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

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

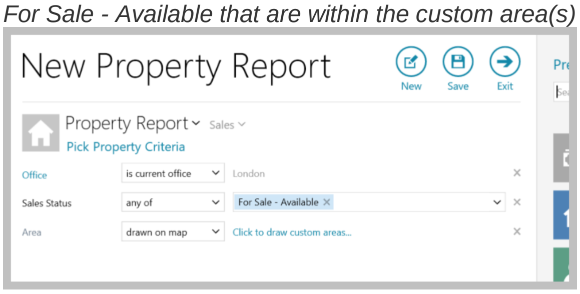
All existing functionality exists but with a refreshed look and feel

Drawing Area(s) on Map

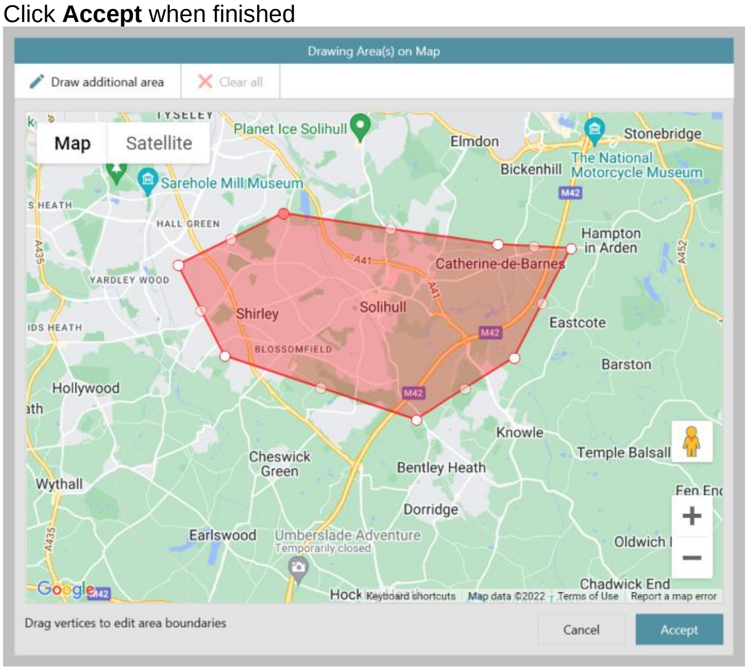
The Drawing Area(s) on Map screen, used when reporting on properties and choosing to draw area(s) on a map, now uses the new UI format

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’

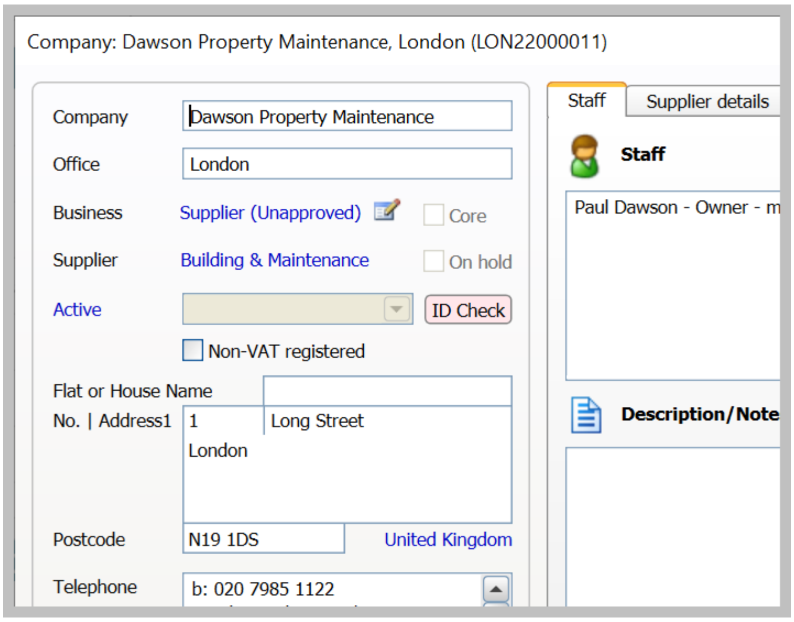
Each of the above configuration settings is set for each checklist item
When contacting Reapit Support to request supplier checklist configuration, please consider which settings are required for each check

1. Access supplier checklist

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

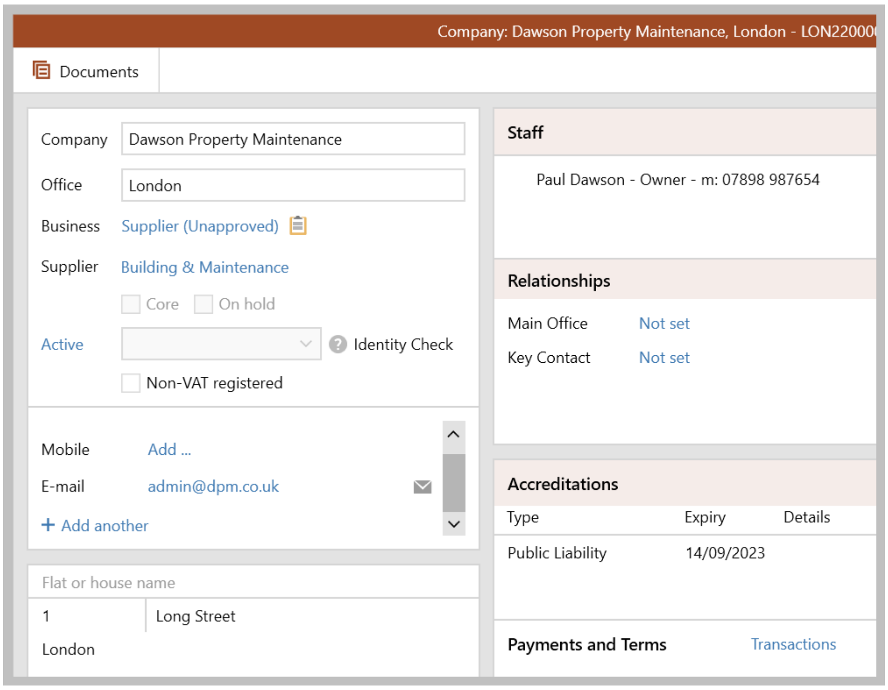
From supplier company record (legacy company screen):

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



If using the new company screen

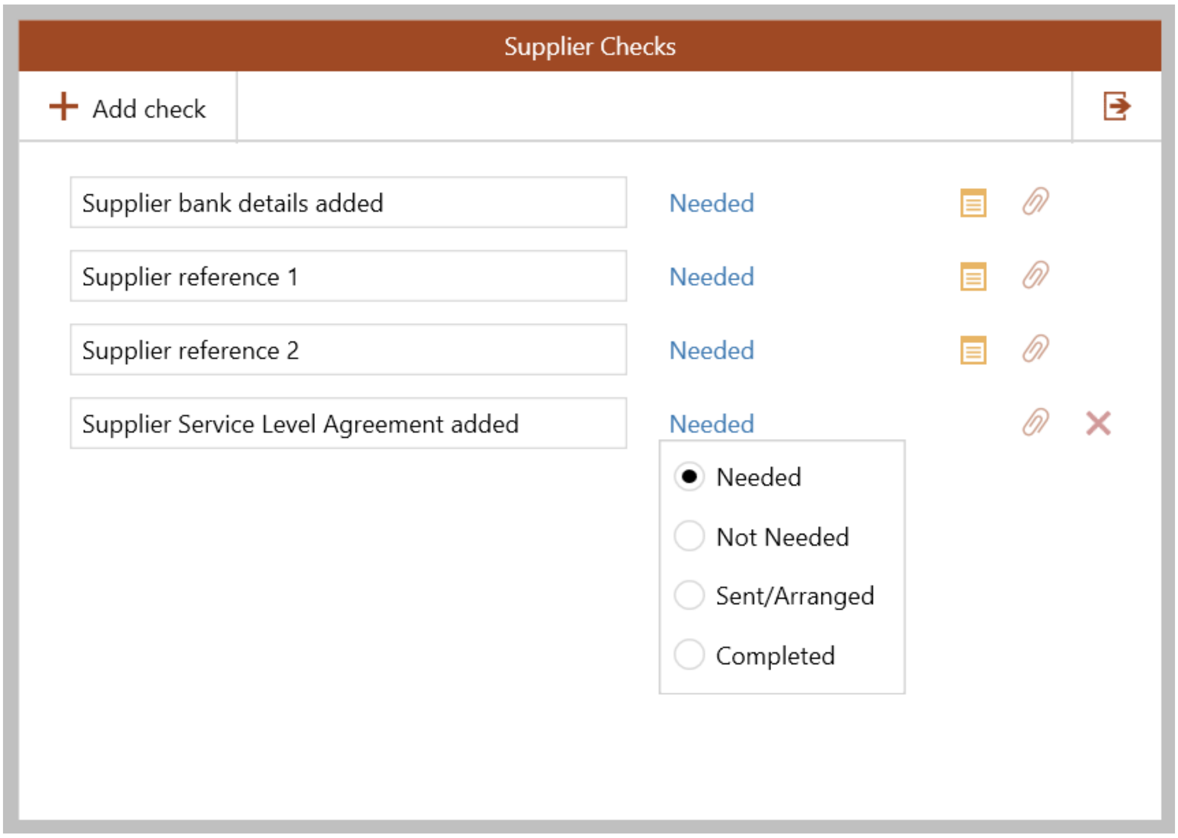
- Click icon to right of **Business** type - which should be set to **Supplier (Unapproved)**



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



- 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

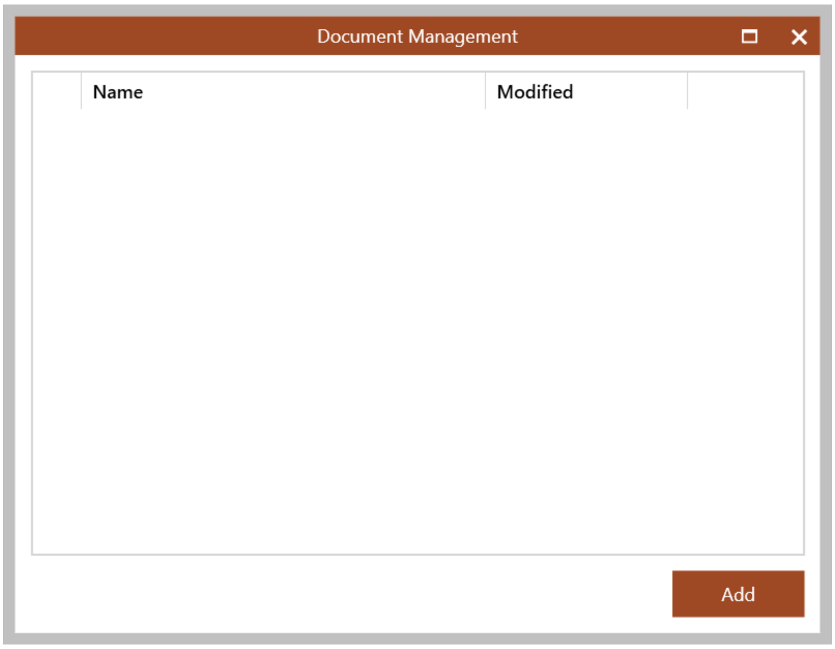
- The paperclip icon beside the check allows you to attach associated documents - see **2a**
  *If a yellow notepad icon is displayed beside the paperclip on a check, this check requires a document to be uploaded before it can be marked as **Completed***

- The order of the checks can be changed - see **2b**

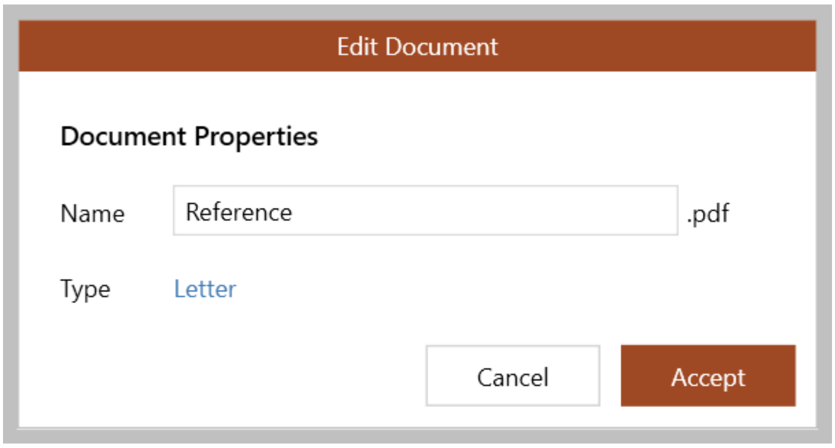
2a. Add/view check documents

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**

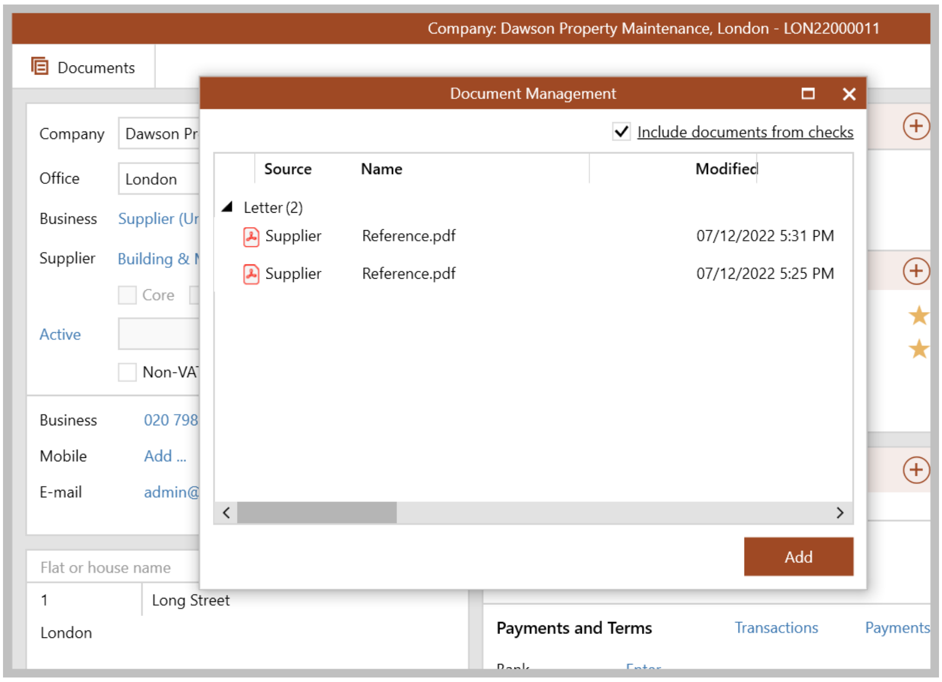


- Click **Accept**
The document is displayed in the Document Management window

View check documents

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

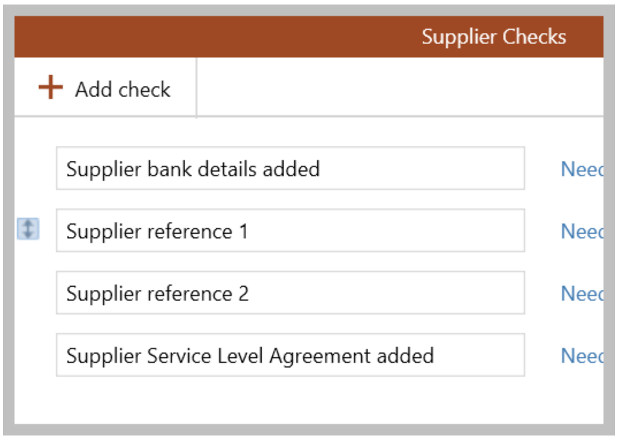
- Click **Documents** (top left) and tick **Include documents from checks**



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



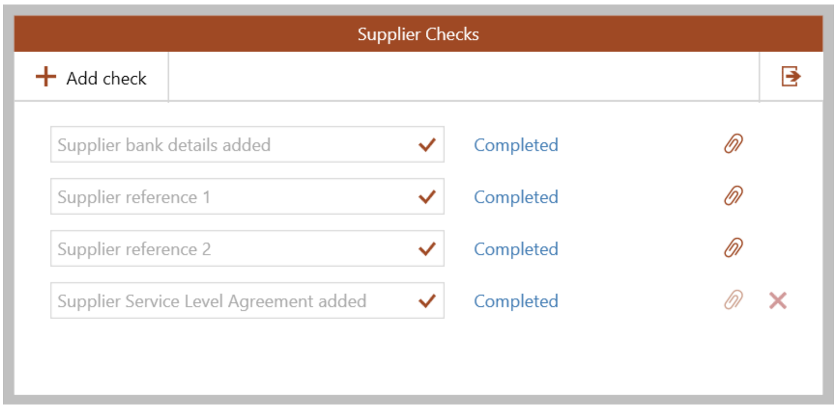
- Click and drag the double-headed arrow icon on left of screen to move the check

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

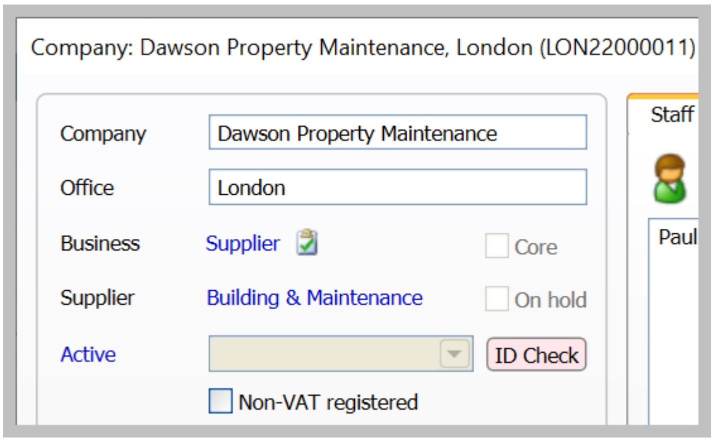
3. Completed supplier checklist

When all items on the checklist are complete:

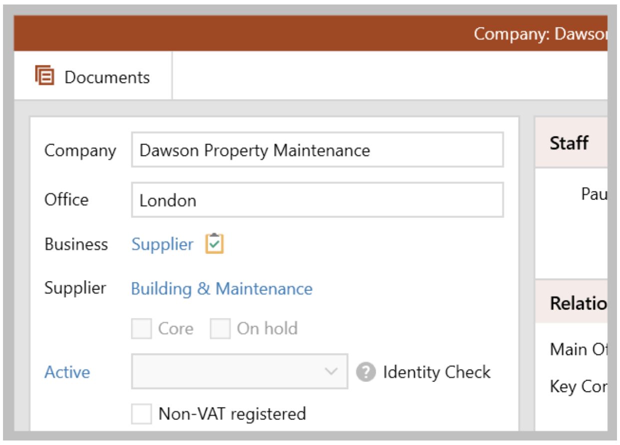
- Each item will display with a tick to the right of the check title



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



New company screen



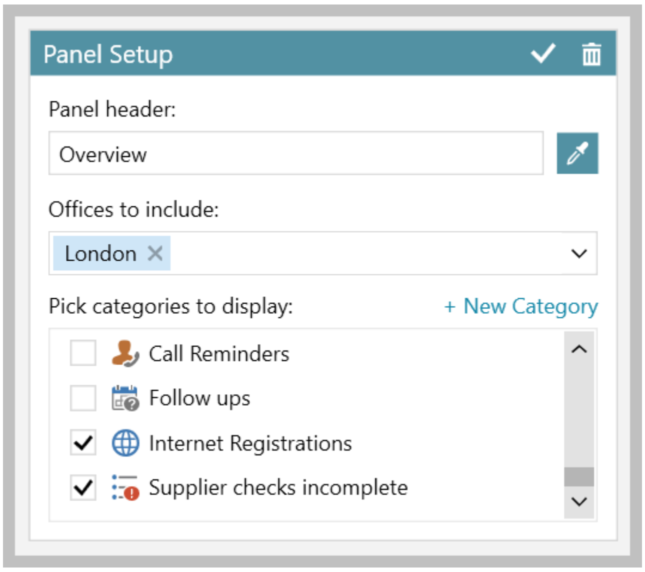
Once marked as complete, the supplier approval process should now be followed
In future releases of AgencyCloud (available early 2023), further functionality will be added to enhance supplier approval processes in conjunction with the supplier checklist

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

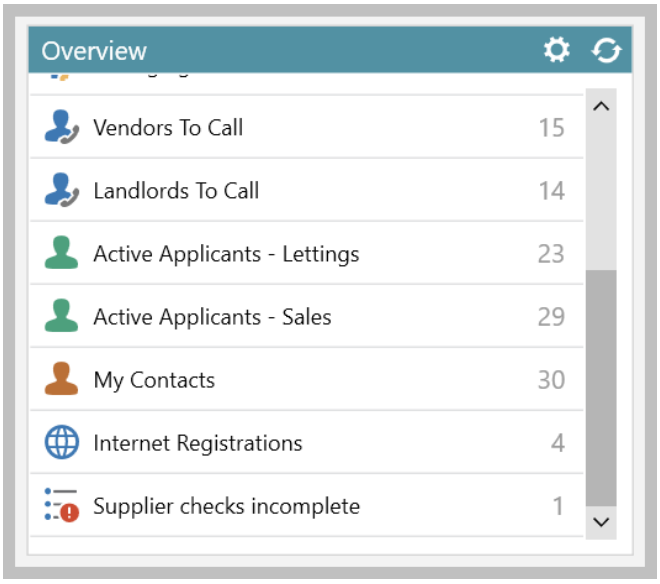
From Organiser:

- 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

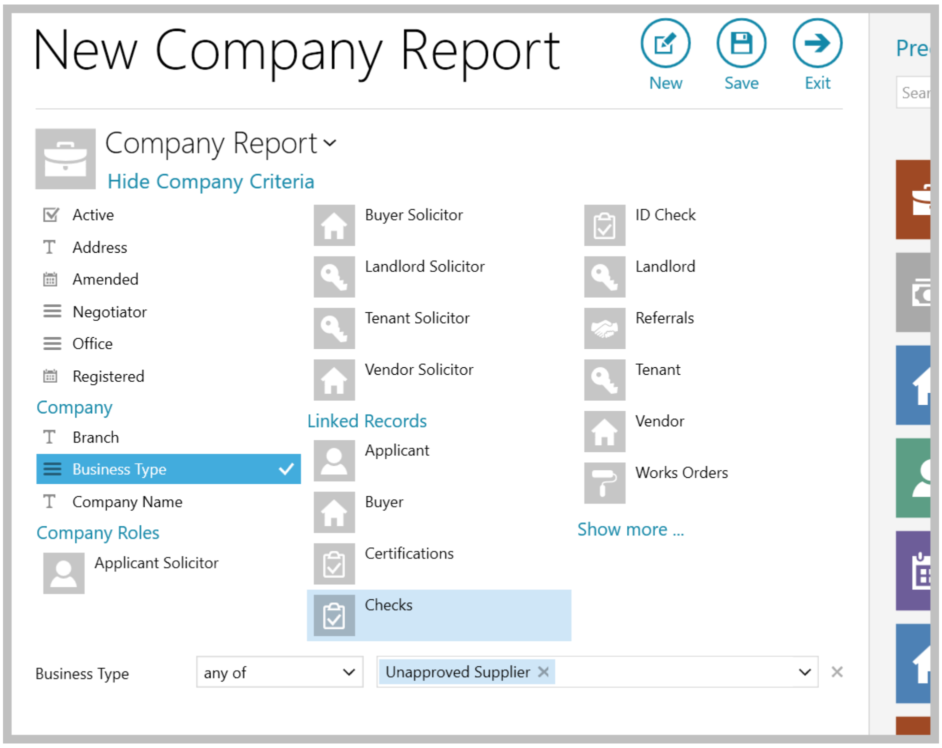


6. Report on supplier checks

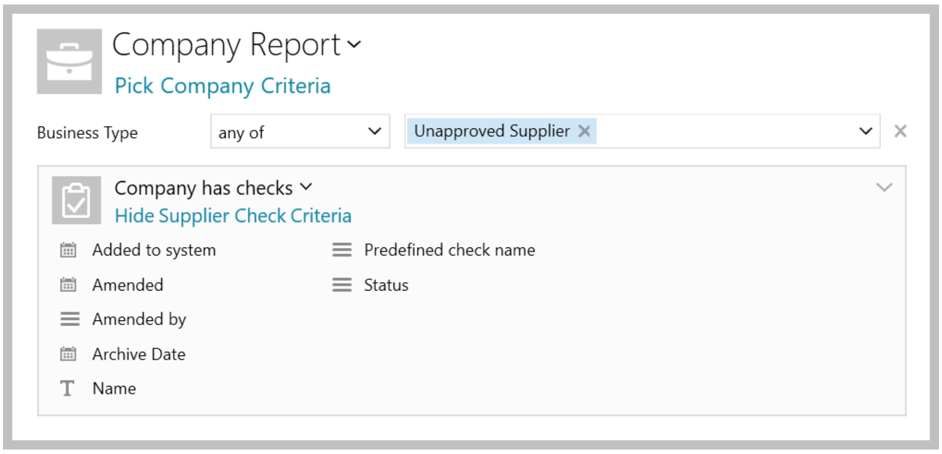
A checks option is available when running a Power Report on company records

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**

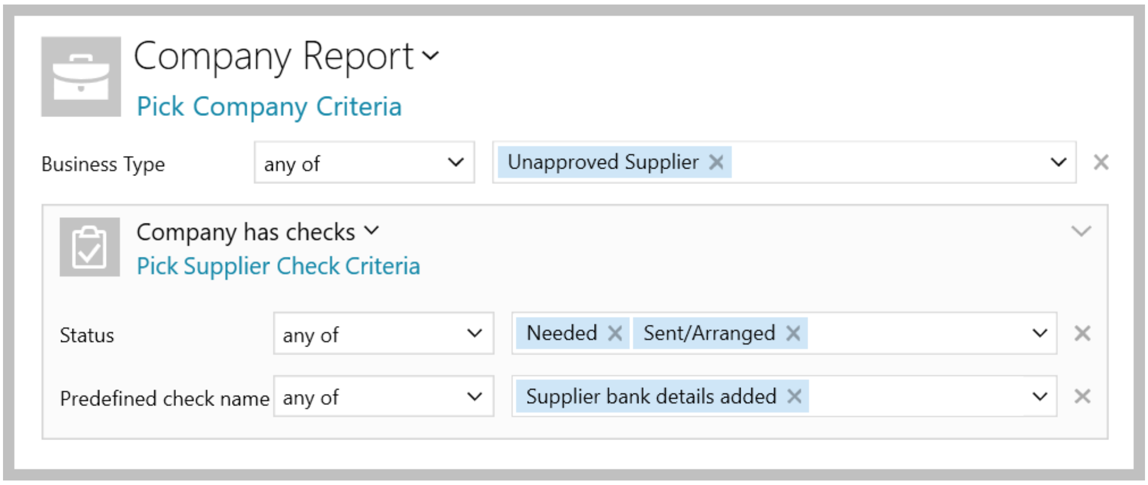


- Select any checks criteria to narrow down the search results, e.g. **Status**



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)



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

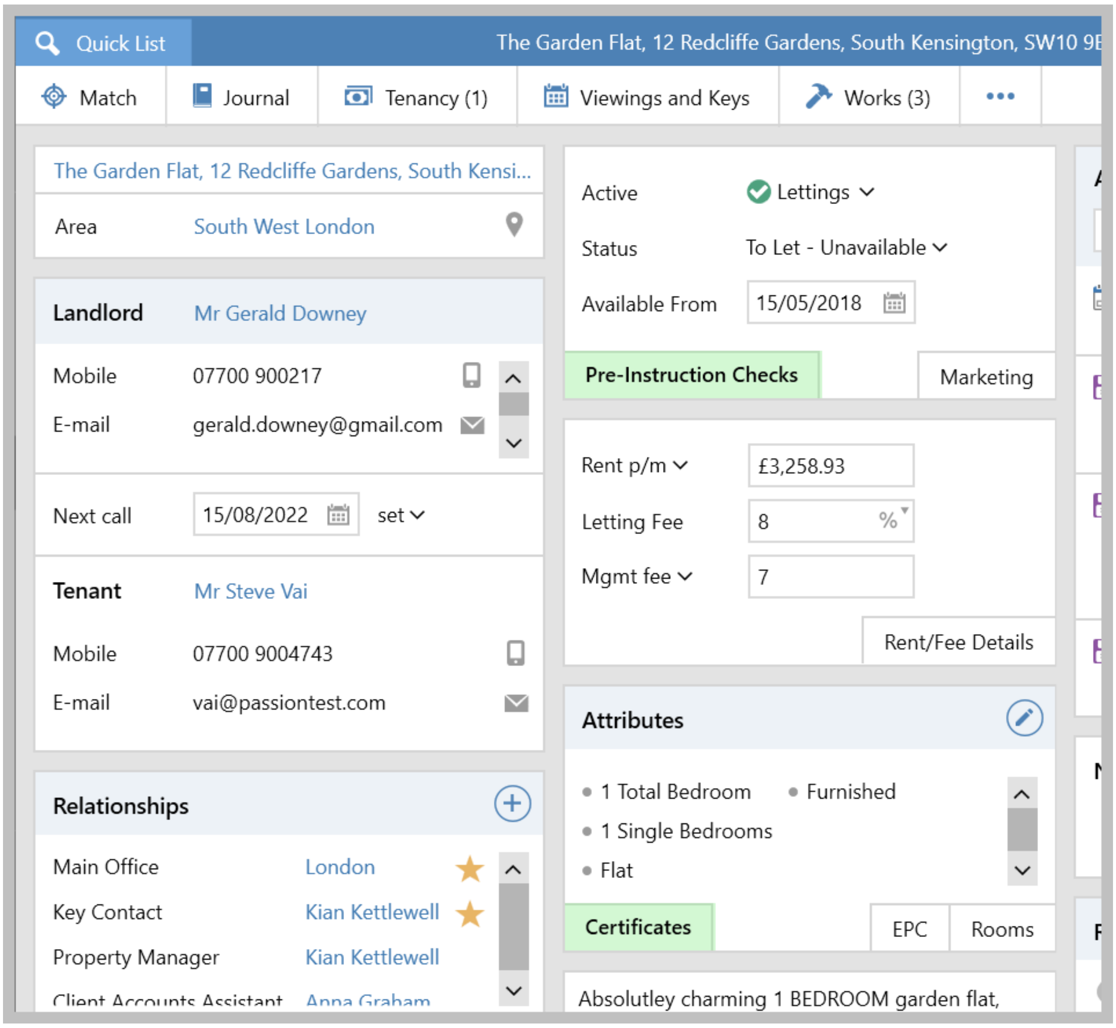
The appliances screen (available on a lettings property) allows you to log whether a carbon monoxide (CO) detector/alarm is required (and its location) for a selected appliance

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]()

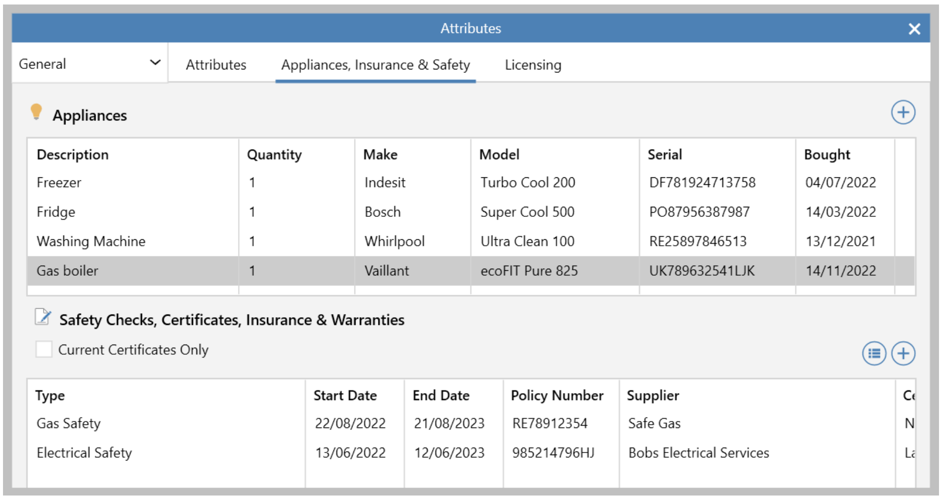
The ability to report on which properties do/don't have appliances with CO alarms will be available in future releases of AgencyCloud (available early 2023)

1. Access appliances screen
From lettings property, Attributes panel:

- Click **edit** (pencil) icon



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

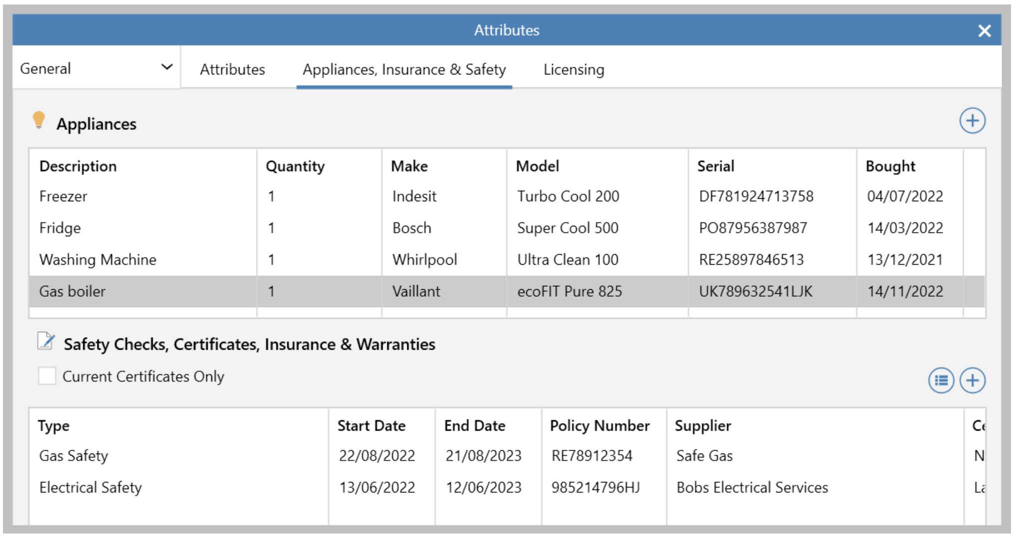


Click **Certificates** button to skip straight to **Appliances, Insurance & Safety** tab in Attributes

2. Add CO alarm requirement & location

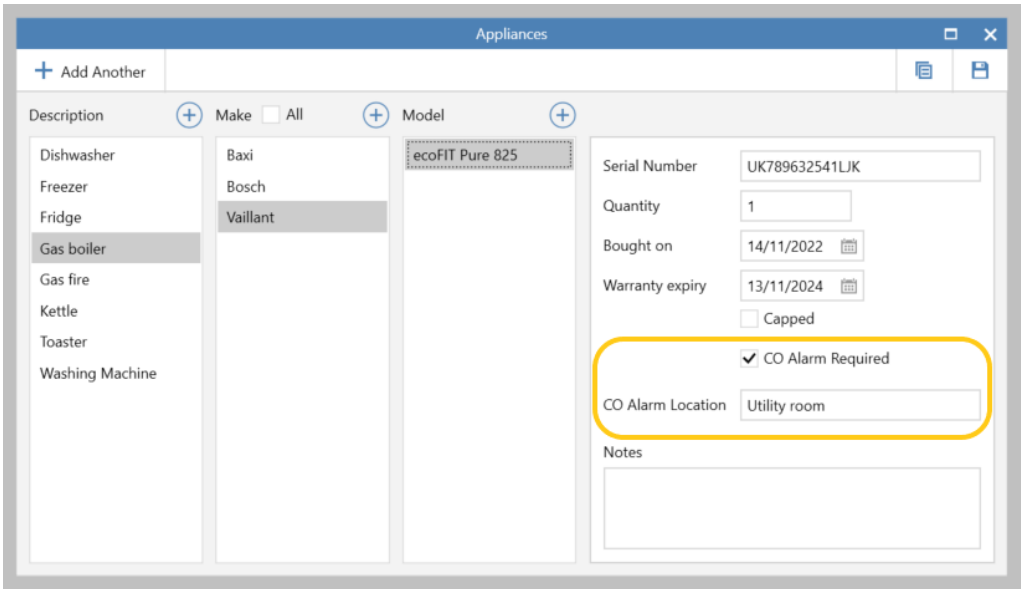
From **Appliances** panel:

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



- 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*



- 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

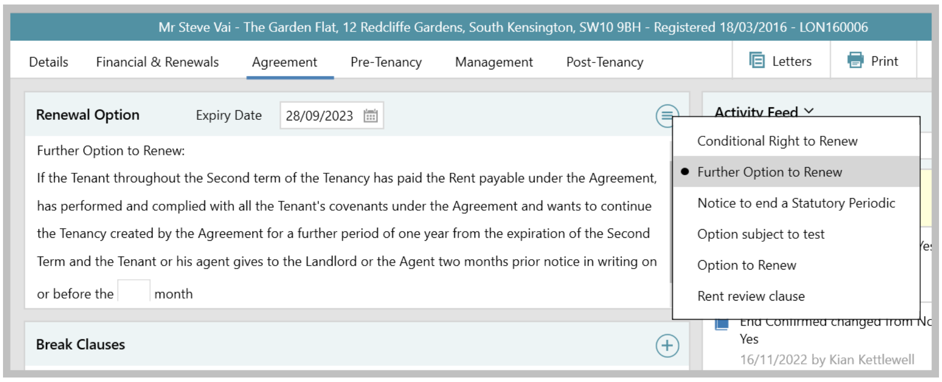
1. Add renewal option & set expiry date

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

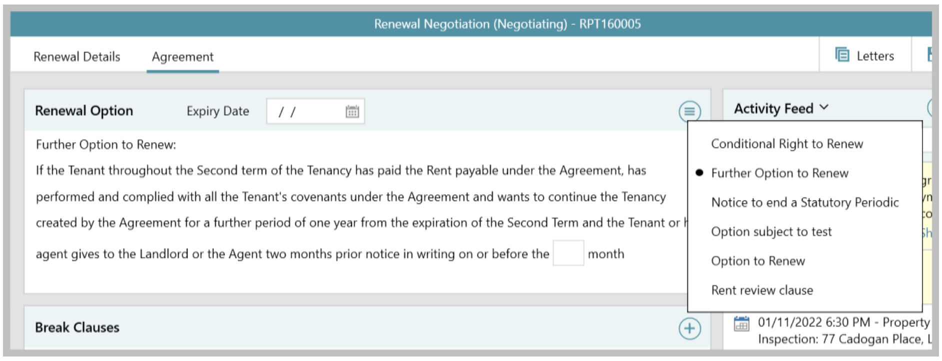
From tenancy/renewal negotiation:

- 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

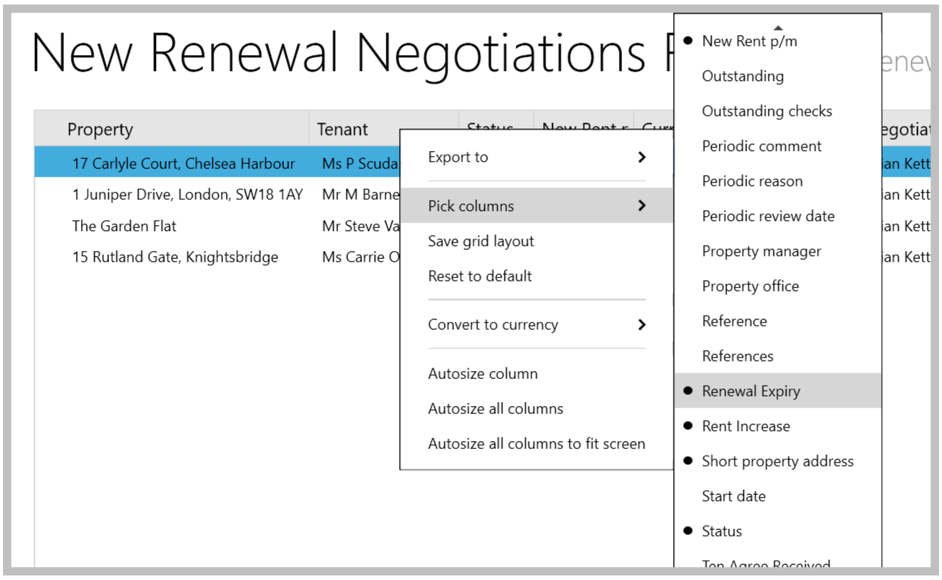


2. Viewing expiry date in tenancy/renewal negotiation reports & grids

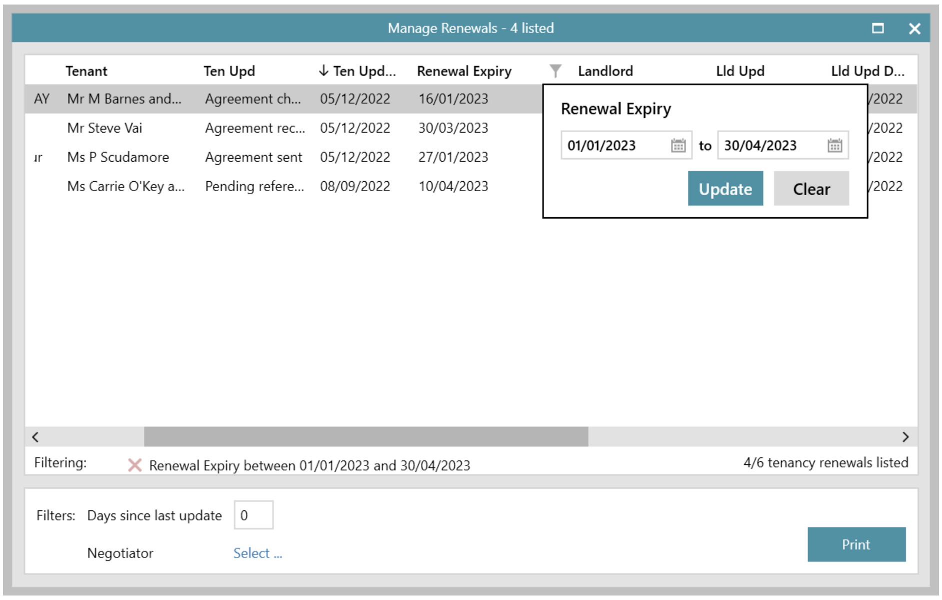
After running a tenancy or renewal negotiation report or viewing a tenancy or renewal report grid, the agreement expiry date can be added and saved on both tenancy and renewal negotiation grids

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

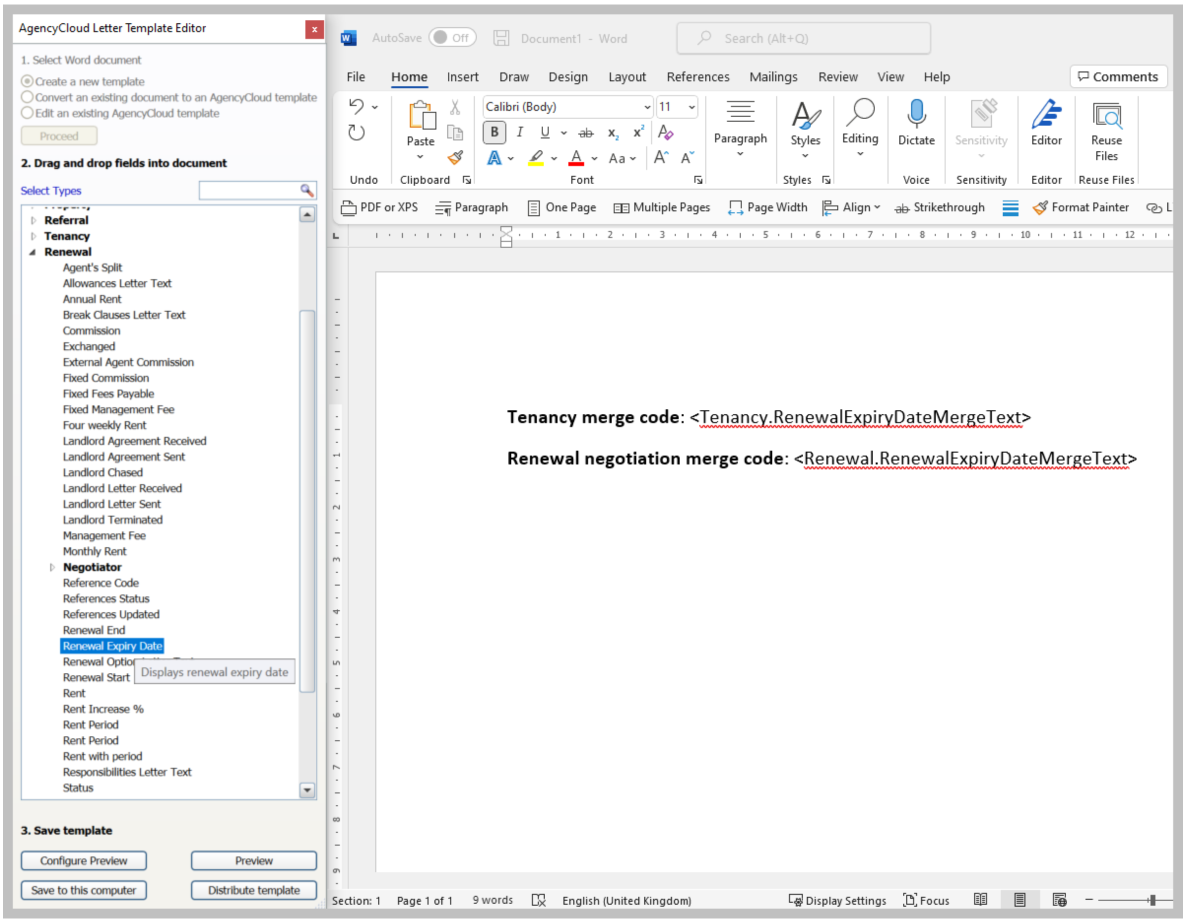
A merge field has been added to the Letter Template Editor (LTE) for use in letters and email templates

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

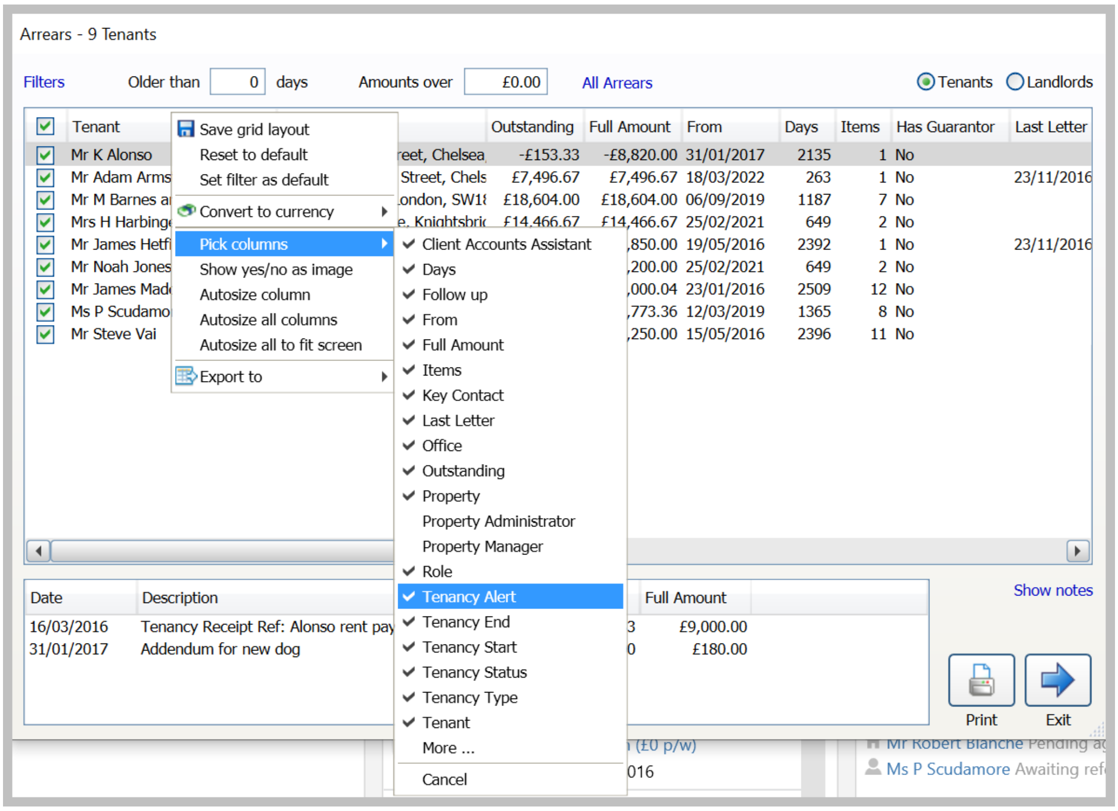
1. Display the tenancy alert column

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**:

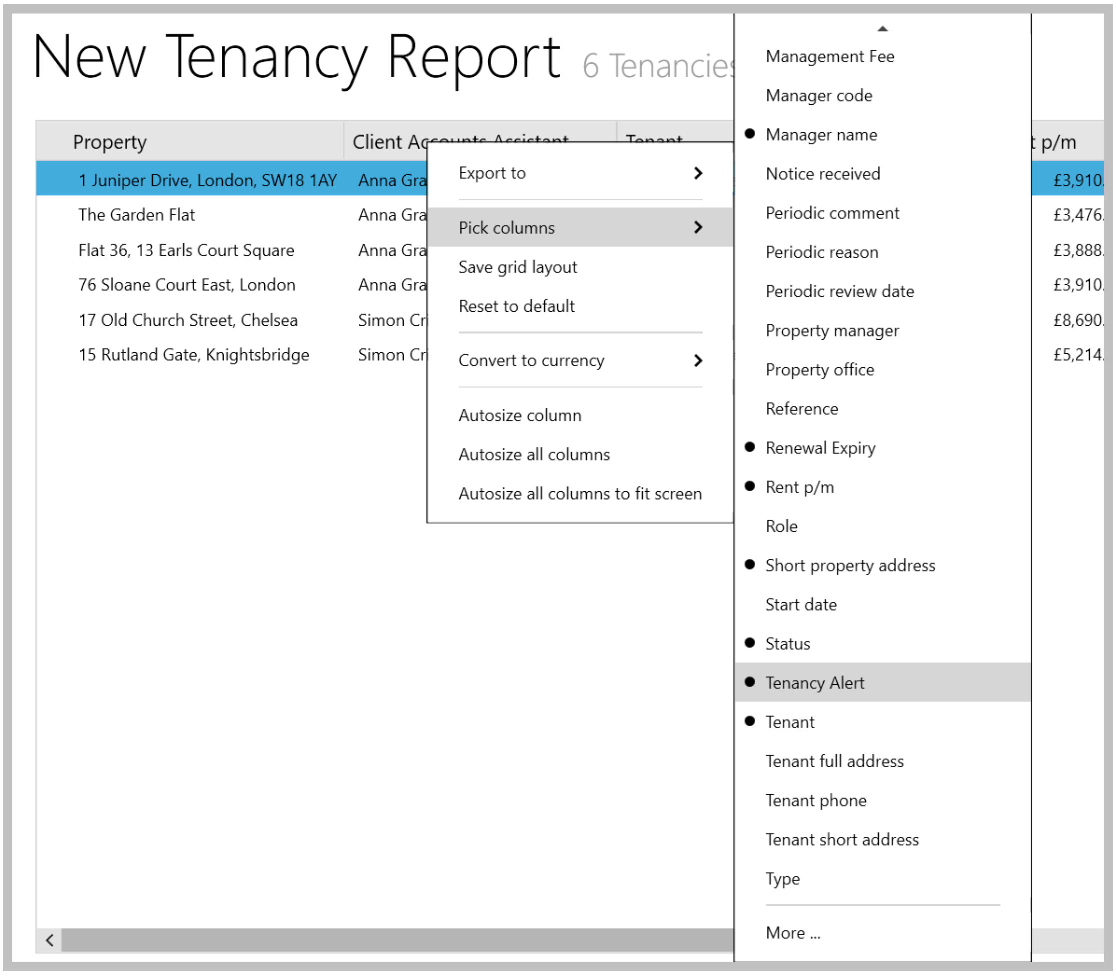
- Ensure grid is set to show **Tenants** arrears (top right)
- Right-click over the column headings, select **Pick columns** and click **Tenancy Alert**



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**

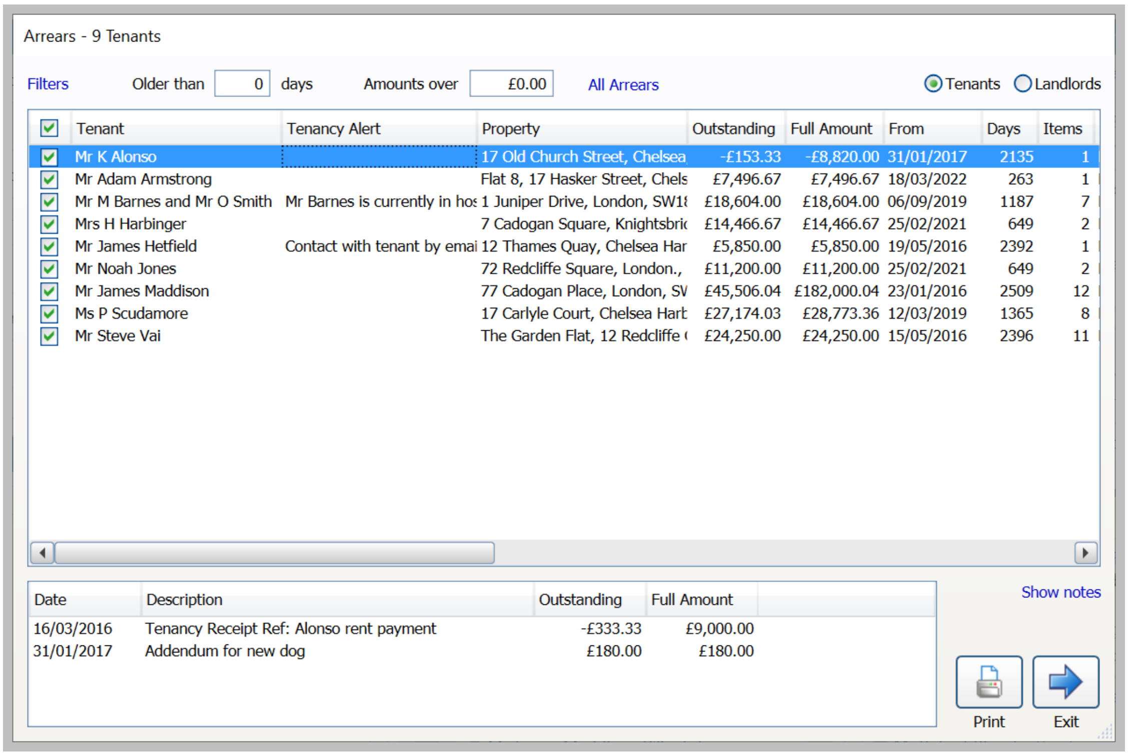


2. Save new column and use grid features to sort/filter

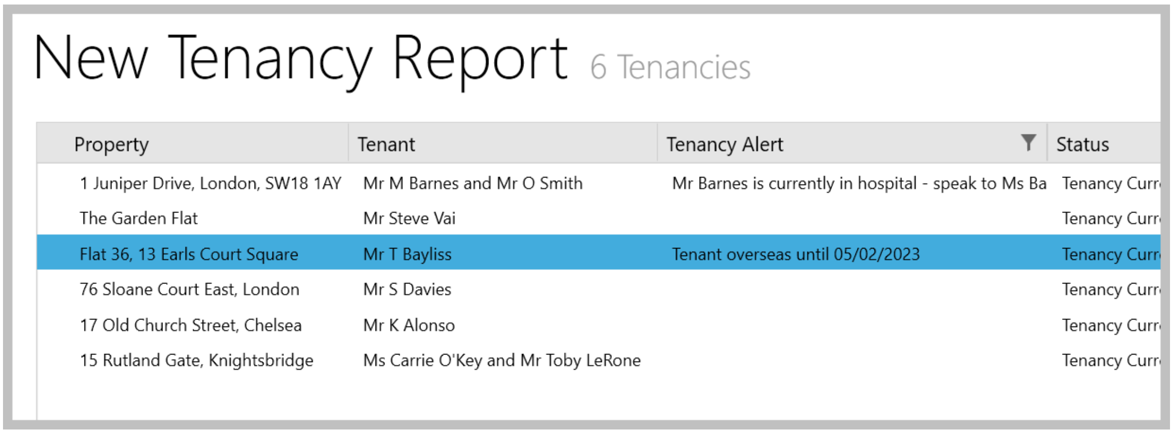
After adding the Tenancy Alert column:

- 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



Power Report



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

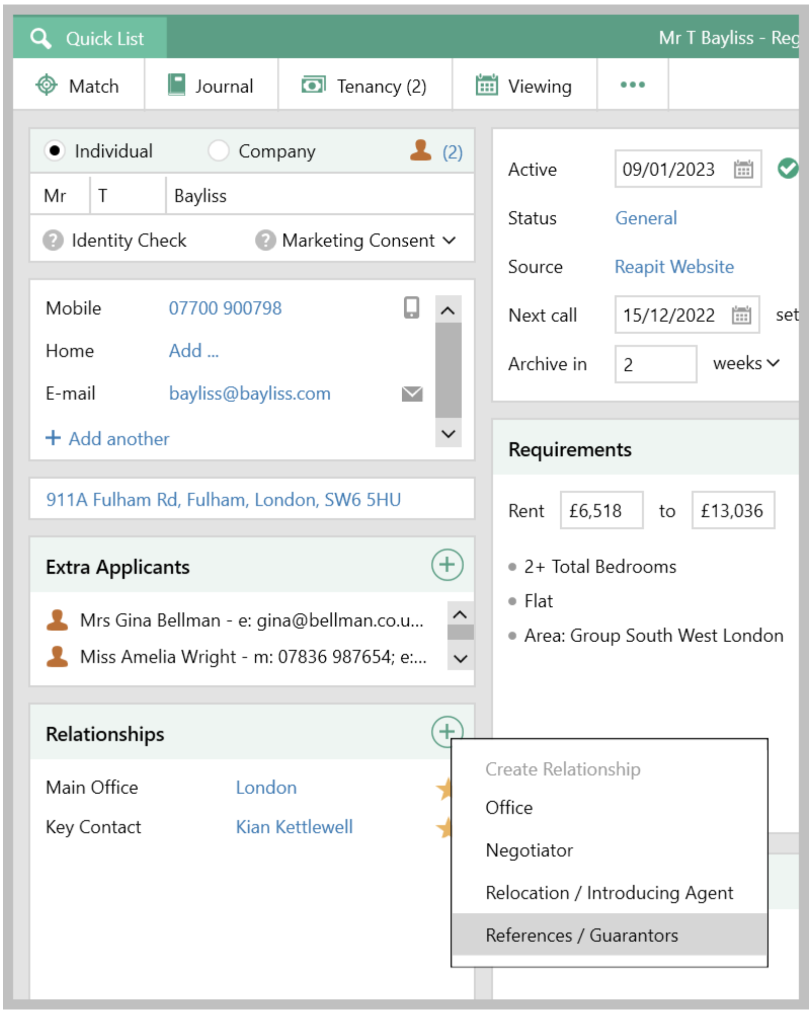
For more information on adding a reference/guarantor, see Knowledge Base

1. Add reference and/or guarantor

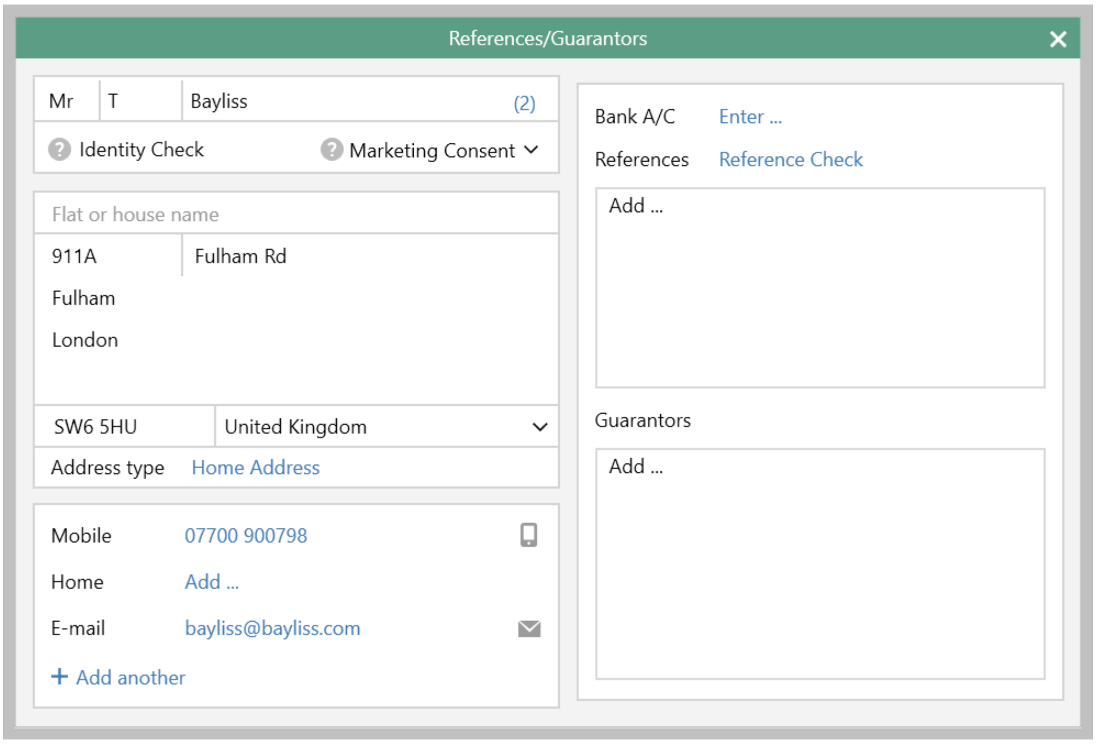
At arranging a tenancy stage, tenant details are held on an applicant record, therefore the applicant screen is used to create the links to the references/guarantors
In this example, the tenancy will have three tenants

From applicant, **Relationships** panel:

- Click and select **References / Guarantors**



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



- The **Search contacts** screen is displayed - search for the required contact
  *If not found, click **Add** to add a new contact record*

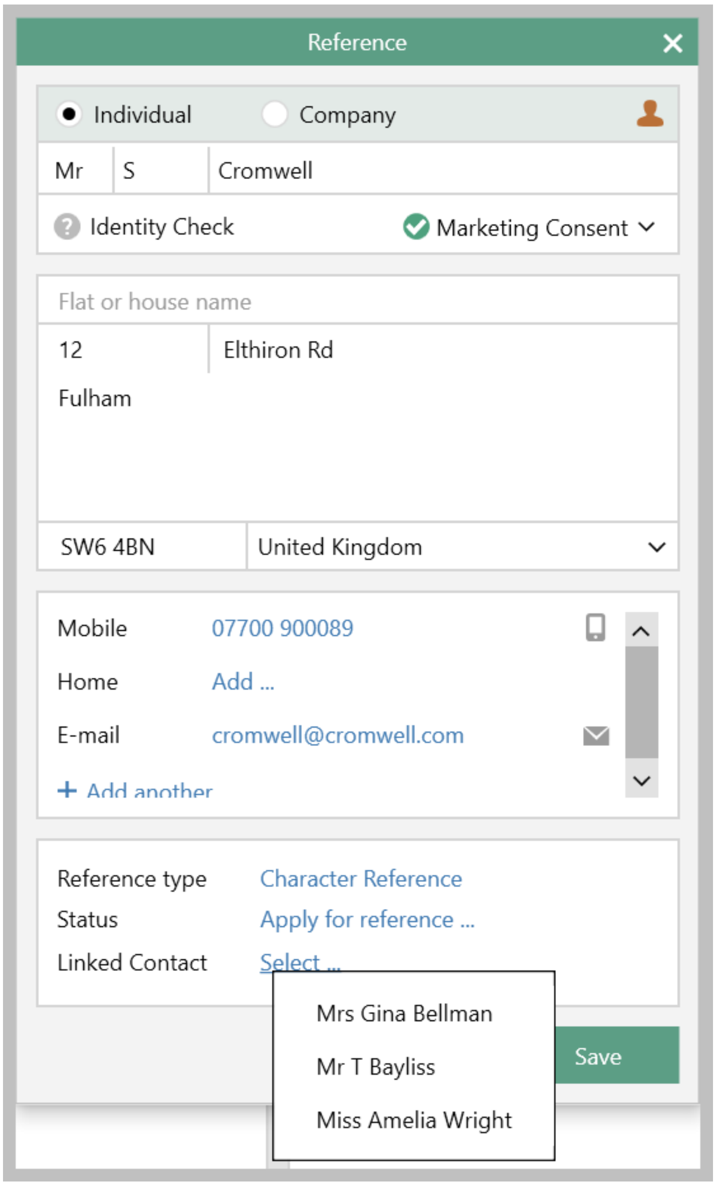
- The Reference/Guarantor screen is displayed with the selected contact details added
  - For a reference, see next step
  - For a guarantor, see step 3

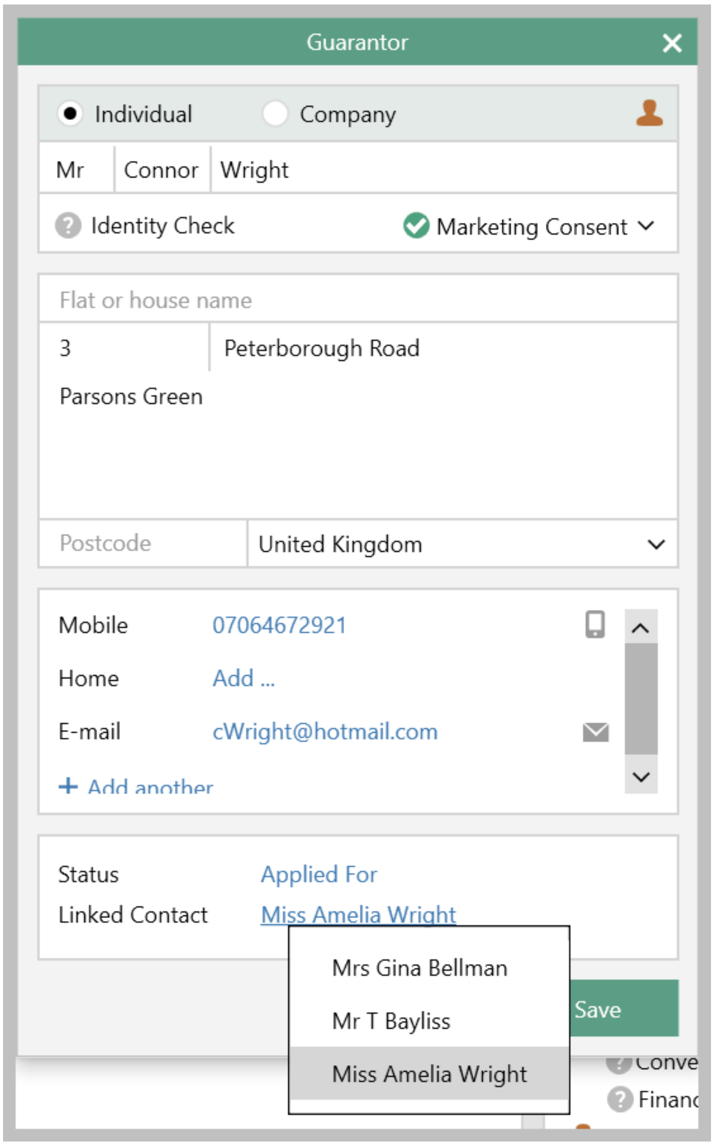
2. Create link to tenant on reference

From Reference:

- Click **Linked contact**

  The tenant names from the applicant record are displayed
- Select the tenant name who the reference is for

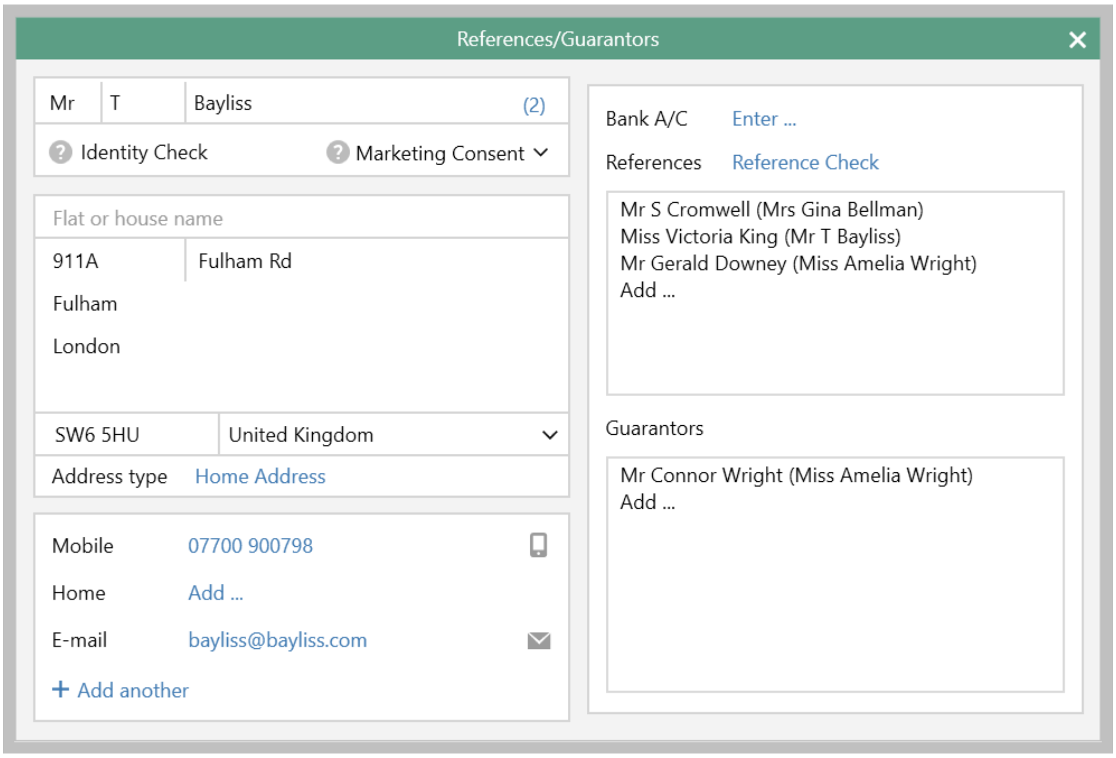


3. Create link to tenant on guarantor From Guarantor: • Click **Linked contact** *The tenant names from the applicant record are displayed* • Select the tenant name who the guarantor is for	

3. Reference/guarantor linked to tenant

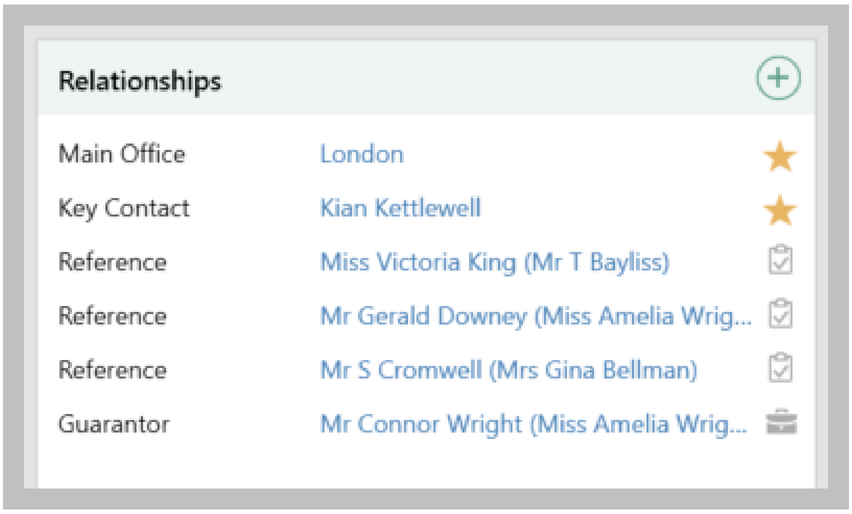
The References/Guarantors screen shows details of the references and guarantors added with the linked tenant name shown in brackets

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



The **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)



Mark works orders as 'invoice not required'

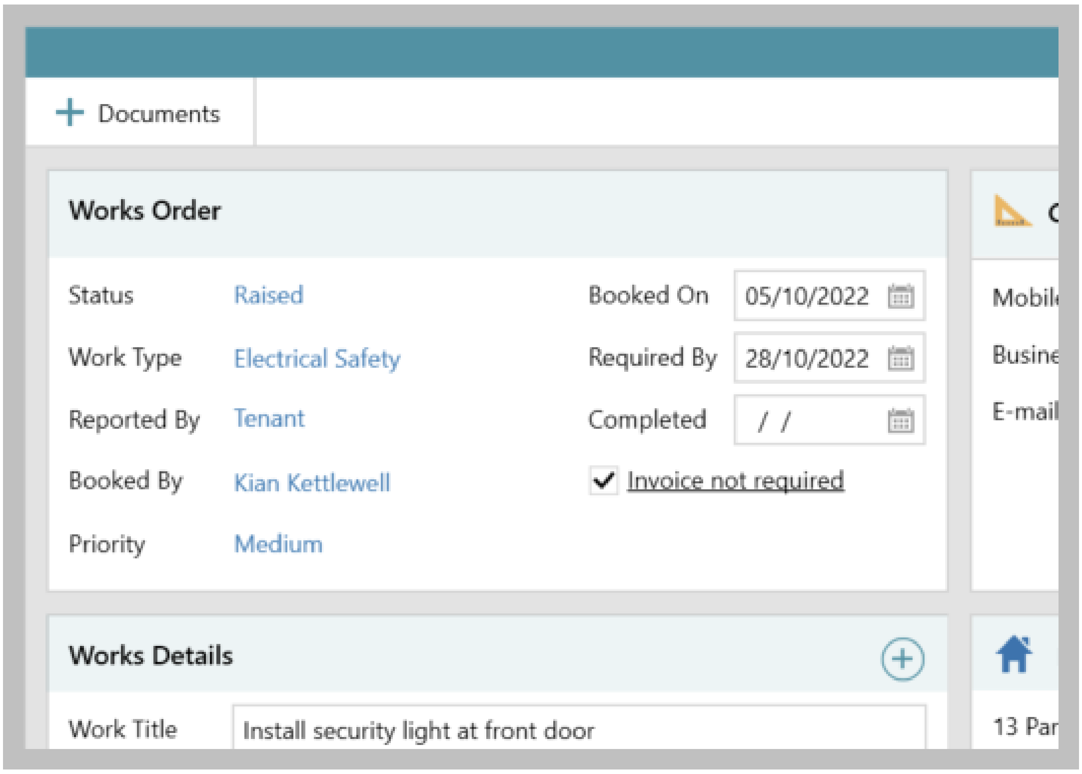
This guide has been reviewed against our global client base and classed as relevant to all regions

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***

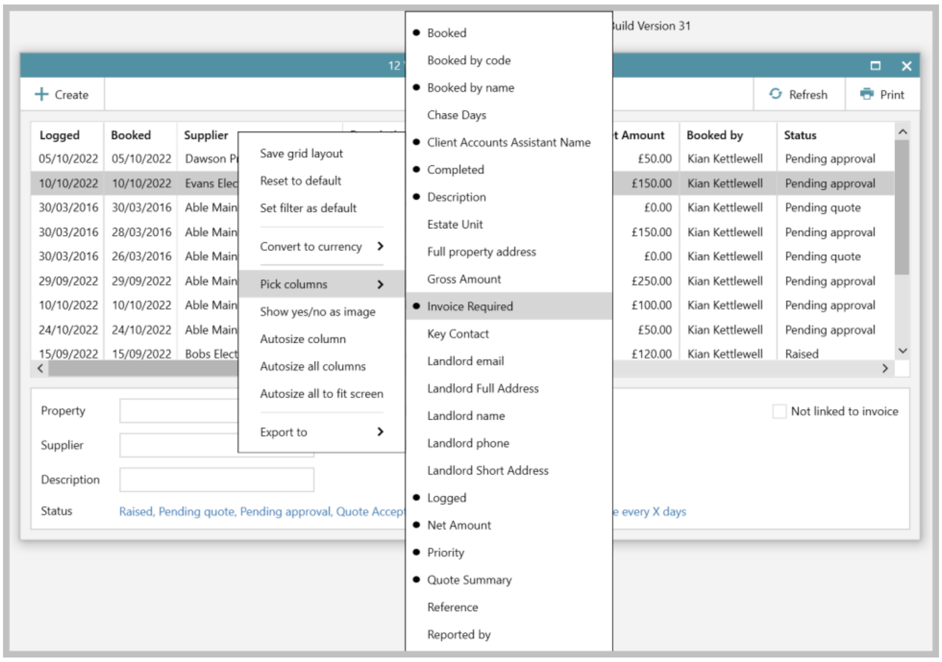


2. View works orders that do/do not require an invoice in works order grids

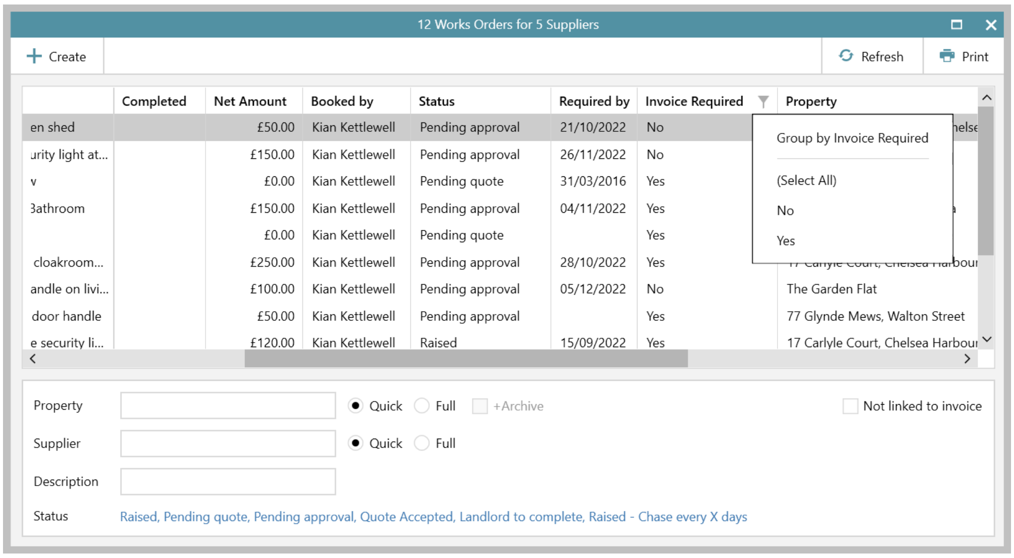
After running a works order report or viewing a works order grid, an **Invoice Required** column can be added and saved

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**

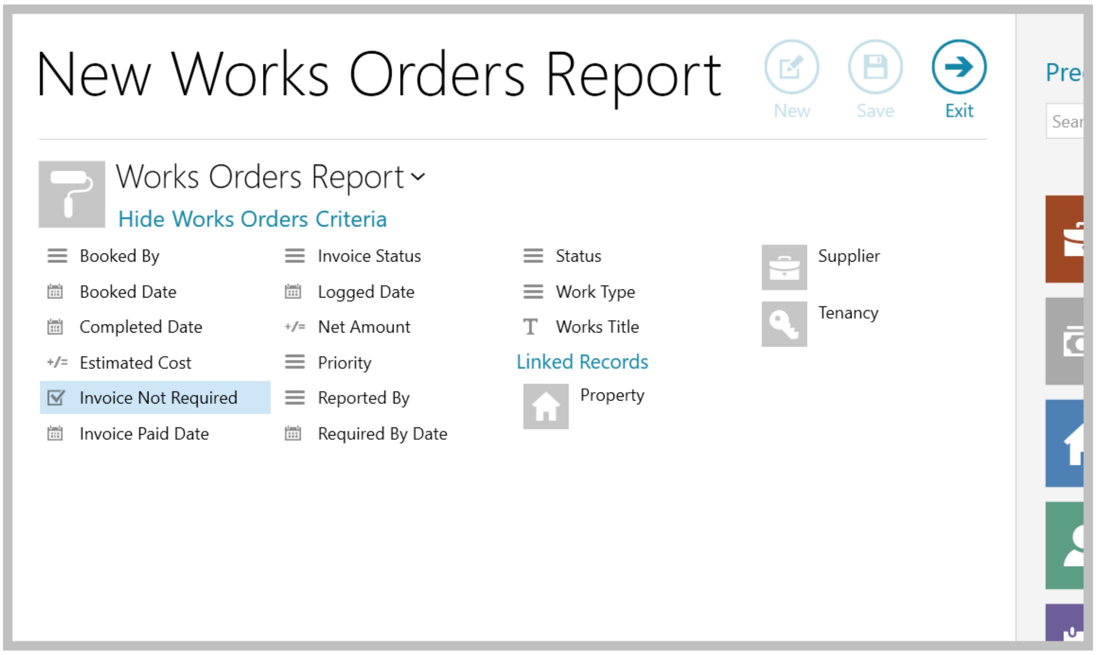


3. Report on works orders that do/do not require an invoice

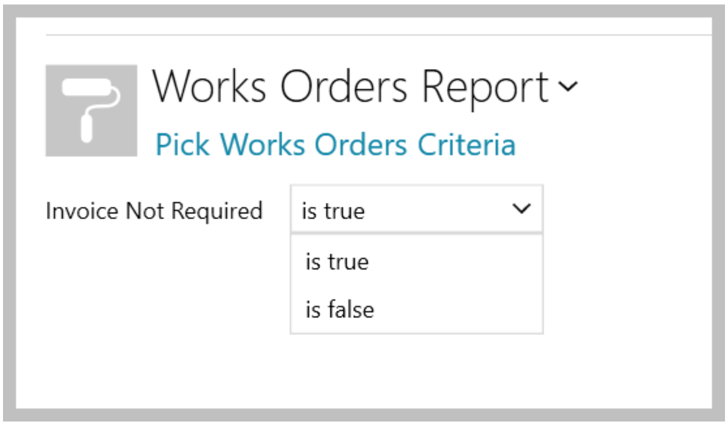
An Invoice Not Required option is available when running a Power Report on works orders

From Reports on main menu:

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

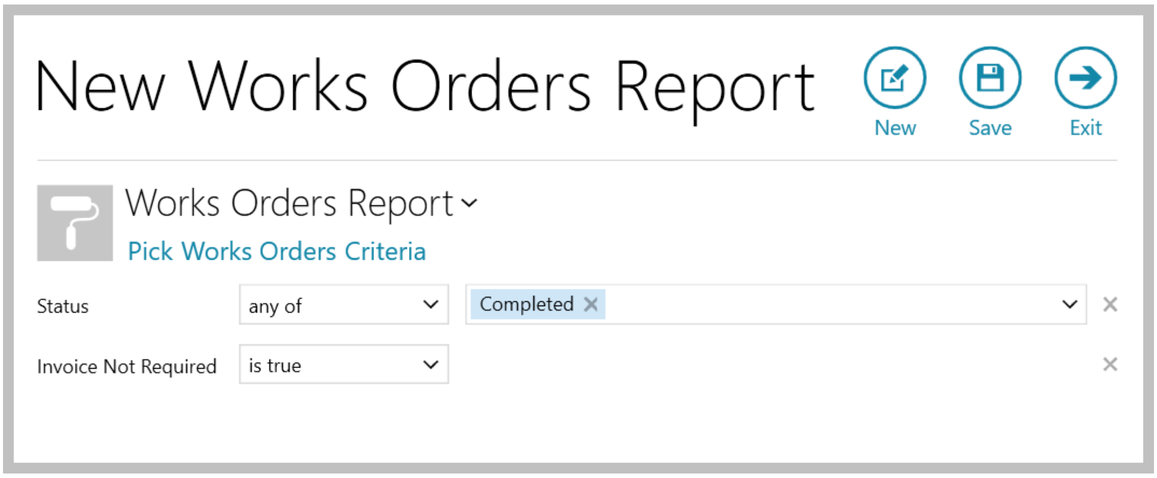


- Select **is true** or **is false**



Example report

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



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