

# Reapit AgencyCloud 12.162

## release notes

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*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: v12.162

*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 12.162 the following screen has been redesigned to bring it in line with previously redesigned screens

### Setup marketing expenses

*The setup marketing expenses screen now uses the new UI format*

- Click your name/office at the top of the main menu
- Click **Configuration** and select **Setup Marketing Expenses**
- The **Setup Marketing Expenses** screen uses the new UI format

The screenshot displays the 'Setup Marketing Expenses' interface. At the top, there is a teal header with the title 'Setup Marketing Expenses'. Below the header, there is a '+ Add' button and two icons (a save icon and a refresh icon). The main content area is divided into two sections. On the left, there is a 'View' section with two radio buttons: 'Marketing Expenses' (selected) and 'Marketing Packages'. Below this is a list of marketing options with their corresponding codes:

Marketing Option	Code
Advert option 1	LON042
Advert option 2	LON043
Brochure - standard	LON044
Standard board	LON045
Standard photos	LON046
Superior board	LON047
Specialist photos and floorplan	LON048
Luxury brochure	LON049

On the right, there is a detailed form for 'Advert option 1' (code LON042). The form fields are as follows:

- Code: LON042
- Name: Advert option 1
- Description: Half page - London Magazine
- Type: Advertising
- Publication: The London Magazine
- Ad Size: 1/2 Page
- Nominal Code: Landlord Admin Charge
- Cost: £200.00
- Vendor Charge Net: £40.00
- Agency Charge Net: £120.00
- Neg Charge Net: £40.00
- VAT Code: UK Standard (20%)
- Offices: London

Setup Marketing Expenses

+ Add
📄
🔗

View:  Marketing Expenses  Marketing Packages

Standard package 1	LON050
Superior package	LON051

Code:

Name:

Description:

Offices: London

**Items** +

£200.00	Advert option 1
£350.00	Brochure - standard
£0.00	Standard board
£0.00	Standard photos

The setup marketing expenses screen is one of several configuration areas within AgencyCloud where access can be given to authorised users - for more information on using this screen, see Knowledge Base guide titled: **Marketing expenses - how to add & edit**

For more information on further configuration areas within AgencyCloud where access can be given to authorised users, see Knowledge Base guide titled: **Self service configuration options for AgencyCloud**

For more information on using marketing expenses, see Knowledge Base guide titled: **Marketing expenses functionality**

# Update to behaviour when using pre-populated ID configuration option

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

This ID-related update is relevant to systems set-up with the following two configuration options:

- When creating a new ID check, details from the previous ID check are used to populate check detail, as outlined in the Knowledge Base guide titled: **New ID check is pre-populated with previous details - configuration option**
- When using a third party for ID checking, a user is able to carry out a manual override to bypass the third party check, as outlined in the Knowledge Base guide titled: **ID check override option - configuration option**

*With the above two options enabled...*

If the last check carried out was a manual override, when creating a new ID check:

- the check carried out as a manual override will be ignored
- details for the new check will be taken from the check carried out prior to the last manual override

# Sales & lettings/rentals

## Duplicate a property as sales or lettings

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

From AgencyCloud 12.162+, an option is available which provides a more efficient option to duplicate:

- a sales property as a lettings property  
OR
- a lettings property as a sales property

Prior to version 12.162, for example:

- if a lettings property needed to be converted to a sales property and lettings marketing stopped - the lettings property record would first need to be dual-marketed as both sales and lettings, then lettings marketing would need to be stopped on that record
- if needing to market a lettings property as sales, but the lettings property has transactions - the property would need to be duplicated, then dual-marketed, then the lettings marketing would need to be stopped on the duplicate record to create the sales record

This update means that a duplicate can be created alongside the original property record without the need to dual market the original first, plus a lettings property with transactions can just be duplicated as a sales property without this causing an issue

### 1a. Sales property

From sales property:

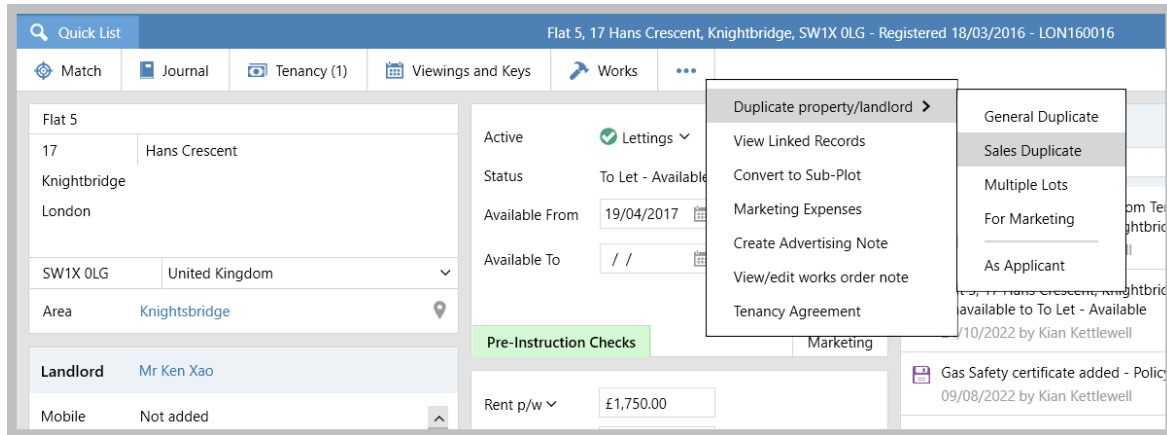
- Click ellipsis (...)
- Select **Duplicate property/vendor** and click **Lettings Duplicate**

The screenshot shows the AgencyCloud interface for a property record. The top navigation bar includes 'Quick List' and the property address '65 Coleridge Square, West Brompton, SW10 0RT - Registered 05/11/2015 - LO'. Below the navigation bar are tabs for 'Match', 'Journal', 'Offers', and 'Viewings and Keys'. The main content area displays property details: 'Flat or house name' (65 Coleridge Square, West Brompton), 'SW10 0RT United Kingdom', and 'Area South West London'. The 'Vendor' section lists 'Mr T Pando & Mrs M Pando' with contact information. A 'Pre-Instruction' dropdown menu is open, showing options: 'Duplicate property/vendor', 'View Linked Records', 'Convert to Sub-Plot', 'Marketing Expenses', 'Create Advertising Note', and 'Invoicing'. A secondary menu is open under 'Duplicate property/vendor', listing: 'General Duplicate', 'Lettings Duplicate', 'Multiple Lots', 'Previous/Subsequent Sale', 'For Marketing', and 'As Applicant'. The 'Lettings Duplicate' option is highlighted. The bottom right shows a list of transactions for the property, including '65 Coleridge Square Sale - Available' and 'Letter: Post Mark'.

## 1b. Lettings property

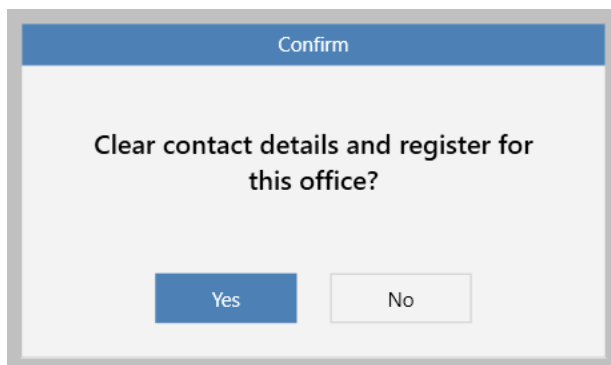
From lettings property:

- Click ellipsis (...)
- Select **Duplicate property/vendor** and click **Sales Duplicate**



## 2. Next steps

- Selecting either option above will first prompt to clear the property office details  
*Select Yes/No as appropriate*



- A prompt to copy the property pictures and/or room detail will also be offered
- When duplicating a sales property as a lettings property, enter landlord information
- When duplicating a lettings property as a sales property, enter vendor information

After working through the prompts and entering the landlord/vendor information, the new duplicate property record is created

### 3a. Duplicated sales property as a lettings property

The new lettings property record is created as a duplicate, meaning that the original sales property is still on the system as a separate record

The screenshot shows a software interface for a property record. The title bar indicates the property is '65 Coleridge Square, West Brompton, SW10 0RT - Registered'. The main content area is divided into several sections:

- Property Details:** Flat or house name: 65 Coleridge Square, West Brompton. SW10 0RT, United Kingdom. Area: South West London.
- Landlord:** Mr T Pando. Mobile: 07738 839 8390. Home: Not added.
- Property Status:** Active (checked), Lettings (selected). Status: Market Appraisal. Available From: //.
- Pre-Instruction Checks:** Rent p/m: £0.00. Letting Fee: 0%. Not managed: 0.0.
- Marketing:** A button labeled 'Marketing' is visible.
- Activity Panel:** A vertical panel on the right shows activity logs with icons for document uploads and status changes.

### 3b. Duplicated lettings property as a sales property

The new sales property record is created as a duplicate, meaning that the original lettings property is still on the system as a separate record

The screenshot shows a software interface for a property record. The title bar indicates the property is 'Flat 5, 17 Hans Crescent, Knightbridge, SW1X 0LG - Registered 10'. The main content area is divided into several sections:

- Property Details:** Flat 5, 17 Hans Crescent, Knightbridge, London. SW1X 0LG, United Kingdom. Area: Knightsbridge.
- Vendor:** Mr Ken Xiao. Mobile: Add ... Mobile Whe...: 07700 900209. E-mail: ken@xaochina.com.
- Property Status:** Active (checked), Sales (selected). Status: Market Appraisal. Agency: Sole Agent (checked), Sub agents (unchecked). Disposal: Private Treaty.
- Pre-Instruction Checks:** Asking Price: £0. Commission: 0%.
- Financial:** A button labeled 'Financial' is visible.
- Attributes:** A section at the bottom with a pencil icon for editing.
- Activity Panel:** A vertical panel on the right shows activity logs with icons for document uploads and status changes.

The **Notes** panel on the duplicated property record contains an indication that the property has been copied (e.g. *Property copied from reference: LON150015*)

# View all contact details in diary appointment

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

From AgencyCloud 12.162+, the contact details for all parties involved in an appointment are accessible from the diary appointment screen (prior to this, only the main vendor/landlord/tenant/applicant details were shown)

This enhancement allows all contact details for both the main and joint vendor/landlord/tenant/applicant involved in an appointment to be viewed from within the diary appointment screen

## 1. Access contact details from diary appointment

From diary appointment:

- When more than one vendor/landlord or applicant/tenant is present on a property/applicant/tenancy record, their names will be shown on the appointment screen as a link

The screenshot displays the 'Diary' interface with the following details:

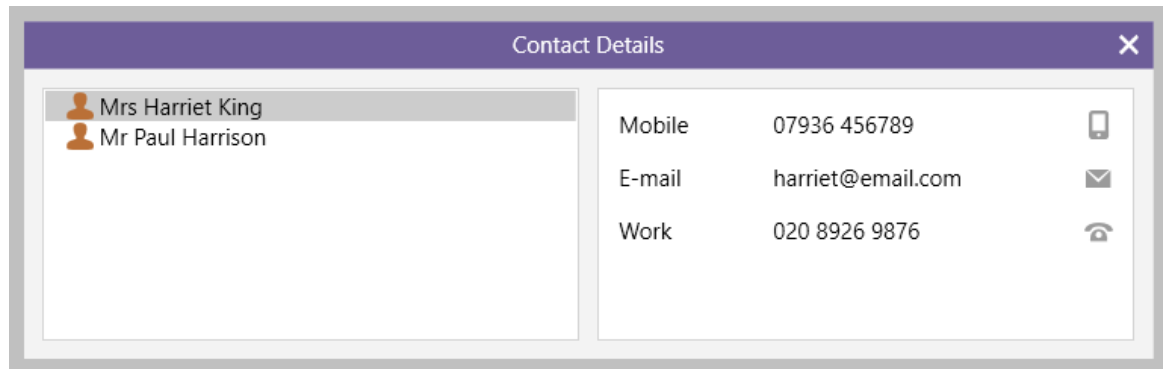
- Header:** 'Diary' title, navigation buttons: '+ Add Another', '+ Duplicate', 'New Offer', 'Print', 'Save', 'Refresh'.
- Appointment Details:**
  - Entry Date: 11/03/2023 (calendar icon)
  - From: 12:00, To: 12:30
  - Recur every: 0, Until: // (calendar icon)
  - Entry Type: Viewing (dropdown), Virtual:
  - Comments: 'Enter entry comments' (text area)
  - Accompanied:  Kian Kettlewell, Other Agent:
  - + Negotiators/Offices:  Confirmed:
  - Cancelled:  Repeat:  All Confirmed:
- Follow Up:**
  - Follow Up:  12/03/2023 (calendar icon), Followed Up:
  - Notes: 'Enter follow up notes' (text area)
- Property Details:**
  - Property: LON220004 (search icon), Confirmed:  Followed Up:
  - Address: 35 Moncorvo Close, Knightsbridge, SW7... (location pin icon, edit icon)
  - Image: A photograph of a large, multi-story stone building.
- Vendor Details:**
  - Vendor: Mrs Harriet King & Mr Paul Harrison (highlighted with a yellow box)
  - Mobile: 07936 456789 (phone icon)
  - E-mail: harriet@email.com (email icon)
  - Work: 020 8926 9876 (work icon)
- Applicant Details:**
  - Applicant: LON220003 (search icon), Confirmed:  Followed Up:
  - Applicant: Miss Keisha Wilkin, Mr Christian Kane (highlighted with a yellow box)
  - Mobile: 07925 987654 (phone icon)
  - E-mail: keishaw89@email.com (email icon)
  - Additional info: £1,000,000 to £2,000,000, General, Area: Group South West London.



## 2. Contact details

In the example above, two vendors and two applicants are on the property and applicant record:

- Click a link to view contact details
- Select the name on the left to view their contact details on the right



Icons to the right of the contact type provide shortcuts to sending an email, as well as making a call or sending an SMS (where enabled)

## Store QR code image types on a property

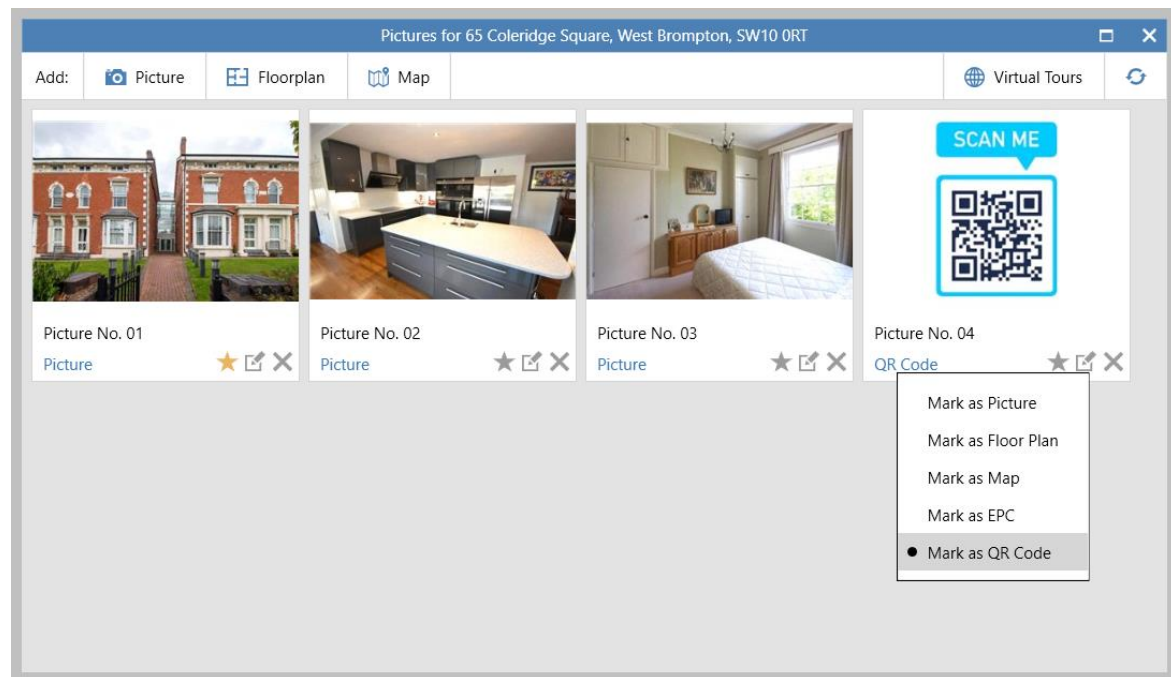
*This guide has been reviewed against our global client base and classed as relevant to all regions*

An image can be added to a property and marked with the image type of QR code

This allows QR code images to be stored for use on window cards/brochures

From property pictures (bottom left):

- Add QR code image as a picture (as usual)
- Click image type link (which will default to **Picture**) and select **Mark as QR Code**



Marking the image type as QR Code identifies it for use when generating property details/brochures/window cards

More information on adding images and preparing property details is available in the Knowledge Base guide titled: ***Prepare a property for marketing***

# Set 'required by' date on checklist items to identify overdue items - 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 a 'required by' date to be added to required checklist items, this allows items to be reported on by 'required by' date and overdue items to be identified in grids

Once a checklist item with a 'required by' date is marked as completed or not needed, the item will be removed from any overdue report/list

*To enable this configuration option, contact Reapit Support*

For more information on checklists, see section at the bottom of this article titled: **Checklists in AgencyCloud**

## 1. Enter 'required by' date

From checklist (e.g. pre-instruction checks):

- Items that allow a required by date to be set have a date field beside them
- Click the calendar icon and select the relevant date

Pre-Instruction Checks					
<a href="#">+ Add check</a>					<a href="#">→</a>
Signed contract received	✓	Completed	31/03/2023		
EPC Ordered	✓	Completed	27/02/2023		
Photos	✓	Completed			
ID Checks Complete	✓	Completed	28/03/2023		
Details approved	✓	Completed			

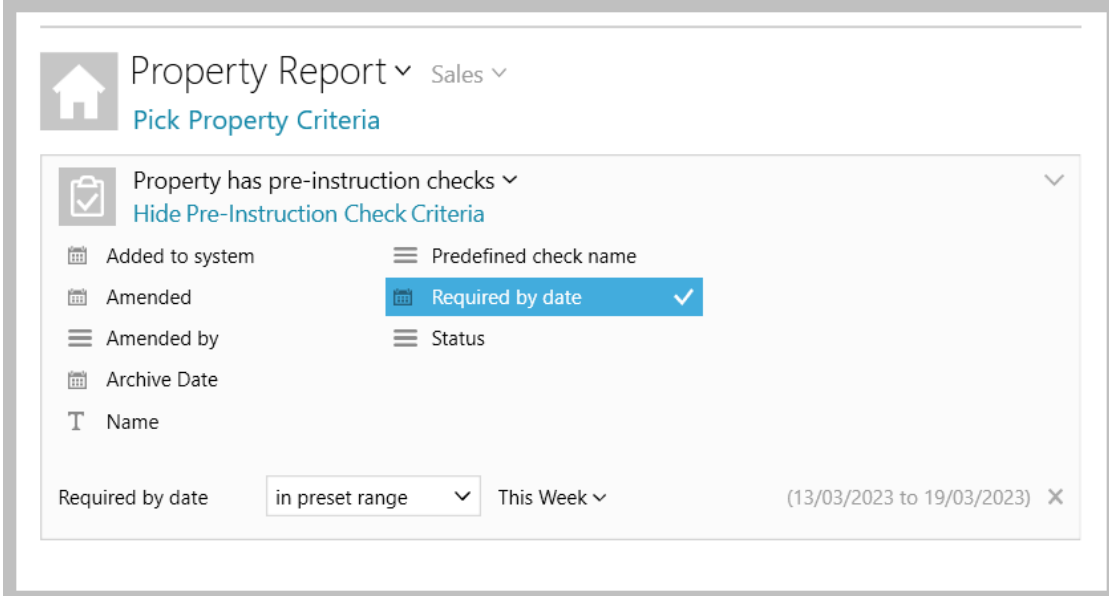
Items with a 'required by' date option is dependent on configuration (see introduction)

## 2. Reporting

A *required by date* criteria option is available for any report that includes checks (where 'required by' date functionality is enabled)

From Power Report:

- Select report type (e.g. **Property Report** with **Pre-Instruction Checks** added as a Linked Record)
- Select **Required by date** and enter the date range to report on



The screenshot shows the configuration interface for a 'Property Report' under the 'Sales' category. The main heading is 'Property Report' with a dropdown arrow, and 'Sales' is also a dropdown. Below this is a link 'Pick Property Criteria'. A secondary heading is 'Property has pre-instruction checks' with a dropdown arrow, and a link 'Hide Pre-Instruction Check Criteria'. A list of criteria is shown with icons and labels: 'Added to system', 'Amended', 'Amended by', 'Archive Date', 'Name', 'Predefined check name', 'Required by date' (highlighted in blue with a checkmark), and 'Status'. At the bottom, there is a 'Required by date' section with a dropdown set to 'in preset range', another dropdown set to 'This Week', and a date range '(13/03/2023 to 19/03/2023)' with a close icon.

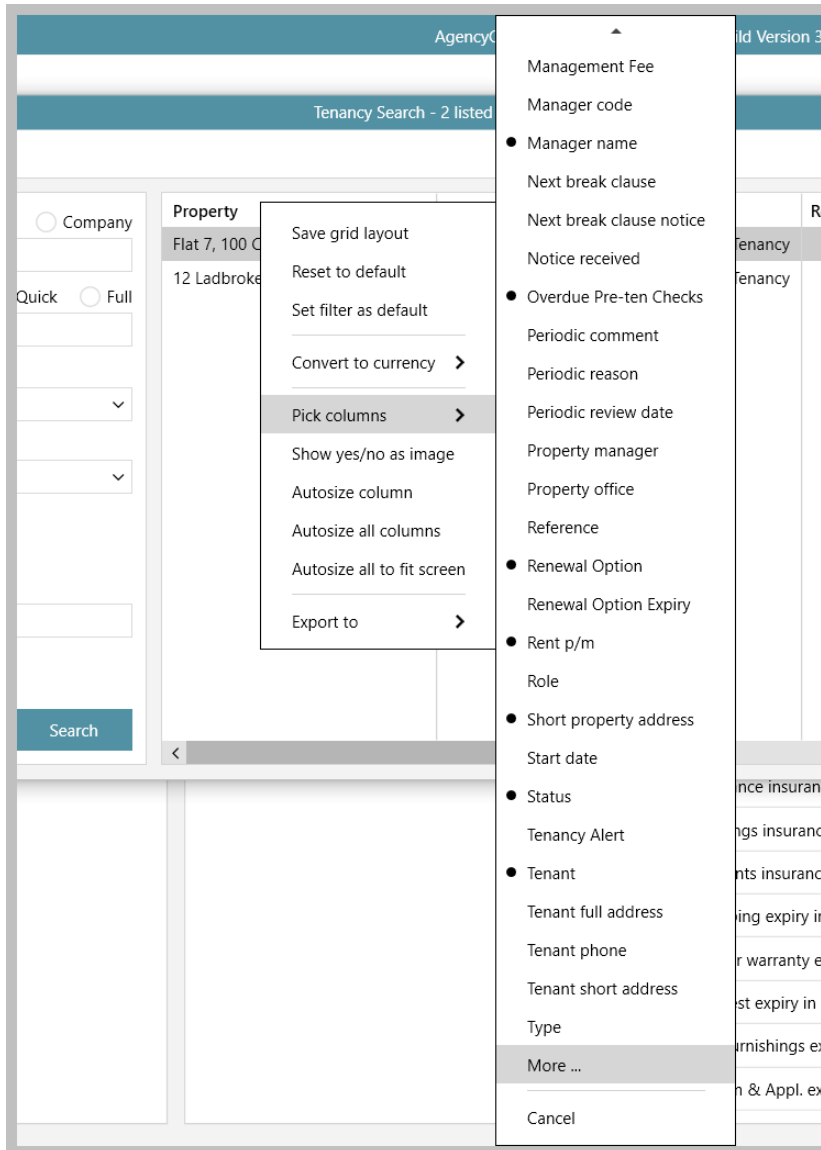
### 3. Show overdue checks in grids

After running a report or viewing a grid via the Organiser where check detail can be returned, overdue checks can be identified

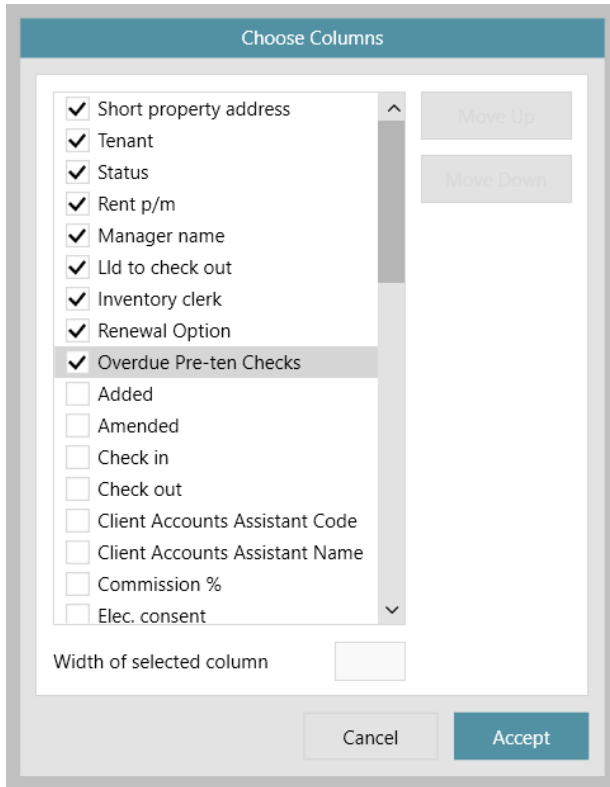
A column showing overdue check information needs to be added & saved to the relevant grids first

From the grid:

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



- Tick **Overdue <xx> Checks** (xx = the type of check relevant to the grid) and click **Accept**



- 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**

**Overdue checks column added & saved**

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) and enter search text

Available Properties - Sales					
Double-click to view					
Reference	Address	Overdue pre-instruction checks	Price	Status	Vend
BUC070134	The Bungalow, 93 Gawcott Road				Ms M
BUC150234	The Bungalow, Paynes Court	Terms and Conditions (27/02/2023)			Ms A
BUC130073	Oaklands, Leyland Close, Gawcott	New Instruction (01/03/2023); Pre inst			Mr D
RPT210005	33 Juno Crescent, Brackley				Mr R
BUC130167	79 Bourton Road, Buckingham		£200,000	Sold STC - Unavailable	Ms Li
RPT200186	15 Brotherton Avenue, Redditch		£300,000	Sold STC - Unavailable	Mr G

Checks are classed as overdue when the check is marked as Needed or Sent/Arranged and the date they are required is in the past  
 Once a checklist item is marked as Completed/Not Needed, the item will be removed from any overdue report/list

## Checklists in AgencyCloud

Checklists help to ensure that specific processes and checks are being followed and logged in AgencyCloud. A range of checklist types are available and contain items specific to your business requirements.

Users are required to mark off items as needed/not needed/in progress/completed - for some checklist types, items can be mandatory or optional and can also require documents to be uploaded as part of the check.

The 'required by' date can be set on any/all item(s) within the following checklist types:  
*(information on each checklist option available, is available via the Knowledge Base)*

- pre-instruction
- re-let
- pre-acceptance offer
- pre-tenancy
- post-tenancy
- renewal
- certificate
- supplier
- management *(for block management)*

# Supplier approval enhancements & supplier accreditation functionality - configuration option

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

From AgencyCloud 12.162, supplier approval functionality has undergone various enhancements along with the addition of supplier accreditation functionality

This section covers the following:

- 1) Supplier cannot be approved when supplier checklist is not complete - configuration option
- 2) Supplier cannot be approved when no supplier type is specified - configuration option
- 3) Supplier requires re-approval when changes made - configuration option
- 4) Supplier accreditation
  - a) Default supplier accreditations can be set up - configuration option
  - b) Supplier cannot be approved with expired/missing accreditations - configuration option
- 5) Supplier changes logged in journal
- 6) Organiser Property Management panel additions
  - a) View suppliers awaiting approval on Property Management panel of Organiser
  - b) Add new columns to suppliers awaiting approval grid

*To enable any of the configuration options outlined in this section, contact Reapit Support*

For information on approving a supplier, see Knowledge Base guide titled: **Approve supplier and/or bank details - configuration option**



## 1. Supplier cannot be approved when supplier checklist is not complete - configuration option

When using supplier checklist functionality, a configuration option is available which prevents a supplier from being approved until the checklist has been completed

- When clicking **Unapproved** to attempt to approve the supplier and the supplier checklist is not complete, a prompt is displayed

The screenshot displays a software interface for managing a supplier. At the top, a header bar reads "Company: FRH Roofing, Southampton - LON23000018". Below this, there are several sections: "Documents", "Company" details (FRH Roofing, Southampton), "Business" details (Supplier (Unapproved), Roofer), "Active" status, and contact information (Mobile: 07149 987654). A modal dialog box titled "Information" is overlaid on the screen, containing the following text: "This supplier cannot be approved", "The following checks have not been completed:", "Supplier bank details added; Supplier reference 1; Supplier reference 2; Supplier Service Level Agreement added", and an "OK" button.

For more information on supplier checklist functionality, see Knowledge Base guide titled: **Supplier checklist - configuration option**

## 2. Supplier cannot be approved when no supplier type is specified - configuration option

A configuration option is available which prevents a supplier being approved when the supplier business type has not been specified

- When clicking **Unapproved** to attempt to approve the supplier and the **Supplier Type** has not been set, a prompt is displayed

The screenshot displays a software interface for managing suppliers. At the top, a header bar reads "Company: Jackson Joinery, Oxford - LON23000016". Below this, a "Documents" tab is visible. The main content area is divided into several sections: "Company" (Jackson Joinery), "Office" (Oxford), "Business" (Supplier (Unapproved)), and "Supplier" (Supplier Type ...). There are checkboxes for "Core" and "On hold", and a dropdown menu for "Active" with an "Identity Che" icon. Below these are fields for "Business" (Add ...), "Mobile" (07964 369852), and "E-mail" (admin@jacksonjoinery.co.uk). A "+ Add another" link is also present. On the right side, there are sections for "Staff", "Relationships", and "Activity". A modal dialog box is overlaid on the interface, titled "Information", with the message "Suppliers must have a Supplier Type set before approving" and an "OK" button.

### 3. Supplier requires re-approval when changes made - configuration option

A configuration option is available which requires an approved supplier to be re-approved when changes have been made to the supplier record

The record will need to be re-approved if:

- Supplier **Type** is changed or added to
- Supplier **Core** status is changed
- Supplier **Office** is changed

In this example, the supplier type was approved as **Building & Maintenance** then **Handyman** was added as a second type, therefore the following prompt is displayed when saving the company/supplier record

The screenshot shows a web interface for a supplier record. At the top, it says "Company: Jackson Joinery, Oxford - LON23000016". Below this is a "Documents" tab. The main content area is divided into several sections: "Company" (Jackson Joinery), "Office" (Oxford), "Business" (Supplier), "Supplier" (Building & Maintenance, Handyman), "Active" (dropdown menu), "Core" and "On hold" checkboxes, "Non-VAT registered" checkbox, "Business" (Add ...), "Mobile" (07964 369852), "E-mail" (admin@jacksonjoinery.co.uk), and "Add another". There are also sections for "Staff", "Relationships", "Payments and Terms", "Transactions", and "Payments". A "Confirm" dialog box is overlaid on the page, asking "Supplier type changed - saving this change will set the supplier to unapproved. Proceed?" with "Yes" and "No" buttons.

#### 4. Supplier accreditations

4a. Default supplier accreditations can be set up - configuration option

4b. Supplier cannot be approved with expired/missing accreditations - configuration option

##### 4a. Default supplier accreditation types can be set up

Configuration is available which allows:

- required default accreditations can be setup to differ dependent on supplier type
- different default supplier accreditation lists to be setup for core suppliers or non-core suppliers (when using core supplier functionality)

For more information on core suppliers, see Knowledge Base guide titled: **Add core suppliers - configuration option**

##### 4b. Supplier cannot be approved with expired/missing accreditations

Configuration is available which prevents a supplier from being marked as approved until the default accreditation types for the supplier type have been entered and are valid/in date

With the above configuration in place and supplier accreditations are missing or have expired:

- An exclamation mark icon is displayed beside supplier type

Company: Dust Busters, London - LON23000020

Documents

Company: Dust Busters  
Office: London  
Business: Supplier (Unapproved)   
Supplier: **! Cleaner**  
 Core  On hold  
Active:  Identity Check  
 Non-VAT registered

Business: 020 8962 9876   
Mobile: 07681 234567   
E-mail: admin@dustbusters.co.uk   
[+ Add another](#)

Flat or house name  
210 Tyreman Street  
London

SW1A 7SD United Kingdom

Areas Covered:   
Public:   Opt out of marketing

Staff   
Isobel Young - Owner - m: 07681 234567

Relationships   
Main Office: London   
Key Contact: Kian Kettlewell

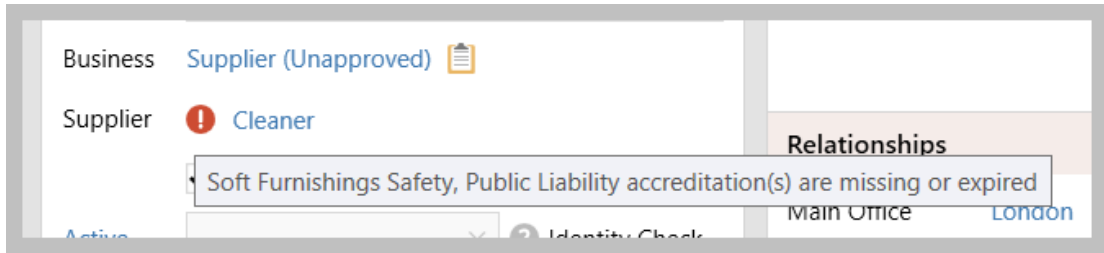
Accreditations   
Type Expiry Details

Payments and Terms [Transactions](#) [Payments](#)  
Bank: High Street Bank, London  
Nominal code: Cleaning  
Commission paid to agent on supplier invoices: 2 %  
Referral Fee: £10.00  
Terms description: 28 days

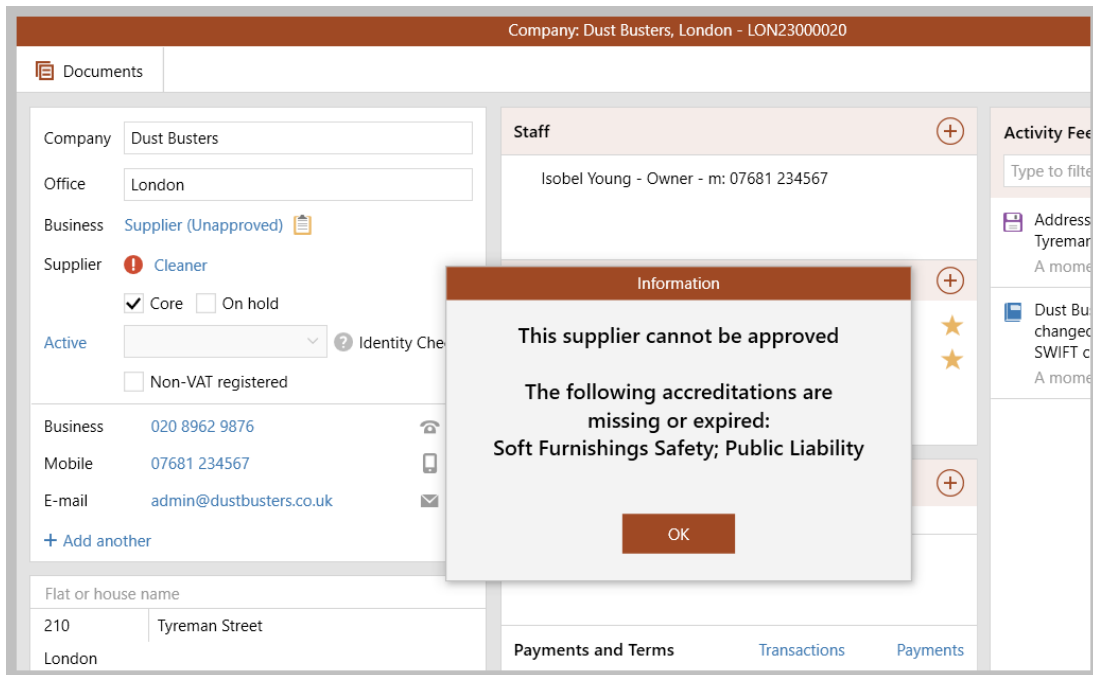
Activity F  
 Type to fi  
 Address: Tyrem  
A mor  
 Dust E  
chang  
SWIFT  
A mor

Descriptio

- Hovering over the icon displays information on which accreditation certificates need to be entered or have expired



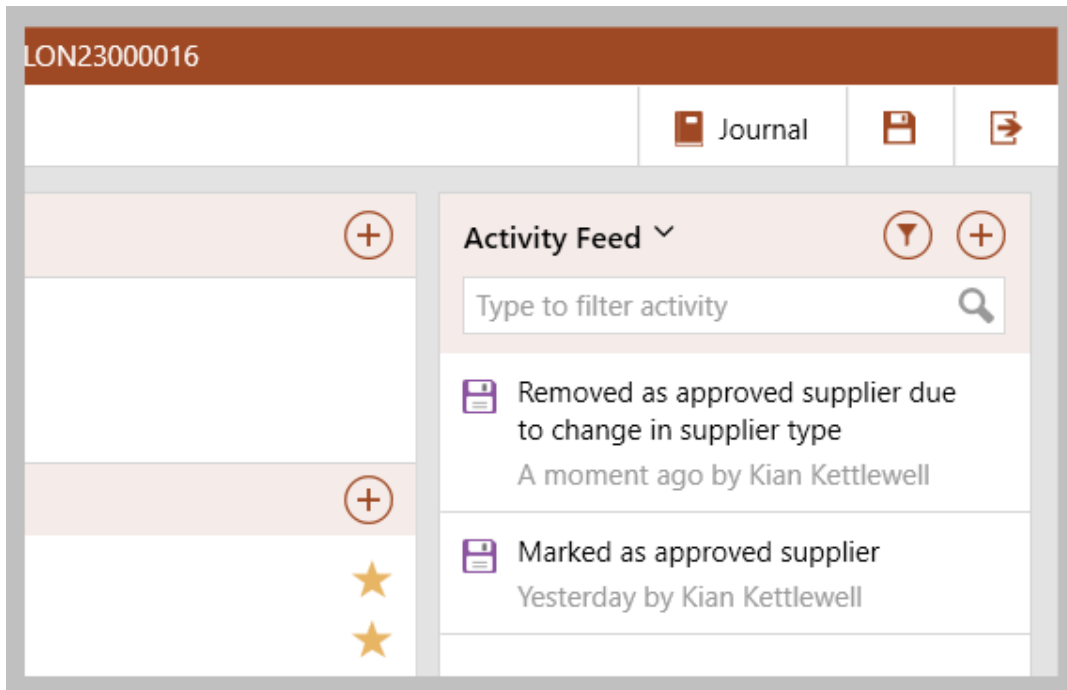
- If attempting to approve the supplier, a prompt will be displayed



## 5. Supplier changes logged in journal

The company/supplier Activity Feed will log when:

- a supplier is marked as approved
- a supplier has been removed as an approved supplier due to a change in the supplier type  
*Applies when using the configuration option outlined in section 3 above*



## 6. Organiser Property Management panel additions

6a. View suppliers awaiting approval on Property Management panel of Organiser

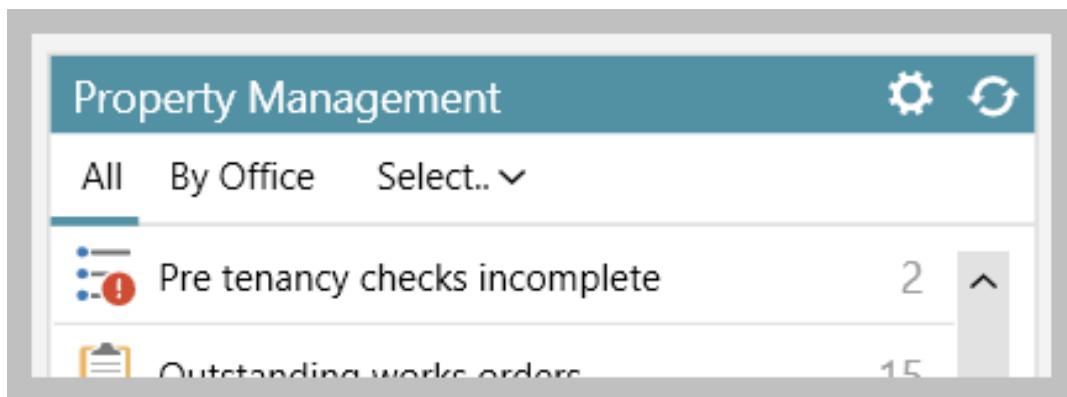
6b. Add new columns to suppliers awaiting approval grid

### 6a. View suppliers awaiting approval on Property Management panel of Organiser

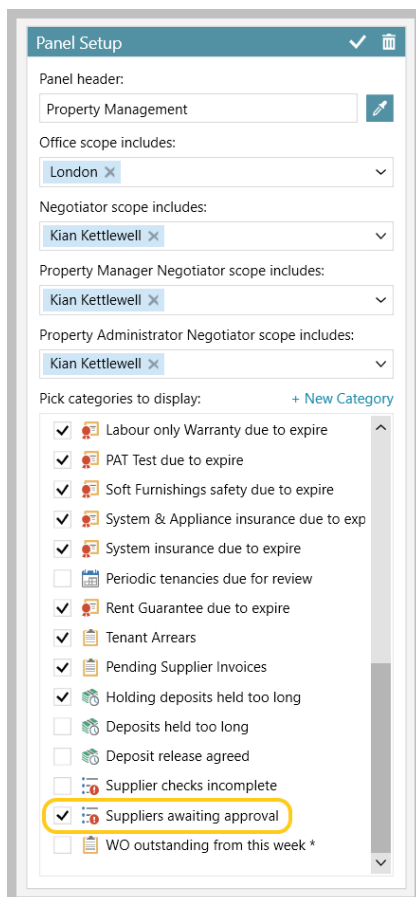
When using supplier approval functionality, the Property Management panel on the Organiser can flag and display list of suppliers awaiting approval

To add suppliers awaiting approval to the Property Management panel:

- Hover over panel header and click cog icon (top right) to access Panel Setup

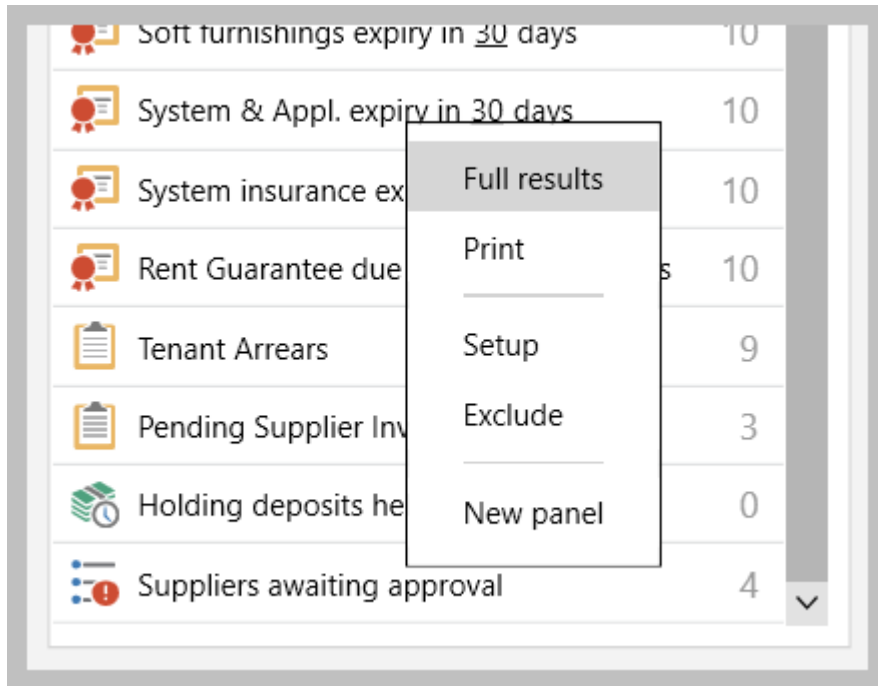


- Tick **Suppliers awaiting approval** and click tick icon (top right) to save



**Suppliers awaiting approval** will now be displayed on the Property Management panel:

- Click to view a list of suppliers, or right-click and select **Full results** to view the grid



- Suppliers awaiting approval** grid is displayed

Suppliers awaiting approval							
Double-click to view							4 Companies Listed
Name	Office	Address	Phone	Active	Core	On...	Business
K S Maintenance	London	6 Meadow View, London, N11 8DH	m: 07395 456789;	Active	No	No	Supplier (Un...
FRH Roofing	Southampton	150 Market Row, Southampton, SO14 5SG	m: 07149 987654;	Active	Yes	No	Supplier (Un...
Dickson & Taylor Plumbing & Heating	Oxford	10 Tilehurst Road, Reading, RG1 1DG	m: 07692 123456;	Active	No	No	Supplier (Un...
Dust Busters	London	210 Tyreman Street, London, SW1A 7SD	b: 020 8962 9876; m: 07...	Active	Yes	No	Supplier (Un...



## 6b. Add new columns to suppliers awaiting approval grid

Three new columns can be added to the suppliers awaiting approval grid:

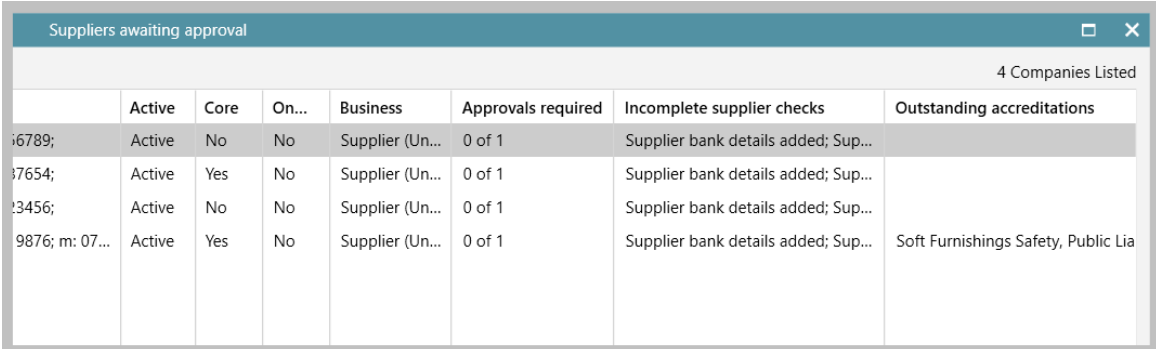
1. **Incomplete supplier checks** - available when using supplier checklist functionality, see section 1
2. **Approvals required**
3. **Outstanding accreditations** - available when using supplier accreditation functionality, see section 4

To add one/more columns:

- Right-click over the column headings, select **Pick columns** then select the required columns:
  - **Incomplete supplier checks**
  - **Approvals required**
  - **Outstanding accreditations**
- The new columns are added to the far right side of the grid - click and drag the column headings to the desired position
- Right-click over the column headings again and click **Save grid layout**

The new columns will be displayed 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) and enter search text



The screenshot shows a window titled "Suppliers awaiting approval" with a close button. The window displays a table with 4 companies listed. The table has the following columns: Active, Core, On..., Business, Approvals required, Incomplete supplier checks, and Outstanding accreditations. The data rows are as follows:

	Active	Core	On...	Business	Approvals required	Incomplete supplier checks	Outstanding accreditations
6789;	Active	No	No	Supplier (Un...	0 of 1	Supplier bank details added; Sup...	
7654;	Active	Yes	No	Supplier (Un...	0 of 1	Supplier bank details added; Sup...	
3456;	Active	No	No	Supplier (Un...	0 of 1	Supplier bank details added; Sup...	
9876; m: 07...	Active	Yes	No	Supplier (Un...	0 of 1	Supplier bank details added; Sup...	Soft Furnishings Safety, Public Lia

# Relationship changes logged in Activity Feed

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

From AgencyCloud 12.162+, when a relationship is changed or removed, either manually or via the Negotiator and User Setup screen, this is logged in the related Activity Feed

All role records (i.e. property, landlord, tenancy, applicant, company and contact) have a relationships panel allowing specific users to be identified with regards to their role for the selected record

## 1. Manual changes to relationships

A note in the Activity Feed is made when a user manually:

- changes an existing relationship from one user to another
- removes a relationship from a record

*New relationships added to a role are not logged - only changes or removals are noted*

## 2. Changes to relationships made via the Negotiator and User Setup tool

A note in the Activity Feed is made when relationships are changed/removed via the Negotiator and User Setup screen - a note is also made to indicate that the relationship transfer was done via the transfer tool

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: **Add a new user, remove a user and transfer data between users**

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

## 1. Manual changes to relationships

When any manual changes/removals on role relationships are made to any role records (i.e. property, landlord, tenancy, applicant, company and contact), this is logged in the Activity Feed - the example below shows the tenancy record

From Relationships panel:

- The **Tenancy Manager** is changed (*from Anna Graham to James Bridge*)

The screenshot shows the 'Select Negotiator' dialog box in the Tenancy Manager interface. The dialog has a search bar 'Type to filter by name' and a list of contacts. Under the 'London' category, 'James Bridge' is selected with a checkmark. Other contacts listed include Anna Graham, Karen Hammond, Kian Kettlewell, Malcolm Smith, Nathan Trainer, Nick Peterson, Oliver Adams, and Simon Crisp. Under the 'Reapit' category, there are no contacts listed. The dialog also has a 'Letter Name' field with 'James Bridge' entered, a 'Job Title' field with 'Negotiator' selected, and a 'Work' field with 'Add ...' selected. There are 'Cancel' and 'Select' buttons at the bottom right. The background shows the tenancy details for 'The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH - Registered 18/03/2016 - LON160006'. The 'Relationships' panel shows 'Tenancy Manager' as 'Anna Graham'.

- The change is logged in the Activity Feed

The screenshot shows the 'Activity Feed' panel in the Tenancy Manager interface. The feed has a search bar 'Type to filter activity' and a list of activities. The activity 'Tenancy Manager changed from Anna Graham to James Bridge by Kian Kettlewell (KMK)' is highlighted with a yellow box. Other activities include 'Tenancy Alert: Mr Vai wants all contact to go through his PA - Kim 07936 456789' (13/12/2022 by Kian Kettlewell), 'Rent Review: The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH' (01/02/2023 by Kian Kettlewell), 'Property Inspection: The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH' (13/01/2023 by Kian Kettlewell), and 'End Confirmed changed from Yes to No' (16/11/2022 by Kian Kettlewell). The background shows the tenancy details for 'The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH - Registered 18/03/2016 - LON160006'. The 'Relationships' panel shows 'Tenancy Manager' as 'James Bridge'.

- The **Property Inspector** is removed

**Relationships** (+)

Key Contact	<a href="#">Kian Kettlewell</a>	★
Office	London	
Inventory Clerk	<a href="#">Simon Crisp</a>	
Tenancy Manager	<a href="#">James Bridge</a>	
Property Inspector	<a href="#">Anna Graham</a>	✗

**Accounts**

**Accounts Functions**

Remove negotiator relationship

Graham to James Bridge (KMK).  
A moment ago by Kian Kettlewell

13/01/2023 11:30 AM - Property Inspection: The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH  
13/01/2023 by Kian Kettlewell

End Confirmed change  
16/11/2022 by Kian Kettlewell

- The change is logged in the Activity Feed

Rent £3,476.19 Monthly

Fees Letting: 7% Management: 5%

**Relationships** (+)

Key Contact	<a href="#">Kian Kettlewell</a>	★
Office	London	
Inventory Clerk	<a href="#">Simon Crisp</a>	
Tenancy Manager	<a href="#">James Bridge</a>	

**Accounts**

01/02/2023 by Kian Kettlewell

Property Inspector set as Anna Graham removed by Kian Kettlewell (KMK).  
A moment ago by Kian Kettlewell

Tenancy Manager changed from Anna Graham to James Bridge by Kian Kettlewell (KMK).  
5 minutes ago by Kian Kettlewell

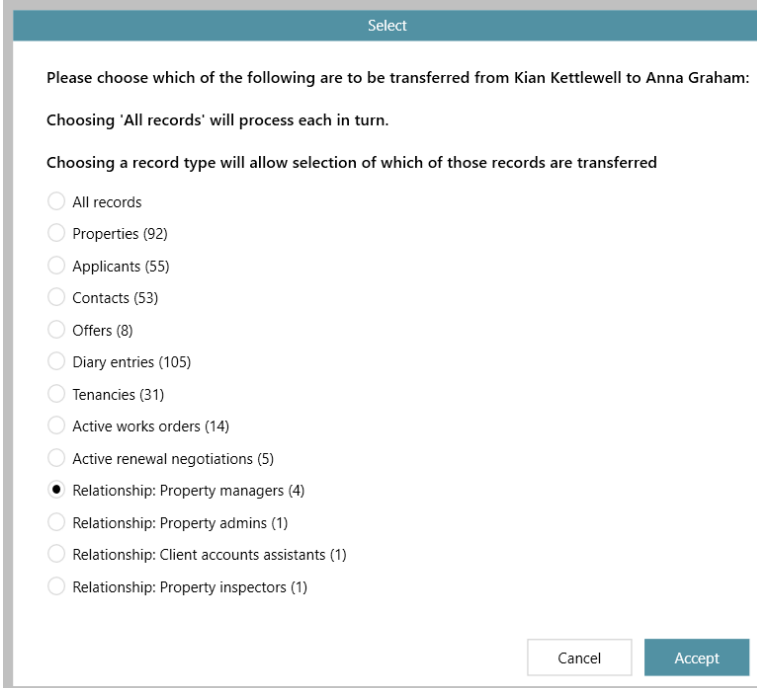
13/01/2023 11:30 AM - Property Inspection: The Garden Flat, 12 Redcliffe Gardens, South Kensington, SW10 9BH

## 2. Changes to relationships made via the Negotiator and User Setup tool

When any changes to role relationships are made via the Negotiator and User Setup screen, this is logged in the Activity Feed

From the Negotiator and User Setup screen - carry out the transfer as usual:

- Select the user to transfer from - click **Transfer** - select the user to transfer to
- Select the **Relationship** that you wish to transfer to the selected user  
*In this example, the transfer function is being used to transfer Kian Kettlewell's property manager relationships to Anna Graham*



The screenshot shows a 'Select' dialog box with the following content:

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.

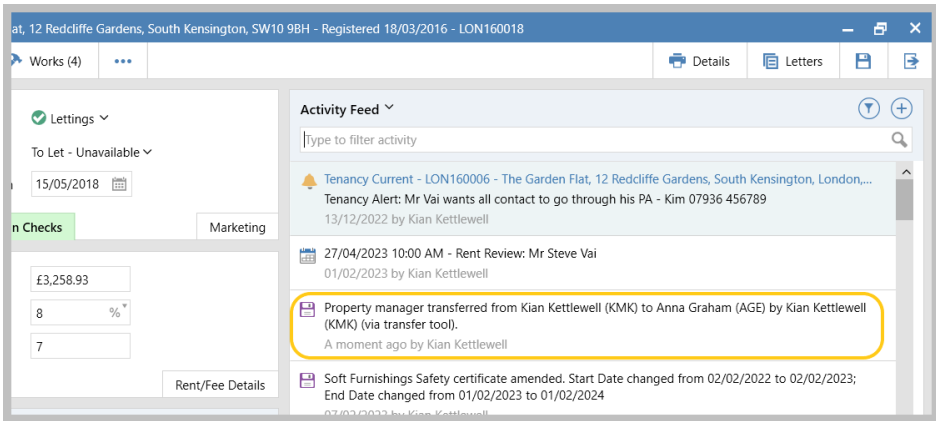
Choosing a record type will allow selection of which of those records are transferred

- All records
- Properties (92)
- Applicants (55)
- Contacts (53)
- Offers (8)
- Diary entries (105)
- Tenancies (31)
- Active works orders (14)
- Active renewal negotiations (5)
- Relationship: Property managers (4)
- Relationship: Property admins (1)
- Relationship: Client accounts assistants (1)
- Relationship: Property inspectors (1)

Buttons: Cancel, Accept

When the transfer is complete:

- The Activity Feed on all properties involved in the relationship transfer contain detail of the change
- This includes information on how the relationship transfer was carried out i.e. **(via transfer tool)** is added to the end of the note



The screenshot shows the Activity Feed for a property listing. The feed contains several entries, with the following entry highlighted in yellow:

Property manager transferred from Kian Kettlewell (KMK) to Anna Graham (AGE) by Kian Kettlewell (KMK) (via transfer tool).  
A moment ago by Kian Kettlewell

Other entries in the feed include:

- Tenancy Current - LON160006 - The Garden Flat, 12 Redcliffe Gardens, South Kensington, London,...
- Tenancy Alert: Mr Vai wants all contact to go through his PA - Kim 07936 456789
- 13/12/2022 by Kian Kettlewell
- 27/04/2023 10:00 AM - Rent Review: Mr Steve Vai
- 01/02/2023 by Kian Kettlewell
- Soft Furnishings Safety certificate amended. Start Date changed from 02/02/2022 to 02/02/2023; End Date changed from 01/02/2023 to 01/02/2024
- 07/02/2023 by Kian Kettlewell

# Accounts\*

## Holding deposit expiry date

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

From AgencyCloud 12.162+, in addition to the number of warning days for a holding deposit, an expiry date is also displayed to flag when a holding deposit has been held too long

The expiry date can be changed, which then updates the number of warning days (and vice versa)

When an expiry date has been changed, this is logged in the Activity Feed for the tenancy, plus information on holding deposit expiry dates can be viewed via the Organiser

A mail merge code is also available via the Letter Template Editor to allow the holding deposit expiry date to be included in letters/documents & email templates

### 1. View & update holding deposit expiry date

From tenancy:

- To the right of **Holding deposit**, click link beside **Held**

Ms Violet Hughes - 164 Noble Lane - Registered 27/02/2023 -

Details Financial & Extensions Agreement Pre-Tenancy Management Post-Tenancy

Rent instalments start	31/01/2023	Invoicing	Automatic
Rent invoiced up to	29/04/2024	Send invoices	Not sent
Deposit type	Select	Held by	Select
Total deposit	£0.00	Deposit	<input type="checkbox"/> On interest
Holding deposit	£200.00	Held	£200.00 (13 Days)
Target float	£0.00	Float held	£0.00
Initial rent	£200.00	p/w	Payable Monthly 0 days in arrears

- Click link beside **Warn days** for option to **Edit expiry date**  
**Warn days** displays the current expiry date for the holding deposit along with the number of days set (previously only the number of warning days was shown)

**Holding Deposit Details - Ms Violet Hughes (164 Noble Lane)**

<b>Held</b>	£200.00 (13 Days)
<b>Invoiced</b>	£200.00 on 01/03/2023
<b>Paid</b>	£200.00 (£0.00 Cleared) on 01/03/2023
<b>Credited</b>	No credit notes
<b>Warn days</b>	<a href="#">8 days until 09/03/2023</a>

<b>Refunds</b>	
<a href="#">Refunds / Allocate holding deposit</a>	Nothing refund

- Edit warning days
- Edit expiry date**
- Reset to default

- Enter the new expiry date and click **Accept**

**Enter Date**

Set holding deposit expiry date

- The date and number of days is updated

Holding Deposit Details - Ms Violet Hughes (164 Noble Lane)
✕

<b>Held</b>	£200.00 (13 Days)
<b>Invoiced</b>	£200.00 on 01/03/2023
<b>Paid</b>	£200.00 (£0.00 Cleared) on 01/03/2023
<b>Credited</b>	No credit notes
<b>Warn days</b>	<a href="#">16 days until 17/03/2023</a>

**Refunds**

[Refunds / Allocate holding deposit](#)    Nothing refunded

Changing the number of warning days via the **Edit warning days** option (shown above) will update the expiry date accordingly

## 2. Change to expiry date logged in Activity Feed

From tenancy:

- Details of changes to the number of warning days and the expiry date is logged

Ms Violet Hughes - 164 Noble Lane - Registered 27/02/2023 - BED230704

Details    **Financial & Extensions**    Agreement    Pre-Tenancy    Management    Post-Tenancy
Letters    Print

Rent instalments start	31/01/2023	Invoicing	Automatic ▾
Rent invoiced up to	29/04/2024	Send invoices	Not sent
Deposit type	Select ▾	Held by	Select ▾
Total deposit	£0.00	Deposit	<input type="checkbox"/> On interest
Holding deposit	£200.00	Held	£200.00 (13 Days)
Target float	£0.00	Float held	£0.00

**Activity Feed** ▾

Type to filter activity

- Holding deposit warning days changed from 8 to 16 and holding deposit expiry date changed from 09/03/2023 to 17/03/2023  
A moment ago by Morve ↑ [Show less](#)
- End date changed from 16/12/2023 to 10/08/2024

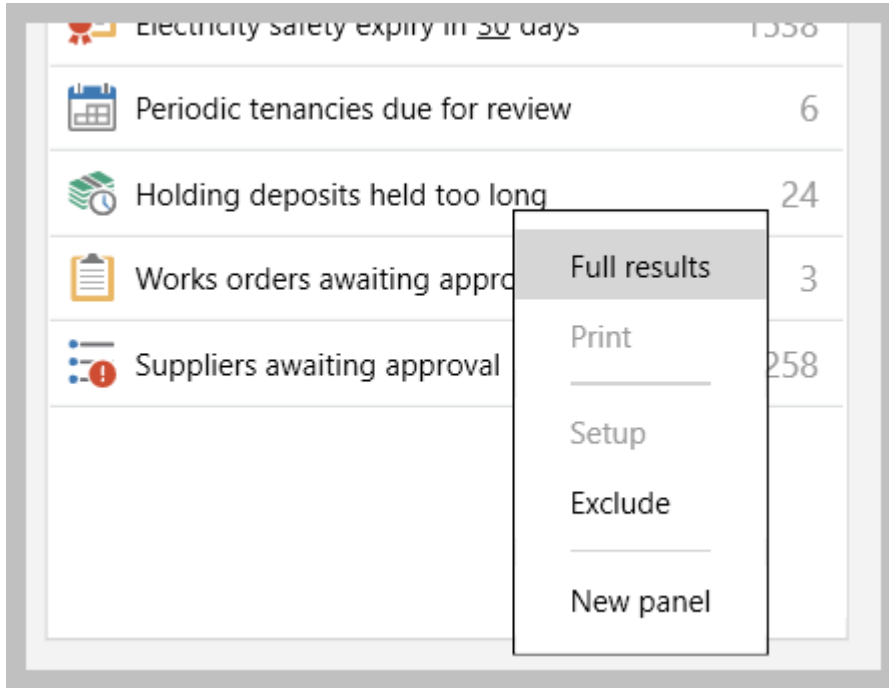


### 3. View holding deposit expiry date via Property Management grid

Holding deposit expiry dates are included on the *holding deposits held too long* grid on the Organiser

From Organiser, Property Management panel:

- Right-click over **Holding deposits held too long** and select **Full results**



The **Holding deposit expiry** column is displayed by default - grid functions can be used to sort or filter by date

- To sort the list, click the column heading
- To filter the list by date, click to the right of the column heading (to view filter icon) and enter the required date range

Tenancy Search - 24 listed							
Property	Tenant	Status	Rent p/w	Manager	Holding deposit expiry	Ltd to check out	Inventory clerk
Q, 40 Kirkby Road, W, E, R, T	Mr Eric Cohen and Mrs...	Tenancy Current	£13.81	Tom Lewell	02/03/2023		
60 Beaconsfield Street, Bedford	Tara Sparrow	Tenancy Current	£250	Tom Lewell	06/02/2023		
TEST, 11 Bedford Street	Mr Benjamin Smith1, Mr...	Tenancy Current	£156	Reapit	16/01/2023		
B, 607 Black St, Whitehorse	Mr Test test	Tenancy Current	£1,000	Reapit	01/03/2023		
22 Blenheim Way, Bredon	Mr Marco Falcone and...	Tenancy Cancelled	£173.08	David Bou...	16/03/2022		
15 Brotherton Avenue, Redditch	Ms Amira Gardner	Tenancy Finished	£260.22	Reapit	21/02/2022	No	

**Holding deposit expiry**

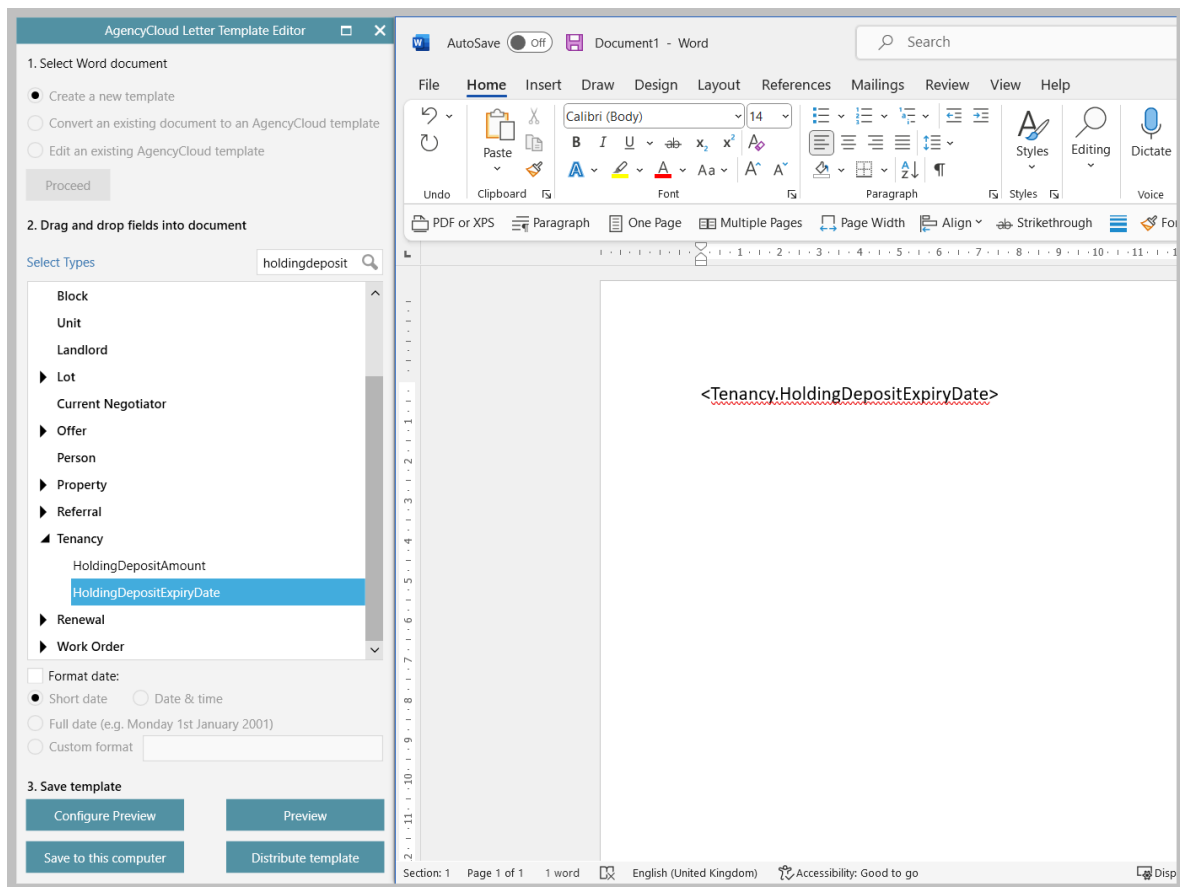
// to //

#### 4. Holding deposit expiry date merge code in Letter Template Editor

A mail merge code is available via the Letter Template Editor - this allows the holding deposit expiry date to be included in letters/documents & email templates

From Letter Template Editor:

- In the search field, enter **holdingdeposit** and press enter
- This helps to locate the code titled **HoldingDepositExpiryDate** (within **Tenancy** section)
- Click and drag **HoldingDepositExpiryDate** to the required location on the Word document to view the merge code: **<Tenancy.HoldingDepositExpiryDate>**  
*The code can be copied for use in email templates*



For more information on using the Letter Template Editor, see Knowledge Base guide titled: ***Using Letter Template Editor to create, edit and distribute letter templates***

# Block Management\*\*

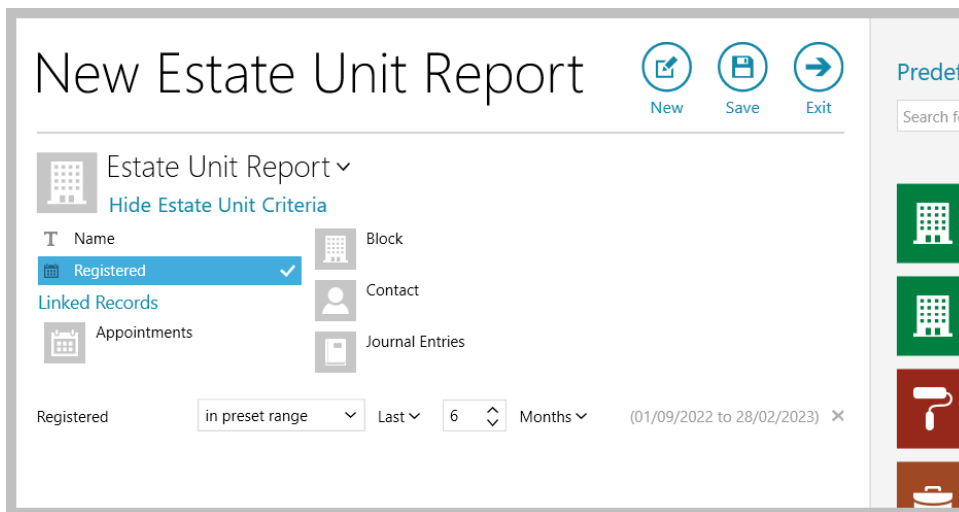
## Block Management Power Report update to unit reports

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

Further updates to Block Management reporting have been made in AgencyCloud 12.162 when carrying out a unit report to allow exporting to custom grids

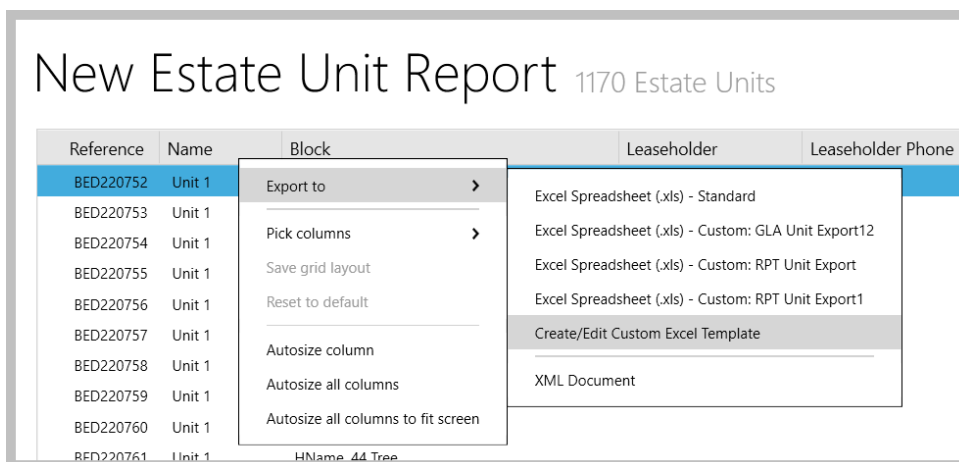
From Power Reports:

- Select report type as **Unit**, enter required criteria and click **Run Report**



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



In AgencyCloud 12.161, this update was added to estate reporting, see Knowledge Base guide titled: **Block Management Power Report updates**