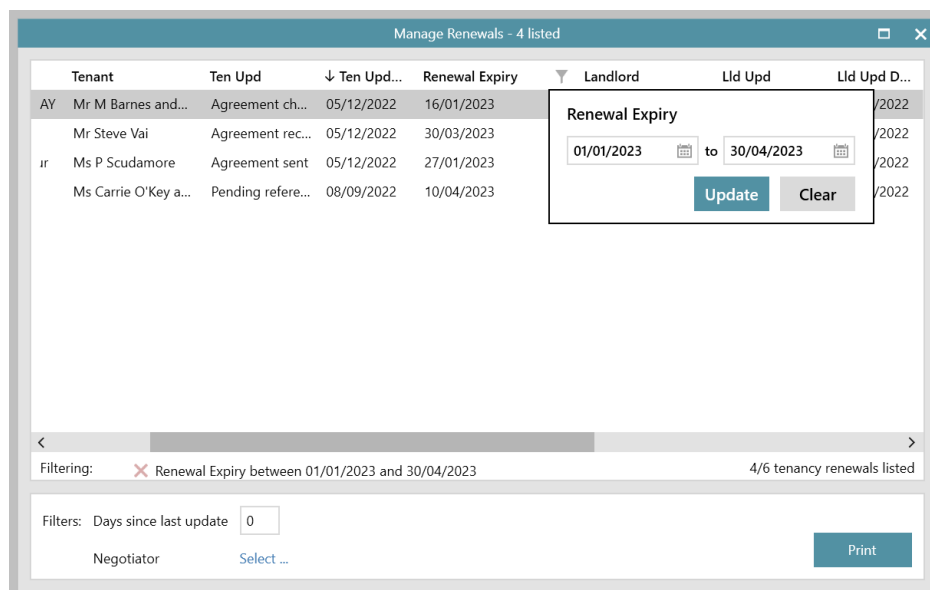
After running a tenancy or renewal negotiation report or viewing a tenancy or renewal report grid, the agreement expiry date can be added and saved on both tenancy and renewal negotiation grids

From tenancy/renewal negotiation grid:

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



- The new column is 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**
- The column will show when using this type of grid again - grid functions can be used to sort or filter by date
 - To sort the list, click the column heading
 - To filter the list, click to the right of the column heading (to view filter icon, shown below), enter the dates to filter by and click **Update**



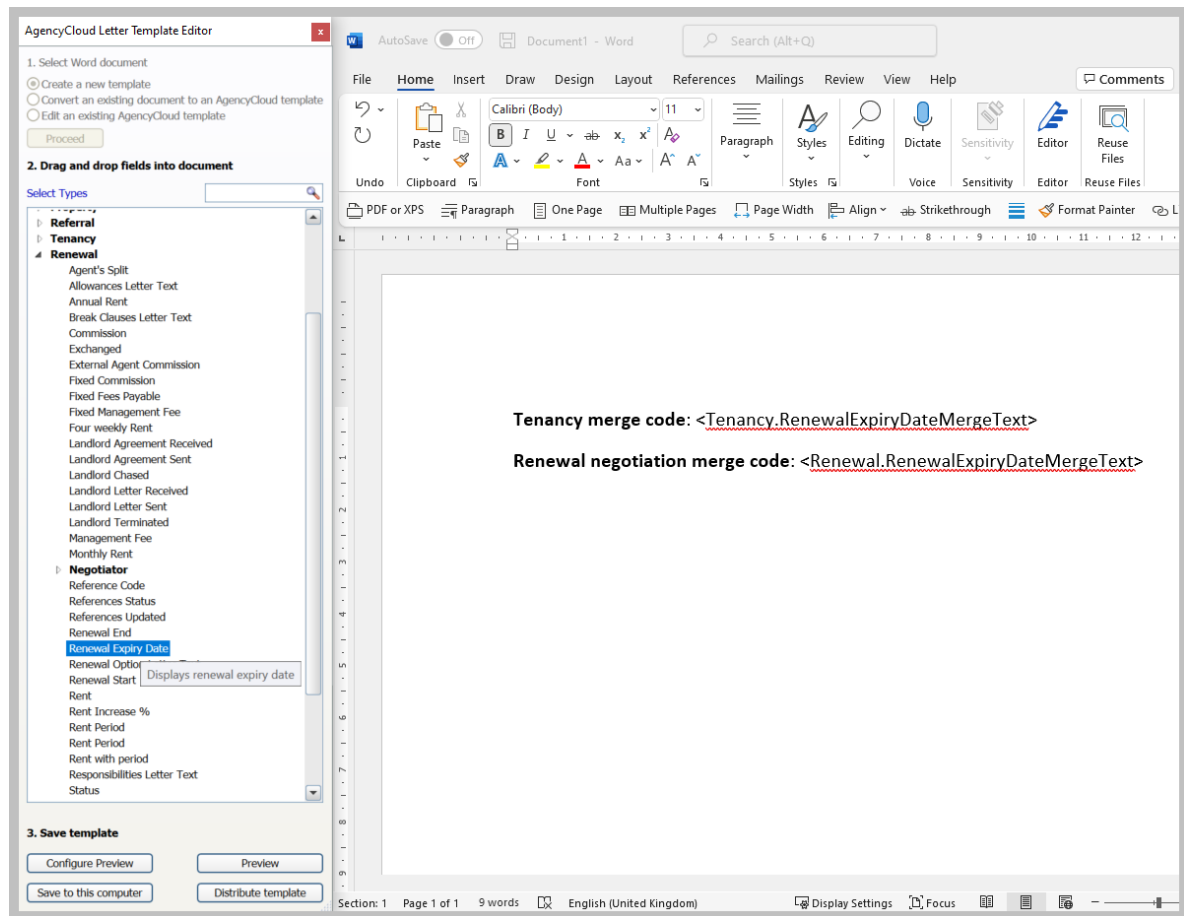
The example shown above is a renewals grid - seen when accessing renewals via the Organiser

3. Merge fields for use in letters & emails

A merge field has been added to the Letter Template Editor (LTE) for use in letters and email templates

From LTE:

- For tenancy merge code, expand **Tenancy**, locate **Renewal Expiry Date** field, then click and drag field to Word document **<Tenancy.RenewalExpiryDateMergeText>**
- For renewal negotiation code, expand **Renewal**, locate **Renewal Expiry Date** field, then click and drag field to Word document **<Renewal.RenewalExpiryDateMergeText>**
- The merge codes can be used in a letter or copied and pasted into an email template



For more information on using the Letter Template Editor, see Knowledge Base

Tenancy alerts on tenancy arrears & reports grids

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

Tenancy alerts can be seen when viewing tenancies in arrears and running tenancy reports

For information on adding a tenancy alert, see Knowledge Base

1. Display the tenancy alert column

The Tenancy Alert column needs to be added & saved to the arrears and/or the tenancy reports grid

Tenant Arrears

From main menu, click **Lettings/Rentals** and select **Chase Arrears**:

- Ensure grid is set to show **Tenants** arrears (top right)
- Right-click over the column headings, select **Pick columns** and click **Tenancy Alert**

Arrears - 9 Tenants

Filters Older than days Amounts over All Arrears Tenants Landlords

✓	Tenant	Outstanding	Full Amount	From	Days	Items	Has Guarantor	Last Letter
✓	Mr K Alonso	-£153.33	-£8,820.00	31/01/2017	2135	1	No	
✓	Mr Adam Arms	£7,496.67	£7,496.67	18/03/2022	263	1	No	23/11/2016
✓	Mr M Barnes	£18,604.00	£18,604.00	06/09/2019	1187	7	No	
✓	Mrs H Harbing	£14,466.67	£14,466.67	25/02/2021	649	2	No	
✓	Mr James Hetf	850.00	850.00	19/05/2016	2392	1	No	23/11/2016
✓	Mr Noah Jones	200.00	200.00	25/02/2021	649	2	No	
✓	Mr James Mad	0.00	0.00	23/01/2016	2509	12	No	
✓	Ms P Scudamo	773.36	773.36	12/03/2019	1365	8	No	
✓	Mr Steve Vai	250.00	250.00	15/05/2016	2396	11	No	

Summary Table:

Date	Description	Full Amount
16/03/2016	Tenancy Receipt Ref: Alonso rent pay	£9,000.00
31/01/2017	Addendum for new dog	£180.00

Print Exit

Power Report

After running a tenancy Power Report, from the results grid:

- Right-click over the column headings, select **Pick columns** and click **Tenancy Alert**

The screenshot displays a 'New Tenancy Report' for 6 tenancies. The table has columns for Property, Client Accounts Assistant, and Tenant. A context menu is open over the 'Client Accounts Assistant' column header, with 'Pick columns' selected. The 'Pick columns' sub-menu is also open, showing 'Tenancy Alert' as the selected option.

Property	Client Accounts Assistant	Tenant
1 Juniper Drive, London, SW18 1AY	Anna Gra	
The Garden Flat	Anna Gra	
Flat 36, 13 Earls Court Square	Anna Gra	
76 Sloane Court East, London	Anna Gra	
17 Old Church Street, Chelsea	Simon Cr	
15 Rutland Gate, Knightsbridge	Simon Cr	

Management Fee
Manager code
● Manager name
Notice received
Periodic comment
Periodic reason
Periodic review date
Property manager
Property office
Reference
● Renewal Expiry
● Rent p/m
Role
● Short property address
Start date
● Status
● Tenancy Alert
● Tenant
Tenant full address
Tenant phone
Tenant short address
Type
More ...

2. Save new column and use grid features to sort/filter

After adding the Tenancy Alert column:

- The new column is 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**
- The column will now show when using this type of grid again - grid functions can be used to sort or filter by content
 - To sort the list, click the column heading
 - To filter the list by content, click to the right of the column heading (to view filter icon, shown below)

Tenant Arrears

Arrears - 9 Tenants

Filters Older than days Amounts over All Arrears Tenants Landlords

<input checked="" type="checkbox"/>	Tenant	Tenancy Alert	Property	Outstanding	Full Amount	From	Days	Items
<input checked="" type="checkbox"/>	Mr K Alonso		17 Old Church Street, Chelsea	-£153.33	-£8,820.00	31/01/2017	2135	1
<input checked="" type="checkbox"/>	Mr Adam Armstrong		Flat 8, 17 Hasker Street, Chels	£7,496.67	£7,496.67	18/03/2022	263	1
<input checked="" type="checkbox"/>	Mr M Barnes and Mr O Smith	Mr Barnes is currently in hos	1 Juniper Drive, London, SW11	£18,604.00	£18,604.00	06/09/2019	1187	7
<input checked="" type="checkbox"/>	Mrs H Harbinger		7 Cadogan Square, Knightsbri	£14,466.67	£14,466.67	25/02/2021	649	2
<input checked="" type="checkbox"/>	Mr James Hetfield	Contact with tenant by emai	12 Thames Quay, Chelsea Har	£5,850.00	£5,850.00	19/05/2016	2392	1
<input checked="" type="checkbox"/>	Mr Noah Jones		72 Redcliffe Square, London.,	£11,200.00	£11,200.00	25/02/2021	649	2
<input checked="" type="checkbox"/>	Mr James Maddison		77 Cadogan Place, London, SV	£45,506.04	£182,000.04	23/01/2016	2509	12
<input checked="" type="checkbox"/>	Ms P Scudamore		17 Carlyle Court, Chelsea Hart	£27,174.03	£28,773.36	12/03/2019	1365	8
<input checked="" type="checkbox"/>	Mr Steve Vai		The Garden Flat, 12 Redcliffe	£24,250.00	£24,250.00	15/05/2016	2396	11

Date	Description	Outstanding	Full Amount
16/03/2016	Tenancy Receipt Ref: Alonso rent payment	-£333.33	£9,000.00
31/01/2017	Addendum for new dog	£180.00	£180.00

Show notes

Print Exit

Power Report

New Tenancy Report 6 Tenancies

Property	Tenant	Tenancy Alert	Status
1 Juniper Drive, London, SW18 1AY	Mr M Barnes and Mr O Smith	Mr Barnes is currently in hospital - speak to Ms Ba	Tenancy Curr
The Garden Flat	Mr Steve Vai		Tenancy Curr
Flat 36, 13 Earls Court Square	Mr T Bayliss	Tenant overseas until 05/02/2023	Tenancy Curr
76 Sloane Court East, London	Mr S Davies		Tenancy Curr
17 Old Church Street, Chelsea	Mr K Alonso		Tenancy Curr
15 Rutland Gate, Knightsbridge	Ms Carrie O'Key and Mr Toby LeRone		Tenancy Curr

Link reference/guarantor to an individual tenant when arranging tenancy

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

When a tenancy has multiple references/guarantors, such as in the case of shared accommodation or a student let, references and/or guarantors can be linked to an individual tenant at arranging tenancy stage
Prior to this update, there was no facility at arranging tenancy stage to do this, references/guarantors would be assumed as being for the lead applicant

For more information on adding a reference/guarantor, see Knowledge Base

1. Add reference and/or guarantor

At arranging a tenancy stage, tenant details are held on an applicant record, therefore the applicant screen is used to create the links to the references/guarantors
In this example, the tenancy will have three tenants

From applicant, **Relationships** panel:

- Click **+** and select **References / Guarantors**

The screenshot shows the applicant record for Mr T Bayliss. The Relationships panel is open, and the dropdown menu is set to 'References / Guarantors'. The interface includes a top navigation bar with 'Quick List' and 'Mr T Bayliss - Reg'. Below this are tabs for 'Match', 'Journal', 'Tenancy (2)', and 'Viewing'. The main content area is divided into several sections: 'Individual' (selected) with a '(2)' indicator, 'Identity Check', 'Marketing Consent', 'Mobile' (07700 900798), 'Home' (Add ...), 'E-mail' (bayliss@bayliss.com), 'Address' (911A Fulham Rd, Fulham, London, SW6 5HU), 'Extra Applicants' (Mrs Gina Bellman, Miss Amelia Wright), and 'Relationships' (Main Office: London, Key Contact: Kian Kettlewell). A right-hand panel shows 'Active' (09/01/2023), 'Status' (General), 'Source' (Reapit Website), 'Next call' (15/12/2022), 'Archive in' (2 weeks), and 'Requirements' (Rent: £6,518 to £13,036; 2+ Total Bedrooms; Flat; Area: Group South West London). A dropdown menu is open over the Relationships panel, listing options: 'Create Relationship', 'Office', 'Negotiator', 'Relocation / Introducing Agent', and 'References / Guarantors' (highlighted).

- In **References** or **Guarantors** panel, double-click **Add**

References/Guarantors

Mr T Bayliss (2)

Identity Check Marketing Consent

Flat or house name

911A Fulham Rd

Fulham

London

SW6 5HU United Kingdom

Address type Home Address

Mobile 07700 900798

Home Add ...

E-mail bayliss@bayliss.com

+ Add another

Bank A/C Enter ...

References Reference Check

Add ...

Guarantors

Add ...

- The **Search contacts** screen is displayed - search for the required contact
*If not found, click **Add** to add a new contact record*
- The Reference/Guarantor screen is displayed with the selected contact details added
 - For a reference, see next step
 - For a guarantor, see step 3

2. Create link to tenant on reference


From Reference:

- Click **Linked contact**




The tenant names from the applicant record are displayed

- Select the tenant name who the reference is for

Reference


Individual Company 



Mr | S | Cromwell

 Identity Check  Marketing Consent 


Flat or house name


12 | Elthron Rd
Fulham

SW6 4BN | United Kingdom 

Mobile 07700 900089  

Home Add ...

E-mail cromwell@cromwell.com 

[+ Add another](#) 

Reference type [Character Reference](#)

Status [Apply for reference ...](#)

Linked Contact [Select ...](#)

Mrs Gina Bellman

Mr T Bayliss

Miss Amelia Wright

[Save](#)

3. Create link to tenant on guarantor

From Guarantor:

- Click **Linked contact**

The tenant names from the applicant record are displayed

- Select the tenant name who the guarantor is for

The screenshot shows a web form titled "Guarantor" with a close button (X) in the top right corner. The form is divided into several sections:

- Individual/Company Selection:** Two radio buttons are present: "Individual" (selected) and "Company".
- Name:** A text field contains "Mr Connor Wright".
- Identity Check:** A status indicator shows a question mark icon and the text "Identity Check".
- Marketing Consent:** A status indicator shows a checkmark icon and the text "Marketing Consent" with a dropdown arrow.
- Address:** A section titled "Flat or house name" contains a text field with "3 Peterborough Road" and "Parsons Green" below it.
- Postcode:** A text field contains "United Kingdom" with a dropdown arrow.
- Contact Information:** A section with a vertical scrollbar on the right contains:
 - Mobile: 07064672921 (with a mobile phone icon)
 - Home: Add ... (with a plus icon)
 - E-mail: cWright@hotmail.com (with an envelope icon)
 - + Add another (with a plus icon)
- Status:** A section with two rows:
 - Status: Applied For
 - Linked Contact: Miss Amelia Wright

A dropdown menu is open over the "Linked Contact" field, displaying three options: "Mrs Gina Bellman", "Mr T Bayliss", and "Miss Amelia Wright". The "Miss Amelia Wright" option is highlighted. In the bottom right corner, there is a green "Save" button and a partially visible "Conve" button with a question mark icon.

3. Reference/guarantor linked to tenant

The References/Guarantors screen shows details of the references and guarantors added with the linked tenant name shown in brackets

- In this example, all three tenants have individual reference details entered and one tenant has a guarantor

The screenshot shows a window titled "References/Guarantors" with a close button (X) in the top right corner. The window is divided into several sections:

- Header:** Mr T Bayliss (2)
- Identity Check:** ? Identity Check
- Marketing Consent:** ? Marketing Consent (dropdown arrow)
- Address:** Flat or house name: 911A Fulham Rd, Fulham, London. SW6 5HU, United Kingdom (dropdown arrow). Address type: Home Address.
- Contact Information:** Mobile: 07700 900798 (mobile icon), Home: Add ..., E-mail: bayliss@bayliss.com (email icon). + Add another.
- Bank A/C:** Enter ...
- References:** Reference Check (link). List: Mr S Cromwell (Mrs Gina Bellman), Miss Victoria King (Mr T Bayliss), Mr Gerald Downey (Miss Amelia Wright), Add ...
- Guarantors:** List: Mr Connor Wright (Miss Amelia Wright), Add ...

The **Relationships** panel on the applicant record also shows these details

- Click the Reference/Guarantor link/icon for a shortcut to the References/Guarantors screen (shown above)

The screenshot shows a panel titled "Relationships" with a plus icon (+) in the top right corner. The panel contains a list of relationships:

Relationship Type	Details	Icon
Main Office	London	★
Key Contact	Kian Kettlewell	★
Reference	Miss Victoria King (Mr T Bayliss)	☑
Reference	Mr Gerald Downey (Miss Amelia Wrig...)	☑
Reference	Mr S Cromwell (Mrs Gina Bellman)	☑
Guarantor	Mr Connor Wright (Miss Amelia Wrig...)	📁

Mark works orders as 'invoice not required'

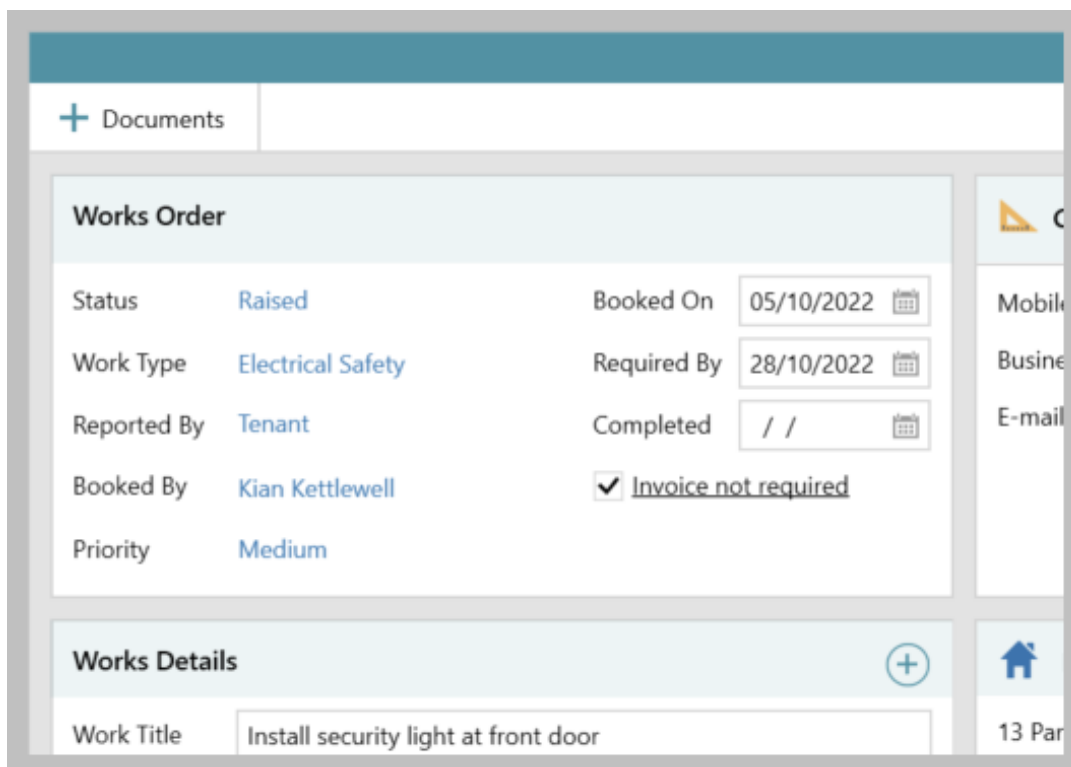
This guide has been reviewed against our global client base and classed as relevant to all regions

A works order that does not require an invoice can be identified - works order grids can display whether an invoice is required, plus reporting options are available

1. Identify works orders that do not require an invoice

From works order:

- Tick **Invoice not required**
*This action removes the ability to **Post invoice to accounts***



The screenshot shows a software interface for a works order. At the top left, there is a '+ Documents' button. Below it is a 'Works Order' section with the following fields:

Status	Raised	Booked On	05/10/2022
Work Type	Electrical Safety	Required By	28/10/2022
Reported By	Tenant	Completed	/ /
Booked By	Kian Kettlewell	<input checked="" type="checkbox"/> Invoice not required	
Priority	Medium		

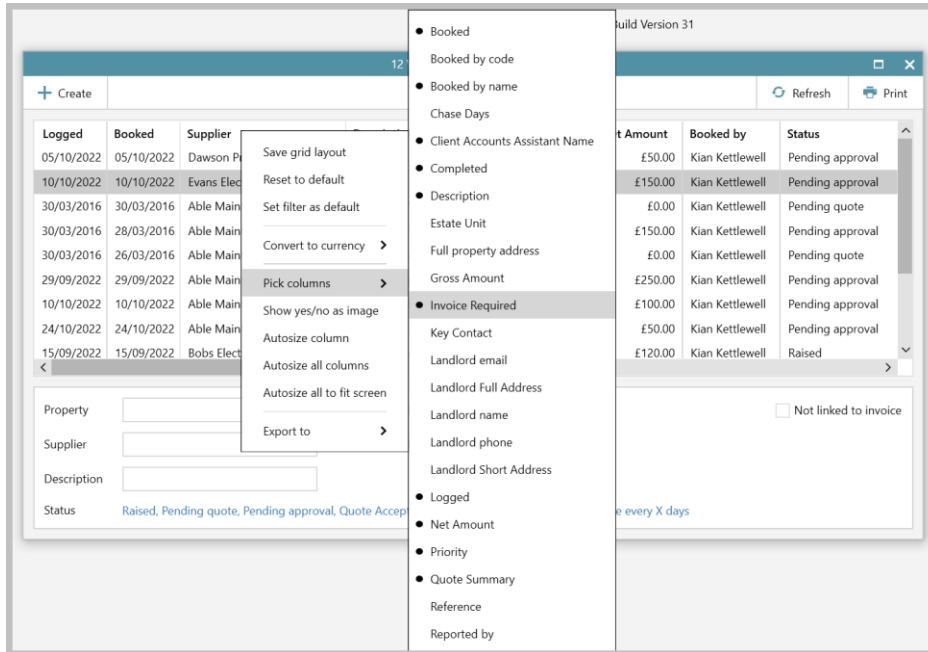
Below the 'Works Order' section is a 'Works Details' section with a '+' icon. The 'Work Title' field contains the text 'Install security light at front door'. On the right side of the interface, there are navigation icons for a home page and a list of 13 items.

2. View works orders that do/do not require an invoice in works order grids

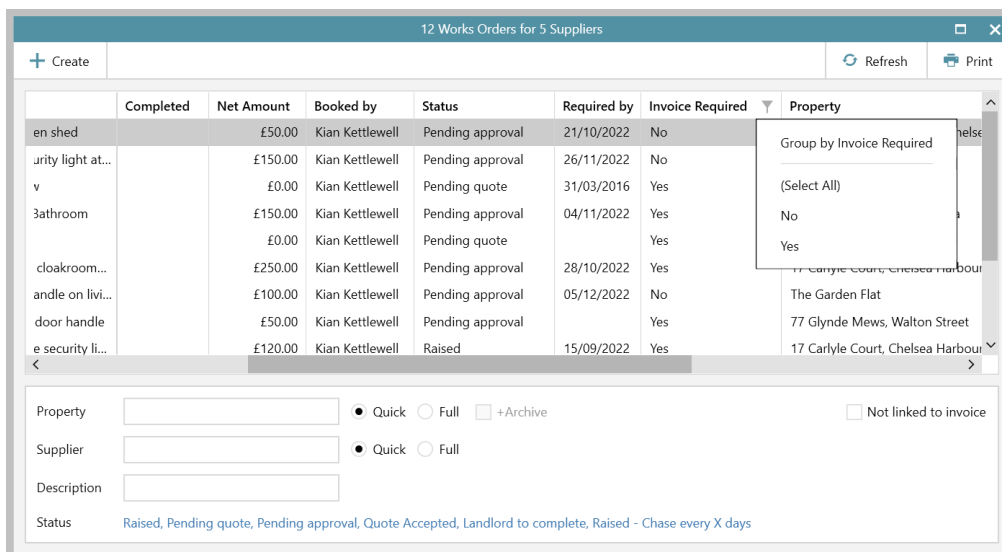
After running a works order report or viewing a works order grid, an **Invoice Required** column can be added and saved

From a works order grid:

- Right-click over the column headings, select **Pick columns** and click **Invoice Required**



- The new column is 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**
- The **Invoice Required** column will show when using this type of grid again - grid functions can be used to sort, filter or group
 - To sort the list, click the column heading
 - To filter or group the list, click to the right of the column heading (to view filter icon, shown below) and choose to **Group by Invoice Required** or filter by **Yes/No**

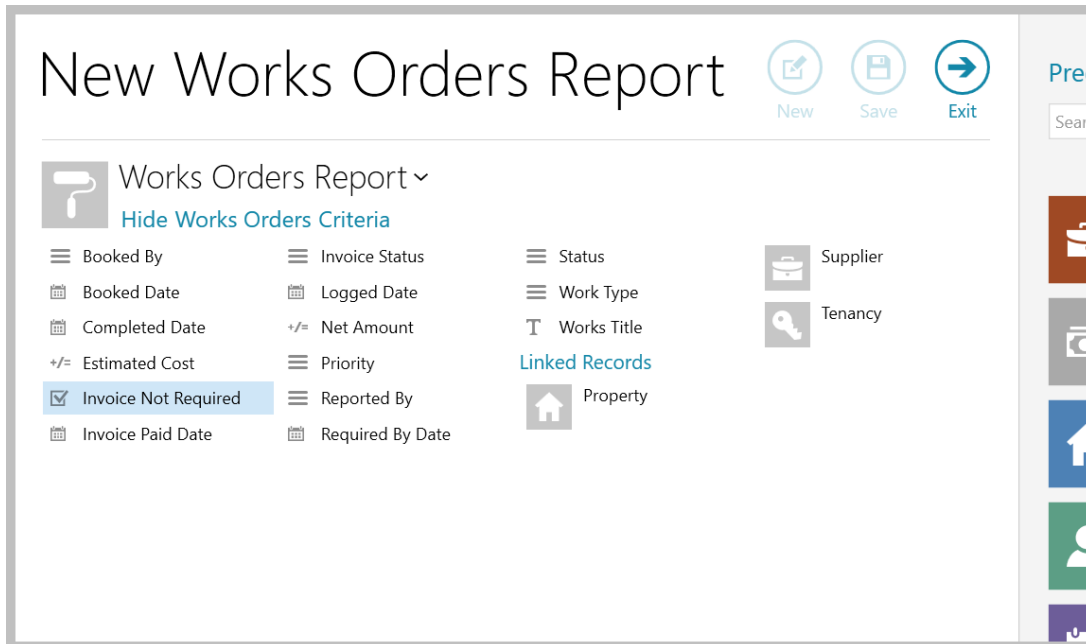


3. Report on works orders that do/do not require an invoice

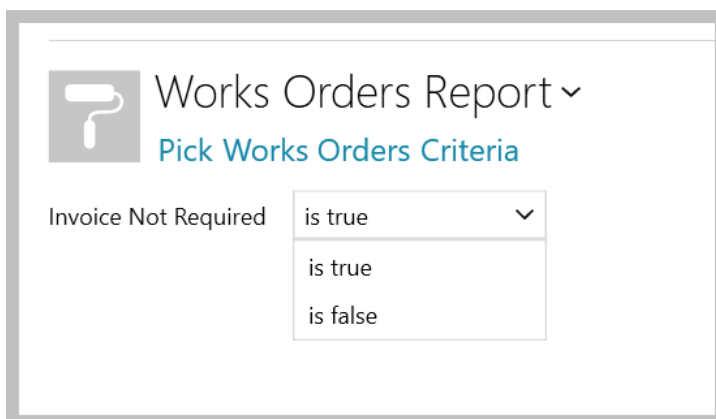
An Invoice Not Required option is available when running a Power Report on works orders

From Reports on main menu:

- Click **Power Reports**
- Select **Works Orders** report type
- Select **Invoice Not Required** plus any other criteria options required






- Select **is true** or **is false**




Example report

This report will return all completed works orders where an invoice is not required

New Works Orders Report

New Save Exit

 Works Orders Report ▾
[Pick Works Orders Criteria](#)

Status ▾ ▾ ×

Invoice Not Required ▾ ×

A works order report results grid can also show the **Invoice Not Required** column

After running a report, add & save the column to the grid, as outlined in step 2

Block Management content**

Period start date (not invoice raised date) used when raising invoice - configuration option (block management)

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

A configuration option is available which allows invoices to be raised (via the Prepare Service Charge Invoices daily process) with the period start date as the invoice date, rather than the date the invoice was raised

This allows arrears to be chased correctly, based on the actual invoice due date, rather than incorrectly chasing arrears based on when the invoice was raised

To enable this configuration option, contact Reapit Support

This function is already available when using AgencyCloud Client Accounts functionality