Reapit AgencyCloud 12.161 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

New UI round-up: v12.161

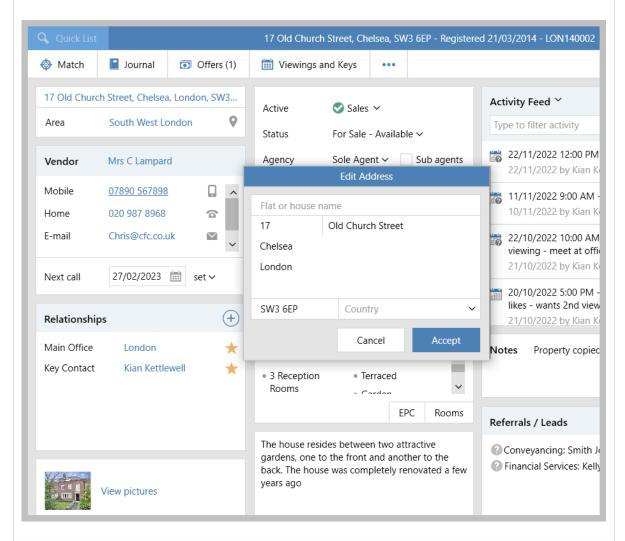
This guide has been reviewed against our global client base and classed as relevant to all regions

As part of the new user interface (UI) project, in 12.161 the following screen has been redesigned to bring it in line with previously redesigned screens

The edit address screen, seen when clicking an address shown in one line, now uses the new UI format - all existing functionality exists but with a refreshed look and feel

When a property address is shown in one line:

- · Click property address to view/edit
- The edit address screen is shown



The property address is shown in one line when the AgencyCloud window too small to show the address in multiple lines

Sales & lettings/rentals

Further enhancements to Organiser efficiency - configuration options

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

A configuration option was added in AgencyCloud 12.160 to provide better performance when loading the Organiser, this was achieved by not including shared contacts in the My Contacts list, as outlined in the Knowledge Base guide titled: *Organiser efficiency enhancement - configuration option*

From AgencyCloud 12.161, further work has been carried out:

- The functionality covered by the configuration added in 12.160 has been extended meaning that, when enabled, shared contacts are not shown in *any* Organiser list where contact records are required
- A second configuration option is available when enabled, shared applicants are not included in any
 Organiser list where applicant records are required (i.e. Active Applicants, Applicants to Call & Applicants to
 Remove lists)

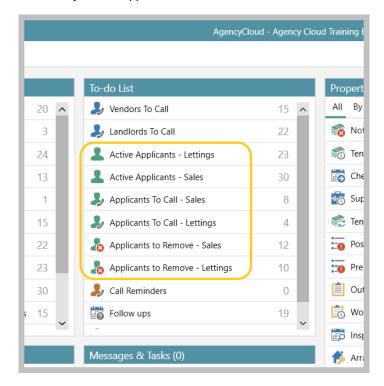
These configuration options are useful to enable on a system where the Organiser is slow to load and where shared contacts and/or applicants do not need to be included in Organiser lists

To enable this configuration option, contact Reapit Support

1. Applicant lists on Organiser

From Organiser, Overview/To-do List panels:

With the configuration enabled, Active Applicants, Applicants to Call & Applicants to Remove will not
include any shared applicants

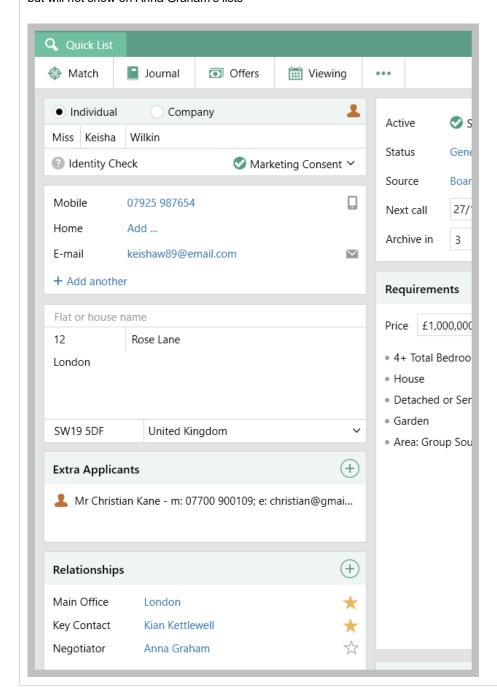


2. What is a shared applicant?

A shared applicant 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 applicant will show in Kian Kettlewell's applicant lists on the Organiser, but will not show on Anna Graham's lists



For information on shared contacts, see Knowledge Base guide titled: Organiser efficiency enhancement - configuration option

Set default tenancy agreement clauses - 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 default tenancy agreement clauses to be set on the landlord and/or property record which are then automatically transferred to any new tenancy

A further configuration is available which transfers clauses set on the tenancy to a renewal negotiation agreement - when subsequent negotiations are created for the tenancy, the clauses set on the previous negotiation are inherited for the new negotiation

This functionality benefits the user so that, when adding new tenancies and renewals, the landlord terms of business do not need to be referred to and/or re-entered each time, helping to ensure greater efficiency

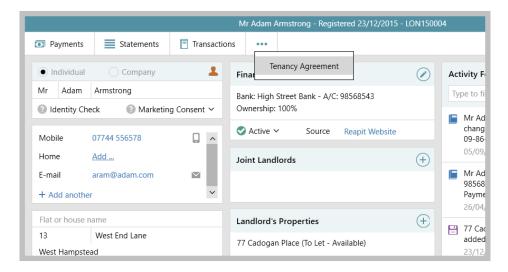
To enable this configuration option, contact Reapit Support

1. Set landlord agreement clauses

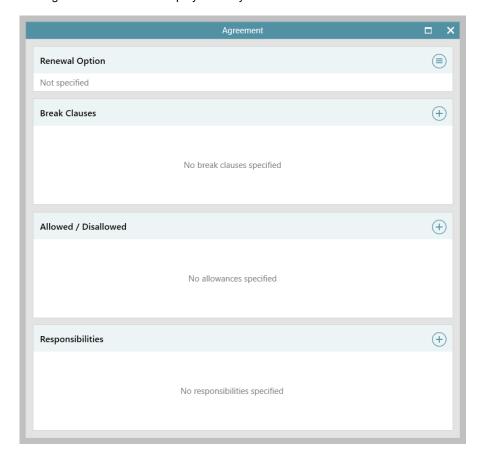
Any clauses set at landlord level will be automatically inherited by the landlord's properties and any new tenancy or renewal created for the landlord

From landlord:

Click ellipsis ... (top left) and select Tenancy Agreement

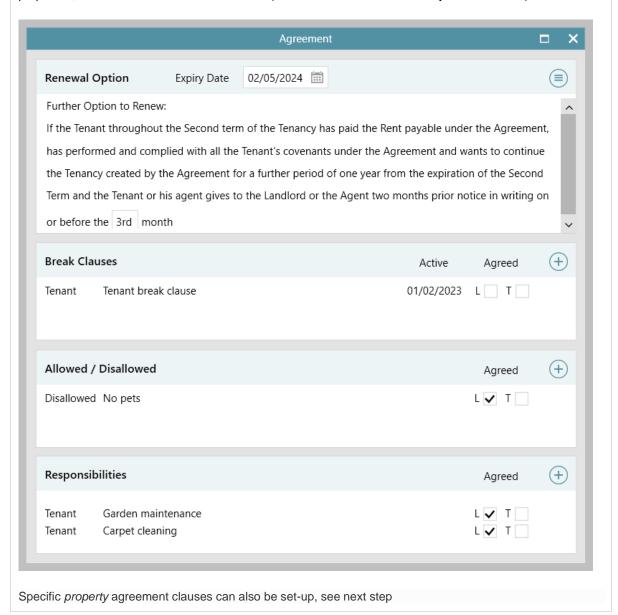


• The Agreement window is displayed ready for relevant clauses to be added for the selected landlord



Example

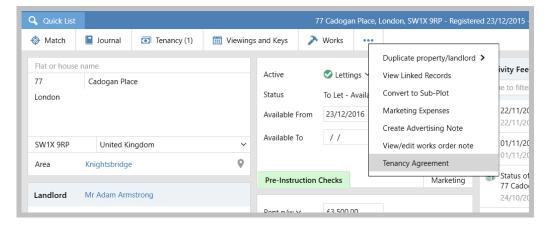
The landlord default agreement clauses have been set up, these clauses will be inherited by the landlord's properties, tenancies and for the initial renewal (and can also be added to at any of those levels)



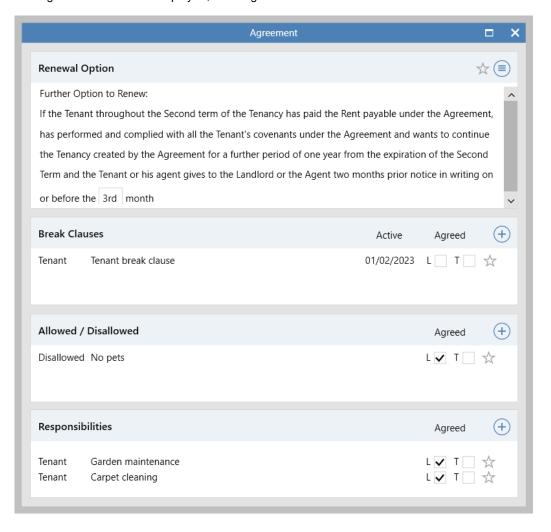
2. Set property agreement clauses

Property-specific agreement clauses can also be added in addition to the inherited landlord clauses From property:

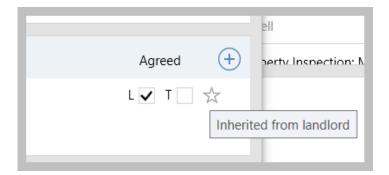
• Click ellipsis ... (top left) and select Tenancy Agreement



• The Agreement window is displayed, showing inherited landlord clauses



• Clauses shown with a star indicate that it is an inherited clause Hovering over the star shows which level the clause has been taken from



Click to add further clauses
 Any clause added at property level is displayed without a star



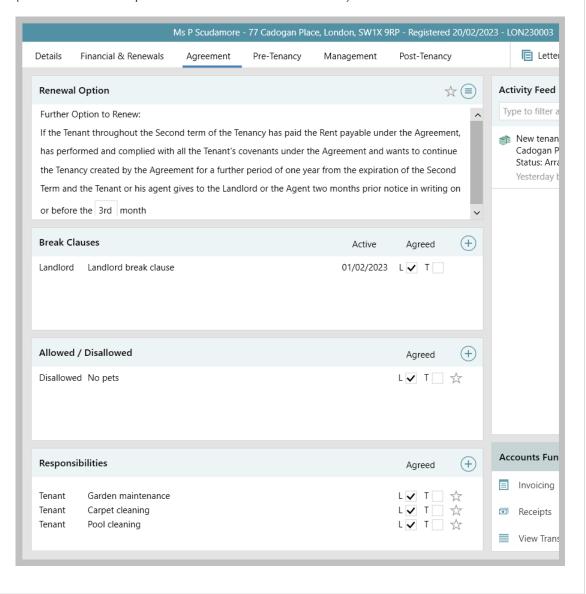
To avoid duplicate clauses being added, landlord inherited clauses cannot be removed at property level - however, any clause can be removed at tenancy or renewal level (see steps 3 - 4)

3. Set tenancy level agreement clauses

When adding a new tenancy, inherited agreement clauses will be displayed Clauses can be inherited from the landlord and/or property (as described in steps 1 & 2)

From tenancy:

- Click Agreement tab
- Inherited clauses are displayed and indicated by a star
 Hovering over the star shows which level the clause has been taken from a grey star indicates that
 merge fields are incomplete (shown in step 4)
- Clauses can be added, changed or removed, as required
- Any new clauses added on the tenancy are shown without a star icon (as shown in the example below in the Break Clauses section)

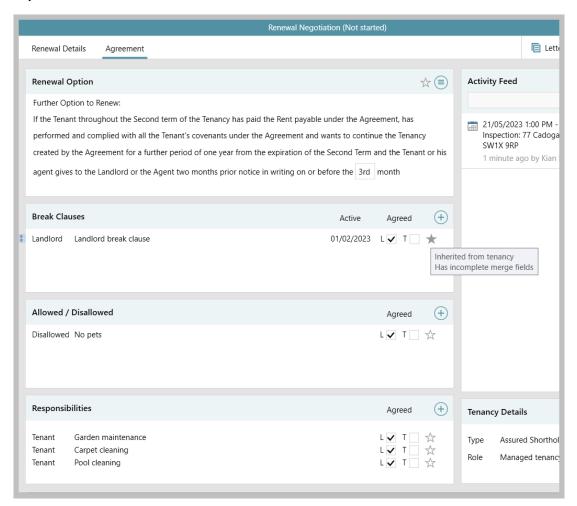


4. Set renewal agreements clauses

When creating a renewal negotiation on a tenancy, the renewal agreement will inherit all of the clauses set on the tenancy - therefore this could include clauses set at landlord, property and tenancy agreement levels

Initiate the renewal negotiation, as usual:

- From Renewal Negotiation, click Agreement
- As seen on previous screens, inherited clauses are displayed and indicated by a star
 Hovering over the star shows which level the clause has been taken from
 (a grey star indicates that merge fields are incomplete)
- Clauses can be added, changed or removed, as required
- Any new clauses added on the renewal are shown without a star icon



For the first renewal on a tenancy, the renewal agreement will inherit all of the clauses set on the tenancy however, for any subsequent renewal, only the clauses set on the previous renewal agreement will be inherited

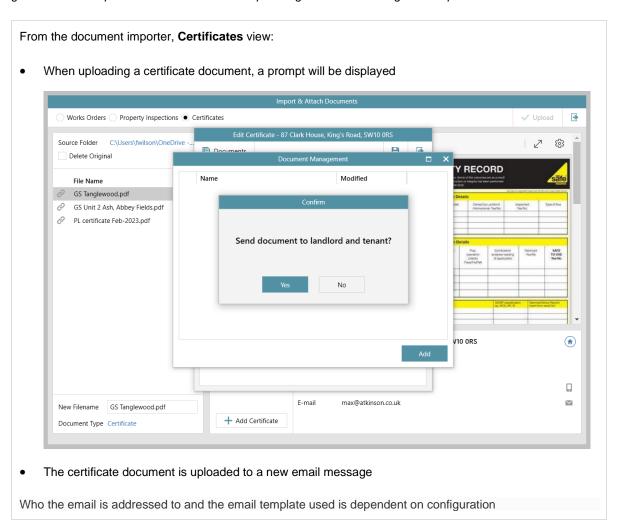
For example: if all of the above clauses were removed on the first renewal and new ones added, only the new clauses will be inherited on the second renewal agreement

Document importer - prompt to email certificate when uploading document

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

When the configuration option is enabled which provides a prompt to email certificate details when uploading a certificate document, this prompt will also be presented when uploading a certificate document using the document importer

More information on the configuration option required for this functionality is outlined in the Knowledge Base guide titled: *Prompt to email certificate when uploading document - configuration option*



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

Update to supplier checklist functionality

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

From AgencyCloud 12.161 onwards, supplier checklist functionality no longer requires the supplier approval process to be enabled in order to use it

For more information on supplier checklist functionality (introduced in AgencyCloud 12.158), see Knowledge Base guide titled: *Supplier checklist - configuration option*

Transfer data between users - additional role-specific transfer options added

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

When set up with access to the Negotiator and User Setup screen to manage AgencyCloud users, the option to transfer data between users to allow records to be passed from one user to another, depending on the role of the user, has been expanded - with additional options being added to allow more role-specific transfers to be used

This function is normally used when a member of staff leaves or their job role changes

For example, if a user is no longer carrying out any renewals responsibilities and one specific member of staff is taking this role on, the transfer tool can now be used to transfer all the selected users current active renewal negotiations to the relevant staff member

A key contact can request access to the Negotiator and User Setup screen by contacting Reapit Support

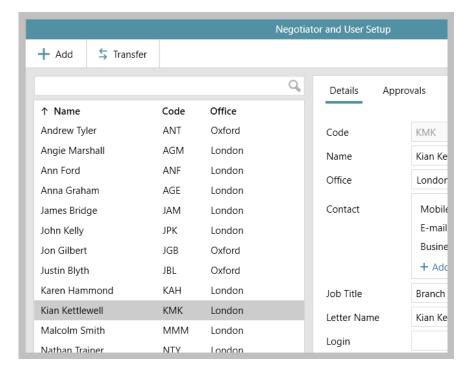
This addition to AgencyCloud 12.161 is useful to be aware of as, even if you do not have access to the Negotiator and User Setup screen, the options outlined below are available to Reapit Support to allow them to transfer your user data when staff members leave or change job role

1. Initiate transfer

Use the Negotiator and User Setup screen initiate the transfer as usual

From Negotiator and User Setup:

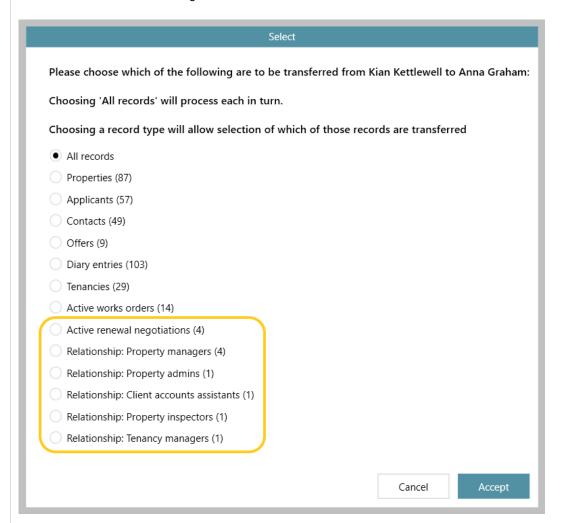
- · Select user to transfer records from
- Click **Transfer** (top left)
- Select the negotiator to transfer their records to and click Select



The screen shown in step 2 is displayed

2. Select roles

When only some of the selected user's records are to be transferred, this screen allows you to specify which records are transferred according to the role of the selected user



From AgencyCloud 12.161+, the following 6 new roles/relationships have been added to this screen for selection:

- Active renewal negotiations: transfers records belonging to the selected user where they are identified as the Negotiator on an active renewal negotiation
- Relationship: Property managers: transfers records belonging to the selected user where they are identified as the Property Manager (via the property Relationships panel)
- Relationship: Property admins: transfers records belonging to the selected user where they are identified as the Property Administrator (via the property Relationships panel)
- Relationship: Client accounts assistants: transfers records belonging to the selected user where they are identified as the Client Accounts Assistant (via the property Relationships panel)
- **Relationship: Property inspectors**: transfers records belonging to the selected user where they are identified as the Property Inspector (via the tenancy Relationships panel)
- Relationship: Tenancy managers: transfers records belonging to the selected user where they are identified as the Tenancy Manager (via the tenancy Relationships panel)

For more information on using the Negotiator and User Setup screen to manage users and to transfer data between users, see Knowledge Base guide titled: Adding a new user, removing a user and transferring data between users

Accounts*

Holding deposit functionality update

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

When using holding deposit functionality, the number of days that a holding deposit has been held for is now calculated from the date the most recent deposit payment was made, rather than it being calculated from when the payment was processed

This provides a more accurate picture of how long the holding deposit has been held for

More information on holding deposit functionality is available in the Knowledge Base guide titled: *Holding deposit - configuration option*

Block Management**

Block Management Power Report updates

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

In AgencyCloud 12.161, various updates have been made to enhance Power Reporting functionality for Block Management

Updates include:

- 1. Estate criteria new options are available
- 2. Report results grid:
 - a. Additional columns can be added to the grid
 - b. Extra export options are available via a right-click

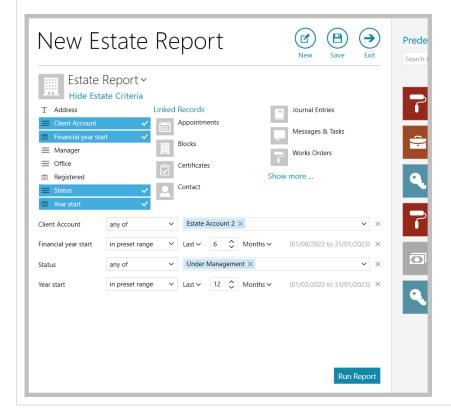
All the above additions are explained below

1. Estate criteria

When choosing to run an Estate Report, new criteria options have been added to allow you to filter the report results, as follows:

- Client Account: select specific account(s) to report on or exclude from your report
- Financial year start: report within a specific date range
- Status: select specific status type(s) to report on or exclude from your report
- Year start: report within a specific date range

The screen below shows all new options selected plus example criteria that can be chosen



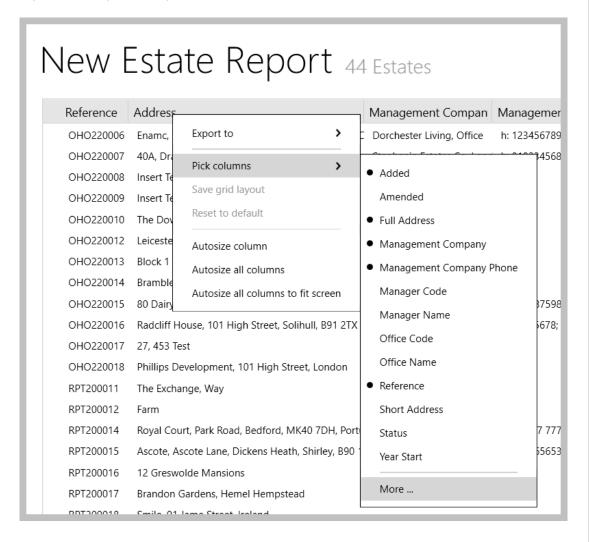
2. Report results grid

a. Additional columns can be added to results grid

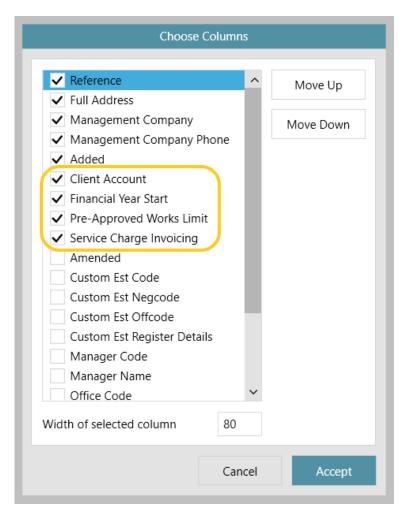
Additional columns are available to be added to the report results grid

From the report results grid:

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



• The following new columns are available: Client Account, Financial Year Start, Pre-Approved Works Limit and Service Charge Invoicing



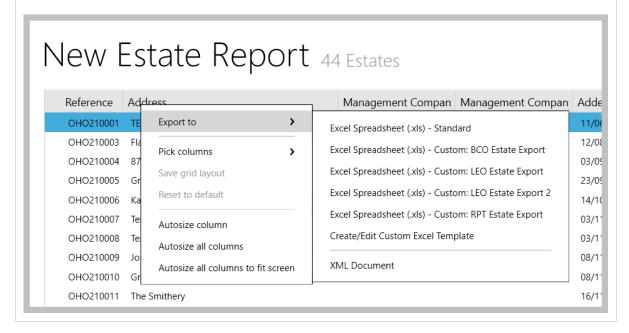
• Select required column, use **Move Up/Down** options to re-order the columns and click **Accept**To ensure the columns are shown for all future estates reports, right-click over the grid headings again
and select **Save grid layout**

b. Extra export options are available via a right-click

Options for exporting report results have been expanded to include being able to export to a custom grid

From the report results grid:

- Right-click over grid headings and select Export to
- As well as being able to export to a Standard Excel spreadsheet or XML Document, custom templates
 can now be selected and new custom templates created/edited



Block Management grid option enhancements - configuration options

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

Configuration options are available for Block Management grids, seen when searching and reporting

These options include:

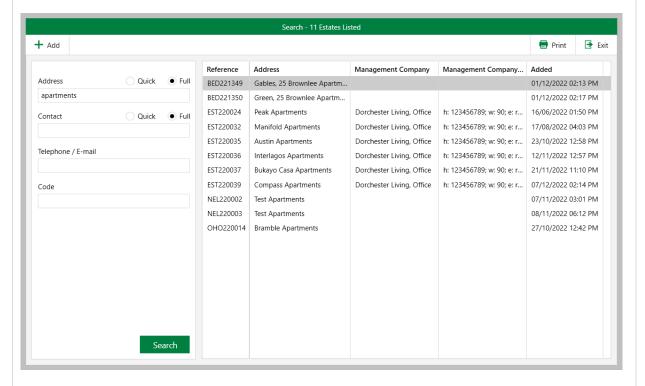
- 1. Default and/or custom grid columns can be set for search and/or report result grids
- 2. Dynamic background colour options are available for a grid entry that matches specific criteria

To enable any/all of these configuration options, contact Reapit Support

1. Default/custom grid columns in search/report result grids

After searching:

- Columns shown in the grid are the default options
- Configuration options allow the columns to be added to/changed for all users
- Default and/or custom columns can be added



All of the above can also be set-up for grids seen after running a report

2. Dynamic background colour options

When viewing estates in grids:

- Items in grids that match specific criteria can be shaded to highlight the record(s)
- In this example, records with EST22 in their reference are shaded

New Estate Report 35 Estates Reference Address Management Compan | Management Compan | Manager Added EST210001 45 Grantham Mews Leon Graham 09/09/2021 10:52 A EST210004 Balmoral Hills Dorchester Living, Office h: 123456789; w: 90; e: rptr Leon Graham 16/09/2021 08:09 A EST210006 Plainview Estate Horace Management Hold b: 768587598678; Leon Graham 06/10/2021 02:26 P Horace Management Hold b: 768587598678; Leon Graham 08/10/2021 03:46 P EST210009 111 EST210010 The Brambles Dorchester Living, Office h: 123456789; w: 90; e: rpti Leon Graham 17/10/2021 10:41 P Franklins Solicitors, Northa b: 01604 828 282; Leon Graham 04/11/2021 04:20 P EST210016 Rafferty Reef EST220001 Curbar Village Dorchester Living, Office h: 123456789; w: 90; e: rptr Leon Graham 18/01/2022 08:10 A EST220002 April Heights, Amersham Heights, Winchmore Hill, Horace Management Hold b: 768587598678; Leon Graham 18/01/2022 09:57 A Dorchester Living, Office h: 123456789; w: 90; e: rptr Leon Graham 18/01/2022 12:59 P EST220003 Montevideo Mansions EST220005 Grenoble Green, Balsall Common, Solihull, West M Dorchester Living, Office h: 123456789; w: 90; e: rptr Leon Graham 20/01/2022 08:03 A

For more information on using Block Management, see Knowledge Base section titled: Block Management