

Reapit AgencyCloud 12.160

release notes

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

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

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

Configuration options are available to Enterprise customers only

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

*** Only applies to users of Block Management*

General

No data needed when carrying out manual override ID check

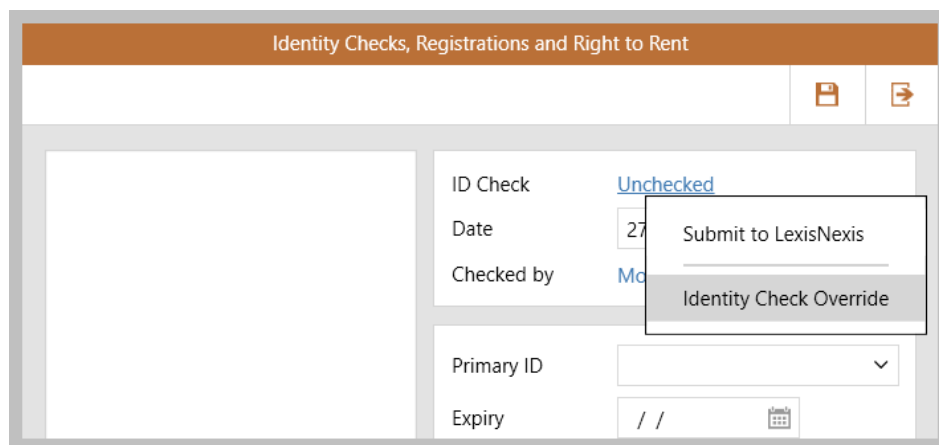
This guide has been reviewed against our global client base and classed as relevant to all regions

When carrying out a manual override on an ID check, it can be carried out without entering any required ID data in the Primary and/or Secondary ID field - this allows a user with the appropriate permissions to log a manual ID check without entering any supporting data

Being able to manually override an ID check is a configuration option - for more information, see Knowledge Base guide titled: *ID check override option - configuration option*

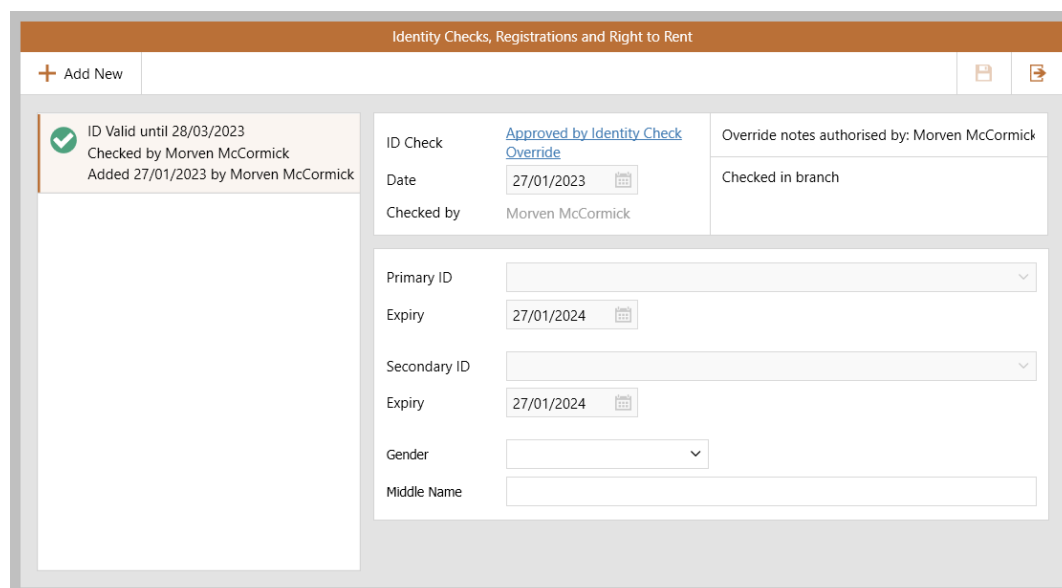
From a contact record:

- Click **Identity Check** to access the ID Check screen
- Click the link beside **ID Check** and choose **Identity Check Override**



The screenshot shows the 'Identity Checks, Registrations and Right to Rent' interface. The 'ID Check' status is 'Unchecked'. A dropdown menu is open, showing 'Submit to LexisNexis' and 'Identity Check Override' (highlighted). Other fields include 'Date' (27/01/2023), 'Checked by' (Morven McCormick), 'Primary ID' (empty dropdown), and 'Expiry' (//).

The ID check can be saved without entering any further detail:



The screenshot shows the 'Identity Checks, Registrations and Right to Rent' interface. The 'ID Check' status is 'Approved by Identity Check Override'. The 'Date' is 27/01/2023 and 'Checked by' is Morven McCormick. The 'Override notes authorised by: Morven McCormick' and 'Checked in branch' are also visible. Other fields include 'Primary ID' (empty dropdown), 'Expiry' (27/01/2024), 'Secondary ID' (empty dropdown), 'Expiry' (27/01/2024), 'Gender' (empty dropdown), and 'Middle Name' (empty text field).

New UI round-up/changes: v12.160

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 or elements changed in 12.160 to bring them in line with previously redesigned screens

Company screen

This screen has been on gradual roll-out for several months, therefore may already be live on your system

The Company screen now uses the new UI format - all existing functionality exists but with a refreshed look and feel

The screenshot shows the 'Company' screen for 'Johnson & Johnson Building Maintenance, Battersea - LON2200009'. The interface is divided into several sections:

- Documents:** A top navigation bar with 'Documents', 'Journal', and other icons.
- Company Information:** Fields for Company name, Office (Battersea), Business (Supplier), Supplier (Building & Maintenance), and Active status. Includes an 'Identity Check' indicator and 'Non-VAT registered' checkbox.
- Staff:** Lists James Johnson (Partner - m: 07923 456789) and Fran Johnson (Partner - m: 07958 123456).
- Relationships:** Lists Main Office (London) and Key Contact (Anna Graham).
- Accreditations:** A table with columns for Type, Expiry, and Details. One entry is Public Liability with an expiry of 05/12/2023.
- Payments and Terms:** Includes fields for Bank (High Street Bank, London), Nominal code (Select ...), Commission paid to agent on supplier invoices (0.000 %), Referral Fee (£0.00), and Terms description.
- Activity Feed:** A feed of recent updates, such as 'Johnson & Johnson Building Maintenance, Battersea: AC No/IBAN changed to 987654321, Sort Code/...' and 'Contact details changed from b: 020 7369 1234; to b: 020 7369 1234; e: admin@johnsonjohnsonbm.co.uk; 06/12/2022 by Kian Kettlewell'.
- Address:** Fields for Flat or house name (2), Street (Long Lane), Postcode (Battersea), and City (London).
- Areas Covered:** A dropdown menu showing 'Central & South London'.
- Public:** A checkbox for 'Opt out of marketing'.

The new company screen is explained in more detail in the Knowledge Base guide titled: *New user interface - company/supplier screen*

Lettings property attributes - utilities panel

The utilities panel, at the bottom of a lettings property attributes screen, has been re-organised for ease of use - all existing functionality remains

From lettings property, to view the **Appliances, Insurance & Safety** tab of the attributes screen:

- Click **Certificates**
The re-designed **Utilities** panel can be seen at the bottom of the screen
- All previously available options can still be found in the Utilities section, except for **Certificate Responsibility** which has moved to the certificates panel above

The screenshot shows the 'Attributes' screen with the 'Appliances, Insurance & Safety' tab selected. The 'Utilities' panel at the bottom is highlighted with a yellow border. It contains the following information:

Utilities	Supplier	Meter Point	Utilities	Supplier	Main Heating	Independent CHW
Gas	British Gas, Head Office	<input type="text"/>	Telephone	Virgin Media	Exceptions	
Electricity	British Gas, Head Office	<input type="text"/>	Internet	Virgin Media	<input type="checkbox"/> No gas	
Water	South West Water, Lo..	<input type="text"/>	Cable TV	Virgin Media	<input type="checkbox"/> No electrical certificate warning	

Exchange & completion wizard

The exchange & completion wizard screens, seen when changing a sales property status to Exchanged and Completed, now uses the new UI format - all existing functionality exists but with a refreshed look and feel


See next page

Exchange wizard

After changing the property status to **Exchanged**:

- The Exchange Wizard will launch, ready to select the buyer from the list
- Step 2 allows the selling details to be entered/confirmed
- Step 3 requires the commission details to be entered/confirmed


Exchange Wizard

 Select buyer from list


RPT	Mrs Annabelle Jones (applicant)
RPT	Ms Aurla Waller (applicant)
RPT	Ms Aurla Waller (applicant)
RPT	Mr Sam Jones (applicant)
RPT	Smith (applicant)
RPT	Mr A Smith (applicant)
RPT	Mr Bertie Russell (applicant)
RPT	Smith (applicant)
RPT	Mr Jonah Blair (applicant)
Other	

Cancel Next >>

Exchange Wizard

 Selling Details

Exchange Price

Exchange Date 

Selling Company

Us


Joint Agent

Sub Agent

Sold Externally

Cancel << Back Next >>

Exchange Wizard

 Commission Details

Selling Negotiator Reapit

Selling Office Head Office

Company's fee

Selling office fee


Cancel << Back Finish

Completion wizard

After changing the property status to **Completed**:

- The Completion Wizard will launch, allowing the buyer details to be updated accordingly
- Step 2 allows the vendor information to be updated

Completion Wizard

 **Manage Buyer(s)**


Applicant options

Delete Applicant

Archive Applicant

Leave Applicant


Buyer Addresses


 **Mrs Annabelle Jones**

Change address from: High Street, Gloucester, GL1
to: [Leckhampstead, Buckingham, MK18](#)

Cancel Next >>

Completion Wizard

 **Manage Vendor(s)**

 **Mr Rudi Mcdermott**

Change address from: Leckhampstead, Buckingham,
MK18
to: [None](#)

Cancel << Back Finish

The exchange & completion process is covered in more detail in the Knowledge Base guide titled: *Exchange & completion process*

Sales & lettings/rentals

Organiser efficiency enhancement - 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 better performance when loading the Organiser - this is achieved by not including shared contacts via the My Contacts list which, in turn, speeds up the loading of the Organiser counts and related data

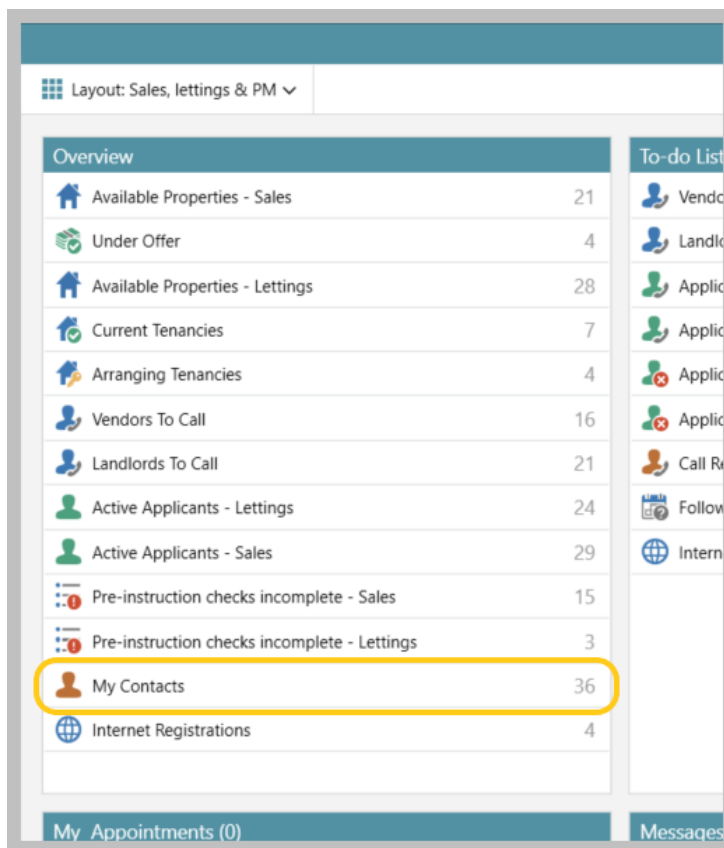
This is a useful option to enable on a system where the Organiser is slow to load and where shared contacts do not need to be included in the Organiser My Contacts list

To enable this configuration option, contact Reapit Support

1. My Contacts list on Organiser

From Organiser, Overview panel:

- With the configuration enabled, **My Contacts** will not include any shared contacts



2. What is a shared contact?

A shared contact is one where the AgencyCloud user is identified in the **Relationships** panel on the contact record as a **Negotiator** but is not the **Key Contact**

Example

With the configuration enabled, this contact will show in Karen Hammond's My Contacts list but will not show on Kian Kettlewell's list

The screenshot displays the contact record for Mr Noel Fahey, registered on 25/05/2018 with ID LON18000003. The interface includes tabs for Contact, Categories & Mailings, and Employment. The contact details are as follows:

- Name:** Mr Noel Fahey
- Status:** Active
- Source:** Country Life
- Bank Details:** Enter details ...
- Correspondence:** Private & confidential (unchecked)
- Date of Birth:** / /
- Relationships:**
 - Main Office: London (star icon)
 - Key Contact: Karen Hammond (star icon)
 - Negotiator: Kian Kettlewell (star icon)
- Access:** Access not restricted

The contact's address is listed as 1 Weighbridge Road, London, NW2 3WW, United Kingdom. The contact also has a mobile number (Add ...), a home number (0208 345678), and a work email (noel@fahey.co.com). The Relationships panel is the key feature here, showing that Kian Kettlewell is listed as a Negotiator, which explains why the contact appears in Karen Hammond's list but not Kian Kettlewell's.

Document importer - further enhancements

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

The bulk document importer has been further enhanced to ease understanding when using the works order invoice and property inspection views

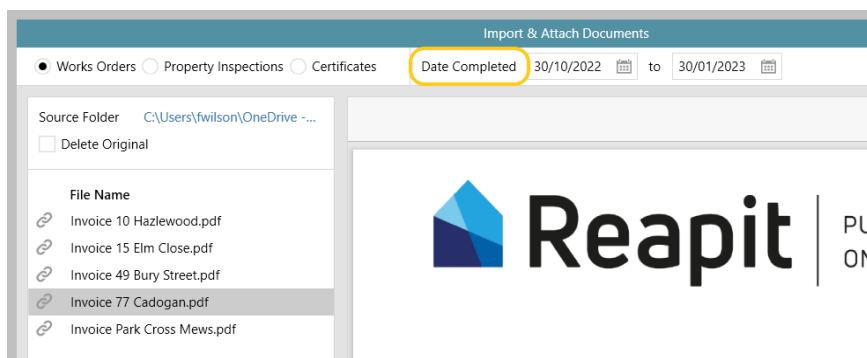
This has resulted in the following two label changes

1. Works orders view

From **Works Orders** view (to import supplier invoices):

- A **Date Completed** label has been added

This makes it clear that the works orders shown in the importer are based on the date the works orders were marked as completed

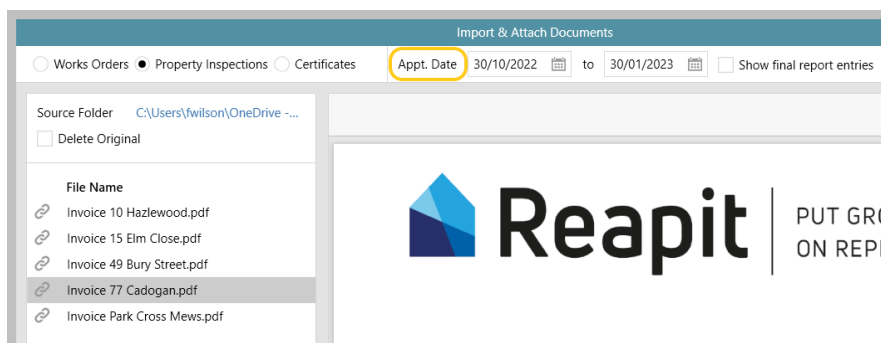


2. Property inspection view

From **Property Inspections** view (to import inspection documents):

- An **Appt. Date** label has been added

This makes it clear that the property inspection appointments shown in the importer are based on the date of the property inspection appointment



The document importer can be used from version 12.159+

For more information on enabling and using the document importer, see Knowledge Base guide titled: *Import and attach documents in bulk via document importer - configuration option*

Preferred suppliers view update (suppliers 'on hold')

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

When selecting a contractor for a works order and the landlord has preferred suppliers set-up, those that are available and those that are 'on hold' are clearly displayed - an 'on hold' supplier cannot be selected for the works order

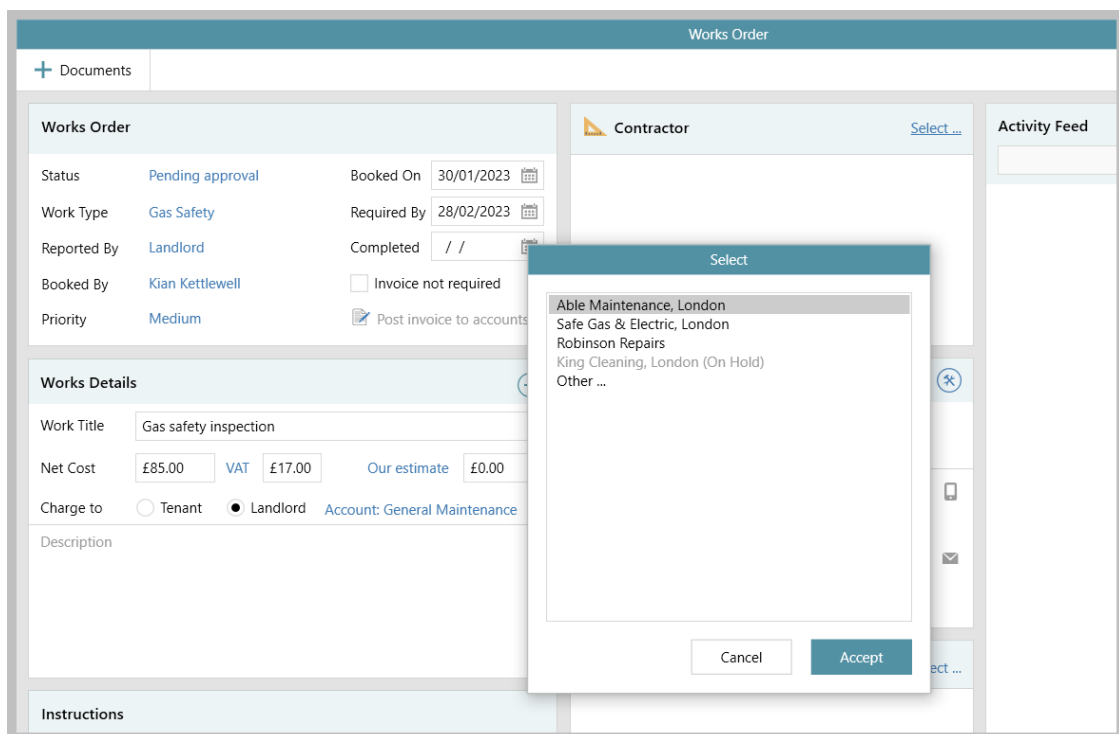
'On hold' supplier functionality is a configuration option introduced in AgencyCloud 12.155 - for more information, see Knowledge Base guide titled: *Put supplier 'on hold' - configuration option*

For more information on setting up preferred suppliers, see Knowledge Base guide titled: *Set up preferred suppliers*

Add contractor to works order

From works order, Contractor panel:

- Click **Select**
- The landlord's preferred suppliers list is displayed, any suppliers who are on hold are clearly indicated and cannot be selected



Allow specific certificate types to have no expiry date - 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 details of specific certificate types to be entered with no expiry date - this applies to a lettings property or estate (when using block management)

This configuration option is useful for certificate types where an expiry date is not applicable

To enable this configuration option, contact Reapit Support

When contacting Reapit Support to request configuration, they will also require details of which certificate types can be entered without an expiry date

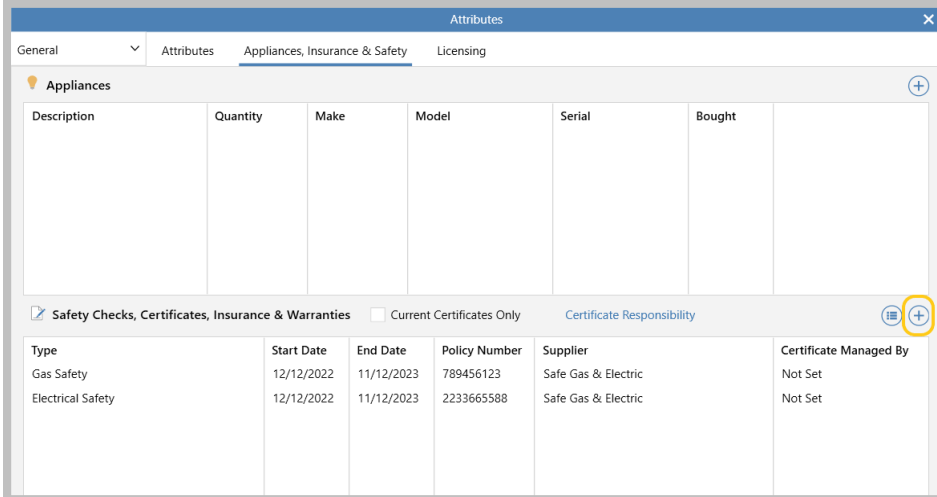
Gas Safety & Electrical Safety types cannot be set without an expiry date

See next page

1. Enter certificate detail

From a lettings property or block management estate:

- Click **Certificates**
- In certificates panel, click  to add a new certificate

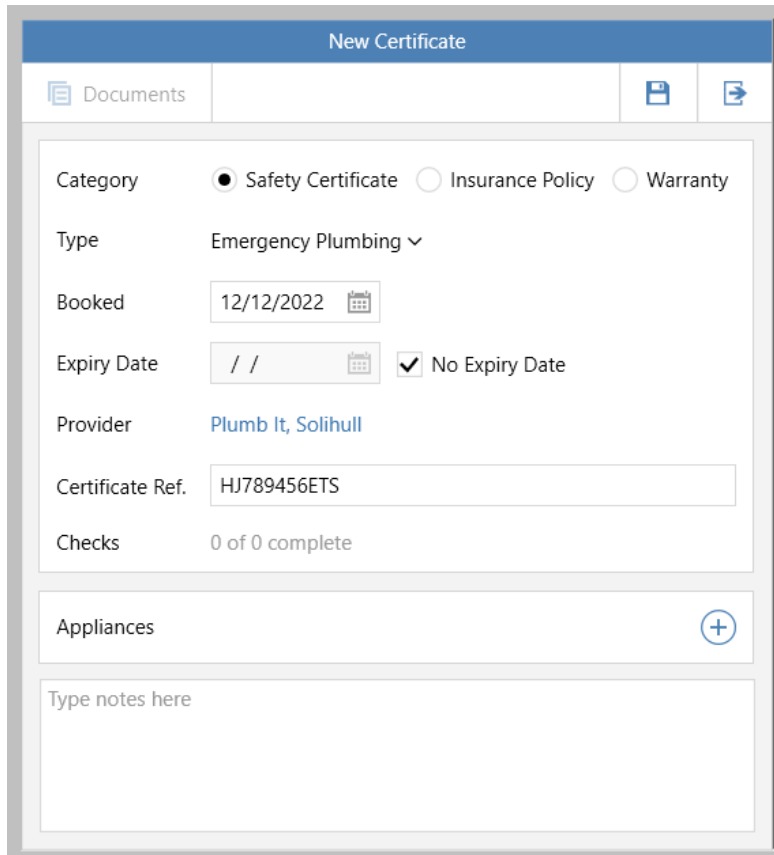


The screenshot shows the 'Attributes' window with the following sections:

- Appliances:** A table with columns: Description, Quantity, Make, Model, Serial, Bought.
- Safety Checks, Certificates, Insurance & Warranties:** A table with columns: Type, Start Date, End Date, Policy Number, Supplier, Certificate Managed By. A plus icon in the bottom right corner is circled in yellow.

Type	Start Date	End Date	Policy Number	Supplier	Certificate Managed By
Gas Safety	12/12/2022	11/12/2023	789456123	Safe Gas & Electric	Not Set
Electrical Safety	12/12/2022	11/12/2023	2233665588	Safe Gas & Electric	Not Set

- Enter certificate detail - when choosing a certificate **Type** that is set-up to not require an expiry date, the **No Expiry Date** option is made available and, when ticked, the **Expiry Date** field is greyed out



The 'New Certificate' form contains the following fields:

- Category:** Safety Certificate Insurance Policy Warranty
- Type:** Emergency Plumbing
- Booked:** 12/12/2022
- Expiry Date:** / / No Expiry Date
- Provider:** Plumb It, Solihull
- Certificate Ref.:** HJ789456ETS
- Checks:** 0 of 0 complete
- Appliances:** +
- Notes:** Type notes here

If a certificate is set with No Expiry Date (as above), it will not get included in the associated certificates due to expire list on the Organiser Property Management panel

Initial end date stored on tenancy

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

At the point of changing a tenancy status from *arranging* to *current*, an initial end date is stored on the tenancy - even if the tenancy end date is changed, the initial end date is always stored and can then be used for reporting purposes (e.g. to report on tenancy duration)

The initial end date can be seen on the tenancy screen and is also logged in the Activity Feed - it usually cannot be changed - see note below

A configuration option is available which provides permitted users with the ability to change the initial end date - *to enable this configuration option, contact Reapit Support*

Reporting options that use the initial end date will be available in future releases of AgencyCloud

1. View initial tenancy end date

From current tenancy:

- Hover over the **Tenancy end date** - a pop-up is displayed showing the **Initial end date**
The current end date is also shown
Any changes to the initial end date are logged in the Activity Feed, shown below

The screenshot displays the AgencyCloud interface for a tenancy. The top navigation bar includes tabs for Details, Financial & Renewals, Agreement, Pre-Tenancy, Management, and Post-Tenancy. The main content area is divided into several sections:

- Property:** 87 Bridgeman House, Kensington
- Landlord:** Miss Sophie Devereaux
- Main Tenant:** [R] Mr T Bayliss
- Status:** Tenancy Current
- Type:** Assured Shorthold
- Role:** Managed tenancy
- Tenancy start:** 17/03/2021
- Tenancy end:** 16/03/2022
- Rent:** £2
- Fees:** Letting: 10% Management: 6%
- Relationships:** Key Contact: Kian Kettlewell, Office: London
- Activity Feed:** A list of recent activities, including "Initial end date changed to 16/03/2022" and "Status of tenancy changed from Arranging Tenancy to Tenancy Current with Mr T Bayliss for 87 Bri...".

A tooltip is visible over the "Tenancy end" date, showing the "Initial end date: 16/03/2022" and the date "Wednesday, 16 March 2022".

The initial end date is taken from the **Tenancy end** date at the point that the tenancy moved from the **Status of Arranging Tenancy to Tenancy Current**

2. Change initial end date (where allowed)

The initial end date can only be changed when a user has been given the necessary security permissions via configuration - see note at the top of this guide for more information

From current (or finished) tenancy:

- Right-click over **Tenancy end** and select **Update initial end date**

The screenshot shows a tenancy management interface for 'Mr T Bayliss - 87 Bridgeman House, Kensington, W14 8QA - Registered 18/03/2016'. The interface has tabs for 'Details', 'Financial & Renewals', 'Agreement', 'Pre-Tenancy', 'Management', and 'Post-Tenancy'. The 'Details' tab is active, showing property and landlord information. On the right, there are fields for 'Status' (Tenancy Current), 'Type' (Assured Shorthold), and 'Role' (Managed tenancy). Below these are 'Tenancy start' (17/03/2021) and 'Tenancy end' (16/03/2022) fields. A dropdown menu is open over the 'Tenancy end' field, showing options: 'Set to 6 months', 'Set to a year', and 'Update initial end date'. The 'Update initial end date' option is highlighted. Other fields include 'Rent' (£2,820), 'Fees' (Letting), and 'Key Contact' (Kian Kettlewell).

- Enter revised initial end date and click **Accept**

The screenshot shows a dialog box titled 'Enter Date'. It contains a label 'Initial end date' followed by a date input field containing '16/09/2022' and a calendar icon. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Accept'.

- The **Initial end date** is updated and shown when hovering over the **Tenancy end** date field. It is also logged in the **Activity Feed** on the tenancy.

Mr T Bayliss - 87 Bridgeman House, Kensington, W14 8QA - Registered 18/03/2016 - LON160005

Renewals Agreement Pre-Tenancy Management Post-Tenancy Letters Print

87 Bridgeman House, Kensington

Sophie Devereaux

0346 0631

0900679

s@devereaux.com

Not Entered

T Bayliss

0900798

Status: Tenancy Current

Type: Assured Shorthold

Role: Managed tenancy

Tenancy start: 17/03/2021 Periodic

Tenancy end: 16/03/2022 End confirmed

Rent: £
 Wednesday, 16 March 2022
 Initial end date: 16/09/2022

Fees: Letting: 10% Management: 6%

Relationships

Activity Feed

Type to filter activity

- Initial end date changed from 16/03/2022 to 16/09/2022. A moment ago by Kian Kettlewell
- Tenant added: Mrs Gina Bellman (LON16000003). 1 hour ago by Kian Kettlewell
- Tenant added: Miss Amelia Wright (LON15000028). 1 hour ago by Kian Kettlewell
- Initial end date changed to

The initial end date being logged applies to tenancies whose status changed from arranging to current when using AgencyCloud 12.160+

Next inspection date on tenancy matches date on inspection schedule - 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 ensures that the next inspection date that is shown on the Management tab of a tenancy is the next inspection date from the inspection schedule screen

With the configuration setting off (i.e. the default behaviour):

the number of days set on the tenancy Management tab in **Regular frequency*** is added to the previous inspection appointment date booked

With the configuration setting enabled:

the number of days set on the tenancy Management tab in **Regular frequency*** is taken from the inspection schedule's **Inspection Due** date instead

The inspection schedule calculates the inspection due date from the start of the tenancy and, while it still uses the regular frequency setting on the tenancy, the due date never changes regardless of when the inspection appointments took place

**and initial inspection frequency (where configured)*

To avoid a difference between the dates shown on both screens, this configuration option can be used to ensure that the next inspection date shown on the tenancy is the same as the due date shown in the inspection schedule

To enable this configuration option, contact Reapit Support

For more information on property inspection schedule functionality, see Knowledge Base guide titled: *Property inspection schedule overview*

With the configuration setting enabled:

- The **Next** inspection date matches the **Inspection Due** date on the inspection schedule, as it is calculated from the tenancy start date (rather than the date of the last inspection appointment)

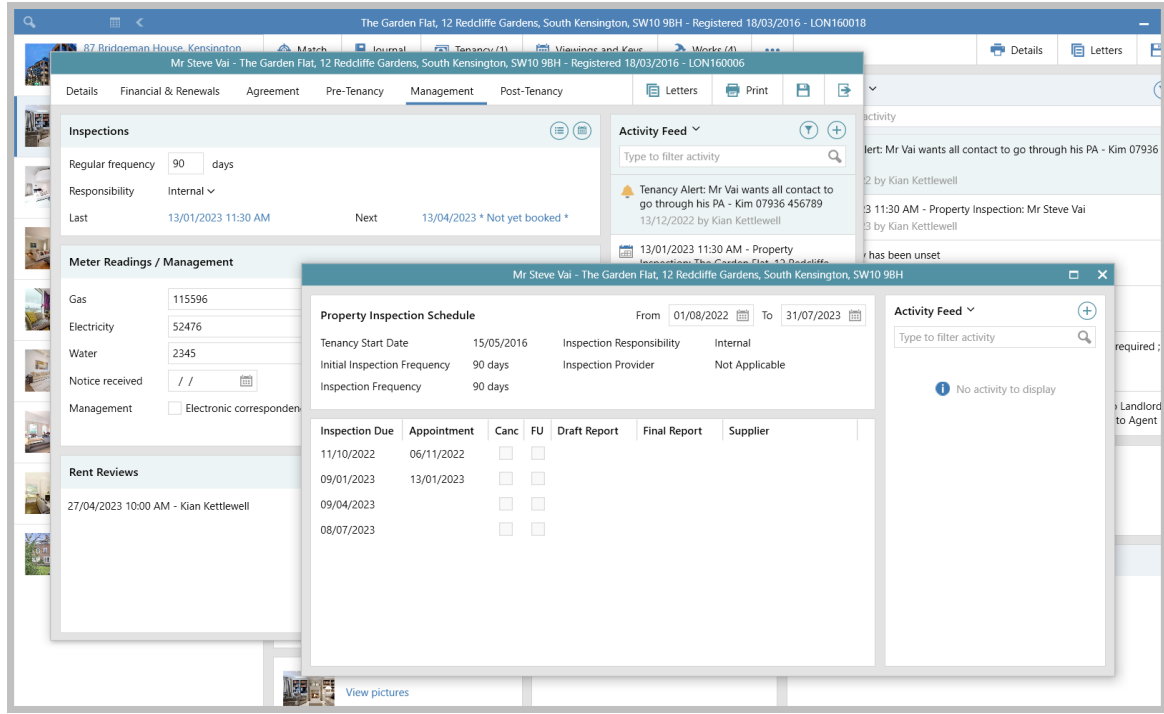
The screenshot displays the Reapit software interface for a tenancy. The main window shows the 'Management' tab for 'Mr Steve Vai - The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH'. The 'Inspections' section shows a 'Regular frequency' of 90 days and a 'Next' inspection date of 09/04/2023, which is circled in yellow. An 'Activity Feed' window is also visible, showing a 'Tenancy Alert'.

Overlaid on this is the 'Property Inspection Schedule' window, which shows a table of inspection dates. The 'Inspection Due' date for 09/01/2023 is circled in yellow, matching the 'Next' date in the main window.

Inspection Due	Appointment	Canc	FU	Draft Report	Final Report	Supplier
11/10/2022	06/11/2022	<input type="checkbox"/>	<input type="checkbox"/>			
09/01/2023	13/01/2023	<input type="checkbox"/>	<input type="checkbox"/>			
09/04/2023		<input type="checkbox"/>	<input type="checkbox"/>			
08/07/2023		<input type="checkbox"/>	<input type="checkbox"/>			

With the configuration disabled (default):

- The **Next** inspection date is calculated by adding the number of days set in the **Regular frequency** field to the previous inspection appointment date, which can make it differ to the date shown in the inspection schedule



In the example above, the inspection was scheduled for 09/01/2023 but the appointment took place on 13/01/2023 - 4 days later than scheduled

When the configuration is off

The **Next** date on the tenancy **Management** screen is shown as 90 days since the last appointment date (which is 13/04/2023) but the **Inspection Due** date on the inspection schedule is calculated as 90 days since the last inspection due date (which is 09/04/2023) - resulting in differing dates being shown on the two screens

When the configuration is on

The **Next** date on the tenancy **Management** screen shows the **Inspection Due** date taken from the inspection schedule - therefore both screens show 09/04/2023

Renewal option expiry column in tenancy/renewal organiser & report grids

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

For clarity, the previously titled **renewal expiry** column is now shown as **renewal option expiry** - this column is available in tenancy and renewal grids seen via the organiser and tenancy/renewal reports

This applies when using the configuration option which allows a renewal option expiry date to be set, as outlined in Knowledge Base guide titled: *Expiry date on agreement renewal options on tenancy/renewal screens - configuration option*

Renewal grid example

- The **Renewal Option Expiry** column shows the date the renewal option expires

Current Rent...	Rent Incre...	Tenancy role	Negotiator	Checks	Renewal Option Expiry	Renewal Option
£15,208.33	0%	Managed tena...	Reapit	3 of 4 complet...		Rent review clause
£3,606.55	0.6%	Managed tena...	Kian Kettle...	4 of 4 complete	27/01/2023	Further Option to Renew
£8,690.48	5%	Managed tena...	Reapit	1 of 4 complet...		Conditional Right to Renew
£3,910.71	2.28%	Managed tena...	Kian Kettle...	4 of 4 complete		Conditional Right to Renew
£3,476.19	0%	Managed tena...	Kian Kettle...	2 of 4 complete	30/03/2023	Further Option to Renew
£5,214.29	0%	Letting only	Kian Kettle...	3 of 4 complete	10/04/2023	Further Option to Renew

Filters: Days since last update

Negotiator

Accounts*

Do not cancel Direct Debit when changing bank details - 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 ensures that when changing a tenant's bank details, a cancel instruction is not sent to the Direct Debit Run

To enable this configuration option, contact Reapit Support

For more information on Direct Debit functionality in AgencyCloud, see Knowledge Base guide titled: *Using Direct Debit functionality*

Block Management**

Works order reporting available for Block Management estates

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

When using Block Management functionality, an option to filter works order reports to only show block management estates is available via an estates criteria option

Once selected, this offers further criteria to filter the estates works orders

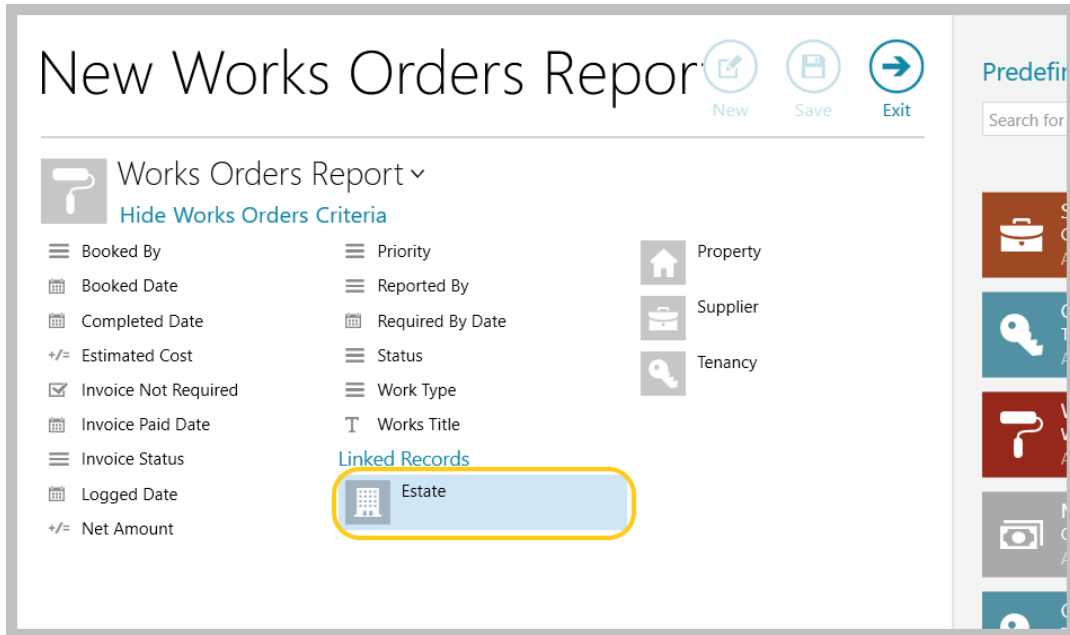
See next page

1. Works order linked records option & criteria

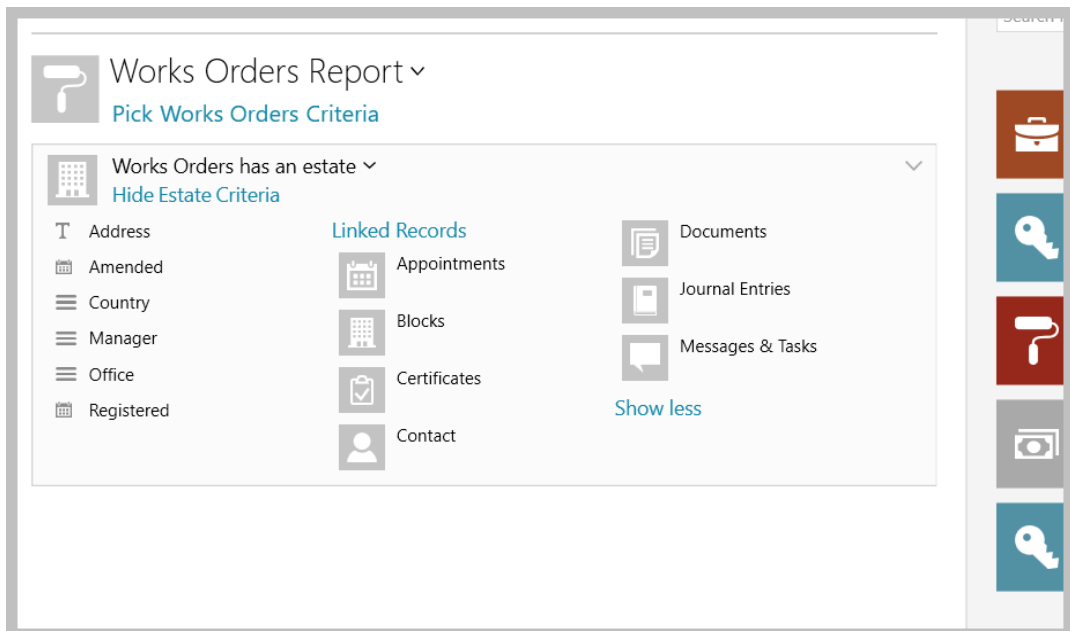
From Power Reports screen:

- Select **Works Orders** as the report type
- In **Linked Records** section, select **Estate**

This will filter the report results to show works orders for Block Management estates only



- This criteria option offers further estate criteria which can also be applied to filter the report



2. Example report

This report will return works orders for estates only that were booked this week and where the current user is the estate Key Contact/manager

Works Orders Report ▼

[Pick Works Orders Criteria](#)

Booked Date ▼ This Week ▼ (30/01/2023 to 05/02/2023) ×

Works Orders has an estate ▼

[Hide Estate Criteria](#)

Address	Blocks	Messages & Tasks
Manager ▼ <input checked="" type="checkbox"/>	Certificates	
Office	Contact	Show more ...
Registered	Journal Entries	

[Linked Records](#)

Appointments	
--------------	--

Manager ▼ Morven McCormick ×

[Run Report](#)