Reapit AgencyCloud 12.163 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

System performance updates

On-going performance related enhancements have been applied in AgencyCloud 12.163 - for this release the performance of auto-matching for the Receipts From Statement function has been improved plus memory usage improvements have also been made

All enhancements are to ensure improved system performance, especially with larger sized systems that house/process very large quantities of data

New UI round-up: v12.163

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

Setup mailings/events

The setup mailings/events screen now uses the new UI format

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

The setup mailings/events 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 the Knowledge Base guide titled: **Mailings & events - how to add & edit**

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

For more information on using mailings & events, see the Knowledge Base guide titled: **Storing contact categories, mailings & employment information and subscribing a contact to a list**

Sales & lettings/rentals

Assign & manage internet registrations (portal leads)

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

Internet registrations (or portal leads) can be assigned to individual users, providing a more efficient method to assign leads, as well as giving users a better view of which leads they need to follow-up on

Two related configuration options are available to allow leads to be managed, meaning that a user can be prevented from being able to:

- assign leads to selected users
- see leads which have not been assigned to them

For example, branch managers could be given the ability to assign leads to their teams, then team members can be set to only see leads that have been assigned to them

To enable these configuration options, contact Reapit Support

When a portal lead enquiry is sent from a website, such as Rightmove, it is held in the Internet Registrations screen in AgencyCloud - this screen allows you to view enquiry details then either add them as an applicant/property, mark them as a duplicate or reject them

For more information on internet registrations functionality, see Knowledge Base

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1. Access internet registrations

From Organiser:

- Right-click over **Internet Registrations** (often shown in **Overview** panel)

- Select **Full results**
  The Internet Registrations screen will be displayed

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2. Assign leads to an AgencyCloud user (where enabled)

When a user has the ability to assign leads to other users, they can be assigned individually or in bulk

On the left side of the screen:

- Tick the lead(s) to assign
  Or tick the box in the header row to select all leads listed

- Click **Assign selected leads** (top left)

- Select the user to assign the lead(s) to and click **Select**

- Click **Yes**

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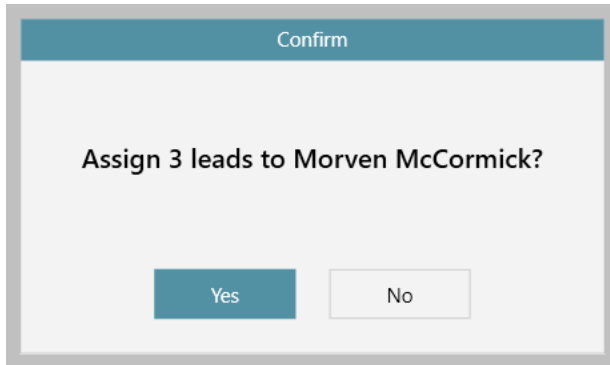
3. Lead assigned & noted in Activity Feed

When a lead has been assigned:

- The **Assigned to** column displays the name of the user that the lead has been assigned to
  Click column header to sort by user

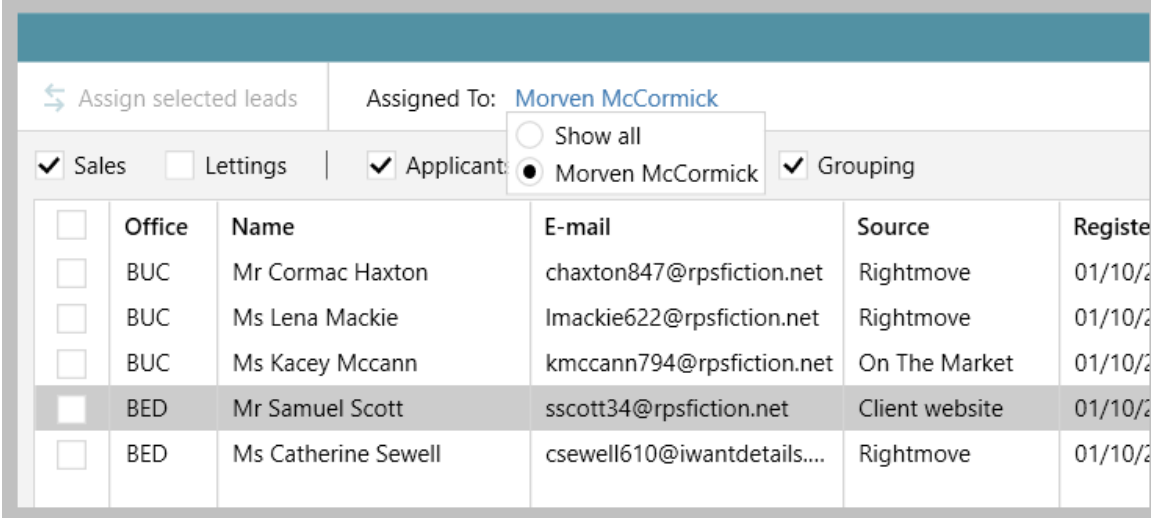- A note is added to the **Activity Feed**, seen when the lead is selected

4. Filter option (where enabled)

When a user is allowed to view leads assigned to others, the screen can be filtered to be able to view all leads or just their own leads

From top left of screen:

• Click link beside **Assigned to** - the name of the user is displayed

• Click name to just show leads that have been assigned to the current user

• Click **Show all** to see all leads

Sales invoice report available in Sage compatible format (UK only)

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

When running a sales invoice report, the option to export it in Sage compatible format is available

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1. Export report to Sage compatible format

Run the sales invoice report, as outlined in the Knowledge Base guide titled: **Sales invoice reporting (UK only)**
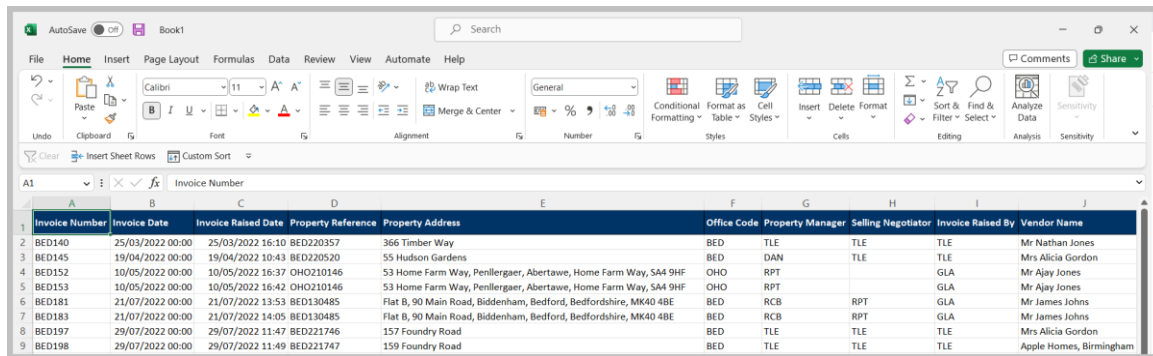
From the report results grid:

- Click **Report** (top left)

- Select **Sage Export Format** and click **Accept**

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2. Report exported to Excel

The Sage compatible report is exported to Excel and is automatically shown on screen

Column headings included in the report are:
Invoice Number, Invoice Date, Invoice Raised Date, Property Reference, Property Address, Office Code, Property Manager, Selling Negotiator, Invoice Raised By, Vendor Name, Transaction Type, Invoice Description, Charge Create Date, Charge Created By, Charge Description, Account, VAT Code, VAT Description, Net Amount, VAT Amount, Gross Amount, Property Type

For more information on sales invoicing, see Knowledge Base page titled: **Invoicing (sales - UK)**

Works order authorisation - 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 requires works orders to be authorised before they can be progressed

When this configuration option is enabled and a works order is created:

- Until the works order is authorised - its status cannot be progressed and print options are not available

- When a works order has been authorised - costs are displayed but cannot be edited (unless edit permission is given via configuration, see *Configuration options* section below)

- Each step of the authorisation process is logged in the works order Activity Feed

- A list of works orders requiring approval can be accessed via the Organiser Property Management panel

- Works order grids, seen via the Organiser Property Management panel or when running a works order report, can be setup to display works order authorisation status information

- Works order reporting allow reports to be carried out by works order authorisation status

- When booking works orders in bulk:
    - works orders that can be authorised will be authorised in bulk
    - works orders requiring authorisation will be flagged and added to the list of works orders requiring approval (accessed via the Organiser Property Management panel)

Configuration options

Configuration options are available to apply restrictions/permissions for individual users for works order authorisation, as follows:

- A user can be prevented from authorising works orders - i.e. only specific users could be given permission to authorise

When a user has permission to authorise works orders:

- differing maximum cost authorisation limits are set per user - an infinite limit can also be applied

- authorisation can be limited to works orders for just one office, several offices or all offices

- permission to authorise under-funded works orders can be given/prevented
  A works order is classed as under-funded when there isn't a sufficient float held to cover the works order total value

- the cost on an approved works order can be edited by authorised users

All of the above configuration options need to be enabled, contact Reapit Support to request this

1. Create works order

Create works order as usual, including the Net Cost (as this has a bearing on whether a user is able to approve the works order):

- While the works order is being worked on, the **Approval Status** is **Not Set**
  *This prevents the works order from being added to the list of **Works orders awaiting approval** on the Organiser Property Management panel (all existing works orders created before works order authorisation functionality was implemented on your system are also given the status of Not Set)*

As shown in steps 2 & 3 below, the **Approval Status** link provides the ability to mark the works order as:

- **Awaiting Authorisation** - this is the only option offered to a user when they are not permitted to approve the works order - see step 2

- **Authorised** - this option is offered when a user is able to authorise the works order, see step 3

2. When not authorised to approve works order - mark works order as awaiting authorisation

Click link beside Approval Status:

- Select **Awaiting Authorisation**

- This puts the works order into the **Works orders awaiting approval** list on the Organiser Property Management panel - see step **4**

- The change to the Approval Status is logged in the works order **Activity Feed**

- While the works order is Awaiting Authorisation:

    - the **Print** button (top right of the works order) is disabled

    - the **Status** menu does not offer the options to mark the works order as **Raised** or **Completed**

3. Mark works order as authorised (where permitted)

Click link beside Approval Status:

- The option to mark as **Awaiting Authorisation** is offered (as outlined in step 2), along with the option to mark as **Authorised**

When selecting **Authorised**, the **Net Cost** and **VAT/GST** fields are immediately locked for editing

- When ready to authorise, select **Authorised** (shown in menu above)

- Cost fields are locked for editing
  Selected users can be set-up to be able to edit the cost on an approved works orders - see 3a
- Works order **Status** can now be changed to **Raised** or **Completed**
- **Print** button (top right) can be used to print and/or email works order detail

The change to the Approval Status is logged in the works order **Activity Feed**, as shown in step 2

3a. Edit the cost on an approved works order (where enabled)

Where enabled, a user can edit the cost on an approved works order

From the approved works order:

- Click **Edit** (to right of the **VAT/GST** field, as shown in the example in step 3)

- A prompt will be displayed - click **Yes**

- The works order **Approval Status** will be set to **Awaiting Authorisation** again and the **Net Cost** can be changed

The works order needs to be authorised again (by a user with the relevant permissions)

4. Access list of works orders awaiting approval on Organiser

Works orders that are marked as Awaiting Authorisation are displayed in the Property Management panel

The option needs to be added to the panel first:

- Hover over the Property Management panel header

- Click the settings (cog) icon to access Panel Setup
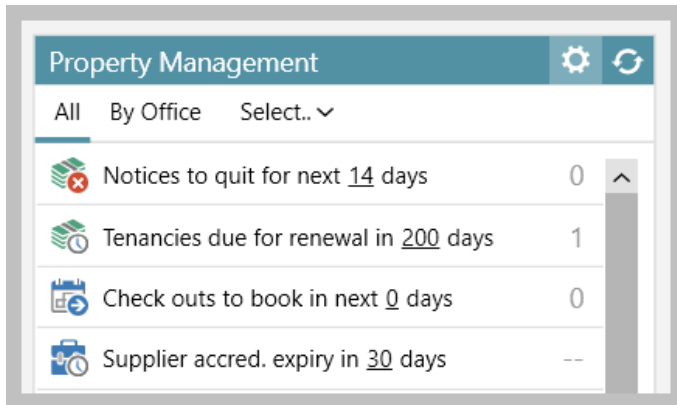
- Scroll to the bottom of Panel Setup, tick **Works orders awaiting approval** and click tick (top right) to save
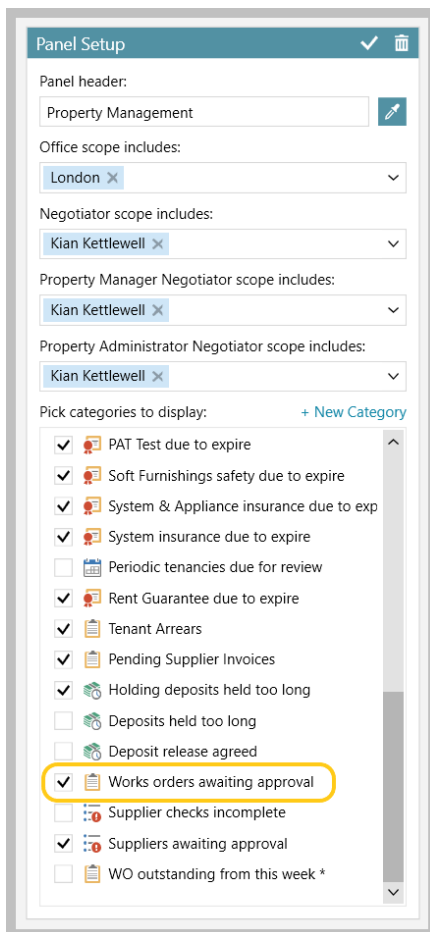
From Property Management panel:

- **Works orders awaiting approval** is displayed in the list
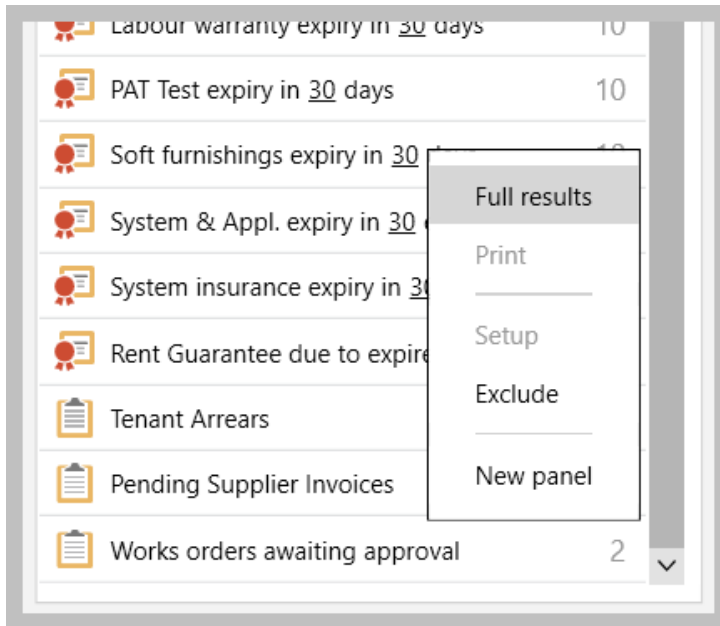
- Click **Works orders awaiting approval** to see the list within the panel
  OR, right-click and select **Full results** to view the works orders grid
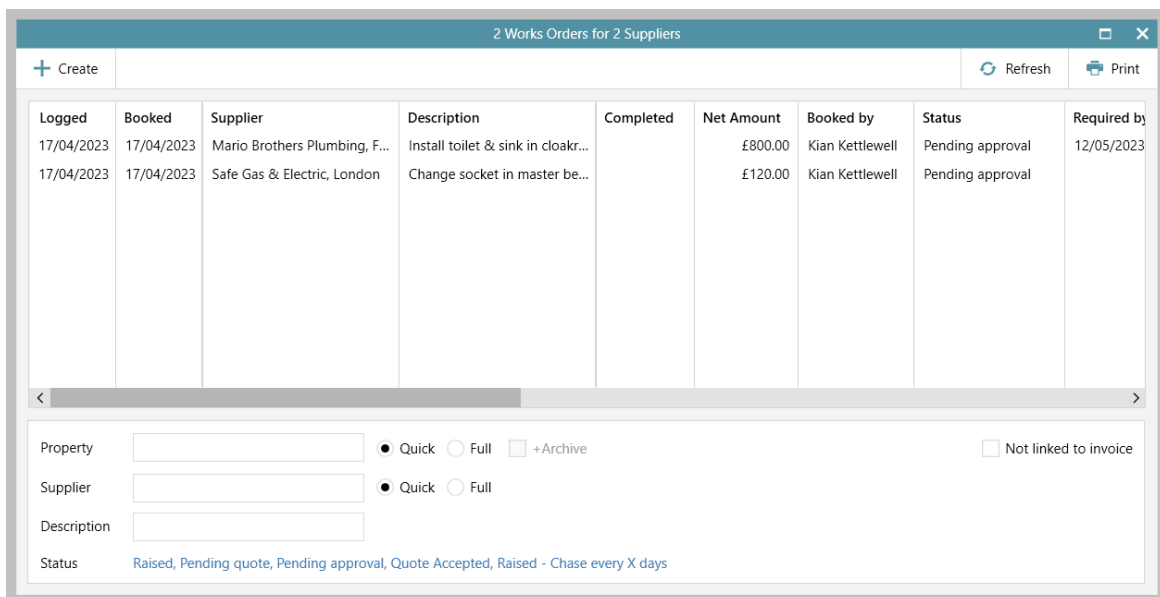
Three columns relating to works order authorisation can be added to the works order grid:

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

- In **Choose Columns**, tick **Authorisation Status**, **Authorised By** and **Authorised Date** - click **Accept**

- Right-click over the grid headings again and select **Save grid layout**

5. Reporting on works orders by authorisation status

From Power Reports:

- Change report type to **Works Orders**

- Click **Authorisation Status**

- Select which **Authorisation Status** to include (or not include) in the report
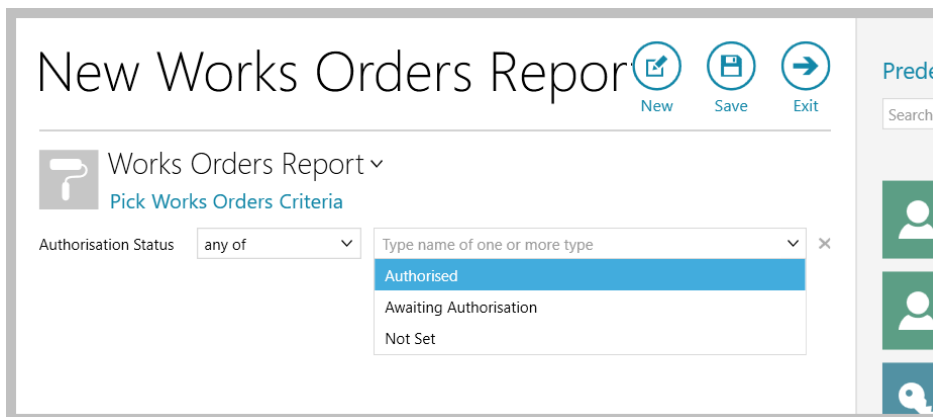
- Add any other required criteria and click **Run Report**
  The report results will be displayed in a grid

Three columns relating to works order authorisation can be added to the report results grid:

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

- In **Choose Columns**, tick **Authorisation Status**, **Authorised By** and **Authorised Date** - click **Accept**
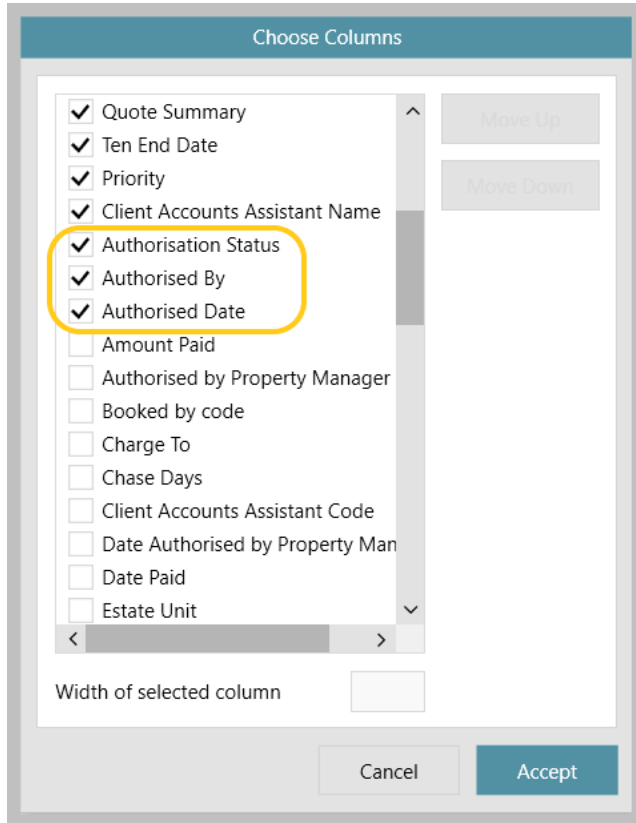
- Right-click over the grid headings again and select **Save grid layout**

6. Booking works orders in bulk

When booking works orders in bulk:

- works orders that can be authorised will be authorised in bulk
- works orders requiring authorisation will be added to the Organiser list (outlined in in step 4)

Create the works orders in bulk, as usual:

- Enter the Works Order Details and clicking **Next**

- A prompt will be displayed to confirm that the works orders will be created

    On clicking **Yes**, if the user's configuration settings/authorisation limits dictate that:

    - **the works order(s) can be approved**
        - This information is given in an on-screen prompt, as shown in the example below
        - The relevant works order(s) will be created and marked as **Authorised**

    - **the works order(s) cannot be approved**
        - This information is given in an on-screen prompt
        - The new works order(s) will be created and marked as **Awaiting Authorisation**
        - The new works order(s) will also be added to the list of works orders requiring approval on the Organiser Property Management panel, **Works orders awaiting approval** (see step 4)
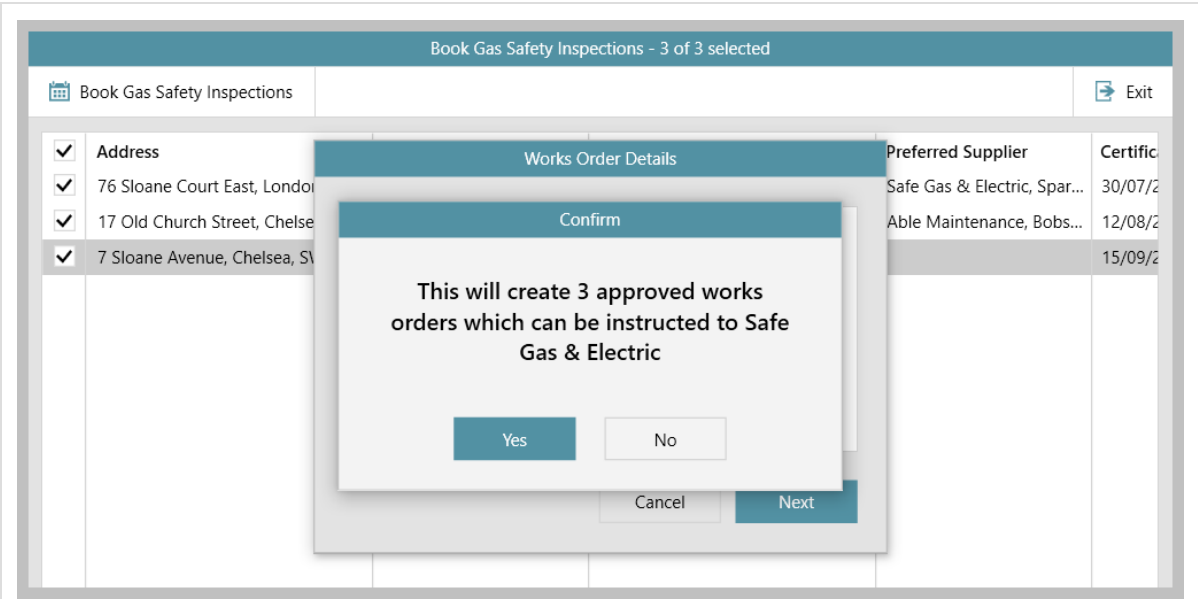
In the example above - as indicated in the prompt, all selected works orders are approved

On clicking *Yes*, the works orders will be created and marked as *Authorised*

Accounts*

Outstanding invoices no longer transferred to new landlord

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

From AgencyCloud 12.163+, when there is a change of landlord on a lettings property, any outstanding rent invoices from the period of the tenancy with the original landlord will stay linked to that landlord rather than be moved to the new landlord
(prior to AgencyCloud 12.163, the invoices became linked to the new landlord)

If the new landlord takes on the original landlord's arrears/invoices, the invoice should be credited and re-raised against the new landlord

Block Management**

Unit reporting 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 grids when reporting on units for Block Management

These options include:

1. Default and/or custom grid columns can be set for 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

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1. Default/custom grid columns in report result grids

After running an estate unit report:

- 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

2. Dynamic background colour options in report result grids

After running an estate unit report:

- Items in grids that match specific criteria can be shaded to highlight the record(s)

- In this example, records with **RPT23** at the start of their **Reference** are shaded

RPT220008	Unit 1	Peak Apartments			19/12/2022 03:29 PM
RPT220009	Unit 2	Peak Apartments			19/12/2022 03:29 PM
RPT220010	Unit 3	Peak Apartments			19/12/2022 03:29 PM
RPT230001	Unit 1c	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE			05/01/2023 10:07 AM
RPT230002	Unit 2	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE			05/01/2023 10:07 AM
RPT230003	Unit 3	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE			05/01/2023 10:07 AM
RPT230004	Unit 4	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE	Mrs M Teix	m: 0795100018604; h: 020(	05/01/2023 10:07 AM
RPT230005	Unit 5	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE			05/01/2023 10:07 AM
RPT230006	Unit 6	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE			05/01/2023 10:07 AM
RPT230007	Unit 7	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE			05/01/2023 10:07 AM
RPT230008	Unit 8	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE			05/01/2023 10:07 AM
RPT230009	Unit 9	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE			05/01/2023 10:07 AM
RPT230010	Unit 10	Sparrow House, 124 Manor Road, Thames Ditton, Surrey, KT7 4EE			05/01/2023 10:07 AM

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

The above enhancements are also available for Block Management Estate reporting, as outlined in the Knowledge Base guide titled: **Block Management grid option enhancements - configuration options**