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

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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

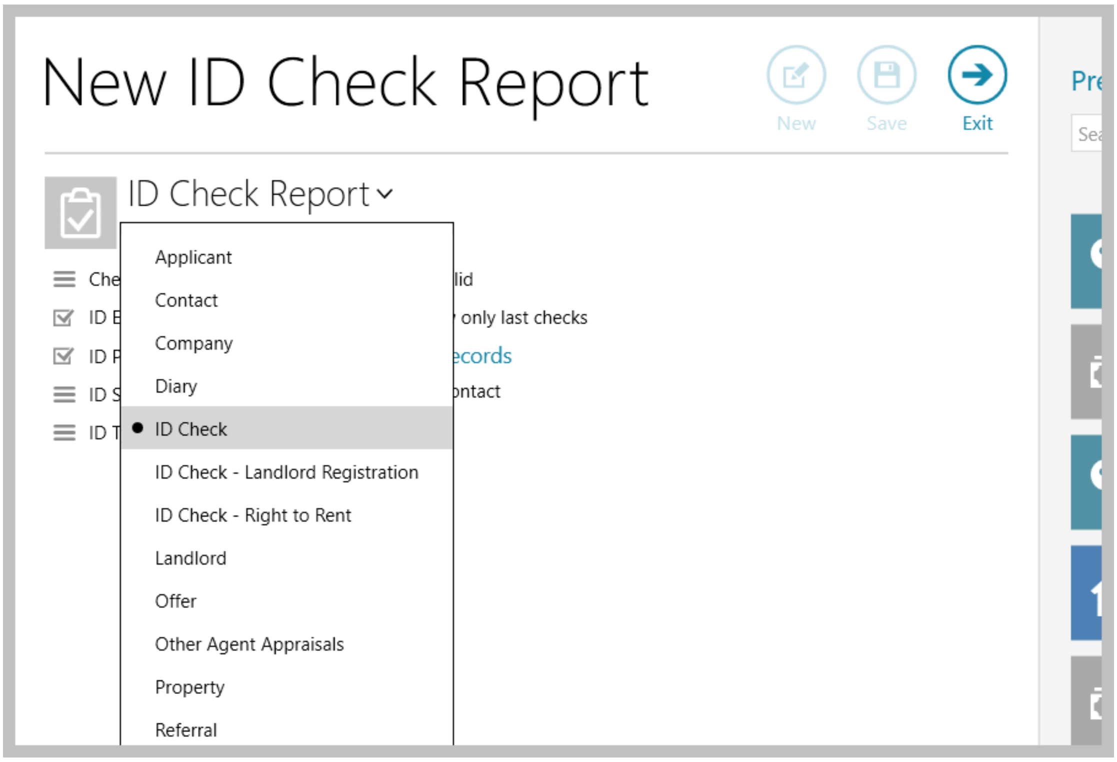
From version 12.181, ID check reports are created as a report type with enhanced criteria options available

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

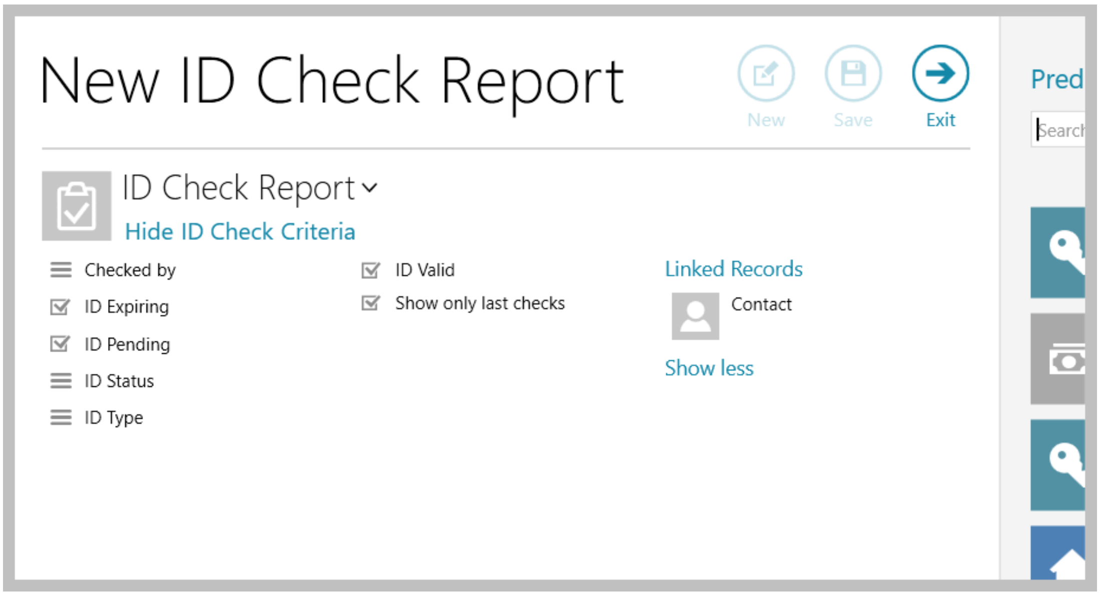
For more information on adding ID check information, see Knowledge Base article titled: **Enter & report on ID**

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

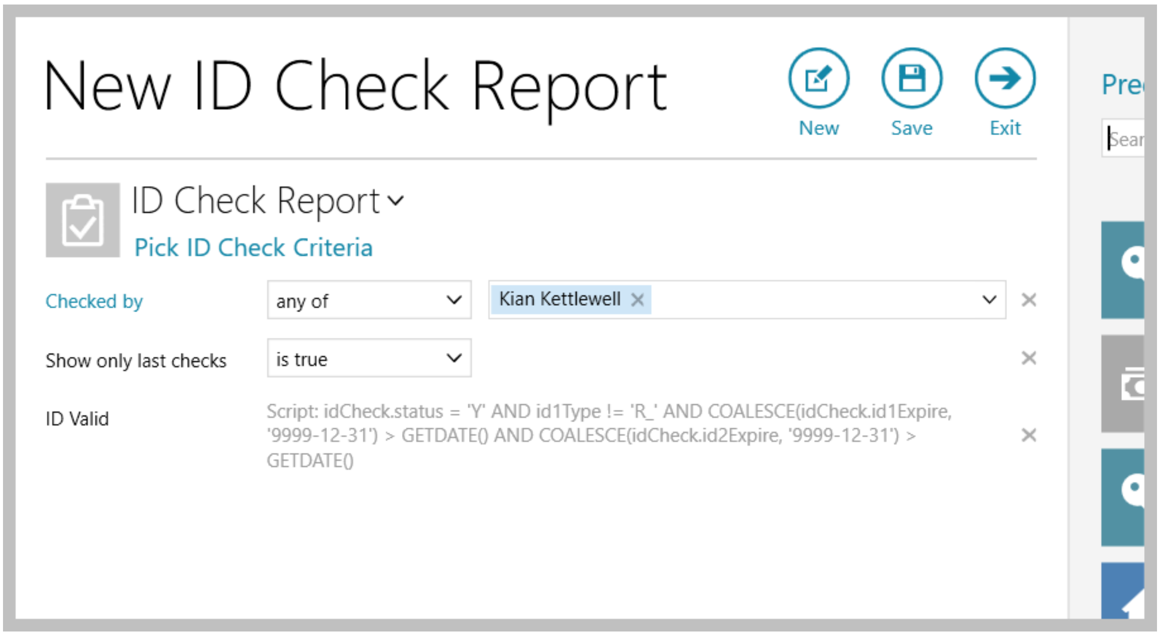
- **ID Warning:** *not shown above - this is an extra status option available with custom configuration for ID, typically when using Lexis Nexis*
  When enabled, this criteria option allows you to filter the report by warning status

- **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



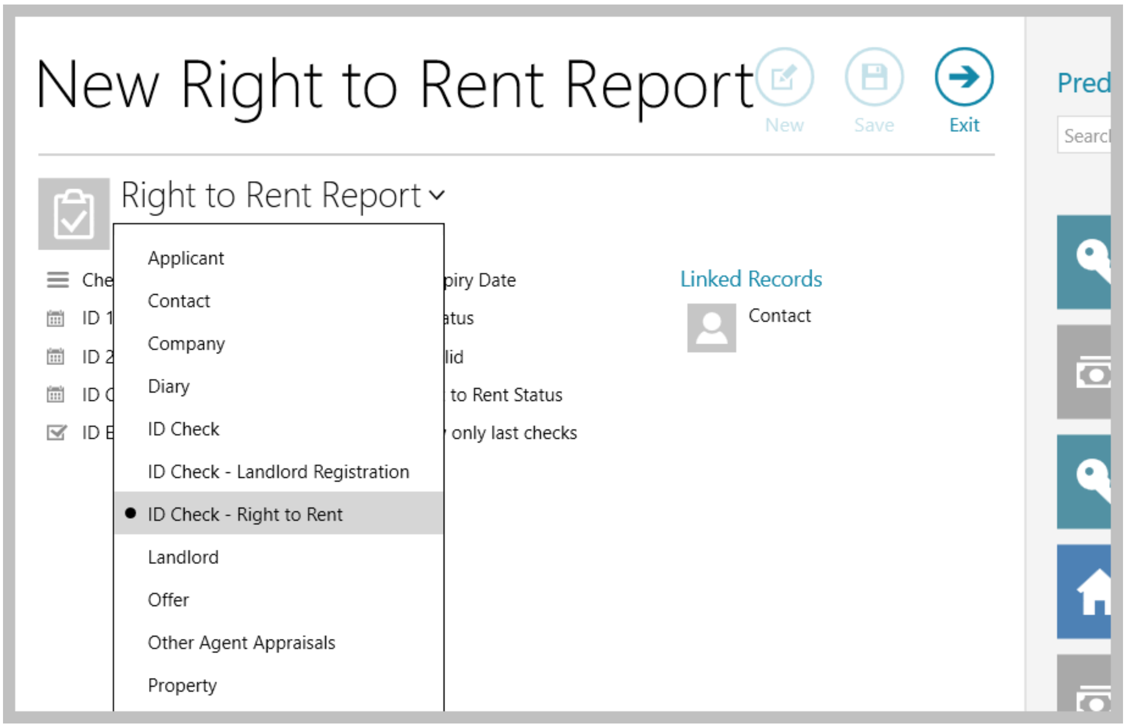
Some criteria options available via ID check reporting have no selectable option and will present code instead, as seen for the selected *ID Valid* criteria option shown above

2. Right to Rent (RTR) check reports

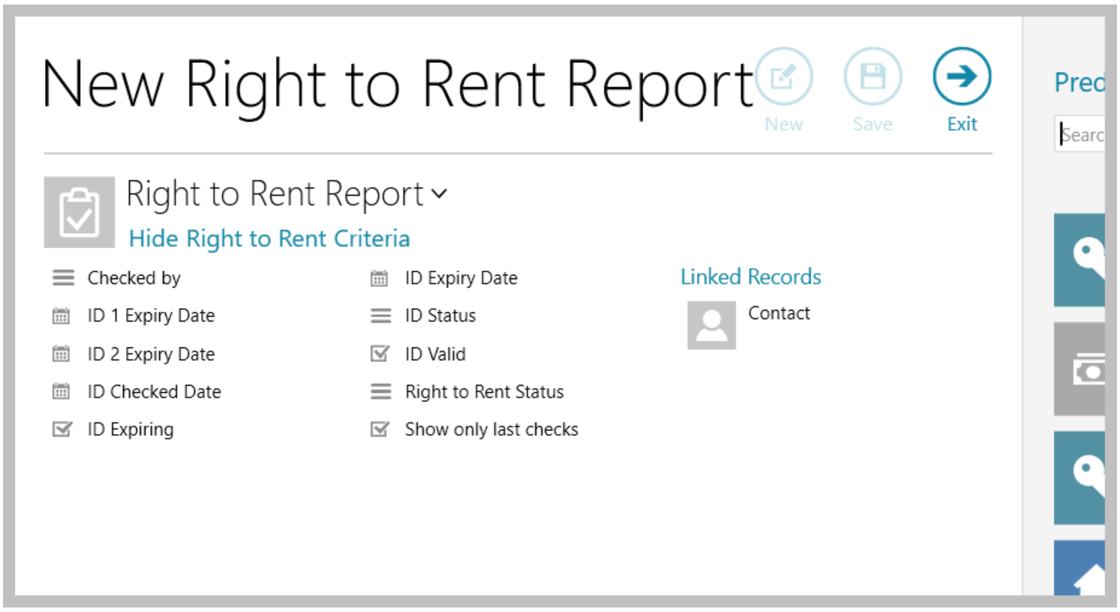
The option to report on RTR checks is only available when RTR ID check functionality is enabled
For more information on RTR check functionality, see Knowledge Base article titled: **Right to Rent (RTR) ID check - configuration option**

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

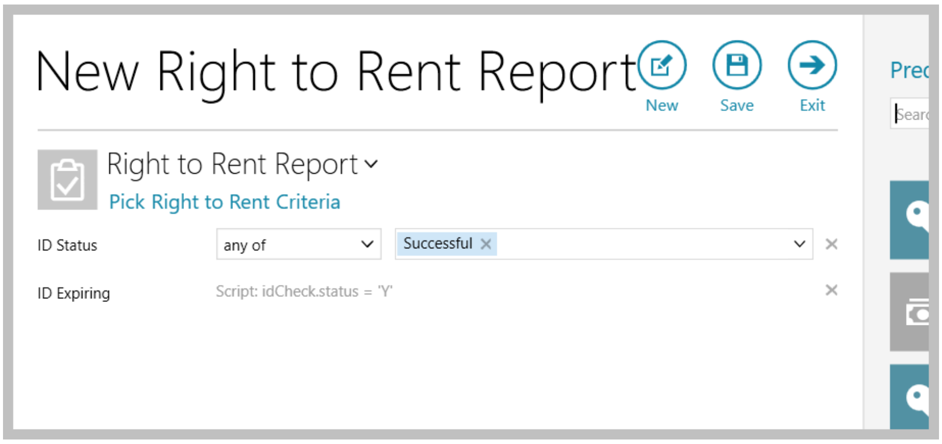


Right to Rent (RTR) Report criteria options include:

- **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

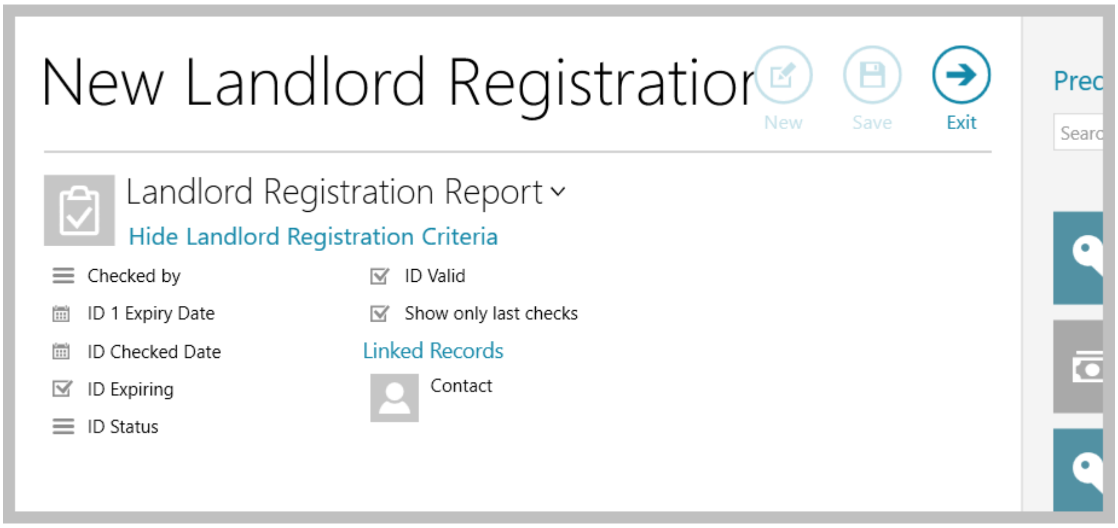
3. Landlord Registration check reports

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

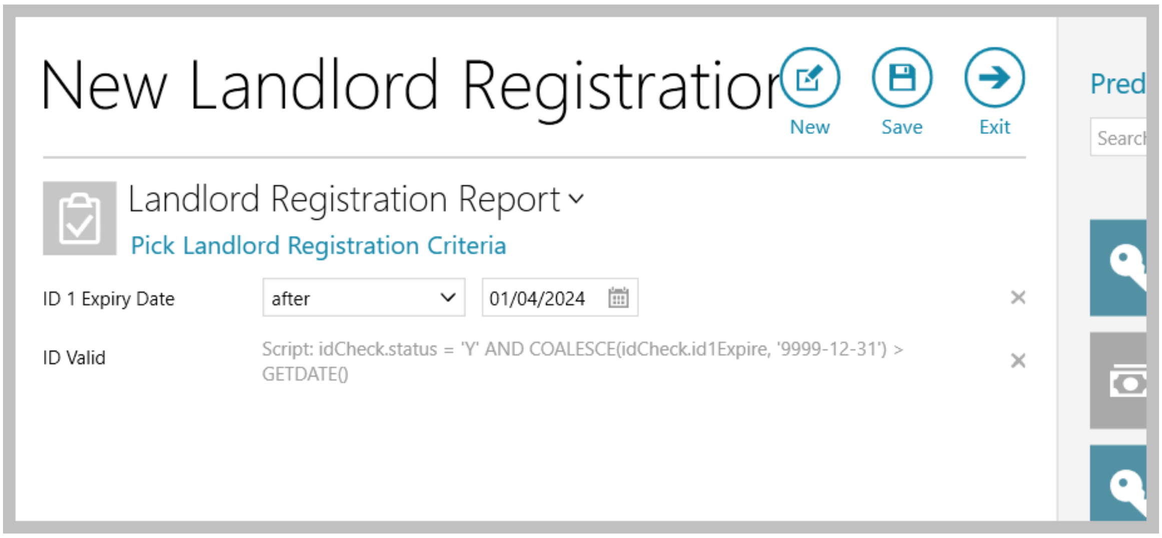


Landlord Registration Report criteria options include:

- **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



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

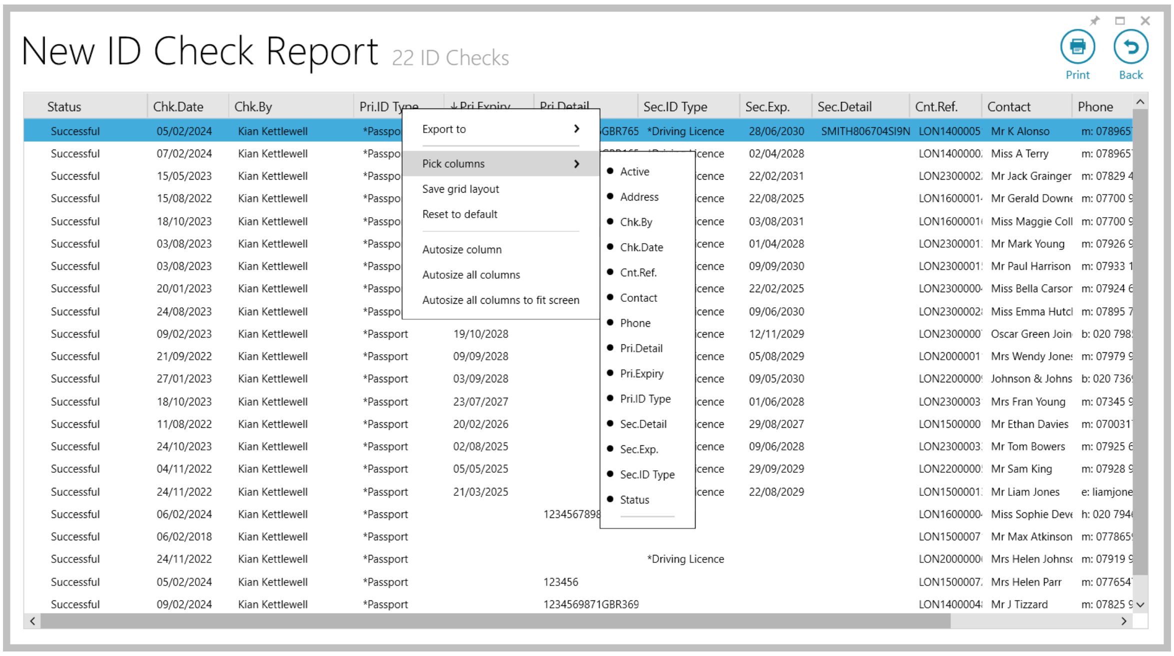
4. Report results grid

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:

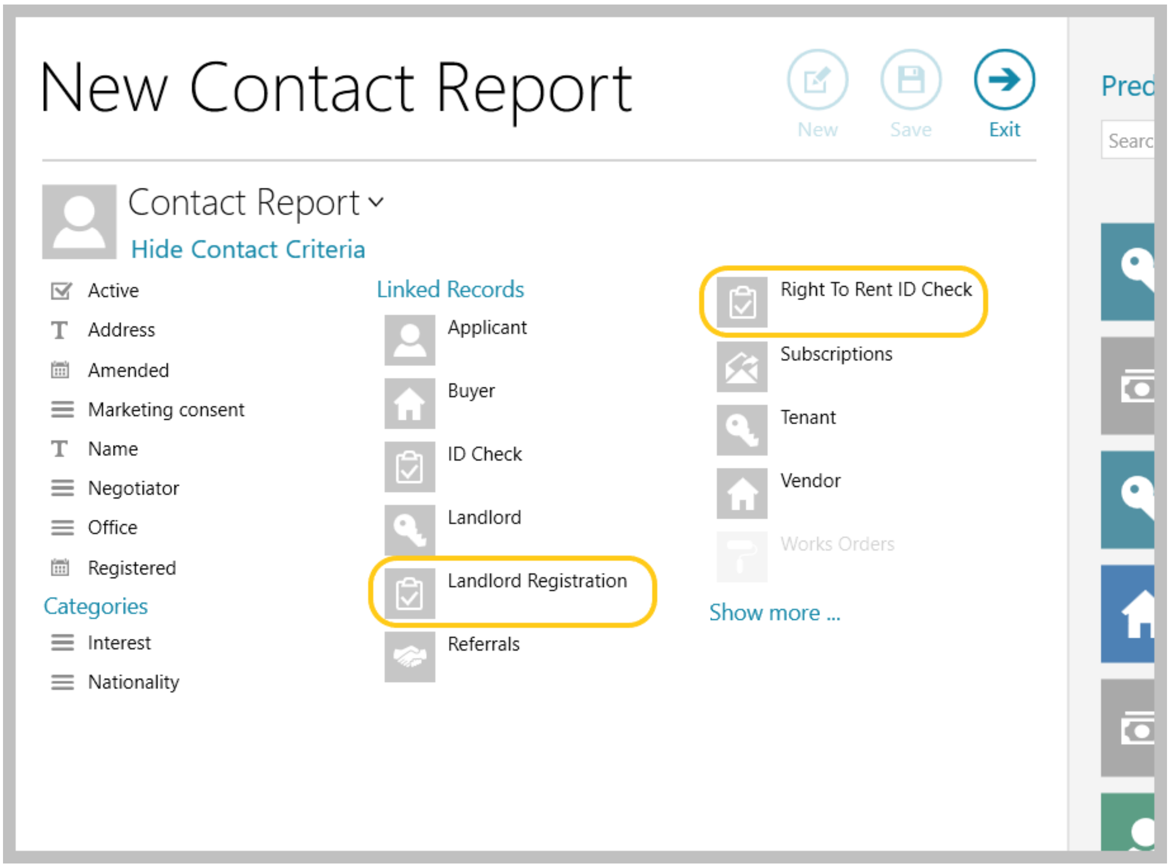
- To sort the list, click the column heading
- To filter the list, click to the right of the column heading to view filter icon and use the search field to filter by content
- Columns can be removed from the grid - right-click over the column headings and select **Pick columns** - columns can also be 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***



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

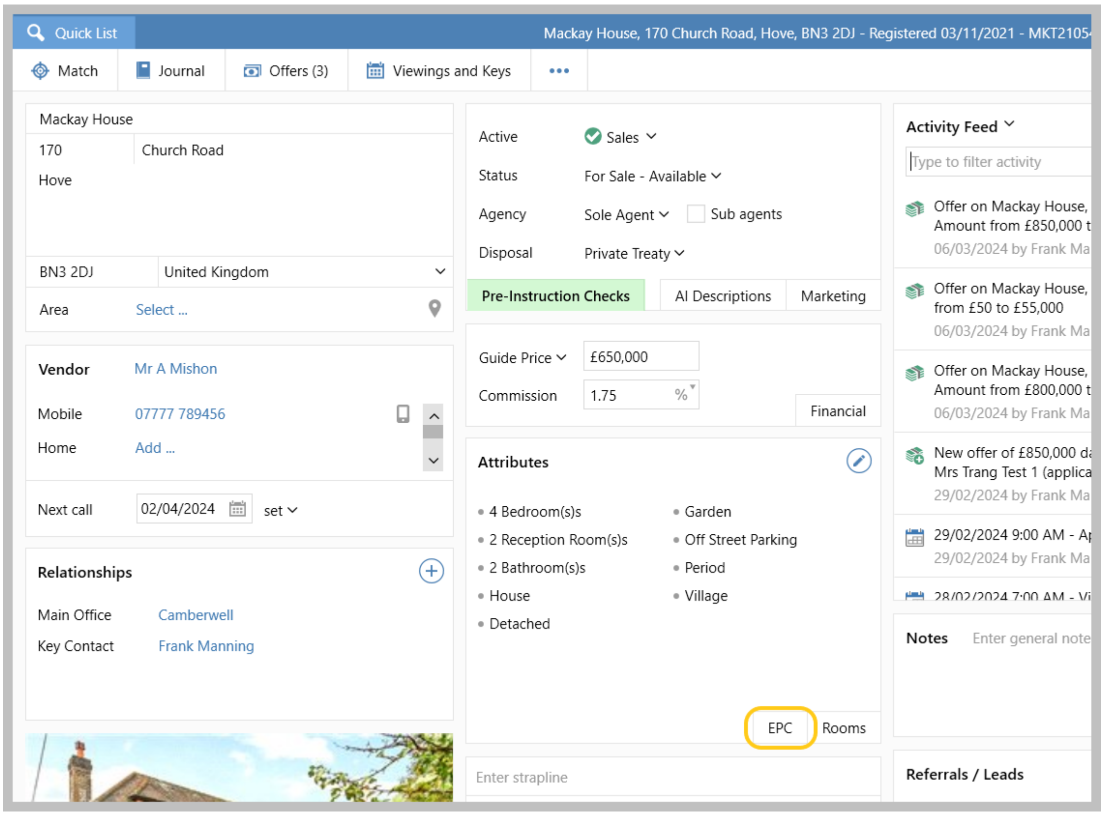
Both residential and commercial EPC data can be retrieved

This functionality allows EPC figures to be retrieved quickly and easily

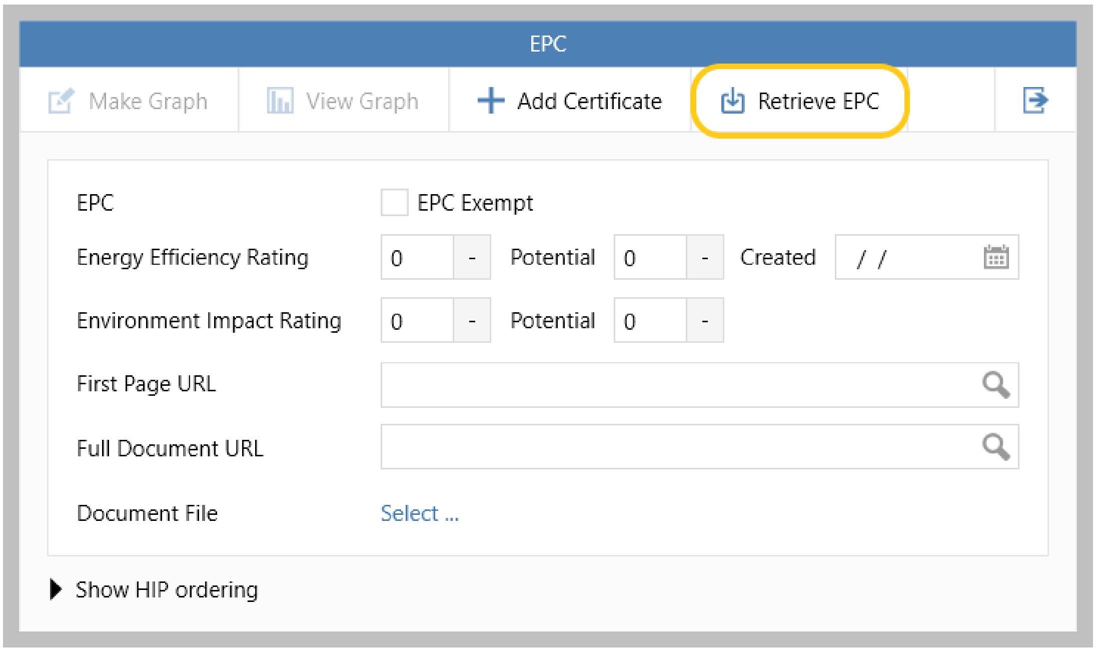
1. Retrieve EPC option

From property record:

- Click **EPC**

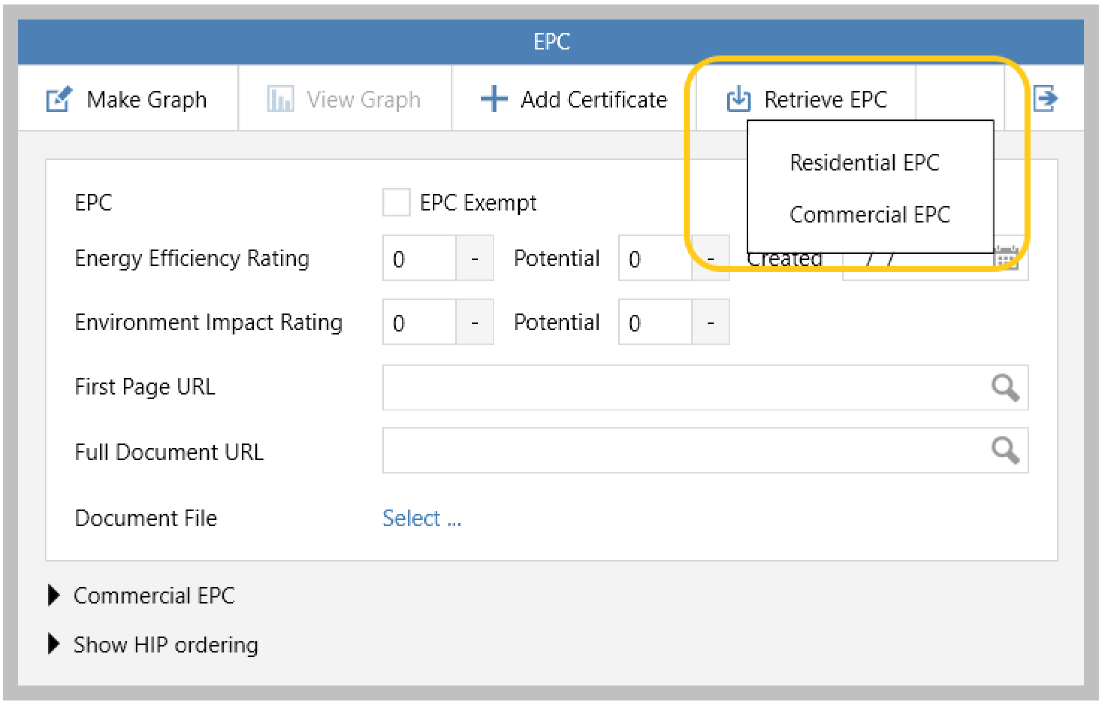


- Click **Retrieve EPC**



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

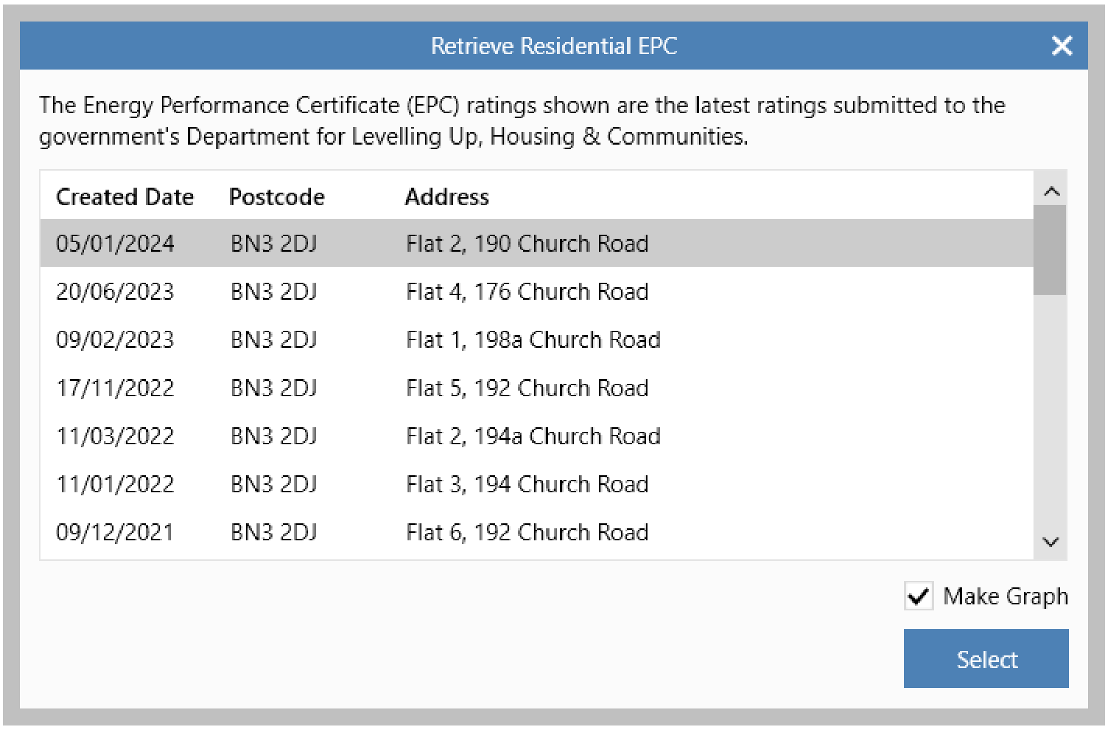
- Click **Retrieve EPC** and select **Residential EPC** or **Commercial EPC**, as required



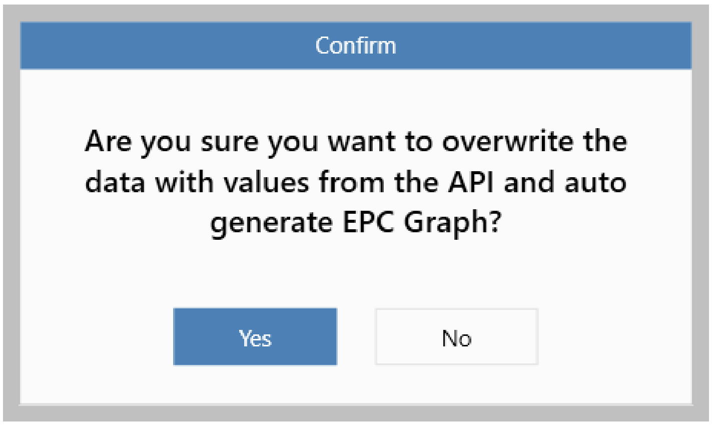
2. Select property

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

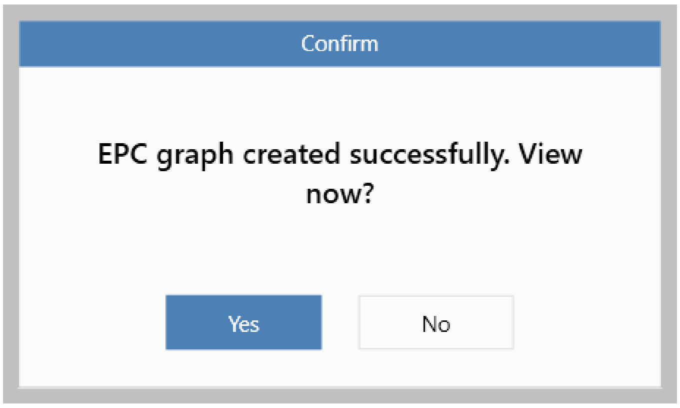
- Select the required property, ensure that **Make Graph** remains ticked so that an EPC image is generated, then click **Select**
  When the **Make Graph** option is ticked, the EPC image is created and automatically added to the property pictures screen



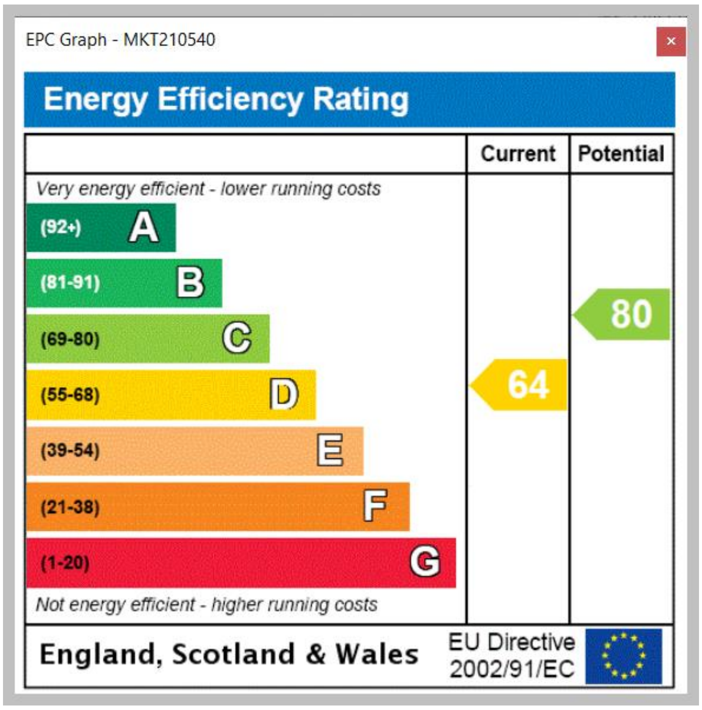
- Any values already entered into the EPC screen will be overwritten with the EPC rating figures and creation date - click **Yes**



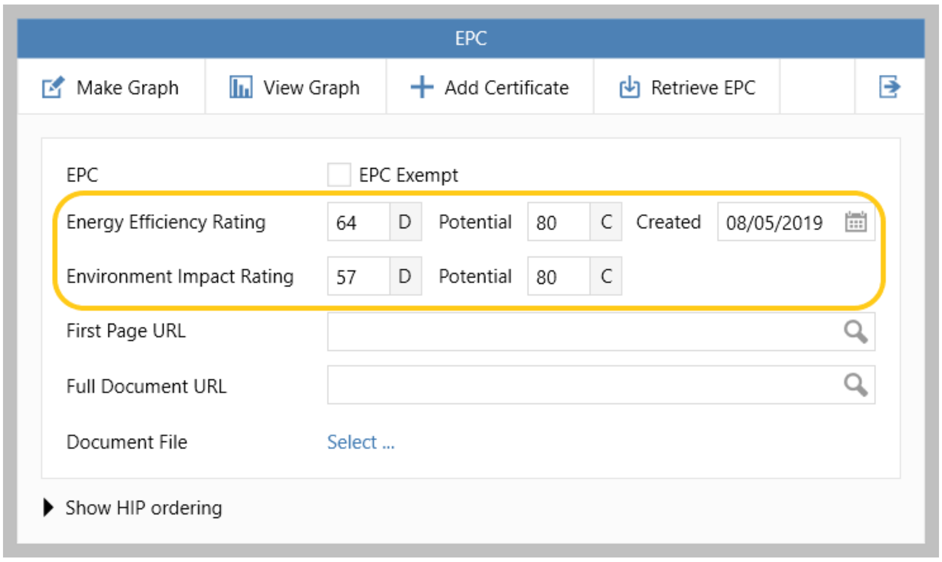
- Click **Yes** if you want to check the graph



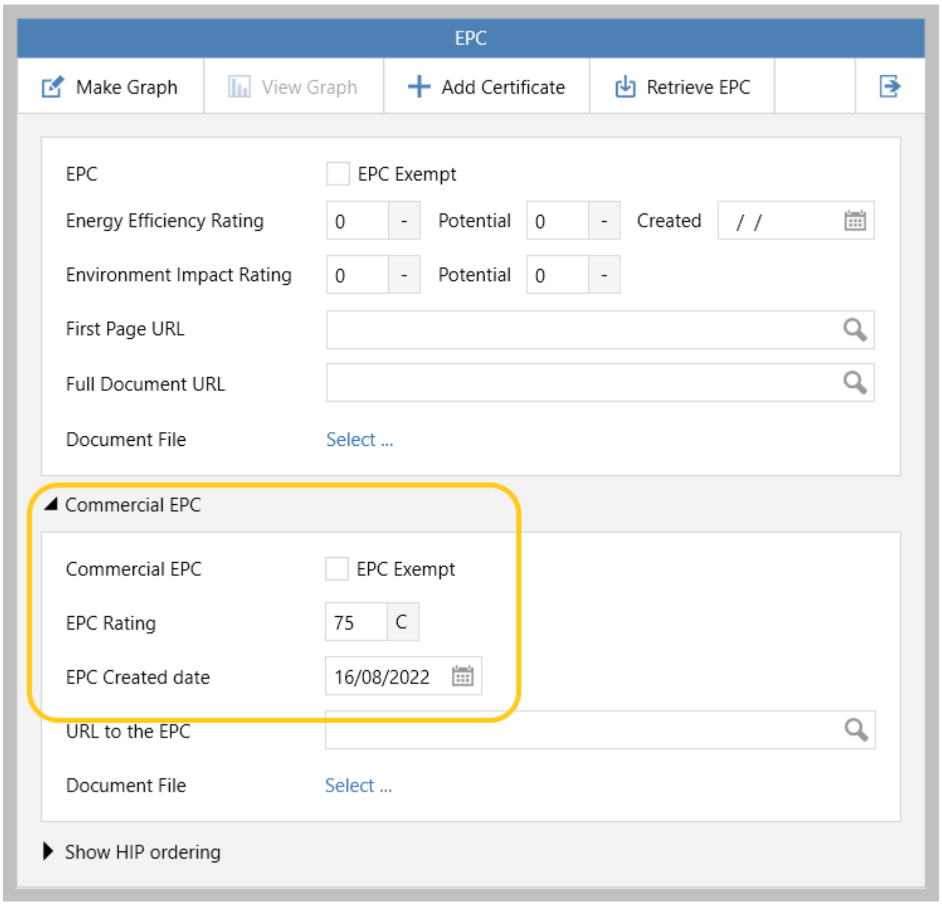
- If you chose to display the graph - it is shown, displaying the relevant ratings retrieved from the API



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



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



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

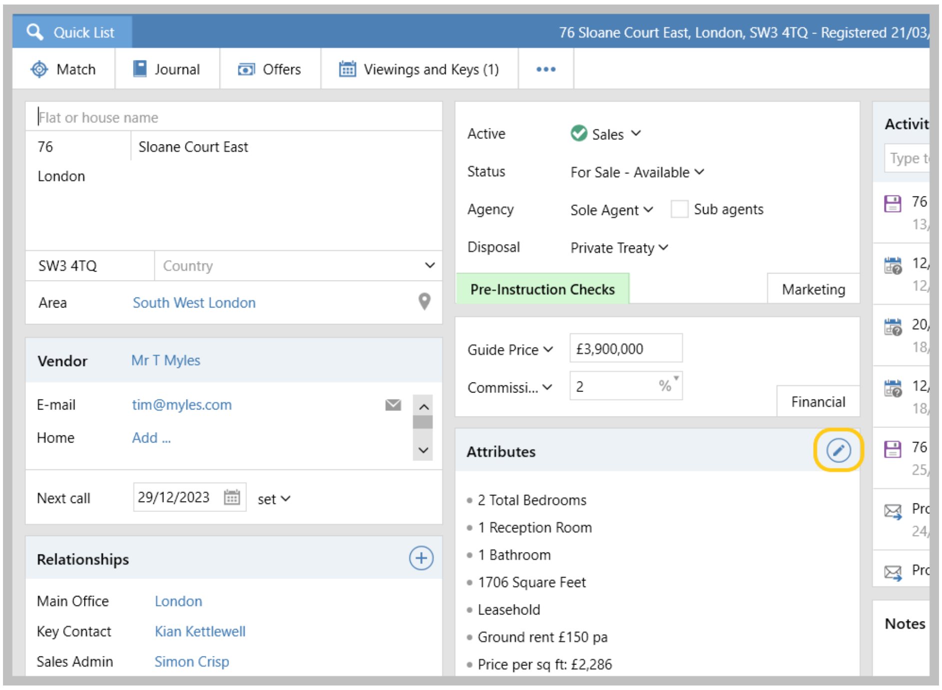
This is in addition to being able to add the ground rent amount (per annum), its review date, increase percentage figure and related notes, which were already available in previous releases

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)

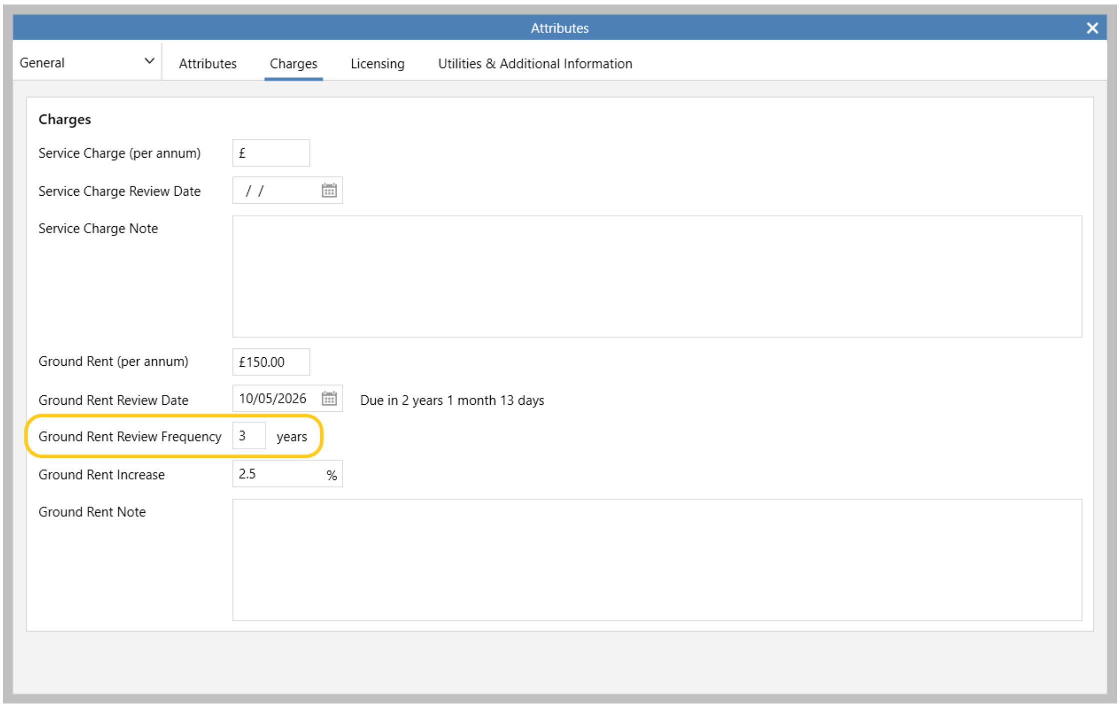
1. Access property attributes

From sales property:

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



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



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

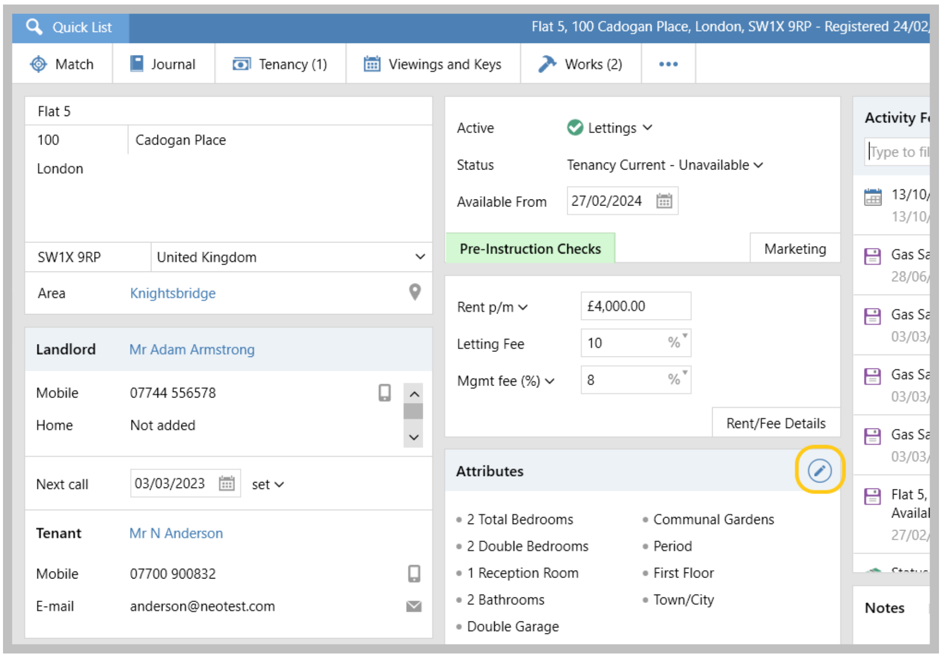
For lettings properties, some of this information could already be logged prior to version 12.181, such as utility providers, meter point numbers and heating type - therefore this information has been transferred from the *Appliances, Insurance & Safety* tab to the new *Utilities & Additional Information*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

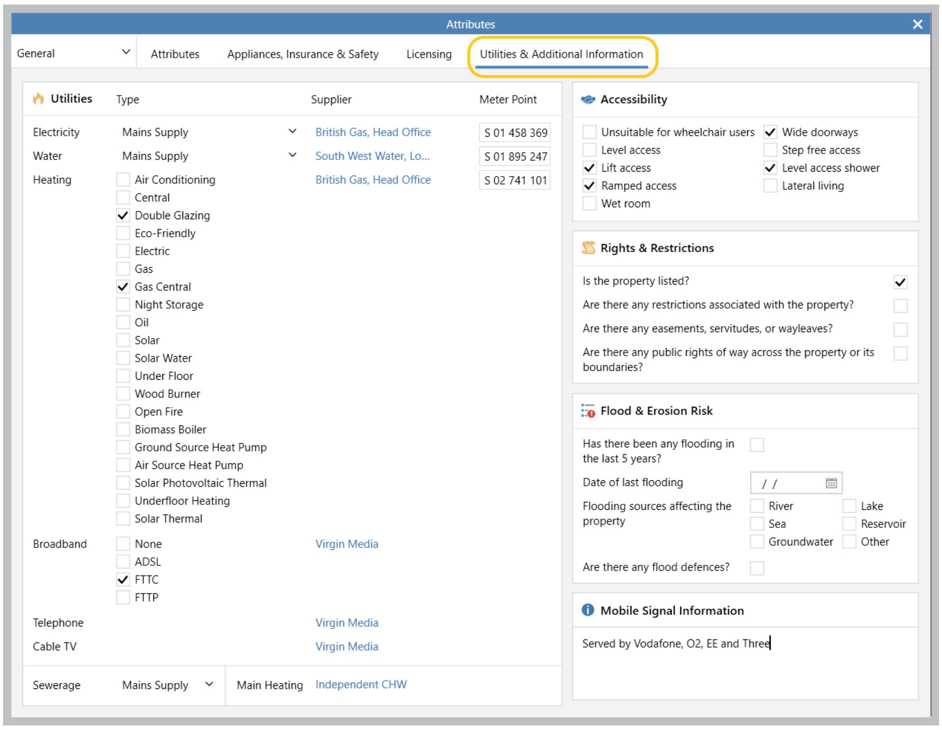
1. Access new Utilities & Additional Information tab

From property (sales or lettings):

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



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

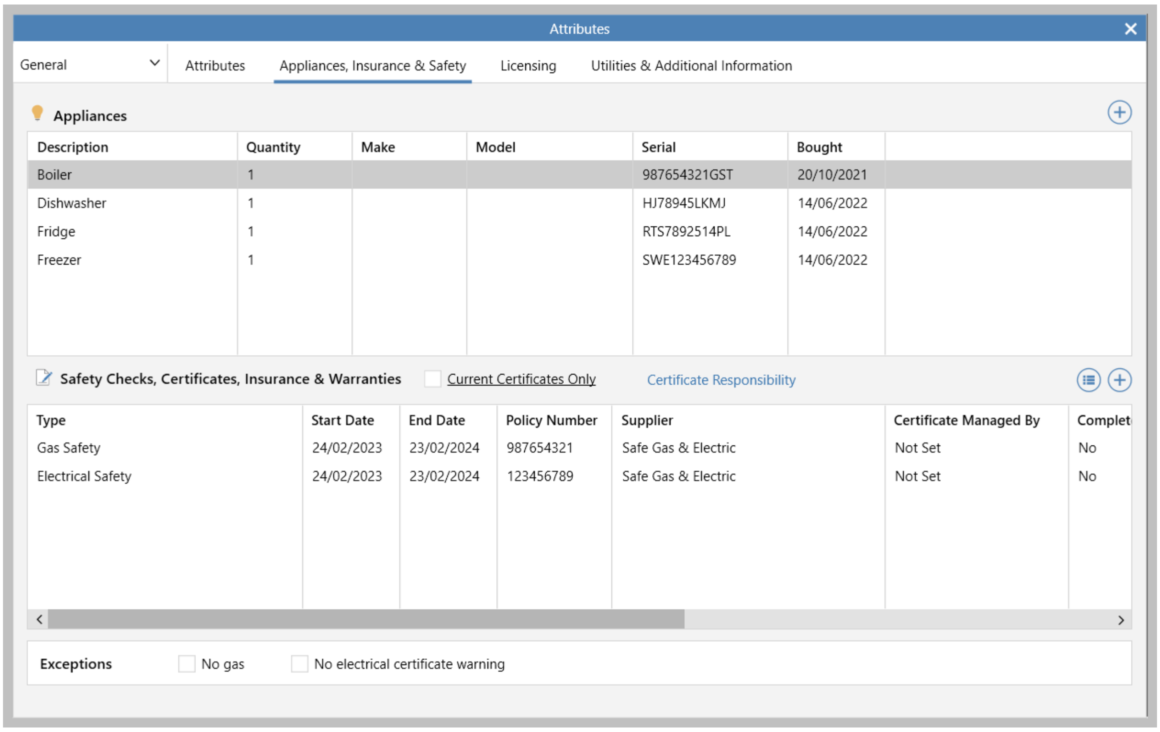


For lettings properties: utility suppliers, meter point numbers and mains heating type was previously stored on the *Appliances, Insurance & Safety* tab - where this information had previously been entered prior to version 12.181, it will now be shown on the new *Utilities & Additional Information* tab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



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 - 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

The unallocated tenant receipts screen has been enhanced so that you can easily expand/collapse each section and, where configuration is enabled, you can:

- Easily distinguish between receipts and invoices
- Add notes to receipts

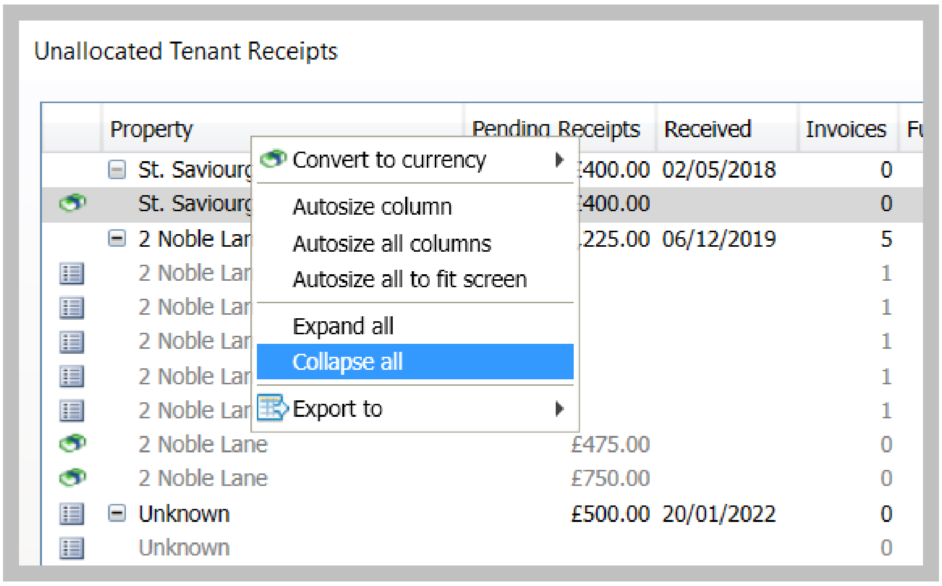
Each enhancement is covered in detail below

1. Easily expand/collapse each section

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

From Lettings/Rentals on main menu:

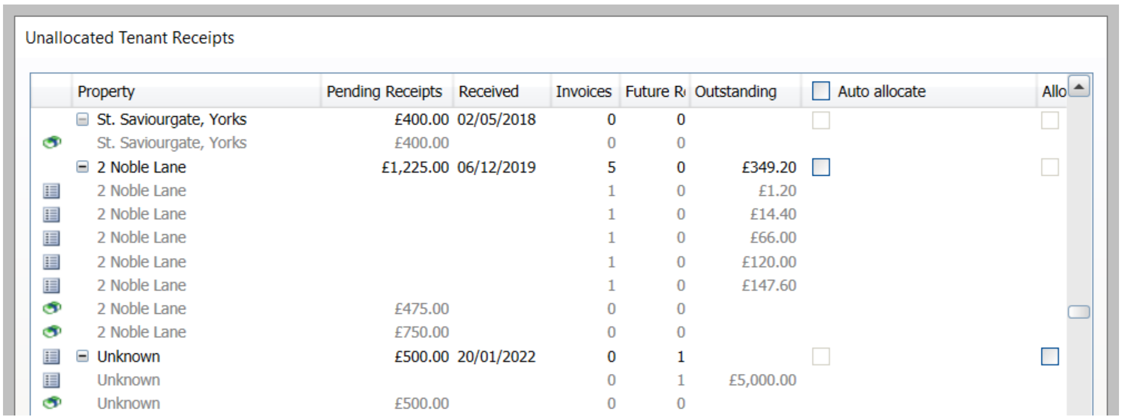
- Click **Daily Accounts** processes and select **Unallocated Tenant Receipts**
- Right-click over the grid headings for options to **Expand all** and **Collapse all**



2. Easily distinguish between receipts and invoices - where configured (see configuration information at the top of this article)

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

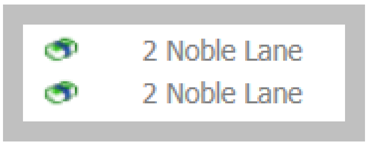
- Beside the property address, click the **+** icon to expand the section



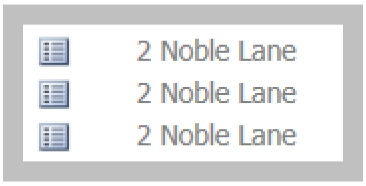
Unallocated Tenant Receipts

Property	Pending Receipts	Received	Invoices	Future R	Outstanding	Auto allocate	Allo
St. Saviourgate, Yorks	£400.00	02/05/2018	0	0			
St. Saviourgate, Yorks	£400.00		0	0			
2 Noble Lane	£1,225.00	06/12/2019	5	0	£349.20		
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			
2 Noble Lane	£750.00		0	0			
Unknown	£500.00	20/01/2022	0	1			
Unknown			0	1	£5,000.00		
Unknown	£500.00		0	0			

- Receipts are shown with a green bank note icon



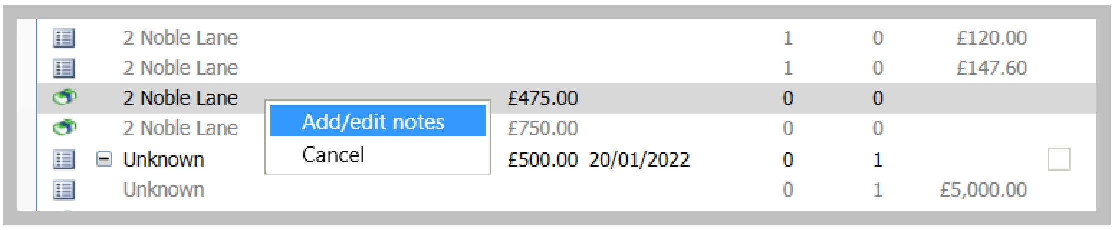
- Invoices are shown with a white note icon



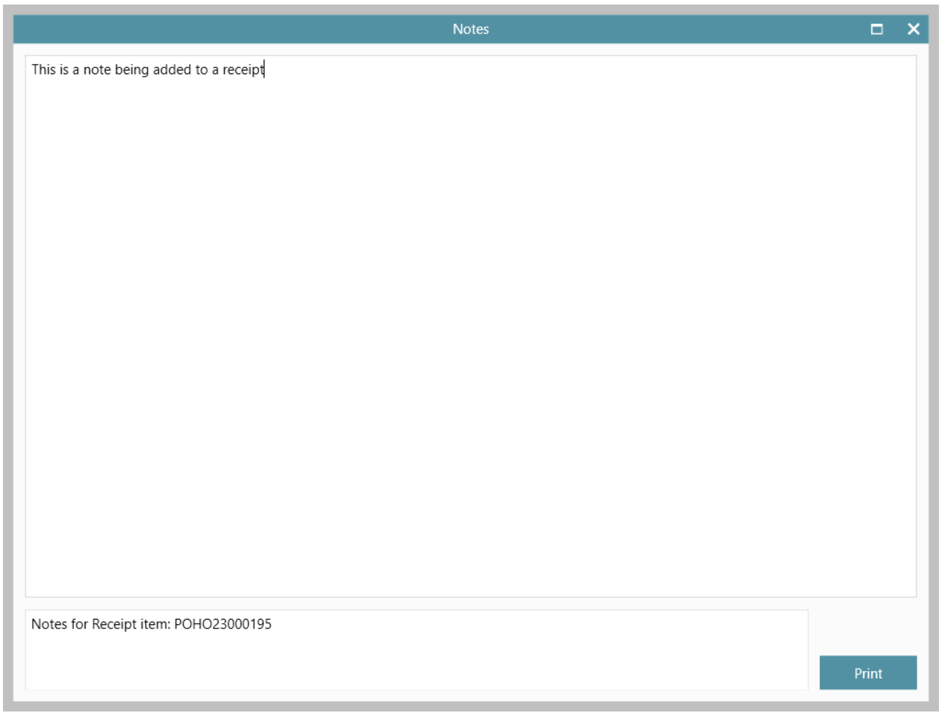
3. Add notes to receipts - where configured (see configuration information at the top of this article)

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

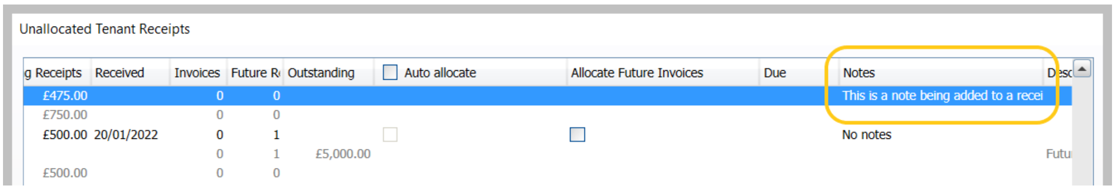
- Right-click over a receipt and select **Add/edit notes**
  This option is only available for receipts (not invoices)



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



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



- 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

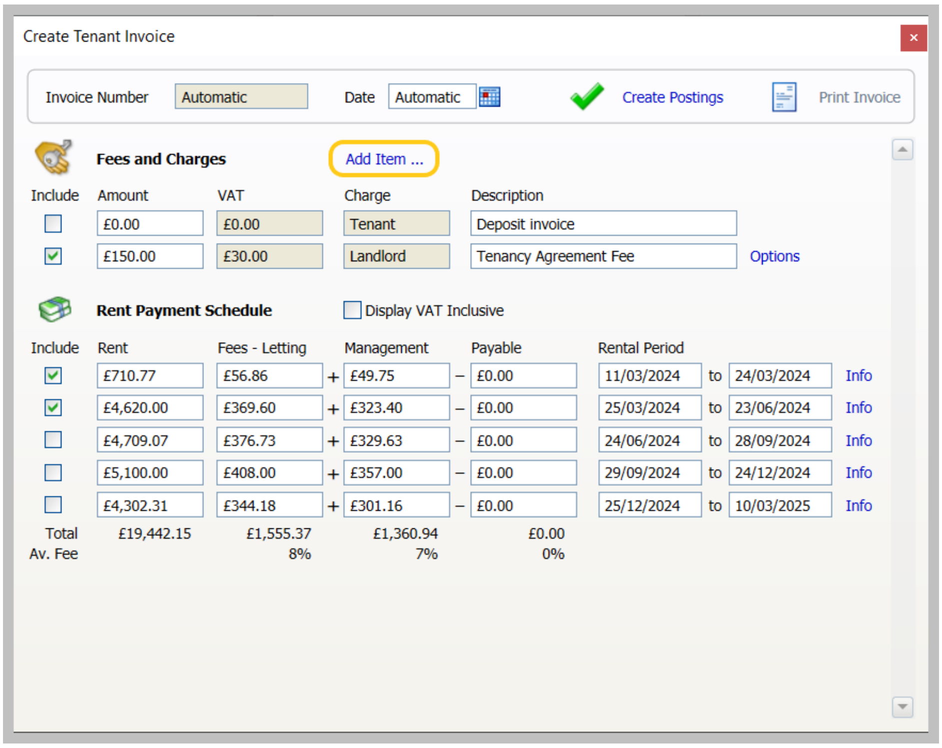
This guide has been reviewed against our global client base and classed as relevant to all regions

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

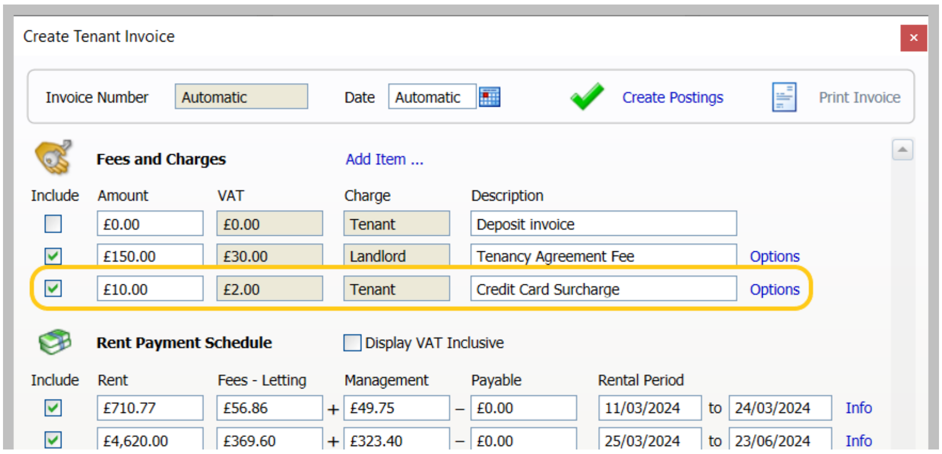
Tenancy fees can be added and saved to an invoice without needing to post it - this is particularly useful for the initial tenant invoice, allowing you to add tenancy fees before the invoice needs to be posted

From the tenant invoice screen:

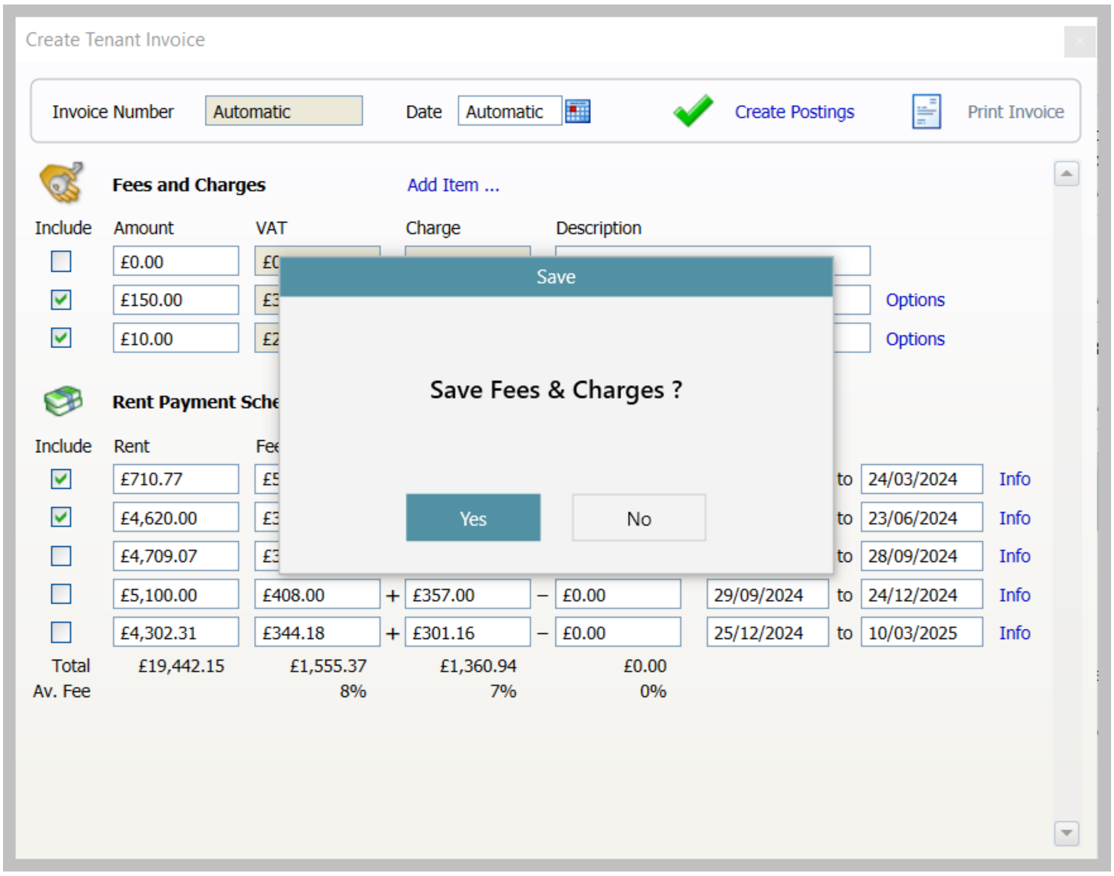
- Click **Add item**



- 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



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



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

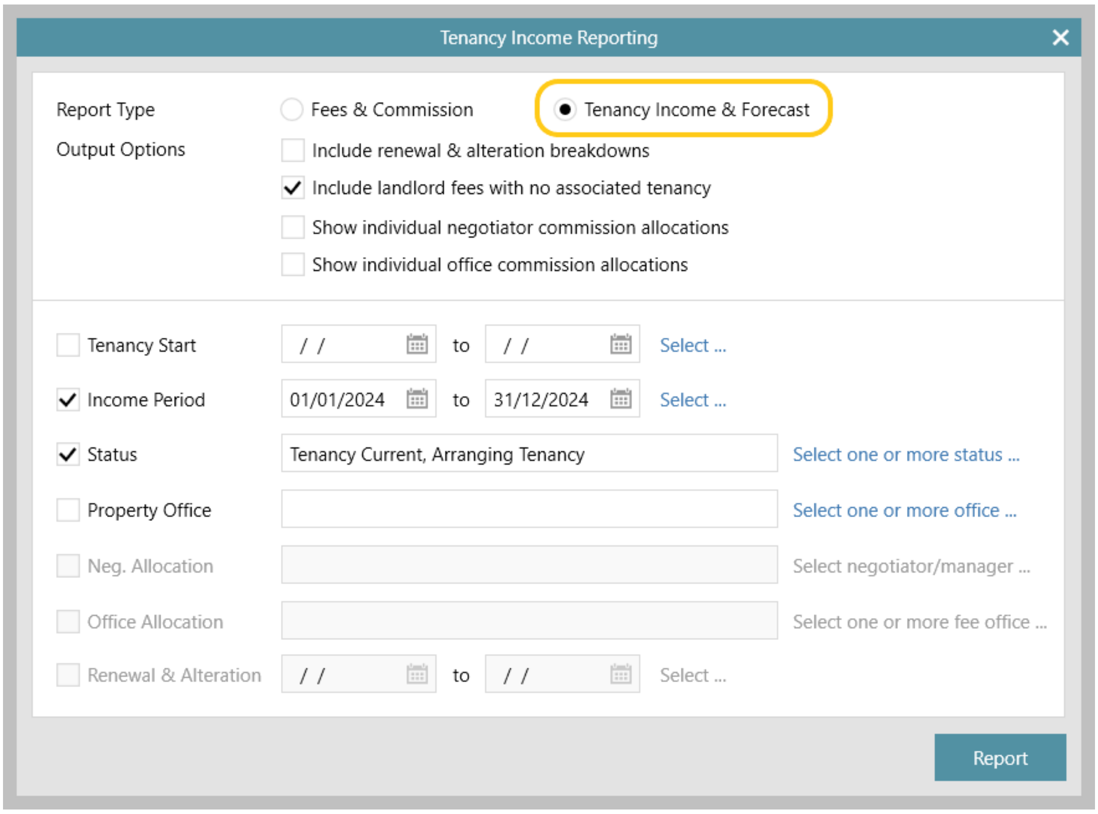
When running a *Tenancy Income & Forecast* report, goodwill payment credits are now shown

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**



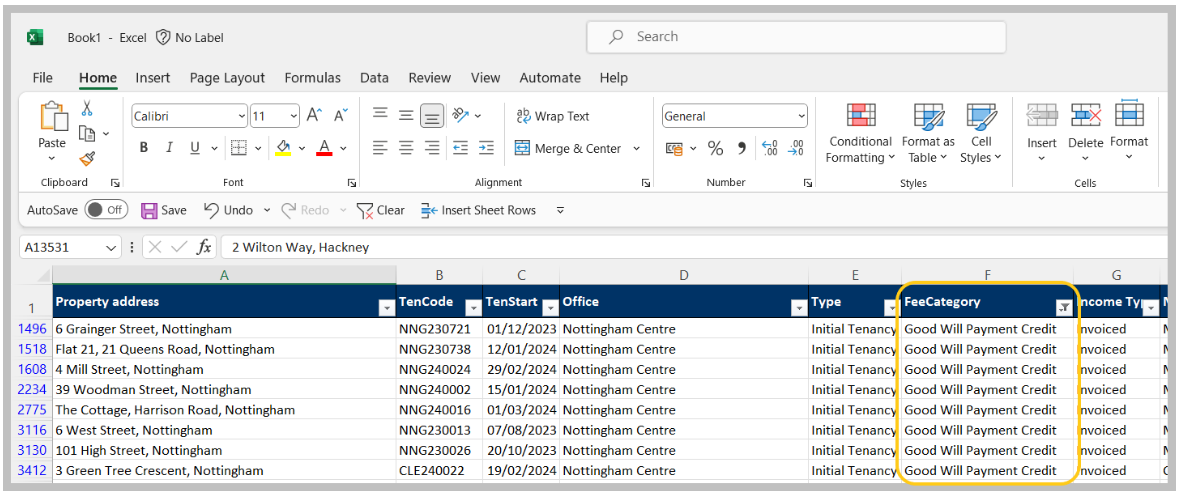
For more information on using the tenancy income report, see Knowledge Base section titled: **Tenancy income report - configuration option**

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.



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