

## Veco Changes Document

### **Introduction**

This document reflects all changes made to the “Veco” software and database starting from version 1.5.0.0.

A list of previous changes is available to download:

<http://www.veco-online.com/veco/pdfs/Veco-Changes1000-1130.pdf>

<http://www.veco-online.com/veco/pdfs/Veco-Changes1140-1180.pdf>

<http://www.veco-online.com/veco/pdfs/Veco-Changes1181-1220.pdf>

<http://www.veco-online.com/veco/pdfs/Veco-Changes1221-1320.pdf>

<http://www.veco-online.com/veco/pdfs/Veco-Changes1330-1404.pdf>

To find out which version of “Veco” you are currently running, click the “Help” menu and then choose “About Veco-onesystem”.

**This Document Includes Details of all changes up to version number: 2.2.0.0 – December 2019**

## How to Install Updates

“Veco” database updates can only be installed by a Veco “Administrator”.

To install an update, follow these instructions:

Ensure you have a verified backup of your SQL Server database.

*Backups are the responsibility of your SQL Server administrator. Eurolink accepts no liability for loss of data caused by failure to create recoverable backups.*

If your SQL Server was installed by Eurolink, a backup program would have been installed to create daily backups of your data in the BACKUP folder. Check the BACKUP folder in your “Veco-onesystem” folder area to ensure backups are being made every day. Alternatively, contact Eurolink Support who will be able to check that backups are being made.

**When running in a Terminal Server configuration, ensure ALL users have logged out of Veco otherwise the new downloaded program will not be able to be installed into the live programs folder.**

From the top menu, click “Admin : Check for Updates”.

“Veco” will first carry out a full data backup to the BACKUP folder. This may take a few moments depending on the size of the database.

Any new changes to your database will be automatically installed.

New ‘veco-onesystem.exe’ and ‘setup.exe’ files will be downloaded and automatically installed as appropriate.

Installing a new ‘setup.exe’ file may require that your PC has ‘administrator’ rights. If you encounter ‘install’ errors when running ‘setup.exe’ you may need to refer to your System Administrator.

New “layouts” and “reports” may be also downloaded as appropriate.

Each user PC where the “Veco” software is installed will automatically detect a new version of the software and install it. This does not apply to terminal server users who will always be up-to-date.

After updating each PC click “Help : About” to ensure you are running the latest released version.

### **Veco Replimate™**

When running Veco in a distributed server environment where Veco Replimate™ is used to synchronise all changes made in each remote location, please note that Replimate™ will stop synchronising until ALL servers in the server farm have been updated.

#### Note

*Non-support customers are not entitled to software improvements, changes, and bug fixes, and will not be able to install updates using the above method.*

#### Important Note

*From version 2.2.0.0 onwards Veco requires Microsoft .NET Framework 4.6.1 (or later) to be installed on your server and all PCs that access Veco. Installing the Veco update should prompt you to install this if you do not already have it installed. However, we recommend that you consult the person or company responsible for your IT infrastructure if you need assistance in ensuring Microsoft .NET Framework 3.5 (or later) is correctly installed.*

## Updating Property & Contact Form Layouts

From time to time the “Default” Property and Contact form layouts may change as additional fields are added. If your Veco Administrator has tailored the form layouts to allow for different departments, they will need to be re-created based on the “Default” layout, otherwise the additional fields will not appear. To do this:

1. Open any existing Contact or Property
2. Select “Default” from the department layout selection list
3. Click “Load Layout”
4. Click “Customise”
5. Make changes to the form layout as required
6. Select the relevant department from the selection list
7. Click “Save Layout”
8. Do this for other departments as required
9. Close the existing Contact or Property
10. This only needs to be completed once and not for every Contact or Property!
11. If the only change to a layout has been the addition of new fields, these can be added to the layout manually by using the layout “customisation” facility.

## **Version 2.2.0.0 - December 2019**

### **Updates and New Features**

#### **Update/clean up appointment form to include option for all parties**

Addition of flags for owner and applicant to confirm appointment and parameters for validation

#### **Global search option**

Addition of a global search function

#### **Add the ability to pin notes**

Ability to pin notes to the top of the notes list within a record

#### **Update desktop icon**

Change to the icon for Veco™

#### **Update loading screen**

New updated loading screen when initially starting Veco™

#### **Update “Pop up” functionality of While You Were Out and Told and Sold**

Update to the way popups for While You Were Out and repairs are shown. This new feature uses the Windows notification centre on the user's machine.

#### **Update Skins**

Update to skins within Veco™

#### **Fixflo additional URL**

Additional Fixflo URLs to allow more than one Fixflo account per database.

#### **Include Powergrids on the 'Actions Log'**

Printing and exporting from Powergrids now shows in the actions log

#### **Zero Deposit - Deposit scheme option**

Ability to add a zero deposit scheme to a tenancy record

#### **Update ribbon on all forms**

Ribbons now have specific colours relating to the form type you have open

#### **Update the categories photo option to use drag and drop**

Addition of the ability to categorise photos by dragging the images to order

#### **Update MyVeco, ribbon and tree icons**

Update and refresh of the icons used in MyVeco and the Veco™ Tree

#### **Update email form to include embedding images**

Update to allow embedded images into email

**Property fee field to be Included in the statement data source**

Property percentage fee field included as part of the statement data source

**Updated Neg Work Space**

Redesigned Neg Work Space

**Lead Management**

The ability to fetch lead directly from Rightmove and manage the lead qualification process

**Updated to communication database view**

Updated view to return data more efficiently.

**Updated Quick Forms**

Improvements and updates to the way data is entered into Veco™

**Fixes**

**Cannot write to log file when two instances of Veco are open**

Resolved

**Appointments incorrectly moving with property manager change**

Resolved

**Archive Applicants process ignores unamended contacts**

Resolved

**Filename for initial/renewal charges invoice PDF not unique**

Resolved

**Service Charge Budget report - attaching to wrong contacts/properties**

Resolved

**Prevent Print/Export user setting doesn't apply to the Powergrid print/export buttons**

Resolved

**Not able to clear Contract Expires Date**

Resolved

**Printing Notes – alignment issues**

Resolved

**Non-GDPR compliant issue where using 'Data Held' export option**

Resolved

**Unable to save owner group when the split percentage has decimal places**

Resolved

**Ampersand (&) character doesn't render correctly on statement**

Resolved

**Error when using 'Forget Contact' on a system without AuditMate**

Resolved

**Amended By on charges table not updated when archiving tenancies**

Resolved

**DISTINCT required in the data source for remittance advice**

Resolved

**Oil Service date cannot be cleared once set**

Resolved

**Get Map option not treating five character postcodes correctly**

Resolved

**Available applicants search results not being able to clear/reset option**

Resolved

**Error when saving Sales MA**

Resolved

**Not able to open Freeholder Group from property window**

Resolved

**Print icon on Diary Projection**

Resolved

**Mislabelled dropdown boxes on the Filter section for Diary Projection**

Resolved

**Time shown on Required From field on applicant pop out**

Resolved

**Adding Accounts to Agreed Fees**

Resolved

**NLJs not included in the Brought Forward and Carried Forward calculations**

Resolved

**Tenancy Status Change log - logging erroneous entries relating to Deposit Release**

Resolved

**Property/Contact form labels writing to log file**

Resolved

**Veco allowing multiple instances of the same Repair record to be opened**

Resolved

## **Version 2.1.7.0**

### **Updates**

#### **Get Maps**

Fixed issue with generating map via get maps on property screen

#### **Document Renaming**

Performance improvement

#### **Resource Calendar**

Performance improvement

#### **While You Were Out popup clashes with the GDPR prompt window**

Update to prevent the GDPR popup clashing with the while you were out popup

#### **Date Validation: When 29th Feb entered as Date of Birth**

Update to year and validation.

#### **Update to when multiple users open the same bank reconciliation**

Only one user can now update a bank reconciliation record at a time.

#### **Estate Budget**

The Estate Budget Form now checks for any missing units and adds them in where they are missing. This fixes the issue and any historical ones where units are added in future years and budgets fail when browsed.

#### **Upload Documents not saving/uploading from the Lettings/Sales Specific form**

Update to allow saving to complete.

#### **Estate Budget - Sub department**

Receipts SLP now checks for a sub department on the transaction to be allocated to and whether the amount allocated is the same on the SLI and SLP and updates the SLP if applicable.

#### **Alignment on Tree Access**

Update to allow scrolling on the tree when not previously available.

#### **Scheduled Charges - Raising Charge In Arrears**

Updated time/date conflict.

**Admin / Neg Responsibility Of - not updated when archived**

These fields are now updated with the new user when a user is archived.

**RTF Mail Merge preview window renders fonts 0.3pt larger than Word**

Document now loading in the correct size.

**Staff list on email form shows archived users.**

List now only shows active users.

**Receipts SLP - lower half of screen doesn't update**

Resolved.

**Incorrect Communication details attached to repair**

Resolved.

**Displaying Less future allocated receipts**

Query updated to now include freeholder department.

**MyVeco shortcuts can be used to bypass the End of Month lock**

MyVeco Tool Bar no longer enabled to the user who is doing the period end routine.

**Freeholder payments**

Update to validation of balance to check the Estate connected to the transaction.

**Recurring appointments disappearing**

Update to fix the issue.

**Supplier Salutation on Work Order email**

This merge field is now available on the Works Order email.

**Tenancy Offers – Populating Move Out Date on created tenancy record**

Resolved.

**Make Live on Draft Transactions**

When processing Draft transactions, it now looks to see if allocations are allowed when tenancies are not live and if not then do not create the allocations.

**Email All Tenants - ignores whether the tenant has moved out**

Updated so this now only selects active tenants.

**Rounding Issue on SLI & PLI**

Resolved.

**Reversed transaction remaining allocated**

Resolved.

**Live SLP made CBR by Unknown Receipts when two user in drafts transactions**



Resolved.

#### **Powergrid Emailing**

Emailing from Powergrids now defaults to BCC.

#### **Form Data Types - Job Role Spelt Incorrectly**

Resolved.

#### **Email All Tenants - does not make a note against the contact**

Resolved.

#### **Supplier Discounts on AdHoc Invoices**

Resolved. issue where supplier discount was being removed

#### **If sort code / account number detail is reset back to blank/NULL - 'add account details' only users are able to change the details.**

On both the contact and owner form when the user has 'add bank details' checked but not 'update bank details' it searches for any bank details changing in the audit log and allows it to be edited or not if the field is currently empty (new or emptied by another user).

#### **Method of calculation on the Quarterly Tax Return grid causing rounding issues**

Resolved.

#### **Contact bank details not logged in Detail Changes**

Resolved.

#### **When entering a new plot on Developments you cannot save the record due to error**

Resolved.

#### **Error when using Create one invoice per Tenancy parameter**

Resolved.

#### **Importing receipts crediting reserve banks when same bank detail being used**

Resolved. to always use default bank

#### **TDS Bulk File Upload Erroring**

Amended the timing of checking the TDS site for the results file to extent to two minutes.

#### **Suspense account shows on the Tenancy Balances grid - errors when opening**

Suspense accounts will now be prefixed with 'Suspense-' in the Tenancy column, this is picked up when double clicking a row and fires the Owner routine instead.

#### **Directors Email field prevents freeholder statements from being sent if set to NULL**

Resolved.

#### **Incorrect Note user permission**

Resolved.

**Editing CBT removes bank rec flag**

Resolved.

**Communication details of unrelated contacts appear to be merging**

Resolved. - Ctrl-f10 will not open when a communication form is open.

**Brought Forward Balance line disappears from the Account Summary statement grid**

Resolved.

**Multiple Freeholders tick box - doesn't clear freeholder ownership against the Estate**

Resolved.

**Bank Rec - batch window ignores bank rec flag**

Resolved.

**Bank Rec - finalising without Refreshing**

The finalise button will not become active until a refresh has been done after selecting a transaction.

**Bank Rec - Bank Rec difference figure doesn't recalculate when pasting figure with mouse**

Resolved.

**Bank Rec - Reconciling after a transaction has been edited**

It will now refresh the grid and recalculate when the finalise button is pushed. Then checks transaction is still equal to zero, if not message box asking to refresh and re try.

**Email used to email when using the Tenancies and Main Contact MM data source**

Change query to use default communication when ordering email addresses so default will always be picked first to give some control to the user.

**Double Click on Pivot Grid produces an error**

Resolved.

**Forget contact - anonymisation where mandatory fields not already populated**

It will no longer prompt to save changes when closing the contact form.  
Have also prevented saving changes when using the save button.

**Using 'Forget Contact' on active tenants**

Resolved.

**Deposit Diaries**

If Responsibility Of changes then it updates the Deposit Release Appointment.

**Archive Tenancy**

When importing a receipt and it matches an Archived tenancy it will now set the Tenancy Status to Active.

**Sales Offers Chain Details**

If there is no chain then the tab title will display "Chain (no chain)"

### **Right Click Menu on Grids**

Resolved. issue where wrong menu was being displayed from right clicking on grids.

### **PLP Payments**

Added a grid refresh into the error handler. If it errors, you close the error box and the grid will refresh.

### **Error when deleting from Works Orders**

Resolved.

### **Calendar not filling**

Resolved.

### **Archiving users that are set as Renewal Clerks**

If the renewal clerk of the tenancy is not part of the renewal office it will still display them in the dropdown.

### **Error when dismissing appointment reminders**

Resolved.

### **Error when emailing Freeholder Statements**

Wasn't handling multiple freeholders correctly now Resolved.

### **Invoice No. in description of PLI part payments on manual allocations**

Resolved.

### **Lock view neg work screen**

Fields added to allow a restore.

## **Upgrades**

### **Customising Negotiator work screen**

Ability to customise the property grid within the Negotiator workscreen.

### **Increase Notes**

Increase Notes in right click view

### **Booking Multiple Viewings**

You can now drag a list of properties into the order they wish to book viewings in.

### **Suitable Applicants Grid**

A column added to the suitable applicant's grid for last contacted.

### **Columns on contact grids**

Addition of "GDPR Lawful Basis Recorded", "GDPR Date Lawful Basis Recorded", "GDPR marketing Data" and "GDPR marketing Data" columns to the following grids.

- Owners

- Lettings Applicants
- Tenants
- Suppliers
- Sales Applicants
- General
- CRM Contacts
- Guarantors

### **Page breaks in mail merge templates (RTF)**

Page breaks are available when you CTRL RETURN(ENTER) is available.

### **Multiple docs to notes**

Will now handle selecting multiple docs from the dialogue window.

### **Estates Detectors Tab**

Added detectors to the estates grid

### **Email from Works Order**

Addition of functionality to allow for emails from works orders

### **Workflow on Sales Progression**

Workflow templates added to Sales Progression.

### **Function to email all owners from the owner group**

Changes to Email form and Ownership form to allow email to all owners.

### **Pop Up to be displayed when reactivating a contact**

GDPR form will now display if Tenant, Supplier, Owner or Applicant status is changed from Archived.

### **Detector Dates**

Detector dates added to the properties screen

## **Version 2.1.6.3**

### **Fixes**

#### **Update to Workflow Target Date**

Added Parameter to decide if the Target date is Consecutive or Concurrent

#### **Tenancy Renewal Clerk no longer mandatory**

Change so the Renewal Clerk is only relevant if the parameter of which user is linked to the Visa Check Date on a Contact is set to 'Renewal Clerk'. A prompt will now only display if there is a Visa Check Date on a Tenant in the Tenancy and the Parameter is set to 'Renewal Clerk'.

#### **Tenancy Views**

Fix issue relating to error 91 being displayed when on the grid

#### **Right to Consent GDPR prompt on Neg Workscreens**

Added the Right to Consent prompt on the Quick Lettings Applicant, Quick Sales Applicant, Quick Contact and Quick Owner & Property.

#### **Error posting SLP from unknown receipts to non-live tenancy**

Fixed error occurring when posting SLP from unknown receipts

#### **Properties Units Licensing Schemes**

If Lettings/Management is ticked at a later date, it now picks up the licensing scheme

#### **Tenancy Offers/ Initial Charges**

Receipts added on initial charge on tenancy offers now carried over to tenancy

#### **Saving Tenancies Records**

"Capacity Exceeded" error resolved

#### **Anonymising Records Address Update**

Error resolved, address now replaced with NULL instead of being deleted

#### **Updated Service Charge Demand Data source**

Missing freeholder field and bought forward balance field included

#### **Anonymising Note Type Error**

Field length increased to stop error

## Version 2.1.6.0

### New and additional features

#### Anti-Money Laundering

Details for anti-money laundering will be visible from the Applicants and Vendor contact records. These fields are visible as read only from the Sales Progression/Offer Progression screens

#### Right to Rent (Visa Check / Expiry)

Enhancements to the Right to Rent functionality within the Tenancy screen including:

- A popup displayed when users open a tenancy with an expired Right to Rent date
- A popup displayed when users attempt to enter or amend a renewal date where there is an expired Right to Rent date or a Right to Rent date that will expire during the new term
- Mandatory field of 'Renewal Clerk' to be in place at the point of setting the tenancy to active

#### Minimum EPC Rating

Added ability to filter Lettings Property grid and Managed Properties grid by EPC number and EPC letter grading – This can be enabled under "Admin" > "General Parameters" and is on the main details tab.

Added ability to exempt properties from the minimum EPC requirement – This can be found on the "Lettings Marketing Details" tab of a property.

#### GDPR

All GDPR functionality can be found under a contact record by going to "Actions" and selecting "GDPR Details". There is a further "Actions" menu item once the GDPR window is open. The "Actions" menu from within the GDPR window is only accessible by admin users.

Below are items that have been included in Veco™ with regards to the legislation changes coming into force for General Data Protection Regulation (GDPR). We suggest you contact your own Data Protection Officer/GDPR Consultant/ Information Commissioners Office for information on how you comply with these changes.

#### GDPR – Privacy by Design

An additional tick box has been added on the contacts screen, allowing the users to record consent. The point at which the tick box is amended, a date will also be added to the field 'consent date' so should you be using Consent as your lawful basis you are able to track when consent was obtained and therefore when it expires. **For all existing contacts the tick box has been ticked by default.** An additional prompt has been added at the point of creating a new contact which is confirming you have a valid lawful basis for storing and processing the data – This can be enabled under "Admin" > "General Parameters" and is on the main details tab (disabled by default)

#### GDPR – Right to be Forgotten

Added functionality to comply with the Right to Erasure (Right to be Forgotten) in the GDPR and enables you to remove a contact from the system should you need to. Veco does not delete the contact but anonymises the data, Veco carries out various checks on the record to ensure that you are not retaining this data under a Legal Obligation or Contract Basis such as no transactions in the last 6 years and no outstanding balance on the account. An audit is also added to show the time and date of when this action took place if a contact can't be forgotten from the system.

#### GDPR – Right to Access

Additional functionality added to comply with the Right to Access requirement in the GDPR to allow for information relating to a contact to be provided to the individual in a machine readable format.

The running of this functionality will result in all information held in Veco relating to that contact to be downloaded into a Spread Sheet. An audit has also been added to record the time and date when this information was downloaded from the database.

### **GDPR – Data Portability**

The Data Portability requirement is also covered in the same functionality as above, as you can provide the Spread Sheet to the individual to transfer the data you hold about them

### **Van Mildert**

Tick box added to user profile to restrict access to Van Mildert referencing information, restricting this can control who in your business has access to the personal information of all your contacts that is passed and held by Van Mildert. Please note that all users will be unticked by default and you will need to manually tick each user that will require access to the “Track Reference” and “Order Reference” features.

### **Fixes**

#### **Offers & Sales (Completion)**

The applicant is also set as an Owner.

#### **Repairs (Open Current Tenancy)**

If there are two tenancies with the same Occupied date, one archived, the archived one might be opened instead of the current active tenancy.

#### **Properties/Units (Key Log)**

If there is only one set it was not allowing the key to be logged out even though it had been marked as returned.

#### **Unknown Receipts (Non-live Tenancy)**

You were able to allocate monies to a non-live Tenancy.

#### **Types (Rental Frequency)**

It was possible to add to this list.

#### **Properties/Units (Copy Property)**

The parameter to limit the number of properties an Owner Group can have was not being applied.

#### **Mail Merge Templates (RTF)**

An error was occurring when using Save As.

#### **Users (Archiving Future Appointments)**

A prompt is now shown asking to archive only future appointments.

#### **Properties/Units (Upload Documents)**

These are now saving in the appropriate sub folder.

#### **Spell Checker**

This has randomly lost the dictionary and listed all words as incorrect.

#### **Notes (Follow Up Appointments)**

Duplicate Follow Up Appointments were being created when the Note was saved again.

#### **Workflows (Target Dates)**

This was being calculated differently depending which at which point the starting Target Date was entered. Now the Target Dates are calculated from the starting target Date.

#### **Specific Forms (Notes)**

The Incorrect column was not on the Notes tab of the Specific Property and Applicant forms.

#### **Tenancies/Deals (Balances Grid)**

Some tenancies were showing as having a balance even though it was zero.

#### **Properties/Units (Categorise Photos)**

The buttons on this form could be lost when resizing the form.

#### **Tenancies/Deals (Tenants Grid)**

A blank row on this grid was causing a saving issue.

#### **Diary Dates Grid (Save Selection)**

If there were more rows in the grid than were shown saving the selection would cause an error.

### **Version 2.1.5.3**

#### **Notes**

Error saving note attachment from Drag & Drop

#### **Tenancy Transfers**

Issue with long processing time

#### **PLI Allocations**

Parameter to allow allocations for PLI & PLP for non-live tenancies not working correctly

#### **Properties/Units, Sales Marketing Details**

Contract Expires date not saving

#### **Owner Groups, Main Office**

Not being updated if Office name changes

Missing function related to non-resident landlord tax calculation causing errors

#### **Properties/Units**

Error generating Map

#### **Properties/Units**

Map as well as EPC are automatically save in Photos

### **Version 2.1.5.2**



### **Suitable Properties, Email Properties**

Error when embedding list

### **Tenancy Offers, Initial Charges**

Error opening form

### **Transactions**

Error in mfAllocation

## **Version 2.1.5.1**

### **Properties/Units**

Gas Expiry date not saving

## **Version 2.1.5.0**

### **Additional Functionality to Existing Features**

#### **Rent Guarantee**

Added an additional parameter in general parameters to use 3rd party insurer

#### **Estates, Invoice Apportionment**

Current Budget not always displaying as such

#### **Contact Salutations**

Added missing Owner Group Title parameter options

#### **Contacts**

Added GDPR Details under Actions menu

#### **Properties/Units, EPC Graphs**

When generated the EPC graph is now automatically added as a photo

#### **Mail Merge**

Changed Tenancies data source to include Visa Check Date

#### **Mail Merge**

Changed Tenancies and Main Contact to include Tenant Visa Check Date

#### **Sales Progression Grid**

Added Fee Amount column

#### **Transaction By Nominal Grid**

Added Deleted column

#### **BACS/Cheques**

CBRs for HMRC are included

### **Bank Reconciliation**

When Finalise is clicked the form re-opens

### **Properties/Units, Works Orders Grid**

Addition of Invoice Number column

### **Owner Payments Grid**

Addition of a parameter in accounts parameters to refresh this grid if inactive after set number of minutes

### **Payments (PLP)**

Addition of a parameter in accounts parameters to show Freeholder Balance & Float and also Estate Balance & Float columns

### **Payments (PLP)**

Addition of a parameter in accounts parameters to order by Payment Priority column

### **Tenancy Offers**

Added Initial Charges to the tenancy offers screen, which are then copied to the created Tenancy

### **Mail Merge**

If data is missing that previously resulted in a blank final document a message is now shown instead

### **Sales Progression Grid**

Addition of Marketing Office column to the sales progression grid

### **Image Editor**

Added a Saved confirmation message

### **Transactions, SLN**

Can now add an attachment to a sales credit note

### **Estate Year End**

Attachments to PLN and SLN transactions will also be emailed to Accountant as part of the estate year end process

### **Tenancies Grids**

Added Parking and Outside Space columns to the grid

### **Offers and Sales**

Added prompt to update Web Status of Property to Parameter value when Offer Status is set to Completed

### **Properties/Units**

Added above Commercial tick box to grid

### **Properties Grids**

Added above Commercial column to grid

#### **Tenancies/Deals, Add Tenant**

Added a parameterised prompt to warn if contact is already in another Tenancy

#### **Properties/Units, Detectors**

Added Status column to grid

#### **Properties/Units, Appliances**

Added Status column to grid

#### **Tenancies/Deals, Initial Charges**

Added Deposit Release tab to grid

#### **Repairs, Import from FixFlo**

Can import block/estate issues

#### **Repairs, Import from FixFlo**

Invalid media types are added to note as link

#### **Contacts, Joint Applicants**

Added Include In Match tick so when property match is done on one applicant the other ticked applicant also receives sent match results

#### **Properties, Gas Safety**

Added Capped option and Capped Gas Date to grid

#### **Contacts, Owner Details**

Added Land Registry and ID fields to form

#### **Developments**

Added upload to portals

#### **Owner Groups, Actions, Reports**

Added reports for Freeholders

#### **PLI Allocations**

Added parameter to allow allocations for PLI & PLP for non-live tenancies

#### **Estates**

Added Directors tab

#### **Freeholder Groups**

Added Directors tab

#### **Estates**

Added Email Directors Statement field

## Improvements / Bug Fixes

### **Grid Views**

Fixed error where column TDSL had been saved

### **Mailmerge**

Fixed error Incorrect syntax near ; fixed

### **Types, Property, Frequency**

Fixed error allowed this list to be added to

### **Unknown Receipts**

Unless parameter set non-live tenancies can't be selected

### **Properties/Units, Key Log**

Fixed error not allowing keys to be booked out where sets have been returned

## **Version 2.1.4.1**

## Additional Functionality to Existing Features

### **Works Orders, Email Works Order**

Added prompt to also email any Photos if there are any

### **Developments Grid**

Added Report button to toolbar

### **Developments**

Added Brochure

### **Properties/Units, Licensing Schemes**

Administrators can mark a scheme as Excluded

### **Properties/Units, Licensing Schemes**

If an existing property is ticked as Lettings/Management on save any relevant Licensing Schemes will be added to the Property

### **Licensing Schemes**

Missing Postcodes can be added to a scheme

### **Properties/Units**

Added Oil Service Key Date field

### **Properties/Units**

Moved Heating Type to Main Details tab

## Improvements / Bug Fixes

### **Initial Charges**

Resolved error on saving Renewal Receipts

### **Initial Charges**

Fixed Screen Layout

### **Tenancies/Deals, Communication Tab**

Resolved 'Email All Tenants' error when using Outlook

### **Notes, Email Attachment**

Resolved error when sending a RFT as PDF

### **Repairs, Print Notes**

Output is sized to note details

### **Works Orders, Contact 2, Contact No**

Resolved issue with field not filling in even though data has saved.

### **Works Orders**

Resolved error when saving new if Invoice Number is filled in

### **Works Orders, Contact 2**

Can be cleared from field

### **Properties/Units, Key Log**

Resolved issue with not allowing returned sets to be booked out

### **Users**

Resolved error when saving a new User

### **Mail Merge Templates, RTF**

Resolved error on Save As

## **Version 2.1.4.0**

## Additional Functionality to Existing Features

### **Contacts, Specific Forms**

Addition of a CRM Details button

### **Offers & Sales, Communications**

Also shows any communications for any Vendor related Contacts

### **Joint Applicants**

Added parameter to archive all applicants in a joint application, found in general parameters

### **Diary Dates Grid**

Added save and load selection to the grid

### **Properties/Units**

Added parameter to prevent EPC date from being cleared

### **Contacts, Registered Address**

Added parameter (general parameters) so if the contact is a Tenant and has a Company Name it must also have a Registered Address

### **Specific Forms**

Added Category list box

### **Power Grids, Emailing**

Now will only send where the selected column is ticked

### **Tenancies/Deals, Communication Tab**

Added right click option to Email All Tenants

### **Sales Progression Grid**

Added Create View options on grid

### **Suppliers Balance Grids**

Added Estate column to grid

### **Properties/Units Grid**

Added Estate Name column to grid

### **Notes, Email Note**

Can now minimise the Email form to allow navigation to other screens

### **Tenancies/Deals, Deal Status**

Added User setting to allow the changing of Deal Status if not set as Manager

### **Tenancies/Deals, Archive**

Can now Archive if there is a move out date that has been reached which is before the vacating date

### **Owner Groups, Documents Preview**

Now also pulls through Contact note documents

### **Keys**

Can reuse a reference if the previous set is marked as No Longer Held

### **Key Log**

Can book out up to the number of sets held

### **Email Attachments**

Can now multi-select files

### **Freeholder Group Grid**

Added Float Amount column to the grid

### **Diary Projection**

Added parameter (general parameters) to default to All Users and All Offices

### **Follow Ups**

The Note Type is now the Appointment Subject within the diary

### **Freeholder Statement**

Added Last Payment Date field to the statement

### **Works Orders**

Added Second Contact fields to the Works Order form.

Please note, some manual adjustment will be required to your Works Order template before these new fields will show on the Works Order printout/email. Please contact our support department should you need help adding these.

### **Estate**

Added Boiler Service Date key date

### **Properties/Units**

Added Boiler Service Date key date

### **Notes**

Added user setting to allow marking as Incorrect

### **Applicants Grids**

Can set a colour to highlight as a new applicant based on parameter settings (general parameters)

### **Contacts, Contact Details**

Added Time at Address field

### **Contacts, Additional Details**

Added Age on Registration field

### **Improvements / Bug Fixes**

#### **Contacts**

A note is now added when made a contact is made Active and Archived

#### **Specific Forms**

Resolved bug trying to open too many Contacts/Properties from the Specific forms

## **Version 2.1.3.0**

### **Additional Functionality to Existing Features**

#### **SMS Property Details**

Added [Web Link 1] and [Web Link 2] as merge fields

#### **Repairs**

Added option to email all attachments such as documents and photos

#### **Tenancies/Deals, Meter Readings**

Added Miscellaneous field

#### **Tenancies/Deals**

Added Tenancy Sub Type field and added to Tenancy grids

#### **Draft Transactions**

Added Save and Load selections options

#### **Suspense Accounts**

Added Save and Load selections options

#### **Repairs**

Added Print Notes option

#### **Tasks**

Managers can remove documents from completed tasks

#### **Sales Progression Grid**

Added Office drop down

#### **Applicants, Specific Forms**

Added create Appointment option

#### **Owner Groups**

Title field is linked to Salutation settings

#### **Appointments, Viewings**

Property marketing details are pulled through to the Description

#### **Joint Applicants, Notes**

Added option to view all joint applicant Notes

#### **Mail Merge**



Added option to lock finished merged document

### **Applicant Areas**

Added user setting to limit the list of areas by office region

### **Available Lettings Properties Grid**

Added options to column chooser for Pets, Smokers, Sharers and Students

### **Improvements / Bug Fixes**

### **Owner Groups, Accounts Summary, Tax Pending**

Was including the tax element of receipts for fee charges set as % of Rent Due

### **Leaseholder Statements**

Added individual address fields for the leaseholder in the report datasource

### **Ownership, Accounts Details**

Resolved issue with details being saved with stars

### **Import Receipts**

Added parameter to allow negative values to be imported as SLRs else draft SLPs

### **Draft Transactions**

Negative SLPs can't be moved to suspense

### **Tenancy Transfers**

No longer creates the SLI

### **Create TDS File**

Can mark a tenancy as uploaded but was not part of the TDS file

### **Properties/Units, Sub Tabs**

Moved Agreed Fees and Licensing Schemes further forward

### **Appointments, Remainder Date**

Resolved error on save if cleared

### **Calendars**

Improved loading performance

### **Void Periods**

Users Registered date if after Start Date range

### **Letters**

Resolved error saving

### **Contacts, Documents Tab**

Resolved error trying to open emails

### **Tenancies/Deals, Legal Insurance**

Resolved issues which can cause Veco™ to get stuck if occupied date is before the first accounting period

### **Estates, Budgets**

Resolved issue with check Schedule Lines causing an error

## **Version 2.1.2.2**

### **Additional Functionality to Existing Features**

#### **CNR Tax Grid**

Added right click menu option to create draft invoice transactions

#### **Tenancy Transfers Grid**

An SLI is also created now

#### **Tenancies/Deals**

Accounts Summary tab moved next to Agreed Fees tab

#### **Raise Charges (SLI)**

Added parameter to prevent charges for a future accounting period being raised

#### **Works Orders**

Added Time Created and Time Completed fields

#### **Works Orders**

Added parameter to allow the changing of the Date Created

### **Improvements / Bug Fixes**

#### **Properties/Units, Tenancies**

The Add Tenancy button was not linked to Form Access rights

## **Version 2.1.2.0**

### **New Features**

#### **Tenancy Fees Pending**

- Addition of a new grid to allow a percentage tenancy fee amount.
- A parameter option has been added which will need to be selected for this to work.

### **Additional Functionality to Existing Features**

#### **Invoice Generator**

Added parameter to create one invoice per Tenancy.

#### **CNR Tax Grid**

Addition of new column on the above grid to show No Tax Report Required.

## **Communications**

Now can be fully audited through Automate.

## **Import Receipts**

Negative Amounts are now imported as SLRs

## **Appointments, Recurrence**

Issue fixed where error message displayed when an end date is entered against the recurrence

## **Service Charge Budget Report**

Order of report now sorts by addressee and/or address.

## **Freeholder Statement**

Order of report now sorts by addressee and/or address.

## **Leaseholder Statements**

Order of report now sorts by addressee and/or address.

## **Improvements / Bug Fixes**

### **Auto Allocate (SLP) Grid**

Improved performance of loading grid.

### **Diary Projection**

Rest of Month now filling correctly.

### **Licensing Schemes**

Changed to also match by full postcode

### **Cleanup Duplicate Contacts**

Resolved error occurring on search of duplicate contacts.

### **Bank Reconciliation**

Resolved rounding issue causing 1p difference.

### **Developments, Reports**

Resolved error on running the above reports

### **Void Periods**

Resolved issue of the above not calculating correctly.

### **Statements, Attachments**

Resolved issue of deleted transactions' attachments being included as part of the statements process.

### **Raise Charges (SLI)**

Resolved error when processing the above grid.

### **Calendar Form, User Calendar**

Resolved issue with the above loading slow.

### **Key Log**

Resolved issue with the find option not locating all Properties.

## **Version 2.1.1.0**

### **Additional Functionality to Existing Features**

#### **Freeholder Groups**

Addition of new field on contact screen for a float amount to be entered for Freeholders. This will hold back the amount entered when running payments.

#### **Tenancies/Deals, Deposit Details**

Addition of two new fields in the deposit tab on the tenancy to record if the deposit scheme is Custodial or Insured.

#### **Tenancies/Deals**

Addition of a new parameter in General Parameters to set a default deposit scheme and to restrict users from the ability to change this in a tenancy.

#### **Developments**

Added functionality for entering marketing details against a development in Veco™. This will give users the ability for entering photos and marketing descriptions. Marketing section for developments is accessed via a button on the developments screen.

### **Improvements / Bug Fixes**

#### **Statements, Tenancy Due**

Resolved issue of tenancy due being calculated on property and tenancy but not also joining the owner group so if a property changed owner during a period this would appear on both owner group statements.

#### **Quick MA Forms**

Change to allow 0 (zero) to be entered against bedrooms.

### **Properties/Units**

Change to the Last Contact Date that is set when adding a note so that it is set based on the marketing status.

### **Properties/Units, Lettings**

Additional field on the Properties/Units Lettings grid to show the Let Type of the property.

### **Service Charge Budget Report**

Date range picker added to the reports screen to allow users to choose which budgets are to be included.

### **Statements**

Refunds now use allocation date instead of transaction date when calculating the arrears total.

### **Freeholder Fees Pending**

Now takes into account the last time the process had been run.

### **Repairs**

Resolved issue with error being displayed when saving a repair against an estate.

### **Complaints**

Additional parameter added to allow any department user to be displayed in the assigned to list.

### **Grids, User Lists**

Users list has been changed to look for all non archived users; this is a change from the list previously looking at active users.

### **Statements, Bookmarks check**

A warning message is now displayed and the process stopped if statements do not have a bookmark setup and the old statement process is used.

### **Auto Allocate (SLP)**

Resolved issue with same allocation Date & Time when multiple allocations occur against one transaction.

### **Diary Dates Grid**

Filter bar now displaying on the grid when it first loads, this is when grid is set as home.

### **Transactions, CBT**

Amounts are now displayed in the analysis for reversed transactions.

### **Initial Charges, Landlord**

Changed so report no longer displays multiple lines if the Rent account is used more than once on the Initial Charges template.

### **BACS/Cheques**

Change to prevent Cash Book Receipts (CBR's) being included in the BACS and Cheques grid if the bank reference has been removed from the transaction.

#### **Tax Pending, Don't Raise Tax Transactions where Insufficient funds**

Resolved issue where calculation for the current tax balance was not rounding, which could result in a slightly higher bank balance and so not raise a valid tax transaction.

### **Version 2.1.0.1**

#### **Diary Projection Grid**

Rest of Month figure not showing correctly for December.

### **Version 2.1.0.0**

#### **Owner Payment Grid, Portfolio Reference Number**

Addition of a new column on the Owner Payment Grid, this will display the portfolio reference number for the Owner Group.

#### **Bank Reconciliation, Transaction Search**

Added search functionality to allow for transactions to be searched within bank reconciliation. A search box has been added; when a value has been searched all matching transactions will be displayed on screen.

#### **Payments (PLP) Grid, Balance and Float Amount**

Addition of two new columns to the Payments (PLP) grid. These need to be enabled via a parameter in Accounts Parameters.

- Column one will display the owner balance amount.
- Column two will display the owner group float amount.

#### **Statements to Multiple Email Addresses**

The ability to send statements to multiple email addresses during the statements process. On the communications screen within a contact, a new tick box has been added, to select the email addresses for which the statements will be sent to. Only those email addresses that have this box ticked will have the statements sent to them.

#### **View Account Details**

New User setting to allow users to see full account details with read only access.

#### **Default Fonts for Emails**

Ability to set a default font within Veco™ which can be applied to emails.

#### **Veco™ Estates New Releases**

#### **Year End**

A new process within Veco™ to close down and move onto a new year. This process will result in the following occurring.

- Move the Control Date on a year.
- Move the Year End Date on a year.

- Set the budgets for a year – If you add a budget to an estate where there is an existing budget you are prompted if you want to copy the existing budget. If yes then you are given the option to adjust the amounts for each account by a %.
- A Nominal Ledger transaction created to zero balance the income and expenditure for the year.
- Invoices sent via email to accountants (see below).

### **Invoices to Accountants**

As part of the Year End process, there is the ability to send invoices for Leaseholders and/or Freeholders to Accountants. Accountants will need to be setup in Veco™ as a related contact to either the Freeholder or Leaseholder. All invoices will be sent via email attachment in a zipped file format.

### **Invoice Apportionment**

The ability to apportion an invoice, this will allow a user to set this against a budget and a sub department within an estate.

### **Screen Access**

Screens within Veco™ can now be minimised so that users can navigate to other parts of the system if required. These screens are:

- Accounts Summary\_Statement
- Entering a manual transaction via the live transaction screen
- Email Works Order to supplier

### **Email from Notes**

When sending an email from the notes section of Veco™, the system will now pull through the contact records email address if one exists. If one does not exist, users will still be able to enter an address manually.

If emailing from property notes then the contact used will be the main owner contact. If emailing from the tenancy then the contact used will be the main tenant contact.

### **Bank Reconciliation Summary Report, Unreconciled Transactions**

A new summary report titled Unreconciled Transactions. This report will show all transactions that have not been reconciled in the Bank Reconciliation. The report will detail the date of the transaction and further information regarding the transaction.

### **Remittance Advice**

Remittance Advice's will now have the ability to display both a company name and an address title. This allows for the Remittance to be directed to a particular contact within a supplier.

### **Email and Print Demands**

A new option to email and print copy demand, when run from within Veco™. When selected, all those that can be sent by email will be sent. When the emails have been sent a PDF report will be produced which has all of the demands, which can then be printed.

### **Supplier Discounts on AdHoc Invoices**

When entering a supplier payment into Veco™ through Live Transactions, two further transactions will be created to take off the supplier discount.

### **Tenancies/Deals, Accounts Summary, Tenant**

Tenancy Client Bank is used as the main bank if one is set

### **Payments (PLP), Tenancy Department**

Tenancy Client Bank is used as the main bank if one is set

### **Offices, Office Manager**

Drop down not limited to users in the same office

### **Freeholder Statement**

Incorrect calculation of Arrears balance

### **Offers & Sales**

Error when emailing

### **Works Orders**

Added 'Tenant Completed' Job Status

### **Properties/Units, Brochure Categorising**

If Brochure Category is not set in numeric order, Veco™ will warn the user but will not prevent saving

## **Version 2.0.9.2**

### **Raise Invoices (PLI)**

Will no longer make the Schedule Inactive if the last schedule line is raised

### **Ownership**

Added 'Don't use Faster Payment' field

### **BACS/Cheques**

For BACS there is a Faster Payment column which will create 2 BACS files if there is a mix of Faster and Non-faster payments

### **FixFlo Import**

Added a parameter to see if the User should default to the Property Manager

### **Negotiator Workspace, Sales**

Prospect Properties don't show if a future Next Contact date exists.

### **Import Receipts**

Bug with random halt of processing

## **Version 2.0.9.1**

### **Tenancy Transfers**

Addition of a Tenancy Client Account on the tenancy record and the available balance in this account in the Tenancy Department will get paid out and then into the Landlords client account via CBP and SLP.

## **Version 2.0.9.0**



### **Import Receipts**

If a Carriage Return Line Feed had been included in the stored Standing Order reference it wouldn't match

### **Negotiator Work Screen, Mass SMS**

Was not being linked to User setting

### **Bank Reconciliation, Closing Balance on Statement**

This could be changed accidentally by using the mouse wheel, this has been prevented

### **Bank Reconciliation, Unselect All**

This would only untick where they had been ticked when the form was opened

### **Tenancies/Deals, Tenants**

Missing OfficeFK not an issue if not by region

### **Power Grids**

Error on refresh

### **Properties/Units, Archive**

Only Freeholder department Schedule Charges were being made inactive

### **Owner Groups, Add Owner**

Error message "Conversion failed when converting from a character string to uniqueidentifier"

### **Contacts, Email**

SMTP is not attaching the Email in the Note

### **Properties/Units & Contacts**

When changing portfolio/company the Category list was being added to again each change

### **Appointments, Recurrence**

If you changed the time of the recurrence it was not updating the recurring appointments.

### **Properties/Units, Upload Documents**

URL's not enforcing correct numbering

### **Properties/Units, Upload Documents**

Remove button also applies to URL

### **Tenancies/Deals, Renewals Clerk**

If changed the appoint also takes the office of the Clerk

### **Properties/Units, Map**

Was showing as a grey block

### **Negotiator Workspace, M/As**

Not showing on popup grid

### **Repairs Grid, User List**

If a user is Locked then they weren't showing

### **Bank Reconciliation**

Where CBTs no longer show if both sides have the same account number & sort code if they are the same AccountFK they will be automatically reconciled on finalisation

### **Future Period SLIs**

Added a parameter to prevent allocating against SLIs in a future accounting period

### **Payments (PLP), Accounting Period**

Doesn't show period of actual date if it is the last day of the month and not the Default Accounting Period

### **Demand Generator**

If either Estate or Freeholder department there is the option to Preview the demands when processing

### **Licensing Schemes**

- Added new grid to show license schemes setup
- Added setup screen to allow for new schemes to be created
- When adding new scheme, prompt displayed to allow for users to select to update all existing properties
- New tab on properties screen 'License Schemes' displaying all schemes for the property
- Prompt upon opening a property advising it falls under a license scheme

### **Statements, Accountant Statements**

Emailed were also being included in bulk print PDF

### **Mail Merge, RTF**

Save As not working

### **Transactions, Admin Accounts Edit**

Validation was preventing previous period dated transactions

### **Owner Payments**

Added parameter to use Payee Name in description

### **Tenancy Offers**

Added new screen to enter tenancy offers

### **Print Statement Invoices**

Expanded out the types of attachments that can be printed

### **Upload & Download TDS Certificates**

Error if data includes '&'

### **Properties & Units**

Brochure Category – Ability to categorise photos in a different order to the upload, for use in marketing material and brochures.

### **Notes**

When printing text was wrapping so being cut off

### **Negotiator Work Screen, Email Error**

The warning message box was hidden behind the processing window

### **Import Receipts**

Duplicate posting Date & Time on allocations

### **Contacts, Other Names**

If changed, was not updating any Owner Group salutations to match

### **Encrypted Passwords**

Additional security and encryption added to the passwords.

### **Sales Milestones**

Added Due Dates & Sales Milestones grid

### **FixFlo V2**

Addition of the following features when using Fixflo

- Automatic setting of Property Manager against the repair
- Automatic message to Property Manager to inform of new issue
- Automatic message to Office Manager if repair has not been viewed within a user defined time period

### **FixFlo Scheduler Application**

A new application which allows users to setup a schedule for importing issues into Veco™. A directory folder will need to be installed on the server which contains the application.

Upon launching the application the following will need to be entered.

- User clicks the add company button. User will be required to enter the database details, including the user id and password.
- After entering database details, users will be required to select the relevant company from a drop down list, based on the company's setup in the database.
- Once this has been set a new row will be displayed on screen, users can then select the second tab at the top titled 'Schedule'
- User id and password of the machine needs to be entered along with the start in path. This will be the same path as the Veco™ shortcut. This can be found by right clicking on the Veco™ icon and selecting properties.
- User can then define the schedule: when the schedule will start, the timings and the frequency of the schedule. Once all have been set, user will be required to click the generate schedule button. This will then set the schedule.

## **Version 2.0.8.3**

### **Properties/Units, OS Property**

Additional columns added to New Let grid:

- Purchase Price
- Offer Accepted Date
- Buyer
- Sales Source
- Conveyancers
- Exchange Date
- Fall Through Date
- Other Costs
- Capital Works Supplier
- Acquisition Costs

## **Version 2.0.8.2**

### **Bank Reconciliation**

Fills temp table with only current portfolio

### **Raise Charges (SLI)**

Incorrect PLIs being raised

### **Properties/Units, Suppliers & Units**

Suppliers not showing using find

### **Schedule Charges PLI**

Where Frequency is set to Annually the Start Date remains the same, not moved on by 1 year

### **Properties/Units, Copy Property**

Error when copying

### **Negotiator Work Screen, Quick Property Match**

Not returning any matches

### **Negotiator Work Screen, Refresh**

Applicants grid is not reflecting Applicant Office drop down

### **Tenancies/deals, Renewal Clerk**

If the User's name is changed it is not updating the Renewal Clerk

### **Repairs**

Adding a Property to a new repair works now

### **Applicants, Specific Forms**

Communications not showing when record is read only

### **Offers & Sales, Sales Status, Web Status**

Added label to inform that portals are also updated with the new web status

### **Owner Payments Grid**

When Filtering the Selected column an error is shown

#### **Account Validation**

Added proxy details where in use

#### **Users, Archiving, Appointments**

If the replacement user was in a different office the appointments weren't changed to that office

#### **Contacts Search**

Changed to not link to OfficeFK if not using Regional Access Only

#### **Sales Negotiator Workspace, Vendor Prospects**

Added Registering Office Name column to popup grid

#### **Tenancies/Deals**

SA System tab showing even when not using SA System

#### **Properties, Specific Forms**

Error uploading to portals for the first time

### **Version 2.0.8.1**

#### **Tax Pending**

Added parameter to calculate for Tax Landlords based on the Date Became Non Resident

#### **Payments (PLP), Tenancy Department**

Improved processing performance

#### **Raise Charges (SLI)**

Improved processing performance

#### **Negotiator Workspace**

- Added User setting to open on start up
- Added a static notes box
- Added a refresh button to the popup forms
- Added a prompt to see if an entered note/feedback should be saved when changing row, refreshing data or changing grid
- Vendor Prospects now have parameter settings to determine which applicant statuses should be included

#### **Negotiator Workspace, Sales**

- Added additional breakdowns for the Users office
- My M/As and My Viewings show only appointments dated today
- Added Sales Status, Responsibility Of and Marketing Office columns to the Properties popup grid
- Deals show all statuses selected in the parameter settings

#### **Owner Payments**

Unallocated Future monies was being counted twice

### **CBP Transactions**

Validation error 'must be a Bank' on saving when editing

### **Statements**

Unallocated SLRs being included in Tenancy Due balance calculation

### **Notes, Next Call Date**

For Lettings & Sales Properties & Applicants Parameters have been added to default this date to x days in the future for specified Note Types

### **Mail Merge Datasources, Tenancies and Main Contact**

Changed to use Additional Occupants table

### **Negotiator Work Screen**

Improved speed of loading Sales screen

### **Users**

Added Admin Accounts User setting

### **Joint Applicants**

Added Main Contact tick  
Added Parameter to hide all but the Main Contact in Applicant grids

### **Active Applicants Grids**

Added Joined With to give a count of how many other applicants the applicant is joined with

### **Century 21 Statement**

Error calculating B/F & C/F balances over different date ranges

### **Properties/Units, Marketing Descriptions**

Added Strapline fields

### **Properties/Units**

Increased the number of upload photos from 20 to 25

### **Emailing**

Errors are now logged and in mass emailing the process continues to the next unless there is a timeout error

### **Tenancies/Deals, Initial Charges**

Displays Service Provided, Rental Amount and Rental Frequency and shows a list & percentage of Lettings and Managements fees from the Agreed Fees

### **Owner Groups, Ownership**

Users with only Add Account Details can now enter Bank Account details where they are not set

## **Tax Transactions**

A prompt now shows if the added transaction will increase the Tax Liability greater than the bank balance

## **Repairs**

Important Notes tab now shows

## **Available Lettings Properties Grid**

Shows the current status after the Property short address

## **Version 2.0.7.8**

**Statements** – Corrected timeout issues when getting tenant data.

## **Version 2.0.7.7**

**Tenancy/Deals, Legal** - Added

### **Global Calendar**

Changed to Global User & added Global Contact and Global Property search tabs

## **Version 2.0.7.6**

### **Remote App**

Added user setting so if user uses the Remote App it applies a fix for popup controls

### **Power Grids, Bulk Invoices**

Added option to take Supplier & Invoice number from the grid  
Added parameter to apply Supplier Discount to PLI

### **Offers & Sales**

Bug Read Only not working if another user has the record open

### **Tenancies/Deals**

Added HD Rates tab

### **Import Receipts Grid**

Added Sub Department column & import field

### **Diary Dates Grid**

Create View now working

### **Users**

Added Notes & Important Notes tabs

### **Offices**

Added Notes & Important Notes tabs

### **Users, Archiving**

Was not moving Works Orders where Works Order status was 'Works Order'

### **Calendar**

Bug where User was being used instead of Office

### **Power Grids, Mail Merge**

Can print where no email  
Email was BCC when Outlook was used  
Increased Timeout

### **Printing Grids**

Bug due to new Dairy Dates grid

### **Statements**

Bug with Tax calculation for Archived Owner Groups

### **Regional Access Only**

Added limit by Office Region to all search forms

### **Ad Hoc Fees**

Now starts as blank and validates a values has been entered and no longer restricted to Manager

### **Tenancies/Deals, Van Mildert**

Bug filling in Mobile number

### **Bacs/Cheques**

Added new Coutts import file

### **Freeholder Statement**

Balances not being calculated correctly

### **Owner Income & Expense Grid**

Added parameter to run by date range rather than periods

### **Works Orders**

Added Photos tab

### **Repairs**

Added Photos tab

### **Repairs Grid, Import from FixFlo**

Photos are now imported

### **Works Orders**

Added User setting to suppress the Repair Change status prompt

### **Works Orders**

Added parameter to complete the Repair once all linked Works Orders are either Completed or Cancelled

## **Version 2.0.7.4**

### **Users**

Error when saving new



### Version 2.0.7.3

#### Tenancies/Deals, Legal Insurance

If not allowed to edit and you tick and untick it will now set and then unset the RLP Supplier & RLP Commences fields

#### Office Security

Changes made to allow for offices to be ring-fenced.

#### Diary Dates

Changed to improve memory usage & release

### Version 2.0.7.2

#### Supplier Contacts

Non-grouped payments field not being saved

#### Power Grids, Refresh

Corrected error 'expected a non-empty string for the source table name'.

#### Users, Department

Changing department not prompting Form Access update.

#### Sub Agent Fee, Fixed Amount

PLI Invoice Status is now fixed to 'Pay In Full'. Cannot use 'Allow Pat Payment'.

#### Properties, Units

Fixed form layout so Key Date fields show correctly

#### Note Tabs, Attachments

Filtering on Blanks and Non-blanks now works correctly

#### Office, Add New

Error 'Conversion failed when converting from a character string to uniqueidentifier'

### Version 2.0.7.1

#### Properties/Units, Upload Documents

Brochures can now either be a file or a URL which must also have a description

#### CBR Transactions

Corrected error when editing/saving.

#### Contacts, Additional Details, Visa Check Date

Added a Parameter to determine who the key date is linked to - Property Manager, Tenancy Responsibility Of or Renewal Clerk.

This is now enabled for Related Contacts linked to an Active Tenant of an Active Tenancy

### **Tenancies/Deals, Deposit Details, Deposit Release Date**

Added a Parameter to determin who the key date is linked to - Property Manager, Tenancy Responsibility Of or Renewal Clerk.

### **Tenancies/Deals**

On opening of the form if any Active Tenant of any related contact has an expired Visa Check Date then a prompt will list them.

### **Tenancies/Deals, Other Details**

- Added a Parameter to only allow General & Accounts Departments to edit RLP. Automatically set details.
- Added a Parameter to automatically set the RLP Supplier
- Added a Parameter to automatically set the RLP Commences
- Changes to the RLP fields are logged

### **Available Sales Properties Grids**

0 Bedrooms now showing as Studio.

### **Attributes**

Removing All was not being saved

### **Users**

Added parameter to allow the setting up of User templates based on department.

### **Contacts, Supplier Details**

Added Used By field

## **Version 2.0.7.0**

### **Chart of Accounts**

Added Reserve Account tick box to the Bank Details section to indicate that the bank account is a reserve sub-account.

### **Reserve Accounts**

Can only be selected in Estate Reserve Accounts and in CBT transactions. They cannot be reconciled or processed in BACS/Cheques.

### **Bank Reconciliation**

Where both bank accounts in a CBT transaction have the same sortcode/account number the transaction will not appear in the bank rec. This transaction would indicate a movement of funds to a reserve account rather than a physical movement of funds between bank accounts.

### **SLR Transaction**

Corrected error when saving in Quick Monies

### **Notes Grids**

Added column to indicate if the note has an attachment.

## Version 2.0.6.9

### Sales Progression

Now complies with the user 'Region Access Only'.

### Estate Budgets

Property Percentages now correctly use Budget Unit Name.

### Email Validation

Now checks for addresses beginning with @

### Transaction Sub-Dept

Changing sub-department no longer unreconciles the transaction.

### Properties/Units – Lettings

Added Attributes field

### Applicants

Added Attributes field, and Use Attributes for Match tick box

### Suitable Properties, Normal Grid, Multiple Viewing

A Viewing column now appears

### Suitable Sales Applicants

Added Selling Position column

### Demand Generator, Estate

Added Budget Unit Name to Budget Report datasource

## Version 2.0.6.8

### Tenancies/Deals

Corrected error setting status to Active if property has Detectors.

Corrected error setting status to Active if property has Legionella Assessment date by expiry parameter value is null

When a tenancy is extended any fixed amount PLI schedules are checked to make sure they have a new charge line.

### Discounts (PLR)

VAT amount is now stored if relevant.

### Mydeposits

Joint Tenants not showing

### Offers & Sales – Mail Merge

Added joint applicants to mail merge datasource.

### **Properties & Units - Features**

These can now be fixed by types rather than free text.

### **Properties - Detectors**

Corrected bug with empty drop-down for detectors.

## **Version 2.0.6.7**

### **Transactions**

Ensure internal bank field BankFK is updated if the bank account is changed.

### **Fees Received Grid**

Ensure grid is filled if first grid visited.

### **Works Orders**

Corrected error when opening Estate works order.

### **Works Orders, Supplier**

When typing to search for a Supplier - ensure Regional Suppliers are taken into account.

### **Draft Transactions**

Correct error when moving draft transactions to suspense.

### **Tenancies/Deals, Deposit Details**

Added Deposit Release Date key date field

### **Contacts, Additional Details, Government Compliance**

Added Visa Check Date key date field, enabled if contact is in an Active or 'Under Negotiation' tenancy.

### **Properties/Units**

Added Attributes for Lettings Marketing Details

Moved Financial Details section to the Accounts Summary tab

Added Legionella Assessment tick box field which when ticked enables the Legionella Assessment key date.

Added Selective Licencing tick box field which when ticked enables the Licence Expiry key date. If expired will show a prompt on Priority form load and prevent Tenancy from becoming Active

Added Detectors tab

Once a Detector has been added the new Detector Check Date key date is available

### **Parameters**

Added Legionella Expiry parameter which if set determines when the Property Legionella Assessment key date has expired and will show a prompt on the load of the Property and prevent a Tenancy becoming Active

Added Detector Expiry parameter which if set determines when the Property Detector Check Date key date has expired and will show a prompt on the load of the Property and prevent Tenancy from becoming Active

## **Version 2.0.6.6**

### **Accounts, Bank Accounts**

It is now possible to specific an individual 'Unknown Receipts' nominal account for each Bank account.

### **Draft Transactions Grid**

When moving transactions to Unknown Receipts will use Account settings before using the default Parameter.

### **Office Details**

Added Default Client A/C field

### **Default Bank**

Where Office is selected and Default Client A/C is set then this is used before the Default Bank

## **Version 2.0.6.5**

### **Mail Merge**

Corrected an error when merging.

## **Version 2.0.6.4**

### **Office Emails**

Added additional office email addresses.

### **SMTP 'From' Address**

Added User option to have email From Address dynamically based on Office of who is being emailed

### **Quick Sales Applicant**

Re-sized form to fit under 768 pixel height

## **Version 2.0.6.3**

### **Rich-Text Marketing Descriptions**

Added spell-checking.

### **Sales Applicants**

Added Buyer field which if ticked does not validate Matching criteria

### **Sales Applicant Grid**

Added Buyer field

### **Sales Progression Grid**

Added Building name to property address

### **Regional Letters & Reports**

Added parameter so when templates are saved they are stored against the User's office and when processing only those with no Office set or the same Region as the User's Office are listed. This does not apply to Head Office.

### **Works Orders**

Added parameter so that only Suppliers for the same Office Region as the selected Property's Managing Office Region

### **Properties, Adding Photos**

It is now possible to select multiple photos

### **Quick Applicant & MA Forms, Search**

If using Regional Access only then only Contacts in the same Office Region as the User's are returned

### **Mail Merge, Additional Fields, Office Details**

Added additional field of Link to Office to Mail Merge template which points to an OfficePK field in the datasource which is used to get the Office details instead of the User's

## **Version 2.0.6.2**

### **My Deposits**

Corrected issue with creating My Deposits file.

### **Statements**

Added ability to process expenditure transactions (PLI/PLN)

## **Version 2.0.6.1**

### **HTML Emails**

Corrected issue where attachments from previous email were being retained..

## Version 2.0.6.0

### New Features/Major Improvements

---

#### Statement Processing

The Statement routine has been re-programmed to give substantial improved processing times especially on systems when large numbers of statements are prepared.

#### Quick Applicants

The layout of the Quick Applicant forms can now be customised by moving, adding, and removing fields, including custom fields. This can be carried out by your System Administrator. Please note that, similar to other customisable forms, the layout will revert to a default format following an update.

#### Customisable text in HTML emails

Report templates can be configured to allow for customisable text to be entered at the point of sending the email. After matching, chose a template, a box is displayed to allow a manual message to be entered.

Configuration of HTML templates:

For a Report embedded as HTML  
Define a parameter called pCustomText  
Set the default for pCustomText to the text in the first label of the report  
Set the value of the first label of the report to pCustomText

For a HTML Template  
Put the tags <div id="customtext"> and </div id="customtext"> around the first paragraph in the HTML template

### Grid Changes

---

#### Power Grids

Corrected issue with error when run from Negotiator Workscreen.

#### Tenancy/Deals – Balances

- Added Tenancy Deposit Scheme fields to grid.
- Added Occupied Date and End Type columns.

#### Tax Return

Grid can now be processed by Accounting Periods rather than transaction date.

#### Draft Transactions

Added Owner Group reference field.

#### Fees Received

Added Account Period column and can now filter by Accounting Period From/To

### Improvements / Bug Fixes

---

#### Note Tabs – Document Preview

It is now possible to select and email up to 20 attachments.

## **Reports Grid**

Corrected issue where report was showing even if not selected for user department.

## **Tenancy/Deals**

- Added missing Break Clause values.
- Management Department users included in Sold By list
- When Ticked you must also enter RLP Commences and Sold By
- Added Parameters to not allow the RLP Commences date to be in a closed Accounting period
- When Unticked added parameter to set the RLP Supplier
- When Unticked RLP Cancellation Date and RLP Cancellation Reason must be entered
- If the Renewals Clerk is changed the Renewals appointment Office was being set to the Office of the Renewals Clerk

## **Property/Units**

- Changing the assigned Property Manager now doesn't update key appointments if the appointment is also linked to a tenancy.
- If the Managing Office is changed key tenancy appointments are not updated.

## **Developments/Plot**

- Corrected error if plot name changed.
- Corrected error when saving Marketing descriptions.

## **User Details**

Added Owner Group Financial Details parameter to allow access to Financial Details section even if Accounts Details cannot be accessed.

## **Freeholder – Scheduled Charges**

Corrected error when entering % amount.

## **Quick Monies – Deposit Return**

The End Type is now also set to No Dispute if it was previously Periodic

## **Schedule Charges, Fixed PLI**

Added the option to 'Always Charge the Full Fixed Amount' for tenancy charges.

## **Freeholder Payments**

Reversed transactions were being included in calculation of Unallocated balance

## **Mail Merge Templates**

If user only has Open Form Access rights the template is now opened as 'read only'.

## **Owner Group – Address Title**

If the Other Names is changed on the Contact it was not updating the Owner Group

## **Transaction Department**

Changing the department on a transaction did not change the Analysis.

## **Calendar**



- Added a right-click option to allow Save Layout.
- Corrected issue when updating date range not selecting up to end of the last day.

### **Quick Applicants**

Added shortcuts AltGr+E (Lettings) and AltGr+A (Sales)

### **Suitable Match Buttons**

Added a parameter to disable Suitable Applicants and Suitable Properties buttons on contacts.

### **Suitable Applicant Matching**

It is now possible to send HTML emails.

## Version 2.0.5.0

### Grid Changes

---

#### Fees Received Grids

Split Acquisition column into Owner Acquisition and Property Acquisition

#### Tenancies Grid

Added Schedule Charge (PLI) column and made Schedule Charge only show true if it is an SLI charge

#### Properties/Units, Tenancies Grid

Added Schedule Charge (PLI) column and made Schedule Charge only show true if it is an SLI charge

### Improvements / Bug Fixes

---

#### Properties/Units, Photos

Resized temp display photo

#### Appointments

Viewing Arrangements not being picked up.

#### Schedule Charges, PLI, Fixed Amount

Not taking the end date of the Tenancy into account correctly when creating new lines.

#### Accountant Statements

Corrected error when processing Accountant statements 'Incorrect syntax near Inner'.

#### Parameters, Email Drafts

Errors if template contains an apostrophe

#### Mail Merge, Master Template

When deleting a Mail Merge template the Letter record was not being deleted from the other databases

#### Statements

Added Office Name, Office Address Line, Office Address, Office Phone Number & Office Email Address fields

#### HTML Bulk Email

Now works for both Negotiator work screen and Suitable Properties. The datasource must not contain a WHERE clause with {PropertyID}

#### Owner Groups

Added parameter to Lcok Salutaion field

The Owner field which displays the % split is updated if the Owner Contact name changes

### **Contacts**

Added a parameter to prevent asking if you want to create an 100% owned Owner Group

### **Parameters**

Added fields to allow if Admin and Manager users can change the Property Fee description fields

### **Appointments**

Bug where Key Dates could be ticked as completed if Feedback was entered

### **Repairs**

Added separate field to show text of Note selected in grid

Added a Parameter to make the User mandatory

### **Works Orders, Repair Notes**

Now shows the User that logged the Repair Note

### **Office**

Renamed TDS Branch ID field to TDS/Other Branch ID

### **MyDeposits Upload**

Changed the file created to use the Office TDS/Other Branch ID for the Branch reference field

## **Version 2.0.4.8**

### **Property/Units – Photos**

Corrected 'Out of Memory' error

## **Version 2.0.4.7**

### **Offers & Sales**

Corrected error when adding new offer

### **Contacts**

Corrected error when adding Company Contact with Attention Of.

## **Version 2.0.4.6**

### **Emails**

Corrected issue with & character when converting RTF to HTML

## **Version 2.0.4.5**

### **Offers & Sales**

Removed Add Joint Applicant prompt when adding applicants

Changed Minimum Fee % to Minimum Fee

Mail Merge – Vendors email is no longer in the To address field by default

Added field for Yield

### **Properties/Units – Photos**

Corrected memory error when adding large images where Categorise Photo parameter is set.

### **Applicants**

Added a database parameter to change form headings and group/tab headings from 'Applicant' to something else eg 'Agent'

### **Communications**

Added Unique Email tick box

### **Internet Browser**

Corrected issue with "The Hub" not loading.

## Version 2.0.4.4

### Additional Functionality to Existing Features

---

#### Appointment Feedback

Added a new parameter to allow the selection of which appointment types must have feedback.

### Grid Changes

---

#### Sales Progression

Date filter can now be blank

#### Properties (No Owner) Grid

Added Lettings Asking Price and Sales Asking Price columns

#### Properties

Added Last Contact and Next Contact fields

### Improvements / Bug Fixes

---

#### Payments (PLP)

Corrected an error when processing Sub-Agent fees.

#### Sales Quick Match

Corrected a problem where matching didn't work if Area Groups were selected.

#### Calendar

Moving outside the default date range now loads any missing appointments,

#### Salutation

Changing contact salutation now automatically updates Owner Group, Tenancy, or Joint Applicant Group salutation.

#### Offers & Sales – Various Changes

- The Chain Status of the offer record is now changed
- Added Minimum Fee %
- Added Minimum Fee % to sales data source
- Mail Merge to email – now all offer contact email addresses are available
- Added End of Chain tick box to Chain Details to indicate no further chain
- When the Sales Status changes you are now prompted to untick 'On the Market'
- Removed prompt for 'Add Joint Applicant'
- Added 'Offer Failed' status which replaces the Rejected status in causing the offer to be locked
- Offer form is no longer modal

#### Sales Progression

Offer Status and Offer Amount now show when adding new Progress notes

### **Appointment - Viewings**

Lettings and Sales Viewing Arrangement fields are now pulled into the appointment

### **Property Details**

Added Last Contact and Next Contact fields to marketing details. These fields are updated when entering Notes.

### **Contacts - Joint Applicants**

- Added Lettings and Sales columns
- Added button to 'Unjoin' applicants
- Marketing details of any joint applicants are updated automatically when updating any applicant

### **Contact Details**

Added fields: Visa Required, Visa Expiry Date, and Visa Type

## Version 2.0.4.0

### New Features/Major Improvements

---

#### Negotiator Workspace

This new feature improves on the existing Negotiator Dashboard and can be used as a “To Do” list providing the sales or letting negotiator with centralised access to their main areas of operation.

Negotiator Workspace is available from the Marketing tree menu, and can be also accessed by using keyboard shortcuts:

CTRL+ALT+S (or ALTGR+S) for the Sales Workspace  
CTRL+ALT+L (or ALTGR+L) for the Lettings Workspace

The facilities provided for sales negotiators are:

To Do -	Customisable “To Do” lists (summaries and detail)
Diaries -	Pop-Up Diary/Calendar
Workscreen -	Access to the Sales Workscreen
Dashboard -	Access to Sales Negotiator Dashboard
Properties -	Available Sales Properties Grid
My Deals -	Offers and Sales Progression
Statistics -	Sales Statistics

The facilities provided for lettings negotiators are:

To Do -	Customisable “To Do” lists (summaries and detail)
Diaries -	Pop-Up Diary/Calendar
Workscreen -	Access to the Lettings Workscreen
Dashboard -	Access to Lettings Negotiator Dashboard
Properties -	Available Lettings Properties Grid
My Deals -	Tenancies/Deals Grid
Statistics -	Lettings Statistics

The “To Do” lists provides a summary of Applicants, Properties, Diaries, and Deals, which are based on statuses. The relevant statuses you might wish to provide on the Workspace Summary can be configure via the “Admin:Templates:Workspace Parameters” menu option.

Clicking on any of the values displayed in the To Do Summary will display a grid of details. These grids provide access to the most relevant information, and further record information can be accessed by double-clicking on records, and by using the right-click menu options.

#### Rightmove Real-Time Data Feed (RTDF)

Over the coming few weeks customers who upload data to Rightmove via our PortalPal service will be switched over to the new Real-Time Data Feed. This operates as follows:

- Customers who currently upload to Rightmove via a 2 hourly feed will be migrated branch by branch to the new RTDF over the next month.
- Each migration should be done early in the morning simultaneously turning off the old feed for the branch(s) involved.
- We will run a process every 5 minutes (TBC) which looks for updated properties intended for Rightmove and processes them.
- If the update is successful the property information should be shown on Rightmove within seconds of us processing.
- If the update is not successful then the user will be informed of the failure via email and so will the support team (via The Hub, not currently in place).

## **Additional Functionality to Existing Features**

---

### **Notes – Last Contact Date (100752)**

Added a parameter to allow selection of the note types that will automatically update the Last Contact Date.

## **Grid Changes**

---

### **Owner Income**

Correct issue where selecting a “To Date” did not include transactions up to midnight on that date.

## **Improvements / Bug Fixes**

---

### **Property/Units – Notes**

Corrected issue with hidden Add Note button.

### **Notes**

Next Contact Date was disabled – now shows as relevant.

### **Owner Group – Category (100722)**

Tidied up operation of Landlord and Leaseholder categories:

- Landlord can be unticked if the owner group has no management properties or if Leaseholder is ticked.
- Leaseholder can be unticked if the owner group has no properties or if Landlord is ticked.
- At least one must be ticked if the Owner Group owns a property.

### **PortalPal Uploads**

Added “Responsibility Of” field to upload.

### **Fees Pending**

Corrected issue with using the calculated commission where there is pence different to the allocated amount.

### **Transactions – PLI (100801)**

Reversing a transaction now allows the invoice number to be re-used.



## Version 2.0.3.0

### New Features/Major Improvements

---

#### Joint Applicants (Version 1)

A new feature has been added to allow the creation of “Joint Applicants”. When adding an applicant (sales or lettings) via the Quick Applicant form a new button will appear, after adding the first applicant, to allow the addition of other applicants. The applicants added this way become “joined”.

Joint Applicants details will appear whenever an applicant form is opened.

When an applicant becomes a tenant on a tenancy, or an applicant on a sales offer, any joint applicants can be added to the tenancy or offer.

On the Active Applicant grids joint applicants are highlighted.

On the Sales Progression Grid joint applicant names are added to the Applicant column.

Further enhancements to this new feature will be added in later updates.

### Additional Functionality to Existing Features

---

#### Notes Sub-Type (100854)

Added a parameter to make notes sub-type mandatory.

#### Sales Properties (100867)

Added tab for price changes.

#### Listed Properties (100728)

Added field to show if property is listed. If so, the EPC date is exempt.

#### Receipts (SLP) (100949)

It is now possible to select which bank account the receipt should be posted to for all departments not just Estate.

#### Properties/Units – Marketing Options (100865)

Added additional marketing features:

- Property ‘Features’ have been increased to 20
- Added Area section to photos tab.

Upload additional details to PortalPal.

### Grid Changes

---

#### Diary Projection

Added Importance column to appointments grid. (100902)

Grid sort order and focused row are now remembered after opening an appointment. (100872)

#### Works Orders (100882)

Added Owner Group column.

#### **Tenants Grid**

Added occupation column.

#### **Sales Progression (100702)**

Added columns for vendor and applicant solicitors.

#### **Suitable Properties Matching (100858)**

Added option to view property photos.

#### **Leaseholder Contacts (100703)**

Added leaseholder address.

#### **CNR Tax (100923)**

Added Marketing Office.

#### **Repairs Grid (100910)**

Allow for user names with apostrophe.

#### **Active Lettings Applicants**

Allow for area with apostrophe.

#### **Lettings Property Grid (100940)**

Prevent grid showing 'null' vacant flag.

#### **Lettings/Sales Properties (Basic) (100808)**

Now shows Buddy Properties

#### **Properties Grids – Viewings**

Now looks for the word Viewing in the appointment type.

---

### **Improvements / Bug Fixes**

---

#### **Demand Generator**

- The filter bar no longer disappears after generating demands.(100901)
- A message now appears confirm emails have been sent. (100822)
- The property address has been added to the email subject. (100783)

#### **New Appointment (100718)**

Reminder is not now completed automatically if parameter not set.

#### **While You Were Out (100869)**

Stop text appearing in blue.

#### **Sales Applicant Form (100784)**

Ensure existing contact is categorised as a Sales Applicant.

#### **Specific Property Forms (100710)**

Added spell checking to marketing descriptions.

#### **Tenancies/Deals (100828)**

When archiving a tenancy a prompt now appears to allow archiving of the tenant contact.

#### **Property Form (100908)**

Added count to dates tab.

#### **Works Order Email (100711)**

A message is now shown to confirm an email has been sent.

#### **Sales and Lettings M/A (100876)**

Corrected issue where you could not save the M/A if the contact had no address.

#### **Works Order Follow Up (100836)**

The Owner Group and Supplier are now added to the appointment.

#### **Repairs Form (100818)**

This form is no longer modal (ie can be minimised)

#### **Appointment Recurrences (100856)**

Deleting the original appointment now deletes the recurrences.

#### **Leaseholder Groups (100699)**

Added Arrears Flag field.

#### **Sales Applicants (100929)**

Sales applicants can now be archived when they have an active offer.

#### **Tenancies/Deals – Deposit Deduction (100927)**

The report now always shows even if there are no deductions.

#### **Transaction – Quick Pay (100917)**

A prompt is now shown if the PLI is on hold.

#### **Transaction – Invoice Number (100961)**

Corrected an issue where it was possible to enter the same invoice number if upper/lower case was mixed.

#### **Appointment – Types (100955)**

Added a parameter to prevent users creating appointments with Key Date types.

#### **Properties Bulk Email (100953)**

Added field options for [Salutation] and [Yours].

### **Sub-Agent Charges**

Corrected error if schedule had more than 20 lines raised.

### **Properties/Units**

Added a user parameter to allow a property to be saved without an owner.

### **Offers & Sales Chain**

Each property in the chain now has its own Status field.

### **Estate Budget**

Stop blank lines being added when switching between tabs.

### **Appointments – Viewings**

When selecting a property only available properties are returned if the appointment is a Viewing.

### **Transaction Contra (100988)**

SLN contras to SLI transactions now include the correct bank account.

### **Quick Sales Applicant**

Once saved can now add a Quick Sales M/A

### **Bulk Appointments**

Location is now saved.

### **Owner Groups – Salutation**

Salutation is now automatically completed when adding Owners and Quick Forms.

### **Tenancies/Deals – Salutation**

Salutation is now automatically completed when adding tenants.

### **Version 2.0.2.4**

#### **Estate Budget**

Width increased to cater for more than 500 units.

### **Version 2.0.2.3**

#### **FixFlo Service**

Implemented fix to allow for time offset of 1 hour.

### **Version 2.0.2.2**

#### **FixFlo Service**

Fixed issue limiting import of 10 issues.

#### **Mail Merge**

Corrected email addresses not being pulled through.

#### **Appointment**

Fixed error when Contact button is clicked.

### **Version 2.0.2.1**

#### **Tenancies/Deals**

Corrected error adding new tenancy.

## **Version 2.0.2.0**

### **New Features/Major Improvements**

---

#### **Power Grids**

It is now possible to create Bulk Works Orders from Power Grids.

### **Additional Functionality to Existing Features**

---

#### **Workflow**

Added the Document and Open Document columns.

#### **Quick Forms**

Field labels can now be customised.

#### **Appointments – Contact Search**

Contacts can now be searched by partial email address, first name, and telephone number.  
Archived contacts are highlighted.

#### **Offers & Sales**

Solicitors are now automatically added as Related Contacts.

#### **Appointments – Audit Log**

The Audit Log is now available from the form.

#### **Contacts**

Added a parameter to automatically prompt for an email address when opening contact, where none exists.

#### **Quick Applicants Form**

Added parameters to allow certain fields to be marked as mandatory.

#### **Diary Dates**

Added separate parameters for Weeks Past and Weeks Future.

#### **Property – Gas Safety**

Added a parameter to set the default Gas Safety based on Service Provided.

#### **Owner Groups**

Added a parameter to specify the minimum possible Ownership % on new Owner Groups.

#### **Contacts**

Added parameter to set the minimum length of First Name.

Added parameter to enforce entry of First Name.

Added parameter to prevent invalid characters in the First Name.

### **Contact Salutations Parameters**

Added the ability to prevent changes to the “Yours” field.

### **Contacts**

Added “For Attention Of” field which can be used for Company contacts instead of the normal Title, Surname fields.

## **Grid Changes**

---

### **Suitable Properties**

Results can now be shown as a normal grid.

### **Tenancies**

Added Renewal Date column.

### **Negotiator Work Screen – Lettings**

Added Students column to Normal Properties Grid.

### **Diary Dates**

Added Tenancy Office and Marketing Office columns.

### **Lettings/Sales Property Grids**

Added right-click “New Appointment”.  
Added right-click “Suitable Applicants”.

### **CNR Tax**

Changed column heading Owner Country to Owner County

### **Estate Balances**

Now filtered by correct analysis department.

### **Properties/Units**

Added Gas Safety and Service Agreement fields.

## **Improvements / Bug Fixes**

---

### **Power Grids – Pivot**

The name of the power grid is now shown in the title.  
Corrected error when using the “Group By” command.

### **Notes Tab**

Does not now re-fill the grid and lose filtering.

### **Sales Properties**

Added Lease Expires (Year) field.

## **BACS Processing**

Bank of Scotland – removed 2 leading zeros from total.

## **Told & Sold**

Added menu option to new Specific Applicant and Owner forms.

## **Accounts Summary**

Date Order now consistent when changing filters.

## **Tenancies/Deals – Break Clause**

Added “Twenty-Eight” and “Thirty-Six” months.

## **Quick (Specific) Applicant Form**

Opening an existing contact now automatically sets the contact as an applicant if not already.

## **Repairs – Follow Up**

Changing the User on a repairs now changes the User on the appointment.

## **Keys**

The first key added is now ticked as the default. The default key cannot be unticked.

## **Property Photos**

Removing the EPC will now automatically update the portals.

## **Power Grids**

Added Refresh button.

## **Offers & Sales – Mail Merge**

Now allows Vendor email address.

## **Negotiator Work Screen**

Added Applicant Office menu drop-down.

Corrected odd options on help menu.

## **Property Management Centre**

Changing the office now automatically updated any future appointments to the same office.

## **Owner Groups**

Added “Address Title” field which is automatically completed according to the Contact Salutation parameters.

Added parameter to lock “Title” and “Yours” fields which update if the contact changes.

## **Tenancies/Deals**

Change the “Additional Occupiers” field into a grid.

Vacating Date is now updated when the Days field is changed.



Update TDS is now ticked when the Confirmed Date is entered to ensure an Extension is registered with TDS.

Added TLP Cancellation Date

The Amended By field is now updated when any Key Dates are changed.

Accounts Summary now shows correct Deposit Agreed.

Initial Charges – Renewals – added prompt to update renewal charges.

### **Draft SLP – Estate & Freeholder**

Now prompts to update the Import Reference.

### **Estate Budget**

Corrected bug when removing an account which always removed the last line.

### **Reports**

Corrected error on validation if report name duplicated.

### **Inter Account Transfer (CBT)**

Corrected issue where wrong description was appearing on the analysis.

### **Offers & Sales**

If a property's sales status is Completed you can now set an offer status to Rejected.

Added two new fields – Amount and % - which show the corresponding Sales Fee or Sales Fee % and automatically update if the Offer Amount changes.

### **Sales Negotiator Dashboard**

Corrected issue where "My Office Properties" was based on the Lettings Marketing Office rather than the Sales Marketing Office.

### **Sales Properties**

Only validates the Marketing fields if ticked as "On the Market".

### **Specific Applicants Form**

Added Related Contacts tab.

### **Contact Title**

Invalid "Title" in the database is now shown even though this may not be valid according to the Contact Title "Types".

### **Mail Merge Templates**

Data Source tree fields now quicker.

### **Custom Letter Data Sources**

Drop-down list of data source fields now fills quicker.

### **Appointment Attendees**

Corrected spelling mistake in form title.

### **Bank Reconciliation**

Transaction Batch grid can now be sorted.

Added totals for items ticked on the Statement Grid.

Automatically tick any batch where the balance is zero.

### **Import Receipts**

Correctly pick up account number if in the same field as sort code.

### **Offers & Sales - Notes**

Correct error when Follow Up Date entered.

### **Document Renaming**

Corrected issue where if the source folder only contained one document it was not being displayed.

## **Version 2.0.1.1**

### **CNR Tax – Mail Merge**

Now works with RTF to allow production of letters.

## **Version 2.0.1.0**

### **Estate - Calendar**

Fixed appointment locked message if there are reminders on appointments.

## **Version 2.0.0.9**

### **Statements**

Added Property Order field – by postcode and then address.

Corrected bug calculating Fees carried forward.

### **HTML Email Fields**

Added addition HTML Email Contact Fields:

LettingsAppResponsabilityOf  
LettingsAppROJobRole  
LettingsAppRODirectDial  
LettingsAppROEmail  
LettingsAppROMobile  
LettingsAppROTelephone  
LettingsAppROOfficeName  
LettingsAppROOfficeTelephone

## **Version 2.0.0.8**

### **HTML Templates**

Introduced new templates for HTML emailing.

## **Version 2.0.0.7**

### **Negotiator Work Screen**

Correct issue with wrong property when double-clicking.

### **Properties/Units**

Correct Upload Buddy Office error

### **Pivot Power Grids**

Corrected problem where fields not always showing

Hide Totals on setup not saving

### **Estate Reports**

Correct Debtors Report issue where multiple records showing

### **Summary Balances Grid**

Increased Timeout

### **Main Grid**

Take into account any Timeout parameter.

### **Tenancies/Deals**

Added "Renewal Date" and "Renewal Clerk" fields

### **Office Hierarchy**

Added "Renewals Office" column

## **Version 2.0.0.6**

### **FTP Control**

Check for version of Windows before using specific FTP control.

## **Version 2.0.0.5**

### **Statements**

Correct error with missing column TenancyPK

## **Version 2.0.0.4**

### **Quick Owner & Property**

Prevent clicking New Record after save

### **Quick M/A**

Prevent clicking New Record after save

### **Appointments, Feedback**

Investigated Out of Memory error if huge amount of text entered

### **Demand Generator, Invoice Number**

Correct numbering issue where SLN present

### **Invoice Generator, Invoice Number**

Correct numbering issue where PLN present

### **Demand Generator, Estate Department**

Removed Description column

#### **Demand Generator**

Bug where if more than 1 demand per Contacts then blank demands would be produced

#### **Invoice Generator**

If not using the Defer & Split Invoices parameter then pdfs with the same name can be produced

#### **Pivot Power Grid**

Added second data field

#### **Auto Allocate (SLP)**

Changed the posting time of the Allocation so it only increases by 1 sec per SLP being processed, it resets to current for the next SLP

#### **Statements**

Split Tenancy Balances out to improve performance

#### **Windows 8.1 FTP (Portal Pal) Bug**

Now using a different FTP control

### **Version 2.0.0.3**

#### **Quick Applicant Forms**

Corrected Search fields overlapping

### **Version 2.0.0.2**

#### **Properties/Units**

Properties/Units, Photos - Bug, double clicking on an image didn't show the picture Grids,

#### **Grid Filtering**

Filter Bar - No longer highlighted

#### **Notes**

Notes, Bug - If important Notes is open on load going straight to Notes does not fill grid

#### **Applicant Form**

Now request Next Contact date to be updated

#### **Quick Sales Applicant**

Added Applicant Status field

### **Sales Offers**

Amounts/budget should not now show decimals

### **Basic HMO**

If ticked HMO Expiry Date now not required

### **Lettings Properties**

Validation on Marketing now looks for status beginning with

### **Available Property**

Market Appraisal field now clear on form load

### **Tenant Contact**

Fixed bug where Tenant tab would not show even if Tenant Category was ticked

### **Property Details**

Asking Price - Validation error if no price entered

### **Calendar**

Setting 'Show Time As' to 'Out Of Office' no longer tick Not Attending

The 'Show Time As' reflects on appointments in the Users Calendar

### **Negotiator Dashboard**

Error loading Leader Board

### **Tenancies/Deals, Protection Details**

Added User Parameter to allow access where not General or Accounts department

### **Suitable Applicants**

Added Record Count

### **Quick Sales Applicant**

Added Selling Position and Buying Position fields

### **Statements**

Attachments not sending on Final Statements

### **Diary Appointments**

Now updates the Amended By and Amended Date fields

### **Contact Salutation**

On open salutation re-sets to selected default

### **Fees Pending**

Error where the SLR has a To Date

### **Active Applicants Grid**

Added Save/Load selection function

### **Document Renamer**

Changed PDF viewer

### **Note - Document Preview**

Corrected problem with more than 5 documents selected

### **Statements**

Corrected error if more than 1 Accountant

### **Portal Pal**

Uploads Fee Description & Weblink fields

### **Owner Payments**

Refresh - Loads Owner payments even if you have selected Freeholder department

### **Freeholder Payments**

Percentage not showing Decimal Places

### **Freeholder Statement**

Float no longer taken into account

### **Leaseholder Statement**

Department not set by default so statements come out blank

### **Communications**

Mobile 1 is checked as default otherwise the first in the list

## **Statements**

Corrected bug in the calculation of Total Fees Carried Forward

## **Applicant Form**

Added Matching History tab

## **CRM Contact Details**

Added Notes field

## **CRM Contacts Grid**

Added Notes Column

## **Owner Contact**

Clicking x on the Notes tab removes it

## **Properties Photos**

Specific Property Forms, Photos - Not validating Categorisation numbering .  
Auto Categorising of photos was not ignoring no photos, EPC and Map.

## **FixFlo**

Created integration to the FixFlo service for creating repairs.

## **TDS Certificates**

When uploading tenancy details to TDS it is now possible to download the certificates and have them automatically attached to tenancy details.

## **PDF Generation**

Added a new Splitter & Merger to correct issues with Windows 8.

## **Version 2.0.0.1**

## **Communications**

Correct error if more than one Mobile number entered.

## **Quick Applicant Forms**

Correct layout – search fields overlapping.



## Version 2.0.0.0

### New Features/Major Improvements

---

Version 2.0.0.0 introduces some major enhancements to the Veco products:

#### Development Tools

The development tools we use to program Veco have been upgraded to the latest versions. These bring a number of improvements and additional functionality we will be introducing in future updates.

#### Streamlined Forms

For users of the Negotiator Workscreen we have completely re-designed the Applicant, Property, and Owner forms to remove unnecessary fields and make it easier to access information you might need quickly. In User Details it is possible to select which users should access the streamlined forms.

#### Default Salutation Fields

To maintain data consistency a new feature has been added to allow the salutation fields ("File As", "Address Title", "Salutation") to be automatically set in a default format which can then not be changed by users. These settings can be configured in "Admin : General Parameters".

These default settings take effect for any new contacts or when changing the name/company name of existing contacts. Due to the complexity of deciding which defaults should be used, these settings do not retrospectively change all existing contacts.

#### Power Pivot Grids (100626)

A number of major improvements have been made to the Power Pivot Grid functionality:

- Option to pre-set up to 5 row fields.
- Options to hide or show Summary rows and columns so that Grand Totals can be shown or hidden.
- The ability to click on the Pivot Grid values to drill-down to the data that makes up the value.
- The ability to change and save the style conditions to allow certain values to be highlighted.

#### Power Grids / Dashboard (Beta)

Added enhancements to the Power Grid facility, including the ability to show multiple Power Grids and Charts on a user "Dashboard".

The Dashboard can be configured from the "Admin" menu and accessed from the main top menu bar.

#### Negotiator Dashboards

"At a Glance" dashboards have been introduced for both Sales and Lettings negotiators. Available from the Marketing tree options (or from the "MyVeco" toolbar), these screens show the negotiator's applicants, properties, "To Do" list, and negotiator Leaderboard (if used). Details can be accessed by double-clicking, and from right-click options.

#### Improved Grid Functionality

Remove Grid Items - It is now possible to temporarily remove rows from grids by pressing Delete. This is useful if you do not wish to process all items on a grid.

“Save Selection” and “Load Selection” – It is now possible to be working through a grid, save the items on the grid, go away and do something else, and then come back to the original grid and re-load the previous items to prevent having to re-filter.

## **Additional Functionality to Existing Features**

---

### **RTF Mail Merge Templates**

Added additional options to include Picture and Text Box fields in the mail merge templates.

### **Scheduled Fees**

Added the ability to create a scheduled charge for fees where the fee is a percentage of the rent due. The fee invoice (PLI) is then created at the same time as the rent charge (SLI) is raised.

### **Fees Pending**

When fees are processed by the Fees Pending grid the Date From/To fields of the PLI transaction are automatically set to the earliest/latest dates taken from the rent demands.

### **CRM Contacts (100659, 100660, 100661)**

- Added the ability to select up to 5 “Responsibility Of” names.
- Added, “Priority” field, and the ability to select multiple “Portfolio” fields.

### **Tenancy – Tenants (100636)**

It is now possible to add the same contact again as a Tenant on a Tenancy as long as the Move Out/In dates do not overlap.

### **Transaction Changes (100632)**

Added a new feature to log all transaction changes.

### **Office Details - Emails (100671)**

Added 4 additional email addresses, which can be used by AutoMate to make it easier to send copies of reports.

### **Office Details – Bank Account (100672)**

Added bank account details to be used in mail merge documents.

### **Tenancy Details (100670)**

Added “Deposit Provider” column to show if the tenant has a related contact coded as a “Deposit Provider”.

### **Archived Records**

It is now possible to set a parameter so that archived records are highlighted in a specific colour on main grids.

## **Grid Changes**

---

### **Landlord Group (100674)**

Added Statement Narrative field

### **Estate (100654)**

The user "View All Offices for Region" parameter is now checked.

### **Demand Generator (100650)**

The transaction description has been added to this grid so that only specific types of charge can be processed. eg Ground Rent, or Insurance.

### **Estate (100649)**

Added Inspection Date and Fire Safety Date to Estate grid.

### **Fees Forecast (100645)**

Added VAT and Gross fields to all Net amounts.

### **Payments PLP (100646)**

The double-click option to open Owner Group details for "Owner" department transactions now works for the other departments.

### **Property Viewings (100644)**

The viewings available from property grids do not now include any cancelled appointments.

### **Accounts Summary Statement (100666)**

Transaction Date From/To dates are now available in this grid.

### **Suitable Applicants (100638)**

Added Applicant Type field to the Suitable Applicants grid.

### **Tenancies/Deals**

Added a column to indicate if the tenancy has a deposit provider. The communication details also shows deposit provider communications.

### **Fees Pending**

Corrected a slight issue where fees could be missed.

### **Available Properties**

Increased the length of the address popup time from 2 to 5 seconds.

### **Available Properties – Viewings (100687)**

Sorting by the date column now works correctly.

### **Fees Received Grids**

Net and VAT totals are now shown when grouping.

### **Key Log (100667)**

Added a right-click option to open Supplier and Owner Group, and to see Supplier communications details.

### **Suitable Properties (100680)**

Added a right-click option to show Viewing Arrangements.

### **Applicants / Suitable Applicants**

Added mouse hover to show additional negotiators and number of offers.

## **Improvements / Bug Fixes**

---

### **Scheduled Charges (100635)**

Corrected an issue where it was possible to change a charge from Fixed Amount to a Percentage after the schedule had commenced.

### **Estate Creditors Report (100631)**

Corrected an issue where a supplier with an outstanding balance was not showing on the report if there was no transaction movement in the selected period.

### **Freeholder Payments Grid (100630)**

Freeholder payments processed via the Owner Payments Grid are now calculated per Estate so that they correctly show on Freeholder Statements, which are also per Estate.

### **Centralised Mail Merge Templates**

Corrected an issue where documents in the master fo0lder were not being checked for duplicate names.

### **Estate Works Order (100656)**

When creating an invoice transaction (PLI) from the Works Order the Freeholder details are not entered correctly.

### **Credit Note SLN (100655)**

When posting an SLN Estate transaction if the Property is selected first the Bank is not saved in the transaction causing the transaction not to appear on some reports. This has now been fixed.

### **Estate Processing (100642)**

Selecting an Estate for accounts processing now automatically unselects the previous selection.

### **Estate Processing (100643)**

The ability to select a single Estate for accounts processing has now be extended to the Extend the BACS and Bank Reconciliation processes - so that only bank accounts relevant to the selected Estate are shown.

### **Demand Emails (100640)**

When sending demands by email it is now possible to attach additional documents.

### **Bank Reconciliation Sorting (100634)**

It is now possible to use the grid sort facility on the bank reconciliation.

### **Estate Debtors Report (100617)**

The Leaseholder (Owner Group) title has now been added to the debtors report.

### **Property – Buddy Office (100676)**

Corrected an error when un-ticking a property.

### **Estate Key Dates**

Estate Key Dates can now be cleared.

### **'No Deposit' Tenancy (100669)**

Added the Tenancy 'No Deposit' option to Tenancy clauses.

### **Owner Group Details (100673)**

When adding a new property to an Owner Group the Main Office field of the Owner Group now defaults to the Property Marketing Office where there is one and to the Management Office if there isn't.

### **Owner Contact**

Changed field name "Email Statement" to "Email Statement/Demand". This field now controls the emailing of Leaseholder Service Charge demands as well as Owner Statements.

### **Tenancy – Renewal Invoice (100648)**

Added Date From/To fields which can be used on the renewal invoice.

### **Views – Current User**

Corrected an issue where a Current User containing an apostrophe did not show correctly.

### **Calendar – Show As (100683)**

Corrected problem with the appointment "Show As" setting not being saved.

### **Estate Transactions (100639)**

Estate transactions can now be suppressed from the Account Summary statement. Suppressed transaction will not appear on Leaseholder Statements.

### **Appointment Follow Ups (100637)**

Corrected an issue where an appointment follow-up was not pulling through the contact/property/tenancy details from the original appointment.

### **Statement Invoices (100412)**

Statement Invoices are now processed in the same order as Statements.

### **Owner Group Portfolio Reference (100558)**

The Owner Group Portfolio Reference is now included in mail merge data sources.

### **Adding Appointments (100682)**

When adding a contact to an appointment the contact can now be searched by email address.

### **Supplier Discounts (100681)**

Where an invoice transaction (PLI) has been posted with the breakdown of VAT the discount % is applied to the net value to create a credit note (PLN). This PLN now correctly applies VAT at the same rate as shown on the PLI.

### **Matching Range**

Split the match range into Applicant and Property.

### **Property Searching**

When entering an address to be searched all words split by a space will be searched.

### **Offers & Sales**

The solicitor details are now entered automatically if the applicant or vendor has a 'Solicitor' as a related contact.

### **Property Photos**

- A default property photo type has been added.
- When photos are added they can now be categorised automatically.
- Added a parameter to load photos as a resized temp image to improve memory use.

### **Power Grids**

Changed the way Drop Down lists of data source fields are filled to just get the structure of the query.

### **Quick Sales MA**

Property Drop downs not sorted in alphabetical order.

### **Quick Owner & Property (100688)**

When adding a property where there is an existing owner the option is given to add the property to the existing owner group.

### **Mail Merge**

Improved the method of merging documents into the Tenancy Agreement.

### **Suitable Applicants/Properties**

Form is no longer "modal" – other forms can be opened on top.

### **RTF Mail Merge**

Corrected an issue where Clauses would only merge the first of more than one field.

### **Withdrawn Tenancies**

Withdrawn tenancies cannot now be selected when entering Works Orders and Transactions.

### **Quick Monies (100467)**

Rent Receipts now take account of the "Days Delay" parameter.

### **Temp Files (100647)**

Temporary files create by Veco are now stored in the user temp folder.

### **Supplier Balance Statement (100665)**

This now shows the Works Order reference.

### **Works Orders (100668)**

The Notes tab is now unlocked after saving the Works Order.

When creating a transaction a prompt is now given to allow a Repair to be marked as Completed.

### **Calendar Appointments (100675)**

When marking an appointment as Cancelled (or deleted) any attendee is now notified.

### **Negotiator Work Screens**

Added label to show if Sales or Lettings.

### **Quick Applicant Forms (100433)**

Added the ability to send SMS and emails.

### **Bank of Scotland BACS Format (100433)**

Added the ability to produce BACS files in the BOS format.

### **Bulk Email (100677)**

Bulk emails now create a Note.

### **Adding Tenant from Tenancy (100689)**

Adding a new Tenant contact direct from the Tenancy form now automatically sets the tenant status correctly.

### **Property/Estate Utilities/Suppliers (100690)**

Hovering the mouse over a Supplier now shows the supplier notes.

### **Repairs (100691)**

It is now possible to add documents and Important Notes to a Repairs record.

### **Calendar (100692)**

The Appointment Sub-Type is now shown on the calendar.

It is also possible to select a Calendar specifically for "Lettings" and "Sales" departments which are defined as any department containing the words "Lettings" or "Sales".

### **Property/Estate Works Order tab (100695)**

The Works Order Reference is now shown.

### **Department Parameter (100696)**

A parameter has been added to allow a default Department to be set for Accounts grids.

## **Version 1.5.0.0**

### **New Features**

---

This version contains very specific accounting features for handling deferred income and expenditure, with the ability to produce Income & Expenditure and Balance Sheet reports. This would mostly be useful for those companies who manage their own property portfolios, and for estate management.

For further details see the update notes:

<http://www.veco-online.com/veco/pdfs/Veco Update 1500.pdf>