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: 2.3.0.7 – July 2022

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.

There may be two or more setup windows with each needing to be completed in full.

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

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 2.3.0.7 – July 2022

Updates and New Features

2FA Configuration option for Veco Portal

When 2FA has been activated in the Veco Portal there are now options available to revoke access tokens from the Contact form ribbon where a token has been granted.

Text Anywhere Integration Update

Integration updated to support new connection methods

Updated Update Process for Eventing

Update to the update process when eventing fields/columns/tables already exist.

Fixes

Delay when clicking Send on SMTP emails from 64bit version

Resolved.

Searching for an email address in 'CC' and 'BCC' box return incorrect results

Resolved.

Error when emailing estate invoices to accountant at Year End

Resolved.

Case Management form locking the application

Resolved.

Initial Landlord Invoice saving with wrong filename

Resolved.

Missing note type for Income & Expenditure

Resolved.

Actual Bank Balance on Owner Group Account Balances grid not calculating correctly.

Resolved.

Mark as incorrect not available on Case notes

Resolved.

Attaching AML document to contact not displaying correctly

Resolved.

Version 2.3.0.5 – May 2022

Updates and New Features

Review and Update fields for Material Information Disclosure – Part A

The following fields are now available to be uploaded as a part of the property portal feeds:

Tenure

- Freehold, leasehold or commonhold
- For leasehold properties: information on the ground rent, service charges and length of lease

Council Tax

- Bands to be included for England, Wales and Scotland (rates for Northern Ireland)

Price

- Lettings properties to include the monthly rent and deposit payable
- Properties for sale to include the property price
- Shared Ownership properties to include details of the percentage share being sold and the rental cost for the remaining share.

Please speak to your CRM contact at Eurolink for details.

Fixes

Calendar view hiding Key Date and Completed appointments for 'All' users

Resolved.

Type and Department dropdown no longer filter main calendar

Resolved.

Statement Type no longer pre-populates on Owner Group

Resolved.

Long log in time when no internet connection

Resolved.

Adding/removing appointment recurrences not displaying/being removed.

Resolved.

Version 2.3.0.4 – May 2022

Updates and New Features

New field for what3words

New field added to record what3words reference on the property form. This field can be added to data sources so it can be displayed on reports and marketing material. Please speak to your CRM contact at Eurolink for details.

Fixes

When setting a Tenancy to 'Archived', the 'Live' tick box was unselected.

Resolved.

When opening a works order from a repair, the Repair Status will blank out.

Resolved.

When setting the Job Status on a works order to Completed, the status will blank out on saving.

Resolved.

Error when selecting more than one office on Tenancy Find window

Resolved.

The deposit no longer shows as 'Deposit Agreed' if the tenancy is marked as periodic and the vacating date is passed.

Resolved.

Error when sending emails with attachments

Resolved.

If all rows in the rent schedules have been generated, a new row was not being added to the schedule when you added an extension date and new vacating date.

Resolved.

Eventing errors saving Property and Tenancy Forms

Resolved.

Fixflo token field locked

Resolved.

Available date not showing on the Neg Screen on the Lettings Negotiator Work Space

Resolved.

Overdue supplier key dates do not complete on archiving

Resolved.

Appointments with attendees not showing under their name on the main office calendar on Day View

Resolved.

Error on the Normal View on the Neg Screen on the Lettings and Sales Negotiator Work Space

Resolved.

Version 2.3.0.0 – April 2022

Updates and New Features

New fields available on Leaseholder Statement

The leaseholder statement can now display the Bank Name, Account Name, Sort Coe and Account Number.

Ability to select Sub Departments specific to an Estate

We have added a Sub Departments tab the Estate record. You can select which Sub Departments are available to the estate and only these will be available on budgets and transactions for that estate.

Ability to link a Sub Department to an Estate Works Order

You can now select a sub department on an estate works order. The sub department will be carried through to the invoice when created.

Printed Supplier Remittance now saved as a note

When print is selected for a Supplier Remittance it is now attached as a note to the Supplier record.

Fixflo Professional Integration

We have added a new integration with Fixflo Professional. For more details please speak to your CRM contact at Eurolink.

Viewing Confirmation Email Template

We have added the ability to send appointment confirmation emails from the Appointment form. A template for this can be set in the General Parameters -> Emails & SMS Drafts tab. Each email can be edited by the user before sending.

Recording a reason when a property is withdrawn from the market

We have added a field to record why a property is withdrawn from the market which will save to the notes.

Tenancy Progression Documents now linked to Tenancy

When creating a Tenancy record from a Tenancy Progression record the notes and attachments will from the Tenancy Progression record will now be linked to the Tenancy record.

Cases linked to Estate Records

You can now create a Case record and link it to an estate.

Ability to add room dimensions to portal feeds

Room dimensions recorded in Veco can now be added to portal feeds (availability subject to the feed format).

Access to the Draft Transaction grid

The Draft Transaction grid is no longer locked when a user is accessing it. Only the transaction the user has opened is locked.

Outstanding Purchase Transaction Grid now includes Invoice Number

The Outstanding Purchase Transaction Grid now includes a column for Invoice Number.

Metre reading fields available on Supplier and Utilities Records

We have added the ability to record metre readings on the Supplier and Utilities records linked to Property and Estate records.

Detectors records have linked Key Date Reminders

Detectors expiry dates now have linked Key Date Reminders that will be displayed in the Property Managers calendar.

Legal field added to Estate Properties

We have added a Legal field to Estate Property records that when selected will display a warning when opening the property. You can continue to post charges to the account however demands will no longer be sent for this property.

Fixflo Basic Authentication Update

We have updated the authentication method when using the Fixflo basic integration.

Council Tax fields available on Lettings and Sales Marketing Details

We have added Council Tax Band fields to the Lettings and Sales Marketing forms.

Owner Group reference added to Statement Note Type

The Owner Group reference has been added to Statement Note Type created when processing statements. This is for statements created moving forward, historic records will not be updated.

Royal Bank of Scotland BACS file format updated

The format of the file has now been updated.

Estates Compliance and Estate Management Requirements

We have added a Compliance tab on the estate form. This gives the user the ability to record compliance items, their category, the interval, last check date, note, action required, next check date and status. We have also added a Compliance Checklist node to the tree under the Estates node to display these details for all estates in one grid.

Update to Key Management feature

We have added a refresh button and the colour logic has been updated to the following:

- If none of the keys on the hook are booked out, the hook shows as **green**.
- If all keys on the hook are booked out, the hook shows as **orange**.
- If some of the keys on the hook are booked out then the hook shows as **yellow**.
- If the key set is marked as 'No Longer Held', then the key hook shows as **grey**.

Delete budget option on Estate

We have added Delete Button for estate budgets which is enabled if the user has update rights and he start date is in the future.

Fixes

Defects Fixes

Tick boxes on Property -> Appliances tab not staying ticked

Resolved.

Boiler service date on Estate form not saving

Resolved.

Date on the Property -> Appliances tab not saving

Resolved.

Imports Receipts process matching with Archived Estate Properties

Resolved.

Decimal place missing on tenancy progression form offer amount

Resolved.

Row highlight on Receipts SLP grid and Accounts Summary not displaying correctly

Resolved.

Invoice Generator performance Improvements

Resolved.

Error when setting/clearing the Renewal Date – key date not being created

Resolved.

Owner group account balances grid is not displaying correct balances

Resolved.

Window resize/close buttons on Pivot Grids not available

Resolved.

When emailing from the Owner Groups grid the email isn’t saving

Resolved.

Error when adding/changing the extension date

Resolved.

Refresh button does not update 'Unallocated' column on the Estate Debtors Account Summary grid

Resolved.

Web status being set without mandatory field being completed

Resolved.

Error on Tenancies Balances grid

Resolved.

Lettings M/A quick form not creating appointment

Resolved.

Health & Safety notes on Estate Works Order not copied to the instructions

Resolved

Adding first CRM Type category

Resolved.

Error when opening an existing contact from a quick form

Resolved.

Important Notes inherited from previously opened property when adding new property

Resolved.

Selecting Save and New on the user form will open a new record. When you close that record and try and re-open the original user record again it says you already have it open when it's not

Resolved.

The 'Copy Charge' function on the scheduled charge form will only copy the charge across to the units if there doesn't already exist another charge against the same department

Resolved.

When the Lettings MA and Sales MA quick forms are used to registered a new property, with an existing owner, the existing Email and Mobile comms against the contact will be duplicated upon saving

Resolved.

Inconsistent discount being applied for suppliers

Resolved.

Payments PLP grid not processing when balances available

Resolved.

Tasks grid displaying data from multiple portfolios

Resolved.

"Payee name must be entered" pop up box displaying when not required

Resolved.

Quick Pay doesn't copy across sub department onto PLP

Resolved.

The CTRL+P keyboard shortcut to print doesn't function until you click once inside the preview window

Resolved.

When previewing statements, the 'Selected' row filter will be cleared when exiting the preview window

Resolved.

Spaces aren't removed from telephone numbers when searching via Global Search

Resolved.

Workspace calendar filters not applied correctly

Resolved.

When copying/pasting text into the email window, the font appears to revert to Times New Roman

Resolved.

Where a user signature exists that contains HTML coding, the new email window will revert to a double-spaced line formatting

Resolved.

Users no longer able to be able to right-click on the generated map / epc and save this out to another location.

Resolved.

When a contact is anonymised it is not removed from the portal users table

Resolved.

On the detectors tab, there is no ability to remove one if you add in error or it is no longer needed.

Resolved.

Tenancy Progression grid displaying records with the status “Completed” and “Accepted”

Resolved.

Images being auto-rotating when adding to a property record

Resolved.

The option to change the user's password via the User -> User Details menu option bypasses the password validation that would usually occur if Increased Security is enabled

Resolved.

Error opening General Parameters

Resolved.

Calendar entry not showing in attendee's column

Resolved.

Clean Up Duplicate Contact Error

Resolved.

On the quick applicant forms, when a telephone number or name is entered for the applicant, the system does not remove the spaces before performing the match to existing records.

Resolved.

Property Match Error

Resolved.

Freeholder PLIs are not being paid even though available funds are available

Resolved.

Error using the Freeholder Fees Pending grid

Resolved.

Editing of Records using the mouse scroll

Resolved.

Performance improvement to open transactions from Draft transactions and Live transactions

Resolved.

When emailing contacts from a powergrid if you include hyperlinks within the body of the email, these will be stripped out of the resulting email sent out to the recipients

Resolved.

Completing repairs via Draft Transactions not displaying

Resolved.

Error when setting/updating Deposit Release Date

Resolved.

Error when adding works order from repair record

Resolved.

Version 2.2.8.6 – November 2021

Please be aware that there will be 2 setup windows to process with this update, as there is an introduction of a 64 bit version of Veco as well as the usual 32 bit version. The second setup window will appear after the first has completed and both must be processed and completed.

Please also note that as there are 2 separate setups to be processed, the download and install wait times may be slightly increased on previous updates, so please be patient while waiting for the updates to finish downloading and while waiting for the setup windows to appear.

Updates and New Features

Created a parameter that allows the Property Manager field on the Property Record to be optional.

Selecting this field in General Parameters will allow the Property Manager to no longer be a mandatory field.

The ability to create and monitor Payment Plans in Veco.

We have developed a feature that will allow you to create and monitor a payment plan without affecting the transactional posting in Veco. For more details please speak to your Account Manager.

The create date now shows on the Appointment Form.

You can now see when the appointment was created in the Appointment Form.

Add Important Notes to Case Management Form.

Important notes are now available on the Case Management Form

'My Deals' has been updated to display when you’re the progressor or the negotiator.

When viewing ‘My Deals’ in the Negotiator Work Space the default view will show deal where you are either the negotiator or the progressor.

Created a user setting to control who can Delete Views.

A user setting has been added to control who can delete views.

Default SMS communication type.

When sending SMS messages, the form now populates with the mobile number by default. The default is set to Mobile 1 however this can be amended to the required mobile number for each message.

The Confirmed Status is now displayed on Calendar View.

The confirmed status from the appointment is now displayed on the calendar view.

Added Contact Ref to CNR Tax grid.

The Contact reference is now displayed on the CNR Tax Grid.

Edit Agreed Fees permissions extended to the Property record.

The user permission for adding and editing agreed fees now also applies to the Property form.

Added a field to record UPRN on the Property Record.

Field added to store the UPRN on the Property form.

Update to EPC requirements.

It is no longer mandatory for both Energy and Environmental ratings to be entered. If only the Energy rating is entered the generated graph will only display the energy rating.

Update to Sub Type field on a Property Form

You can now remove Sub Type Value on an Appointment Form.

Parameter to disable missing BACS detail warning on save of contact.

We have added an option in general parameters to disable to the missing BACS details message on the contact form.

User Setting to update Arrears Flag of the tenancy.

A user setting has been added to control who update the Arrears flag on the Tenancy Form.

Update to the Notes Grid.

The notes grid only looks back over the last 7 days. There is now an advance search option to be able to look up specific notes.

Added user validation to adding and amending bank details.

Added a parameter that restricts the user who added bank details to associated contacts to not be able to set the tenancy to active.

The News Feed now shows the users office details by default.

The News feed on the Negotiator Work Space is now defaulted to the user's office details. This can be amended on request. Please speak to your account manager for details.

Negotiator Work Space Calendar user view.

The Calendar in the Negotiator Work Space has been updated to allow the user to select specific user's calendars to view.

Amending user on note follow ups.

You can now set a note follow up for a different user so that it appears in their diary projection.

The Property Reference has been added to display in Property Look up.

When searching for a Property to add to an appointment the reference will now be shown in the results.

User setting to update Web Status.

Added an additional user setting to control who can set the Web Status.

Zero Deposit Scheme Details.

Added the ability to record details of the Zero Deposit protection scheme.

Custom fields added to Case Management Form

Custom fields have been added to the Case Management Form

Update to Agreed Fee on the Tenancy Form

Agreed fees on the tenancy now auto updated on create of a new tenancy record

Editing Appointment Outcomes.

Ability to edit appointment outcomes on completed appointments.

Sending a Supplier Remittance to an Account email address.

You can now add an “Accounts” email address to a supplier to send a supplier remittance to.

Created functionality to integrate with FixFlo Pro.

For more details please speak to your Account Manager.

Electric Expiry Date mandatory before setting a tenancy to active.

We have updated the business logic so that you must have a valid Electric Expiry Date to be able to set a tenancy to active.

Update brochures on portals on price change.

Functionality to allow you to publish updated brochures to portals on price change.

Room dimensions added the portal feeds.

Room dimension have been added to the feeds available to be uploaded to portals.

Enhanced functionality to refund (SLR) funds directly from Unknow Receipts

You can now refund (SLR) funds directly from the Unknown Receipts grid. The additional feature will allow you to identify unknown funds and allocate a refund in the same process.

Enhanced functionality to refund supplier discounts from suspense account.

We have added an option to refund a supplier discount back to supplier.

Additional parameter to prevent removing an owner group on a sales property.

We have added a parameter which will prevent the user from removing the Owner Group from a Sales property.

Voidlink Incoming Tenancy Opt Out field added to tenancy

We have added a field for clients using the Voidlink service for the incoming tenant to opt out of their details being shared to Scottish Power.

Voidlink Property Opt Out field

We have added a field for clients using the Voidlink service so that the property can be opted out.

Tenancy offer tab moved on the full property form.

We have moved the Tenancy Offer tab on the property form further to the left for ease of access.

Fixes

User Details - Open any User form, click “Save & New” – that user is now locked and cannot be opened again until next log in.

Resolved.

Anonymised ex-tenants - standing order reference isn't set to NULL.

Resolved.

Reinstated drag and drop attachments on email window.

Resolved.

Tenancy Calendar - browser pane defaults to Jan 2007

Resolved to now be today’s date.

Emailing from any contacts grids, if you perform the right-click > 'New Email Message' action, this doesn't save a note against the contact to say that an email has been sent.

Resolved.

When creating a new estate budget by copying the existing budget, the From Date that is inserted by Veco for 1st July as 07/01/2020 (American style date), but after budget was created, the date is correct.

Resolved.

Workspace Dashboard Calendar: Updated to only load records for current 7 days forward.

Resolved.

Error saving recurring appointment.

Resolved.

Creating a tenancy without tenants.

Resolved.

Updated ribbon on Dashboards.

Resolved.

Version 2.2.2.0 - August 2020

Updates and New Features

Neg Work Space (Sales and Lettings) Dashboard Widgets

The dashboard on the Neg Work Space can now be customised using the toggles on the bottom right corner of the screen. These layouts will be saved for future access.

Property Service Provided Look Up

When changing the Property Service Provided field the system updates all the old tenancies to the current service provided. We have amended the functionality to only update the current tenancy.

Change "Unique Email" to "Portal Email"

The label on the communication form has been updated to display “Portal Email” however the functionality remains the same.

Display Property Notes on Owner Contact Notes grid

A parameter has been added that when selected will allow the user to see all property notes on the owner contact notes grid.

My Regional Offices

User setting added to allow the user to see data for selected offices rather than all offices in a region.

Multi property owner tick box

Self-updating tick box added to the Owner Contact grids. This will be updated to reflect if the contact is the main contact and is in two or more Owner Groups with active properties.

Display bank nominal in unknown receipts grid

The bank nominal is now available on the unknown receipts grid

Neg Work Space To Do List Record Filters

You can now filter your records on the To Do Lists by "My", “My Office", "My Region" and “All”

Veco Rooms Structure

Functionality added to allow room management by linked property records. For more details please speak to your Account Manager.

Neg Work Space To Do List ability to create Views

You can now create and run Views from the To Do List

Next Contact Date is now Lettings and Sales Contact Specific

You now have the ability to add default reminder options for both "Lettings Next Contact Date" and "Sales Next Contact Date" so they work independently of each other.

Landlord Payments CBR

You now have the ability to create scheduled “guaranteed” CBR on landlord accounts. For more details please speak to your Account Manager.

Told and Sold (Referral) Development

Told and Sold functionality has been enhanced to display on the specific records, you can record the status and value of the referral and you can link a property record. For more details please speak to your Account Manager.

Float retention when paying invoices

We have added a parameter that when selected will ignore the float retention value when there are PLI’s to be paid.

Self-Calculating Age Field

The contact now has a field that will calculate the contact age if the DOB field has a value.

Case Management

There is now the ability to add and manage case records on Veco. These cases can be linked to other records. For more details please speak to your Account Manager.

Custom Form Validation

Custom form validation can now be added to prompt the user when opening and saving records. Users can create their own SQL statements and messaging via the admin option in Veco. For more details please speak to your Account Manager.

Key Management

We have enhanced the existing key functionality to allow users to manage key boards and key hooks in the office. For more details please speak to your Account Manager.

EICR Regulations

We have added functionality which allows users to manage their EICR compliance. We have added an additional tab to the property form to manage the results of each EICR requirement including the ability to manage follow up appointments and business logic to not allow tenancies to be made LIVE when a requirement is outstanding. For more details please speak to your Account Manager.

Additional Field Added to Veco

Record	Field	Type
Property - Market Appraisal	Agent Valued	Currency
Property - Market Appraisal	Landlord Requested	Currency
Property - Market Appraisal	Marketed Price	Currency
Property - Lettings Marketing Details	Notice	Tick Box
Property - Lettings Marketing Details	Notice Date	Date
Property - Lettings Marketing Details	Reason for Withdrawal	Option Set
Property - Lettings Marketing Details	Property Vacant?	Tick Box
Property - Sales Marketing Details	Notice	Tick Box
Property - Sales Marketing Details	Notice Date	Date
Property - Sales Marketing Details	Reason for Withdrawal	Option Set
Property - Sales Marketing Details	Property Vacant?	Tick Box
Sales Offer/Sales Progression	Deposit Amount	Currency
Sales Offer/Sales Progression	Case Handler - Vendor Solicitor	String
Sales Offer/Sales Progression	Case Handler - Applicant Solicitor	String
Sales Offer/Sales Progression	Additional Survey	Tick Box
Sales Offer/Sales Progression	Additional Survey Type	Option Set
Sales Offer/Sales Progression	Additional Survey Type Date	Date
Sales Offer/Sales Progression	Surveyor	Look Up (Suppliers)
Sales Offer/Sales Progression	Additional survey completed	Tick Box
Sales Offer/Sales Progression	Qualified?	Tick Box
Sales Offer/Sales Progression	Qualified By?	Option Set (Staff List)
Sales Offer/Sales Progression	Qualified Date?	Date
Sales Applicant	Applicant Deposit Value	Currency

Fixes

Neg Work Space Bulk Report Email does not default the subject line text

Resolved

Duplicate Contact Clean Up had an issue where if the contact had more than one email address it removed both contacts

Resolved

Index was out of range error when closing forms

Resolved

Unhandled Exceptions on the calendar

Resolved

Emailing applicants from the Neg Screen had no attachments on emails
Resolved

'Viewing Arrangements' and 'Open Owner Group' options missing on the right-click on Neg Work Space.

Resolved

Email Window Locked when opened from right clicking on the communication details

Resolved

Repairs unread count in tree

Resolved

Sales and Lettings Neg Work Space refresh button not refreshing

Resolved

Specific Applicant Form added Alt + N for new note

Resolved

Break Clause 'Immediate' missing from Tenancy Agreement fields

Resolved

Typo on draft transactions grid

Resolved

Pie chart sections showing percentages incorrectly
Resolved

Adding photos to Estate works orders

Resolved

Create Appointment on Sales M/A form, the appointment creates with the 'Lettings M/A' type.

Resolved

Global Search returning multiple results for the same record

Resolved

Error when saving Sales M/A

Resolved

Neg Work Space: Sales and Lettings To Do List. Add ability to set grid as custom and department layout

Resolved

Emailing attachments from Document Preview the email window no longer shows the selected attachments being emailed on the email form before clicking Send

Resolved

CNR Reference on Owner Group not clearing

Resolved

Add Note button on property forms

Resolved

Email all Owners not attaching to notes

Resolved

"Today Only?" tick box on Diary Dates Grid causes Veco to freeze

Resolved

Error when removing Date From / Date To from a PLI

Resolved

Unknown Receipts unable to type some addresses in the property field on the transactions

Resolved

'New Email' to tenant contact from tenancy form not filling in email address

Resolved

Adding the same tenant contact twice to the same tenancy

Resolved

Anonymised applicants unable to set to archived

Resolved

Note logged from the right-click menu doesn't update Last Contact field

Resolved

Lettings/Sales MA communications appearing blank on final step

Resolved

Portal contact conflicts for Merge Contact function

Resolved

Movement ticked for Statements when transactions are reversed/deleted

Resolved

Reversing a CBT when Estate Account and Reserve account have the same details

Resolved

Importing Estate Receipts to selected bank account

Resolved

News Feed View on Neg Work Space

Resolved

Neg Work Space (Sales and Lettings) - Available Properties – unable to minimise function on the Map and Photos

Resolved

'Useful Information' tab missing from Property form

Resolved

Developments Form: Marketing Details button incorrect position on the form

Resolved

Select row in grid now highlighted to make it clearer when selected.

Resolved

Increase number of characters on mobile search to 5 (Quick Forms and Global search)

Resolved

Edit Log button missing from the transaction form

Resolved

Restricted Access missing

Resolved

Incorrect syntax error when adding new Property record

Resolved

To Do list missing record counts

Resolved

Quick Applicant forms has incorrect tabbing order

Resolved

Sales MA quick form unable to go back from the Confirm Details screen

Resolved

Rightmove Imported Leads Error

Resolved

EPC Rating "D" not displaying

Resolved

Mass Anonymisation password screen not displaying

Resolved

Email Statement / Demand tick box not set be default when using the Quick Lettings/Sales M/A or Quick Owner & Property forms

Resolved

Adding addresses on new quick forms when Postcode Anywhere is not in use was not allowing manual address entry

Resolved

Fixflo Account details not updating database correctly

Resolved

Quick Lettings / Sales Applicant form Follow Up Date dropdown not populating

Resolved

Amended bank account details access on a copied contact

Resolved

No full preview on mail merge

Resolved

Adding to the Quick Access Toolbar on forms not saving layout

Resolved

'Import TDS File' process changes to import file

Resolved

Sales Offer updates to property record not updating the amended by field

Resolved

Archived Tenants still able to be selected on a works order

Resolved

NLJ Transaction not allowing transfers between sub departments

Resolved

When Mail Merging from powergrid the process will run for all records shown (not just those that are ticked as selected). Users need to filter down to just those that are selected to only send to these records

Resolved

Error when assigning Appointment Colours

Resolved

Email not attaching to notes as the file name is too long

Resolved

Error when selecting an existing property on Sales M/A quick form

Resolved

New Quick Forms mark the Email method as the default rather than Mobile 1

Resolved

Map not displaying on property form

Resolved

Error editing 'Label Colour and Text'

Resolved

Invoice Generator assigning invoice numbers even when the report has an error.

Resolved

Invoice Generator not displaying PLN transactions as a Negative amount and adding themselves to the totals.

Resolved

Sales Offers updating both property Sales Status and Web Status

Resolved

Retry progress when uploading photos to portal

Resolved

Applicant to Property match displaying multiple records but only sending to one

Resolved

Incorrect notification style attached to Push Form

Resolved

Error completing sales offer if the buyer is a company

Resolved

Default Note type not selected on Sales and Lettings Neg Work Screen To Do List

Resolved

Error when adding a repair

Resolved

Error when emailing Images / HTML

Resolved

Leaseholder Statement not running/splitting

Resolved

Initial Charges print/email form layout not visible

Resolved

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 can 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 staring 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/Unites (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 gird 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 accidently 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 if 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 eith 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 Responsibilty 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 automaticaly 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 se 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 diplays 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 show be posted to for all departments not just Estate.

Properties/Units – Marketing Options (100865)

Added addition 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 correstponding 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.

P**DF 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 of 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 supressed from the Account Summary statement. Supressed 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