Reapit AgencyCloud 12.162 release notes

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

To access the release notes via the Knowledge Base, click here

Contents

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

Configuration options are available to Enterprise customers only

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

General

New UI round-up: v12.162

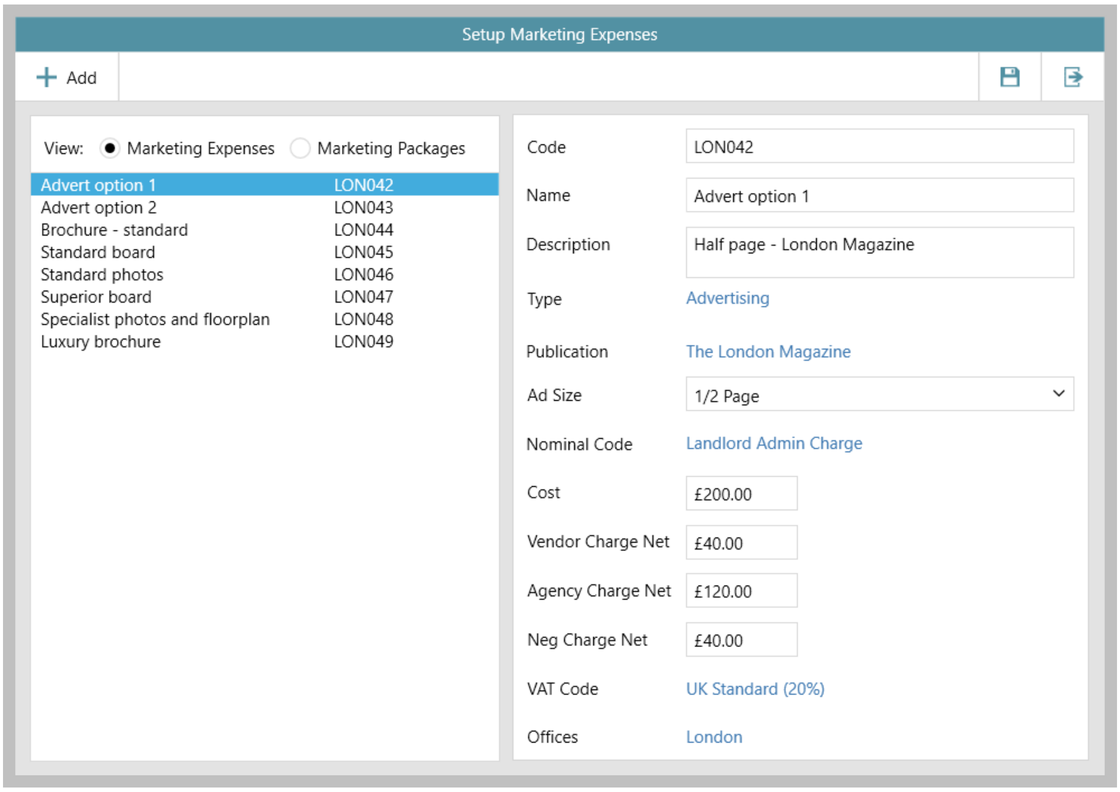
This guide has been reviewed against our global client base and classed as relevant to all regions

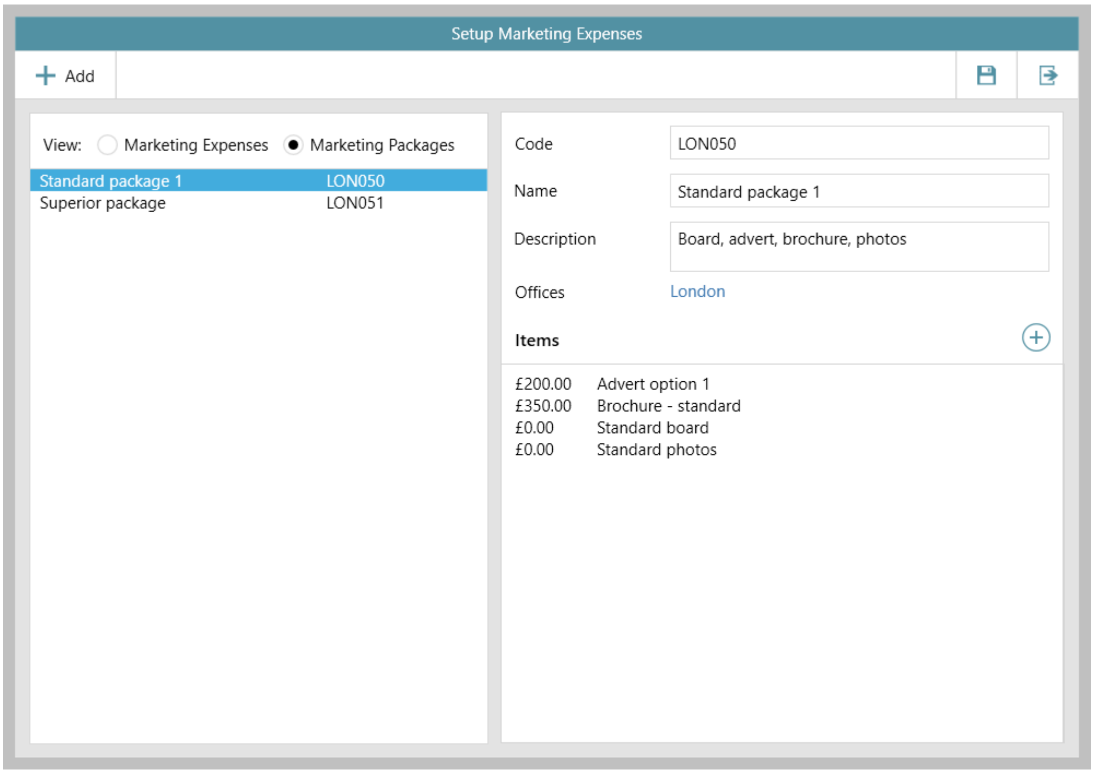
As part of the new user interface (UI) project, in 12.162 the following screen has been redesigned to bring it in line with previously redesigned screens

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 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:

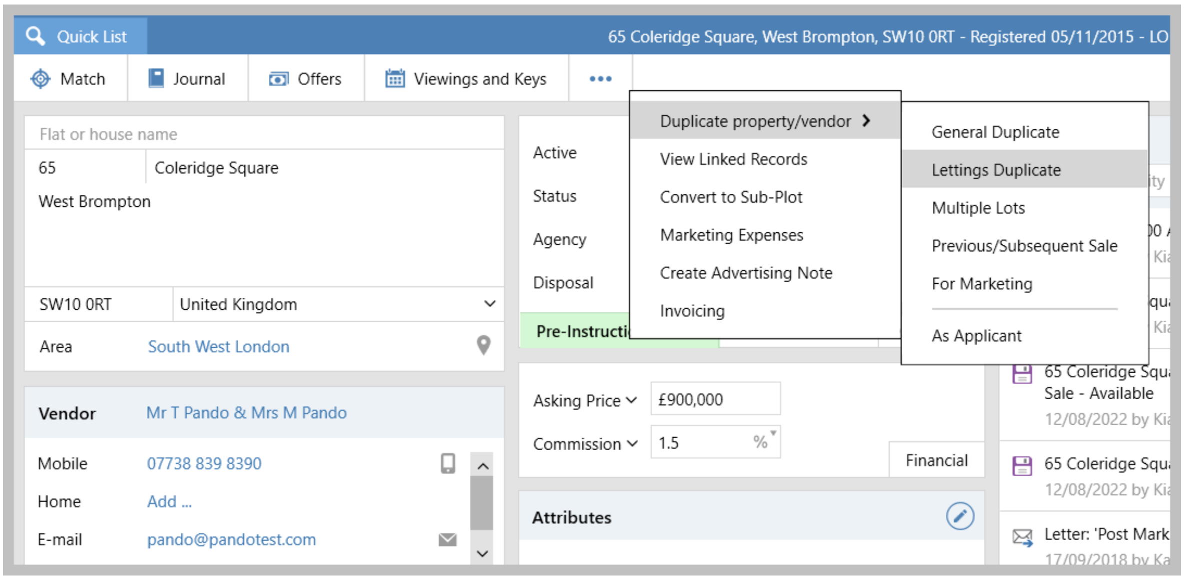
- if a lettings property needed to be converted to a sales property and lettings marketing stopped - the lettings property record would first need to be dual-marketed as both sales and lettings, then lettings marketing would need to be stopped on that record
- if needing to market a lettings property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

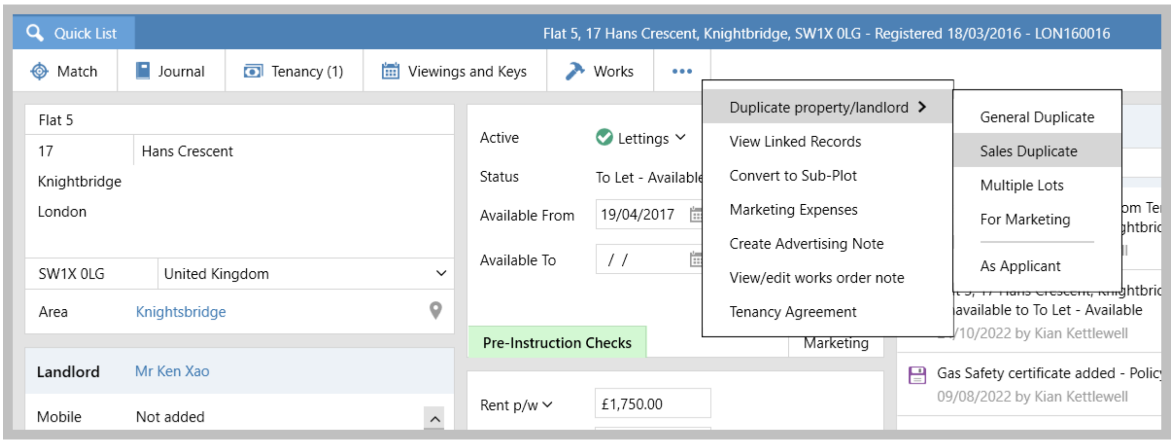
- Click ellipsis (**...**)
- Select **Duplicate property/vendor** and click **Lettings Duplicate**



1b. Lettings property

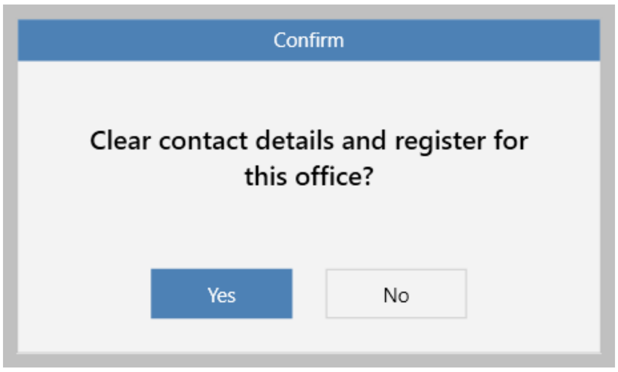
From lettings property:

- 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

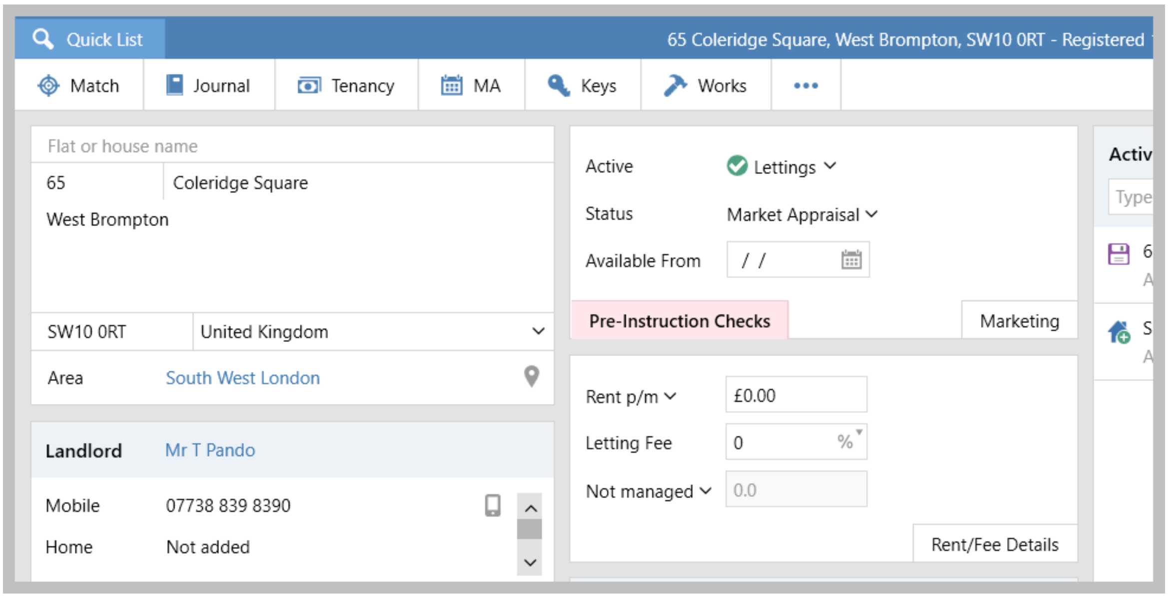


- A prompt to copy the property pictures and/or room detail will also be offered
- When duplicating a sales property as a lettings property, enter landlord information
- When duplicating a lettings property as a sales property, enter vendor information

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

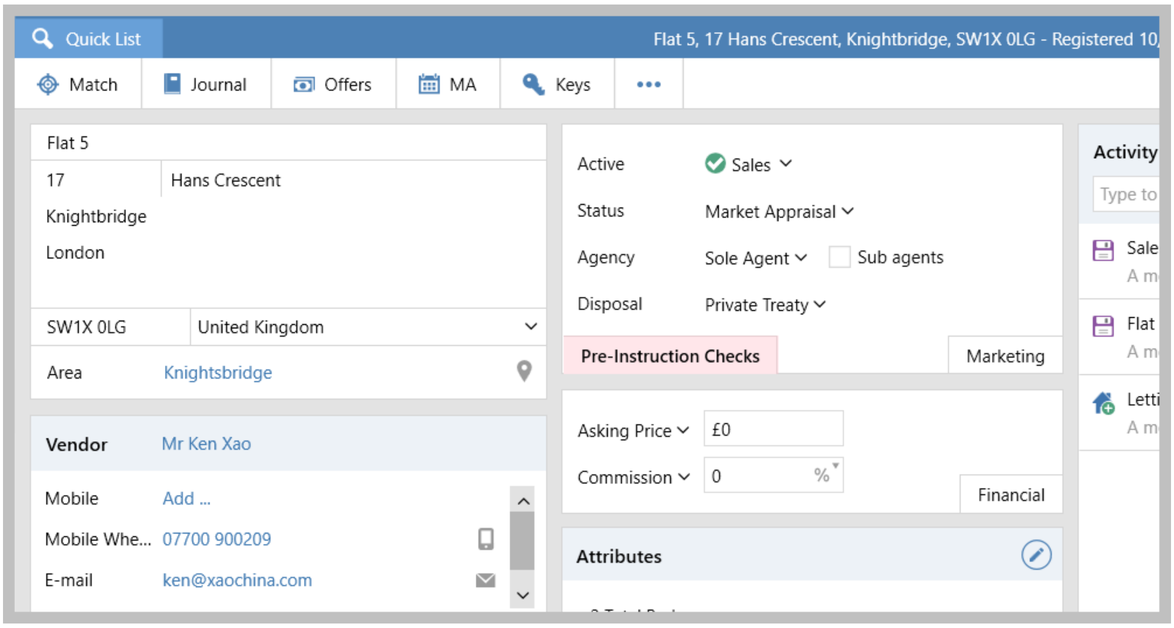
3a. Duplicated sales property as a lettings property

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



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 **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

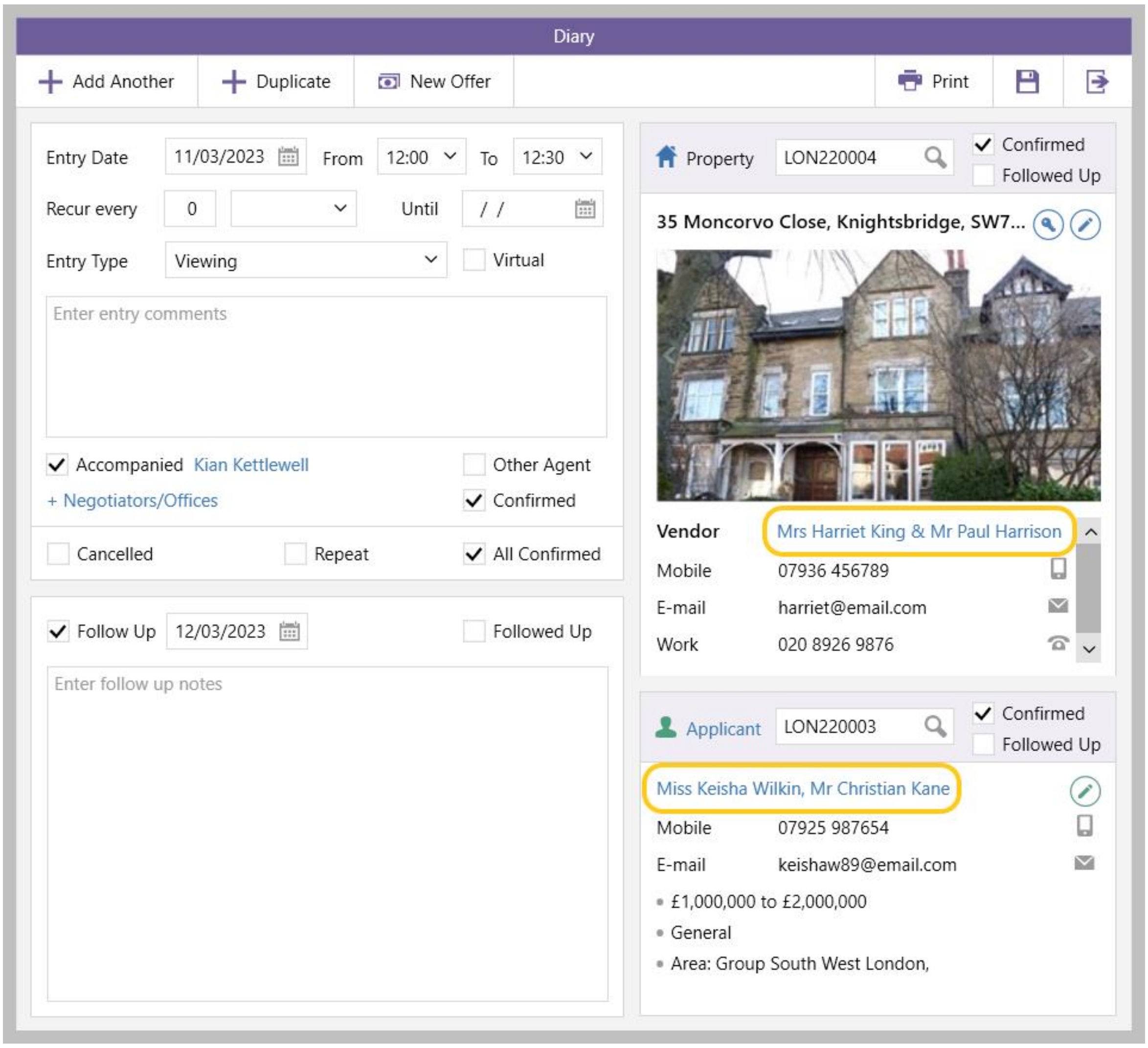
From AgencyCloud 12.162+, the contact details for all parties involved in an appointment are accessible from the diary appointment screen (prior to this, only the main vendor/landlord/tenant/applicant details were shown)

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:

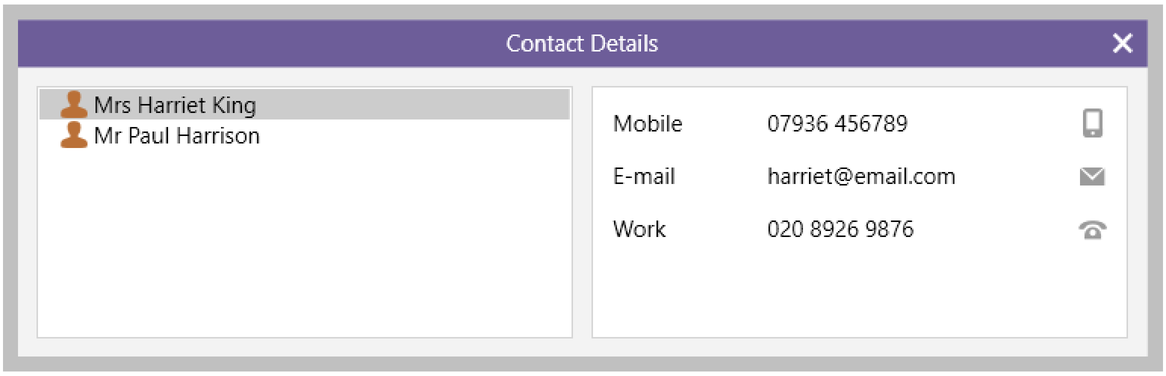
- When more than one vendor/landlord or applicant/tenant is present on a property/applicant/tenancy record, their names will be shown on the appointment screen as a link



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

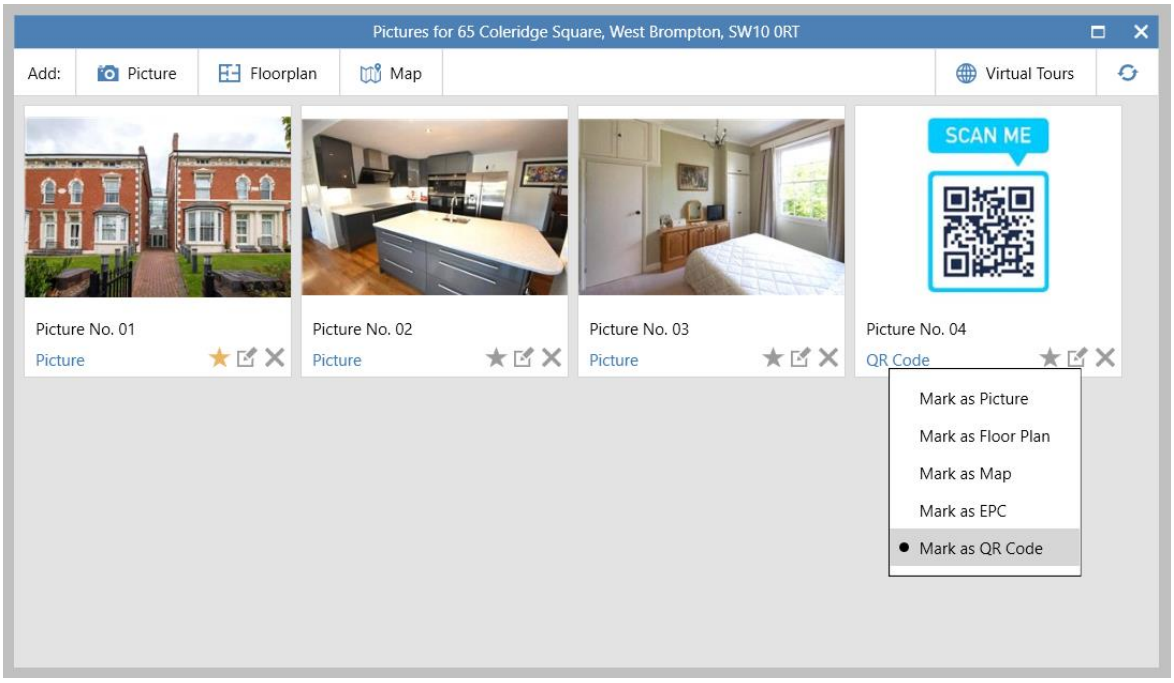
This guide has been reviewed against our global client base and classed as relevant to all regions

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

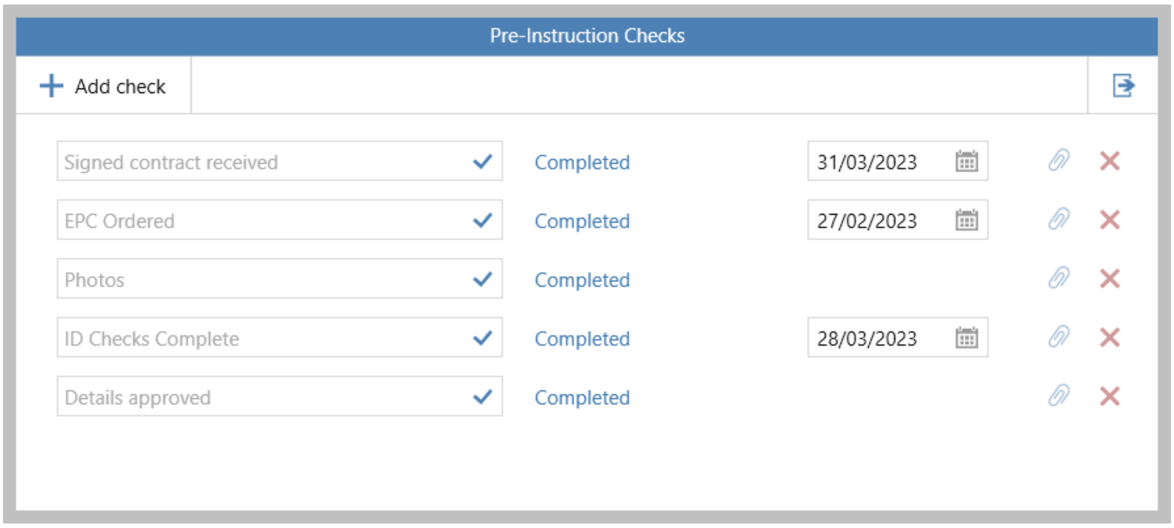
To enable this configuration option, contact Reapit Support

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



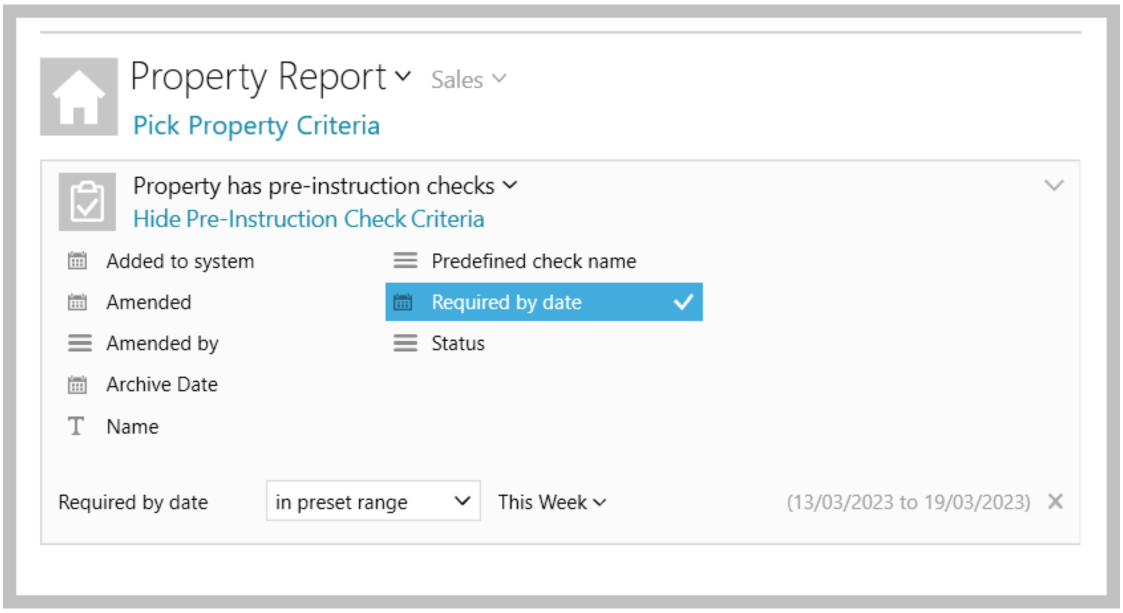
Items with a 'required by' date option is dependent on configuration (see introduction)

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



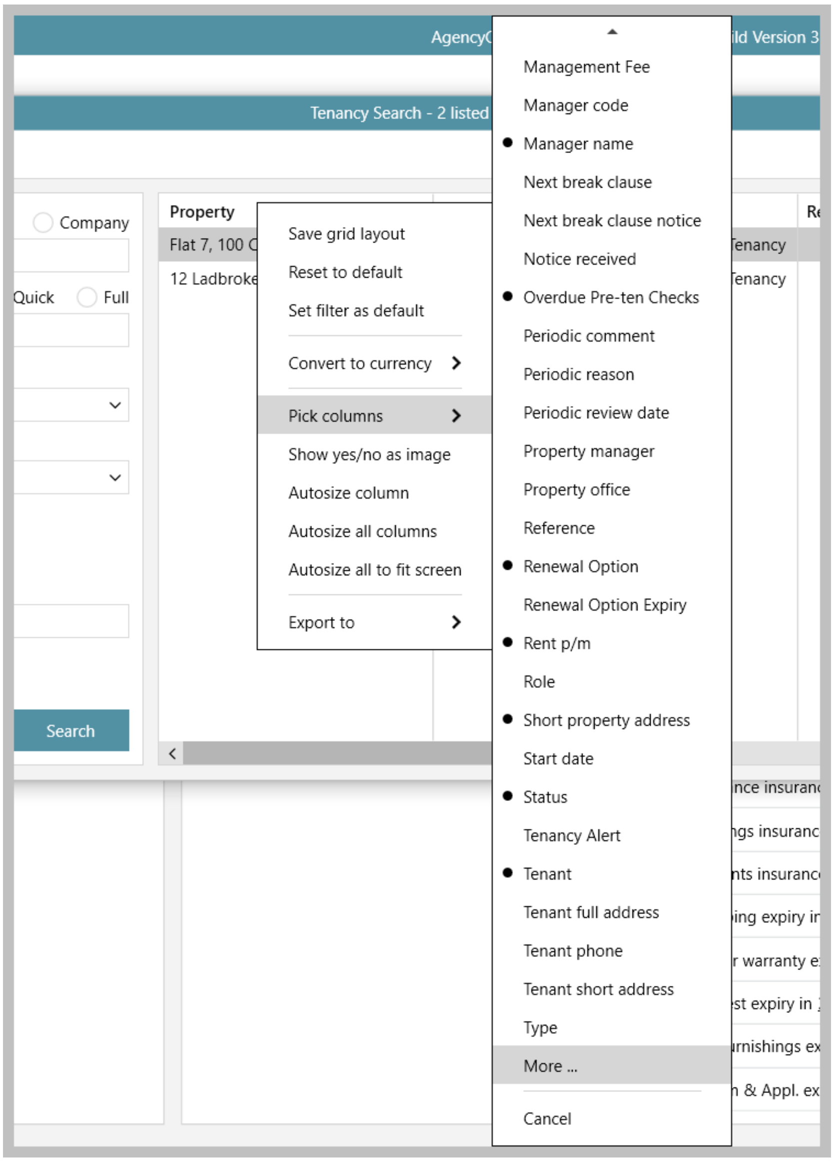
3. Show overdue checks in grids

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

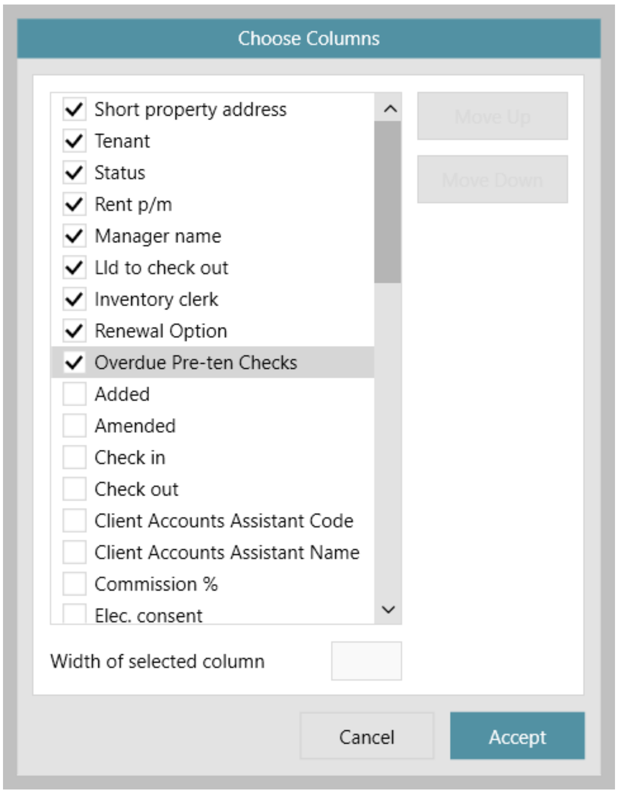
A column showing overdue check information needs to be added & saved to the relevant grids first

From the grid:

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



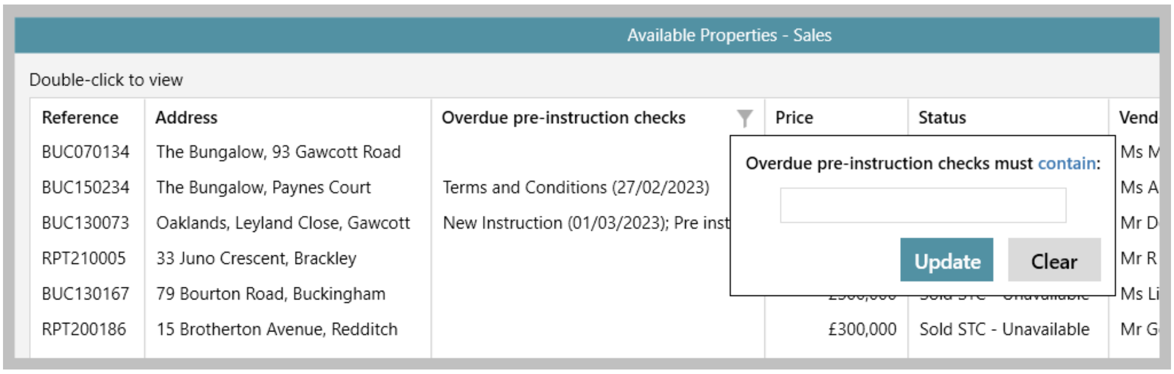
- Tick **Overdue <xx> Checks** (**xx** = the type of check relevant to the grid) and click **Accept**



- 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



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

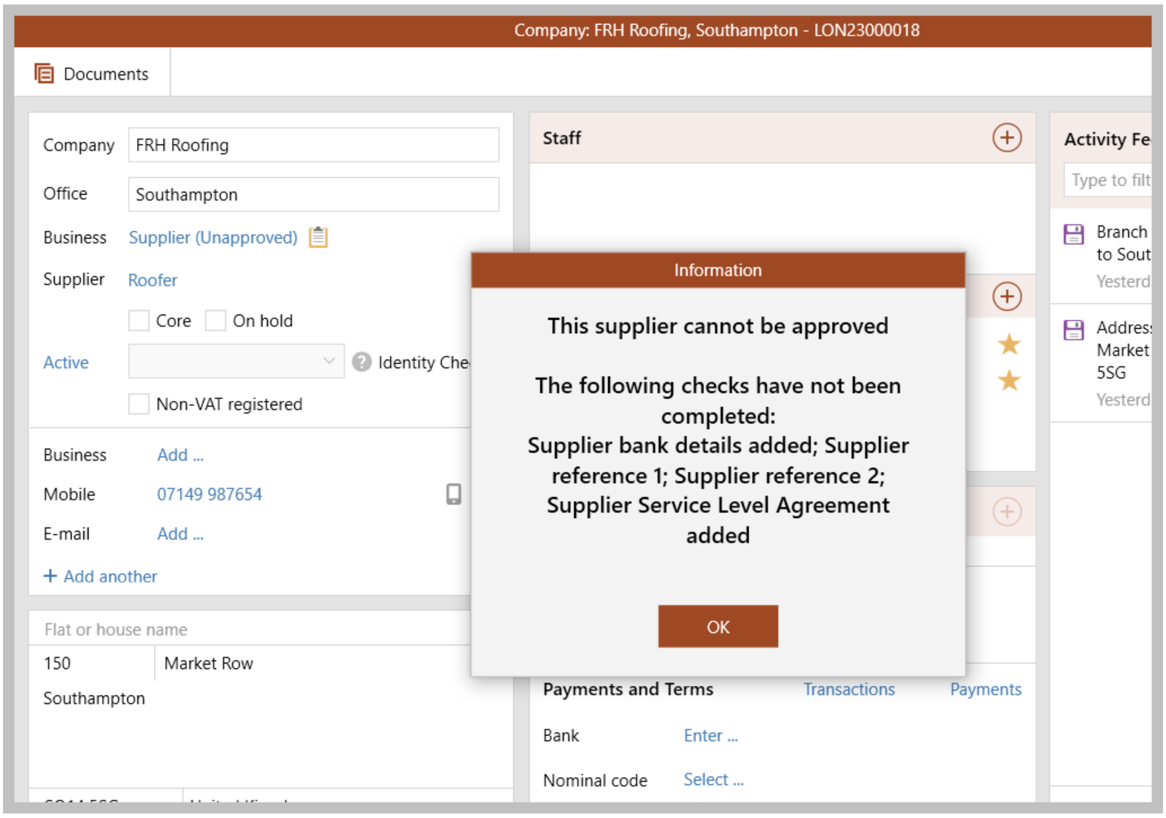
To enable any of the configuration options outlined in this section, contact Reapit Support

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

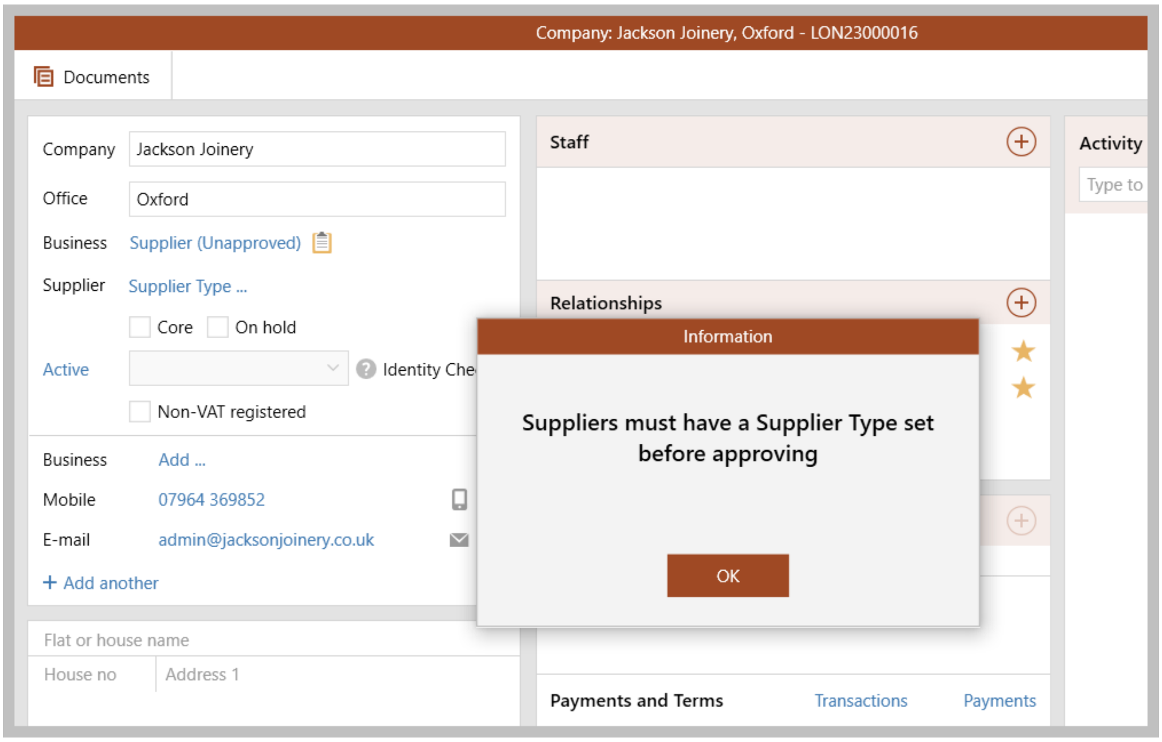


For more information on supplier checklist functionality, see Knowledge Base guide titled: ***Supplier checklist - configuration option***

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 be specified

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



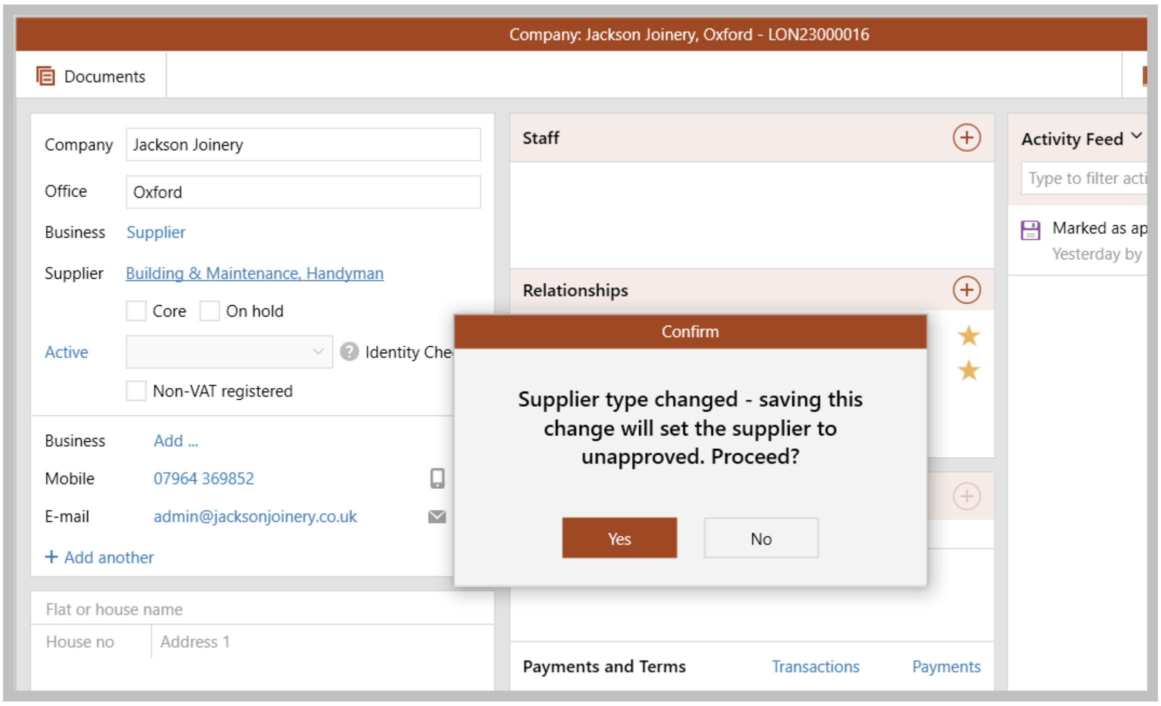
3. Supplier requires re-approval when changes made - configuration option

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



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)

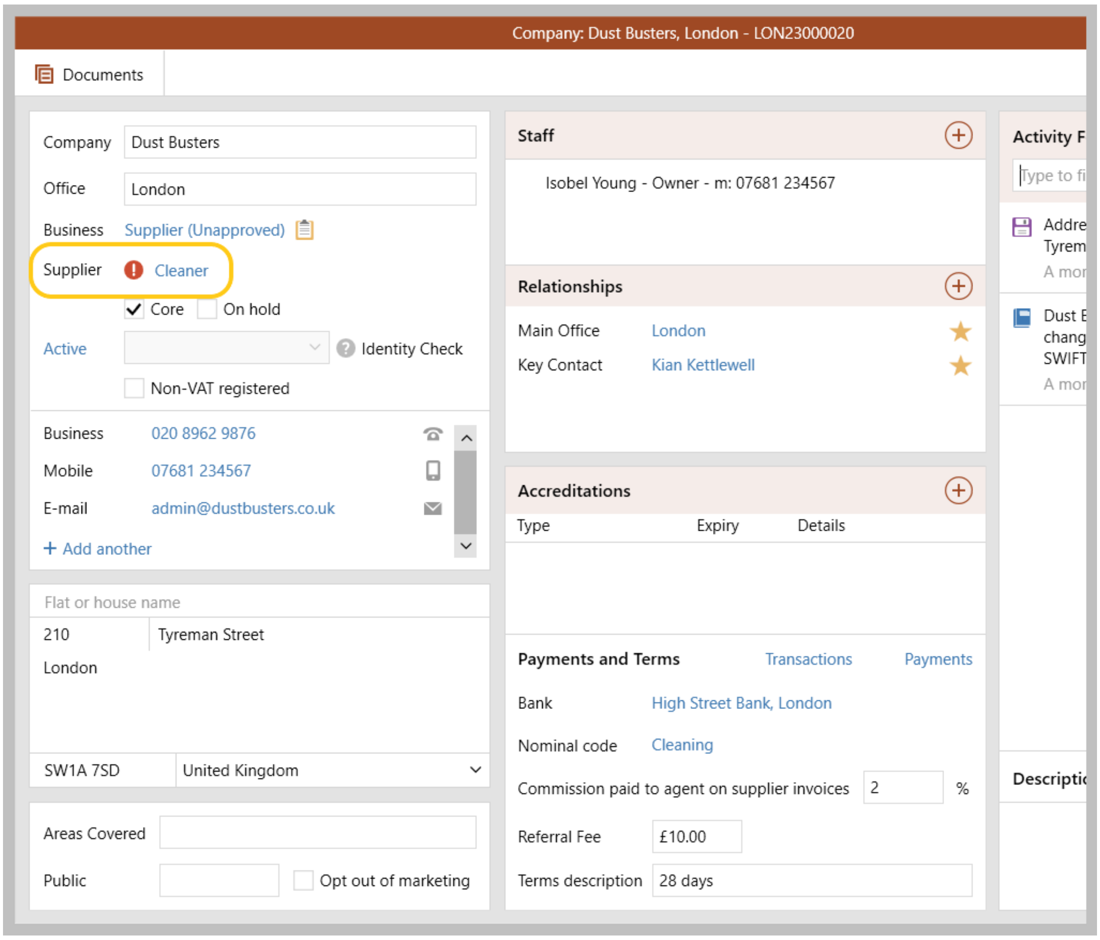
For more information on core suppliers, see Knowledge Base guide titled: ***Add core suppliers - configuration option***

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

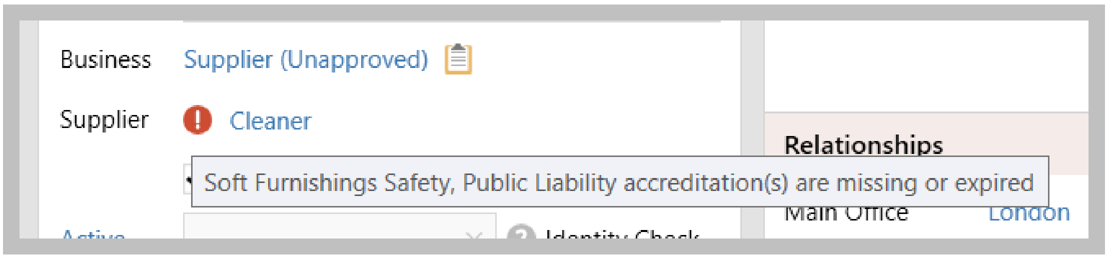
Configuration is available which prevents a supplier from being marked as approved until the default accreditation types for the supplier type have been entered and are valid/in date

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

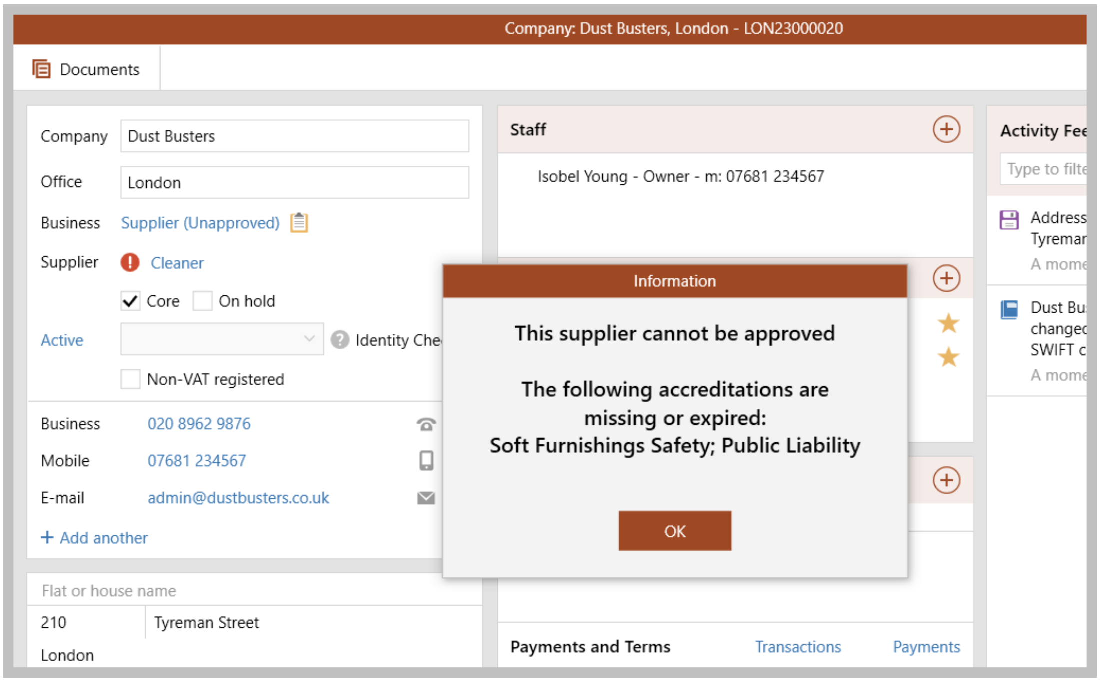
- An exclamation mark icon is displayed beside supplier type



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



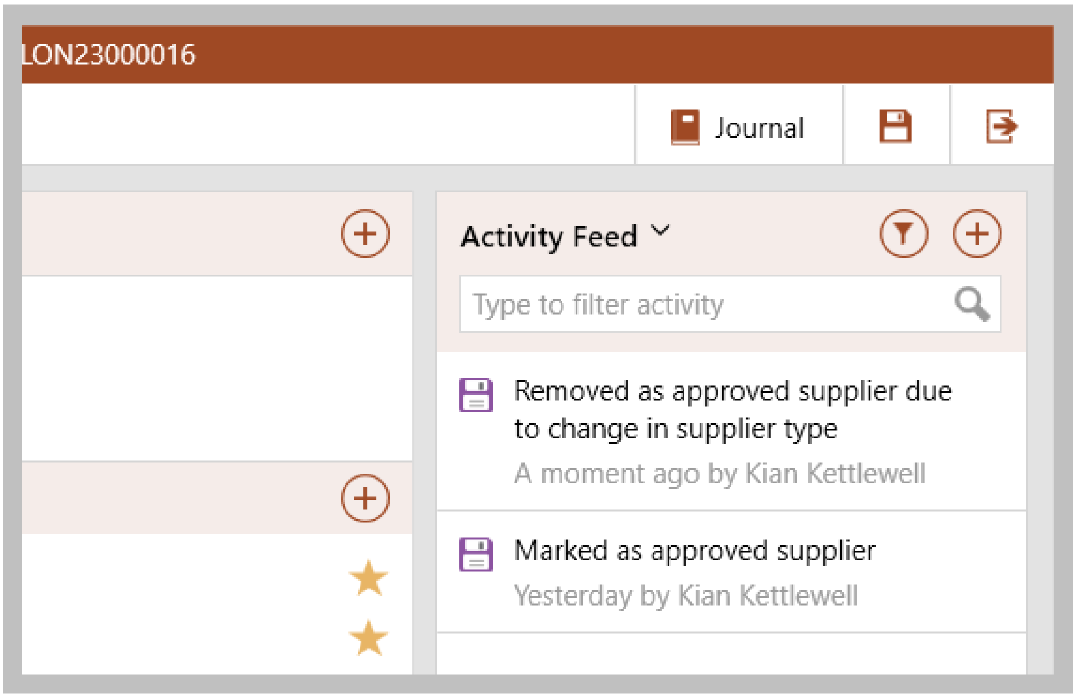
- If attempting to approve the supplier, a prompt will be displayed



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

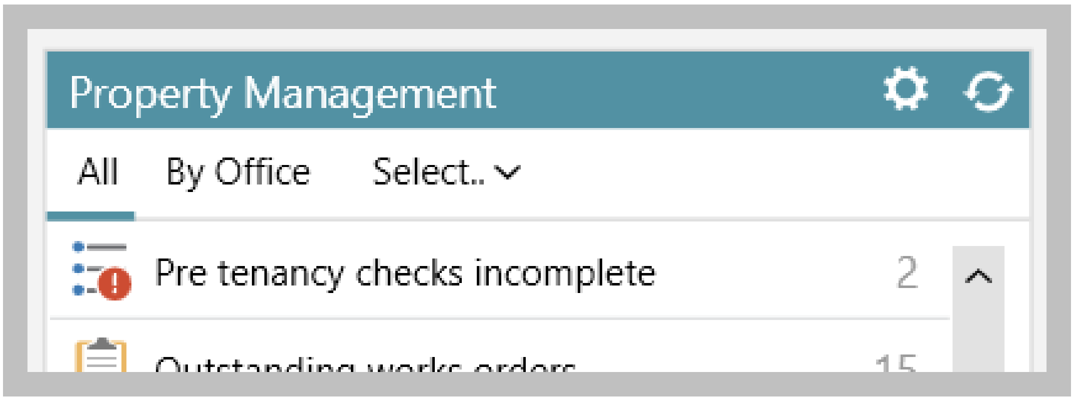
6b. Add new columns to suppliers awaiting approval grid

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

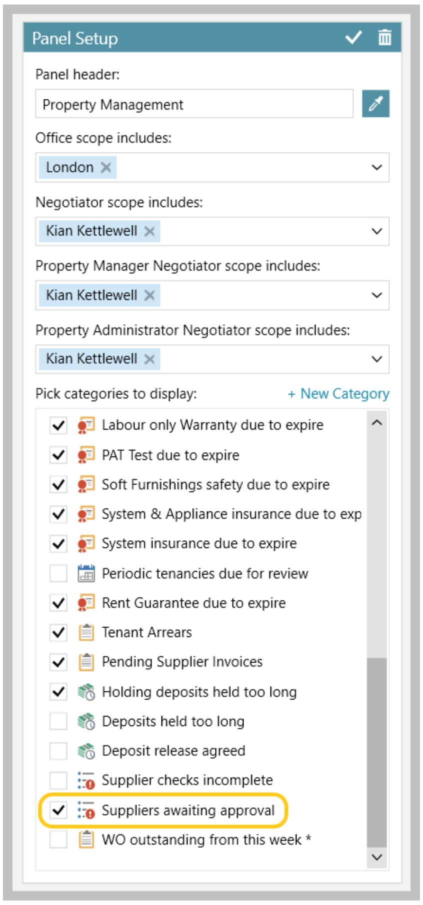
When using supplier approval functionality, the Property Management panel on the Organiser can flag and display list of suppliers awaiting approval

To add suppliers awaiting approval to the Property Management panel:

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

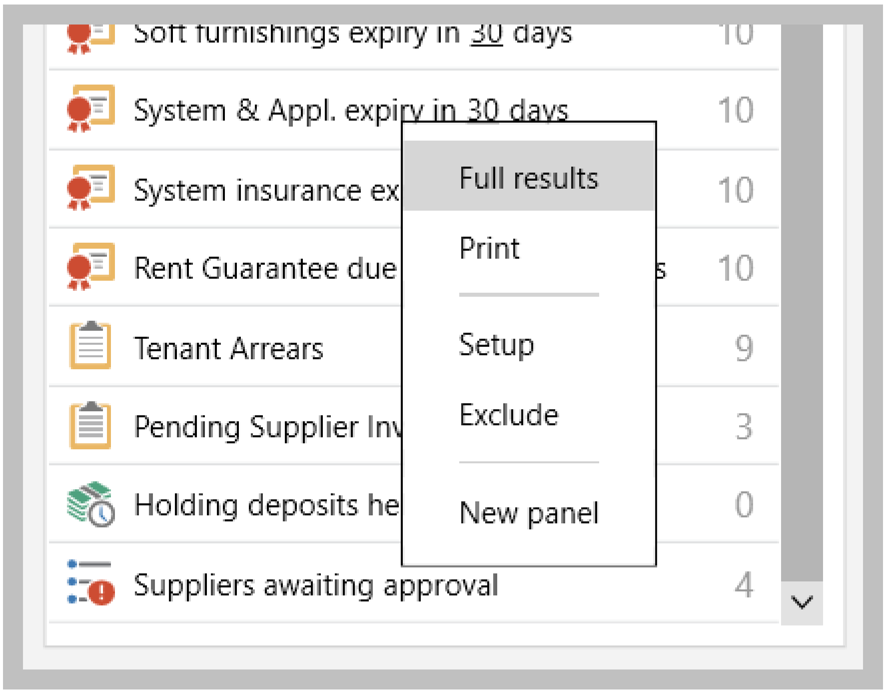


- Tick **Suppliers awaiting approval** and click tick icon (top right) to save

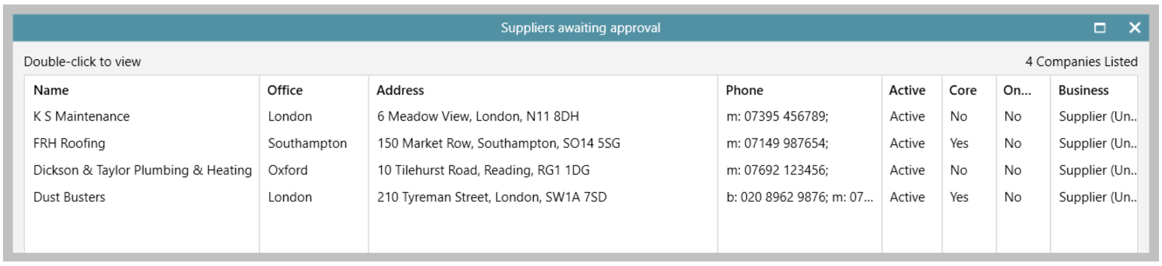


Suppliers awaiting approval will now be displayed on the Property Management panel:

- 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:

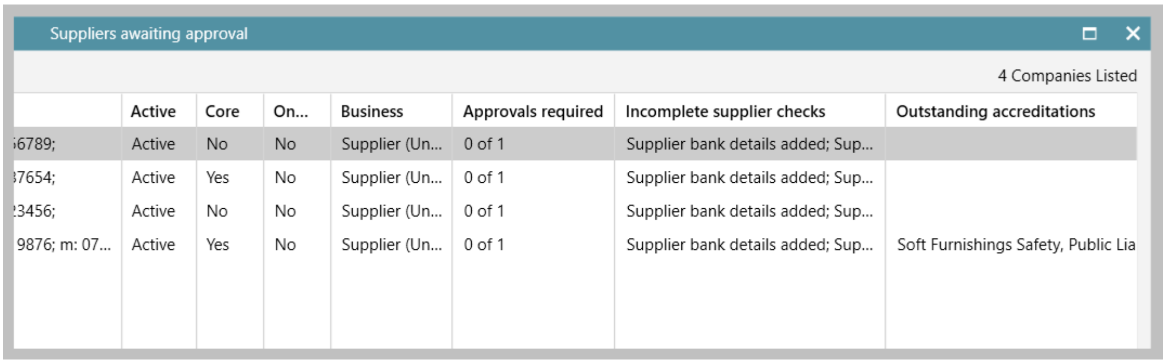
- Right-click over the column headings, select **Pick columns** then select the required columns:
  - **Incomplete supplier checks**
  - **Approvals required**
  - **Outstanding accreditations**

- 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



	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...	
37654;	Active	Yes	No	Supplier (Un...	0 of 1	Supplier bank details added; Sup...	
23456;	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***

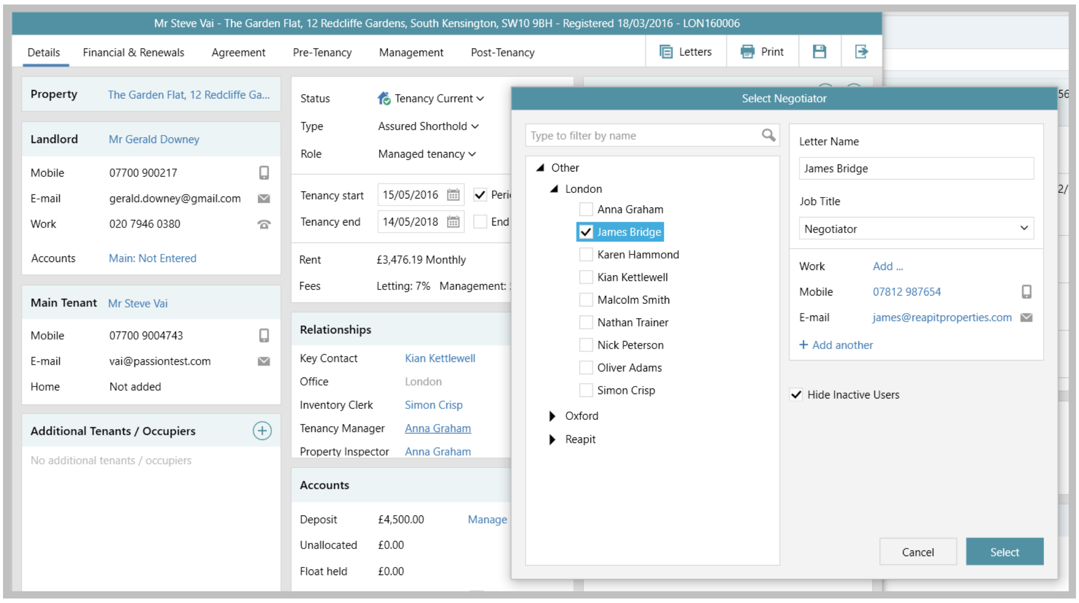
A key contact can request access to the Negotiator and User Setup screen by contacting Reapit Support

1. Manual changes to relationships

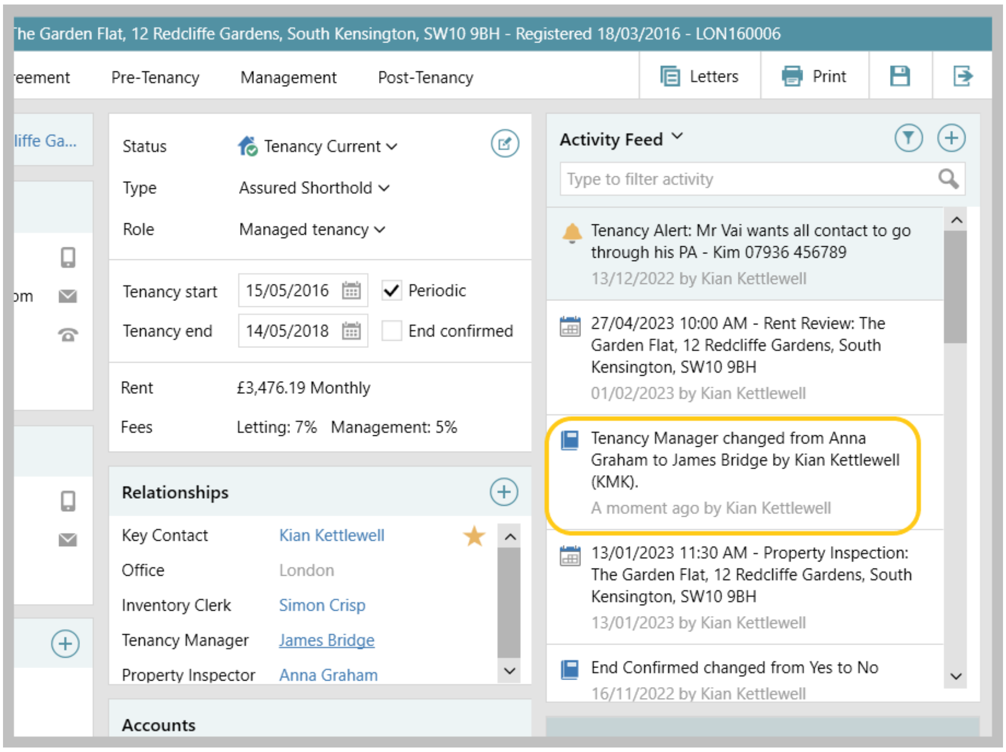
When any manual changes/removals on role relationships are made to any role records (i.e. property, landlord, tenancy, applicant, company and contact), this is logged in the Activity Feed - the example below shows the tenancy record

From Relationships panel:

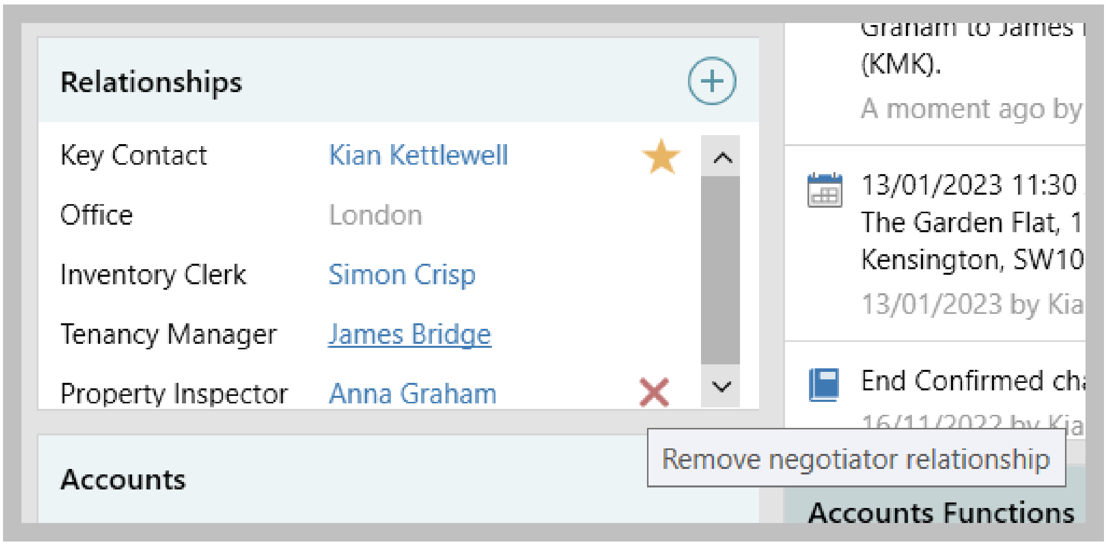
- The **Tenancy Manager** is changed *(from Anna Graham to James Bridge)*



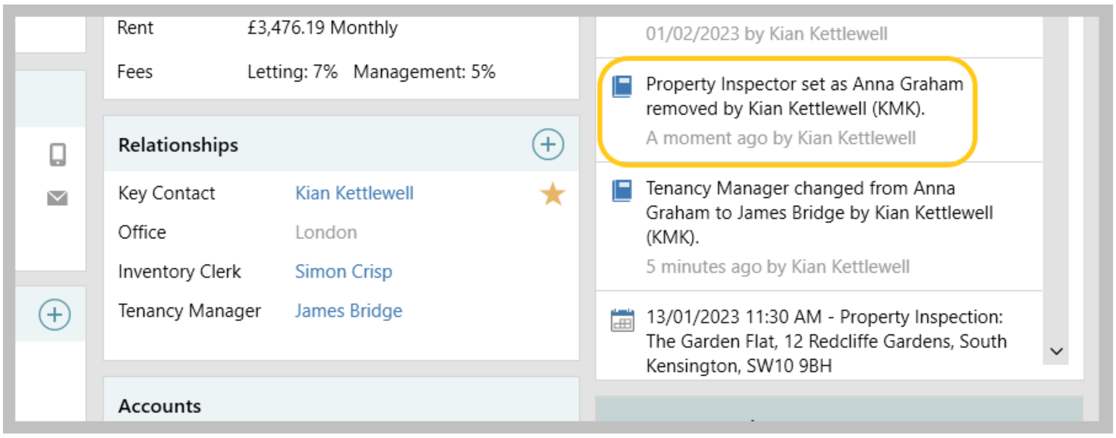
- The change is logged in the Activity Feed



- The **Property Inspector** is removed



- The change is logged in the Activity Feed

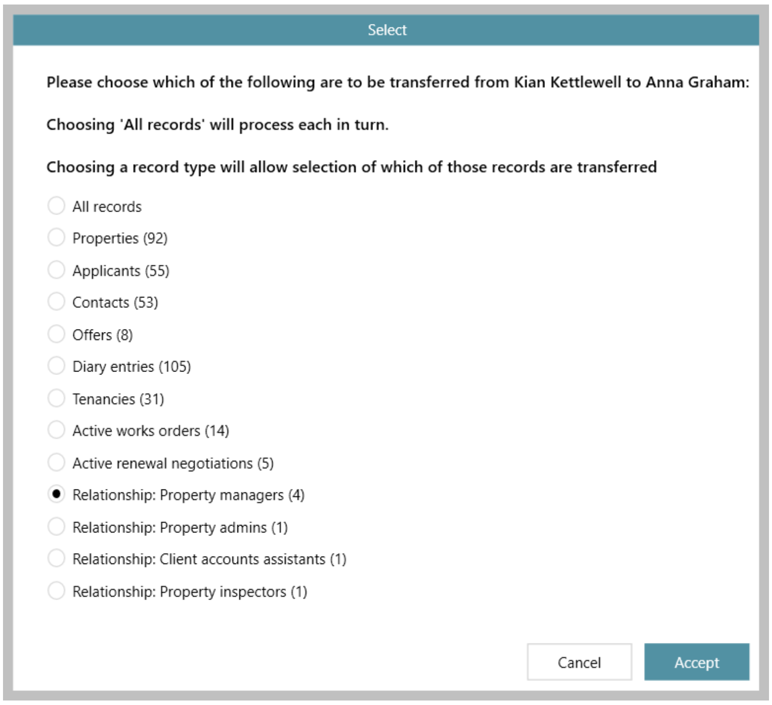


2. Changes to relationships made via the Negotiator and User Setup tool

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

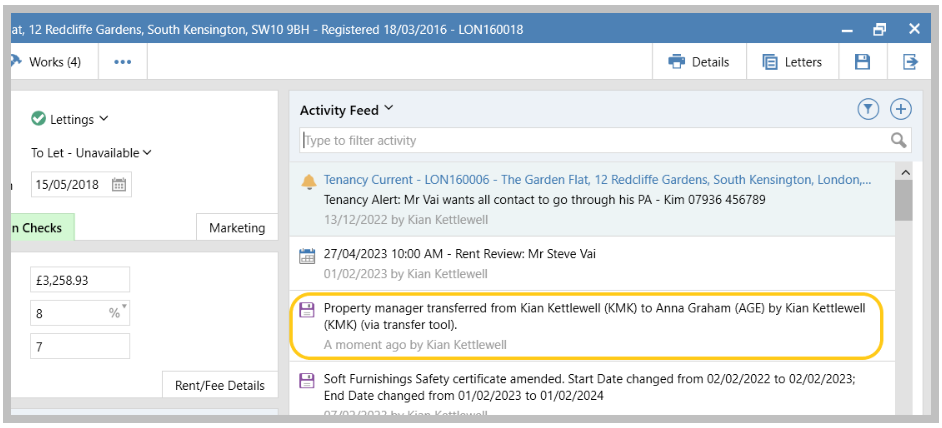
From the Negotiator and User Setup screen - carry out the transfer as usual:

- 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



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



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)

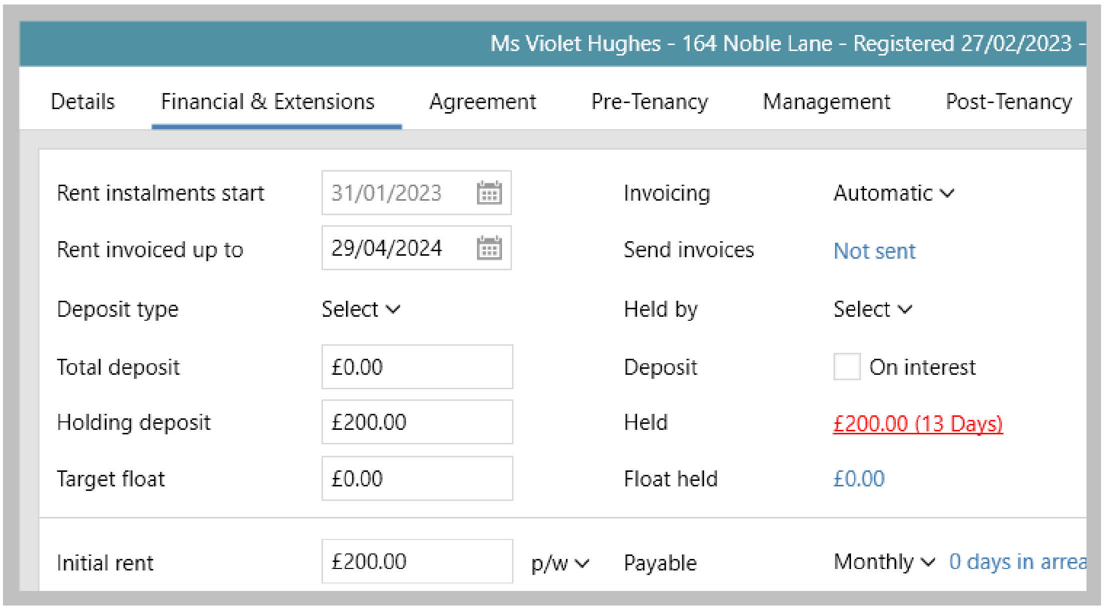
When an expiry date has been changed, this is logged in the Activity Feed for the tenancy, plus information on holding deposit expiry dates can be viewed via the Organiser

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

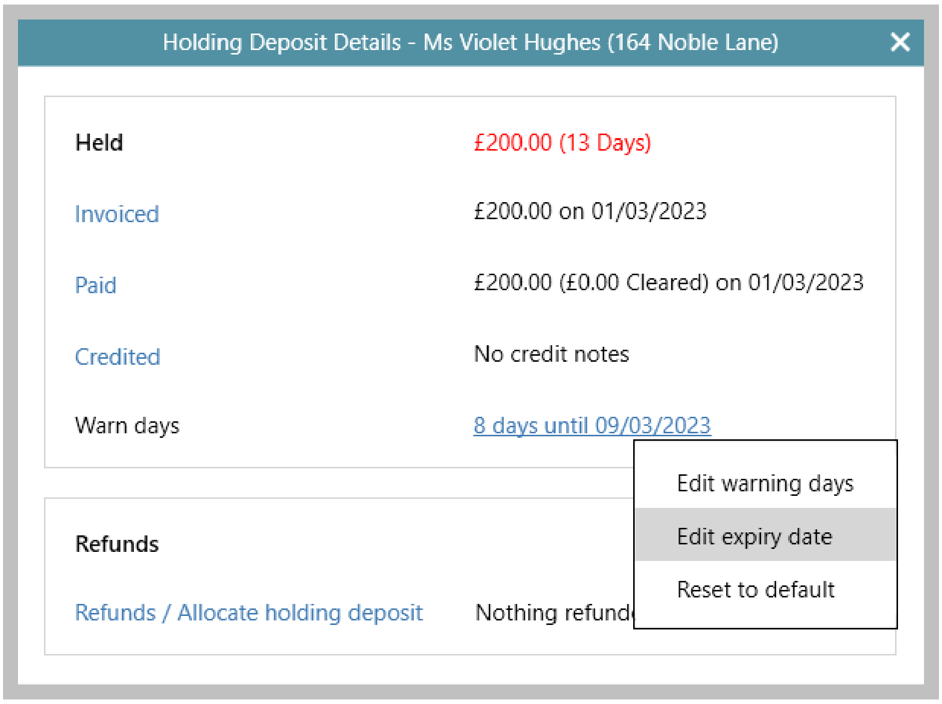
1. View & update holding deposit expiry date

From tenancy:

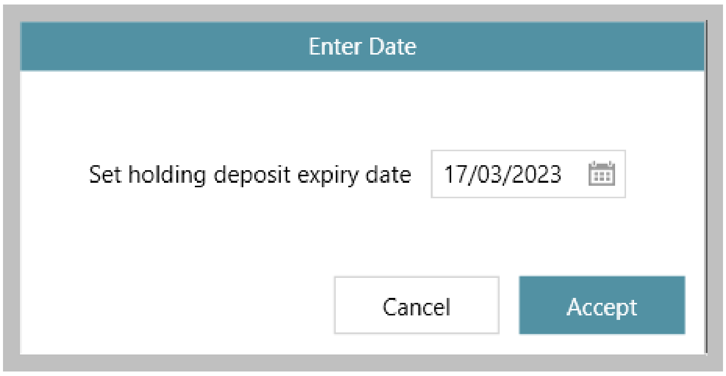
- To the right of **Holding deposit**, click link beside **Held**



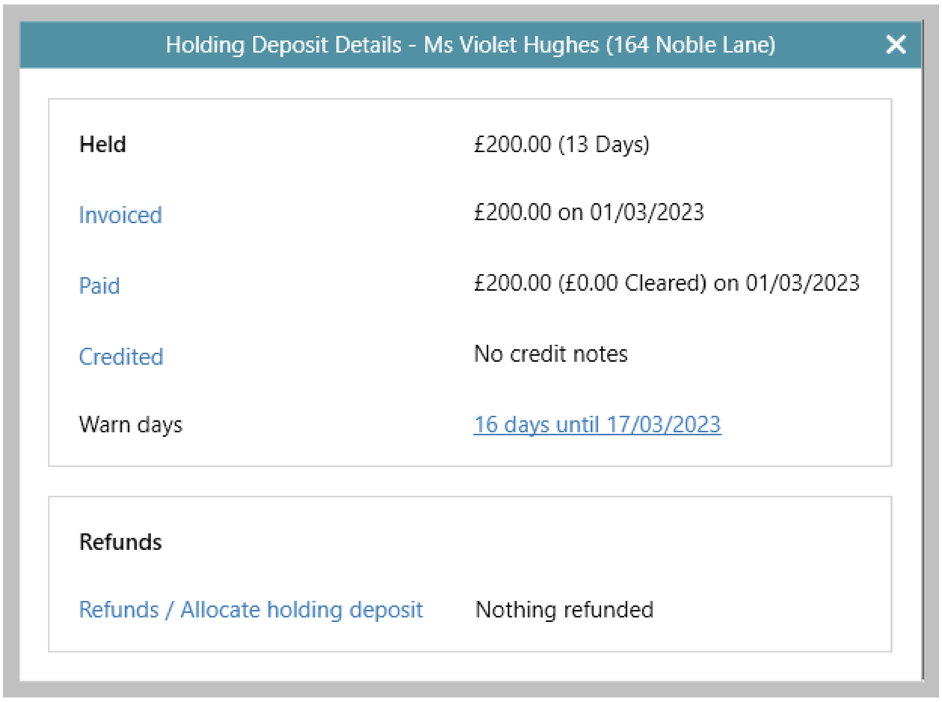
- Click link beside **Warn days** for option to **Edit expiry date**
  Warn days *displays the current expiry date for the holding deposit along with the number of days set (previously only the number of warning days was shown)*



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



- The date and number of days is updated

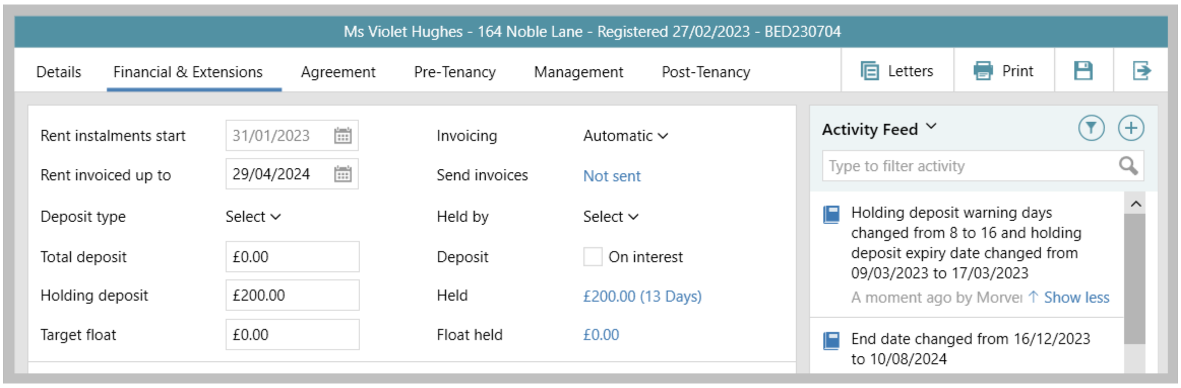


Changing the number of warning days via the **Edit warning days** option (shown above) will update the expiry date accordingly

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

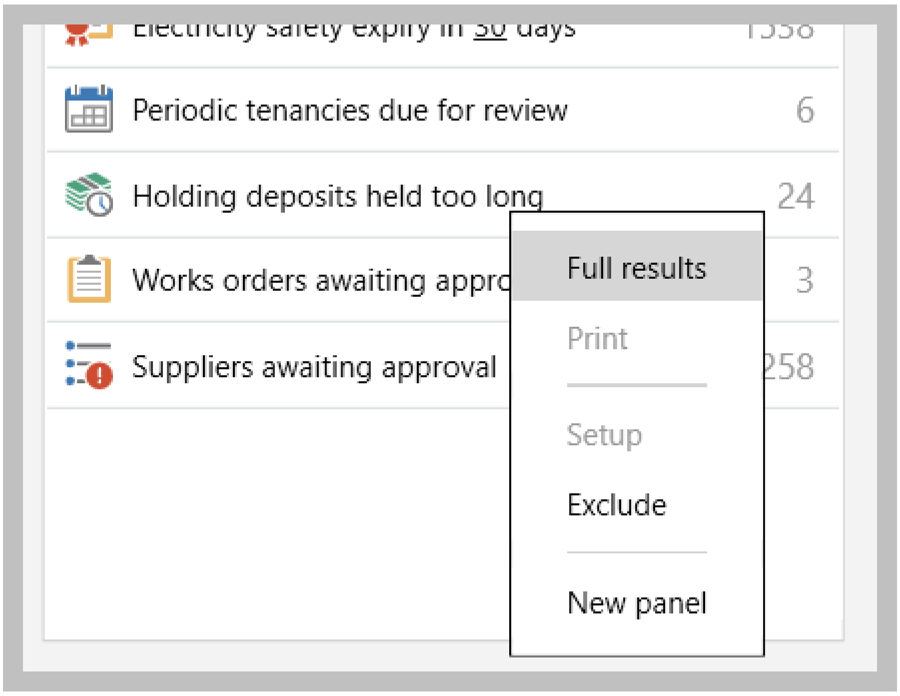


3. View holding deposit expiry date via Property Management grid

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

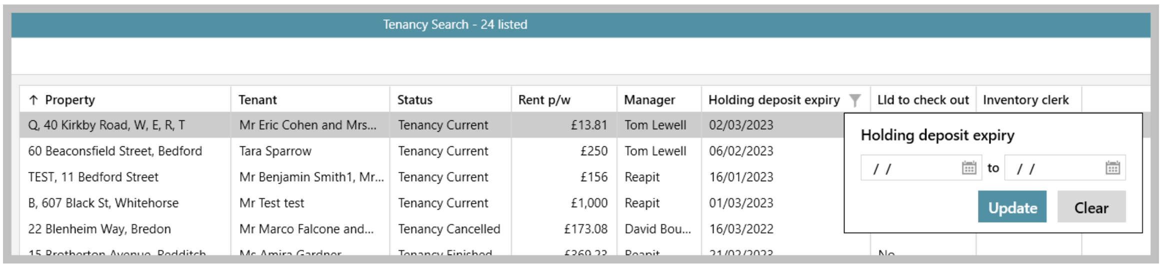
From Organiser, Property Management panel:

- 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

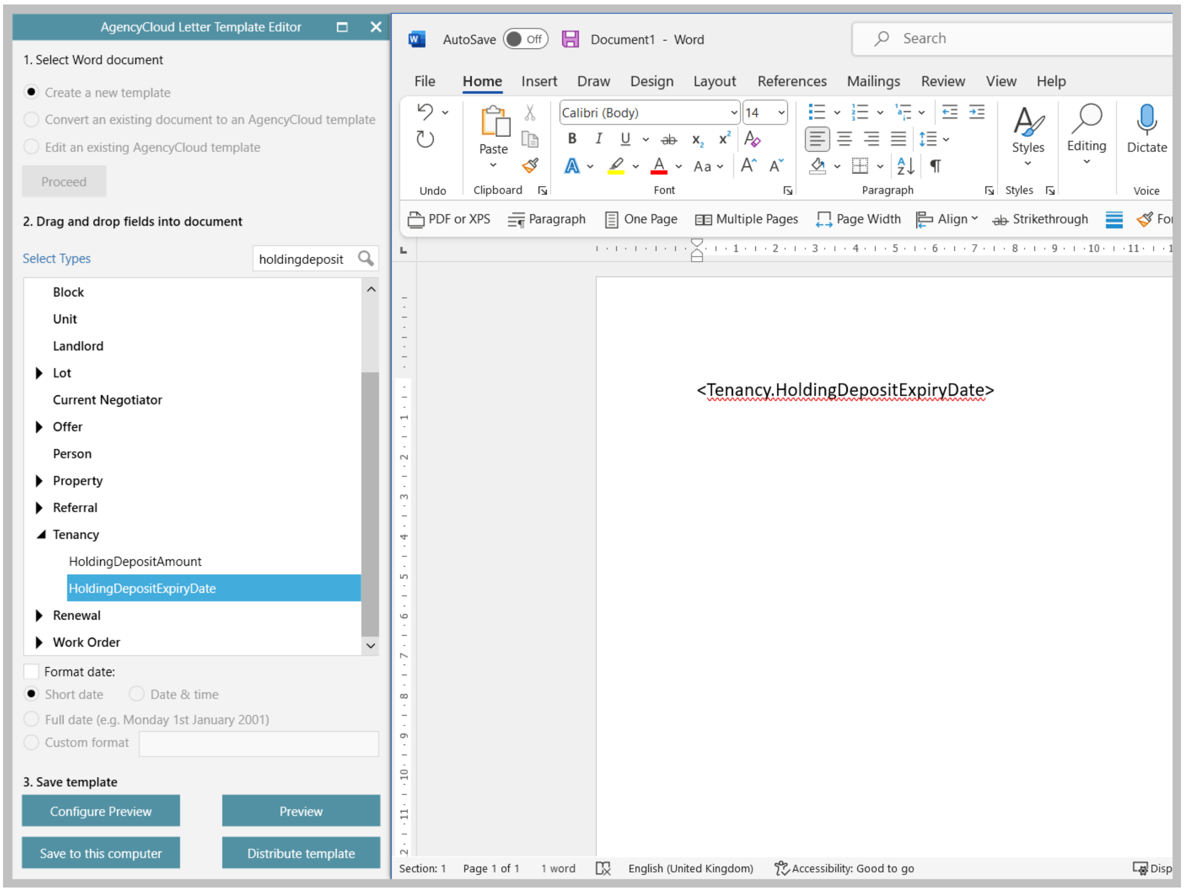


4. Holding deposit expiry date merge code in Letter Template Editor

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**

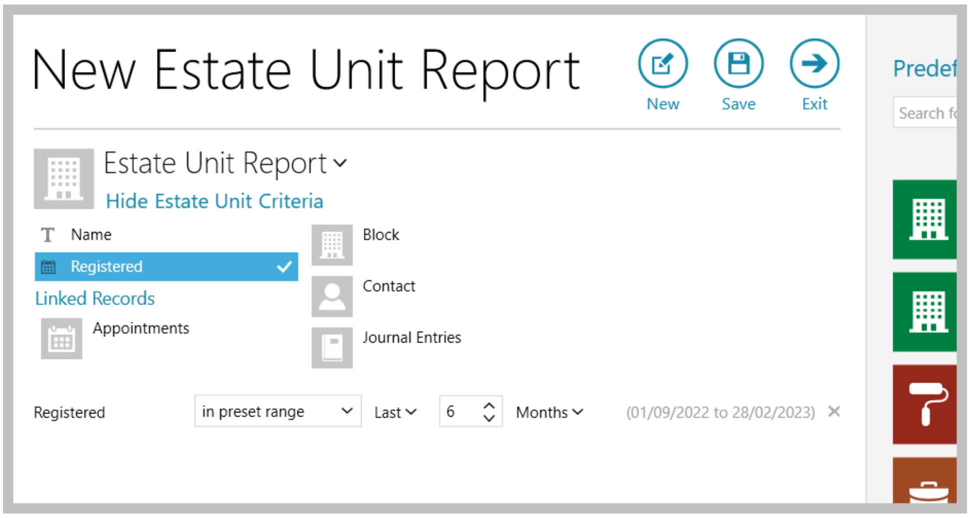
Block Management Power Report update to unit reports

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

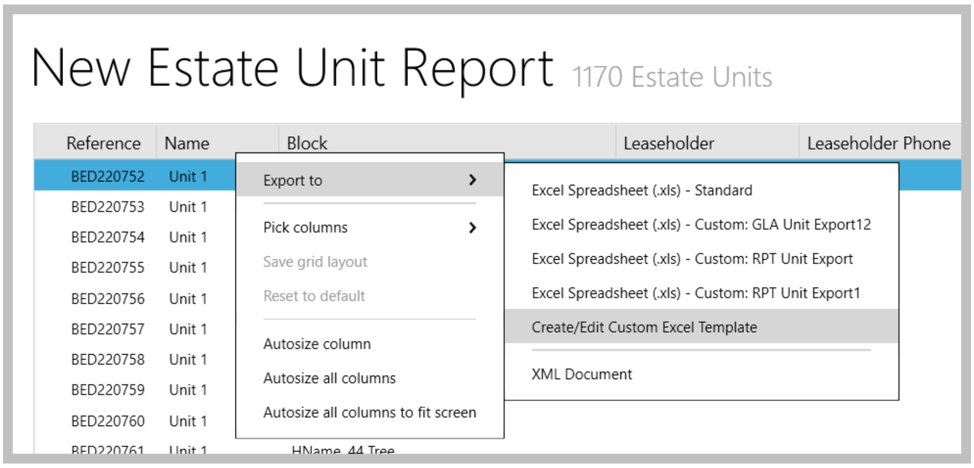
From Power Reports:

- 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***