Veco Changes Document

Introduction

This document reflects all changes made to the “Veco” software and database.

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:

Version Number 1.1.3.0

Released on:

6th March 2009

How to Install Updates

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

To install an update, follow these instructions:

1. 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.

2. **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.**

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

4. “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.

5. Any new changes to your database will be automatically installed.

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

7. 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.

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

9. 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.

10. After updating each PC click “Help : About” to ensure you are running “**Version Number 1.1.3.0**” and “**Database Version 1.1.3.0**”.

<u>*Note*</u>

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.

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 1.1.3.0 (Released 6th March 2009)

Properties/Units - Appliances

Added the ability to select the preferred supplier who normally deals with each appliance.

When creating a works order for a preferred supplier the details of any appliances are pulled through to the instructions.

The supplier details are shown on the Asset Register.

Mail Merge

A new facility has been added to allow mail merge “prompts” to be defined. These prompts can then be dragged into letter templates as required. When a mail merge letter is run, the processing will stop to allow completion of the prompts.

In a batch of letters the same answers to prompts are used in every letter in the batch. In other words if a template has a series of prompts and a mail merge is run for 100 letters, the prompts only appear once not 100 times.

Workflow and Tasks

Added “Target Date” fields

Lettings Property Grid

Added Board Type

Company and Office Details

Added the ability to enter company and office header and footer logos. These are automatically uploaded to Portal Pal so that they can be included on any automated emails sent from “Veco Auto-Mate”.

Works Orders/PLI Invoices

Added an “Action” to open the matching PLI Invoice from a Works Order, and vice versa.

Transactions

Improved the “lookup” facility when selecting owner group, property, contact details, etc

The “Relates To” section does not now automatically close when the information has been entered. This is controlled by a new parameter.

Import Receipts / Credit Notes

Added the ability to include “Date From”, “Date To”, and “Description” fields in the import file. If “Date From/Date To” fields are used in the import file, the resulting SLP/SLN transaction will only match against transactions with the exact same “Date From/Date To” fields, otherwise the imported transaction will remain unallocated.

Supplier Grid

Added Insurance Renewal field

Workflow Grid

Added property details field for tenancy workflows

Chart of Accounts

Added fields to indicate whether nominal accounts should appear as positive or negative figures on either Income/Expense or Balance Sheet reports. These reports will be included on a later update.

These new fields are also shown on the “Transactions By Nominal” grid to allow them to be used for selection when exporting to Excel.
<u>Tenancy – Tenant Details</u>

Standing Order References must now be unique.

<u>Scheduled Charges</u>

Added a new frequency for “Two Monthly”

<u>Initial Tenancy Invoice</u>

Added fields for main applicant name and address

<u>Statements</u>

Added field for Statement Type to allow for filtering

Added field for Last Statement Date – this will allow the selection of interim statements based on when the owner last received a statement.

Added field for New Tenancy – this will allow interim (or draft) statements to only be selected for those owners where there has been a new tenancy in the same month.

Improved the speed of the grid, and the check for “Movement” on the account based on the last statement date.

When producing interim statements the system now allows statements to be either “Live” or “Draft”. Draft Statements can be used for checking transactions are correct. When a Live Interim Statement is processed the date is recorded and then end of month statements need only be processed where there has been movement since the last “Live Interim” statement.

<u>File Notes</u>

It is now possible to add a file note by using ALT+N shortcut

<u>Owner Groups</u>

Added field for “Terms Agreed”. This is also shown on the tenancy grid.

<u>Accounts Reports</u>

Added a new grid for “Estate Transactions By Nominal”. This allows the selection of transactions by selecting an estate and a date range. This will allow for the production of Income/Expense and Balance Sheet reports.

<u>Quick Monies</u>

PLI transactions can now be entered for a future date.

<u>Transaction Templates for Quick Monies</u>

It is now possible to define a specific supplier for any PLI/PLP transactions.

<u>Supplier Details</u>

To avoid selecting a supplier as “Default Supplier” by mistake, a warning is now shown if this box is ticked.

<u>Property Grids</u>

Added the ability to search for a property by entering a Key Reference.

Added a new grid showing “Properties with No Owners”. This will make it easier to find a property that has been added via Quick Forms, or imported, which would not yet have an Owner Group assigned.

Properties/Units – Document Distribution

Added the ability to categorise a document ready for uploading to portals.

Transaction Posting

“Days Delay” field is now only available for CBP and SLP transactions.

Lettings Window Card

Added the Window Description field

Contact/Owner Group Details Changes

Changes to account numbers are now hidden

Custom Fields

Corrected a problem with blanking out date fields

Draft Transactions Grid

Added a new column showing transaction status as either Draft or Incomplete. “Incomplete” items cannot be processed.

Rent/Service Charge Demand

Added Brought Forward and Balance Owing fields so that the demands can be used as a statement as well as an invoice.

Owner Group – Statement Narrative

Corrected a bug where the narrative could not be cleared.

Grid “Refresh” Button

Corrected a ‘conflict’ bug when two users refreshed to same grid at the same time (terminal server users only).

Properties/Units – Useful Information

Corrected a problem where opening a property in “Read Only” marked the Useful Information as “Read Only” for future properties.

Balances Grids

Removed automatic “Best Fit” option to try and speed up the grid over client/server connections.

Live/Draft Transactions Grids

When grouping, the total of the group is shown rather than the record count.

Logon Process

A new parameter has been added to speed up the logon process by ignoring the calendar.

Quick Forms

Corrected a problem where the “Rightmove Property Code” was not being set when creating a new property, and thus preventing the property from appearing on the property grids.

Accounts Summary

Reversed transaction now showing correct value in ‘Unallocated’ column.

Version 1.1.2.6

Properties/Units – Appliances

Corrected problem where records would appear to blank after saving multiple lines.

Version 1.1.2.5

Corrected bug with Owner Payments grid

Version 1.1.2.4

Corrected bug with Windows Search returning no results

Version 1.1.2.3

BACS/Cheques Routine – corrected problem with wrong dash sign used for sortcodes.

Version 1.1.2.2

Reports

Corrected error due to bug in DevExpress

Tenancies – Quick Monies

Corrected error with CBP insisting on a contact even if no amount entered.

Version 1.1.2.1

Corrected error when processing supplier cheques/BACS

Version 1.1.2.0 (Released 27th January 2009)

Payments (PLP)

Added supplier's Payment Priority field to allow invoices to be sorted/filtered by priority.

Key Date Reminders

When changing the parameter that sets the reminder date to be so many days before/after the diary event date, the system now automatically adjusts the existing diary appointments.

Properties/Units

The property Status now defaults to Active

When double-clicking on a photo box where the is no image a 'No Image' message is shown.

Gas tick field and Gas Expiry Date – these have been linked such that if there is no gas tick the expiry date cannot be entered. Likewise, if there is a date the tick cannot be removed without first clearing the date.

HMO tick box and HMO Expiry Date - these have been linked such that if there is no HMO tick the expiry date cannot be entered. Likewise, if there is a date the tick cannot be removed without first clearing the date.

Added a 'Fee %' field

Diary Dates Grid

Added property Vacant and Service Provided fields

Works Orders

A button has been added to allow the toggle between showing only preferred suppliers or all suppliers.

Corrected error 71 when e-mailing a works order

Transaction Office

The office on transactions is now set according to the following rules:

- If the transaction relates to a Tenancy – 'Tenancy Office'
- If the transaction relates to a Property – Either 'Management Centre' or 'Marketing Office' depending on a new Parameter setting under "Parameters : Accounts".
- If the transaction relates to an Estate – 'Estate Office'
- If none of the above – User Office of the user creating the transactions

Tree Access

Corrected a problem where some nodes where missing.

Auto-Allocate (SLP)

Corrected a problem where the commission and tax where not being calculated correctly.

Fee Received Grid

Added NET and VAT columns

Detail Changes

Changes to contact tax details and contact/owner group bank details are now logged and shown on a Details Changes sub-grid on the contact form.

All such changes are also shown on a general Detail Changes grid available from the 'Admin' tree node.

Diary Appointments

The 'Feedback' field is now secure. Any changes are recorded with a date/time stamp.

Corrected a bug if an apostrophe is entered in the Subject field.

The Subject field now defaults to the Type if left blank.

Suspense Accounts

Suspense accounts can now be defined. These are special Contacts and are defined from the 'Accounts Postings' menu.

To use this facility you will need to do two things:

1. Activate the menu option by updating Admin : Tree Access
2. Ensure users are allowed the relevant Form Access from each user details

Suspense accounts are essentially special types of Owner Group. Cash Book transactions (CBR and CBP) can be posted into suspense accounts, and the balances will appear on any grids showing Owner Group balances.

Grid Refreshing

A 'Refresh' button has been added to the grid facility to allow the information in the grid to be updated without having to exit the grid.

Diary Projection

The 'Overdue' column now excludes any tenancies what have ended.

Corrected a small bug with calculating the period dates.

BACS/Cheques Routine

Added a column showing the type of contact to allow for filtering.

Any account number less than 8 characters will now have a leading zero added. This is mainly to cope with imported or migrated details.

A duplicate BACS file is now created with a short filename to allow for 16-bit bank software. The name of this file is always VECO2BCS.TXT

Tax Details on Contacts/Owner Groups

Changes to any of the tax related dates will now automatically select the correct tax and NRL status flags. Also, these flags are automatically updated every day.

Performance Improvements

The following improvements have been made in regards to performance:

- Owner Group details - now open quicker
- Tenancies/Deals details - now open quicker
- Outstanding Sales Transactions grid – corrected timeout error

- Outstanding Purchase Transaction grid – corrected timeout error
- Website defined in parameters - can now be blank
- Website does not now stay ‘active’ in the background when changing to a different node
- Disabled Outlook – Direct Outlook integration has now been removed due to performance issues and incompatibility when running Microsoft Office on a terminal server with Exchange Server installed. Emails are still sent via Outlook and this does not affect the document search facililty.
- Calendar Reminders – now only your own reminders are processed. This should prevent a major performance issue during startup and when viewing the main calendar.
- Owner Payments – grid is not recalculated after processing selected owners.

<u>User Password Security</u>

An enhanced security facility has been added. This is set within Parameters and forces passwords to be a minimum of 6 characters and forces passwords to be changed every 30 days.

<u>Mail Merge</u>

Corrected a problem caused by different users using the same template at the same time.

Built in a small delay between Print and Save to correct an error which occurs because the print processor still has the document opening while trying to save at the same time.

<u>Related Adddresses</u>

Changes the wording from ‘Service of Notice’ to ‘Service of Notice (Section 48)’

<u>Owner Group – Accounts Summary</u>

Removed the ‘Rent Guarantee’ values if not using the Rent Guarantee facility. This is defined by setting the parameter ‘Arrears Waiting Days’ to zero.

<u>Tenancies/Deals</u>

The Arrears Balance now ignores any future transactions.

<u>Manual TAX Transactions</u>

When entering either PROTX or TAX in the nominal account section, the double-entry account is now automatically set to the opposite nominal. The system will insist on these being different if either is changed.

<u>Import Receipts and Standing Orders</u>

It is not now possible to import any ‘receipts’ with a future date.

If any standing order reference is imported that cannot be found the system creates a draft transaction. When the correct tenant can be identified, the system will now ask if the tenant’s standing order reference should be set to the same as the imported reference.

<u>Invoice Report Layout</u>

This data source now allows invoices to show the transaction ‘Date From’ and ‘Date To’ fields.

<u>Calendar</u>

Added a ‘Timescale’ parameter and ‘Row Height’ option to improve the calendar display. This allows for more appointment information to be displayed.

A parameter can now be set to disable the ability to move appointments on the calendar.

Reminders now only show for your own appointments

Email

Now allows for up to 5 file attachments

Scheduled Charges (SLI)

Charges can now be set as ‘Charge in Arrears’

Transactions Posting – CBP and SLR – Bank Details

When entering manual CBP and SLR transactions (or via Quick Monies) the default method of payment can now be overridden. This allows for bank details to be changed as required.

Quick Monies

CBP transactions must now have a Contacts selected

Works Orders Grid

Added Service Provided, Management Centre, and Marketing Office fields.

Quick Forms – Mandatory Fields

Mandatory fields are now highlighted in red italics. This will eventually be introduced to other forms.

Tenancies/Deals Grid

Added Move Out Date field

Windows Search 4.0

If a network is set up to run Windows Search on a server it is now possible to suppress the local search mechanism and only search the remote server.

The Veco Documents folder is not now automatically registered within Windows Search.

Home Page

If a user sets a ‘Home’ page this will automatically be loaded at startup.

Contacts – Lettings Applicants

Changed the wording of the date field: ‘Required From’ changed to ‘Required By’

Tenancies/Deals

Before allowing a tenancy to be marked as ‘Active’ the Initial Charges are compared with the Received Amount total. A rounding issue has been fixed.

Corrected a bug if an apostrophe is entered when searching a surname.

Tenancy Accounts Summary

Corrected a problem where the PLI Charges Due balance was including the wrong departments.

Notes

If a note does not contain an attachment, double-clicking the blank line does not now give an error.

Initial Monies Grid

Double-clicking a row now brings up the tenancy rather than show an error.

Quarterly Tax Return

Balances are now calculated on the Allocate Date rather than the Transaction Date.

Chart of Accounts

It is not now possible to delete a nominal account if it is used with the Transaction Templates.

New Accounts Report Grid – Owner Income

This new grid shows the gross owner income between any two dates. This is normally used for the Inland Revenue.

Period End Routine

Added more checking to catch any errors and reduce possible statement duplication.

General Reports

Added the ability to prompt for parameters when designing/running reports.

Live/Draft Transactions Grids

Added Invoice Number field

Search/Find Forms

Changed the wording of these forms to make it easier to understand which buttons are used to add a new record and select existing records.

Contact Grids

Added the ability to right-click on a contacts to create a New Appointment and a New Note.

Software Update Procedure

More error checking to prevent problems when attempting to add tables, views, etc that already exist.

Version 1.1.1.5

CHS Details on Property

Sorted date problem

Version 1.1.1.4

BACS/Cheques

Sorted a bug with HMCR payments getting included with contact payments

Version 1.1.1.3

Auto-Allocation (SLP)

Corrected a problem when allocating multiple SLI to multiple SLP transactions for the same tenancy.

Property Related Contacts

Allowed Property Related Contacts to be any type of contact.

Version 1.1.1.2

Period End

Corrected a bug when running the Period End Routine for the last period of the year.

Version 1.1.1.1

Works Orders

Correct a bug when an apostrophe was entered into the instructions

Property/Contacts

Corrected a bug where the list of user names was duplicating.

VAT Rate Change from 1st December 2008

On 24th November 2008 the Chancellor announced a reduction in the standard rate of VAT from 17.5% to 15% to take effect from 1st December 2008.

For Eurolink customers this means that any fee invoices entered manually, or calculated automatically from the Recurring/Scheduled Charges, from 1st December 2008 will need to carry the VAT rate of 15%. Any fees generated before 1st December 2008 will still carry the VAT rate of 17.5%.

In order implement these changes within the Veco software, the following procedure must be carried out **on (but not before) 1st December 2008**:

1. Ensure you install version 1.1.1.0 or higher, as detailed in this document.
2. From the “Admin” menu at the top of the screen choose “Parameters”.
3. Click the “Accounts” TAB
4. Click “Setup VAT Amounts”
5. Click “Add”
6. Enter 15 and click “Save”
7. Click “Update VAT”
8. Select “Old Rate: 17.5” and “New Rate: 15”
9. Click “Update”. This will update any Scheduled Charges.
10. Click “Save”
11. On the main “Accounts” TAB, change the “Current VAT Rate” from 17.5 to 15.
12. Click “Save”
13. Click “Close” to exit the “Parameters” form.
14. If you are using the Tenancy “Initial Charges” facility, you will also need to update the “Templates”:
15. Click “Admin : Templates : Initial Charges Template”
16. Change any items with “VAT Rate” of 17.5 to 15.
17. Click “Save”

Version 1.1.1.0 (Released 24th November 2008)

Veco Start Up

Speeded up the “Filling Calendar” routine during the loading of Veco

Transactions (PLI)

When selecting a Works Order, if the Works Order has an attached invoice the invoice will automatically become attached to the PLI transaction.

Tenancies/Deals

Added a new field for the “TDS Reference”

The tenancy “Extension” date now does not become activated until the “Confirmed Date” has been entered

The “Occupied Date” is now locked after the tenancy is made “Live”.

The “Account Summary” page now shows the deposit amount against the correct bank account.

Added a rent “Due Day” field showing that rent is due on the 1st, 2nd, 3rd, etc day of the month.

Adding an applicant to a tenancy now correctly marks the applicant as a “Tenant”.

Tenancies Grid

Added the TDS Reference field, and the Deposit Held by Owner tick box field

Works Order Grid

Added a field to indicate if the Works Order has an attached invoice

Live Transactions Grid

Added a field to indicate if a PLI transaction has an attached invoice

Contacts

When entering a new contact the system does not now insist on bank details being entered. The default “Paying Out Method” will now default to “Manual”.

Quick Monies

Access to the “Quick Monies” facility from the Tenancy Details is now controlled by a new parameter on the User Details.
After installing this update, ensure that all users who are allowed to use the Quick Monies facility are updated by ticking “Quick Monies?”

Added “Invoice Number” column

SLI and SLP (Owner Department) transactions are not now automatically allocated until the Tenancy becomes “Live”. This is to ensure that any rent monies received prior to the tenancy going live do not get paid out to the Owners.

Likewise, PLP transactions are not automatically created until the Tenancy is Live.

Any CBT transactions must now have a banking reference.

Added “Monies In” and “Monies Out” totals.

Transaction Templates

When setting up Transaction Templates it is now possible to define certain items as “Draft” or “Live”. The list of transactions presented to the user is then determined by whether the user is allowed to post draft or live transactions. After installing this update, ensure that the transaction templates are updated by ticking the “Draft” and “Live” columns on the list of transaction template items.

SLP transactions can now be defined.

Transaction Postings

It is not now possible to allocate an Owner Department transaction (SLI, SLP, PLI, PLP) until the tenancy is live. This is to prevent monies being paid out to an Owner or supplier. This applies to any accounting routine that would otherwise automatically allocate transactions:

Receipts (SLP)
Draft Transactions
Quick Monies

A general parameter has been added to allow this to be overridden.

Auto Allocate (SLP)

A new procedure has been added to allow the automatic matching of unallocated SLI and SLP transactions.

Initial Charges - Receipts

Added a new field for Banking Reference

Initial Monies Grid

Made various improvements to the routine:

Added deposit scheme details
Added a new section to show the individual receipts for a new tenancy
Added the ability to “Make Live” a tenancy where the receipts balance with the amounts due

Added a “Live” flag to the tenancy details

Active Lettings Applicants Grid

Enabled the “Add New” button

Active Sales Applicants Grid

Enabled the “Add New” button

Workflow Tasks

Corrected a problem where tasks could not be marked as completed if the grid was empty

Veco “Splash” Screen

The “Veco” screen shown when the software is loading does not now cover up all other applications

Fees Forecast Grid

The Installment Amount column is now totalled

Frequency (Rent, Charges, etc)

A new frequency of “4-weekly” has been added

Diary Projection

Appointments for archived properties or tenancies are now included in the projection figures

Diary Dates Grid

Appointments for archived properties or tenancies are now included

Tenancy Payments Procedure

Added a new procedure to allow the bulk payment of any Tenancy Department monies. This can be used to return deposits of other surplus monies to the main tenant.

Import Credit Notes (CHS Routine)

Added a new routine to allow the import of bulk Sales Ledger Credit Notes (SLN transactions). This is mainly used for local authority housing benefit offsets.

This works by matching a reference in the imported file with the Tenant Standing Order reference. Any records in the imported file that are now recognised are created as Draft transactions and can be processed from the Draft Transactions Grid.

User Details

If a user department is changed a message is displayed to warn that the user must logout and login. This is so that the correct department form layouts are re-loaded.

Notes

When adding a new note the default type is now set to “Telephone Call”.

Added a “Follow Up” date field. This also shows on the “Notes Grid”.

Added an option for “Save and New”.

Raise Charges (SLI) Grid

Added the “Tenancy Type” field

Windows Desktop Search

Windows Desktop Search version 4.0 (“Windows Search 4.0”) has added the facility to search documents on a remote server. A new Admin facility has been included to specify name of the remote server.

Help Menu Option

The “Help” menu option on forms has been enabled to allow your own help guides and manuals to be opened.

To use this facility, simply drag your own help documentation into the relevant “Help” folder within the “Veco” folder system on your PC or server. Those documents will then automatically appear in the “Help” menu.

Automatic Works Order Invoice Attachment

A new facility has been added (“Properties/Units – W/O Invoices”) to allow the automatic linking of scanned invoices to the relevant works orders.

To use this facility any scanned invoices need to be named with the first part of the works order reference. They can be stored in any folder on the server or PC. When using this new routine, the user will be prompted for the location of scanned invoices. Any invoices matching a works order will automatically be attached.

Properties/Units Grids

Added the Rightmove type (“RM Property Type”) field

Works Orders

Enabled access to the “Instructions” button for completed and cancelled works orders.

Quick Owner & Property Forms

Added “Same as Owner?” option to copy the same address from the Owner details to the Property.

Suitable Applicants

When matching a property with suitable applicants, the grid now shows the name of the negotiator responsible for the applicant.

Also, if an applicant has previously rejected a property the applicant will not be shown on the matching list.

Active Sales Applicants Grid

Added columns for “Buying Position” and “Selling Position”

Email Messages

Added the name search facility to the CC and BCC fields

Calendar

Corrected a problem where the “New Appointment” option was showing a date spanning two days.

Offer Progress

The “Progress Date” now defaults to the current date.

Contact Dates Grid

Now shows the property address

Property Dates Grid

Now shows the contact name

Key Logging

It is not now possible to book out a key that is already marked as outstanding. Keys that have not been returned are shown as such when selecting the key reference.

Property Key Dates

Corrected an error if the Owner Group title contained an apostrophe

New “Market Appraisal” Facility

New “Quick Lettings M/A” and “Quick Sales M/A” options have been added, for registering the details of an owner and property where the owner wishes to book a market appraisal (valuation). At the same times as recording the details an appointment can be booked. From the Appointment (Actions menu) a “Market Appraisal Form” can be printed for the negotiator to take on the appointment.

Marketing Menu

A new “Marketing” menu has been added to consolidate all marketing grids and functions.

Comparables Grids (Lettings and Sales)

New grids have been added to the marketing menu to allow a list of properties to be identified within the same area (based on partial postcode) for comparable purposes. The grid will show the latest rental value of the properties, or the most recent sale price. This grid can then be filtered based on price/bedrooms, etc.

Calendar Appointments

Appointments shown on the calendar are now shown with a symbol to indicate the status of the appointment:

Completed appointments are shown with a “Tick”
Provisional appointments are shown with a question mark “?”
Cancelled appointments are shown with a “X”

The status field is not now locked on “Key Date” appointments.

To avoid confusion, the “Responsibility Of” field has been renamed to “On Behalf of”. This fields also now shows on the “Diary Dates” grid.

Letting Board Movements

A new facility has been added to record letting board changes on lettings properties. Similar to the Sales Board Movement, a report can be processed and e-mailed to a board company indicating how boards should be changed.

Details of how the boards should be changed can be entered on the property “Letting Marketing Details” page.

Contacts “Date of Birth” Field

This now indicates if the contact is under 18 years old.

Works Order Form

Corrected a problem with the “Send Invoice To” office names now being shown when editing an existing Works Order

Lettings Applicant Details

Added a “Failed Reference” tick box

A warning shows when trying to add an applicant to a tenancy where the applicant has failed the referencing process.

Related Addresses

Added the option of recording the length of stay at an address

Contact Additional Details

It is not now possible to untick an Owner who belongs to an Owner Group

It is not now possible to untick a Tenant who belongs to a Tenancy

Owner Groups

Owner Groups “Title” field is now automatically completed based on the names of the owners. This field is now mandatory.

Suitable Lettings Properties

This grid can now correctly be sorted by price.

Mail Merge Datasources

Added “Owner Group Title” and rent “Due Day” as mail merge fields.

Owner Group Grids

Added the “Float” field

Parameters : VAT Rates

Added an option to allow the updating of the VAT rate on scheduled charges

Property/Units

Corrected a problem deleting key dates when archiving a property

Version 1.1.0.9 Changes

Minor corrections to cure some “timing out” errors

Version 1.1.0.8 Changes

Minor correction to problem with property Important Notes

Version 1.1.0.7 Changes

Receipts (SLP)

Corrected problem where first line not being processed

Version 1.1.0.6 Changes

Quick Applicant

Corrected error when entering a budget

Version 1.1.0.5 Changes (Released 31st October 2008)

Initial Monies Grid

Added missing menu option

The Initial Monies Grid displays tenancies where the initial tenancy invoice balance is not the same as the amounts received as shown on the Tenancy Initial Charges form. This feature was first introduced in version 1.1.0.0

Appointments

Corrected error when entering new appointments

Version 1.1.0.4 Changes (Released 30th October 2008)

Told & Sold

Re-enabled the "Told & Sold" option from the Contacts "Actions" menu

Works Order Authorisation

A new facility has been added called "Works Order Authorisation". Controlled by a parameter, this facility allows Works Order to be entered but not made "Live" until they have been authorised by a more senior manager.

Until such a Works Order has been authorised it cannot be printed or e-mailed to a supplier, and cannot be posted as a PLI invoice transaction.

"Draft" Works Orders are authorised by the relevant senior manager – determined by use of the "Authorise Works Orders" in the User Details – by using a new "Authorise W/O" grid available as a sub-option on the "Properties/Units" tree menu.

When a Works Order has been authorised an e-mail is automatically sent to the user who entered the Works Order, who can then print or e-mail the job sheet.

Works Order Form

The Works Order Form has been re-structured to make it easier to follow.

A "Change Log" has been added to record the details of any changes to a Works Order.

A Completed Date has been added.

Once a Works Order has been marked as "Completed" or "Cancelled" the details are then locked and no changes can be made.

The Works Order job sheet now includes relevant details about a property or tenant that a contractor may need to be aware of for "Duty of Care" reasons. This includes new "Health & Safety" information which can be entered against each property, and "Tenant Info" options that can be entered against the Tenant contacts. This information can also be include in Works Order mail merge templates.

Added a "Communications" tab to show the contact numbers and e-mail addresses of all parties. This can be used to send e-mail and SMS by right-clicking on the communications records.

User Details

Added an option to allow the user, by default, the ability to see all properties and tenancies within the same region rather than just a single office. This is relevant for users such as property managers who may work with properties and tenancies from more than one office.

Added a "Hide Accounts Summaries" option

Re-arranged the form layout to make it easier to read

Corrected spelling mistake – "Job Role" now spelt correctly.

Appointments

Corrected an error when opening appointments with recurrences

Corrected a problem where it was not possible to mark a Works Order follow-up as completed.

"Attendees" now only show active users and not those marked as "Archived".

Properties/Units

Added “H & S Information” as a pop-out tab. This will automatically appear on a job sheet.

Removed the photo from the Sales Marketing Details to create more space

Added “Web Link1” and “Web Link 2” to Sales Marketing Details, which are also uploaded to websites.

Increased the “Short Address” field from 50 to 100 characters.

Added “Purchased Date” to Appliances details

When entering a new property the “Gas?” field is now ticked by default. This ensures that a user has to make a conscious decision to un-tick this box, ensuring that gas expiry certificates are not missed by mistake.

Tenant Contact

Added a “Tenant Info” box to allow for specific (possible coded) information to be entered about the tenant. This information is added to a job sheet as (duty of care) information for a contractor sent to the property.

The options available can be configured as “Types”.

Accounts

Corrected a problem where un-cleared receipts were not being held back.

PLI Transactions – the transaction description is now automatically populated with the supplier invoice number, name, and works order description.

SLP Transactions – “Days Delay” now gets reset if the banking method is changed.

Live Transactions Grid – Added time to “Status Date” to allow easier sorting into order of posting.

Statement Narrative – a default narrative can now be entered which appears on statements. This can be set as a system default within Parameters, or individually on Owner Groups.

Bank Reconciliation – Improved speed, and added a “Refresh” button to be used when required such as when adding a new transaction without closing the Bank Reconciliation.

Receipts (SLP) Grid – Improved the filling of this grid for large volumes of data.

Fees Pending – Now correctly generates a PLN and PLR where fee refunds are due.

Reversing Transactions – It is now not possible to reverse a sales ledger transaction once fees have been processed. This will stop a potential problem where fees are generated on received rents but then the rent receipt is reversed.

Asset Register Grid

Added appliance Purchase Date

Property Grids

Added “EPC Expiry” date

Added “Gas” and “Vacant” columns to Lettings Properties Grid

Notes

Added the ability to “Push” and “E-mail” a note

While You Were Out

Added a “Sub-Type” field for note creation

Addresses

Postcodes are now automatically shown in upper case.

Contact Details

“Paying-Out Method” now defaults to BACS if the user has security rights to enter bank details; otherwise the default is set to “Manual Cheque”.

Grid Customisation

Added an option to “Unset” a personal grid layout, which then reverts to the department default

Appointments

Corrected a problem where the “Completed By” name was being duplicated in the description.

As it is technically only possible for Appointments with recurrences to show in the Calendar and not in the Diary Dates Grid a message is now shown to this effect when trying to use the recurrences feature.

Added a new “Reminder Date” to allow appointments to be looked at prior to the actual date of the event

This “Reminder Date” is also shown on the Diary Dates Grid so that views and filtering is available, and the Diary Projection Grid can now be used to display either the actual diary events or the reminders.

With key dates such as Gas Expiry, etc, the appointments reminder date can be pre-set to a certain number of days before (or after) the actual event date. These are defined on a new menu option “Admin : Templates : Key Date Reminders”.

A new column has been added to the Diary Projection Grid to show any “Overdue” appointments. Also, this grid can be selected by User.

Available Properties (Lettings and Sales) Grids

A new “right-click” option has been added called “View Property Photos” which allows all public photos to be displayed individually.

A new report has been added to allow the printing of the available properties in a more customisable layout. This allows for logos and other heading to be predefined.

Available Lettings Properties Grid

Added “HMO Date” and “Next Inspection Date” fields

Key Log Grid

The “Key” reference column which previously displayed the key name and reference has now been split into two separate fields on the grid. This makes it easier to search for a key by just using the reference (eg when using a bar code scanner).

The Key Log Grid on the Property Form now shows who and when keys were logged as returned.

Mail Merge

Corrected a problem with Office 2002 incompatibility

Push Forms

A parameter has been added to restrict this facility to only users within the same office.

User Details (from top “User” menu)

It is now possible for users to set themselves as “Unavailable” (together with a short message) so that anyone trying to send them a “While You Were Out” messages are informed that they are not available. This does not prevent the WYWO message from being sent.

Quick Lettings Applicant

Added “Pets?” and “Smokers?” tick box fields.

Changed the wording of “Notes” to “Specific Requirements”

Tenancies/Deals

Now shows the property “Service provided” field.

When setting or changing the “Extension Date” the “Confirmed Date” field is automatically cleared.

Tenancies/Deals Grid

Added “Extension” and “Confirmed” date fields.

Arrears Balance now includes all types of arrears not just those defined as “Owner” arrears.

Added an “Arrears Days“column that shows how long the oldest outstanding transactions have been in arrears. This makes it easier to be selective when producing arrears letters.

Owner Group Form

Added the property status to the property grid

Version 1.1.0.3 Changes

Corrected a problem where the address could not be accessed on an existing property.

Version 1.1.0.2 Changes

Sorted problem with drop-down options not showing on CHS forms

Version 1.1.0.1 Changes

Correct a problem where balances where not being shown on “Balances” grids.

Version 1.1.0.0 Changes (Released 29th September 2008)

IMPORTANT CHANGES

Performance Issues

To improve dramatically on performance, especially when running over a VPN, a number of changes have been made to the way grids and form details are loaded.

1. Grid layouts are not loaded with the "Best Fit" option. This prevents Veco from rescanning the database for the best column width settings which caused a drain on band width over a VPN or slow connection to the SQL Server. Instead, the column widths can now be adjusted manually and saved as part of the grid layout.

2. Blank forms for contacts and properties are created immediately at start-up. This saves time when loading contact and property details, but causes a small delay when loading the software initially.

3. A "Splash" screen is now visible when loading the software to show the "initialisation" process caused by the form creation changes.

4. To increase speed and prevent a potential long wait when tree options are chosen by mistake, some accounts grids now include a "Fetch Data" button. The grid is left blank until the correct options are chosen and "Fetch Data" is pressed.

Accounts Processing Routines

Accounts procedures, such as "Receipts (SLP)", "Payments (PLP)", "Owner Payments", etc, only show the details and balances as they are when the grid is first displayed. In other words, they do not update in real-time if another user is posting other transactions on a different PC.

It would be possible for two or more users to create transactions by processing the information shown in a grid even if another user has posted transactions in the meantime from the same or another grid.

For example:

User A goes into the "Owner Payments" grid and "Owner X" shows a balance of £1,000.
User B goes into the "Payments (PLP)" grid and pays an invoice for £100 on behalf of "Owner X".

The balance of "Owner X" still shows as £1,000 on User A's screen, and NOT £900.

If User A was to click the "Process" button, "Owner X" would be paid £1000 and NOT £900.

Therefore, it is important that any of the "grid-based" accounts procedures are NOT run while other users are posting transactions either manually, of from other accounts procedures. Only ONE user should be using any of the accounts procedure grid at any moment in time, although any number of users can post transactions manually.

To prevent the possibility of a second person mistakenly posting erroneous transactions, any accounts grid requiring processing is now locked while it is being used by another user.

<u>Properties – Owner Details</u>

Current owner not being unset when changed in another owner

<u>Owner Payments</u>

Corrected a problem with unallocated amount being included in payments to owners under certain circumstances.

The grid is not now filled automatically until a department is selected.

<u>Owner Statements</u>

Corrected problem with arrears balances

<u>Tenancy Grid</u>

Added columns for “Property Service Provided” and “Management Centre”

Added a right-click option to “Add New Note”

Property Grid

Added a right-click option to “Add New Note”

Lettings Applicant Grids

Added columns for “Smoker”, “Sharer”, “Children”, “DSS”, “Pets”, and “Pet Type”

TDS File Creation

Tenant and Landlord addresses are now shown correctly. A message is now shown during the file creation process

E-mail Messages

Added a “Search” field to allow searching of any e-mail addresses

Initials Tenant Charges

The difference between the amount due from the tenant and the amounts paid is now shown.

Initial Charge/Invoice Report

Any 0.00 amounts are now suppressed.

When invoices are printed the report is now attached to a note.

Initials Tenancy Charges Grid

A grid has been added showing the outstanding balance of any initial tenancy charges.

Active Tenancy

A tenancy can now only become active if the tenant(s) have paid the agreed initial charges within a +/- error as entered as a parameter.

BACS File Creation

Removed the comma from the BACS reference in fixed length format templates, and added a CRLF to the last record.

Accounts Tree

The accounts options on the main tree were getting very cluttered and potentially confusing, so the menu has now been reconfigured into three nodes:

- Accounts Postings
- Accounts Procedures
- Accounts Reports

Any customisation of the accounts tree options may need to be re-entered.

Transaction Details

The supplier selection list now automatically shows a drop-down list as it is being filled.

Notes

Added an option to e-mail a document attached to a note

Viewing Appointments

The current Owner Group is now attached to the view diary appointment together with the owner details and default communications number.

Tenancy Details

Corrected a problem with clearing date fields

Owner Group and Tenancy Details

Added new fields for salutation. These are also available in mail merge data sources.

Owner Group

Added related addresses for:

- During Negotiations
- During Tenancy
- Residential – Section 47
- Service of Notices

These are also available in mail merge data sources.

Report Data Sources – for Windows Cards

Added option for the EPC image Added property Marketing Description

Draft Transactions

Corrected a problem with “Make Live” not working

Mail Merge Clauses

Clauses over 255 characters are now processed correctly.

Works Orders

When a new Works Order is created, the automatic note contains a link to the property.

Works Orders Grid

Added columns for “Work Required By”, “Estimated Cost”, and “Days Outstanding”.

Miscellaneous

Various changes to prevent accounts “rounding” errors

Version 1.0.2.1 Changes

Statements

Restore printing code previous removed for testing purposes.

Version 1.0.2.0 Changes

Payments (PLP)

Corrected a problem where “Tenancy” department payments were not using the correct working bank account.

Estate Budget

Corrected an error with values over 999

Property Photos

Corrected a problem with the metres to feet conversion

Contact Details

Corrected a problem with clearing out some changes in tabs

Property Details

Corrected a problem with clearing out some changes in tabs

Version 1.0.1.9 Changes

Payments (PLP)

Corrected error “Ambiguous column name TransactionPK'

Version 1.0.1.8 Changes (Released 1st September 2008)

Statements

If an email address is invalid the Statement will be printed and not cause an error.

Corrected an error with the Standard Statement with xrLabel43.

Fixed problem with multiple records showing

Works Orders

Added “Completed Date” field

Added “Over Timescale Reason” field

Re-arranged the layout of the Works Order form

Contacts

Added “Government Compliance” section to the Additional Details tab

Added “Created By”

Owner Groups Grid

Added Portfolio Reference

Properties/Units Grid

Added Portfolio Reference

Diary Dates

These are now grouped and show the number of records in each group.

Quick Owner & Property

Corrected mistake with the default date of a new Appointment.

Contact Communications are now added to the “Description” field

An existing Contact can be used to create the ”Quick Owner & Property” as long as the Contact is not in an existing
Owner Group.

Tenancies Grid

Added “Property Manager” and “Responsibility Of”

Appointments

Corrected error if too many Attendees are added

Added “Office” field so that Appointments can be made for User’s in another Office.

The option to “Show User’s Calendar” has been added as well as “Show Office Calendar” option.

Lettings Applicants Grid

Added Source column

Sales Applicants Grid

Added Source column

Parameters – Reference Prefixes

Prefixes of 1 or 2 characters can be added to the start of generated References for Contacts, Properties, Owner Groups, Tenancies, Estates and Works Orders.

Parameters – E-Mail/SMS templates

Added a “Default Text” field for blank E-Mails

Communications Tabs

A right click option has been added to either create a “New Email” or “New SMS”.

Properties/Units

“Important Dates” can be cleared and the associated Appointment is deleted.

If any “Important Date” is overdue then a warning message is shown on the load of the Property form.

When an Appointment is created for an “Important Date” the current Owner Group is added to the Appointment

Archive Applicants

Added a process under the Admin menu to set the “Status” of Lettings and Sales Applicants to Archived. This is based on when the Applicant was either “Created” or “Modified” being beyond a Parameter setting in weeks. A Note is also created recording the “Archiving” of the Applicant.

If the “Status” of a Lettings or Sales Applicant is set to “Archived” a Note is created.

Admin Menu

This has been re-arranged and two new sub menus added “Templates” and “Processes”.

Property Photos

A Photo record can be added without having an image.

Added “Floor” field

Added “Order” field

The “Floor” list is found under the “Templates” menu under the Admin menu.

Photo records can only be categorised if it has an image.

Offers & Sales

Added “Progressed By” field

“Links” in the “Chain” can be deleted using a right click option. Only the end “Links” of the “Chain” can be deleted.

Sales Progression Grid

Added Progressed By which is now used as the filter when showing the Sales Progression records

Tasks Grid

If the "Task" record relates to a Tenancy then the Property is also shown.

Transactions

The "Office" can be changed for new Transactions

The "Accounting Period" was being overwritten by the Date

Fixed the problem of Reversed Transactions showing in the list of Transactions to Allocate to

Fixed the problem of "Relates To" fields not being filled if records were "Archived"

Fixed the problem of an error appearing when tabbing onto the "VAT" column in the Analysis

Viewing Appointments

When a "Viewing" Appointment is created from a "Match" the "Viewing Arrangements" are added to the "Description" field

Calendar

The User's Calendar now uses the same Parameter Date filters as the Main Calendar.

Tenancies/Deals

The "Unallocated Balance" on the Accounts Summary now excludes Reversed Transactions

Scheduled Charges

"VAT" amount in the Analysis was not showing for existing Charges if the Charge was an SLI

Receipts SLP

Fixed problem with the grid blanking after sorting the grid

Owner Payments

When processing, if an error occurs when trying to send an e-mail the error is captured and no email is sent but the routine continues.

Rounding

Values are now rounded to two decimal places

Mail Merge Data Source Changes

Added the "Default Communication" filed of any Contacts in the mail merge

Best Fit (all columns)

Removed the automatic "Best Fit" option on most main grids to optimise the speed of filling. This option is available to the user as a right click on the column header.

Version 1.0.1.7 Changes

Ownership Account Details

Corrected a problem where the Account Number and Sort Code weren't updateable.

Version 1.0.1.6 Changes

Tenancy Arrears Date

Correct error when a new Tenancy was added with an Arrears Date.

Version 1.0.1.5 Changes (Released 1st August 2008)

Owner Payments

Improvement made to the Owner Payments routine to prevent to possibility of duplicate payments where e-mail processing fails.

Diary Appointments

Added “Sub-Type” field

When an appointment is marked as “Completed” the user is now prompted to create a “Follow Up” appointment.

An “Actions” menu has been added to the appointment form to allow the production of an “Appointment Report”. This can be used to print out the details of the appointment. For example, details of a viewing.

Office Diary from the appointment form now shows the time range as defined in parameters.

Diary Projection

Added appointment Sub-Type column

Columns totals are now shown

Quick Owner & Property

Corrected spelling mistake

Dates Grids

The “Dates” sub-grid on Contact, Owner Group, Property, and Tenancy now show any appointment feedback.

Calendar

The calendar on details forms now show the correct time range as defined in parameters.

New appointments added from a details form now show the correct end date.

Sales Boards

Property Marketing Sales Details now has a section to record Board movement. (Property Layout Updated)

A new “Sales Board Movement” grid has been added as a sub-grid to Properties/Units. This allows a report to be sent to the person/company who deals with keeping sales boards up-to-date.

Properties/Units (Property Layout Updated)

Added “Source” field

Added “Contract Expires” date field

Rearranged the layout of the “Descriptions” tab and added a “Directions” field

Changes to marketing fields, photos, or descriptions will now automatically invoke a web-site upload (if uploading to web-sites via Eurolink)

Renamed “Offers” tab to “Sales Offers”

Renamed “Portfolio Information” to “Market Appraisals”

Auction Property

Added “Communications” tab to show all related contact communications details.

Offers & Sales

Added “Communications” tab

Added an “Invoice Paid” date

A “Progress” note is automatically recorded when a change is made to an offer

When searching for a solicitor on specific “Solicitor” contacts are now shown.

Negotiator field now defaults to the current user.

Sales Progression Grid

Added “Invoice Paid” field

Added “Completion Date” field

Added “Sales Fee” total

Added button to show/hide “Completed” sales

Added a record count for each group

Auction Property

Renamed “No Mortgage Details?” to “Mortgage?”

“Name of Agent” is now a link to a specific contact rather than free text.

“Where did you hear of us?” is now a drop-down selection.

“Valuer’s Initials” is now a drop-down list of users.

The Auction Property form now loads in such a way that other forms can be opened at the same time.

Auction Property details are now locked when the auction has taken place to prevent changes being made.

Communications

Slight changes so that it is clear which field is used for the phone number/e-mail address.

Company Details

Added “Website” field

Office Details

Added “Website” field

Parameters – E-Mail/SMS templates

Added website fields [CompanyWebsite] and [OfficeWebsite]

Owner Payments

Payments are dated the current date instead of the end of the current accounting period.

Increased performance dramatically

Owner Statements

Various changes and improvements

Statements now show movement on all accounts, not just the main account.

Owner Group

The Accounts Summary now ignores reversed transactions in the Unallocated Balances section.

Quick Forms

Allow partial name searching

Applicant/Property Matching

When creating an appointment from the suitable property list, the contact details are automatically included in the notes. Also, a 15 minute default reminder time is set automatically.

When saving the property selection any “excluded” properties remain excluded.

Contact Details (Contact Layout Updated)

Added a “General” contact type field

BACS/Cheques

BACS file now shows the correct amount

BACS/Cheque record is now sorted in the correct order.

Purchase Refunds (PLR) without banking references are now correctly deducted from any payments to the same supplier.

Tenancy/Deals

Corrected an error when a new tenancy was saved with an Inspection Date

Tenants can now be removed if added by mistake as long as the tenancy has no transactions.

Deposit Details tab has been reorganised. Only Accounts or General users can now edit the deposit protection dates and details.

The deposit account is now automatically set to the default account from the Owner Group details

“Occupiers Full Names” now shows the tenant first, other, and surnames. An “Additional Occupiers” field has been added to allow the addition of the names of children who may be occupiers. These fields are now combined on mail merge documents.

Changes to the Tenancy Dates (Occupied, Extension, Vacating, Move Out) are now recorded in the status log.

Changed the way the “Agreed Fees” tab works to make it easier to use.

Important Notes now pop-out automatically.

User Details

Corrected a problem with the e-mail signature causing an error

Tenancy Grid

Added Tenancy Office field

Scheduled Charges

Corrected a problem where the VAT field was not being reset if a new charge was changed from PLI to SLI.

Supplier Contact Details

Correct a problem with the insurance “Cover” not being shown correctly.

Bank Reconciliation

Corrected a problem where the reconciliation could not be finalised if no bank statement had been imported.

Quick Lettings Applicant

Changing the Monthly/Weekly budget now automatically re-calculates the other Weekly/Monthly budget figure.

Chart of Accounts Grid

Grid is now grouped by account type

Parameters

Added an option to not check for web accessibility. This will allow the system to copy with “web proxy server” problems.

Contact Grids

These grids now show the total number of records available as well as the number of records showing.

Period End Routine

Owner Payments no longer need to be run as part of the Period End Routine.

BACS/Cheques routine no longer needs to be run as part of the Period End Routine.

The menu option is now available at all times, although the routine can only be run after the end of the current period.

Fees Processing

Ensure the available balance is rounded to prevent problems.

Available Properties Grids

An option in Parameters now allows for the “Type” column to be either the “Matching Property Type” or the “RM (Right Move) Property Type”.

Auctions

Corrected an error when adding a new auction

Balance Grids

Owner Group, Property, Tenancy, and Supplier balance grids are now grouped by account reference. This makes the grids easier to read.

Tenancy Initial Charges

Added a complete procedure for allowing the recording of Initial Tenant Monies Due, Tenant Monies Received, Initial Landlord Charges, Tenant Renewal Fees and Landlord Renewal Fees. An initial tenant account can be printed, as well as a landlord pro-forma invoice. These details can be entered by negotiators as no accounts transaction postings are generated.

Templates for all initial and renewal fees can be created under the “Admin” menu.

Version 1.0.1.4 Changes

Owner Statements

Corrected a problem with tax not being shown on statements correctly.

Version 1.0.1.3 Changes

Processing Fees

Changes to ensure the Last Payment Date is correctly set.

Version 1.0.1.2 Changes

Notes Grids

These are now grouped and show the number of records in each group.

Period End Routine

Corrected a problem with rounding owner balances.

Version 1.0.1.1 Changes (Released 4th July 2008)

Owner Groups

Corrected a problem where the Owner percentages could not be amended even though no transaction had been posted.

Raise Charges (SLI)

Corrected a problem where the new schedule items was not being calculated correctly is some circumstances.

Statements

Corrected a problem when running final statements

Ensure that an e-mail address actually exists for owners that have “Send E-mail” ticked.

Version 1.0.1.0 Changes (Released 4th July 2008)

Transactions

To avoid confusion, the “Allocation” tab on transactions has been renamed to:

“Auto Allocate Now” – if the transaction is not already allocated

“View Allocations” – if the transaction is already allocated

Corrected a “memAttachment” when manually allocating a supplier payment PLP

Diary Appointments

Corrected an error when changing an appointment from one user to another.

Version 1.0.0.9 Changes (Released 1st July 2008)

Property and Contact Layouts

This version includes additional fields to the property and contact form layouts. Layouts will need to be customised again as appropriate for your company. See notes on page 3.

Property Details

When entering EPC values and generating the EPC graphs from Quest, if the graph is right-clicked and saved to the Desktop as “epcgraph.jpg” (which is the default), the graph will automatically be added and as a photo.

Corrected an error when web uploading properties if marketing descriptions contained an apostrophe

Corrected an error when searching for owner names containing an apostrophe

Corrected spelling of “Centre” as in “Management Centre”

The field “Property Type” on the main property tab has been changed to list all valid Rightmove property types. This is uploaded to websites. On the “Lettings” details tab the property type used for matching against applicants is now either “House” or “Flat”. This has been renamed as “Matching Property Type”. The property type on the “Sales” marketing details tab has been renamed as “Matching Property Type”. Please note that if you have used your own codes for “Property Type” these may not now be available. This has been changed to introduce some conformity with the property types used on websites and with the way Veco matches applicants and properties.

Contacts

Added “Registered Address”

Other than when entering a “Quick Applicant”, all contacts must now have an address.

“File As” and “Address Title” are now entered automatically when saving a contact if these fields have not been completed manually.

E-mail addresses entered in Communications details are now validated for the correct format to ensure errors do not occur when sending an e-mail.

Lettings Applicant Details

The “Budget per week” and “Budget per month” fields are automatically calculated from whichever field is entered.

“Required From” date is no longer mandatory and can be left blank, however, if this field is entered the applicant will only match with properties available before the date entered.

Added a “Reason for moving” field

User Details

Staff names can now be changed and the change is reflected throughout the system.

Office Details

If the Office name is amended the change is reflected throughout the system.

Transaction Template

Added option to allow the automatic updating of the tenancy “Deposit Received” and “Deposit Returned” fields when entering transaction via the “Quick Monies” form

Tenancy Details

Added a field to the "Deposit Details" tab to allow any manually changes to be included in the TDS upload file.

The "Deposit Received" and "Deposit Returned" fields are automatically updated when the "Quick Monies" form is used to post transactions that relate to deposit.

Added an "Inspection Date" field which automatically creates a diary appointment.

Added a specific "Forwarding Address" field.

Corrected an error when posting PLI & PLP transactions

Added a "Milestones" tab that can be used to monitor the progress of a new deal

"Agreed Fees" can now only be amended by a Manager.

"Scheduled Charges" now automatically try to calculate the number of instalments based on the length of the tenancy.

"EPC Expiry Date" is now mandatory before any tenancy can become "Active" where a tenancy has a start date of 1st October 2008 or later.

Added a new "Communications" tab that shows all communications method for every tenant. This will prevent having to open up each individual tenant to find out the phone numbers.

"Occupiers Names" fields are now updated if a tenant moves out and a new tenant moves in.

Added a "Special Conditions" pop-out note. This can also be used for mail merge.

Owner Groups

Added a "Related Address" tab

When creating a new Owner Group the "Service of Notices" address is automatically set to the address (or registered address) of the first owner added to the group.

Added a new "Communications" tab that shows all communications method for every owner. This will prevent having to open up each individual owner to find out the phone numbers.

Ownership percentages now allow for up to 2 decimal places.

Mail Merge Data Source Changes

Added various additional mail merge fields to data source options

Corrected a bug when using mail merge clauses

Data sources are now shown as "Non editable" to indicate that the results of the mail merge can not be edited by the user.

Calendar

An option has been added to allow "Key Dates" (ie ones entered automatically by the system, such as Gas Expiry Date) to be hidden from the main calendar. This option can be toggled on or off by using the right-click menu on the calendar.

Corrected a problem with the auto-reminder facility not popping up

Corrected a problem where the "Day View" was not showing the correct date by default

Bank Reconciliation

Added the Reconciled Balance and Bank Rec Difference values to the report

Added an option to allow bank statements from a bank's online system to be imported and automatically reconciled against Veco transactions.

A parameter has been added to allow the field order for importing statements

Accounts Summary

Corrected a problem where the "Uncleared Income" value was showing incorrectly where a transaction had multiple allocations.

Receipts (SLP) Grid

Corrected a problem where there was a limit on the number of transactions that could be processed at one time.

Transaction Postings

Activated an option to allow the tenancy details to be cleared when not needed
Corrected a problem when allocating SLI to SLN

Added a new facility to allow scanned invoices to be attached to the invoice PLI posting. Any invoices are now automatically attached to e-mailed statements.

For transactions that need a "Banking Reference", eg receipts and payments, the reference can now be changed up to the point where the transaction is reconciled. This is to allow the correct of mistakes when writing cheques.

Works Orders

Added an option to attach a document (eg invoice) to the works order record. This is automatically attached to any PLI transaction posting.

Added a spell-check facility to the works order instructions

The "Follow-Up Date" is now automatically entered based on a new parameter to indicate how many days ahead the follow-up should be set for.

Added a "Time Range" drop-down list to indicate a preferred time for the works to be carried out. The options on the drop-down list can be added under the "Types" parameters.

Corrected a problem where the printed works order showed the wrong communications method.

Corrected a problem where the invoice created directly from the works order did not pre-populate the relevant fields if the Owner Group had multiple properties.

A file note is automatically created when a new Words Order in entered.

Active Lettings/Sales Applicants Grid

This grid can now be show either based on the user's current office, or by all areas relating to the current office. This allows for applicants to be shared amongst neighbouring offices where there may be an area overlap. This setting is available as a general parameter.

Tasks Grid

Added the correct record count

Appointments

Added a “Responsibility Of” field

The option to “Show User’s Calendar” has been changed to “Show Office Calendar”. This is so that the person making an appointment for another user can ensure that other people in the office are not out at the same time.

Automatic diary appointments created from tenancy Vacate Date now show the relevant property.

Statements

Owner Statements are now addressed to the Owner Group title, rather than the individual Owner contacts.

Quick Applicants

Corrected an error when saving an applicant with an apostrophe in the surname

Quick Lettings Applicant

Added “Occupation”, “Required From”, and “Reason for Move” fields.

Fees Pending

Fees based on a percentage of the rent can now be processed at any time rather than just as part of the month end procedure.

The Fees Pending Grid is now totalled when grouped

Payments (PLP)

When calculating whether an invoice can be paid the system now takes into account any outstanding works orders.

Push Form

Push Form facility now automatically adds a note for the record being pushed as proof that the call/enquiry was passed to another member of staff.

While You Were Out

While You Were Out facility now automatically adds a note for the record being pushed as proof that the call/enquiry was passed to another member of staff.

Items cannot be deleted unless they have been read.

Notes Grid

Added a “Time” column

Tenancy Milestones

Added a template to allow setting up of tenancy milestones. A new tenancy tab has been added for this purpose.

Paying Out Method

If account number and sort code are entered the system will automatically set the “Paying Out Method” to BACS.

Diary Projection

Added a new facility to summarise future diary appointments and events. This grid can be shown by office and by diary type, and shows the number of events for “Today”, “Rest of the Week”, “Next Week”, “Rest of the Month", "Next Month" and "Rest of the Year". Each value can be double-clicked to allow the individual diary appointments to be shown.

Fees Received Grid

Added a new grid to show the value of fees received for any given accounting period. "Fees" can be defined by using the "Special" field on nominal accounts.

Quick Forms

These forms can now only be used "modally". This means that they have to be completed before any other functions are available. This avoids many "Quick Forms" being open at the same time.

Available Lettings Properties Grid

Any properties with a past available date are now shown as being available "Immediately".

Balance Rounding

Corrected a problem with rounding that prevented some invoices from being paid when there were sufficient funds.

Import Applicants

Corrected an error when processing importing applicants

Owner Payments Grid

Double-clicking on an owner now shows the Owner Group details to allow the Accounts Summary to be analysed.

Mail Merge

It is now possible to add a watermark to the results of the mail merge.

File Notes

File Notes now allow for a "sub-type" to allow further categorisation of notes. A default sub-type can be recorded against mail merge templates, and the sub-type can also be entered when sending an e-mail, SMS, or creating a Works Order.

Version 1.0.0.8 Changes (Released 23rd May 2008)

New Referral System ("Told & Sold")

Added a new option for allowing contacts to be referred to other companies or associated departments. Please speak to Eurolink Sales for more information.

Active Lettings and Sales Applicants

Added "Source" column.

Lettings Properties Grid

Added "Current Status" column.

Mail Merge Data Sources

Corrected spelling of "tenancy".

Added full wording dates for occupied and vacating dates.

Sales

Added a grid for recording "Milestones" when dealing with sales Offers.

Property Details

Added "Asset Reference" to the appliances grid, which can be used for recording internal asset references. These references can also be shown on a full "Asset Register" grid available from the "Properties/Units" tree option.

"Managing Office Name" has been renamed as "Management Office". This name is designed to be the office that will be dealing with the ongoing administration of the property, even though the property might not actually be "Managed" as such.

The property category "Management" has been renamed as "Lettings/Management" to avoid confusion. "Lettings" properties are those properties that are currently available to "Let" or have been dealt with by staff who work in "Residential Lettings". "Management" are those properties being managed, or that form part of an Estate in block management. It was considered that just having a category of "Management" gave the impression that the property was being "Managed", which may not be the case.

Corrected an error with the Documents tab if the property had not been assigned a reference.

E-Mail

Editing options are now working (Copy, Paste, etc)

Mail Merge

Made improvements to the interface with Microsoft Word. This should correct some of the problems when importing and editing existing Word letters.

Transaction Postings

Corrected a problem where VAT was not clearing correctly after using the "Save and New" button.

Estate Details

Added an option to allow for "Multiple Freeholders". This is applicable where the properties that form a single Estate can have more than one freeholder. If this box is ticked on the Estate details form the Freeholder details must be selected at the Property/Unit level.

Raise Invoices (SLI/PLI)

Added a column for the Estate.

Works Orders

Corrected a problem where the important notes were not showing automatically.

Receipts (SLP) Processing

Corrected a problem when processing amounts greater than £999.

User Details

The User Details option from the main menu is now controlled with security access.

When a user is set to a status of “Archived” the system will now allow future diary appointments to be changed to another existing user.

Tenancy/Deal Details

It is not now possible to make a tenancy “Active” if the property has gas but the Gas Expiry certificate has not been renewed. A valid Gas Expiry Date has to be entered against the property.

Owner Group Details

It is now possible to adjust the owner percentages and add new owners to an existing Owner Group as long as no accounting transactions have been posted to the Owner Group.

It is also now possible to add and delete owners as long as transactions have not been posted.

Applicant Status

The restriction that only a manager could change the applicant status has now been removed, however only a manager can change the registering office.

Additional Security measures – “Cooling-Off” Period

When adding a new property or contact the user may only have “Create” rights but not “Update” rights – this may apply to weekend staff or negotiators in particular. However, to allow for genuine mistakes when entered a new contact or property, or where certain information is not immediately available, it is now possible to set a “Cooling-Off” period of a set number of hours within which it will still be possible to make changes to the contact or property. The number of hours is set in Parameters. A “Cooling-Off” period of zero hours will deactivate this facility.

Additional Security measures – Financial Details

It is now possible to allow/disallow individual user from being able to add or update financial information on contacts and ownership details. These are the details that include the owners bank account number, sort code, and payee name.

Users that do not have either “Add” or “Update” rights to financial details will not be able to see this information, or be able to see “Account Summary” details. Users with “Add” rights will be able to add but not change the information even though they will see this information.

Bank account numbers, sort codes, and credit card numbers are now shown with asterisks instead of the digits, apart from the last few digits.

Calendar

It is now possible to set the length of the working day (eg 0700 – 1900) to allow for more information (and less blank time slots) to be shown on the day view of the calendar.

Adding Owner Group to Property

Corrected the wording on the form title which was incorrectly labelled “Freeholder Group Find”.

Statement Reports

We are adding new statement formats to improve the statement presentation. It is now possible to set a default statement in the reports section of Parameters, and also to specify on the Owner Group which statement format is required.

Offers & Sales Details

Corrected a problem where it was not possible to use the mail merge facility if no solicitor details had been entered.

Quick Contact Forms

When entered a new contact the surname field now defaults to the same name as entered when doing a search.

Website Uploads

Corrected a problem where properties were not being uploaded correctly to more than one website.

Transactions by Nominal Grid

Added the nominal account “Heading” and “Sub-heading” columns to the grid

When grouping, a balance total is show within the group header.

Version 1.0.0.7 Changes (Released 7th May 2008)

Offers & Sales

Various slight wording changes on Offers form, and other cosmetic changes.

Works Orders

Corrected a problem where jobs set to “Increase Float” would not automatically allow invoices to be generated.

General Notes

Corrected a problem where an error message appeared when entering notes with documents attached.

When using the mail merge facility, the name of the document is now included in the automatic note.

Property Details

Custom form layouts can now only be loaded (as well as changed) by designated administrators, so that different departments cannot see fields that relate to other departments.

Added a “Documents” tab to allow immediate access to documents without having to use the “Document Finder” facility, although this can still be used for more customised key word searching.

Contact Details

Custom form layouts can now only be loaded (as well as changed) by designated administrators, so that different departments cannot see fields that relate to other departments.

Added a “Documents” tab to allow immediate access to documents and e-mails without having to use the “Document Finder” facility, although this can still be used for more customised key word searching.

Works Orders Grid

The Works Orders grid on both Property and Estate tree menus now does not show cancelled or completed jobs.

Available Sales/Lettings Properties

Adjusted the report margins to allow more wording to be shown.

E-mail Messages

Added a spell-checking facility.

Tenancy/Deal Form

Added a “Weekly Rent” field which is automatically calculated from the tenancy rent.

Diary Appointments

Added an option to open the property, contact, tenancy, etc directly from the appointment form.

Mail Merge

Added an option to print the resulting documents when merging with multiple contacts.

Demand and Invoice Generator

Corrected a bug where the same invoice number was being assigned under certain circumstances.

Period End Routine

All invoices no longer have to be generated as part of the Period End Routine.

When running the Cheques/BACS routine, the system now ensures that all contacts have a valid "Paying Out Method".

Version 1.0.0.6 Changes (Released 23rd April 2008)

Statements Grid

Added a filter bar to the grid

Payments (PLP) Grid

Added the “Office” column to allow payments to be selected by office

Mail Merge Templates Grid

Added “Datasource” column so it can easily be seen which data source the mail merge templates are linked to.

Applicant Details

“Required From” date fields is no longer mandatory. When left blank this will allow the matching against any properties regardless of when the property is available.

Offers & Sales

When a new offer is entered the “Offer Date” defaults to the current date. It can be changed, but then locked once the offer is saved.

When an offer status is changed to “Rejected” or “Withdrawn” the offer can lo longer be edited. In other words, a rejected offer remains on file, and any new offers require the creation of a new “Offer” record.

On the Offers & Sales Grid the fee percentage and fee amount are now shown.

Available Lettings Properties

The report can now be correctly sorted by Asking Price.

Transaction Postings

The VAT field on invoices now only allows the selection of valid VAT rates. Previously, any figure could be typed into the field.

Draft Transactions

If any transaction in the “draft transactions” list is a SLP transaction (ie tenant receipt) you are now given a warning that the transaction will need to be allocate if not automatically allocate when the “Make Live” button is pressed.

Reversing Transactions

It is now no longer possible to overdraw an account by reversing a transaction. Previously, a prompt would give the option of overdrawing, but this is no longer possible.

FTP Web Uploads

The web upload mechanism has been improved, and now shows a progress bar to indicate how long the update might take.

Software and Database Updates

When installing “Veco” updates a windows now shows what is being processed.

Void Periods

A problem has been fixed where no property was being shown if a tenancy had an occupied date of before the property was registered on “Veco”.

Mail Merge Templates

Corrected an error when copy and pasting within the same document

Database Backup

Ensure that the backup selects the same name as in the connection details

Views

Corrected an error when trying to overwrite an existing view

Suitable Properties

Corrected an error when matching

Owner Payments

The owner payment routine will now prompt before sending e-mail or SMS notifications to the owners.

Statement Production

Added a parameter to allow or prevent PDF files from being produced for those Final Statements that would normally be printed instead of being e-mailed. This will speed up the Final Statement process as part of the Period End routine.

“Add New” button on various Grids

The inactive “Add New” button on some grid has now been activated.

Sales Progression Grid

The full “Sales Progress” notes are now included when printing an offer’s Sales Progression details.

Applicants Grids

Added “Max Bedrooms” column

Letting/Sales Property Grids

Added “Bedrooms” column

Property Details

When the property has gas, if the “Gas?” box is ticked it is not now mandatory to enter a gas expiry date, which may not be known at the time the property details are first entered.

Accounts Period End Routine

It is now not a requirement for Demands to be generated.

Lettings Statistics

Added a “Moved In” statistic column

Preview rows on Notes Grid

Notes details now show in full.

Notes on details forms

Notes can now be printed in full.

Tenancies/Deals

Corrected spelling mistake - “Archive” should read “Archived”.

Added tenancy “Status” field to the Tenancies/Deals grid.

Service Charge Demands

The service charge demand sent to leaseholders now includes the “Summary of Rights and Obligations” printed on a second page.

User Details

It is now possible the set a user status to “Archived”. Once archived, the user can no longer log into “Veco”, and will not appear on the name selection drop-downs.

Document Searching

A new “Documents” tab has been added to the contact and property details forms. This automatically displays a list of any documents (or e-mails) that relate to the particular contact or property. From here, documents and e-mail messages can be opened by double-clicking.

Properties/Units – Lettings and Sales Grids

These grids now show all properties that have not been archived, rather than just the “Available” properties.

Added the “Vacant?” flag to the Property Lettings grid.

Internet Availability

The software now checks to see if an internet connection is available. The software will now open if no internet connection can be found, but some functions such as web-uploads and postcode searching will be disabled if the internet is not available. A small icon is now shown on the main “Veco” screen (bottom right) to indicate if an internet connection is available.

Diary Dates Grid

Added “Description” column

Version 1.0.0.5 Changes (Released 4th April 2008)

Users Grid

Added the ability to send SMS and e-mail messages to individual users by right-clicking a particular user. A mass e-mail can also be sent to a number of users.

Suitable Properties

When producing a list of suitable properties for a particular applicant an option has been added to save the selection after printing or e-mailing the list.

Property Details

Added fields for “Tenure”, “Sales Fee”, and “Sales Fee %”. These are used by the Sales module.

Under the “Actions” menu - renamed “Open Owner” to “Open Owner Group”.

Ensure there is always a “Current Owner” for every property. This fixes an accounting problem where some transactions did not record the Owner Group because the existing Owner Group was not marked as “Current Owner”.

Offers & Sales

A full “Offers” and “Sales Progression” facility has been added for all “Sales” properties. An “Offer” includes details of the Applicant, Vendor, and both sets of solicitors, together with an “Offer Status” to record the progress of the sale. From the “Actions” menu full mail merge letters relating to the offer, including a “Memorandum of Sale”, can be printed.

The “Offer” details also contain two related tabs labelled “Progression” and “Chain”.

The “Progression” tab allows the recording of all events that related to the sale of a property. Once added, an individual progress note cannot be changed.

The “Chain” tab allows the recording of details of the “Buyer’s Purchase” and “Vendor’s Sale” for the full chain.

Sales Progression Grid

The “Sales Progression” grid from the menu tree allows a negotiator to see full details about each property sale including the offer details and progress events.

Additional Grid Functionality

Some of the grids now include a “Merge Cells” option on the right-click menu. This allows repeating cells to be displayed as a single cell and allows the grids to be read more easily.

Currency Fields

Some currency fields now do not show the decimal point places.

Owner Payments

If owner payments are processed after the date of the current account period but before the current accounting period has been closed they will now be dated the end of the current accounting period to ensure they appear on the owner statement as part of the “Period End Routine”.

Reversing Transactions

Corrected an error when trying to reverse transactions.

Login Details

An option has been added to prevent the user login name from being displayed automatically. This might otherwise be a problem on a terminal server configuration.

Auctions

Various changes have been made:

- Added "Vacant/Tenancy" columns to the Property Auctions Grid
- Added "HIP Required" column to Property Auctions Grid
- The following fields have been added to the Auction Property:
  - Search Required?
  - Search Date Requested
  - Search Date Received
  - Inspected?
  - Guidelines : Advertised price
  - Negotiator name
  - Changed "Possession" to a drop-down list
- Removed the "Office Notes" field
- Added spell-checking to all description fields
- Re-organised the field layouts

Contacts

Added "(None)" to allow a "Title" to be cleared

Increased the length of the "Company Name" and "Payee" fields to 100 characters

Tenancy

Added an option to the Actions menu to open the current Owner Group

Corrected a bug where the "Main Contact" became un-ticked when a second tenant was added

Notes Grid

Added "Property" column

Works Orders

Added "(See Instructions)" as an option to the "Pick Up Keys From" list

Activate the "File : Print" menu option to allow the Works Order to be printed directly

Corrected an error when updating the "Instructions" notes

Added extra fields "Staff Name" and "Pick Up Keys From" to the "Works Order" job sheet data source.

Added the ability to create Mail Merge letters from Works Order details

Works Orders Grid

Added Contact and Communication

Added preview of the Instruction notes

Help Menu

Added a “Useful Links” option - This allows access to certain useful websites for documents and programs.

Chart of Accounts Grid

Added “Sequence Number” column

Mail Merge Templates

Identified a bug that causes “Veco” to close when creating or editing mail merge templates, or when running a mail merge routine. This was caused by a bug in the “Microsoft .NET Framework 2.0 SP1”. Removing SP1 corrected the problem, but a workaround has now been added.

Added a new option on the menu tree to allow the creation of mail merge “Clauses”. These can be used to define certain section of text that get included in mail merge documents. This is most useful when preparing Tenancy Agreements.

When creating a mail merge template, new mail merge fields allow the addition of particular clauses within the template. When running a mail merge for an individual record (eg a Tenancy) any clause field included in the template will prompt the user to select the relevant clause from the list of options.

Calendar Appointments

Any appointments that are “Completed” are now shown on the calendar with a “Tick” icon.

“Completed” appointments now do not activate the reminder message.

“Completed” appointments can now be removed from the Calendar by using a right-click menu option. A new parameter can be used to predetermine if completed appointments are normally shown or not.

Views

More options have been added to allow the dynamic selection of a date range when a date-related view is activated.

Main Tree

Corrected a problem where a parent node would not show if all the child nodes were removed as part of the department configuration.

Quick Lettings/Sales Property

When searching for (and finding) an existing contact the “Suitable Properties” option is not displayed.

Transactions by Nominal Grid

Added the “Accounting Period” of the transaction

Ownership

Increase the “Payee” fields to 100 characters

Banking (Cheques/BACS) Report

Now shows the BACS reference or the cheque number, as appropriate.

Database Backups

An option has been added to the “Admin” menu to allow the backing up of the SQL Server database at any time. All backups are stored in the “Backups” sub-folder.

An automatic backup is now made as part of the accounts “Period End Routine”.

Version 1.0.0.4 Changes (Released 13th March 2008)

Individual Contact/Property Calendars

It is now possible to add new appointments directly from the individual details forms.

Manual Web Uploading

Fixed a bug in the manual “Web Uploading” facility where the ZIP file was not being releases after creation.

The TOWN field has been added to the web feed details.

Added more validation to ensure the FTP procedure is more reliable.

Automatic Web Uploading

A new facility has been added to automatically send property details to websites (via Eurolink) every time a property is saved. Further details of this will be available separately.

Property Details

Corrected a bug that occurred when saving “Sales Marketing” details.

Corrected a bug where the property category was not saving corrected for a new property.

Added the ability to remove the Owner Group from a property if an Owner Group was added by mistake. This can only be done if no accounts transactions have been posted.

Corrected a bug where the “Gas” tick box was not saving correctly on new properties.

Appliances – Added a PAT tick box to indicate if an appliance is covered by PAT testing certificates.

Important Dates – Adjusted the alignment to make them easier to read.

Important Dates – Additional dates have been included for “EPC Renewal”, “HMO”, “Inspection/Visit”. These dates will automatically create a diary appointment.

Changed the wording of “Valuation” to “Market Appraisal” which seems to be the industry standard description.

Additional Marketing Descriptions – Added a “Rich Text” description field, which can be used for bullet points, etc.

Owner Group

Added new categories to indicate the nature of the group – “Landlord”, “Vendor”, “Freeholder”, “Leaseholder”.

Corrected a bug with surnames containing an apostrophe.

Tenancy

Added a check to ensure that only properties categorised as “Management” can be added to a tenancy.

Corrected a problem with the way deposit account balances were appearing on the Tenancy Accounts Summary.

Ensure the Rent Arrears balance is calculated when the tenancy is first loaded and shown correctly on the first page.

Added an “Arrears Follow Up” date and diary appointment, so that arrears can be chased.

Vacate Date – A diary appointment is now automatically created from the vacate date.

Quick Owner & Property

Added an option for the Owner Group category.

The ownership payment method is now automatically set to “Manual Cheque”. This can be changed on either the Owner Details or Ownership Details.

Properties Grid

Added an option to create appointments by right-clicking a property.

Menu Tree

Added new nodes for the various categories of Owner Group – eg “Landlord”, “Freeholder”, “Vendor”, “Leaseholder”.

Statements

Only show Owner Groups of “Landlord” and “Freeholder”.

Reports

Added an option on the Actions Menu to import and export reports. This will allow new reports to be easily transferred between systems.

Workflow

Corrected a bug when saving a new template.

Quick Lettings Applicant

Corrected a bug when matching to suitable properties on a “per week” range.

User Details

When changing a user from one department to another the system now asks if you wish the user “Form Access” security to change to the new department default.

Contact Details

The Supplier “PI Insurance” date is now not mandatory.

Added a “Reason for Moving” field to Sales Applicants.

Mail Merge Templates

Improved the speed of saving and validating a mail merge template.

Office Details

Ensure the “Rent Period” fields is entered otherwise errors occur on the property.

Transaction Postings

Corrected a bug where the decimal point seemed to reposition itself when entered analysis values.

Appointments

Added options to send the contact an e-mail, SMS, or mail merge letter.

Various Improvements to Data Grids

Diary Dates – Added a "Full Start Date" column that shows the date in words (long date format).

Tenancies/Deals – Added "Arrears Balance", "Rent Arrears Flag", "Arrears Follow Up", "Deposit Amount", and deposit scheme indicator.

Property/Estate Works Orders – Added name of the user dealing with the job.

Active Lettings Applicants – Added full "Areas", "Last Contact Date", "Next Contact Date" fields.

Active Sales Applicants – Added full "Areas" and "Next Contact Date" fields.

Chart of Accounts – Added "Heading" and "Sub-heading" fields.

Summary Balances - Added "Heading" and "Sub-heading" fields.

Ownership

Added an option to suppress the creation of statements for a particular owner within an Owner Group. This is to allow only one statement to be sent to owners at the same address: eg "Mr & Mrs".

Data Import

Added a facility to allow the importing of contacts and properties from other systems/databases. Contacts and Properties need to be provided as CSV files. The exact format for the CSV files can be provided upon request.

Grids

Currency fields (eg "Rent", "Balance") are now formatted as correctly with currency symbol.

Grids with accounts data now include a "footer" to allow for the calculation of totals; average; etc.

Quick Contact Forms

Now allow for a second communications method.

"New Appointment" Date Bug

Corrected a bug where th "New Appointment" option from property grids displayed the wrong date.

Auctions System

Various changes:

- From the "Auction Properties" grid, double-clicking on a property now brings up the full Property Details instead of just the Auction Details of the property.
- Following a discussion about what conditions have to occur for a property to be allowed to be entered into an Auction we decided that a property is only eligible for entry when it has been "Instructed". We have therefore changed the "In" date to "Instructed".
- The "Instructed" date now appears on the list of properties entered into an Auction.
- Because the "Legal Pack" consists of a number of separate stages, each having a "Requested" and "Received" date, we decided to keep the "Legal Pack Requested" and "Legal Pack Received" dates, but recommend that a "Workflow" be used to monitor each individual stage of a legal pack preparation. Any documentation could be prepared and monitored by using TaskCentre.
- As some properties do not require a "HIP" we have added a "HIP Required?" flag. If a HIP is not required the "HIP Requested" and HIP Received" dates are disabled.

- We have added a “Legal Pack Paid By” option. Options can be set as drop-down “Types”.
- A new option for “No Mortgage Provided?” flag has been added to distinguish between properties that have no mortgage with those where details have not been provided by the vendor.
- To separate out marketing and financial fields, a new “Financial Details” TAB has been added.
- A field has been added to indicate whether the property is “Vacant” or “Tenanted”. If “Vacant”, “Key Requested” and “Key Received” dates can be entered. If “Tenanted”, “Tenancy Requested” and “Tenancy Received” fields can be entered.
- A fields has been added to indicate the type of lot – “Residential”, “Commercial”, etc.
- A drop-down field has been added to the Auction Marketing details TAB to indicate the viewing arrangements. Options can be added as “Types” – eg “Contact Auctions Department”, “Open Site”, “External Viewing Only”.
- A field for “Viewing Arrangements” has also been added for internal notes.
- A flag has been added to indicate if the property is part of a “Lot” of multiple properties. If more than one property is available as a single lot, the same “Initial Lot” number must be assigned to each property in the lot. After auction, only the property that has been assigned the guideline price will be shown on the “Auction Results” TAB.
- A new “Available Auction Properties” grid has been added showing descriptions and photos of the currently available properties in the latest auction.

Version 1.0.0.3 Changes

Quick Forms

A new search facility has been added to all "Quick" data entry forms. This allows the database to be checked for possible duplicates before a new record is created.

Owner Group

A new flag has been added to the Owner Group form to signify if "Interim" statements are required. This flag is also shown on the "Statements" grid and can be filtered to allow interim statements to be printed only for those owners that would like a statement with each payment.

Owner Statements Grid

Added the "Interim" flag as entered on the Owner Group form.

Power Grid

A "Footer Row" now appears at the bottom of the Power Grid results window. It is possible to right-click the Footer Row at the bottom of each column and then perform certain functions on the columns. Eg a value column can be SUMed.

Transactions by Nominal

This grid now shows the Office name.

While You Were Out

The grid now has an additional column to indicate if the message has been viewed.
Non-viewed items are shown in bold type.

The "While You Were Out" item on the menu tree now also shows the number of un-viewed items.

Tasks

The "Tasks" item on the menu tree now shows the number of outstanding tasks for the user.

Chart of Accounts

Fixed a bug preventing the deletion of an item on the chart of accounts.

It is only possible to delete a nominal account if it hasn't already been used within the accounts.

Diary Appointments

Fixed a bug preventing an appointment to be added if no area was selected in certain circumstances.

Each appointment now has a "Status" field which can be used to indicate if the appointment is "Provisional", "Confirmed" or "Cancelled".

Each appointment now has a notes field that can be used to record feedback.

When making an appointment such as a Viewing, it is now possible to see the property diary overlaid with the diary of the selected user. This is to ensure that double-bookings are minimized.

Receipts (SLP) Grid

We have added the ability to enter a date which is used to determine the date of the receipts and thus the accounting period in which the receipts should fall.

Payments (PLP) Grid

Added the option of choosing an accounting period to determine which period the payments should appear.

Owner Payments Grid

This routine will now only show balances calculated up to the current date, or the end of the current accounting period. This is to ensure that statements only reflect owner payments for balances occurring in the current accounting period. Future receipts are ignored.

The process of calculating the payments due to the owners has now been speeded up.

General Information

The number of licenses is now shown on the Company Details form, and the “Help : About…” screen shows the root “Veco” path.

Version 1.0.0.2 Changes:

Auctions

Various changes to the workings of the "Auctions" module - Including new property auction details; new tabs for allocating paddle numbers and processing auction results; and new reports.

While Out Were Out

Fixed a bug whereby only "logged in" users could be sent messages as opposed to all users.

Quick Forms

Added a new form for adding a new Owner and Property combination. Search facilities allow for the checking of duplicates.

Contact Grids

Corrected a problem where contacts were duplicated on the grid under certain conditions.

Scheduled Charges

This has been changed to allow for the selection of preset descriptions rather than entering free-format descriptions. New descriptions can only be added by users who are designated as "Manager".

Office/Tenancy Agreed Fees

We have added fields for fees "Frequency" and "Monthly Average".

Fees Forecast

Added the monthly average field.

Property Appliances

Added a "Warranty End" date.

Owner Group

A field has been added to indicate which day of the month the owner should be paid. This can then be selected on the Owner Payments grid.

Owner Payments

When making a payment to the owners a notification can now be made by e-mail or by SMS.

Statistics

A new facility has been added to show various statistics such as the number of viewings and valuations by office and negotiator. These statistics can be filtered by office and type and then shown on a graph.

This facility has been designed so that additional types of statistics can be added easily.

Changes to Accounts Details

When a contact's personal bank account details are changed, the data of the change is recorded. This allows for security auditing.

Import Applicants

A new routine has been added to allow applicant details to be imported from a CSV file or added directly via a website. Details of any new applicants can be verified prior to becoming “live”.

Please contact Eurolink for technical details of what information is required.

Parameters for E-mail and SMS wording

Within “Veco” there are various automated (and manual) processes for sending SMS text messages and e-mails. New parameters allow for the wording of these messages to be set as defaults.

This option can be found from the menu option “Admin : Parameters”

Grid Print & Export Disabling

For security reasons it is now possible for certain users to be prevented from printing or exporting contact and property grids.

Sales Applicants

Fixed a bug where requirements were showing duplicates.

Mail Merge Templates

Fixed a bug with a missing datasource.

Reports

Various bugs fixed when adding new reports.

Property Details Form

Added a tick box for “HMO”.

Corrected problem where “Web Status” not saving.

Corrected a problem where a blank owner row was appearing.

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