Reapit 12.178 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 for the above version

Use your Reapit software to 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)

Configuration options are available to Enterprise customers only

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

Sales & lettings/rentals

Advanced custom sales progress milestones - configuration option

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

Configurable option for Enterprise customers
To request this option to be enabled on your system, contact Reapit Support
When contacting Reapit Support, include the milestone types you wish to be added and how you would like each one to be configured (as outlined below)

If you have access to configuration screens, you can set this up yourself via the *Setup Checks/Agreements* screen, as outlined in the Knowledge Base guide titled: **Checks & agreements - how to set-up & maintain**

Advanced custom sales progress milestones can be added to the sales progress screen - this new milestone functionality provides a more advanced & customised checklist functionality, similar to other checklists available across the system

Configuration options

Advanced custom sales progress milestone functionality allows you to tailor your sales progression milestones to suit your business processes - configuration options include being able to choose:

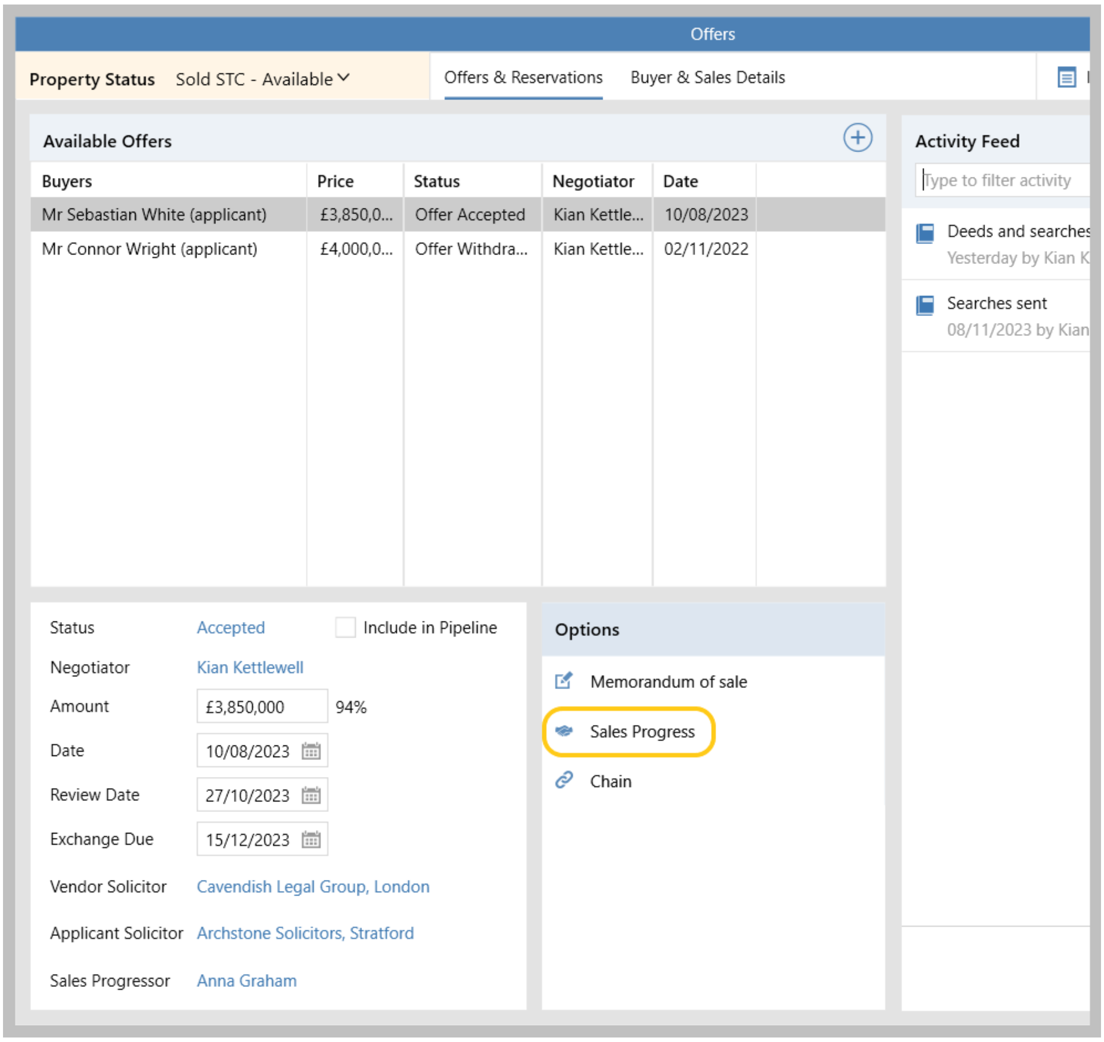
- milestone title/name
- whether a ‘required by’ date is needed
- whether a document is required for the milestone
- the response options for each milestone (e.g. sent, received)
- which response options are classed as ‘milestone completed’
- whether the milestone needs to be complete before the property exchanges
- whether the user can make changes to the milestone title and/or remove it

Reporting on advanced custom sales progress milestones will be possible in future versions

1. Access the sales progress screen

From the property screen:

- Click **Offers** and select the accepted offer
- From the **Options** panel, click **Sales Progress**



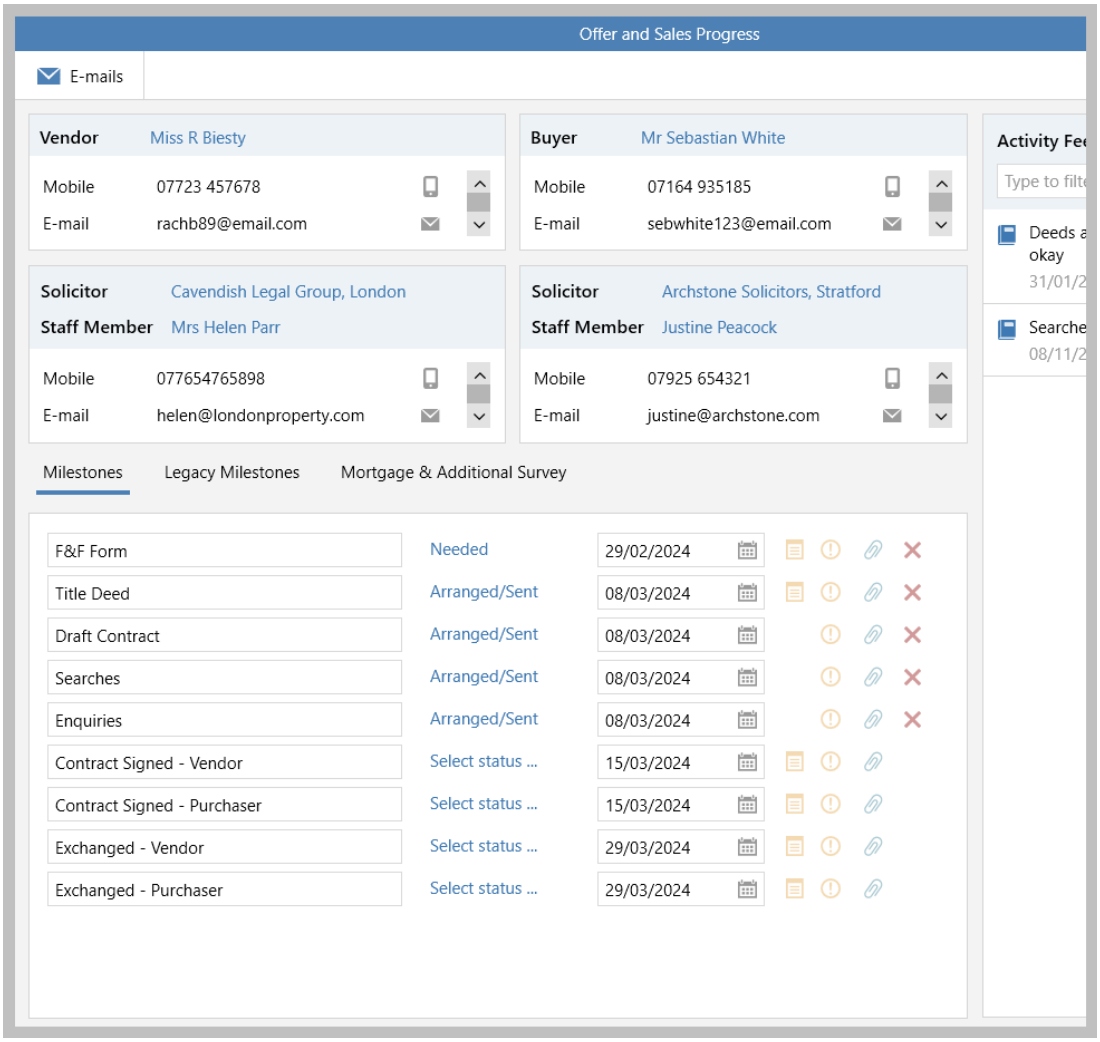
2. Access advanced custom milestones

When advanced custom milestones have been configured they will be displayed by default, as shown in the example below - when not configured, the *Milestones* tab will display the legacy milestone view instead

When advanced custom milestones have been configured, if milestone information had previously been entered, a record of these is stored in the *Legacy Milestones* tab
*See section **2a** for more information*

From Sales Progress screen:

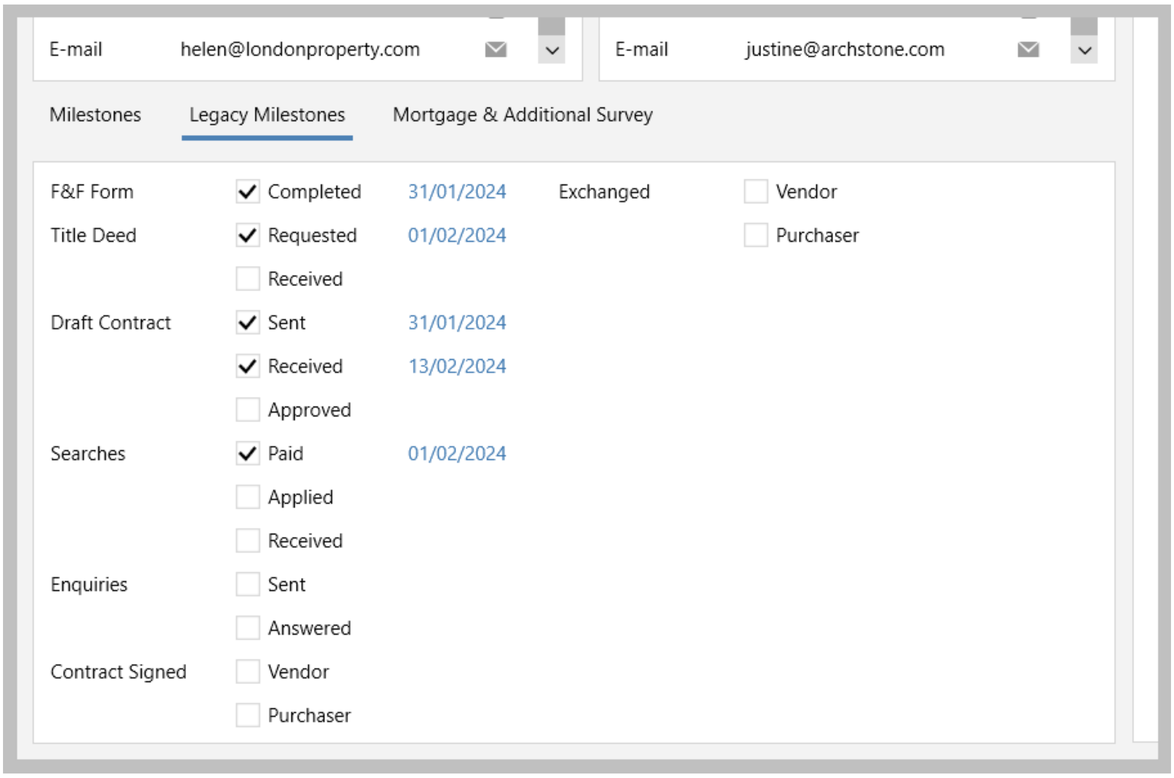
- The advanced custom **Milestones** are shown by default



All options shown above have been set-up per customer requirements and can be changed as required via configuration

2a. Legacy Milestones

The **Legacy Milestones** tab is displayed if previous/original milestone options had been entered before the advanced custom milestones were implemented on your system



3. Advanced custom milestone options

The milestone and associated options offered are dependent on configuration, see note at the bottom of this section

- **Milestone title**
  When a red cross is shown to the right of the milestone, the milestone title can be changed - clicking the red cross also allows the milestone to be removed
  Where no red cross displayed, the milestone cannot be edited or removed, as set up in configuration

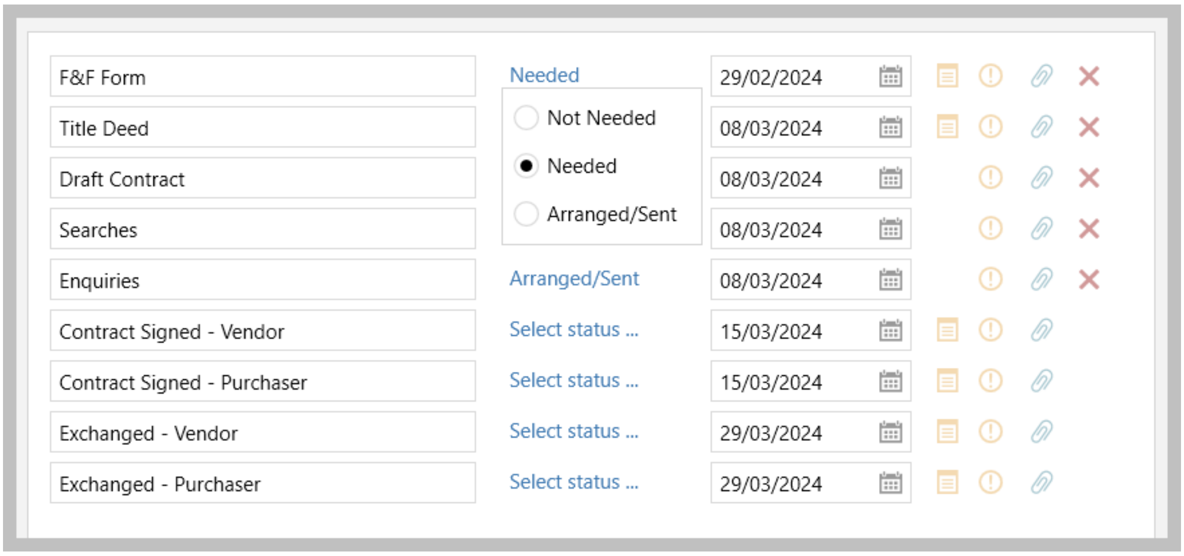
- **Milestone status**
  Status options offered are dependent on configuration
  When a document is required in order to complete a milestone, any status classed as a completion status will not be displayed (e.g. Received, Approved)

- **Milestone 'required by' date**
  Where configured, a date is shown and allows a 'required by' date to be identified for the milestone

- **Document required**
  When a document icon is displayed (to the right of the milestone) a document needs to be uploaded before the milestone can be marked as completed
  Documents are uploaded via the paperclip icon to the right of the milestone

- **Milestone required by exchange**
  When an exclamation mark icon is displayed (to the right of the milestone), the milestone must be completed before the property can be set to *Exchanged* status - this has been applied to all milestones shown below
  When a milestone is considered 'complete' is dependent on configuration

- **Paperclip icon**
  Click this icon to upload documents or view documents already uploaded for the selected milestone

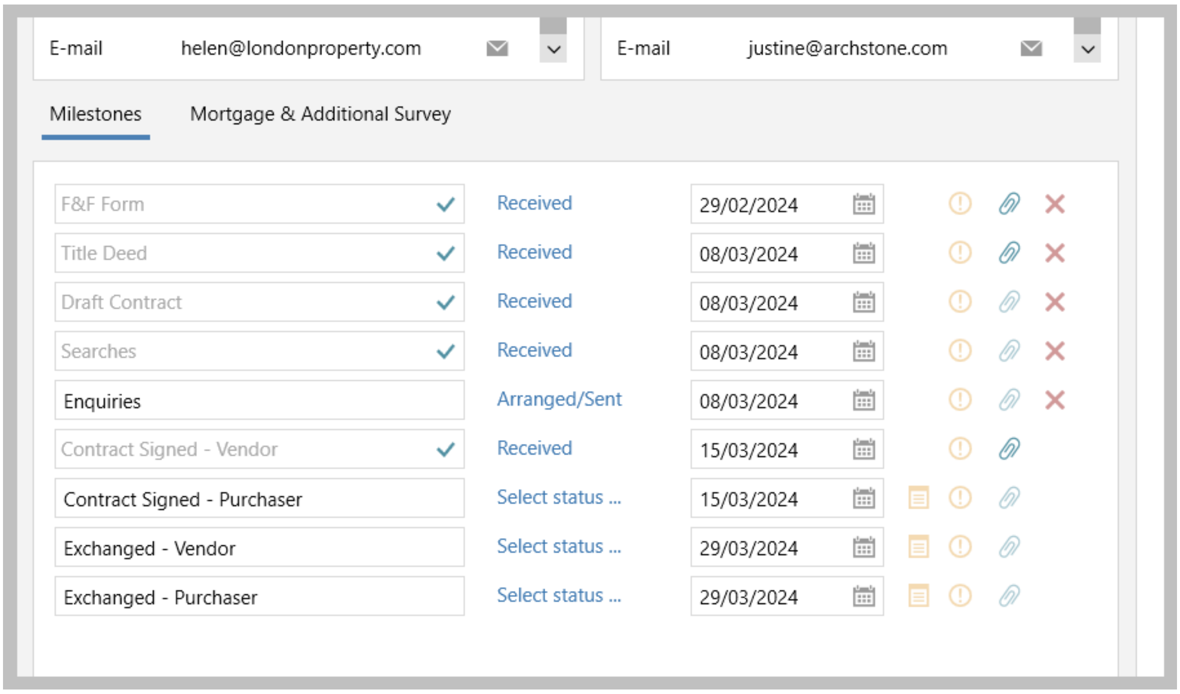


How milestones are set up is dependent on configuration - *Enterprise clients can contact Reapit Support to request setup*

Alternatively, if you have access to configuration screens, you can set this up yourself via the *Setup Checks/Agreements* screen, as outlined in the Knowledge Base guide titled: **Checks & agreements - how to set-up & maintain**

4. Completing milestones

When milestones are marked as completed, this is indicated on screen
Status options that determine the milestone being complete is dependent on configuration



Merge codes available for tenancy break clauses, allowances & responsibilities

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

Merge codes are available for break clause, allowance and responsibility information stored on the tenancy

Different merge codes are available for each title and each description for each of the agreement types, allowing them to be used and formatted independently

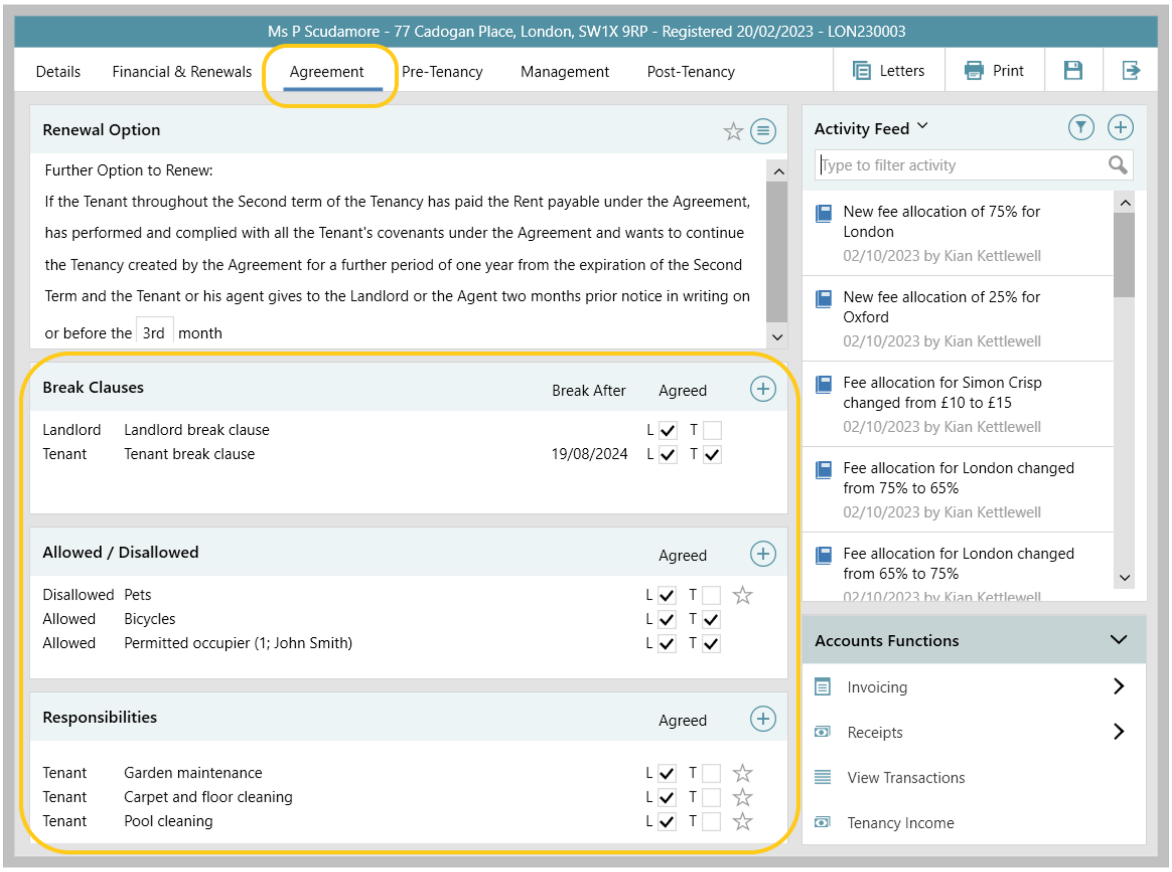
The creation of these additional merge codes allows the specific detail of break clauses, allowances and responsibilities to be used in letters and documents

Agreement information on tenancy

Details of break clauses, allowances & responsibilities are stored on the *Agreement* tab of the tenancy record - the merge codes listed in this guide pull information from here

From tenancy:

- Click **Agreement**
- All break clauses, allowances and responsibilities are stored on this screen



Further information on agreement configuration is available in the section of the Knowledge Base titled: **Configuration options (tenancy)**

Break clause merge codes

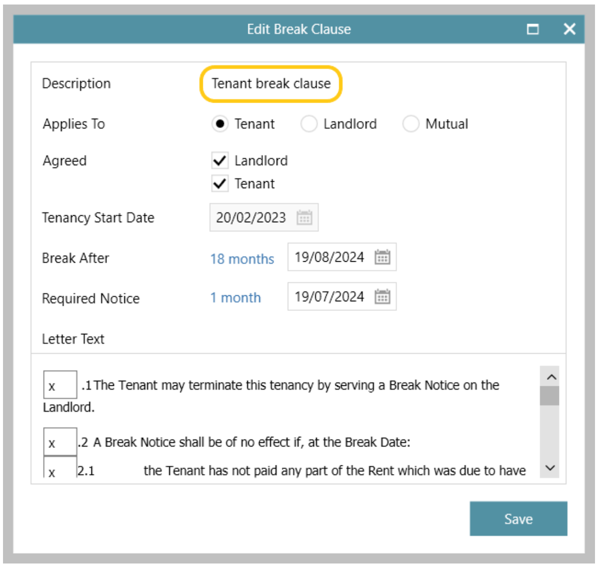
A break clause has a title and a description - separate merge codes are available for each

Break clauses in the Agreement tab

The break clause list is shown in the agreement tab of the tenancy record with the title of the break clause displayed

- Both the break clause title and description/letter text have a merge code
- The place in the list also needs to be noted as this needs to be inserted into the merge code
  For this example: *Landlord break clause* is position 0, *Tenant break clause* is position 1

Break clause title



Merge code

Merge code for the **first** title in the list:

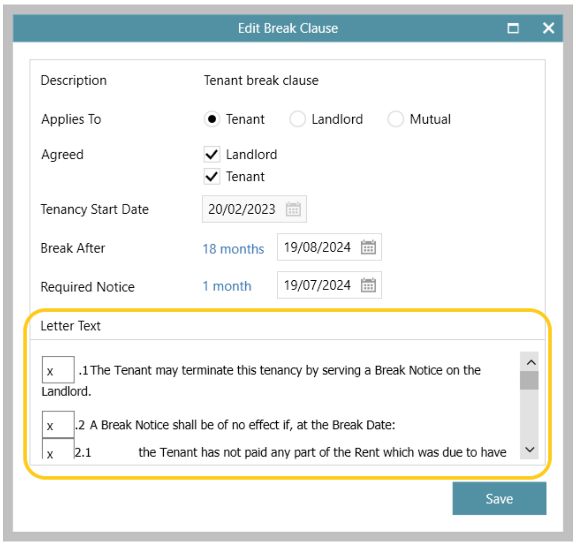
<Tenancy.GetBreakClauseTitleSelectMerge(0)>

Merge code for the **second** title in the list:

<Tenancy.GetBreakClauseTitleSelectMerge(1)>

Number 2 should be used for the third clause in the list, and so on (a number needs to be entered into the merge code to ensure that the required clause is pulled into the letter/document)

Break clause description / letter text



Merge code

Merge code for the **first** description in the list:

<Tenancy.GetBreakClauseDescSelectMerge(0)>

Merge code for the **second** description in the list is:

<Tenancy.GetBreakClauseDescSelectMerge(1)>

Number 2 should be used for the third clause in the list, and so on (a number needs to be entered into the merge code to ensure that the required clause is pulled into the letter/document)

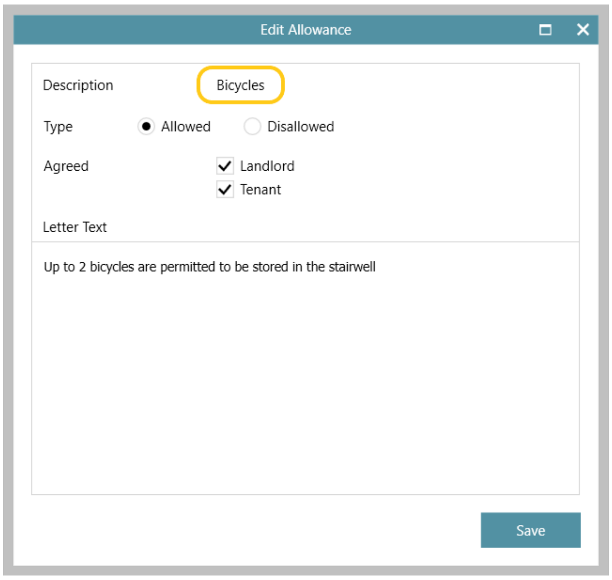
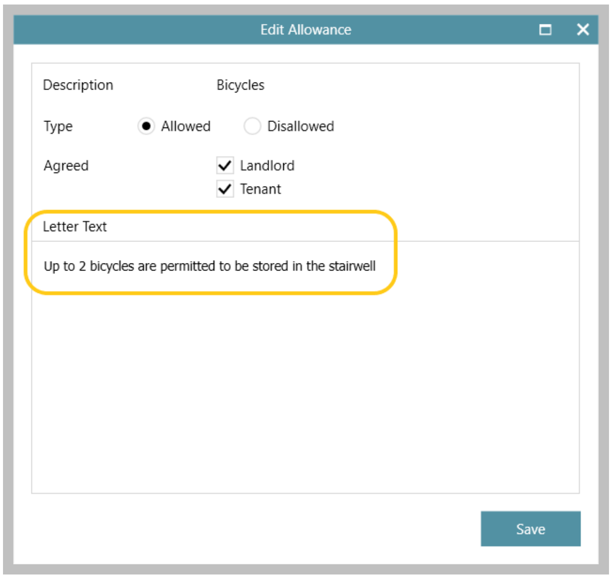
Allowance merge codes

An allowance has a title and a description - separate merge codes are available for each

Allowances in the Agreement tab

Allowances are shown in the agreement tab of the tenancy record with the title of the allowance displayed

- Both the allowance title and description/letter text have a merge code
- The place in the list also needs to be noted as this needs to be inserted into the merge code
  For this example: *Pets* is position 0, *Bicycles* is position 1, *Permitted occupier* is position 2

Allowances title  	**Merge code** Merge code for the **first** title in the list: <Tenancy.GetAllowTitleSelectMerge(0)> Merge code for the **second** title in the list: <Tenancy.GetAllowTitleSelectMerge(1)> *Number 2 should be used for the third allowance in the list, and so on (a number needs to be entered into the merge code to ensure that the required allowance is pulled into the letter/document)*
Allowances description / letter text  	**Merge code** Merge code for the **first** description in the list: <Tenancy.GetAllowDescSelectMerge(0)> Merge code for the **second** description in the list is: <Tenancy.GetAllowDescSelectMerge(1)> *Number 2 should be used for the third allowance in the list, and so on (a number needs to be entered into the merge code to ensure that the required allowance is pulled into the letter/document)*

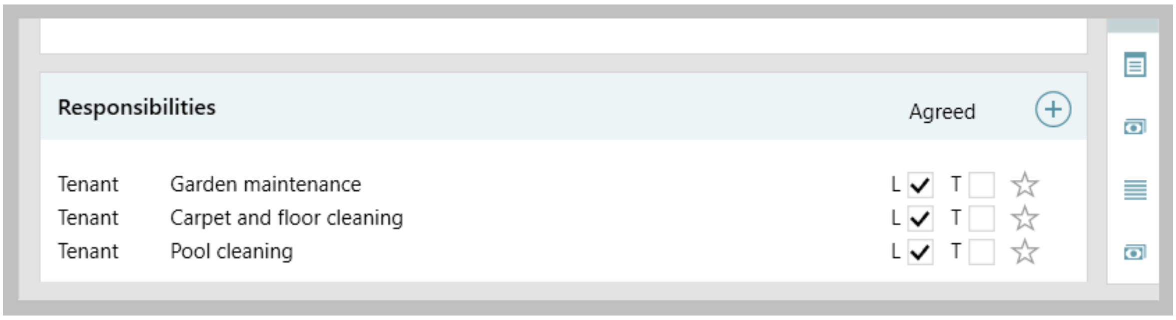
Responsibility merge codes

A responsibility has a title and a description - separate merge codes are available for each

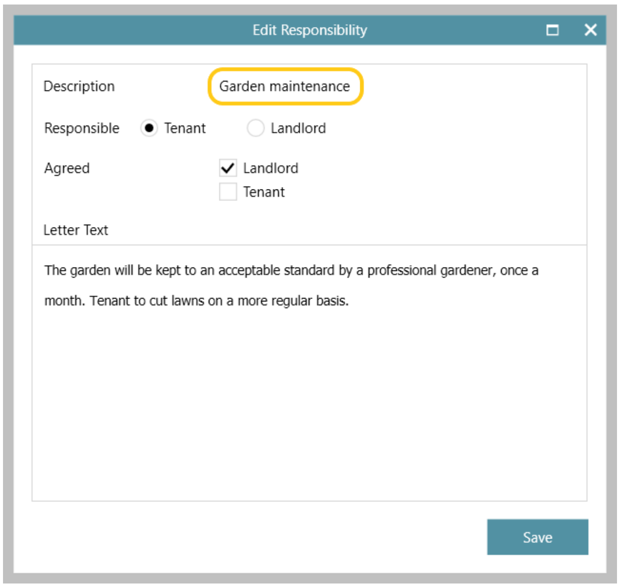
Responsibilities in the Agreement tab

Responsibilities are shown in the agreement tab of the tenancy record with the title of the responsibility displayed

- Both the responsibility title and description/letter text have a merge code
- The place in the list also needs to be noted as this needs to be inserted into the merge code
  For this example: *Garden maintenance* is position 0, *Carpet and floor cleaning* is position 1, *Pool cleaning* is position 2



Responsibilities title



Merge code

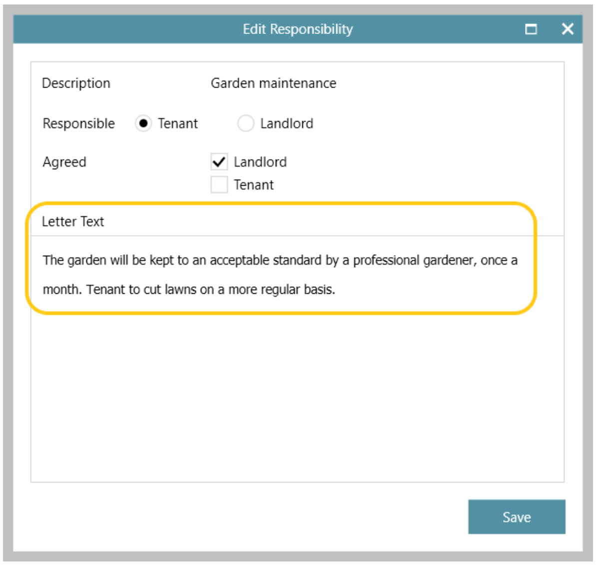
Merge code for the **first** title in the list:

<Tenancy.GetRespTitleSelectMerge(0)>

Merge code for the **second** title in the list:

<Tenancy.GetRespTitleSelectMerge(1)>

Number 2 should be used for the third responsibility in the list, and so on (a number needs to be entered into the merge code to ensure that the required responsibility is pulled into the letter/document)

Responsibilities description / letter text	Merge code
 	Merge code for the **first** description in the list: <Tenancy.GetRespDescSelectMerge(0)> Merge code for the **second** description in the list is: <Tenancy.GetRespDescSelectMerge(1)> *Number 2 should be used for the third responsibility in the list, and so on (a number needs to be entered into the merge code to ensure that the required responsibility is pulled into the letter/document)*

Using formatting and/or numbered lists for merge codes

Formatting

Entering a merge code using formatting will pull that formatting through to the letter/document itself - e.g. bold

Numbered lists

A numbered list can be generated by adding 'true' to the right of the number within the brackets at the end of the merge code - e.g. <Tenancy.GetAllowTitleSelectMerge(0,true)>

If the number is not to be included then this would be entered: <Tenancy.GetAllowTitleSelectMerge(0)>

Example

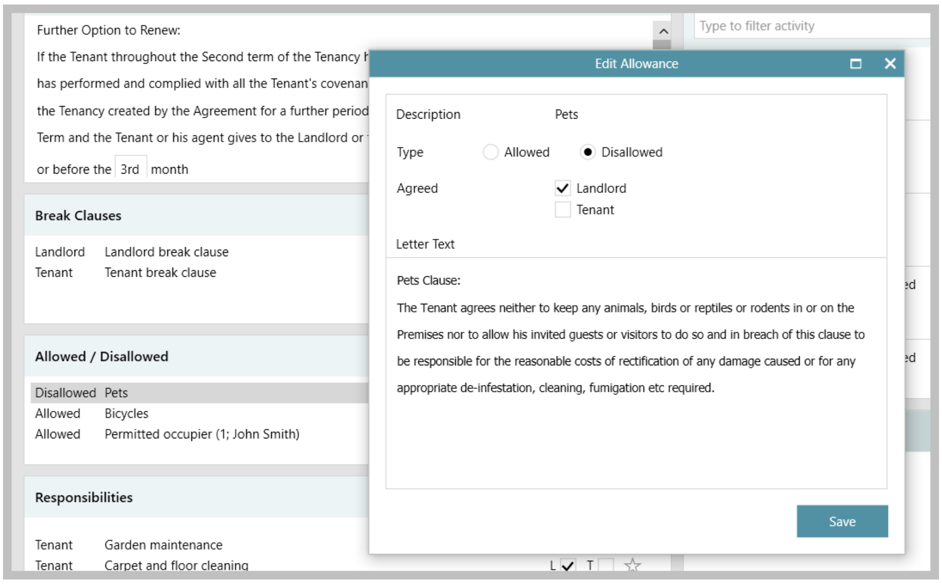
For example, to pull the title and description into a document for the first allowance shown in the example below (i.e. Pets) - to show:

- the title in bold
- a number beside the title

The following merge codes would need to be used in the template:

<Tenancy.GetAllowTitleSelectMerge(0,true)>

<Tenancy.GetAllowDescSelectMerge(0)>



This will display the following text in a letter/document:

1. Pets

Pets Clause:

The Tenant agrees neither to keep any animals, birds or reptiles or rodents in or on the Premises nor to allow his invited guests or visitors to do so and in breach of this clause to be responsible for the reasonable costs of rectification of any damage caused or for any appropriate de-infestation, cleaning, fumigation etc required.

Number **1.** is shown next to this allowance due to it being the first entry in the list of allowances on the Agreement tab

Email copy of final inspection report after upload via inspection diary appointment - configuration option

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

Configurable option for Enterprise customers
However, if your system already generates an email following an upload from the document importer tool, no further configuration is required

This feature is applicable when configuration is in place which allows draft and final property inspection report documents to be uploaded to a property inspection appointment, as outlined in the Knowledge Base guide titled: **Store documents against property inspection - configuration option**

To request these options to be enabled on your system, contact Reapit Support

A configuration option is available which automatically creates an email when a final inspection report is uploaded via the inspection diary appointment

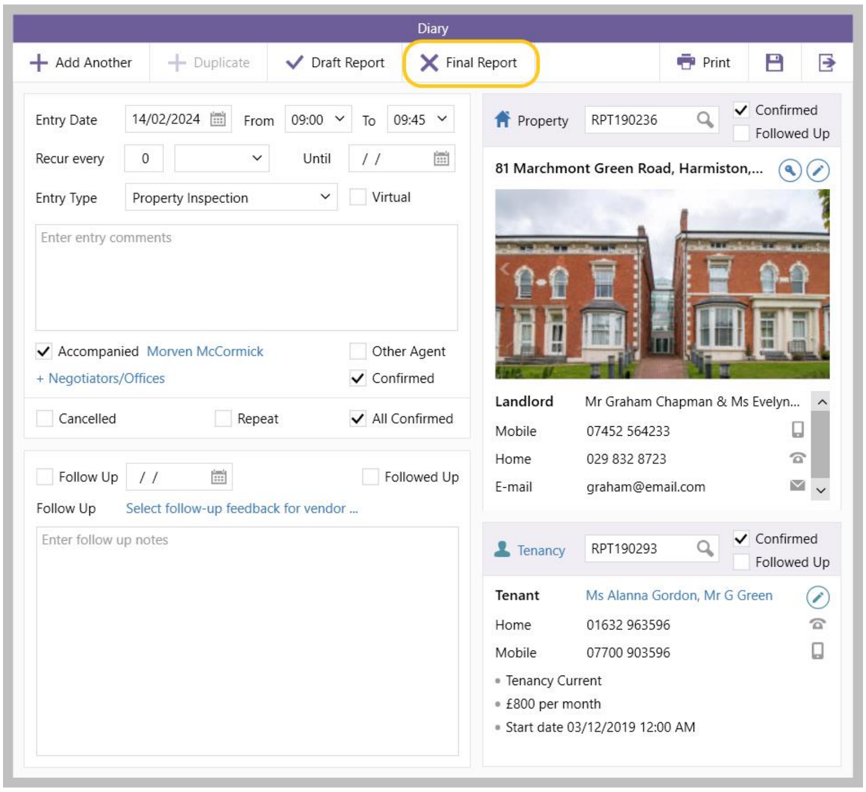
The email generated is addressed to the landlord(s) using a specific template, which would usually contain a covering letter along with an attached copy of the PDF inspection document

Upload final report

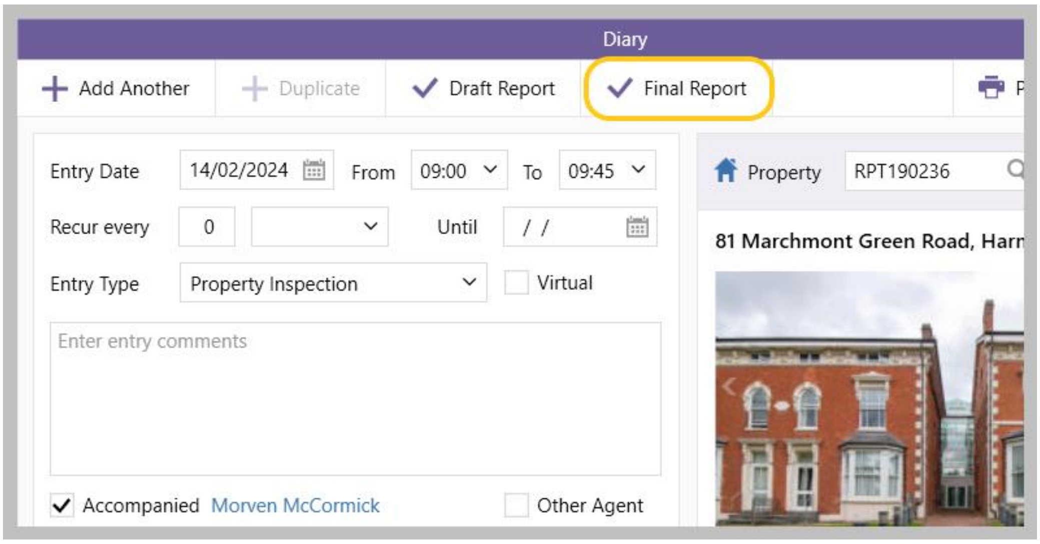
An email will be generated when uploading a final inspection report (not a draft report) from the inspection diary appointment

From inspection diary appointment:

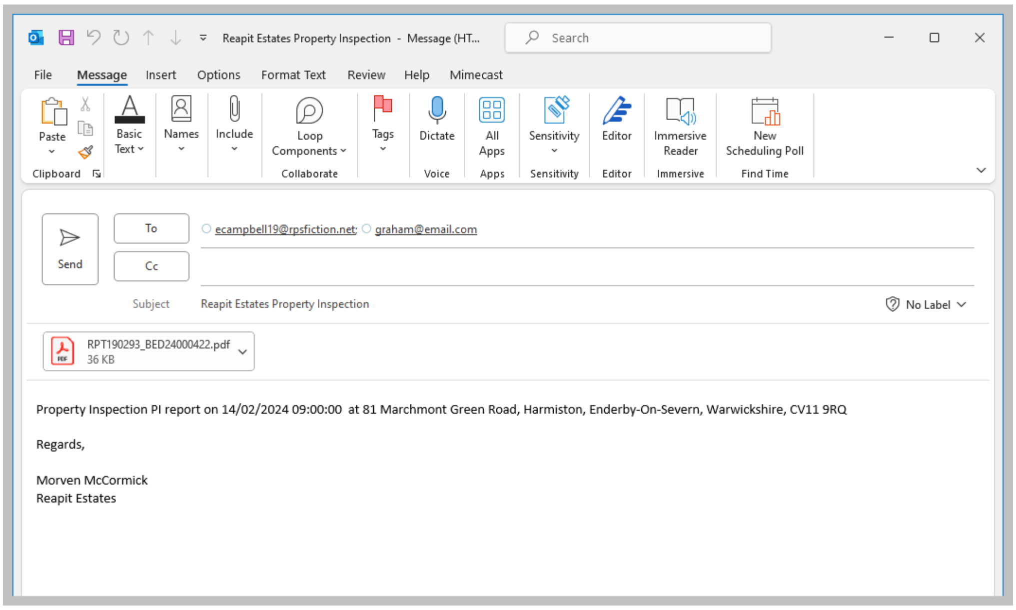
- Click **Final Report**



- A window will be displayed to allow you to browse to the report on your device - double-click when found
- The final report is uploaded to the Property Inspection *(as indicated by the tick beside Final Report)*



- An email will be automatically generated - the report is attached to the email and the landlord email addresses entered, where saved on the system



This configuration will also automatically generate an email when uploading the final report via the document importer, as outlined in the Knowledge Base guide titled:
Email copy of final inspection report after upload via document importer - configuration option

For more information about the document importer, see Knowledge Base guide titled:
Import and attach documents in bulk via document importer - configuration option

Accounts*

Access to landlord account details on property rent/fee details

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

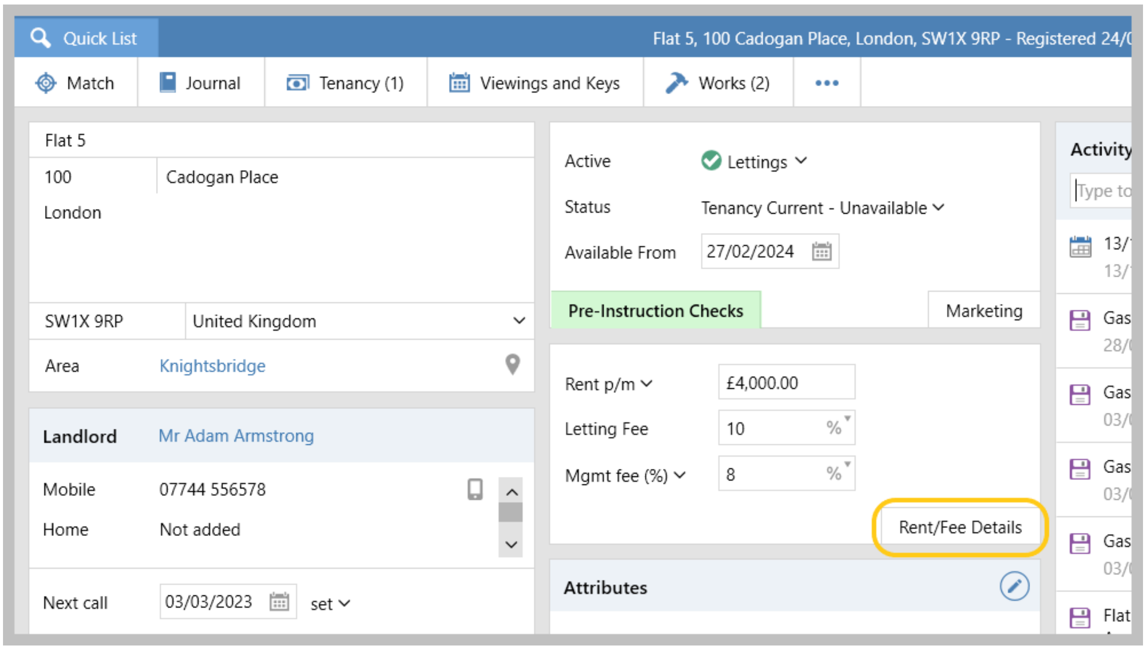
This option is available by default - however, Enterprise customers can request that security settings are applied to disable access to the option for selected users/groups
To request this to be enabled on your system, contact Reapit Support

Access to landlord account information is now available to all users via a link on the property rent/fee details screen - this information can also be hidden from view for selected users/groups

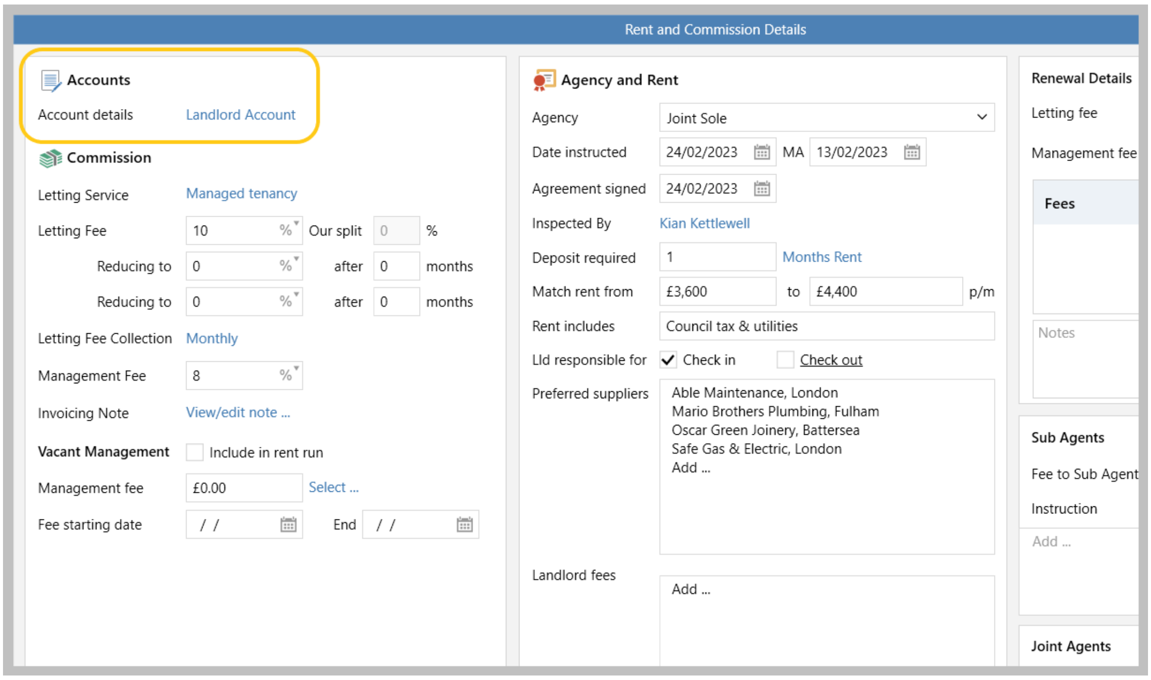
Depending on configuration, you may have previously had access to this information via the rent/fee details screen but in a different location (next to the Rent Guarantee section)

From property record:

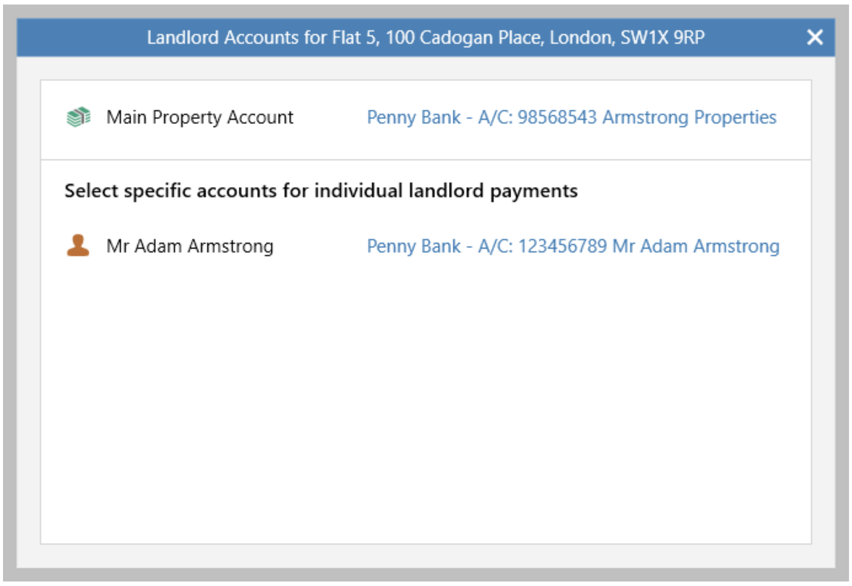
- Click **Rent/Fee Details**



- An **Accounts** section has been added (top left)



- Click **Landlord Account** to view the landlord account information



Show landlords with arrears in the arrears screen even when in net credit - configuration option

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

Configurable option for Enterprise customers
To request this option to be enabled on your system, contact Reapit Support

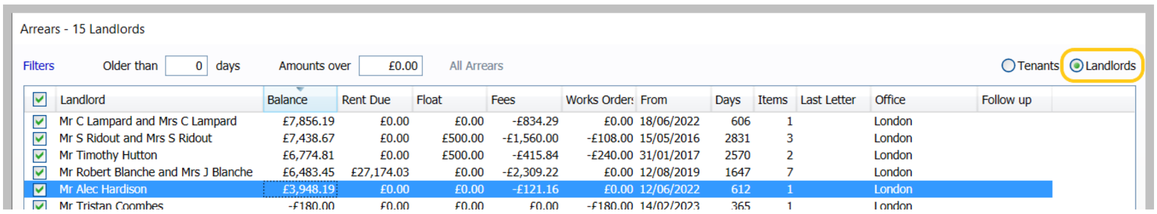
A configuration option is available which will flag landlords with arrears in the arrears screen, even when they are in net credit

For example: a landlord has arrears against 1 Long Street but also has available credit against 10 Rose Terrace, meaning that the landlord account overall is in credit - however, you still want the landlord to be flagged as in arrears to allow you to chase the arrears against 1 Long Street

With this configuration option enabled, landlords in net credit will be shown in the chase arrears screen, allowing you to chase late income and to flag to the landlord about the possibilities of using funds from other properties against the arrears

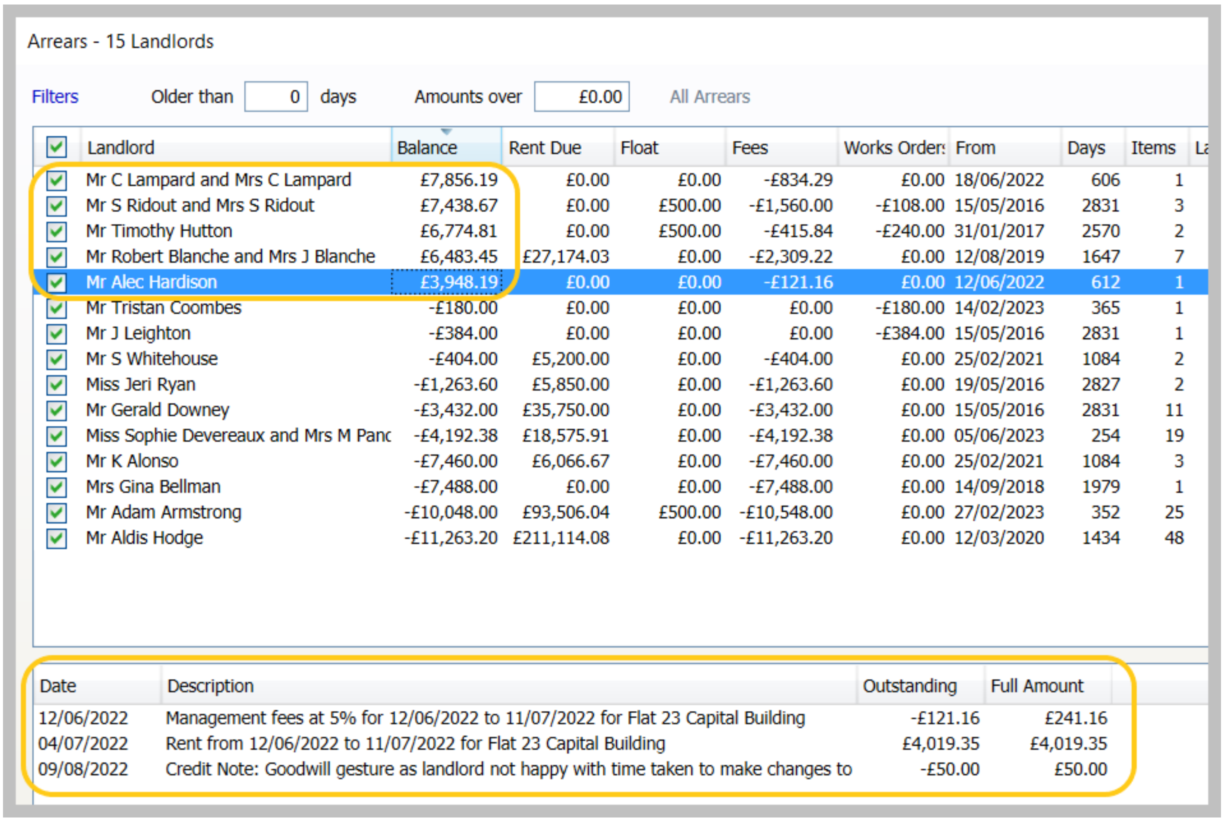
From main menu:

- Click **Lettings/Rentals** and select **Chase Arrears**
- Click **Landlords** view (on right)



See next page

- Landlords in net credit are displayed - as seen in the **Balances** column
  Click column heading to sort by balance



Arrears - 15 Landlords

Filters | Older than 0 days | Amounts over £0.00 | All Arrears

	Landlord	Balance	Rent Due	Float	Fees	Works Order:	From	Days	Items	La
☑	Mr C Lampard and Mrs C Lampard	£7,856.19	£0.00	£0.00	-£834.29	£0.00	18/06/2022	606	1	
☑	Mr S Ridout and Mrs S Ridout	£7,438.67	£0.00	£500.00	-£1,560.00	-£108.00	15/05/2016	2831	3	
☑	Mr Timothy Hutton	£6,774.81	£0.00	£500.00	-£415.84	-£240.00	31/01/2017	2570	2	
☑	Mr Robert Blanche and Mrs J Blanche	£6,483.45	£27,174.03	£0.00	-£2,309.22	£0.00	12/08/2019	1647	7	
☑	Mr Alec Hardison	£3,948.19	£0.00	£0.00	-£121.16	£0.00	12/06/2022	612	1	
☑	Mr Tristan Coombes	-£180.00	£0.00	£0.00	£0.00	-£180.00	14/02/2023	365	1	
☑	Mr J Leighton	-£384.00	£0.00	£0.00	£0.00	-£384.00	15/05/2016	2831	1	
☑	Mr S Whitehouse	-£404.00	£5,200.00	£0.00	-£404.00	£0.00	25/02/2021	1084	2	
☑	Miss Jeri Ryan	-£1,263.60	£5,850.00	£0.00	-£1,263.60	£0.00	19/05/2016	2827	2	
☑	Mr Gerald Downey	-£3,432.00	£35,750.00	£0.00	-£3,432.00	£0.00	15/05/2016	2831	11	
☑	Miss Sophie Devereaux and Mrs M Panc	-£4,192.38	£18,575.91	£0.00	-£4,192.38	£0.00	05/06/2023	254	19	
☑	Mr K Alonso	-£7,460.00	£6,066.67	£0.00	-£7,460.00	£0.00	25/02/2021	1084	3	
☑	Mrs Gina Bellman	-£7,488.00	£0.00	£0.00	-£7,488.00	£0.00	14/09/2018	1979	1	
☑	Mr Adam Armstrong	-£10,048.00	£93,506.04	£500.00	-£10,548.00	£0.00	27/02/2023	352	25	
☑	Mr Aldis Hodge	-£11,263.20	£211,114.08	£0.00	-£11,263.20	£0.00	12/03/2020	1434	48	

Date	Description	Outstanding	Full Amount
12/06/2022	Management fees at 5% for 12/06/2022 to 11/07/2022 for Flat 23 Capital Building	-£121.16	£241.16
04/07/2022	Rent from 12/06/2022 to 11/07/2022 for Flat 23 Capital Building	£4,019.35	£4,019.35
09/08/2022	Credit Note: Goodwill gesture as landlord not happy with time taken to make changes to	-£50.00	£50.00

Click on entry to see detail of the arrears in the panel at the bottom of the screen