# 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: 2.0.8.1

## How to Install Updates

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

To install an update, follow these instructions:

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

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

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

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

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

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

Any new changes to your database will be automatically installed.

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

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

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

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

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

### Veco Replimate™

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

*Note*

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

*Important Note*

*From version 2.0.0.0 onwards Veco requires Microsoft .NET Framework 3.5 (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 2.0.8.1

**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.

**PDF Generation**

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

## Version 2.0.0.1

**Communications**

Correct error if more than one Mobile number entered.

**Quick Applicant Forms**

Correct layout – search fields overlapping.

# Version 2.0.0.0

## New Features/Major Improvements

Version 2.0.0.0 introduces some major enhancements to the Veco products:

**Development Tools**

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

**Streamlined Forms**

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

**Default Salutation Fields**

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

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

**Power Pivot Grids (100626)**

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

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

**Power Grids / Dashboard (Beta)**

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

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

**Negotiator Dashboards**

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

**Improved Grid Functionality**

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

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

## Additional Functionality to Existing Features

### RTF Mail Merge Templates

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

### Scheduled Fees

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

### Fees Pending

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

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

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

### Tenancy – Tenants (100636)

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

### Transaction Changes (100632)

Added a new feature to log all transaction changes.

### Office Details - Emails (100671)

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

### Office Details – Bank Account (100672)

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

### Tenancy Details (100670)

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

### Archived Records

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

## Grid Changes

### Landlord Group (100674)

Added Statement Narrative field

**Estate (100654)**

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

**Demand Generator (100650)**

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

**Estate (100649)**

Added Inspection Date and Fire Safety Date to Estate grid.

**Fees Forecast (100645)**

Added VAT and Gross fields to all Net amounts.

**Payments PLP (100646)**

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

**Property Viewings (100644)**

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

**Accounts Summary Statement (100666)**

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

**Suitable Applicants (100638)**

Added Applicant Type field to the Suitable Applicants grid.

**Tenancies/Deals**

Added a column to indicate 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