

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

System performance updates

Various performance related enhancements have been made in AgencyCloud 12.161 to ensure that general background & specific Client Accounts processes* run more efficiently, resulting in improved system performance (depending on size of system)

System performance enhancements are on-going and have been a feature in AgencyCloud in recent releases. Other recent areas/processes to have been updated for efficiency include the Organiser and loading of Rent Run, Receipts From Statement and Chase Arrears along with various other generic background Client Accounts indexing processes.

*namely Bank Statement Import & Landlord Payment Run processes

New UI round-up: v12.161

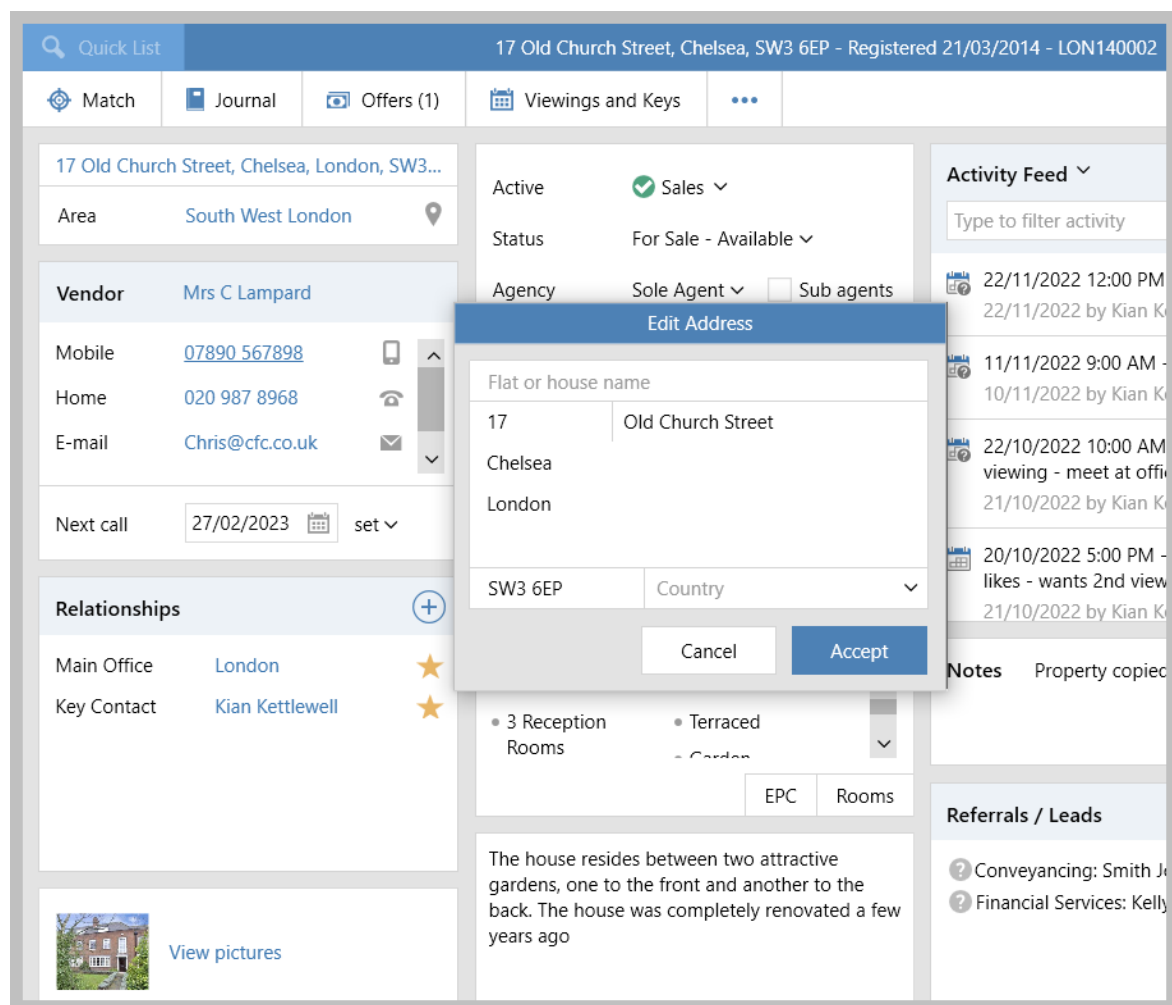
This guide has been reviewed against our global client base and classed as relevant to all regions

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)

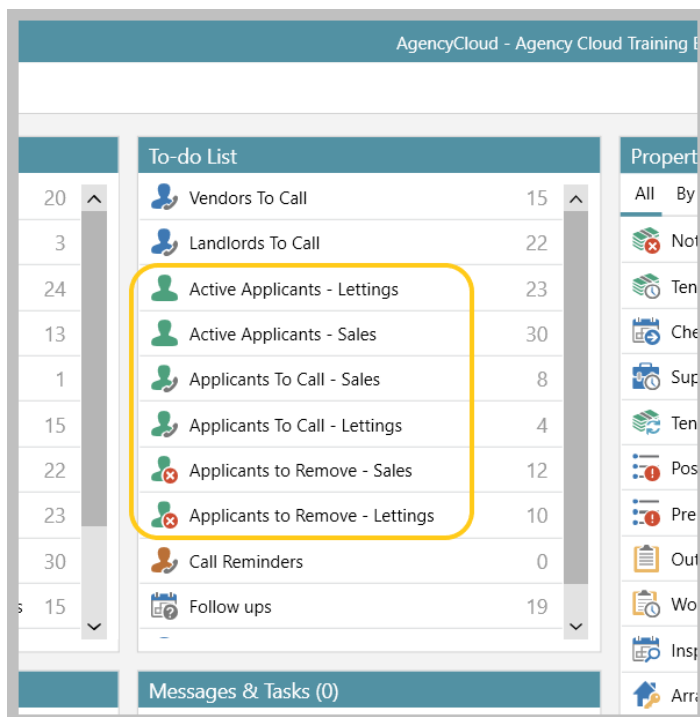
These configuration options are useful to enable on a system where the Organiser is slow to load and where shared contacts and/or applicants do not need to be included in Organiser lists

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

The screenshot displays the contact record for Miss Keisha Wilkin. The interface includes a top navigation bar with 'Quick List' and tabs for 'Match', 'Journal', 'Offers', and 'Viewing'. The contact details are as follows:

- Individual** (selected) / Company
- Name: Miss Keisha Wilkin
- Identity Check: ? (checked)
- Marketing Consent: ✓ (checked)
- Mobile: 07925 987654
- Home: Add ...
- E-mail: keishaw89@email.com
- Flat or house name: 12 Rose Lane, London, SW19 5DF, United Kingdom
- Requirements: Price £1,000,000, 4+ Total Bedrooms, House, Detached or Semi-detached, Garden, Area: Group South
- Extra Applicants: Mr Christian Kane - m: 07700 900109; e: christian@gmail.com
- Relationships:
 - Main Office: London (★)
 - Key Contact: Kian Kettlewell (★)
 - Negotiator: Anna Graham (☆)

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

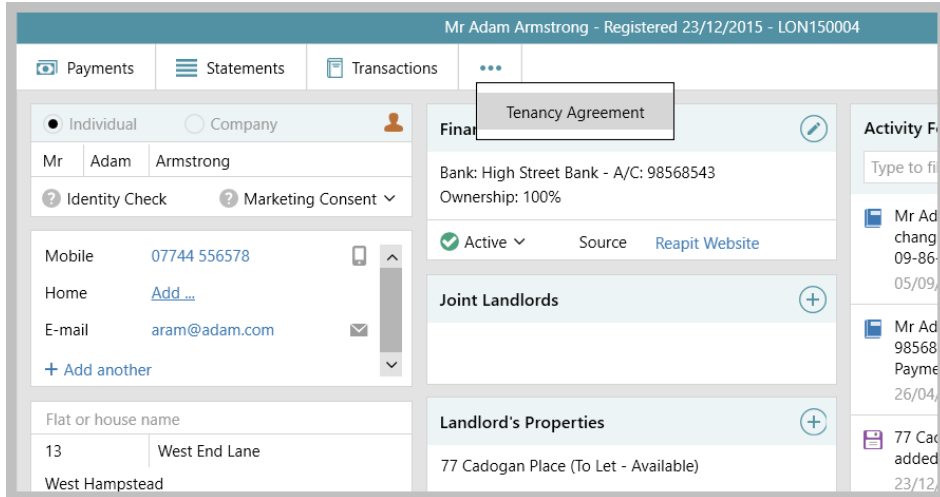
To enable this configuration option, contact Reapit Support

1. Set landlord agreement clauses

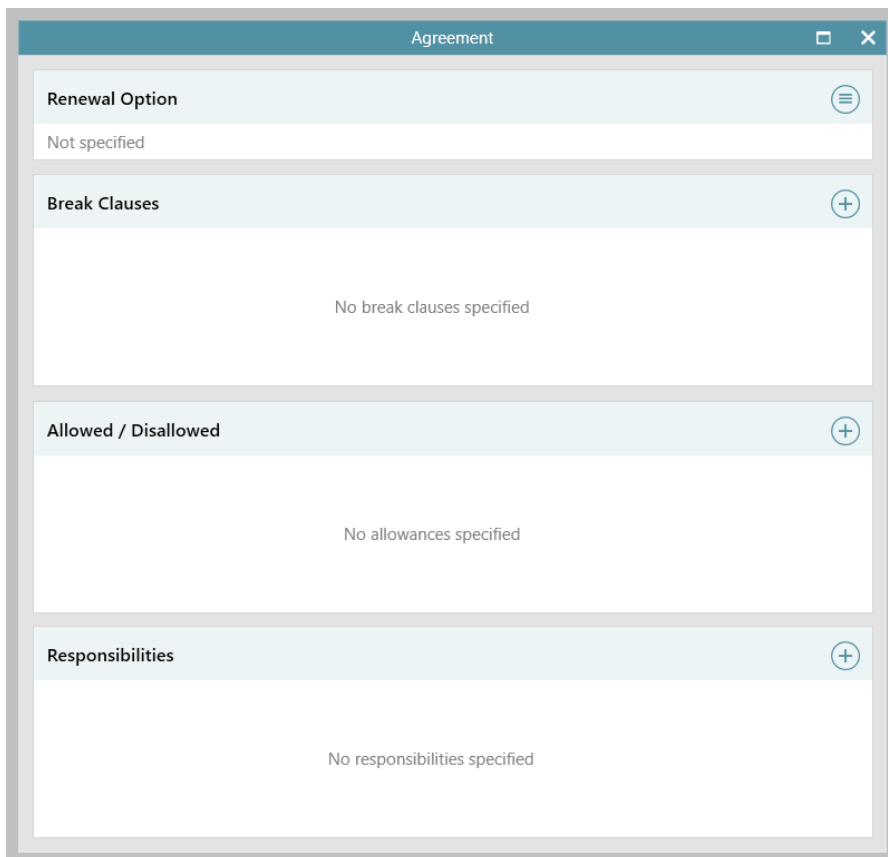
Any clauses set at landlord level will be automatically inherited by the landlord's properties and any new tenancy or renewal created for the landlord

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)

Agreement□ ×

Renewal OptionExpiry Date

02/05/2024

☰

Further Option to Renew:

If the Tenant throughout the Second term of the Tenancy has paid the Rent payable under the Agreement, has performed and complied with all the Tenant's covenants under the Agreement and wants to continue the Tenancy created by the Agreement for a further period of one year from the expiration of the Second Term and the Tenant or his agent gives to the Landlord or the Agent two months prior notice in writing on or before the month

Break ClausesActiveAgreed⊕

Tenant	Tenant break clause	01/02/2023	L <input type="checkbox"/> T <input type="checkbox"/>
--------	---------------------	------------	---

Allowed / DisallowedAgreed⊕

Disallowed	No pets		L <input checked="" type="checkbox"/> T <input type="checkbox"/>
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ResponsibilitiesAgreed⊕

Tenant	Garden maintenance		L <input checked="" type="checkbox"/> T <input type="checkbox"/>
Tenant	Carpet cleaning		L <input checked="" type="checkbox"/> T <input type="checkbox"/>

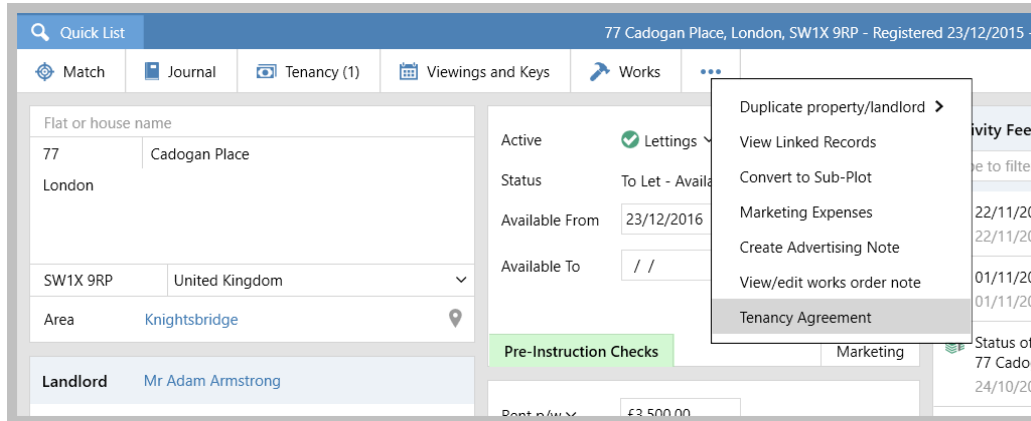
Specific *property* agreement clauses can also be set-up, see next step

2. Set property agreement clauses

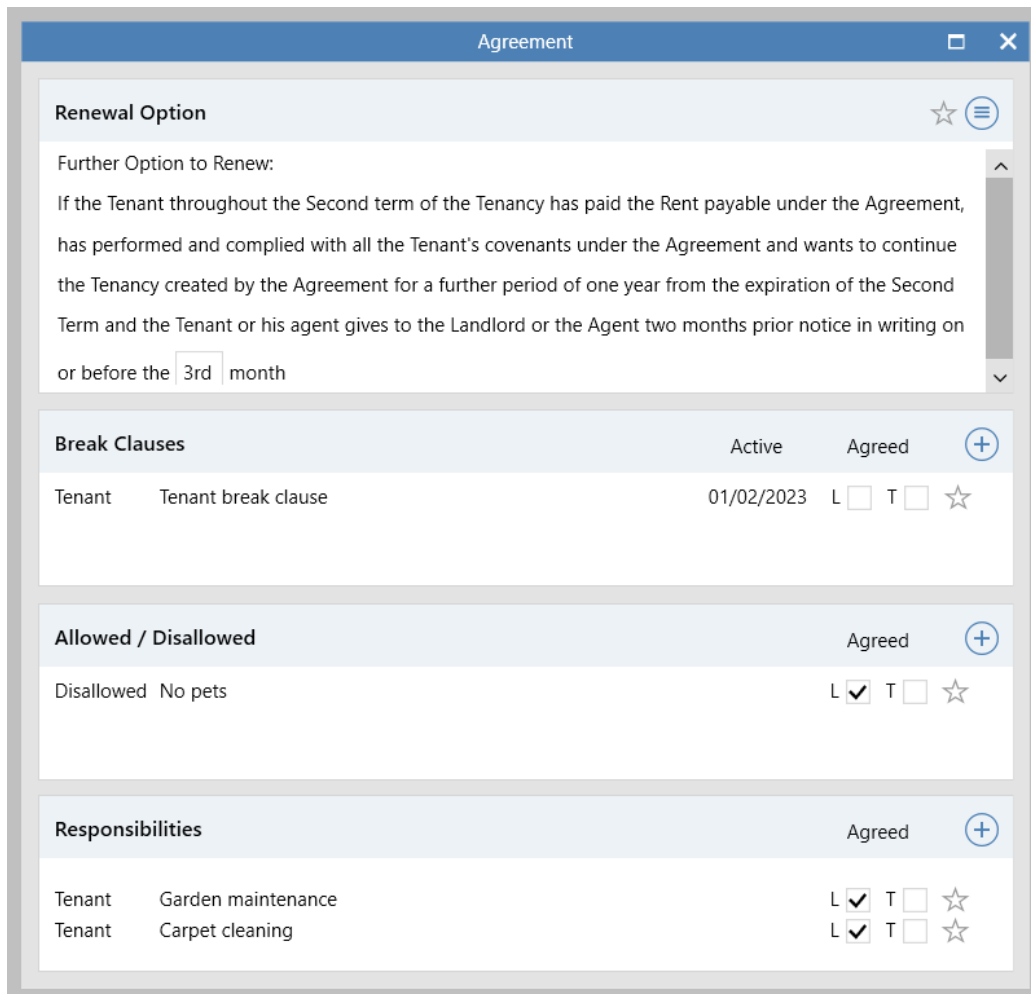
Property-specific agreement clauses can also be added in addition to the inherited landlord clauses

From property:

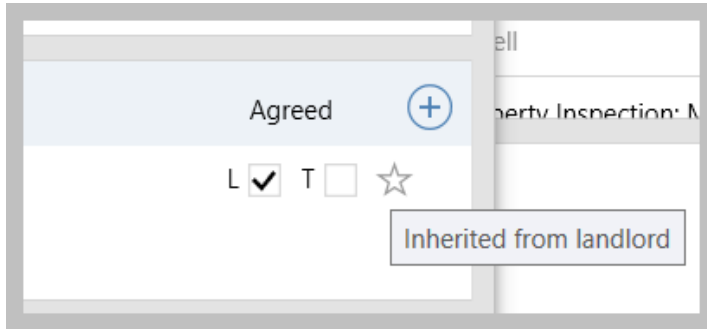
- Click ellipsis ... (top left) and select **Tenancy Agreement**




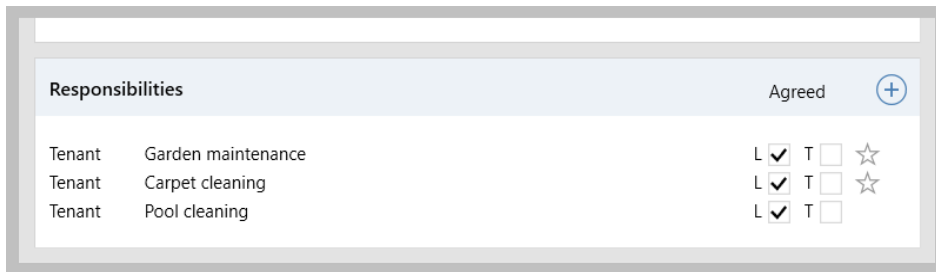
- The Agreement window is displayed, showing inherited landlord clauses



- 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)*

Ms P Scudamore - 77 Cadogan Place, London, SW1X 9RP - Registered 20/02/2023 - LON230003

Details Financial & Renewals **Agreement** Pre-Tenancy Management Post-Tenancy Letters

Renewal Option

Further Option to Renew:

If the Tenant throughout the Second term of the Tenancy has paid the Rent payable under the Agreement, has performed and complied with all the Tenant's covenants under the Agreement and wants to continue the Tenancy created by the Agreement for a further period of one year from the expiration of the Second Term and the Tenant or his agent gives to the Landlord or the Agent two months prior notice in writing on or before the month

Break Clauses

Active	Agreed	
Landlord	Landlord break clause	01/02/2023 L <input checked="" type="checkbox"/> T <input type="checkbox"/>

Allowed / Disallowed

Agreed	
Disallowed	No pets L <input checked="" type="checkbox"/> T <input type="checkbox"/> ☆

Responsibilities

Agreed	
Tenant	Garden maintenance L <input checked="" type="checkbox"/> T <input type="checkbox"/> ☆
Tenant	Carpet cleaning L <input checked="" type="checkbox"/> T <input type="checkbox"/> ☆
Tenant	Pool cleaning L <input checked="" type="checkbox"/> T <input type="checkbox"/> ☆

Activity Feed

Type to filter a

New tenan Cadogan P Status: Arra Yesterday b

Accounts Fun

Invoicing Receipts View Trans

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

The screenshot displays the 'Renewal Negotiation (Not started)' interface. The main content area is divided into several sections:

- Renewal Option:** A text block stating: 'Further Option to Renew: If the Tenant throughout the Second term of the Tenancy has paid the Rent payable under the Agreement, has performed and complied with all the Tenant's covenants under the Agreement and wants to continue the Tenancy created by the Agreement for a further period of one year from the expiration of the Second Term and the Tenant or his agent gives to the Landlord or the Agent two months prior notice in writing on or before the 3rd month'.
- Break Clauses:** A table with columns for 'Active' and 'Agreed'. A single row is shown: 'Landlord | Landlord break clause | 01/02/2023 | L T ☆'. A tooltip points to the star icon: 'Inherited from tenancy Has incomplete merge fields'.
- Allowed / Disallowed:** A table with columns for 'Agreed'. A single row is shown: 'Disallowed | No pets | L T ☆'.
- Responsibilities:** A table with columns for 'Agreed'. Three rows are shown: 'Tenant | Garden maintenance | L T ☆', 'Tenant | Carpet cleaning | L T ☆', and 'Tenant | Pool cleaning | L T ☆'.
- Activity Feed:** A list of activities. One entry is visible: '21/05/2023 1:00 PM - Inspection: 77 Cadogan SW1X 9RP 1 minute ago by Kian'.
- Tenancy Details:** A table with columns for 'Type' and 'Role'. Two rows are shown: 'Type | Assured Shorthol' and 'Role | Managed tenanc'.

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

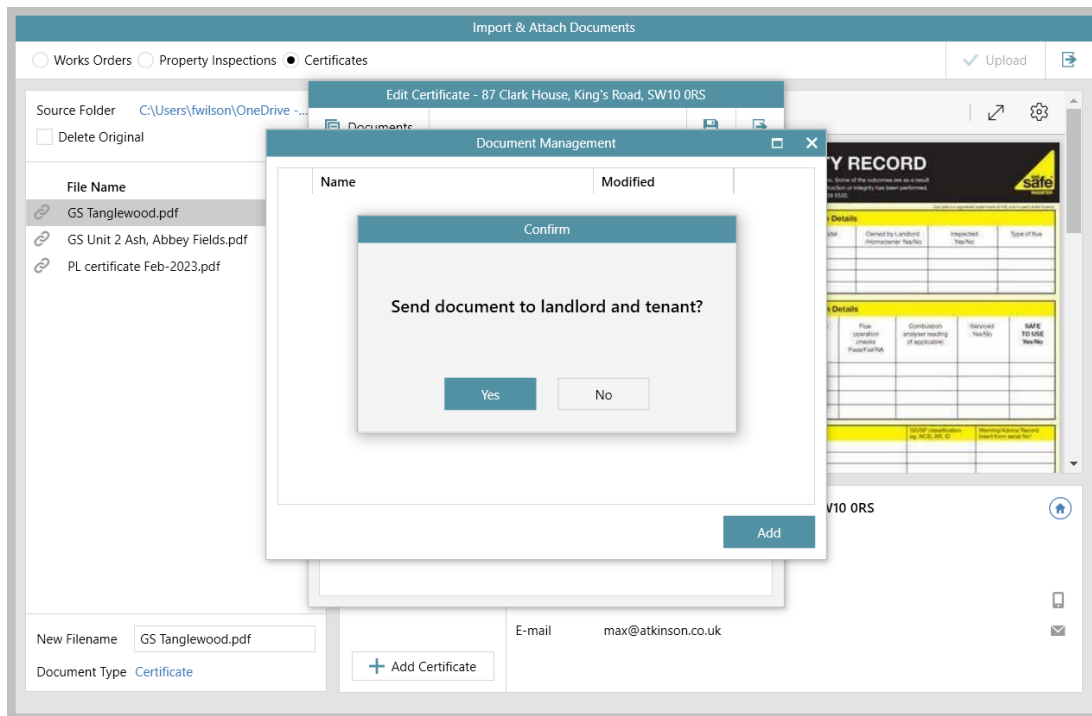
This guide has been reviewed against our global client base and classed as relevant to all regions

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*

From the document importer, **Certificates** view:

- When uploading a certificate document, a prompt will be displayed



- The certificate document is uploaded to a new email message

Who the email is addressed to and the email template used is dependent on configuration

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

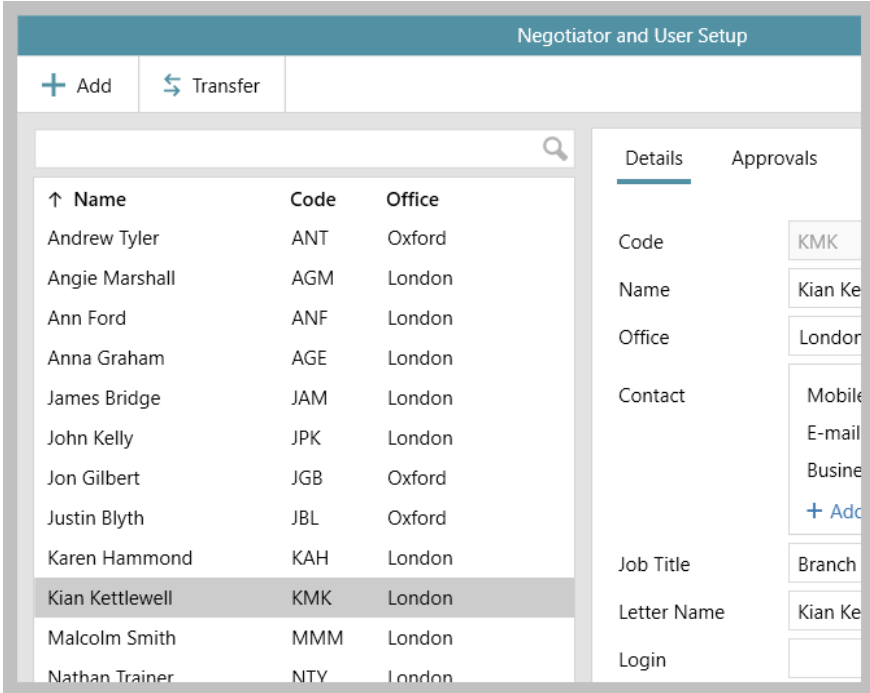
This addition to AgencyCloud 12.161 is useful to be aware of as, even if you do not have access to the Negotiator and User Setup screen, the options outlined below are available to Reapit Support to allow them to transfer your user data when staff members leave or change job role

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 screenshot shows the 'Negotiator and User Setup' interface. At the top, there are two buttons: '+ Add' and 'Transfer'. Below these is a search bar and a table of users. The table has columns for Name, Code, and Office. The user 'Kian Kettlewell' is highlighted. To the right of the table is a 'Details' panel with fields for Code, Name, Office, Contact, Job Title, Letter Name, and Login. The 'Code' field is set to 'KMK', 'Name' to 'Kian Ke', 'Office' to 'London', 'Contact' to 'Mobile', 'Job Title' to 'Branch', and 'Letter Name' to 'Kian Ke'.

Name	Code	Office
Andrew Tyler	ANT	Oxford
Angie Marshall	AGM	London
Ann Ford	ANF	London
Anna Graham	AGE	London
James Bridge	JAM	London
John Kelly	JPK	London
Jon Gilbert	JGB	Oxford
Justin Blyth	JBL	Oxford
Karen Hammond	KAH	London
Kian Kettlewell	KMK	London
Malcolm Smith	MMM	London
Nathan Trainer	NTY	London

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

Select

Please choose which of the following are to be transferred from Kian Kettlewell to Anna Graham:

Choosing 'All records' will process each in turn.

Choosing a record type will allow selection of which of those records are transferred

- All records
- Properties (87)
- Applicants (57)
- Contacts (49)
- Offers (9)
- Diary entries (103)
- Tenancies (29)
- Active works orders (14)
- Active renewal negotiations (4)
- Relationship: Property managers (4)
- Relationship: Property admins (1)
- Relationship: Client accounts assistants (1)
- Relationship: Property inspectors (1)
- Relationship: Tenancy managers (1)

Cancel Accept

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

The screenshot displays the 'New Estate Report' interface. At the top, there are 'New', 'Save', and 'Exit' buttons. Below the title, there are 'Estate Report' and 'Hide Estate Criteria' options. A list of criteria is shown on the left, including 'Client Account', 'Financial year start', 'Manager', 'Office', 'Registered', 'Status', and 'Year start', each with a dropdown arrow. To the right, there are 'Linked Records' such as 'Appointments', 'Blocks', 'Certificates', and 'Contact'. Further right, there are icons for 'Journal Entries', 'Messages & Tasks', and 'Works Orders', with a 'Show more ...' link. Below these, there are four filter rows: 'Client Account' (any of, Estate Account 2), 'Financial year start' (in preset range, Last 6 Months, 01/08/2022 to 31/01/2023), 'Status' (any of, Under Management), and 'Year start' (in preset range, Last 12 Months, 01/02/2022 to 31/01/2023). A 'Run Report' button is at the bottom right.

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**

New Estate Report 44 Estates

Reference	Address	Management Company	Manager
OHO220006	Enamc...	Dorchester Living, Office	h: 123456789
OHO220007	40A, Dr...		4568
OHO220008	Insert Te...		
OHO220009	Insert Te...		
OHO220010	The Dov...		
OHO220012	Leiceste...		
OHO220013	Block 1		
OHO220014	Bramble		
OHO220015	80 Dair...		87598
OHO220016	Radcliff House, 101 High Street, Solihull, B91 2TX		678;
OHO220017	27, 453 Test		
OHO220018	Phillips Development, 101 High Street, London		
RPT200011	The Exchange, Way		
RPT200012	Farm		
RPT200014	Royal Court, Park Road, Bedford, MK40 7DH, Port		7 777
RPT200015	Ascote, Ascote Lane, Dickens Heath, Shirley, B90		55653
RPT200016	12 Greswolde Mansions		
RPT200017	Brandon Gardens, Hemel Hempstead		
RPT200018	Smile, 01 Jomo Street, Ireland		

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

Choose Columns

- Reference
- Full Address
- Management Company
- Management Company Phone
- Added
- Client Account
- Financial Year Start
- Pre-Approved Works Limit
- Service Charge Invoicing
- Amended
- Custom Est Code
- Custom Est Negcode
- Custom Est Offcode
- Custom Est Register Details
- Manager Code
- Manager Name
- Office Code

Width of selected column: 80

Buttons: Move Up, Move Down, Cancel, Accept

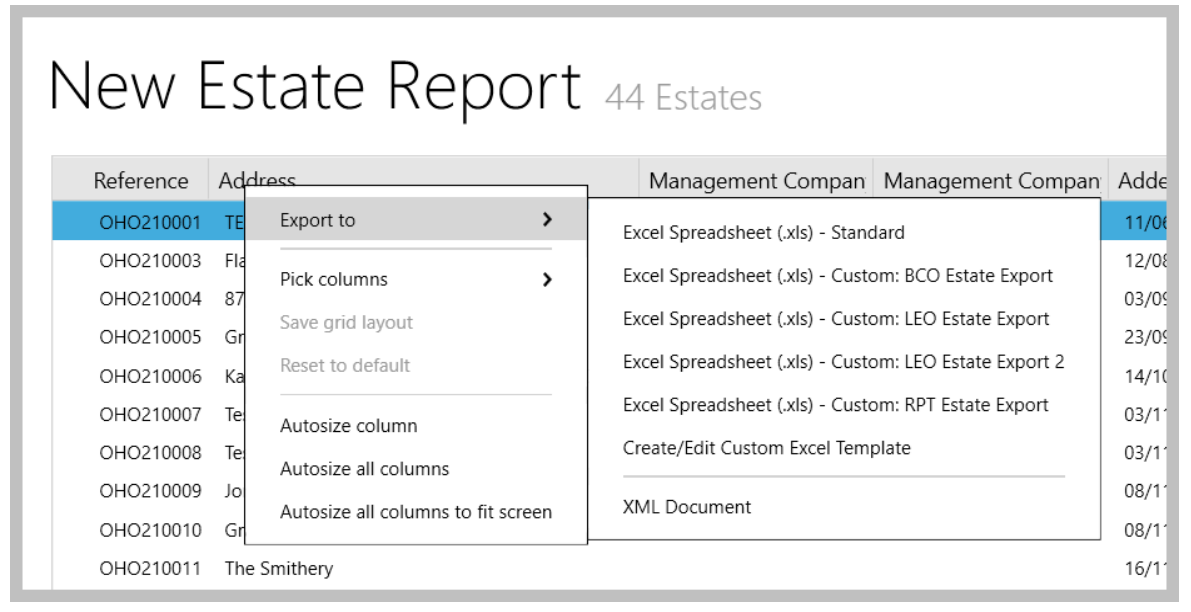
- Select required column, use **Move Up/Down** options to re-order the columns and click **Accept**
*To ensure the columns are shown for all future estates reports, right-click over the grid headings again and select **Save grid layout***

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

Search - 11 Estates Listed

+ Add Print Exit

Reference	Address	Management Company	Management Company...	Added
BED221349	Gables, 25 Brownlee Apartm...			01/12/2022 02:13 PM
BED221350	Green, 25 Brownlee Apartm...			01/12/2022 02:17 PM
EST220024	Peak Apartments	Dorchester Living, Office	h: 123456789; w: 90; e: r...	16/06/2022 01:50 PM
EST220032	Manifold Apartments	Dorchester Living, Office	h: 123456789; w: 90; e: r...	17/08/2022 04:03 PM
EST220035	Austin Apartments	Dorchester Living, Office	h: 123456789; w: 90; e: r...	23/10/2022 12:58 PM
EST220036	Interlagos Apartments	Dorchester Living, Office	h: 123456789; w: 90; e: r...	12/11/2022 12:57 PM
EST220037	Bukayo Casa Apartments	Dorchester Living, Office	h: 123456789; w: 90; e: r...	21/11/2022 11:10 PM
EST220039	Compass Apartments	Dorchester Living, Office	h: 123456789; w: 90; e: r...	07/12/2022 02:14 PM
NEL220002	Test Apartments			07/11/2022 03:01 PM
NEL220003	Test Apartments			08/11/2022 06:12 PM
OHO220014	Bramble Apartments			27/10/2022 12:42 PM

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: rpt	Leon Graham	16/09/2021 08:09 A
EST210006	Plainview Estate	Horace Management Hold	b: 768587598678;	Leon Graham	06/10/2021 02:26 P
EST210009	111	Horace Management Hold	b: 768587598678;	Leon Graham	08/10/2021 03:46 P
EST210010	The Brambles	Dorchester Living, Office	h: 123456789; w: 90; e: rpt	Leon Graham	17/10/2021 10:41 P
EST210016	Rafferty Reef	Franklins Solicitors, Northa	b: 01604 828 282;	Leon Graham	04/11/2021 04:20 P
EST220001	Curbar Village	Dorchester Living, Office	h: 123456789; w: 90; e: rpt	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
EST220003	Montevideo Mansions	Dorchester Living, Office	h: 123456789; w: 90; e: rpt	Leon Graham	18/01/2022 12:59 P
EST220005	Grenoble Green, Balsall Common, Solihull, West M	Dorchester Living, Office	h: 123456789; w: 90; e: rpt	Leon Graham	20/01/2022 08:03 A

For more information on using Block Management, see Knowledge Base section titled: [Block Management](#)