

Reapit AgencyCloud 12.164

release notes

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

To access the release notes via the Knowledge Base, [click here](#)

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

Configuration options are available to Enterprise customers only

** Only applies to users of Block Management*

General

New UI round-up: v12.164

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

Setup contact categories

The setup contact categories screen now uses the new UI format

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

The setup contact categories 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: **Contact categories - 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 guide titled: **Self service configuration options for AgencyCloud**

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

ID check updates (12.164)

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

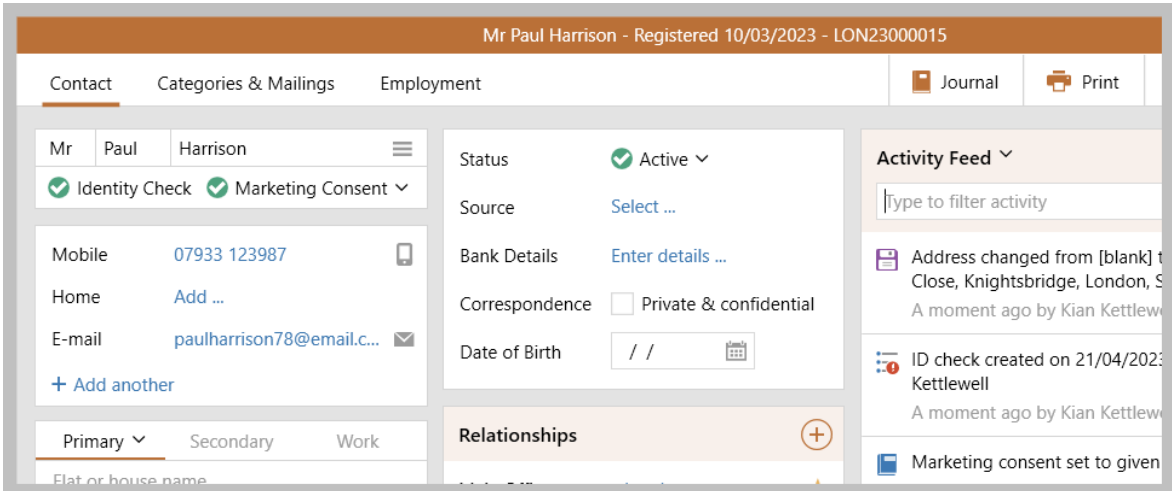
Several updates have been made to ID Checks in AgencyCloud 12.164, as outlined in the following sections:

1. New ID Check section in contact journal
2. Mandatory cancellation reason
3. Detail in journal/activity feed when new ID added & existing ID cancelled

1. New ID Check section in contact journal

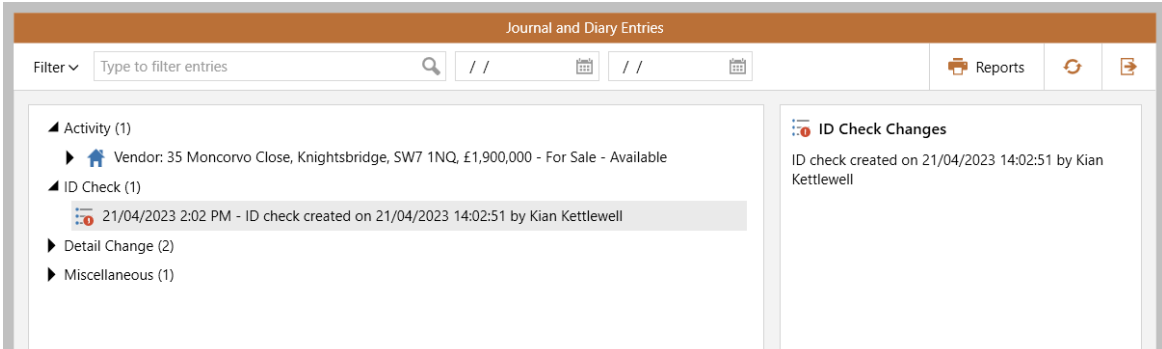
From contact record:

- Click **Journal** (top right)



The screenshot shows the contact record for Mr Paul Harrison (Registered 10/03/2023 - LON23000015). The 'Journal' tab is selected in the top right. The contact details include: Name (Mr Paul Harrison), Status (Active), Source (Select...), Bank Details (Enter details...), Correspondence (Private & confidential), Date of Birth (// //), and an Activity Feed on the right. The Activity Feed shows: 'Address changed from [blank] to 35 Moncorvo Close, Knightsbridge, London, SW7 1NQ. A moment ago by Kian Kettlewell', 'ID check created on 21/04/2023 2:02 PM by Kian Kettlewell. A moment ago by Kian Kettlewell', and 'Marketing consent set to given'.

- A new **ID Check** section has been added to store ID Check related activity
Previously ID Check activity was added to the Miscellaneous section



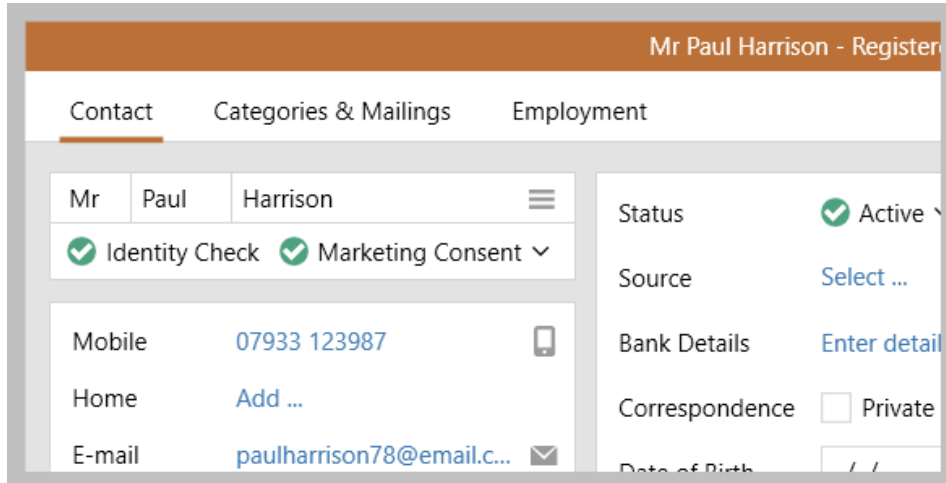
The screenshot shows the 'Journal and Diary Entries' section. The filter is set to 'Type to filter entries'. The entries are categorized into: Activity (1), ID Check (1), Detail Change (2), and Miscellaneous (1). The ID Check entry is highlighted: '21/04/2023 2:02 PM - ID check created on 21/04/2023 14:02:51 by Kian Kettlewell'. A separate section titled 'ID Check Changes' shows: 'ID check created on 21/04/2023 14:02:51 by Kian Kettlewell'.

2. Mandatory cancellation reason

When cancelling ID, entering a cancellation reason is now mandatory

From any record where ID Check information can be stored (e.g. contact, applicant, tenant, etc):

- Click **Identity Check** (top left)



Mr Paul Harrison - Register

Contact Categories & Mailings Employment

Mr Paul Harrison

Identity Check Marketing Consent

Mobile 07933 123987

Home Add ...

E-mail paulharrison78@email.c...

Status Active

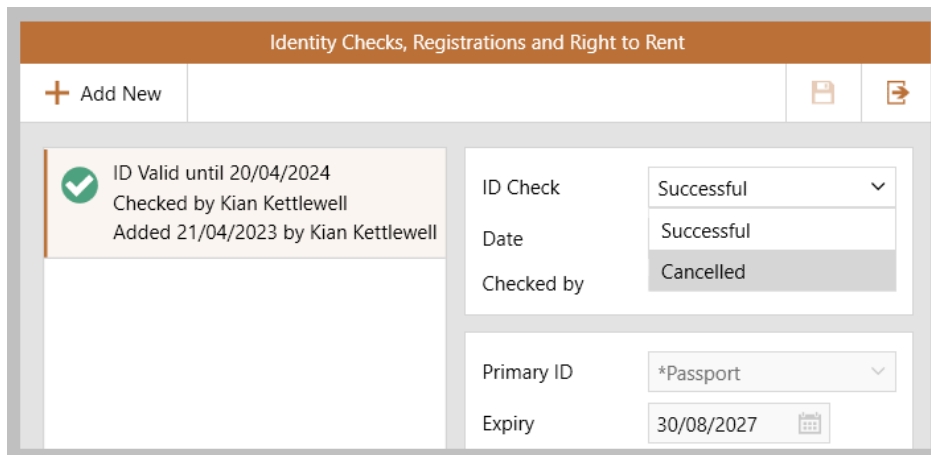
Source Select ...

Bank Details Enter detail

Correspondence Private

Date of Birth / /

- Change status to **Cancelled**



Identity Checks, Registrations and Right to Rent

+ Add New

ID Valid until 20/04/2024
Checked by Kian Kettlewell
Added 21/04/2023 by Kian Kettlewell

ID Check Successful

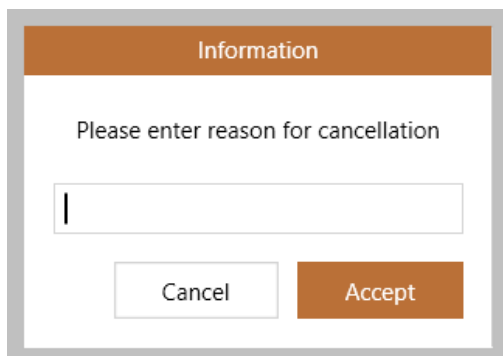
Date Successful

Checked by Cancelled

Primary ID *Passport

Expiry 30/08/2027

- The ID cannot be marked as cancelled until text is entered into the cancellation reason field

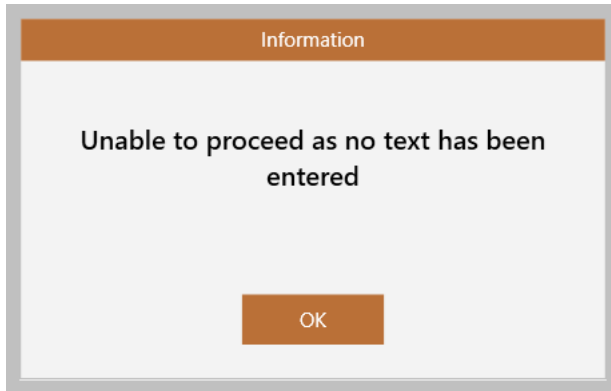


Information

Please enter reason for cancellation

Cancel Accept

- Clicking **Cancel** will revert the ID to its previous status
- Clicking **Accept** without adding text will display the following prompt

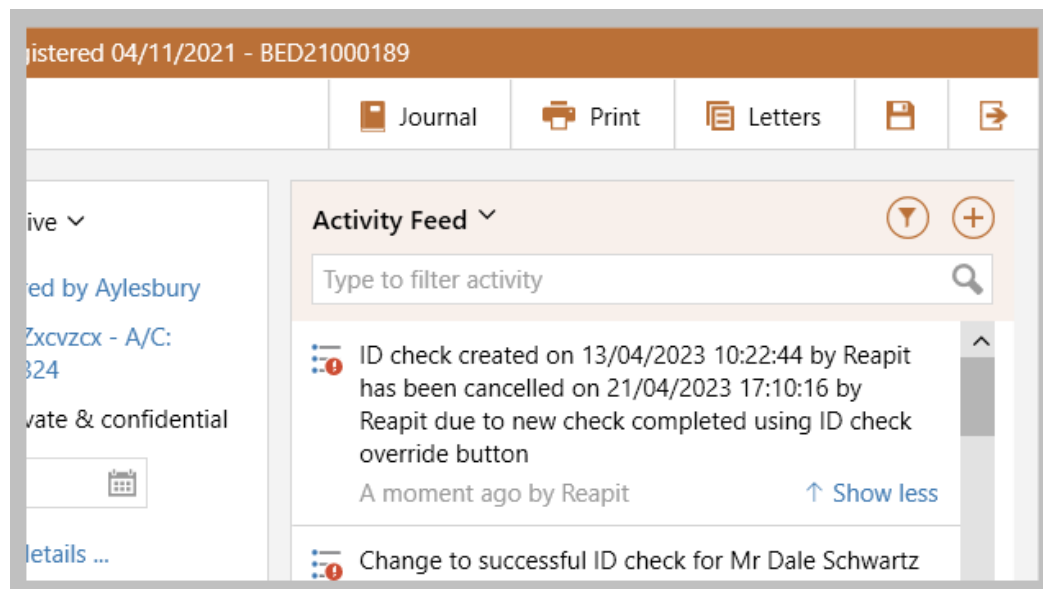


3. Detail in journal/activity feed when new ID added & existing ID cancelled

When a new check is added which cancels a previous check, how the new check has been added is detailed in the contact journal and activity feed

When a check is created by:

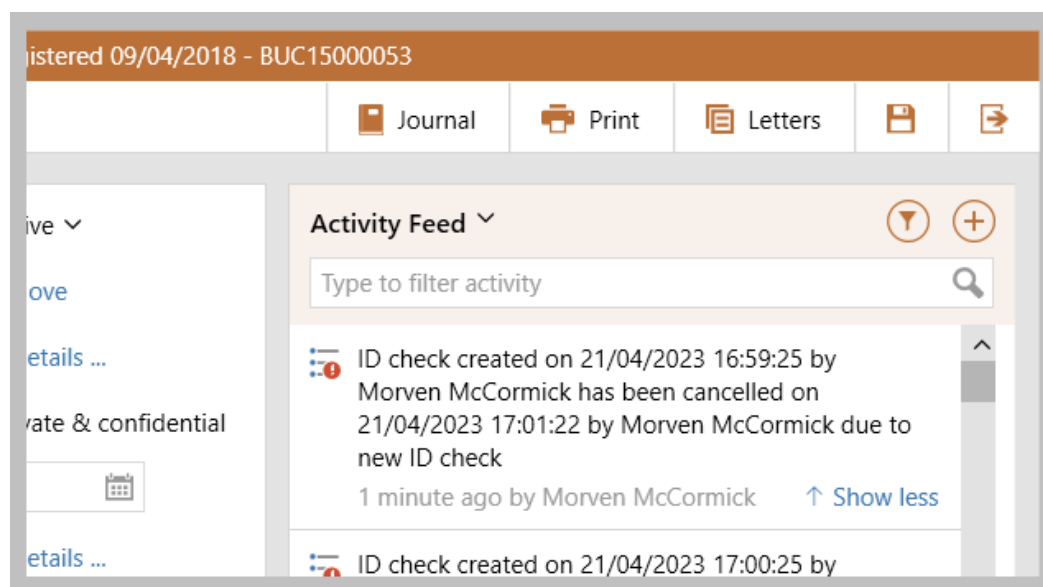
1. **A manual override** - contact journal/activity feed states that the ID has been cancelled due to ...new check completed using ID check override button



2. **Submitting to LexisNexis** - contact journal/activity feed states that the ID has been cancelled due to ...new check submitted to LexisNexis

3. **Manually marking the check as Passed** - contact journal/activity feed states that the ID has been cancelled due to ...new check completed by manually setting to passed

When none of the above apply, the contact journal/activity feed states that the ID has been cancelled ...due to new ID check



Sales & lettings/rentals

Report on properties with QR codes uploaded

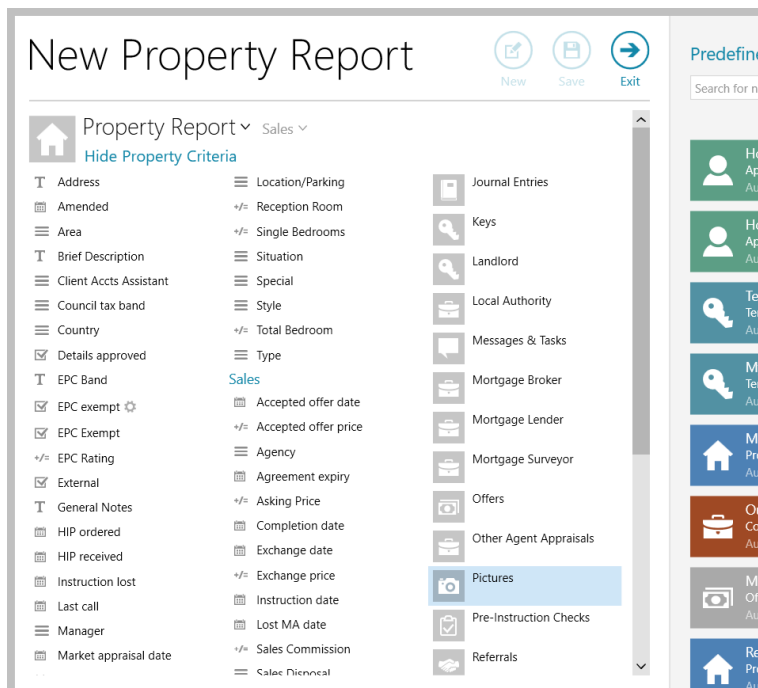
This guide has been reviewed against our global client base and classed as relevant to all regions

From AgencyCloud 12.164+, properties that do/don't have a QR code stored can be reported on

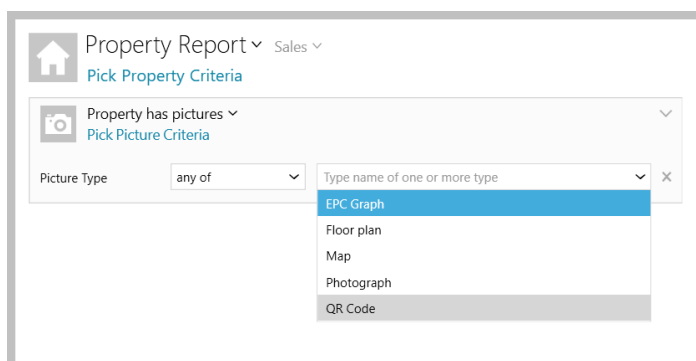
The ability to store QR code images on property records was introduced in AgencyCloud 12.162 (see 12.162 Release Notes for more information)

From Power Reports:

- Select **Property Report** type and select **Sales** or **Lettings**
Select any required criteria, such as Office, Status, etc.
- From **Linked Records** section, select **Pictures** (may need to click **Show more**)






- Click **Picture Type** and select **QR Code**
*Click **Property has pictures** to change the report to **Property does not have pictures** - this will return properties that do not have a QR code stored on the property*



This example report will return all properties that are For Sale - Available in the user's office that have a QR code stored

New Property Report


  

New Save Exit

Property Report









Office

Sales Status

 Property has pictures

Picture Type

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Set certificate status & status-related certificate checks - configuration option

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

Certificate status

A configuration option is available to allow a status to be set on a safety certificate - this can be useful where a safety certificate has been given but, due to it not meeting various conditions, it cannot be deemed as completely satisfactory until various conditions have been met

This functionality allows:

- Specific status options to be set on a specific certificate types
For example, gas & electrical safety certificates may be the only types where status options are needed
- Different status options to be set per certificate type
- Status options to be customised to meet business requirements
- Certificates to reported on by status

Status-related checks

Once certificate status options have been set-up (as outlined above), further configuration options are available which allow specific certificate checks (within the certificate checklist) to be added in relation to the status set on the certificate

*For example, when an electrical safety certificate status is set to **Unsatisfactory C2**, this could add 3 further checks to the checklist*

To enable these configuration options, contact Reapit Support

1. Add status to certificate

To add a certificate status:

- Add certificate details as usual
- Click **Status** and select relevant status of certificate

The screenshot shows the 'Edit Certificate' form with the following fields and values:

- Category:** Radio buttons for Safety Certificate (selected), Insurance Policy, and Warranty.
- Type:** Electrical Safety (dropdown menu).
- Booked:** 10/04/2023 (calendar icon).
- Expiry Date:** 09/04/2024 (calendar icon) and a checkbox for No Expiry Date.
- Status:** Satisfactory (dropdown menu).
- Provider:** Satisfactory (dropdown menu).
- Certificate Ref.:** Satisfactory C3 (text input).
- Checks:** Unsatisfactory C1 (text input).
- Appliances:** Unsatisfactory FI (text input) and a plus icon (+).
- Notes:** Type notes here (text area).

Options offered are dependent on business requirements and the certificate type chosen

2. Status dependent check list items

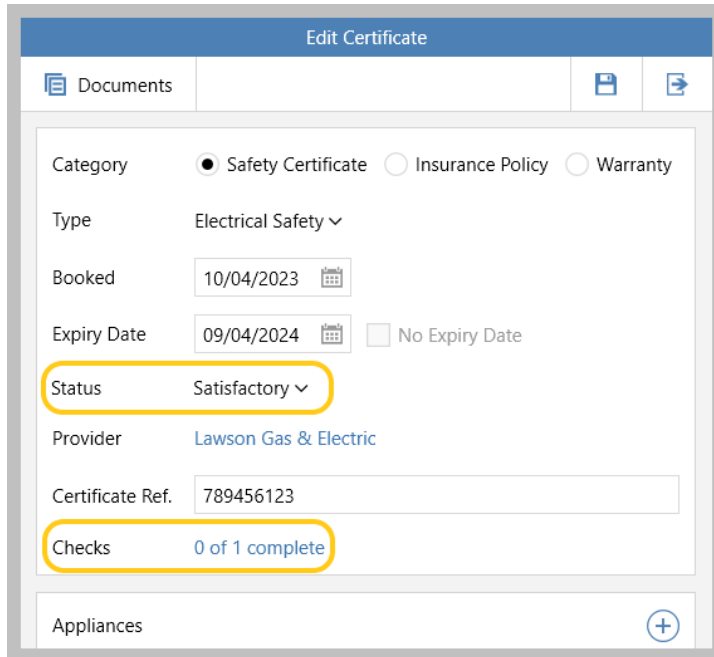
When the status has been selected

- **Checks** will be updated to reflect the status chosen (where configured)

Example

In this example setup, when the **Status** of an electrical safety certificate is set as:

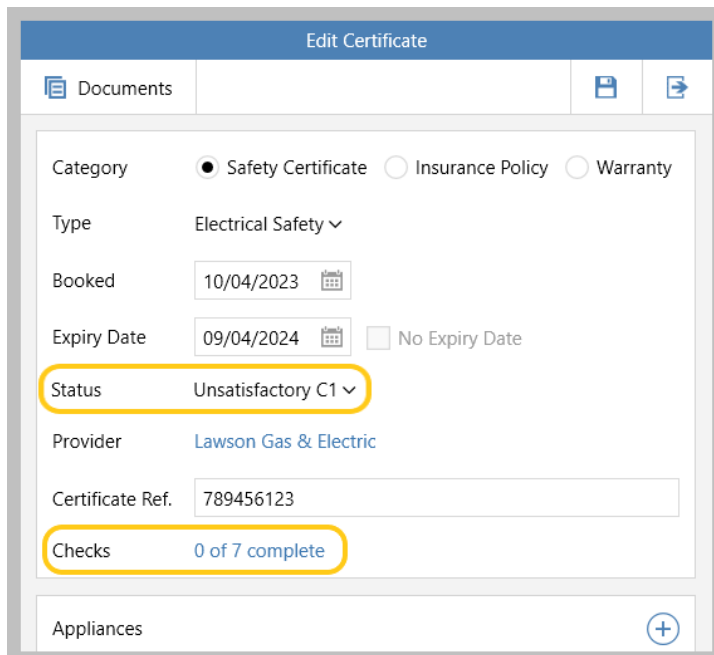
- **Satisfactory** - only one check is required



The screenshot shows the 'Edit Certificate' form with the following details:

- Category: Safety Certificate Insurance Policy Warranty
- Type: Electrical Safety
- Booked: 10/04/2023
- Expiry Date: 09/04/2024 No Expiry Date
- Status: Satisfactory
- Provider: Lawson Gas & Electric
- Certificate Ref.: 789456123
- Checks: 0 of 1 complete
- Appliances: +

- **Unsatisfactory C1** - seven checks are required



The screenshot shows the 'Edit Certificate' form with the following details:

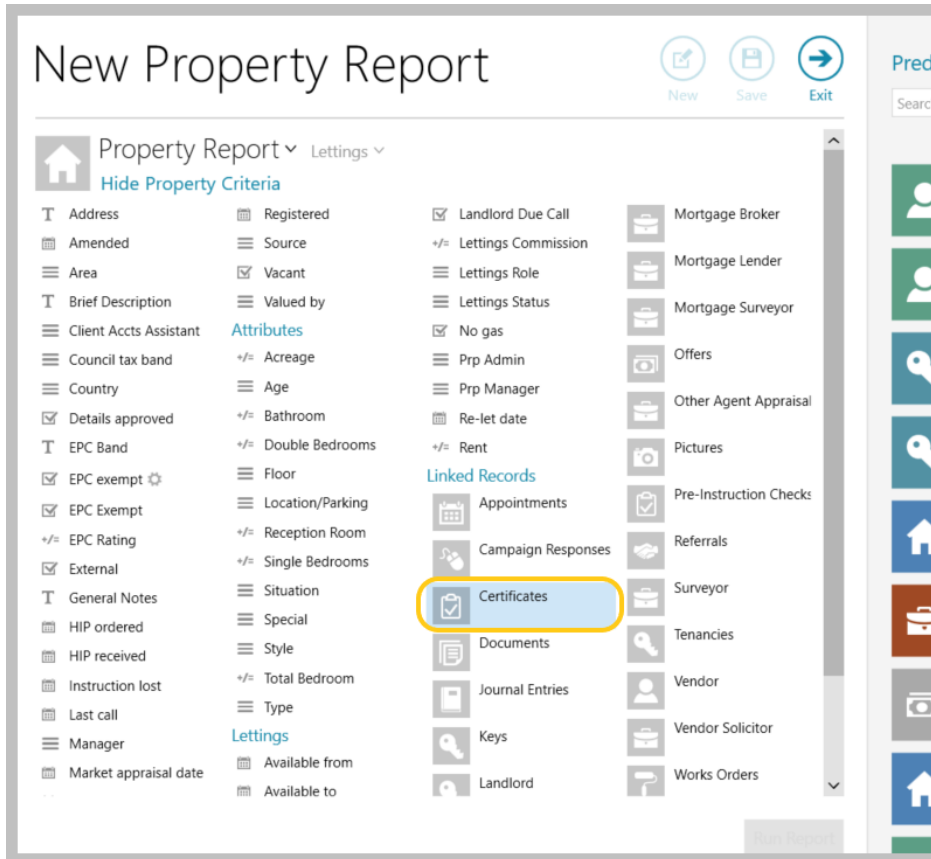
- Category: Safety Certificate Insurance Policy Warranty
- Type: Electrical Safety
- Booked: 10/04/2023
- Expiry Date: 09/04/2024 No Expiry Date
- Status: Unsatisfactory C1
- Provider: Lawson Gas & Electric
- Certificate Ref.: 789456123
- Checks: 0 of 7 complete
- Appliances: +

3. Report on certificate status

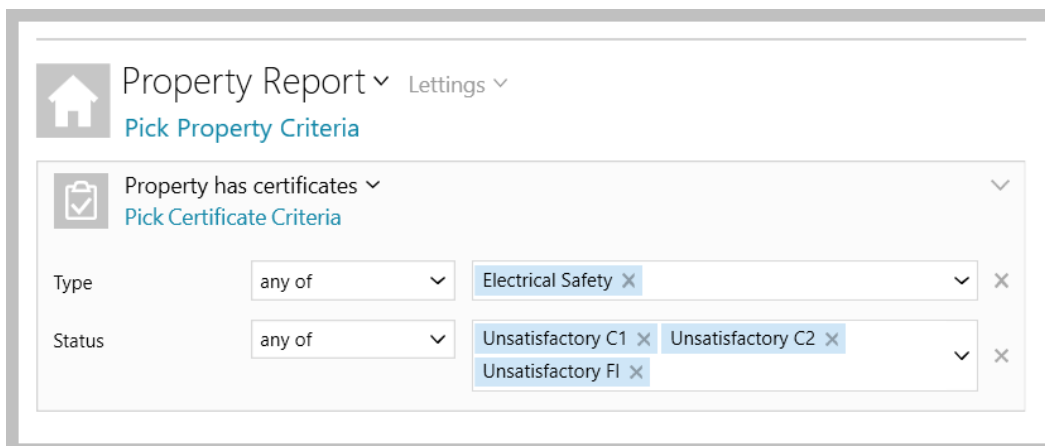
Certificates can be reported on by status

From Power Reports:


- Select **Property Report** type and select **Lettings**
Select any required criteria, such as Office, Status, etc.
- From **Linked Records** section, select **Certificates** (may need to click **Show more**)




- Click **Status** and select required status option(s) to report on (*plus select any other criteria to report on*)



- **Checks** could also be added as a sub-report
(Click **Pick Certificate Criteria** and select **Checks** from **Linked Records** section)

 Property Report ▾
Lettings ▾


[Pick Property Criteria](#)

 Property has certificates ▾
▾

[Pick Certificate Criteria](#)

Type ▾ any of Electrical Safety ▾ ×

Status ▾ any of Unsatisfactory C1 ▾ × Unsatisfactory C2 ▾ × Unsatisfactory FI ▾ ×

 Certificates has checks ▾
▾

[Pick Certificate Check Criteria](#)

Predefined check name ▾ any of 1 Quote for remedial works & sent to LL ▾ × | ▾ ×

Status ▾ any of Needed ▾ × Sent/Arranged ▾ ×

Add a commercial EPC - 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 EPC information for commercial properties to be added and an EPC graph image created - certificate details can also be stored and related documents uploaded

Creating an EPC graph image automatically adds the image to the property pictures gallery to allow it to be included on property details and uploaded to portals

Commercial EPCs can also be reported on and information on the commercial EPC seen in property report results grids and property grids accessed via the Organiser

To enable this configuration option, contact Reapit Support

For more information on entering commercial property details on AgencyCloud, see Knowledge Base guide titled: **Commercial properties**

See next page for more information...

1. Enter EPC rating

Once the EPC figure is available, an EPC graph image can be generated

From the **Attributes** panel:

- Click **EPC**

The screenshot shows a software interface for a property listing. The main panel is titled 'Unit 10, 50 Jarvis Way, Longton Street, SW19 9DG - Registered 26/04/2023'. It includes a 'Vendor' section for 'Grainger Holdings, London' and a 'Relationships' section. The 'Attributes' panel is open, displaying details such as '1443 Square Feet', 'Onsite Security, 24-hour Access, Vacant', and 'Office'. A yellow circle highlights the 'EPC' button in the bottom right corner of the 'Attributes' panel.

- Expand **Commercial EPC** section

The screenshot shows the 'EPC' section of the software interface. It includes a header with 'EPC' and three buttons: 'Make Graph', 'View Graph', and 'Add Certificate'. Below the header, there are several input fields and checkboxes for EPC details, including 'EPC Exempt', 'Energy Efficiency Rating', 'Environment Impact Rating', 'First Page URL', 'Full Document URL', and 'Document File'. A yellow circle highlights the 'Commercial EPC' option at the bottom of the section.

From Commercial EPC section:

- Enter **EPC Rating** and the **EPC Created date**

EPC

[Make Graph](#) [View Graph](#) [+ Add Certificate](#) [↗](#)

EPC Exempt

Energy Efficiency Rating - Potential - Created

Environment Impact Rating - Potential -

First Page URL

Full Document URL

Document File [Select ...](#)

▲ Commercial EPC

EPC Exempt

Commercial EPC EPC Exempt

EPC Rating

EPC Created date

URL to the EPC

Document File [Select ...](#)

▶ Show HIP ordering

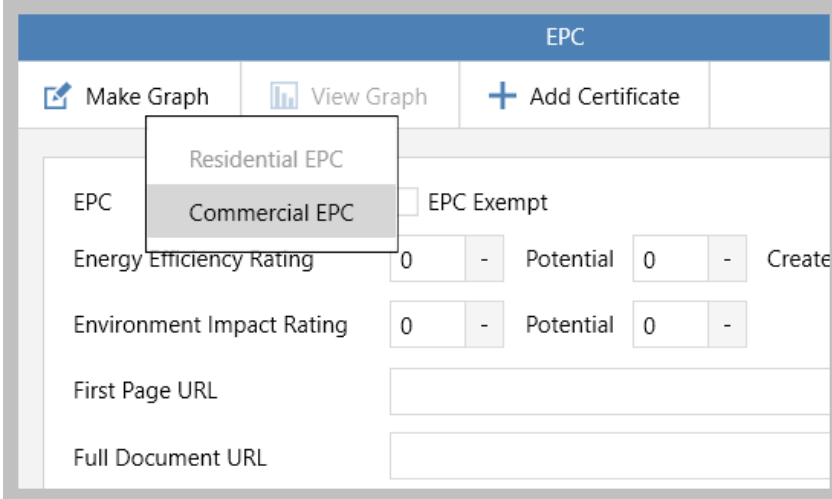
This section also allows the commercial property to be marked as **EPC Exempt**, plus the **URL to the EPC** to be entered and/or the EPC **Document File** to be uploaded

2. Make EPC graph

When the EPC has been created, the EPC graph image can be created

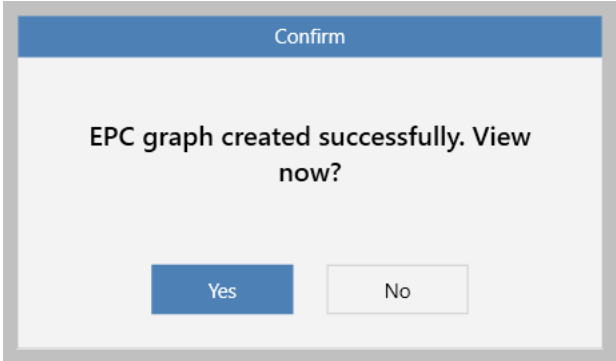
From top left of EPC screen:

- Click **Make Graph** and select **Commercial EPC**



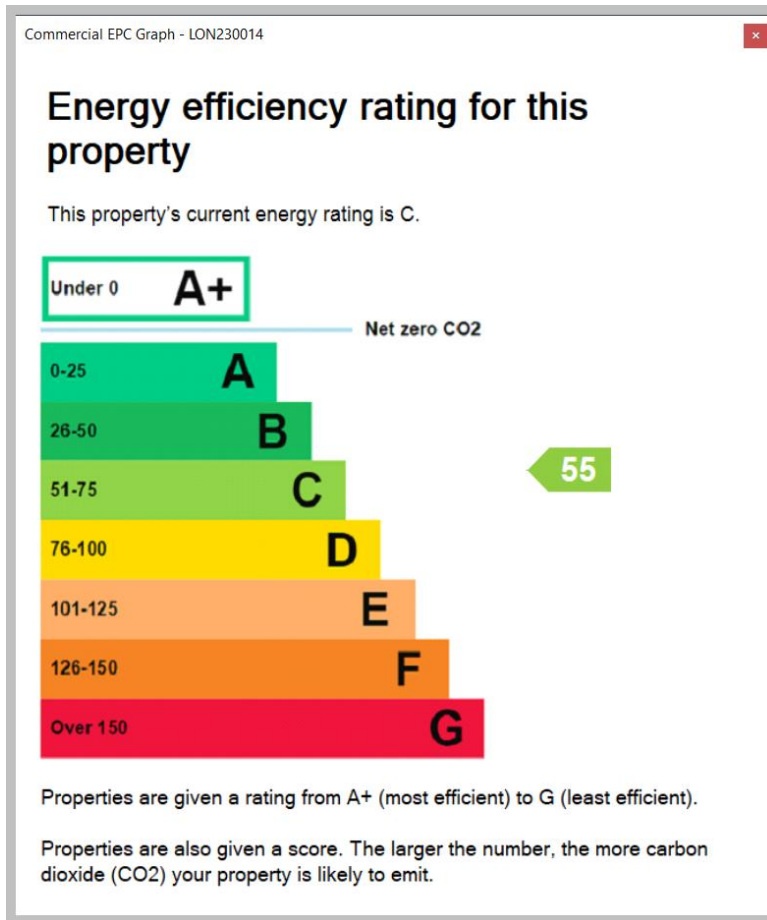
The screenshot shows the EPC management interface. At the top, there are three buttons: 'Make Graph' (with a checkmark icon), 'View Graph' (with a bar chart icon), and 'Add Certificate' (with a plus icon). Below these buttons, there is a dropdown menu that is open, showing two options: 'Residential EPC' and 'Commercial EPC'. The 'Commercial EPC' option is highlighted. To the right of the dropdown, there is a checkbox labeled 'EPC Exempt'. Below the dropdown, there are two rows of input fields. The first row is for 'Energy Efficiency Rating', with a value of '0' and a '-' sign, followed by 'Potential' with a value of '0' and a '-' sign, and a 'Create' button. The second row is for 'Environment Impact Rating', with a value of '0' and a '-' sign, followed by 'Potential' with a value of '0' and a '-' sign. Below these rows are two text input fields for 'First Page URL' and 'Full Document URL'.

- A prompt is displayed - click **Yes/No** as required

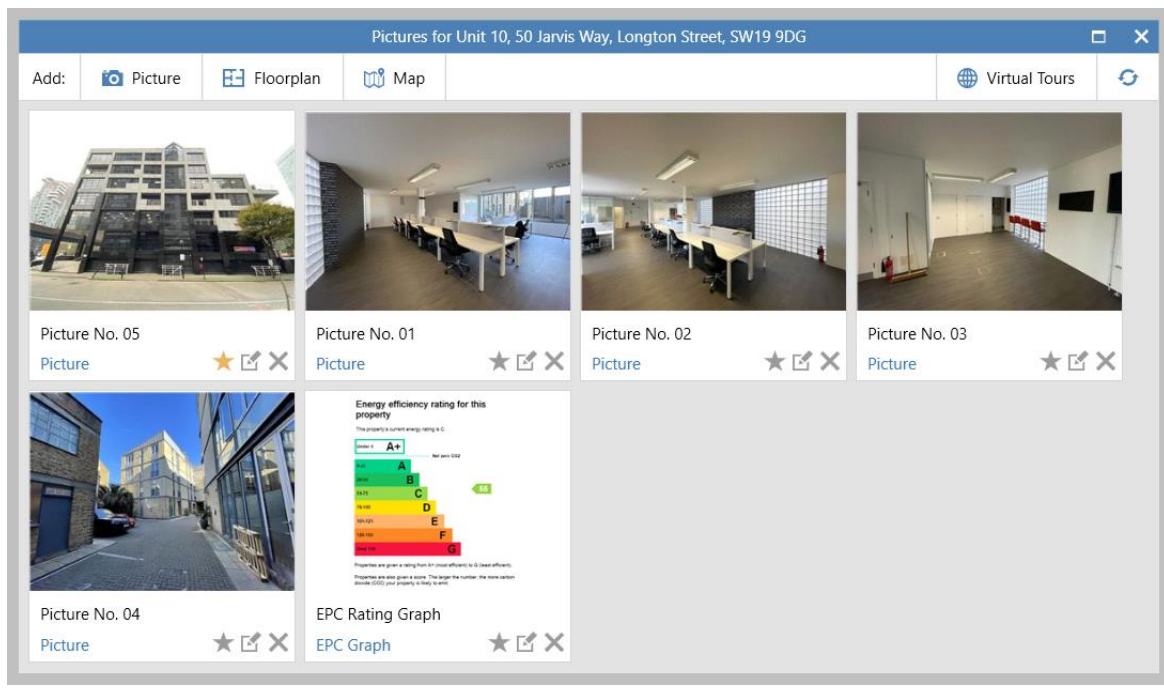


The screenshot shows a confirmation dialog box titled 'Confirm'. The main text inside the dialog reads 'EPC graph created successfully. View now?'. At the bottom of the dialog, there are two buttons: 'Yes' (highlighted in blue) and 'No' (in a light gray box).

- If **Yes** is clicked, the graph image is displayed on screen



- The image is automatically added to the property pictures gallery and is assigned the image type of **EPC Graph**

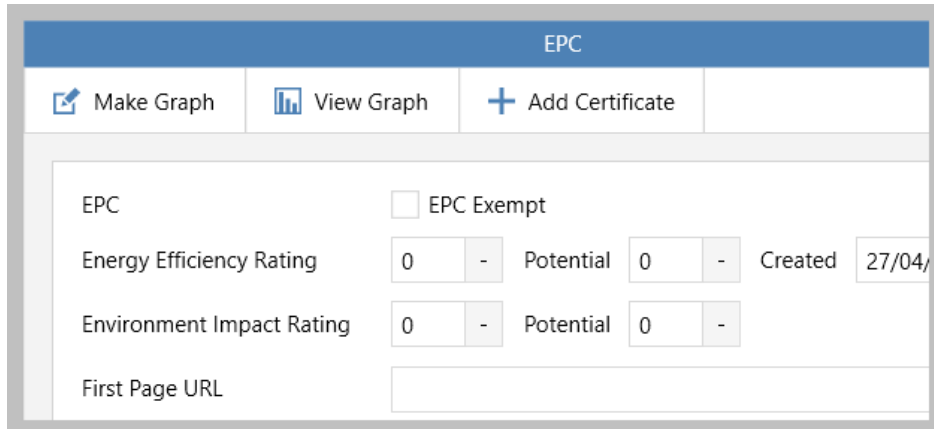


3. View graph

When a commercial EPC graph image has been generated (as outlined in step 2), the image can be viewed from the EPC screen

From top left of EPC screen:

- Click **View Graph**



The screenshot shows the EPC screen interface. At the top, there is a blue header bar with the text "EPC". Below the header, there are three buttons: "Make Graph" (with a checkmark icon), "View Graph" (with a bar chart icon), and "Add Certificate" (with a plus icon). The main content area contains several fields:

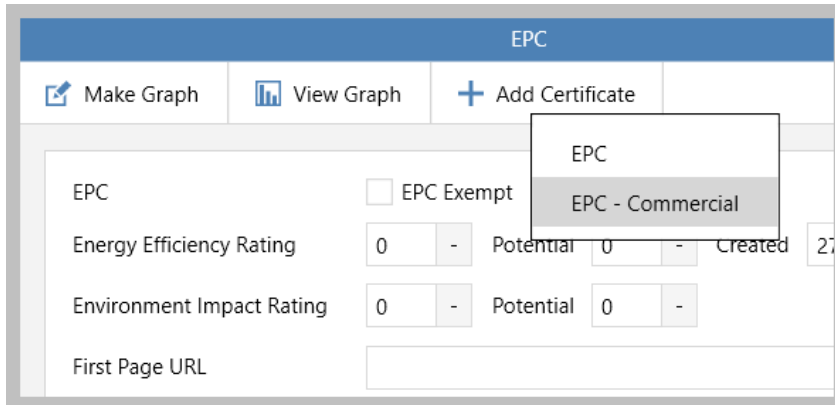
- EPC**: A checkbox labeled "EPC Exempt" is present.
- Energy Efficiency Rating**: A field with a value of "0" and a minus sign, followed by "Potential" and another field with a value of "0" and a minus sign. To the right is a "Created" field with the date "27/04/".
- Environment Impact Rating**: A field with a value of "0" and a minus sign, followed by "Potential" and another field with a value of "0" and a minus sign.
- First Page URL**: An empty text input field.

4. Add certificate

An EPC certificate can be stored - this allows the EPC expiry date to be identified which can then be reported on at a later date

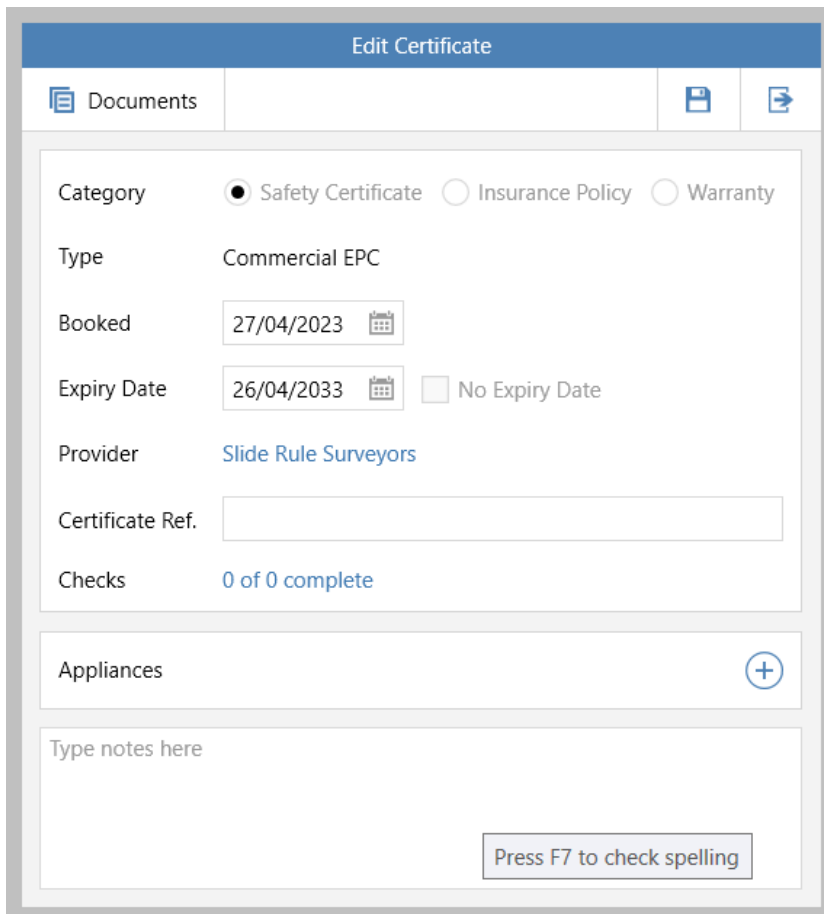
From top left of EPC screen:

- Click **Add Certificate** and select **EPC – Commercial**



The screenshot shows the 'EPC' screen with a navigation bar at the top containing 'Make Graph', 'View Graph', and 'Add Certificate'. A dropdown menu is open over the 'Add Certificate' button, showing two options: 'EPC' and 'EPC - Commercial', with 'EPC - Commercial' selected. Below the navigation bar, there are input fields for 'EPC Exempt', 'Energy Efficiency Rating', 'Environment Impact Rating', and 'First Page URL'. The 'Energy Efficiency Rating' and 'Environment Impact Rating' fields have spinners set to '0' and 'Potential' values of '0'.

- Enter certificate details, such as **Booked** and **Expiry** dates, plus **Provider**
After clicking **Save** (top right) related files can be added via **Documents** (top left)



The screenshot shows the 'Edit Certificate' screen. At the top, there is a 'Documents' button and a 'Save' button. The main form contains the following fields: 'Category' with radio buttons for 'Safety Certificate' (selected), 'Insurance Policy', and 'Warranty'; 'Type' set to 'Commercial EPC'; 'Booked' date set to '27/04/2023'; 'Expiry Date' set to '26/04/2033' with a 'No Expiry Date' checkbox; 'Provider' set to 'Slide Rule Surveyors'; 'Certificate Ref.' as an empty text field; and 'Checks' showing '0 of 0 complete'. Below these fields is an 'Appliances' section with a plus sign icon, and a 'Type notes here' text area. At the bottom right, there is a button that says 'Press F7 to check spelling'.

- Certificate details are added to the bottom of the EPC screen
Double-click to open certificate details screen again

Commercial EPC

Commercial EPC EPC Exempt

EPC Rating 55 C

EPC Created date 27/04/2023

URL to the EPC

Document File [Select ...](#)

Start Date	End Date	Certificate No	Supplier
27/04/2023	26/04/2033		Slide Rule Surveyors

▶ Show HIP ordering

Reporting on commercial EPC certificates

When a commercial EPC certificate is added, a property certificates report can be run

For example, this report will return all sales properties with a Commercial EPC certificate stored that is due to end/expire in the next 3 months

Property Report ▼ Sales ▼
[Pick Property Criteria](#)

Property has certificates ▼
[Pick Certificate Criteria](#)

Type any of ▼ Commercial EPC × ▼ ×

End Date in preset range ▼ Next ▼ 3 ↕ Months ▼ 01/05/2023 to 31/07/2023 ×

The report criteria can be saved then added as a category on an Organiser panel - for more information on:

- saving Power Report criteria, see Knowledge Base guide titled: **Saving Power Report criteria and sharing reports**
- adding categories to an Organiser panel, see Knowledge Base guide titled: **Adding and removing categories on the Organiser**

5. Reporting on commercial EPCs

a. Property report criteria - three criteria options have been added when reporting on properties

From Power Reports:

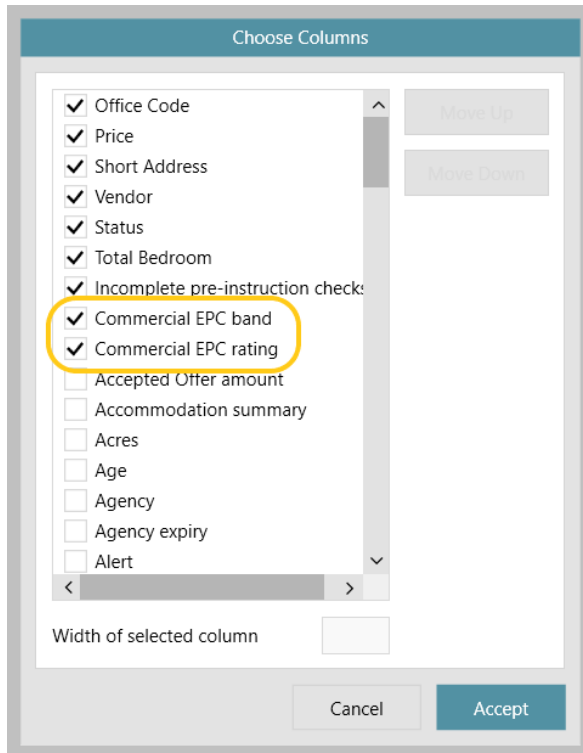
- Select **Property Report** type then select **Sales/Lettings**, as required, then click **Show more**
- Criteria options for reporting on commercial EPCs are available:
 - **Commercial EPC band**
 - **Commercial EPC exempt**
 - **Commercial EPC rating**

The screenshot displays the 'New Property Report' interface. At the top, there are three icons: 'New' (pencil), 'Save' (floppy disk), and 'Exit' (arrow). Below the title, there is a search bar and a 'Prede' button. The main content area is divided into three columns of criteria options. The first column includes 'Address', 'Amended', 'Area', 'Brief Description', 'Client Accts Assistant', 'Commercial EPC band', 'Commercial EPC exempt', 'Commercial EPC rating', 'Council tax band', 'Country', 'Details approved', and 'EPC Band'. The second column includes 'Double Bedrooms', 'Floor', 'Location/Parking', 'Reception Room', 'Single Bedrooms', 'Situation', 'Special', 'Style', 'Total Bedroom', 'Type', and 'Accepted offer date'. The third column includes 'Documents', 'Journal Entries', 'Keys', 'Landlord', 'Local Authority', 'Messages & Tasks', 'Mortgage Broker', and 'Mortgage Lender'. The 'Commercial EPC band', 'Commercial EPC exempt', and 'Commercial EPC rating' options are highlighted with a yellow box. The 'Sales' dropdown menu is also visible.

b. Report results grid - the property grid, seen after running a report or when viewing properties via the Organiser, can also show commercial EPC information

From the report results grid (or property list accessed via the Organiser):

- Right-click over the column headings, select **Pick columns** and click **More**
- Tick **Commercial EPC band** and **Commercial EPC rating** then click **Accept**



- 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 columns 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 group/filter the list by content, click to the right of the column heading (to view filter icon)



Block Management*

Additional information logged in Activity Feed on estate record

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

From AgencyCloud 12.164+, when changes are made to the following areas on the estate record, this will be logged in the Activity Feed:

- **Status**
- **Client account**
- **Pre-approved works limit**
- **Landlord**

From Estate record:

- Changes to any of the four highlighted fields will log details of the change in the **Activity Feed** on the right

The screenshot displays the AgencyCloud interface for an estate record titled 'Balmoral Hills - Registered 16/09/2021 - EST210004'. The interface includes a top navigation bar with tabs for 'Charges/Budgets', 'Appointments/Keys', 'Works', 'Invoices', 'Payments', 'Transactions', 'Reports', and 'Letters'. The main content area is divided into several sections:

- Landlord:** Mr Daniel Farringdon (highlighted with a yellow box). Landlord type: Freeholder. Bank: HSBC - A/C: 47569348 (Default).
- Management Co.:** Dorchester Living, Office. Home: 123456789. Work: 90. E-mail: rptmiketest@gmail.com.
- Relationships:** Main Office: Estates. Key Contact: Leon Graham.
- Left Panel:** Status: Management Lost (highlighted with a yellow box). Year start: 01/01/2021. Financial year start: 06/04/2021. Service charge invoicing: Quarterly. Client account: Estates Account 3 (highlighted with a yellow box). Pre-approved works limit: £200.00 (highlighted with a yellow box).
- Activity Feed:** A list of recent changes (highlighted with a yellow box) including:
 - Estate status changed from Under Management to Management Lost (A moment ago by Reapit)
 - Landlord added - Mr Daniel Farringdon (20/04/2023 by Reapit)
 - Pre-approved works limit changed from 250 to 200 (20/04/2023 by Reapit)
 - Estate status changed from Management Lost to Under Management (20/04/2023 by Reapit)
 - Landlord removed - Mr Daniel Farringdon (20/04/2023 by Reapit)
 - Pre-approved works limit changed from 200 to 250 (20/04/2023 by Reapit)