

Reapit 12.181 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

Sales & lettings/rentals.....	2
ID check report enhancements - including RTR & Landlord Registration reporting	2
Generate EPC graph using EPC figures from third party app (via API)	12
Ground rent review frequency can be added to a sales property	18
Property attribute screen update to allow utilities & additional property information to be logged	20
Accounts*	23
Enhancements to unallocated tenant receipts screen - including adding notes to receipts	23
Add, edit & save tenancy fees on initial tenant invoice without posting it	26
Goodwill payment credit included in the tenancy income report	29

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

ID check report enhancements - including RTR & Landlord Registration reporting

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

Right to Rent (RTR) & Landlord Registration options may not be enabled on your system - these options are available for Enterprise customers

To request this option to be enabled on your system, contact Reapit Support

Enhancements have been made to allow reports to be generated for:

- ID checks
- Right to Rent (RTR) checks (where enabled)
- Landlord Registration checks (where enabled)

Each report option is detailed in the following pages

1. ID check reports

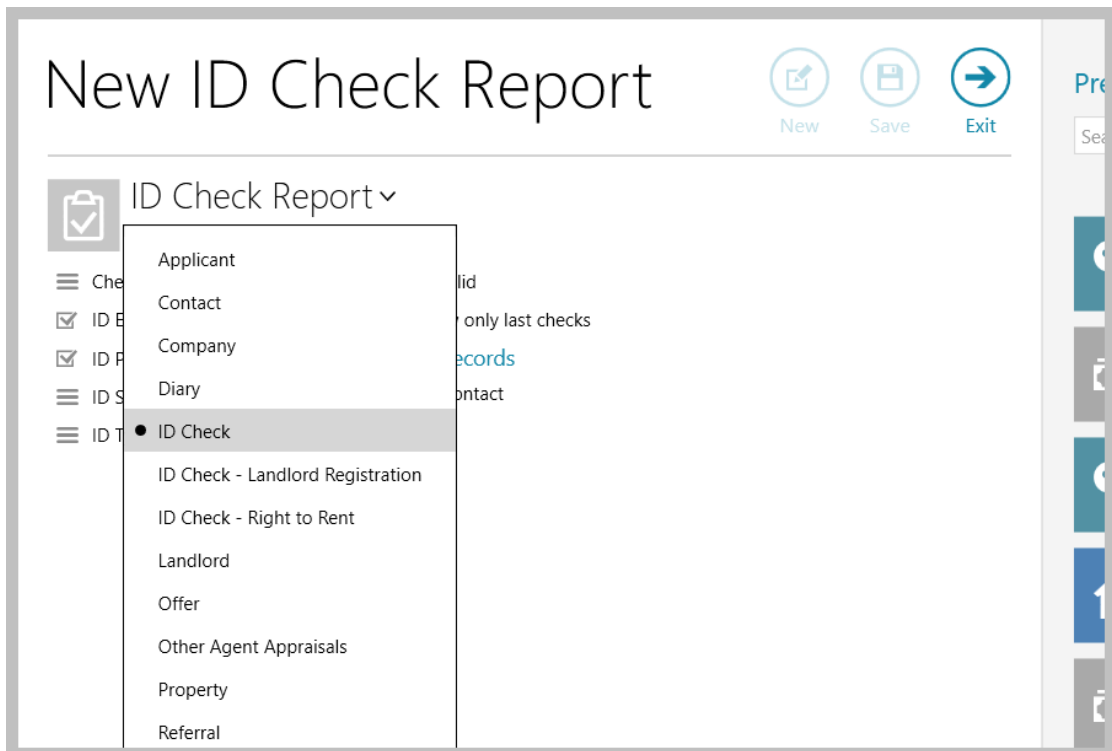
From version 12.181, ID check reports are created as a report type with enhanced criteria options available

The ability to report on ID was available prior to version 12.181, but it had limited ID check criteria options and ID check criteria was only available as a linked record/sub-report when carrying out a contact report

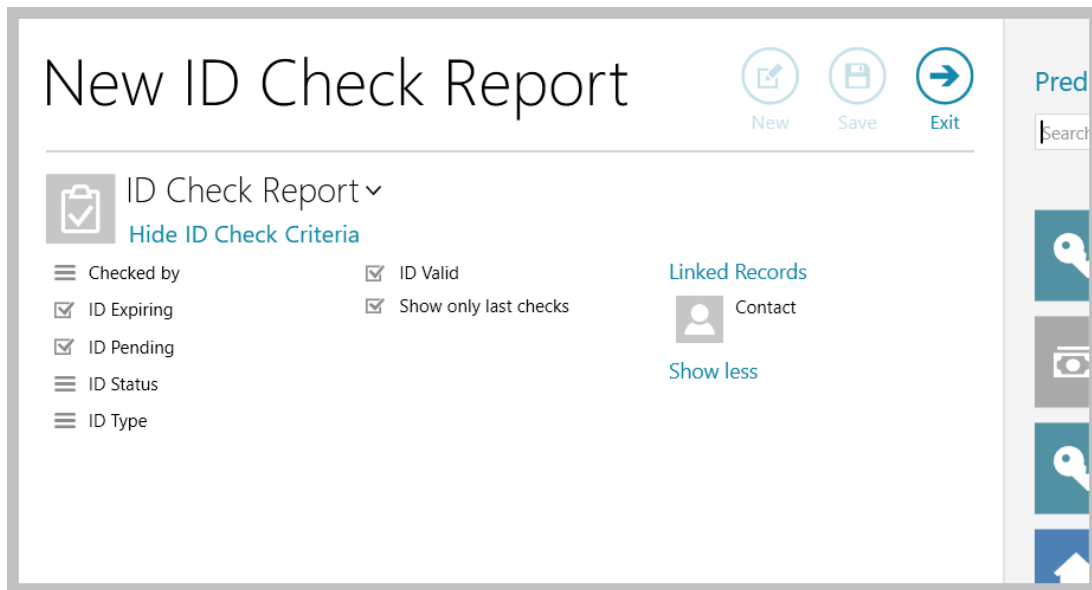
For more information on adding ID check information, see Knowledge Base article titled: **Enter & report on ID**

From main menu:

- Click **Reports** then **Power Reports** and select report type of **ID Check**



- The ID Check Report criteria options will be shown
Where applicable, click **Show more** to see all available options

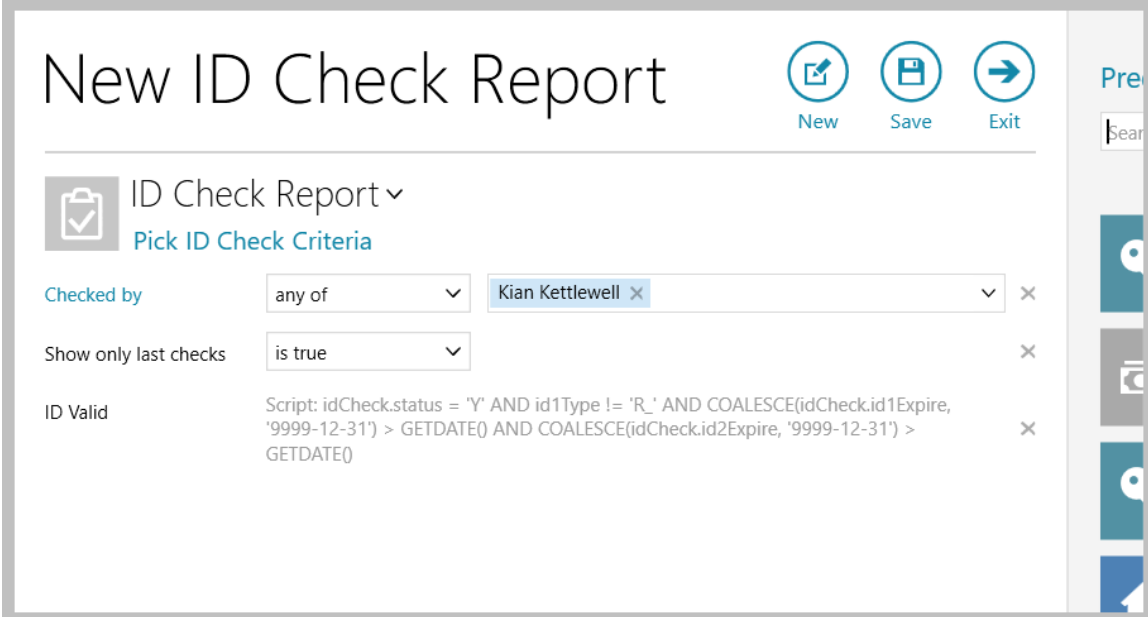


ID Check Report criteria options include:

- **Checked by:** allows the report to be filtered by one/more users who carried out the check
This option was available prior to 12.181
- **ID Expiring:** selecting this option filters the report to only show checks that are flagged as expiring
When an ID is classed as 'expiring' is dependent on configuration settings - e.g. configuration could dictate that ID is classed as 'expiring' when it is 30 days before its actual expiry date
- **ID Pending:** returns ID that has the status of 'pending'
This option was available prior to 12.181
- **ID Status:** select one/more overall ID status options to report on - options are: *Cancelled, Failed, In Progress, Successful, Unchecked*
- **ID Type:** select the ID type(s) to report on
This option was available prior to 12.181
- **ID Valid:** selecting this option filters the report to only show checks that are valid - i.e. ID that has not expired and is not cancelled
- **ID Warning:** *not shown above - this is an extra status option available with custom configuration for ID, typically when using Lexis Nexis*
When enabled, this criteria option allows you to filter the report by warning status
- **Show only last checks:** when selected, will only show the latest ID check for a contact - if not selected, all ID checks will be shown for a contact
- **Linked Records** - allows **Contact** criteria to be added to the ID check report

Example report

This report will return details of ID checks that were checked by Kian Kettlewell, where the ID is valid and, when a contact has multiple ID check records, only the latest checks will be shown



The screenshot shows a software interface for creating a report. The title is "New ID Check Report". At the top right, there are three circular icons labeled "New", "Save", and "Exit". Below the title, there is a section for "ID Check Report" with a dropdown arrow and a link "Pick ID Check Criteria". The interface includes three filter rows, each with a label, a dropdown menu, a text input field, and a close button (X):

- Checked by:** The dropdown is set to "any of", and the text input field contains "Kian Kettlewell".
- Show only last checks:** The dropdown is set to "is true".
- ID Valid:** The text input field contains a SQL script: `Script: idCheck.status = 'Y' AND id1Type != 'R_' AND COALESCE(idCheck.id1Expire, '9999-12-31') > GETDATE() AND COALESCE(idCheck.id2Expire, '9999-12-31') > GETDATE()`.

On the right side of the interface, there is a vertical sidebar with a search bar and several application icons.

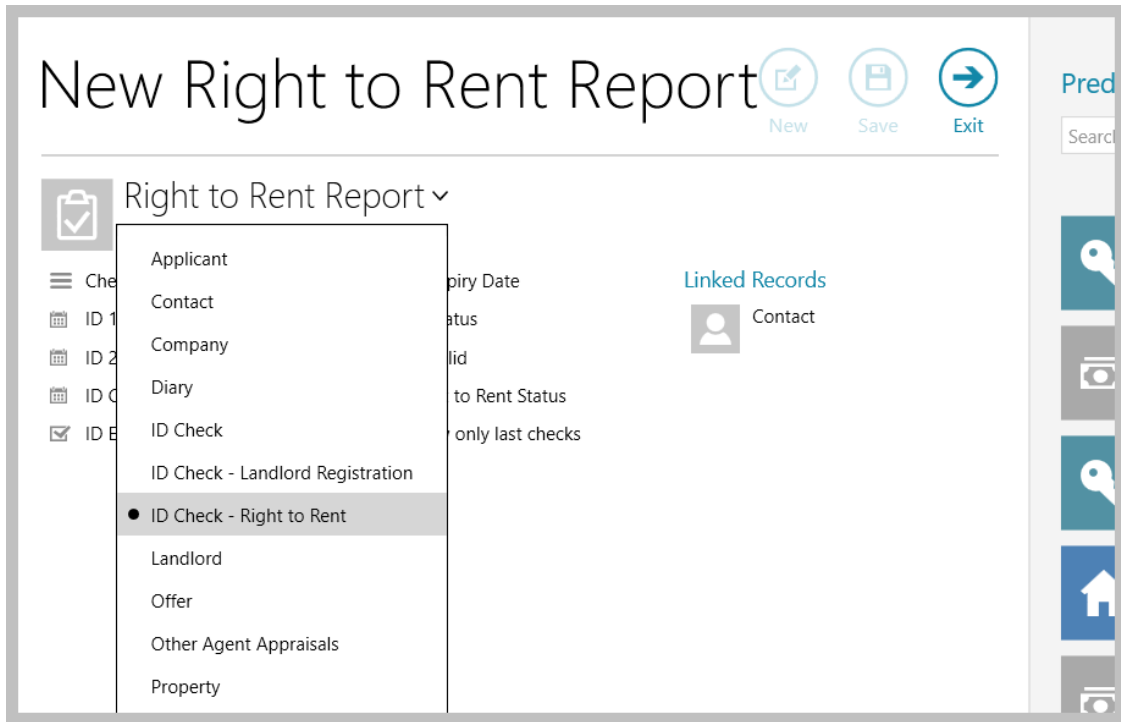
Some criteria options available via ID check reporting have no selectable option and will present code instead, as seen for the selected *ID Valid* criteria option shown above

2. Right to Rent (RTR) check reports

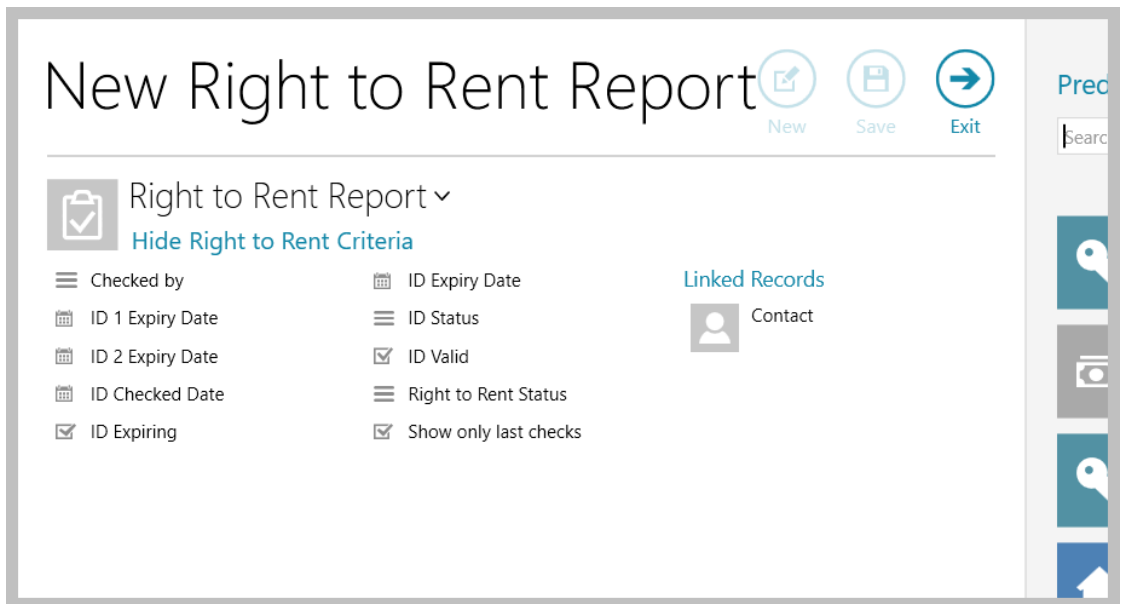
The option to report on RTR checks is only available when RTR ID check functionality is enabled
For more information on RTR check functionality, see Knowledge Base article titled: **Right to Rent (RTR) ID check - configuration option**

From main menu:

- Click **Reports** then **Power Reports** and select report type of **ID Check - Right to Rent**



- The Right to Rent Report criteria options will be shown

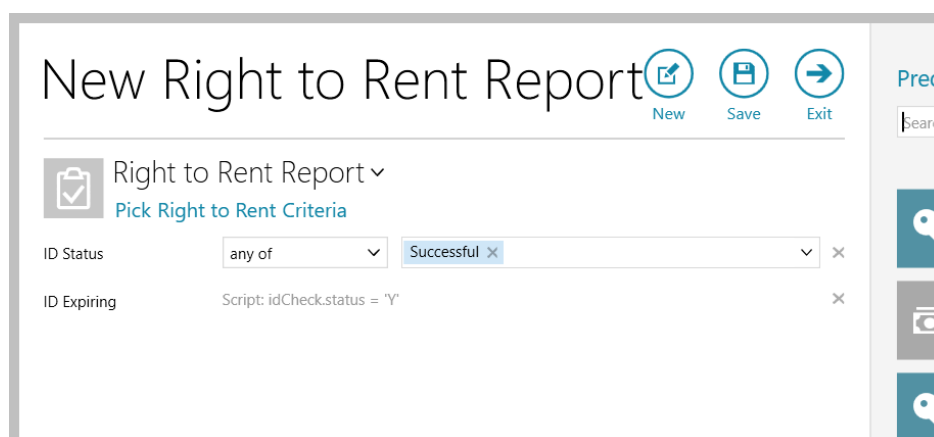


Right to Rent (RTR) Report criteria options include:

- **Checked by:** allows the report to be filtered by one/more users who carried out the check
- **ID 1 Expiry Date:** allows the report to be filtered by the expiry date of the Primary ID type entered for the RTR check - options are available to report on expiry dates within a preset range or before/after a specific date
- **ID 2 Expiry Date:** as *ID 1 Expiry Date* but for the Secondary ID type entered for the RTR check
- **ID Checked Date:** allows the report to be filtered by the RTR ID check date - options are available to report on RTR ID check dates within a preset range or before/after a specific date
- **ID Expiring:** selecting this option filters the report to only show RTR checks that are flagged as expiring
When a RTR check is classed as 'expiring' is dependent on configuration settings - e.g. configuration could dictate that the RTR check is classed as 'expiring' when it is 30 days before its actual expiry date
- **ID Expiry Date:** allows the report to be filtered by the RTR check overall expiry date - options are available to report on expiry dates within a preset range or before/after a specific date
- **ID Status:** select one/more overall RTR ID check status options to report on - options are: *Cancelled, Failed, In Progress, Successful, Unchecked*
- **ID Valid:** selecting this option filters the report to only show checks that are valid - i.e. a RTR check that has not expired and is not cancelled
- **Right to Rent Status:** select one/more overall RTR status options to report on - options are: *No right to reside, Permanent right to reside, Time limited right to reside*
- **Show only last checks:** when selected, will only show the latest RTR check for a contact - if not selected, all RTR checks will be shown for a contact
- **Linked Records** - allows **Contact** criteria to be added to the Right to Rent report

Example report

This report will return details of Right to Rent checks that have the status of *Successful* and are close to expiring



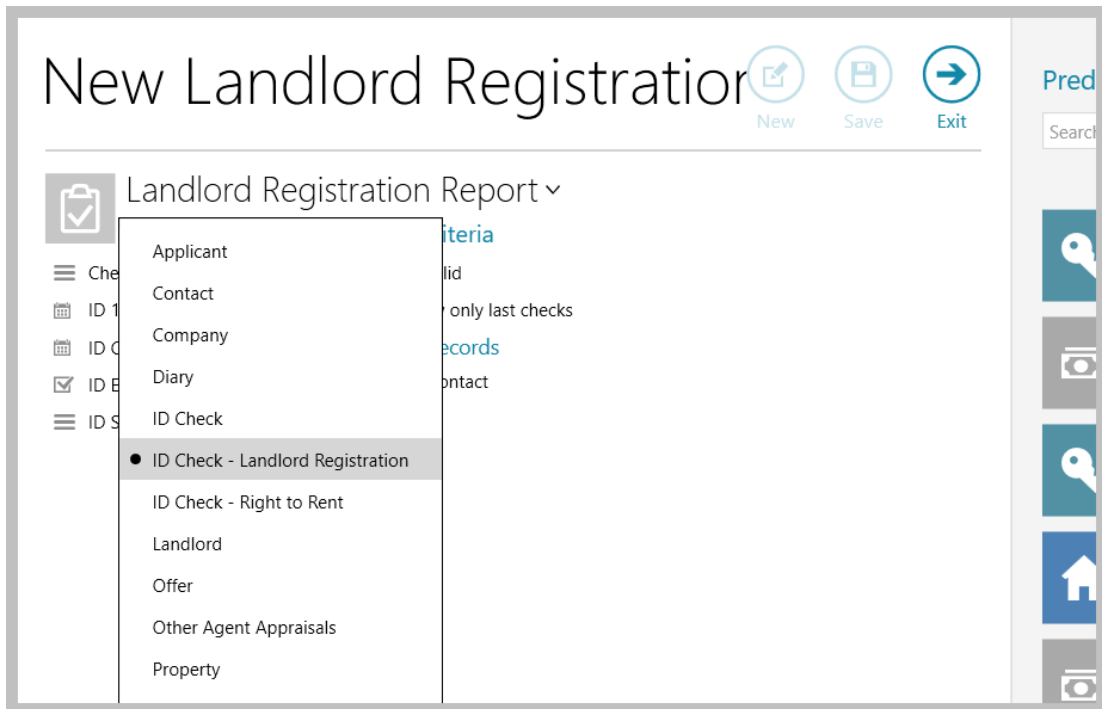
Some criteria options available via Right to Rent ID check reporting have no selectable option and will present code instead, as seen for the selected *ID Expiring* criteria option shown above

3. Landlord Registration check reports

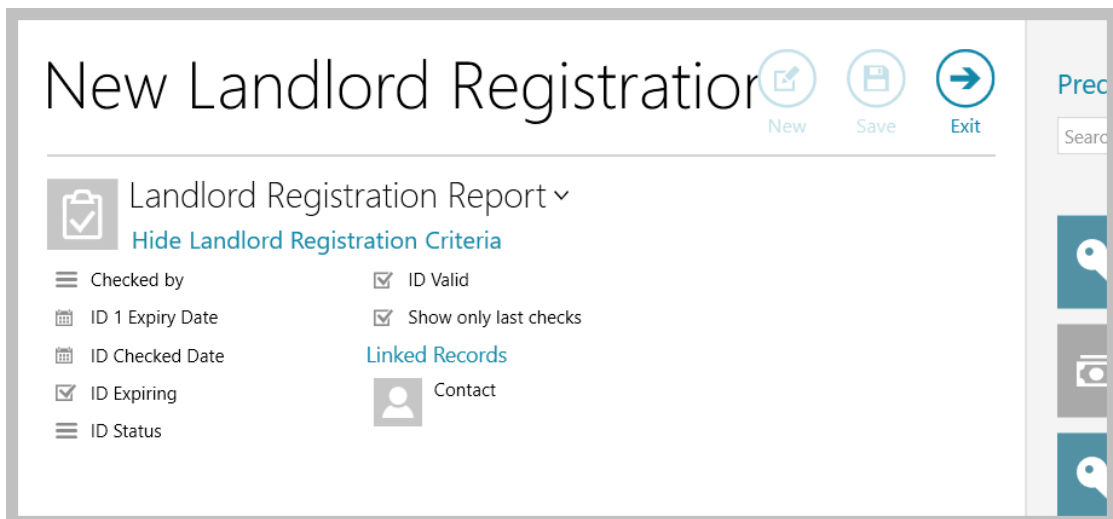
The option to report on Landlord Registration is only available when Landlord Registration ID check functionality is enabled
For more information on Landlord Registration functionality, see Knowledge Base article titled: **Logging Landlord Registration information (UK only)**

From main menu:

- Click **Reports** then **Power Reports** and select report type of **ID Check - Landlord Registration**



- The Landlord Registration Report criteria options will be shown



Landlord Registration Report criteria options include:

- **Checked by:** allows the report to be filtered by one/more users who carried out the check
- **ID 1 Expiry Date:** allows the report to be filtered by the expiry date of the Primary ID type entered for the Landlord Registration - options are available to report on expiry dates within a preset range or before/after a specific date
- **ID Checked Date:** allows the report to be filtered by the Landlord Registration check date - options are available to report on Landlord Registration check dates within a preset range or before/after a specific date
- **ID Expiring:** selecting this option filters the report to only show Landlord Registration checks that are flagged as expiring
When a Landlord Registration check is classed as 'expiring' is dependent on configuration settings - e.g. configuration could dictate that the Landlord Registration check is classed as 'expiring' when it is 30 days before its actual expiry date
- **ID Status:** select one/more overall Landlord Registration check status options to report on - options are: *Cancelled, Failed, In Progress, Successful, Unchecked*
- **ID Valid:** selecting this option filters the report to only show checks that are valid - i.e. a Landlord Registration check that has not expired and is not cancelled
- **Show only last checks:** when selected, will only show the latest Landlord Registration check for a contact - if not selected, all Landlord Registration checks will be shown for a contact
- **Linked Records** - allows **Contact** criteria to be added to the Right to Rent report

Example report

This report will return details of Landlord Registration checks where the expiry date is after 01/04/2024 and the ID check is valid

New Landlord Registration

New Save Exit

Landlord Registration Report ▼
[Pick Landlord Registration Criteria](#)

ID 1 Expiry Date	after ▼	01/04/2024 📅	×
ID Valid	Script: idCheck.status = 'Y' AND COALESCE(idCheck.id1Expire, '9999-12-31') > GETDATE()		×

Some criteria options available via Landlord Registration ID check reporting have no selectable option and will present code instead, as seen for the selected *ID Valid* criteria option shown above

4. Report results grid

After running any of the ID check reports covered in sections 1-3, the ID check report grid is displayed

- Double-click any entry in the list to view the contact's ID check screen (and contact record)

Grid functions can be used to sort or filter the list:

- To sort the list, click the column heading
- To filter the list, click to the right of the column heading to view filter icon and use the search field to filter by content
- Columns can be removed from the grid - right-click over the column headings and select **Pick columns** - columns can also be moved by clicking and dragging them to a new position
- After making changes to the grid layout, right-click over the column headings again and click **Save grid layout**
*If you have already saved the report criteria - to save to the default ID check report grid, select **Save as default layout** or, to save the grid just for this saved report, select **Save grid to report***

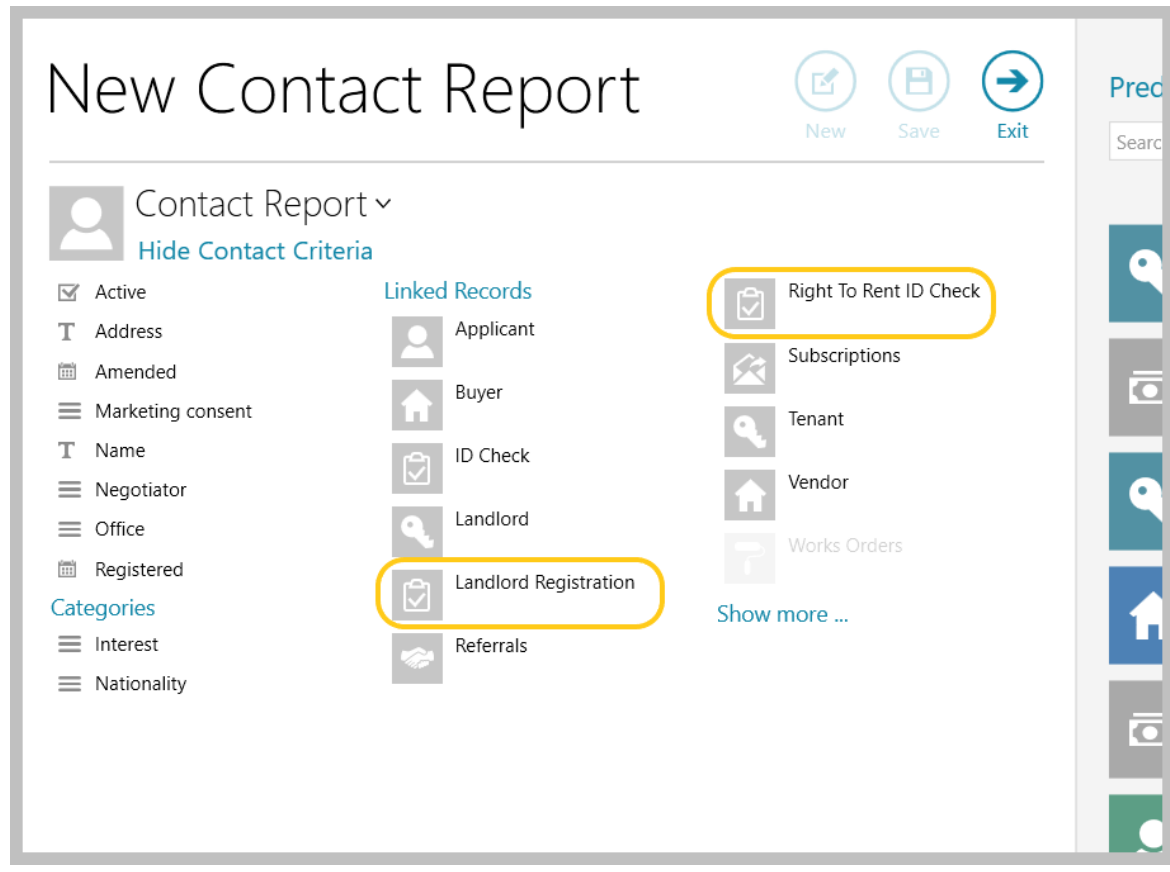
Status	Chk.Date	Chk.By	Pri.ID Type	Pri.Expiry	Pri.Detail	Sec.ID Type	Sec.Exp.	Sec.Detail	Cnt.Ref.	Contact	Phone
Successful	05/02/2024	Kian Kettlewell	*Passpo			GBR765 *Driving Licence	28/06/2030	SMITH806704SI9N	LON1400005	Mr K Alonso	m: 078965
Successful	07/02/2024	Kian Kettlewell	*Passpo						LON1400005	Miss A Terry	m: 078965
Successful	15/05/2023	Kian Kettlewell	*Passpo						LON2300002	Mr Jack Grainger	m: 07829 4
Successful	15/08/2022	Kian Kettlewell	*Passpo						LON1600001	Mr Gerald Down	m: 07700 9
Successful	18/10/2023	Kian Kettlewell	*Passpo						LON1600001	Miss Maggie Coll	m: 07700 9
Successful	03/08/2023	Kian Kettlewell	*Passpo						LON2300001	Mr Mark Young	m: 07926 9
Successful	03/08/2023	Kian Kettlewell	*Passpo						LON2300001	Mr Paul Harrison	m: 07933 1
Successful	20/01/2023	Kian Kettlewell	*Passpo						LON2300000	Miss Bella Carsor	m: 07924 6
Successful	24/08/2023	Kian Kettlewell	*Passpo						LON2300002	Miss Emma Hutcl	m: 07895 7
Successful	09/02/2023	Kian Kettlewell	*Passport	19/10/2028					LON2300000	Oscar Green Join	b: 020 798
Successful	21/09/2022	Kian Kettlewell	*Passport	09/09/2028					LON2000001	Mrs Wendy Jone	m: 07979 9
Successful	27/01/2023	Kian Kettlewell	*Passport	03/09/2028					LON2200000	Johnson & Johns	b: 020 736
Successful	18/10/2023	Kian Kettlewell	*Passport	23/07/2027					LON2300003	Mrs Fran Young	m: 07345 9
Successful	11/08/2022	Kian Kettlewell	*Passport	20/02/2026					LON1500000	Mr Ethan Davies	m: 070031
Successful	24/10/2023	Kian Kettlewell	*Passport	02/08/2025					LON2300003	Mr Tom Bowers	m: 07925 6
Successful	04/11/2022	Kian Kettlewell	*Passport	05/05/2025					LON2200000	Mr Sam King	m: 07928 9
Successful	24/11/2022	Kian Kettlewell	*Passport	21/03/2025					LON1500001	Mr Liam Jones	e: liamjone
Successful	06/02/2024	Kian Kettlewell	*Passport		1234567898				LON1600000	Miss Sophie Dev	h: 020 794
Successful	06/02/2018	Kian Kettlewell	*Passport						LON1500007	Mr Max Atkinson	m: 077865
Successful	24/11/2022	Kian Kettlewell	*Passport			*Driving Licence			LON2000000	Mrs Helen Johns	m: 07919 9
Successful	05/02/2024	Kian Kettlewell	*Passport		123456				LON1500007	Mrs Helen Parr	m: 077654
Successful	09/02/2024	Kian Kettlewell	*Passport		1234569871GBR369				LON1400004	Mr J Tizzard	m: 07825 5

5. Use RTR / Landlord Registration criteria when running a contact report

Right to Rent and Landlord Registration report criteria can be added as a linked record/sub-report within a contact report

This is in addition to being able to add ID Check criteria to a contact report, which was available prior to version 12.181

This enhancement allows a report to be run on contacts dependent on selected RTR/Landlord Registration check information



The ability to add an ID check report to an Organiser panel will be available in a future release

Generate EPC graph using EPC figures from third party app (via API)

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

EPC figures available via a third party app can be used to create an EPC graph image for use when marketing

Both residential and commercial EPC data can be retrieved

This functionality allows EPC figures to be retrieved quickly and easily

1. Retrieve EPC option

From property record:

- Click **EPC**

Mackay House, 170 Church Road, Hove, BN3 2DJ - Registered 03/11/2021 - MKT2105

Match | Journal | Offers (3) | Viewings and Keys

Mackay House
170 Church Road
Hove
BN3 2DJ United Kingdom
Area Select ...

Vendor Mr A Mishon
Mobile 07777 789456
Home Add ...

Next call 02/04/2024 set

Relationships
Main Office Camberwell
Key Contact Frank Manning

Active Sales
Status For Sale - Available
Agency Sole Agent Sub agents
Disposal Private Treaty

Pre-Instruction Checks | AI Descriptions | Marketing

Guide Price £650,000
Commission 1.75 %

Attributes
• 4 Bedroom(s) • Garden
• 2 Reception Room(s) • Off Street Parking
• 2 Bathroom(s) • Period
• House • Village
• Detached

EPC Rooms

Activity Feed
Type to filter activity
Offer on Mackay House, Amount from £850,000 t 06/03/2024 by Frank Ma
Offer on Mackay House, from £50 to £55,000 06/03/2024 by Frank Ma
Offer on Mackay House, Amount from £800,000 t 06/03/2024 by Frank Ma
New offer of £850,000 d Mrs Trang Test 1 (applica 29/02/2024 by Frank Ma
29/02/2024 9:00 AM - Ap 29/02/2024 by Frank Ma
28/02/2024 7:00 AM - Vi

Notes Enter general note

Referrals / Leads

- Click **Retrieve EPC**

EPC

Make Graph | View Graph | Add Certificate | Retrieve EPC

EPC EPC Exempt

Energy Efficiency Rating 0 - Potential 0 - Created / /

Environment Impact Rating 0 - Potential 0 -

First Page URL

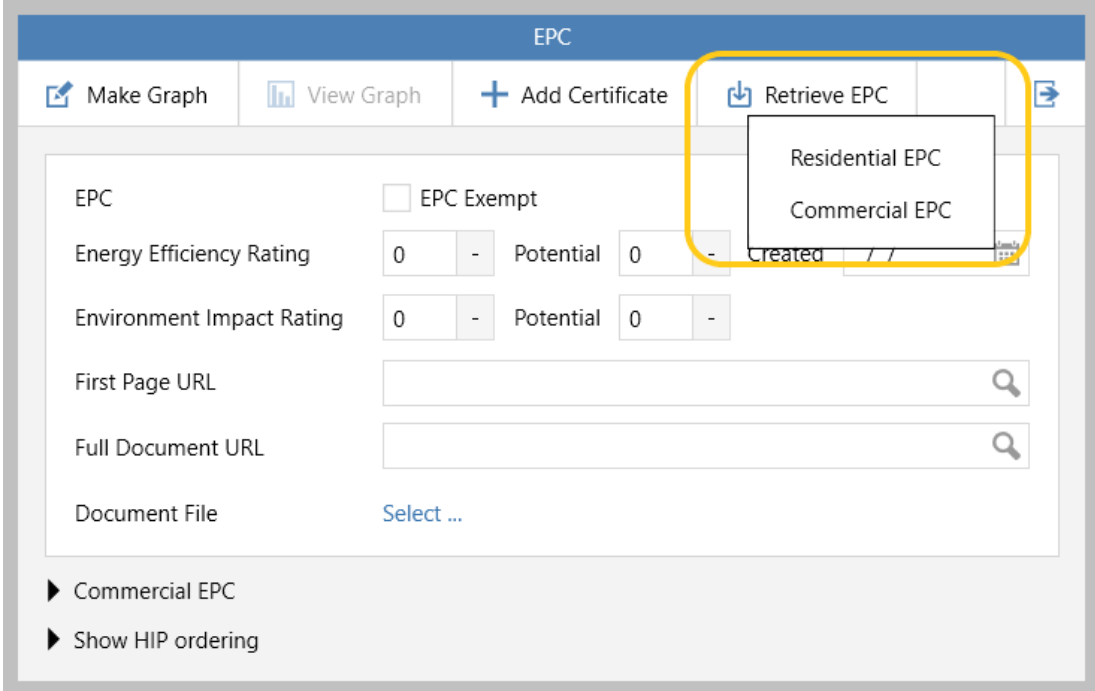
Full Document URL

Document File Select ...

Show HIP ordering

If you have commercial EPC functionality enabled, then the option to generate a residential or commercial EPC is offered:

- Click **Retrieve EPC** and select **Residential EPC** or **Commercial EPC**, as required



The screenshot displays the EPC software interface. At the top, there is a blue header with the text "EPC". Below the header is a navigation bar with several buttons: "Make Graph", "View Graph", "Add Certificate", "Retrieve EPC", and a right-pointing arrow. The "Retrieve EPC" button is highlighted with a yellow border, and a dropdown menu is open, showing two options: "Residential EPC" and "Commercial EPC".

The main content area contains the following fields and controls:

- EPC**: EPC Exempt
- Energy Efficiency Rating**: 0 - Potential 0 - Created / /
- Environment Impact Rating**: 0 - Potential 0 -
- First Page URL**:
- Full Document URL**:
- Document File**: [Select ...](#)

At the bottom of the interface, there are two expandable sections:

- ▶ Commercial EPC
- ▶ Show HIP ordering

2. Select property

The property postcode is used and a list of matches with EPC data presented
The **Created Date** indicates when the EPC was created for each property

- Select the required property, ensure that **Make Graph** remains ticked so that an EPC image is generated, then click **Select**
When the **Make Graph** option is ticked, the EPC image is created and automatically added to the property pictures screen

Retrieve Residential EPC ✕

The Energy Performance Certificate (EPC) ratings shown are the latest ratings submitted to the government's Department for Levelling Up, Housing & Communities.

Created Date	Postcode	Address
05/01/2024	BN3 2DJ	Flat 2, 190 Church Road
20/06/2023	BN3 2DJ	Flat 4, 176 Church Road
09/02/2023	BN3 2DJ	Flat 1, 198a Church Road
17/11/2022	BN3 2DJ	Flat 5, 192 Church Road
11/03/2022	BN3 2DJ	Flat 2, 194a Church Road
11/01/2022	BN3 2DJ	Flat 3, 194 Church Road
09/12/2021	BN3 2DJ	Flat 6, 192 Church Road

Make Graph

[Select](#)

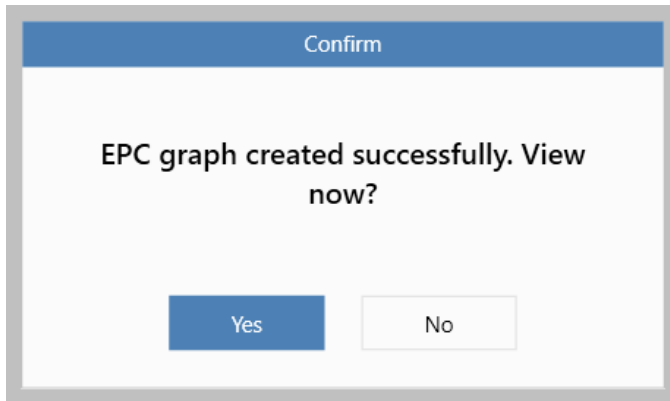
- Any values already entered into the EPC screen will be overwritten with the EPC rating figures and creation date - click **Yes**

Confirm

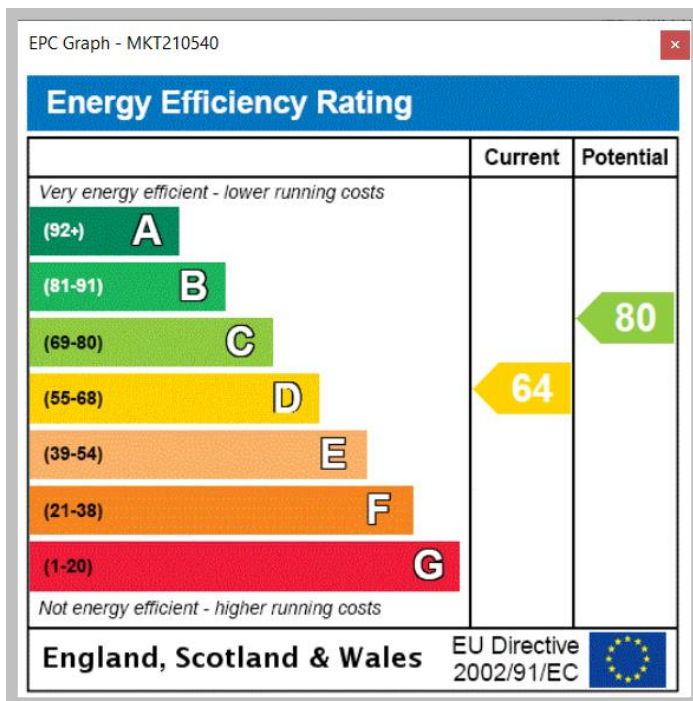
Are you sure you want to overwrite the data with values from the API and auto generate EPC Graph?

[Yes](#) [No](#)

- Click **Yes** if you want to check the graph



- If you chose to display the graph - it is shown, displaying the relevant ratings retrieved from the API



- The four **EPC Rating** figures and **Created** date are added to the EPC screen on the property

The screenshot shows the 'EPC' form interface. At the top, there are navigation buttons: 'Make Graph', 'View Graph', 'Add Certificate', 'Retrieve EPC', and a refresh icon. Below these is a section for 'EPC' with an 'EPC Exempt' checkbox. The main form area contains several input fields: 'Energy Efficiency Rating' (64, D, Potential 80, C, Created 08/05/2019), 'Environment Impact Rating' (57, D, Potential 80, C), 'First Page URL', 'Full Document URL', and 'Document File' (with a 'Select ...' button). A 'Show HIP ordering' button is at the bottom left. A yellow box highlights the 'Energy Efficiency Rating' and 'Environment Impact Rating' rows.

- For a commercial EPC, the **EPC Rating** and **EPC Created** date is added

The screenshot shows the 'EPC' form interface for a commercial property. It has the same top navigation buttons as the residential form. The main form area includes 'EPC' with an 'EPC Exempt' checkbox, 'Energy Efficiency Rating' (0, -, Potential 0, -, Created //), and 'Environment Impact Rating' (0, -, Potential 0, -). Below these are 'First Page URL', 'Full Document URL', and 'Document File' (with a 'Select ...' button). A new section titled 'Commercial EPC' is expanded, containing 'Commercial EPC' with an 'EPC Exempt' checkbox, 'EPC Rating' (75, C), 'EPC Created date' (16/08/2022), 'URL to the EPC', and 'Document File' (with a 'Select ...' button). A 'Show HIP ordering' button is at the bottom left. A yellow box highlights the 'Commercial EPC' section.

Ground rent review frequency can be added to a sales property

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

To comply with Trading Standards guidance as to what information must be displayed online for property listings in relation to Material Information Part A, a sales property's ground rent frequency can be added

This is in addition to being able to add the ground rent amount (per annum), its review date, increase percentage figure and related notes, which were already available in previous releases

In order for this information to be uploaded to a property portal, further updates will be required on the relevant portal feeds (current timescale to be confirmed)

1. Access property attributes

From sales property:

- In **Attributes** panel, click **edit** (pencil) icon

The screenshot shows the 'Attributes' panel for a property. The property details include: 76 Sloane Court East, London, SW3 4TQ, South West London. The vendor is Mr T Myles, with email tim@myles.com. The next call is set for 29/12/2023. The property is active for sale, with a guide price of £3,900,000 and a commission of 2%. The attributes list includes: 2 Total Bedrooms, 1 Reception Room, 1 Bathroom, 1706 Square Feet, Leasehold, Ground rent £150 pa, and Price per sq ft: £2,286. The 'Attributes' panel is highlighted with a yellow circle around the edit icon.

- **Ground Rent Review Frequency** (in years) can be added

The screenshot shows the 'Charges' section of the 'Attributes' panel. The fields are: Service Charge (per annum) £, Service Charge Review Date //, Service Charge Note, Ground Rent (per annum) £150.00, Ground Rent Review Date 10/05/2026 (Due in 2 years 1 month 13 days), Ground Rent Review Frequency 3 years, Ground Rent Increase 2.5%, and Ground Rent Note.

For more information the ground rent fields, see Knowledge Base section titled: **Service charge & ground rent**

Property attribute screen update to allow utilities & additional property information to be logged

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

To comply with Trading Standards guidance as to what information must be displayed online for property listings in relation to Material Information Parts B & C, a new tab has been added to property attributes titled *Utilities & Additional Information* - this new tab allows the required information to be logged consistently

For lettings properties, some of this information could already be logged prior to version 12.181, such as utility providers, meter point numbers and heating type - therefore this information has been transferred from the *Appliances, Insurance & Safety* tab to the new *Utilities & Additional Information* tab

In order for the required information to be uploaded to a property portal, further updates will be required on the relevant portal feeds (current timescale to be confirmed)

1. Access new Utilities & Additional Information tab

From property (sales or lettings):

- In **Attributes** panel, click **edit** (pencil) icon

The screenshot shows the 'Attributes' panel for a property. The 'Attributes' section is highlighted with a yellow circle around the edit (pencil) icon. The panel includes sections for 'Pre-Instruction Checks', 'Marketing', 'Rent/Fee Details', and 'Attributes'.

Attributes
• 2 Total Bedrooms
• 2 Double Bedrooms
• 1 Reception Room
• 2 Bathrooms
• Double Garage
• Communal Gardens
• Period
• First Floor
• Town/City

- Click **Utilities & Additional Information** tab and complete as required

The screenshot shows the 'Utilities & Additional Information' tab. The 'Utilities & Additional Information' tab is highlighted with a yellow circle. The interface shows a table of utilities and various checkboxes for accessibility, rights, and flood risk.

Utilities	Type	Supplier	Meter Point
Electricity	Mains Supply	British Gas, Head Office	S 01 458 369
Water	Mains Supply	South West Water, Lo...	S 01 895 247
Heating	Air Conditioning	British Gas, Head Office	S 02 741 101
	Central		
	Double Glazing		
	Eco-Friendly		
	Electric		
	Gas		
	Gas Central		
	Night Storage		
	Oil		
	Solar		
	Solar Water		
	Under Floor		
	Wood Burner		
	Open Fire		
	Biomass Boiler		
	Ground Source Heat Pump		
	Air Source Heat Pump		
	Solar Photovoltaic Thermal		
	Underfloor Heating		
	Solar Thermal		
Broadband	None	Virgin Media	
	ADSL		
	FTTC		
	FTTP		
Telephone		Virgin Media	
Cable TV		Virgin Media	
Sewerage	Mains Supply	Main Heating	Independent CHW

For lettings properties: utility suppliers, meter point numbers and mains heating type was previously stored on the *Appliances, Insurance & Safety* tab - where this information had previously been entered prior to version 12.181, it will now be shown on the new *Utilities & Additional Information* tab instead

2. Appliances, Insurance & Safety tab

For lettings properties, the following information is no longer stored on the *Appliances, Insurance & Safety* tab:

- utility suppliers
- meter point numbers
- mains heating type

Attributes ✕

General ▾ Attributes Appliances, Insurance & Safety Licensing Utilities & Additional Information

🔦 **Appliances** +

Description	Quantity	Make	Model	Serial	Bought
Boiler	1			987654321GST	20/10/2021
Dishwasher	1			HJ78945LKMJ	14/06/2022
Fridge	1			RTS7892514PL	14/06/2022
Freezer	1			SWE123456789	14/06/2022

🔗 **Safety Checks, Certificates, Insurance & Warranties** Current Certificates Only Certificate Responsibility ⊞ +

Type	Start Date	End Date	Policy Number	Supplier	Certificate Managed By	Comple
Gas Safety	24/02/2023	23/02/2024	987654321	Safe Gas & Electric	Not Set	No
Electrical Safety	24/02/2023	23/02/2024	123456789	Safe Gas & Electric	Not Set	No

Exceptions No gas No electrical certificate warning

Where utility suppliers, meter point numbers and mains heating type information had previously been entered on a lettings property, the information will be shown on the *Utilities & Additional Information* tab instead

Accounts*

Enhancements to unallocated tenant receipts screen - including adding notes to receipts

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

The unallocated tenant receipts screen has been enhanced, you can now:

- Easily distinguish between receipts and invoices
- Easily expand/collapse each section
- Add notes to receipts - where configuration is enabled

Each enhancement is covered in detail below

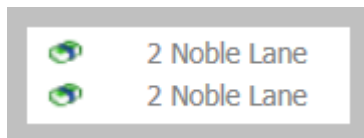
1. Easily distinguish between receipts and invoices

From Lettings/Rentals on main menu:

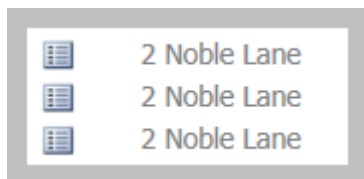
- Click **Daily Accounts** processes and select **Unallocated Tenant Receipts**
- Beside the property address, click the **+** icon to expand the section

Property	Pending Receipts	Received	Invoices	Future R	Outstanding	Auto allocate	Allo
St. Saviourgate, Yorks	£400.00	02/05/2018	0	0		<input type="checkbox"/>	<input type="checkbox"/>
St. Saviourgate, Yorks	£400.00		0	0		<input type="checkbox"/>	<input type="checkbox"/>
2 Noble Lane	£1,225.00	06/12/2019	5	0	£349.20	<input type="checkbox"/>	<input type="checkbox"/>
2 Noble Lane			1	0	£1.20		
2 Noble Lane			1	0	£14.40		
2 Noble Lane			1	0	£66.00		
2 Noble Lane			1	0	£120.00		
2 Noble Lane			1	0	£147.60		
2 Noble Lane	£475.00		0	0			<input type="checkbox"/>
2 Noble Lane	£750.00		0	0			<input type="checkbox"/>
Unknown	£500.00	20/01/2022	0	1		<input type="checkbox"/>	<input type="checkbox"/>
Unknown			0	1	£5,000.00		
Unknown	£500.00		0	0			

- Receipts are shown with a green bank note icon



- Invoices are shown with a white note icon

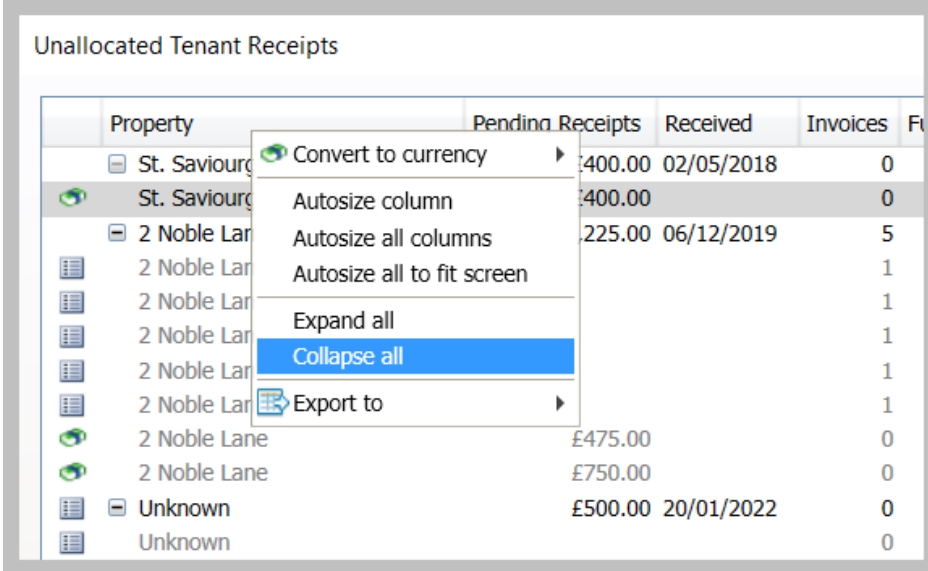


2. Easily expand/collapse each section

All sections within the Unallocated Tenant Receipts screen can be expanded or collapsed via a shortcut menu

From Unallocated Tenant Receipts screen, as shown in section 1:

- Right-click over the grid headings for options to **Expand all** and **Collapse all**



The screenshot shows the 'Unallocated Tenant Receipts' screen with a table and a context menu. The table has columns for Property, Pending Receipts, Received, Invoices, and Fees. The context menu is open over the 'Pending Receipts' column, showing options like 'Convert to currency', 'Autosize column', 'Expand all', and 'Collapse all'.

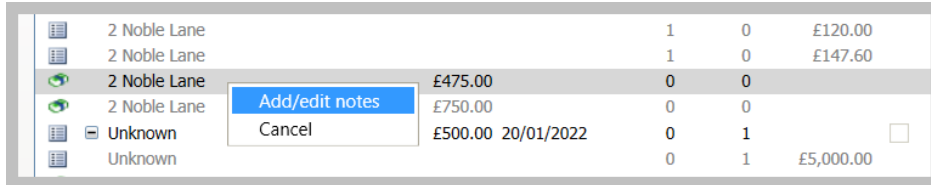
Property	Pending Receipts	Received	Invoices	Fees
St. Saviour	400.00	02/05/2018	0	
St. Saviour	400.00		0	
2 Noble Lane	225.00	06/12/2019	5	
2 Noble Lane			1	
2 Noble Lane			1	
2 Noble Lane			1	
2 Noble Lane			1	
2 Noble Lane			1	
2 Noble Lane	£475.00		0	
2 Noble Lane	£750.00		0	
Unknown	£500.00	20/01/2022	0	
Unknown			0	

3. Add notes to receipts

Where configured, notes can be added to receipts (see configuration information at the top of this article)

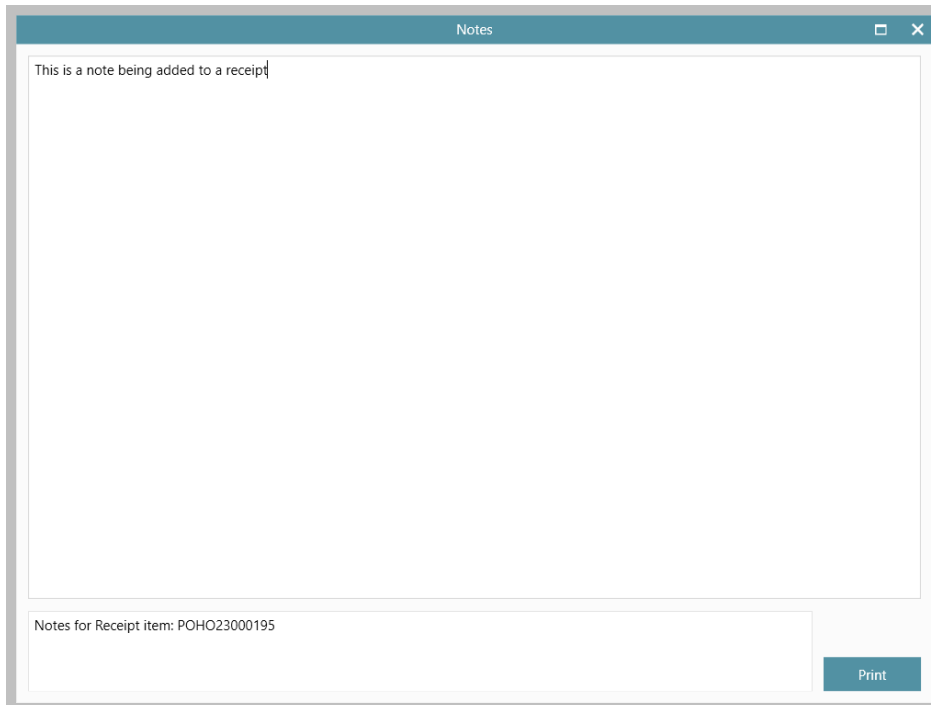
From Unallocated Tenant Receipts screen, as shown in section 1:

- Right-click over a receipt and select **Add/edit notes**
This option is only available for receipts (not invoices)



2 Noble Lane	1	0	£120.00		
2 Noble Lane	1	0	£147.60		
2 Noble Lane	£475.00	0	0		
2 Noble Lane	£750.00	0	0		
Unknown	£500.00	20/01/2022	0	1	<input type="checkbox"/>
Unknown	0	1	£5,000.00		

- Add the receipt note and click the cross icon (top right) to close the window



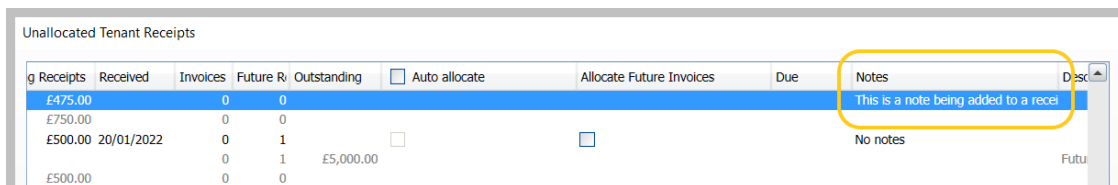
Notes

This is a note being added to a receipt

Notes for Receipt item: POHO23000195

Print

- The note will be displayed in the **Notes** column (seen when scrolling across to the right)



g Receipts	Received	Invoices	Future R	Outstanding	<input type="checkbox"/> Auto allocate	Allocate Future Invoices	Due	Notes	Desc
£475.00		0	0					This is a note being added to a receipt	
£750.00		0	0						
£500.00	20/01/2022	0	1		<input type="checkbox"/>	<input type="checkbox"/>		No notes	
		0	1	£5,000.00					
£500.00		0	0						

- The note can be edited or removed by right-clicking over the receipt and select **Add/edit notes** again

Add, edit & save tenancy fees on initial tenant invoice without posting it

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

This functionality is available by default to users of Reapit client accounts, but can be disabled
To request this option to be disabled for one/more users, contact Reapit Support

Tenancy fees can be added and saved to an invoice without needing to post it - this is particularly useful for the initial tenant invoice, allowing you to add tenancy fees before the invoice needs to be posted

From the tenant invoice screen:

- Click **Add item**

Create Tenant Invoice

Invoice Number Date Create Postings

Fees and Charges

Include	Amount	VAT	Charge	Description
<input type="checkbox"/>	£0.00	£0.00	Tenant	Deposit invoice
<input checked="" type="checkbox"/>	£150.00	£30.00	Landlord	Tenancy Agreement Fee Options

Rent Payment Schedule Display VAT Inclusive

Include	Rent	Fees - Letting	Management	Payable	Rental Period
<input checked="" type="checkbox"/>	£710.77	£56.86	+ £49.75	- £0.00	11/03/2024 to 24/03/2024 Info
<input checked="" type="checkbox"/>	£4,620.00	£369.60	+ £323.40	- £0.00	25/03/2024 to 23/06/2024 Info
<input type="checkbox"/>	£4,709.07	£376.73	+ £329.63	- £0.00	24/06/2024 to 28/09/2024 Info
<input type="checkbox"/>	£5,100.00	£408.00	+ £357.00	- £0.00	29/09/2024 to 24/12/2024 Info
<input type="checkbox"/>	£4,302.31	£344.18	+ £301.16	- £0.00	25/12/2024 to 10/03/2025 Info
Total	£19,442.15	£1,555.37	£1,360.94	£0.00	
Av. Fee		8%	7%	0%	

- Add the **Amount** and **Description** as required and click the cross (top right) to close the screen
Changes can also be made to existing Fees and Charges

Create Tenant Invoice

Invoice Number Date Create Postings

Fees and Charges

Include	Amount	VAT	Charge	Description
<input type="checkbox"/>	£0.00	£0.00	Tenant	Deposit invoice
<input checked="" type="checkbox"/>	£150.00	£30.00	Landlord	Tenancy Agreement Fee Options
<input checked="" type="checkbox"/>	£10.00	£2.00	Tenant	Credit Card Surcharge Options

Rent Payment Schedule Display VAT Inclusive

Include	Rent	Fees - Letting	Management	Payable	Rental Period
<input checked="" type="checkbox"/>	£710.77	£56.86	+ £49.75	- £0.00	11/03/2024 to 24/03/2024 Info
<input checked="" type="checkbox"/>	£4,620.00	£369.60	+ £323.40	- £0.00	25/03/2024 to 23/06/2024 Info

- A prompt to save the fees and charges will be displayed, click **Yes**

Create Tenant Invoice

Invoice Number Date [Create Postings](#) [Print Invoice](#)

Fees and Charges [Add Item ...](#)

Include	Amount	VAT	Charge	Description
<input type="checkbox"/>	<input type="text" value="£0.00"/>	<input type="text" value="£0.00"/>	<input type="text" value=""/>	<input type="text" value=""/>
<input checked="" type="checkbox"/>	<input type="text" value="£150.00"/>	<input type="text" value="£3.00"/>	<input type="text" value=""/>	<input type="text" value=""/>
<input checked="" type="checkbox"/>	<input type="text" value="£10.00"/>	<input type="text" value="£2.00"/>	<input type="text" value=""/>	<input type="text" value=""/>

Rent Payment Schedule

Include	Rent	Fee	Charge	Description	Start	End	Info
<input checked="" type="checkbox"/>	<input type="text" value="£710.77"/>	<input type="text" value="£5.00"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="24/03/2024"/>	<input type="text" value="24/03/2024"/>	Info
<input checked="" type="checkbox"/>	<input type="text" value="£4,620.00"/>	<input type="text" value="£3.00"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="23/06/2024"/>	<input type="text" value="23/06/2024"/>	Info
<input type="checkbox"/>	<input type="text" value="£4,709.07"/>	<input type="text" value="£3.00"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="28/09/2024"/>	<input type="text" value="28/09/2024"/>	Info
<input type="checkbox"/>	<input type="text" value="£5,100.00"/>	<input type="text" value="£408.00"/>	<input type="text" value="£357.00"/>	<input type="text" value="£0.00"/>	<input type="text" value="29/09/2024"/>	<input type="text" value="24/12/2024"/>	Info
<input type="checkbox"/>	<input type="text" value="£4,302.31"/>	<input type="text" value="£344.18"/>	<input type="text" value="£301.16"/>	<input type="text" value="£0.00"/>	<input type="text" value="25/12/2024"/>	<input type="text" value="10/03/2025"/>	Info
Total	£19,442.15	£1,555.37	£1,360.94	£0.00			
Av. Fee		8%	7%	0%			

Save

Save Fees & Charges ?

Before posting the invoice, changes can be made to the fees and charges, plus new ones added by repeating the process outlined above

Goodwill payment credit included in the tenancy income report

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

Tenancy income report functionality is a configurable option for Enterprise customers
To request this report to be enabled on your system, contact Reapit Support

When running a *Tenancy Income & Forecast* report, goodwill payment credits are now shown

Including this information provides a more full indication of all payments against tenancies

1. Choose report criteria

From the main menu:

- Click **Reports** then select **MI Analysis** and click **Tenancy Income Report**
- Select the report type of **Tenancy Income & Forecast**, add required criteria and click **Report**

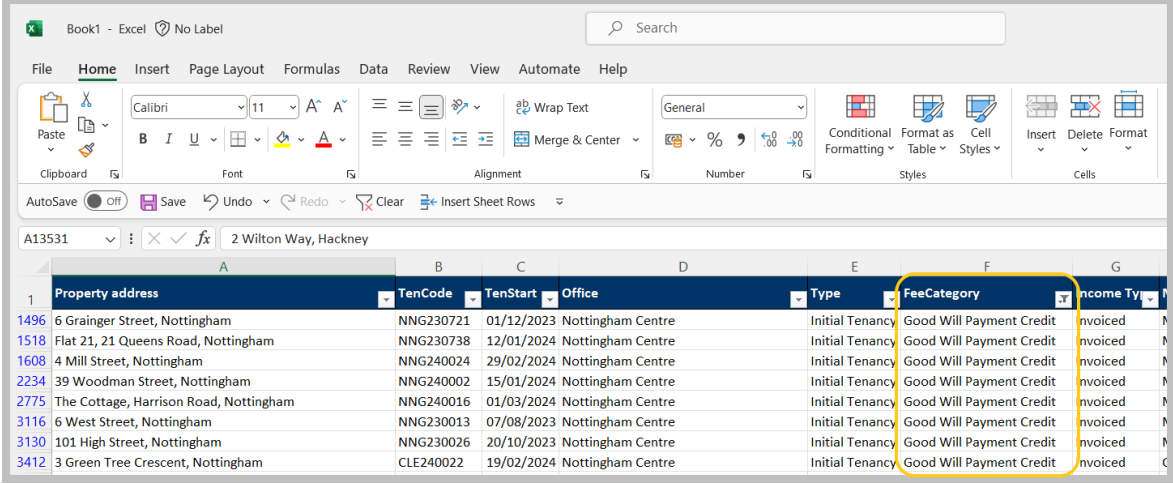
The screenshot shows a configuration window titled "Tenancy Income Reporting" with a close button (X) in the top right corner. The window is divided into several sections for configuring the report. The "Report Type" section has two radio buttons: "Fees & Commission" (unselected) and "Tenancy Income & Forecast" (selected and highlighted with a yellow circle). The "Output Options" section contains four checkboxes: "Include renewal & alteration breakdowns" (unchecked), "Include landlord fees with no associated tenancy" (checked), "Show individual negotiator commission allocations" (unchecked), and "Show individual office commission allocations" (unchecked). Below this, there are several rows of configuration options, each with a checkbox and a date picker or dropdown menu: "Tenancy Start" (unchecked, date picker // to //, Select ...), "Income Period" (checked, date picker 01/01/2024 to 31/12/2024, Select ...), "Status" (checked, dropdown menu containing "Tenancy Current, Arranging Tenancy", Select one or more status ...), "Property Office" (unchecked, empty dropdown, Select one or more office ...), "Neg. Allocation" (unchecked, empty dropdown, Select negotiator/manager ...), "Office Allocation" (unchecked, empty dropdown, Select one or more fee office ...), and "Renewal & Alteration" (unchecked, date picker // to //, Select ...). A blue "Report" button is located at the bottom right of the window.

For more information on using the tenancy income report, see Knowledge Base section titled: **Tenancy income report - configuration option**

2. Goodwill payment credit information

The report will open in Microsoft Excel

- Click the **Income Report** tab
- The **FeeCategory** column will now show a **Good Will Payment Credit** category as well as other categories such as Letting Fee, Management Fee, Additional Agent Fee etc.



The screenshot shows the Microsoft Excel interface with a table containing property data. The 'FeeCategory' column is highlighted with a yellow box, indicating that all entries in this column are 'Good Will Payment Credit'.

	A	B	C	D	E	F	G
1	Property address	TenCode	TenStart	Office	Type	FeeCategory	Income Ty
1496	6 Grainger Street, Nottingham	NNG230721	01/12/2023	Nottingham Centre	Initial Tenancy	Good Will Payment Credit	invoiced
1518	Flat 21, 21 Queens Road, Nottingham	NNG230738	12/01/2024	Nottingham Centre	Initial Tenancy	Good Will Payment Credit	invoiced
1608	4 Mill Street, Nottingham	NNG240024	29/02/2024	Nottingham Centre	Initial Tenancy	Good Will Payment Credit	invoiced
2234	39 Woodman Street, Nottingham	NNG240002	15/01/2024	Nottingham Centre	Initial Tenancy	Good Will Payment Credit	invoiced
2775	The Cottage, Harrison Road, Nottingham	NNG240016	01/03/2024	Nottingham Centre	Initial Tenancy	Good Will Payment Credit	invoiced
3116	6 West Street, Nottingham	NNG230013	07/08/2023	Nottingham Centre	Initial Tenancy	Good Will Payment Credit	invoiced
3130	101 High Street, Nottingham	NNG230026	20/10/2023	Nottingham Centre	Initial Tenancy	Good Will Payment Credit	invoiced
3412	3 Green Tree Crescent, Nottingham	CLE240022	19/02/2024	Nottingham Centre	Initial Tenancy	Good Will Payment Credit	invoiced