Veco Changes Document

Introduction

This document reflects all changes made to the “Veco” software and database starting from version 1.3.3.0. A list of previous changes is available upon request.

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

This Document Includes Details of all changes up to version number: 1.4.0.4

How to Install Updates

"Veco" database updates can only be installed by a Veco "Administrator".

To install an update, follow these instructions:

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

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

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

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

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

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

Any new changes to your database will be automatically installed.

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

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

New "layouts" and "reports" may be also downloaded as appropriate.

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

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

Veco Replimate™

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

Note

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

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 1.4.1.0

New Features

Additional Functionality

New Fields / Database Changes

Grid Changes

Raise Charges SLI (100559)

Added Due Day field from Charges.

Owner Balances (100567)

Added Owner Group Status field.

Improvements / Bug Fixes

Mail Merge Letters (100547)

Relevant property letters now include a shortened property address in the filename.

Works Orders (100557)

Added Action to open Estate by using Alt+E, and Property by using Alt+P.

Quick MA & Quick Owner/Property (100570)

Now checks to see is an email address has been entered before ticking “Email Statements” by default.

Version 1.4.0.4

Available Lettings Property Grid

Ensure From/To data filtering is actioned when producing the report.

Payments PLP

Fixed bug where negative Fees Pending where increasing the Available Balance.

Version 1.4.0.3

Freeholder Statements

Now work by Date Range rather than by Accounting Period.

Income & Expenditure Report

Added Net and VAT to the datasource.

Invoice Generator Grid

Credit Notes are now displayed on the grid as negative values.

Owner Statements

Stop old tenancies/properties being shown under certain conditions.

Version 1.4.0.2

Proxy Server

Implemented access to services via a proxy server.

Unknown Receipts Grid

Implement “Live” transaction rights.

Transactions (Save/New)

Correct issue with Allocations.

Owner Statements

Stop old tenancies/properties being shown under certain conditions.

Freeholder Group – Accounts Summary

Do not include reversed transactions in Cleared Unallocated Balance.

Batch Notes

Fixed error if attachment is an email message.

Gas Expiry Date

Corrected issue where changing the date kept prompting for a note

Negotiator Work Screen – Bulk Report

Corrected issue when prompting for embedded email.

.

Pivot Power Grid

Corrected error filling lists if the Select statement contains ‘from’.

Service Charge Budget Report

Corrected report issue where all accounts were appearing against all sub-departments in certain circumstances.

Version 1.4.0.1

Transactions (PLI)

Re-instate ability to have duplicate invoice/account numbers for relevant suppliers.

Version 1.4.0.0

New Features

Form Customisation

It is now possible to further customise forms by changing the text and colour of field labels. This is controlled from the “Admin” menu. Use this feature to rename the field labels on forms. The fieldnames used in the database will remain unchanged, as will the way fields are displayed on grids.

Field Validation

When saving details, any warning messages (eg for uncompleted fields) are now displayed immediately rather than individually.

Invoice Importing

Added a new Accounts Procedure to allow the importing of invoices from a CSV file.

Additional Functionality

BACS/Cheques

Added a parameter to allow the input of an email template for supplier remittances.

Bulk File Notes

Added the ability to create “Batch Notes”. This works in the same way as mail merge in that the records need to be selected and then use an “Actions” menu option to create the batch note.

Estate Accounts Processes

It is now possible to run “Accounts Procedures” for specifically selected Estates. If an Estate is selected, any of the accounts routines can be run specifically for that Estate without affecting any other Estate. This means that multiple users can process the same Procedure for different Estates at the same time.

Service Charge Demands & Budget Reports

Added a parameter to allow Budget Reports to be included when producing Service Charge demands.

New Estate Reports

The following Estate reports have been added:

- Income & Expenditure Summary
- Income by Transaction
- Expenditure by Transaction

New Fields / Database Changes

Properties/Units – Appliances

Added a Notes field

Tenancy Deposit

Added a new field for “No Deposit Held”.

Estate Inspections

Added a new field for Estate Inspections. This will also create an appointment.

Tenancy RLP

Added new field for “RLP Sold By”

Grid Changes

Tenancy Grid

Added field for “Non Housing Act”

Sales Applicants

Added field for “Buying Position” .

Asset Register

Added Notes field

WYWO Grid

Added right-click option to delete Viewed messages

Sales Progression

Added Applicant Name field

Initial Monies Grid

The Tenancy Amended Date and Amended By fields are now set correctly when making a tenancy live.

Available Properties Grids

Added a “right-click” option to show Viewing Arrangements.

Tenant communications are now included on the Communications “right-click” option.

Guarantors Grid

Added a new grid showing any contact designated as a Guarantor.

Invoice Receipts (CBR+PLP)

Added a new Accounts Procedure to process non-fee invoices by creating a CBR & PLP transaction combination.

Statement Grid

Added fields “Email Statement?” and “Has Email” columns.

Tenancy Balances

Added Deposit Amount column from the Tenancy details.

CNR Tax/CNR Transactions

Income and expenditure calculations now work by using the allocation date and not the transaction date.

Improvements / Bug Fixes

Contact Address Types

Unlocked the Previous Address options which can now be removed if not required.

Tenancy Details – Accounts Summary

Added Total Arrears amount

Appointments

Clicking on a date on the calendar will automatically change the appointment date.

Unknown Receipts

Correct an error when deleting property text.

Owner Group Details

If the Managing Office field is left blank it will be set automatically when a property is added.

Tenancies – Weekly Rent

Weekly Rent calculation is now rounded correctly.

Statements

Corrected an issue where Archived and old tenancies still show for previous owners.

Active Sales Applicants Grid

Corrected an issue where not all relevant properties were being shown under “Suitable Properties”.

Bank Reconciliation

Added a button to allow the printing of a reconciliation Summary Report.

SLI Owner Transactions

Added a new parameter to prevent allocations to SLI transactions that are future-dated. In other words, rents received early cannot be allocated until the rent due date.

Scheduled Charges

When generating SLI schedules (eg Rent) that covers a full tenancy period the final schedule line is automatically adjusted to take the tenancy vacate date into account, and apportions the rent accordingly. This is to allow the schedule to run correctly for tenancies where the rent due date is different to the start of the tenancy.

Tenancy Archiving

The question asked when archiving a tenancy now correctly cancels the whole process when the user does not wish to continue.

BACS/Cheques

Added a parameter “Banking Days” to indicate that the records in the BACS file should be forward dated by a given number of days to a future “Payment Date”.

Gas Expiry Date

A warning is now displayed if a new Gas Expiry Date is greater than 13 months after the current date.

Related Contacts

When adding a new related contact (which doesn’t already exist) the “Category” field on the contact form is automatically disabled.

Tenancy Deposit Schemes (and options)

Added a parameter to ensure that a least one of the deposit schemes (and other options) is ticked.

Owner Group Statement Narrative

Added Owner Group tick box to allow the statement narrative to be cleared when a final period statement has been produced.

Supplier Invoice Transactions (PLI)

When entering a batch of PLI transactions (using the “Save & New”) button the supplier and date now default to the supplier and date of the previous invoice to save time when entering batches of invoices from the same supplier.

Tax Transactions

A property must now be selected when entering a manual tax transaction.

PLI Invoice – Quick Pay

Corrected an issue where the same invoice could be paid more than once.

Properties/Units – Edit Owner

Corrected an issue where changes to Owner details could not be made because the number of properties was being validated.

BACS/Cheques

Estate CBP transactions where an override payee has been entered are now included in the BACS/Cheques processing. They are marked on the grid as “Estate”.

Version 1.3.9.5

Payments (PLP)

Allow for periodic tenancies when calculating available deposit.

Version 1.3.9.4

Transactions

Correct error when changing/setting the sub-department while in “Edit” mode.

Statements

Correct calculation of Total Fees Brought Forward – picking up duplicate allocations.

Version 1.3.9.3

Company Details

Correct error when changing communications.

Calendar

Correct reloading issue when pop-up calendar is showing.

Version 1.3.9.2

(Bespoke version – not released)

Version 1.3.9.1

Owner Groups

Correct error message when archiving.

Version 1.3.9.0

New Features

Delay Payment – Owners

Added a field to Owner Groups to allow the delay of processing rent receipts until 1 month following the due date of the rent.

Archiving

Various check are now made when archiving Contacts. Properties, Owners,Tenancies and Estates, to ensure all related records have also been archived and there are no outstanding items or balances, etc.

Drag & Drop

It is now possible to drag & drop items from Outlook into Notes and Emails attachments.

HTML Marketing Emails

Version 1.3.8.0 introduced the ability to send matching property details as HTML emails rather than as PDF attachments. The quality of these emails can be improved by inserting headers and footers, and by using hyperlinks to connect to further details on websites or Rightmove, etc. Please contact your account manager if you would like us to provide a quote for tailoring your HTML emails.

Additional Functionality

Grid Grouping

Added parameter to allow grouped grids to be loaded opened to record level.

New Fields / Database Changes

Appointments

Added a field for Importance. The drop-down option can be configured using the Types menu option.

Grid Changes

Tasks Grid

Corrected problem with missing right-click options.

Workflow/Tasks

Notes are now displayed in a preview window.

Leaseholder Groups

Added the ability to Mail Merge from the Actions menu.

Repairs

Added the ability to filter by user.

Applicants Grid (Areas)

Optimised the display of applicant areas.

Workflow

Added the ability to delete workflows.

Diary Dates

Added Importance column.

Freeholder and Leaseholder Contacts

Ensure archived Owner contacts are not shown on the grids.

Fees Invoiced

Group totals now include the Net and VAT amounts.

Tenancies

Legal Insurance field is now picked up from the tenancy details rather than property details.

Improvements / Bug Fixes

Freeholder Statements

Added Property Order field to data source to allow properties to be shown in the correct order.

Quick Sales Applicant

Added the ability to select “All” types of property.

Popup Calendar

Corrected an issue with not being able to delete appointments.

Emailing Statements

It is now possible to attach additional documents when emailing statements.

Popout Notes

This now works by clicking with the mouse rather than by hovering.

Additional Negotiators

Added a parameter to not automatically select the areas related to the Buddy Negotiator.

Offer Progress

Current Offer Status and Amount are now automatically recorded each time Progress is added.

BACS/Cheques

Added a parameter to stop the BACS/Cheques routine from being re-run until unlocked by an Administrator. This parameter is controlled from the Account Parameters. Additionally, if a BACS/Cheques routine is re-run a log entry is made.

Properties/Units – Document Distribution

Corrected an error removing documents.

Statements – Tenancies

Added the ability to include tenancies with no bank movement up to the point where the tenancy is archived.

Version 1.3.8.3

Statements Fees

Correct calculation of Fees Carried Forward

Bulk Invoicing

Analysis description not being filled correctly

Tenancy Grids

Added parameter to limit searches by Office Region

Version 1.3.8.2

Tasks

Correct error when processing Tasks grid.

Version 1.3.8.1

Appointments

Correct error when saving Key dates and Follow Up appointments

BACS/Cheques

Correct error sending Supplier Remittances by email if email address not valid.

Version 1.3.8.0

New Features

Additional Functionality

Report Editing

Added options to allow reports templates to be backed up before making changes, and to restore from a previous version if necessary.

Notes and Emails

Added the ability to drag-and-drop documents as attachments.

Demand Printing

Added the ability to select which template to use for printing.

Supplier Invoice Printing

Added the ability to select which template to use for printing.

Utility Payments

Added a new field to Supplier Details ("Non-grouped Payments") to allow BACS/Cheque payments to be processed separately for each invoice payment rather than grouped as a batch. The reference used on BACS payments will be the purchased ledger invoice number which can be used to hold the utility bill Account Reference.

If this box is ticked on Supplier Details the Account Number can be entered when posting the invoice instead of an Invoice Number, and duplicates are allowed.

Single Property per Owner Group

Added a parameter to limit each Owner Group to a single property.

New Fields / Database Changes

CRM Contacts

Added a "Do Not Email" field to CRM details.

Statement Invoices

Added a field to the Owner Group to indicate if invoices are required when emailing/sending statements.

Utility Payments

Added a new field to Supplier Details ("Non-grouped Payments") to allow BACS/Cheque payments to be processed separately for each invoice payment rather than grouped as a batch. The reference used on BACS payments will be the purchased ledger invoice number which can be used to hold the utility bill Account Reference.

If this box is ticked on Supplier Details the Account Number can be entered when posting the invoice instead of an Invoice Number, and duplicates are allowed.

Grid Changes

Fees Received

Show owner group reference and transaction narrative on grid.

Owner Contacts

Added the Owner Source field.

Negotiator Workscreens

Added right-click options to applicants and properties to show previous viewings with feedback.

Added “Specific Requirements” field to applicant details grid.

Owner Group

Added field to indicate if owner is Landlord or Vendor

Chart of Accounts

Added bank account sort code and account number

Diary Dates

Added an option to only show Today’s items.

Added the Created By field.

Owner Payments

Added a field to indicate the owner Paying-Out Method

CNR Tax

Added Contact Title, First Name, Surname and Company Name.

Improvements / Bug Fixes

Date Changes

Added a parameter to prompt for a note whenever a key date is changed. Similar to the prompt when changing a Gas Expiry date.

Workflow Templates

It is now possible to assign a default user to each task on a Workflow Template.

Bank Reconciliation

The Bank Reconciliation form is now modeless – it can be minimised while other operations are carried out.

The Bank Reconciliation can now be finalised even if the reconciled balance is negative.

Works Orders

The Works Order form is now modeless – it can be minimised while other operations are carried out.

Appointments

The Appointments form is now modeless – it can be minimised while other operations are carried out.

The appointment subject now includes the property address if relevant.

A parameter has been added to enforce the entry of Feedback before an appointment can be completed.

When dragging appointments on the Calendar a warning message is now displayed.

The End Date is now changed automatically if a new Start Date is entered.

Supplier Refund (PLR) Transactions

The Net and VAT amounts are now shown as separate figures.

Tenancy Break Clause

Added options for: Fourteen, Sixteen, Twenty, Twenty-Four and Twenty-Six months.

Owner Income and Expenditure Report

Suppressed and deleted transactions are not now included on the report.

Calendar

- Ensure the calendar always defaults back to the current date.
- When dragging an appointment a warning is now displayed.
- Added a parameter to make appointment feedback mandatory.
- If an appointment is linked to a property the subject now includes the property address.

Supplier Discounts

When posting purchase ledge invoices it is now possible to override the default Supplier discount rate with either a new percentage rate or a fixed amount.

Negotiator Workscreens

It is now possible to open both sales and lettings workscreens at the same time.

Payments (PLP)

Added a parameter to allow fee invoices to be paid regardless of whether there are outstanding Works Orders.

Statements

Removed the word ‘Final’ from the statement PDF.

Version 1.3.7.0

New Features

Additional Functionality

Custom Fields

It is now possible to create customised “drop-down” selection fields. The contents of these fields can be configured using “Admin : Types”.

New Fields / Database Changes

Grid Changes

Raise Charges (SLI)

Now includes fields for Management Office, Tenancy Office, and Tenancy Vacate Date.

Mail Merge Clauses & Prompts

It is now possible to delete Clauses and Prompts.

Property Keys Held

Grid now has the ability to filter by regional office.

Unknown Receipts

It is now possible for multiple users to access and process items on the Unknown Receipts grid.

Owner Income and Expenditure

Added field indicating the “Main” owner contact in an Owner Group.

Improvements / Bug Fixes

Communications

When adding new communications prompts are automatically given for “Email” and “Mobile”.

Communications accessed from the Tenancy grid does not now include non-active or moved-out tenants.

Note Types

Added a parameter to set the default Note Type

Accounts Drill-Down Summary

Where appropriate the “Date From” and “Date To” fields are shown on the summary report.

Note Types

Added a parameter to allow the Type/Sub-Type to be amended on existing Notes.

PLI Scheduled Charges

Corrected wording on PLI Schedule Grid: Now read “Amount (inc VAT)” instead of “Amount (exc VAT)”.

Office Areas

It is now possible to select office areas in Office Details by incremental search.

Payments (PLP)

PLP transactions created from the Payments (PLP) grid now take on the same Sub-Department as the originating PLI transaction.

Main Tree

When opening the “My Veco” tree options the “Eurolink” tree options are now automatically collapsed when the “Auto Collapse” parameter is set.

Owner Income & Expenditure Report

The datasource has been amended to allow for dynamic office header and footer images.

Also, added “Owner Group Title” field.

Tenancy RLP (Insurance) Supplier

If Legal Insurance is ticked it is now mandatory to enter an RLP Supplier.

Select Bank Form

The Select Bank form that appear on Owner Group, Estate, and Tenancy details now displays the bank accounts in Account Name order.

Workflow Tasks Grid

The Tasks grid now shows items colour-coded to indicate Completed, Part-Completed (ie Notes added), and Overdue items.

Break Clauses

Tenancy Break Clause values of 18 months and 24 months have been added.

Tenancy Deposit Account

It is now possible to set one of the bank accounts in Chart of Accounts as the Default Deposit Account. When adding a new tenancy the Deposit Bank Account will automatically be set to this default.

Quick Monies Contacts

The choice of Contacts when entering items on the Tenancy Quick Monies now includes the current owners.

Note Follow-Ups

Appointments created automatically when entering a Follow-Up date on a Note now take on the same Sub-Type category as the original Note. This allows for the appointments to be identified more easily. To use this feature it is important that the list of Appointment Sub-Types is the same as the list of Note Sub-Types.

Tenancies/Deals

Added “Break Clause” values for “Twelve” and “Eighteen” months.

Corrected error if standing order reference contained an apostrophe.

Chart of Accounts

Added “Default Deposit Account” field to allow a deposit account to be set automatically when entering a new tenancy.

Quick Monies

When selecting a transaction that requires a contact to be selected, the option is now given of choosing an owner contact as well as a tenant contact. This will allow payments/receipts to be identified as being made to/from an owner as well as a tenant.

Also, corrected an error with PLI/PLP transactions where the Net amount was being used when checking the Available Balance instead of the Gross amount.

Parameters (EPC)

Added a new field called “EPC Wording” to allow for additional wording to be added to marketing reports and window cards. These reports also now include fields for “EPC Reference” and “EPC Wording”.

Applicant Contacts

If parameter is set, the “Applicant Source” field is mandatory.

Calendar

Check for reminders “refiring” which cause the calendar to refill multiple times.

Quick Sales MA

Corrected “Error on load”.

Suitable Sales Applicants

Properties report was picking up the lettings short description and area.

Owner Group/Owners

Corrected a problem with start/end dates when adding additional owners.

Version 1.3.6.7

Version 1.3.6.6

Owner Income & Expenditure Report

Allow for dynamic header/footer images in datasource.

Statements – Sub-Report

Correct blank report when emailing statement.

Version 1.3.6.5

BACS/Cheques

Correct field length in BSCHOBS output file.

Version 1.3.6.4

RTF Mail Merge

Correct “Out of Memory” error.

Version 1.3.6.3

PDF Split

Correct error when splitting PDF files.

Version 1.3.6.2

Quick MA

Correct error on validation.

Version 1.3.6.1

PDF Splitting

Corrected issue with PDF splitting – incorrect DLL version.

Sales Properties

Correct error saving and uploading to PortalPal.

Version 1.3.6.0 (5/3/2012)

New Features

Enhanced Login Security

It is now possible (via direct access to the database) to set a limit on the number of login attempts a user may make before the user account becomes locked. Should a user account become "Locked" it can then only be unlocked by an administrator. If this feature is used, the system will record every time a user logs in, out, or attempts a login.

Additional Functionality

Appointments

A warning is now given if an appointment clashes with existing appointments for the relevant user.

Accounts Summary – Statements

Added the ability to show the effect of any draft transactions on the balance.

Marketing HTML Descriptions

Added a new description field on both sales and lettings properties to allow the entry of a description containing HTML formatting. If these are used they are uploaded to PortalPal instead of the standard Marketing Description fields.

Contra Transactions

Added an option to "Contra" a transaction outside the current period. This is similar to the "Reverse" option but can be applied to unallocated SLI, SLN, PLI and PLN transactions and will create the contra transaction and automatically allocate against the original. SO, a contra'd SLI will create a SLN and vice-versa, and a contra'd PLI will create a PLN.

Pre-Paid Invoices

Sometimes, contractor invoices may be paid by standing order or direct debit. Eg for insurance premiums. To avoid having to enter the premiums each month it is now possible to set them up as a Scheduled Charge. However, as they may be paid directly from a client account it is important that the invoice payments do not appear on the Cheques/BACS processes otherwise they may be paid twice. To avoid this a new payment category of "PrePaid" has been added. It is now possible to tick a box "PrePaid?" on the PLI scheduled charge to indicate that the invoice should not appear on the Cheques/BACS process. On the Cheques/BACS process a new payment queue of "PrePaid" allows for a report to be produced showing all invoices which have already been paid direct from the bank account.

New Fields / Database Changes

Parameters

The details of who and when amendments are made to parameters are now stored.

Tenancy Details

Added new fields for RLP (Rent & Legal Protection): "RLP Supplier" is a drop-down field controlled by "Types" to identify the supplier of the legal insurance, and "RLP Commences" indicates the insurance start date.

Property/Units Features

Added “Featured Property” field. This is also uploaded to PortalPal.

Grid Changes

Keys Held

Keys marked as “No Longer Held” do not now appear on the grid.

Tasks

It is now possible to create Views from the Tasks Grid.

Property Voids

‘End Date’ now defaults to the current date to avoid confusion.

Owner Income & Expenditure

Additional filtering columns have been added to this grid:

Property Managing Office
Property Portfolio Reference
Last Movement Date (based on monies in/out transactions for the property)

Power Grids

When using a Power Grid to generate transactions it is now possible to assign the transaction narrative dynamically from a grid field.

Improvements / Bug Fixes

Property/Units – Sales Offers

Added column showing last progress date.

Works Orders

As well as showing the tenant and owner details the “Contact” field now has an option for “See Instructions”. This can be used where the supplier needs to make contact with someone other than the tenant or owner.

When emailing a works order the PDF is now attached to the note.

Mail Merge Templates

To make it more obvious who is the primary recipient of a letter a field has been added showing the main contact type.

Dates Tab – Main Forms

When using the grouping facility the grid now shows the number of records.

Mass Email/SMS

After selecting a batch contacts to receive a mass email or SMS it is not obvious who has been sent the email or SMS. Therefore, any contacts who have not been processed (because they may not have an email address) will remain ticked on the grid.

Mass Mail Merge

It is now possible to indicate the address of the property on the email Subject line, where applicable, By adding **[PropAdd]** to the end of the Subject line.

Notes

Emailing a document from Notes now creates a new note.

BACS Format

It is now possible to link each bank account in Chart of Accounts to a different BACS template for different banks. This is required by companies who have more than one bank account but with different banks. Should this field be left blank the system will pick the default format from the accounts parameters.

Transaction – Allocation Tab

Added column for transaction invoice number as this is potentially more useful than a transaction reference.

Email Footer Text

The fields for [UserName] and [EmailSignature] now merge correctly when sending general emails.

Tenancy Allocation Reports

Two new reports have been added to show how tenancy receipts are allocated against demands, and how demands have been allocated against receipts. These reports are available from the Tenancy : Actions : Reports.

Emailed Statements

Tightened up the check for invoice attachments when emailing statements to avoid errors where an invoice PDF may have been deleted or moved.

Estate Properties

The property sub-tab on the Estate form now includes any properties where the leaseholder group has not been assigned.

Tenancy/Deals

- When adding tenants to an existing tenancy a prompt is now given to change the tenant address.

- When making a tenancy Active a prompt is now given to change the tenant addresses.

Freeholder Statement

The Arrears B/Fwd balance has now been separated from the Due this Period column.

Property Tenure

This field is now uploaded to PortalPal.

Contact Names

It is now possible to exclude the “Title” field (previously mandatory) as long as there is a First Name and Surname. If there is only a Surname the Title must still be entered.

Owner Source and Type

Parameters have been added to allow these fields to be mandatory.

Tenancy – Tenant Details

The “Main” tenant contact is now shown at the top of the list of tenants on a tenancy.

Owner Group – Owner Details

The “Main” owner contact is now shown at the top of the list of owners on an owner group.

Tenancy Status Log

Ensure entries in the tenancy status log are shown in reverse date/time order.

BACS Formats

Added provision for the Bank of Scotland (HOBS) format.

Property Import

Added provision to import additional fields:

Number of Bedrooms
Asking Price/Rent
Furnished Status
Summary Description
Features 1 – 10

Version 1.3.5.3

Suitable Sales Applicants – SMS Properties

Corrected Area and Short Address being picked up from lettings details.

Word Mail Merge

Corrected Email Signature not being picked up.

Freeholder Statements

Corrected Units with no movement not being included.

Version 1.3.5.2

Lettings Marketing Details

Correct 'Parking' details being cleared.

Budget/Actual Report

Correct Budget not showing correctly.

Service Charge Statement

Corrected FB Balance

Version 1.3.5.1

Available Sales Properties Grid

Correct Error 91 when going into grid.

Negotiator Work Screen

Corrected problem creating Views.

Statements

Correct error with ambiguous column name 'AddressTitle'

Version 1.3.5.0

New Features

Estate Reports

New estate reports have been added to the Estate "Actions : Reports" menu. The following reports have been added:

- Trial Balance
- Budget v Actual Expenditure
- Creditors
- Debtors
- Cash Book

Telephone System Integration (for Incoming Calls)

A new feature has been added to allow integration with an IP telephone system to search for contacts when incoming calls are detected. The feature works by accepting an incoming telephone number from the telephone system software in the form of a "macro". A "macro" is a sequence of automated key strokes passed to a software package. In the case of Veco the telephone system software needs to send the key sequence as follows:

CTRL+F10 followed by **incoming phone number** followed by **ENTER** (or **ALT+S**).

Eg **CTRL+F10 01372389250 ENTER**

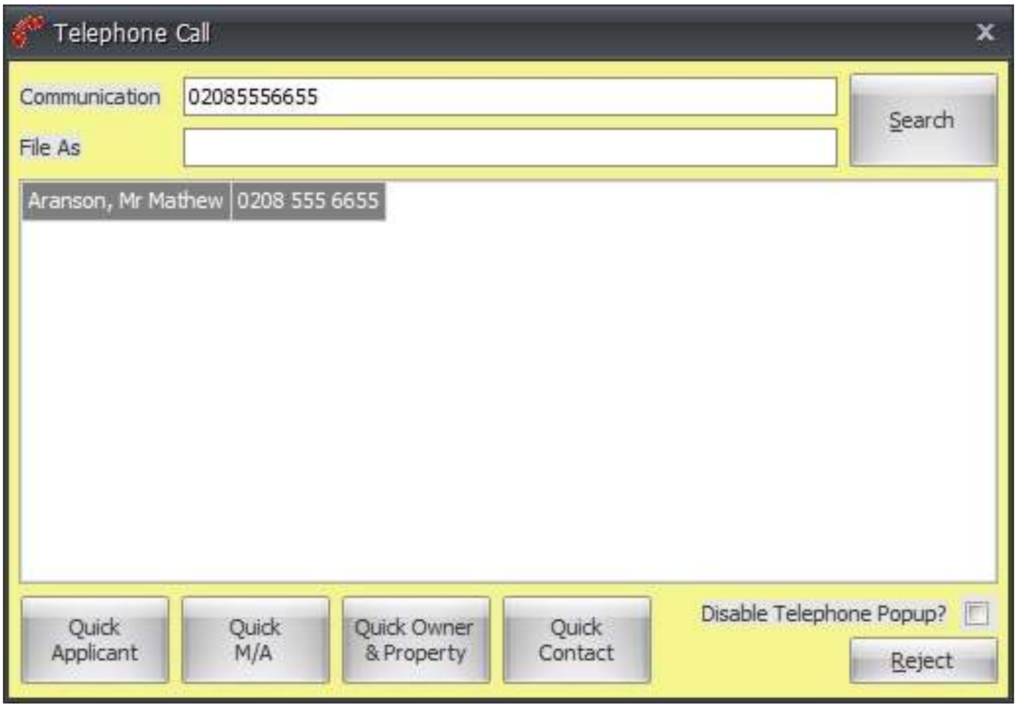
This "macro" will automatically invoke a pop-up form that will search for the incoming number and then display any matching contacts. From here the user can either open a matching contact, or, if the number is not found, a new contact can be added by various methods (see screen shot below).

A note is automatically recorded against the contact when a contact is opened this way.

A system parameter has been added to enable or disable this feature globally, and can also be enabled/disabled by individual users by using the "User : User Details" menu option.

To avoid disrupting major processes this feature is automatically disabled during routines such as mail merging, payments, statements, etc.

This feature can also be used manually by pressing the CTRL+F10 keys at any time. A contact can be searched by any type of communication (partial phone number or partial email address), or by partial name.



Additional Functionality

Quick M/A

When adding a new property for an existing owner a prompt is now given to either add the property to one of the existing Owner Groups, or to create a new Owner Group.

Default SMS Template

A new parameter has been added under "General Parameters : Email & SMS Drafts" to allow a default SMS template to be defined. This allows the following fields:

[UserEmail], [UserTel], [UserMob], and [OfficeName]

Power Grids

Added a Right-Click option to allow bulk emailing to contacts shown on the grid. A ContactFK or ContactPK field must be included in the power grid so that the system knows which contact to attach a note to.

New Fields / Database Changes

Property Details

Added fields for "Lift" and "Basic HMO"

Added fields for "Bathrooms", "Receptions", and "Fee" to Marketing Lettings details

Added fields for "Outside Space", "Parking", and "Fee" to Marketing Sales details

Contact – Supplier Details

Added key date field for "Gas Safe Expiry"

Added key date field for "NICEIC Expiry Date"

Tenancy – Deposit Details

Added a new field to indicate if tenancy is “Non-Housing Act?”. When ticked, all the Deposit Scheme fields are automatically unticked, and remain locked.

Mail Merge – Data Sources

Fields for guarantor details have been included in the Tenancy & Main Contact data source.

Owner Group –CNR References

Added a single Owner Group field combining the CNR references for each Owner. This can be included on statements as a single field.

Estate – Payments Account

Added a new field to indicate from which bank account payments are automatically made.
This defaults to the same account as the “Holding Account”.

Tenancy Details

Added new fields:

- Length of Tenancy now allows for Days.
- Notice Period
- Number of Weeks Deposit – when used this will calculate the deposit amount.
- Weekly Rent – is now stored as a field

Grid Changes

Available Properties Grid

Hovering the mouse over a property on the grid now shows the full address of the property.

Available Lettings Properties Grid

Added date range parameters to allow searching for properties available between two dates.

Draft/Live Transaction Grids

Added a Category field to highlight which Quick Monies category was user to create the transaction.

Tasks Grid

Added the ability for certain users to adjust the Target Date field. This ability is restricted to managers to avoid users manually adjusting their own target dates.

Added a right-click Communications option.

Diary Projection & Diary Dates Grids

Added a parameter to suppress Key Dates from these grids.

Estate Contacts

Added two new grids showing Freeholder Contacts and Leaseholder Contacts

Repairs Grid

Added a right-click option to allow the creation of Views.

Payments (PLP) – Owner Dept

Double-clicking on a transaction now opens the Owner Group Accounts Summary.

If an Owner Group is “On Hold” no PLI transactions are now shown.

Fees Pending

If an owner group is “On Hold” only fee invoice (PLI) is now created. Fee is not paid.

Owner Group Grid

Added column to show if the Owner Group is “On Hold”

While-You-Were-Out (WYWO)

Added columns to indicate what the WYWO is related to.

Owner Group Account Balances

Correct issue with missing bank balance dates

Suitable Applicants

Added a right-click option to access Recent Notes.

Appointments

Added a user-definable field for “Location”. This field is also shown on the various calendar/diary grids.

Calendar

Hovering over an appointment on the calendar now shows the full description.

Applicants Grids

Added right-click option to select and archive applicants.

Improvements / Bug Fixes

Estate Budget

When adding a new budget, or changing the values of an existing budget, the Property Scheduled Charges for service charges are updated by adding a new schedule line where ones doesn’t already exist, or updating the values for an existing un-generated schedule lines.

A new menu option has been added to “Check Schedule Lines” which ensures a new schedule line is added to Property Scheduled Charges where necessary.

Changing the name of an Estate Sub-Department now correctly adjusts the budgets.

Raise Charges (SLI)

Ensure the Raise Charges routine will continue to raise Estate and Freeholder charges even if the “Continue to Charge” box is not ticked.

Property - Scheduled Charges

Changed the format of the grid to include the sub-department and status fields, and remove the value field because it did not reflect the values in the schedule.

Appointment Attendees

Correct problem where email not being sent to attendees from different offices.

Offers & Sales

The Sales Fee now allows for values to 2 decimal places.

Communications

When selecting the Communications window from a grid and choosing to send an email, the correct email address is now shown on the email form.

Estate PLI transactions

Added a parameter to allow any expense account to be selected even if it is not part of a budget. This applies when selecting an Estate Sub-Department.

Property Details

Added a parameter to stop the property rent and frequency fields from being automatically updated from the Tenancy details.

Agreed Fees

Creating a Scheduled Charge from the Agreed Fees tab now pulls through the correct VAT rate from the supplier details.

Negotiator Work Screen (Lettings)

- Changed the wording on the “Quick Property Match” form - “Required From” changed to “Required By”. This is just a wording change because the process works as if the date is “Required From”.
- Added date range fields for searching properties.
- Added “Any” property type option on Quick Applicant Match.

Audit Mate

When a key date is changed (eg Gas Expiry) the actual old and new date is now recorded rather than the GUID field.

Property – Scheduled Charges

It is now possible to change the Frequency field when selecting Service Charges.

Transactions – Estate PLI

Corrected error when posting Estate supplier invoices using the “Save & New” button

Tenancy – Deposit Details

- A parameter has been added to enforce the selection of deposit scheme details.
- When changing the deposit details (eg deposit scheme) a reason is now required.
- Added field for Landlord Membership Reference

Power Grids

Added a Category field to make is easier to select certain types of Power Grid.

Added the ability to use certain user parameters within the Power grid design to make it easier to restrict data when running the Power Grid. The parameters that can be used are: {UserName}, {UserID}, {OfficeName} and {OfficeID}.

Added the ability to complete a series of Works Orders as part of the Bulk Invoicing routine. The WorksOrderPK must be present on the grid.

RTF Mail Merge

Corrected a problem where the same prompt was requested each time it appeared in a mail merge run.

Owner Groups

Added a parameter to control if it is possible to add a 0% owner to an existing owner group.

BACS Export Files

The BACS export files now show the reference name of the bank account.

Notes – Document Preview

To make it easier to find documents for emailing, a new feature has been added to the Document Preview function in Notes. When previewing, it is now possible to select up to 5 documents and then attach these documents to an email.

Grid – Find (Ctrl+F)

Corrected an error which caused the Ctrl+F feature to stop working after using the Notes grid.

Property Notes

A new column has been added to differentiate between Notes, Appointments, and Progress.

Estate Related Contacts

It is now possible to add any type of contact as an Estate Related Contact. This allows existing leaseholders to also be added as management company directors.

Repairs Form

Resizing the form now correctly re-positions the Works Orders buttons.

Mail Merge (Word Version)

Corrected a problem where the user signature would only be processed once in a Word template.

Transaction Suppression

It is now only possible to suppress transactions that relate to the same accounting period to avoid causing problems with the brought forward balance on statements.

Statement Fields

Added Tenancy Occupied Date and Vacating Date to the statement data source.

Added a special field called "Header Text" built from a SQL view called "qryStatementHeaderText". This can be tailored as required to provide a text field containing data that cannot be normally shown on a statement. For example, this field could contain a list of tenancy names and arrears balances, which could then be shown at the top or bottom of a statement.

Owner Payments

Added a parameter to prevent the owner name from appearing in the transaction narrative.

Invoice Generator

The note that gets created when invoices are generated now contains the invoice number.

Transactions – Inter-Account Transfer

Suspense accounts can now become overdrawn according to the parameter setting.

Transactions (SLR)

Ensure the BankFK field is recorded so that refunds are shown on Service Charge Statements.

Quick Applicants

Added parameters to allow the applicant Source and Address fields to be mandatory.

Tenancy Details & Rent Charges

If a Tenancy Vacate Date is reduced the Schedule Charge for rent is adjusted accordingly as long as the rent has not already been charged.

Version 1.3.4.3

Property Details

Added a parameter “Update Property Rent Details” to make it an option to update the property rent and frequency when the tenancy changes.

RTF Mail Merge

Corrected a printing error when using the Tenancies & Related Contacts data source.

Version 1.3.4.2

Property Gas Date

Correct problem with not being able to add a Gas Expiry date where existing field is blank.

Version 1.3.4.1

Statements

Correct ambiguous column name ‘Title’

Version 1.3.4.0

New Features

User Details

A new user parameter has been added to allow the main tree menu to be locked for users of the “My Veco” toolbar.

Additional Functionality

SMTP Emailing

Where a user is configured to send email direct to the internet using the SMTP protocol rather than via Outlook it is now possible to select the “From” address from a pre-defined list of email addresses.

This is useful when you want to send a general email, maybe to a group of contacts, but need any reply to come back to a generic address (ie An office email address). This is not possible when sending email via Outlook because the “From” address is automatically defined within Outlook.

Negotiator Work Screen

Added a “Quick Applicant Match” facility to allow a list of applicants to be selected from manually entered property criteria.

Automate Tasks

It is now possible to select the type of note to add when an AutoMate tasks is processed.

Quick Applicants

It is now possible to add Joint Applicant details one the main applicant has been saved. The Joint Applicant becomes a Related Contact of the original.

New Fields / Database Changes

Office Details

Added new fields for Lettings Manager and Sales Manager

Tenant Contact

Added fields for “Failed Reference”, “Re-Reference Required” and “Contents Insurance”

Property Details

Added fields for “Buildings Insurance” and “Contents Insurance”.

Property Lettings Details

Added “Students Allowed” field

Grid Changes

Grid Refresh

Grids can now be refreshed by using the F5 function key.

User Details

Added a column for the User Initials.

Available Lettings Properties

It is now possible to filter on the Asking Price.

Sales Progression

Offer Date and Progress dates are now shown as DateTime fields.

To make this grid more flexible it is no longer automatically grouped by Offer Status. Instead, the grid layout function allows user-defined grouping.

Tenancy/Tenant Grid

- Tenant name no longer shows a comma at the start for companies.
- Added a field showing the number of tenants

Notes Grid

Added “Find” button to allow the searching of all notes containing a particular keyword. A date range can be specified, as can the user name and note types to search in.

Various Properties Grids

Added “Buildings Insurance” and “Contents Insurance” fields

Suitable Applicants

Added “Registered Date” field

Suitable Properties

Added “Unselect All” option

Unknown Receipts

Closed a loophole where it was possible for more than one user to process items on the Unknown Receipts grid.

Repairs Grid

The grid now refreshes to correctly show items that have been viewed.

Added a status option for “All Active” that doesn’t show Completed or Cancelled statuses, so that the “All” option will now show all statuses.

Lettings Properties (Basic)

Added a parameter filter for “Current Status” to allow other statuses to be displayed other than “Available”.

Lettings/Sales Properties (Basic)

Added Marketing Description field to allow description to be searched for specific key words.

Improvements / Bug Fixes

Rental Frequency

Added an option for “4 Monthly”

Quick Applicants

When using the search facility it is now possible to search on a partial email address.

Repairs

The Repairs form can bow be “Pushed” or “WYWO” from the Actions menu.

Property Reports

Added an option to include the property address as part of the PDF document name.

Owner Groups

Opened up the ability to add a new owner contact to an existing Owner Group. To avoid accounting problems the new owner is automatically set to 0% ownership.

Contacts

Ensure the General Type field is correctly saved when adding a new contact.

Appointments

When the Contact/Owner/Tenancy details are added to the description, they are now marked accordingly.

Also, ensure the Communications button includes all relevant communications.

Negotiator Work Screen

The Quick Forms functions are no longer “Modal”. This means that a Quick Form does not need to be completed and can be minimised to allow additional functions.

Offers & Sales

An initial “Progress” entry is now automatically made when adding a new Offer.

Progress and initial Offer dates are now automatically recorded as DateTime fields and are not user selectable.

Transaction Editing

When editing a transaction a reason must now be entered. This can then be viewed on the Actions menu.

Applicant Sharing

It is now possible to restrict the applicant sharing (“buddy”) facility so that only an office manager is able to assign an applicant to a negotiator in the secondary office. When an applicant is registered the secondary office managers are informed by WYWO that a new applicant has been registered.

Invoice Generator

When generating invoices and assigning invoice numbers for fee invoices, the invoice number is now appended to the description of the PLP transaction.

Draft Transactions

When an imported standing order reference is assign to a tenant it is now only assigned to the selected tenancy and not previous tenancies for the same contact.

Works Orders

Added owner contacts to the Contact drop-down field.

Suspense Account

Correct rounding errors in balances.

User Login

If the user only has access to a single company portfolio the “Company” field is now pre-populated.

Quick Lettings Applicant

Corrected terminology – “Required From” field should read “Required By”, because matching works on the basis of only matching applicants with suitable properties that would be available up until the “Required By” date but ignoring properties which might become available after the “Required By” date. The “Required By” field can be left blank, in which case the applicant is matched with all properties regardless of the property “Available From” date.

Added field for “Children”

Added “Company” field and search facility

Payments (PLP)

Added a parameter to enable invoices to be part paid for taxable owners. This should only be used where the Payments (PLP) routine is run once a month to avoid the issue of creating every decreasing payments due to the reduction of the taxable balance.

Transactions – PLI Quick Pay

Added a parameter to disable the ability to “Quick Pay” an invoice.

Quick M/A

Added field for “Owner Type”

Contact Details

The “Email Statement” field is now ticked by default

Transaction Find

Added the ability to search transactions by “Banking Ref” and where Banking Ref is blank.

Property Details

The “Rent” and Rent Frequency” fields are now automatically updated in line with Tenancy Details

Added a new field for “New Home” which is used by Portal Pal to determine which properties are to be classed as “New Home” for Rightmove uploads.

Works Orders – Emailing

Ensure Works Orders are only emailed to the current owner.

Mail Merge (RTF Format)

Corrected an issue where prompts within clauses were not working.

Properties – Photos & Documents

Built in new checks to ensure photos and documents are only uploaded to Portal Pal when changed or new.

Told & Sold

The Told & Sold popup will now not show if all services have already been promoted to the contact.

Statements

Added fields for contact “Title”, “First Name”, “Surname”, “Company”, and “Address Title”.

Mail Merge (RTF), Tenancy Agreements

Correct problem with multiple merging.

Version 1.3.3.5

Transactions – Auto Allocate

Ensure allocated total is filled correctly when clicking Auto Allocate Now.

Payments (PLP)

Ensure Available Balance is calculated correctly for all departments.

Version 1.3.3.4

Statements

Correct Fees Brought Forward being calculated on all PL transactions and not just fees..

Version 1.3.3.3

Statements

Correct Fees Brought Forward being split by property.

Version 1.3.3.2

Tenancy/Deals

Added a parameter to allow the setting of a default tenancy status when new tenancy/deal created.

Tenancy/Deals Grid

Suppress new status of "Fall Through" if used.

Statements

Corrected bug where Fees Brought Forward balance was calculating incorrectly if PLI/PLN had multiple account nominal lines.

Version 1.3.3.1

Office Details

WebID field label showing over Branding field label

Views

Filter string not clearing when changing views

Unknown Receipts, Quick Monies

When processing, stop the form from closing if validation fails

Tasks

Process button not showing

Global Contacts

Correct problem where error shows if no grid loaded.

Contacts

Had to reinstated non-modal form opening in some instances – eg when adding a contact to a tenancy.

Lettings Properties Grid

Ensure right-click option to View Photos is showing

Fees Pending

Store date on entering the grid rather than on processing to avoid a date overlap which could cause fees not to be processed if rent is allocated while a Fees Pending grid has already been calculated.

Properties/Units

Correct a problem when uploading a new property.

Calendar

Correct multiple looping

Negotiator Work Screen

Right-click “Set layout as Personal Default” was not working.

Version 1.3.3.0

New Features

Income & Expenditure Report

Added a new report to produce Income & Expenditure documents for individual owners for tax purposes. This report is available from the Accounts Reports menu.

Global Contact Search

Added a new facility – available from the main “Actions” menu, and also available when searching contacts – to allow contact searching across portfolio companies. This is only valid where multiple companies are stored within the same Veco database.

Manual Transaction Posting

It is now possible to select a batch reference when posting a batch of transactions using the “Save & New” button. This will allow batches to be easily identified and totalled.

Power Grid Mail Merge

Added a new right-click option to enable mail merging letters from the results displayed in the Power Grid. This feature is only available when using mail merge templates designed in RTF format. Future mail merge enhancements may only be available when using RTF format.

Owner Group Account Balances Grid

Added a new “Accounts Reports” grid to show all Owner Group balances in grid format.

Basic Marketing Properties Grids

New “Available Properties” grids, for sales and lettings, have been added to the Marketing menu to show available properties in a format more suitable for internal use.

Additional Functionality

Supplier VAT Rate

Added a supplier field to indicate the default VAT rate selected when entering a supplier invoice. The default VAT rate will be zero. This function would normally be used for Estate expenditure.

PLI/PLN Transactions

Automatically selects the relevant VAT rate for the chosen supplier.

Quick Monies Templates

Automatically selects the relevant VAT rate for the chosen supplier.

Scheduled Charges

Automatically selects the relevant VAT rate for the chosen supplier.

Direct Debits

When generating Charges (SLI) it is now possible to automatically generate draft SLP transactions for any tenants with a Paying-In method of “Direct Debit”.

Told & Sold

Added options to link Told & Sold promotions to Tenancy and Owner Group categories.

Notes Document Viewer

Added a facility to allow documents attached to notes to be previewed.

SMS Messages

Text messages greater than 160 characters can now be sent automatically. The TxtAnywhere service allows 3 messages of 153 characters to be sent. This setting can be controlled via the TxtAnywhere website.

Supplier Remittance Advices

It is now possible to email supplier remittances when running the BACS/Cheques routine.

AutoMate (Upgrade available upon request)

- The processing of reports in AutoMate has been re-engineered to significantly improve performance.

- AutoMate reports can now be attached to emails as either PDF, CSV (Excel), or RTF (Word) documents.

- Added an option to delete PDF attachments after emailing. This will avoid the build up of unused documents.

Views

There is now an option to create prompts based on numeric fields in a grid. Also, when creating a View it is possible to add a Useful Hint to explain what prompts are required.

New Fields / Database Changes

No specific changes

Grid Changes

Draft Transactions

Added Standing Order Reference and Batch Reference columns.

Workflow

- Added Tasks Completed column
- Completed Workflows can now be completed from the Workflow grid
- Added Owner Group column

Tasks

- Added Owner Group column
- Added User Department and User Job Role columns
- Added a filter option for Status

Negotiator Work Screen

Added a right-click option to “Set Grid Layout as Personal Default”.

Properties/Units - Lettings Properties

Added a right-click option to view property photos.

Contacts – Sales Applicants (inc Active Sales Applicants)

Added “Last Contact Date”

Suitable Lettings Applicants

The budget field now reflects the rent period shown.

Property Balances

Added current owner group field.

Tenancy Balances

Added property field.

Improvements / Bug Fixes

Quick Applicant

Added a Notes field

Suitable Applicants

When emailing details of properties to applicants, it is now possible to include the property website fields [Web Link 1] and [Web Link 2]

Statements

Added a [Property Manager] field consisting of Staff Name, Direct Dial phone number, and Email Address

Property Scheduled Charges

When a sub-department is selected the Charge shows “Budget Amount” rather than the total service charge. This was causing confusion.

Calendar and Appointment Grids

“Vacating Date” diary events for periodic tenancies are now suppressed.

Diary Projection

- Added a parameter to allow the diary projection grid to default to either “Event Date” or “Reminder Date”.
- The appointments section can now be customised.

Tenancy Workflow Tasks

Mandatory Tasks with a Target Date later than the tenancy start date are now ignored when checking if all tasks have been completed before allowing a tenancy to become Active. This is to allow some tasks to be completed after a tenancy has already become active.

Workflows

It is now possible for the Target Date to be the current date.

BACS File Generation

Added an option to allow the date in the BACS file to be a format of DD-MMM-YYYY

Owner Group Float

Ensured the float can only be a positive value.

Calendar

“All Day” calendar event can now have a reminder.

Locked (Modal) Forms

The use of “modal” or “locked” main data forms has now been relaxed where appropriate to make it easier to jump from one action to another.

Rent Guarantee

Added a parameter to not enforce a clear down of the Rent Guarantee grid as part of the Period End routine.

Property Dates

When clearing a property Gas Expiry Date or EPC Expiry Date a note now has to be entered giving a reason why the dates are being cleared. This is to close a loophole whereby it was possible to enter a Gas or EPC date just to allow a tenancy to become active, but then clear the date afterwards.

Property Gas Date

Added a parameter “Don’t allow gas expiry to be cleared?” to prevent a gas expiry date being cleared once entered. If clearing the date is allowed the original appointment is not deleted.

In either case, a note reason needs to be entered. This note is added to the original appointment feedback.

Works Orders

The communications grid now only includes details for current contacts (tenants, etc).

SMS Notes

Notes added as a result of sending an SMS now also include the contact mobile number as confirmation of where the SMS was sent.

Tenancies/Deals Notes

Added an option within the Notes grid to show any notes relating to any of the tenants belonging to the tenancy. This is to get a fuller view of the tenancy notes history in chronological order without having to view each tenant contact notes individually.

Owner Group Notes

Added an option within the Notes grid to show any notes relating to any of the owners belonging to the owner group. This is to get a fuller view of the owner group notes history in chronological order without having to view each owner contact notes individually.

Negotiator Work Screen

Bulk emails now include the user signature.

Bulk emails and reports sent to specific chosen applicants are now recorded in the Matching History on the property and applicants.

Negotiator Work Screen (Sales)

Added "Any" as a property type when using the Quick Match facility.

Applicant Form

The "Specific Requirements" field has been changed to an expandable text field to allow more text to be entered.

Properties/Units Form

The "Viewing Arrangements" field has been changed to an expandable text field to allow more text to be entered.

Statements

Corrected the "Total Fees Brought Forward" balance to only pick up Owner department transactions.

Owner Group Grid

The "View All Offices for Region" is now correctly applied to the Owner Group Grid.

Quick M/A Forms

Selecting an existing Owner and Property now allows an appointment to be created. This is so a new M/A can be arranged for an existing property.

Key Management

It is now possible to mark keys as "No Longer Held". A key will appear as such when booking out.

Tenancies/Deals

When a tenancy is marked as active the attached contacts are now archived as Applicants and given an active Tenant status.

Viewings

The count of the number of viewings on property or applicant grids now ignore any marked with a sub-status of "Follow Up".

Sales Progression

- The form that appears to remind the user to change the addresses of owners and purchasers now appears when a sales is set to "Completed" status rather than at "Exchanged" stage.
- When an offer is set to "Exchanged" the property is now unticked as "On the Market".
- If a property Web Status is changed Portal Pal is now updated accordingly.

PDF Reports

Added a parameter to allow PDF reports to be saved compressed, in order to save space and when emailing.

Searching Properties

When adding a property to a tenancy or appointment, etc the search list of properties is now marked as archived if appropriate.

Contacts

When opening a contact the focus is not now automatically set on the “Title” field. This is to avoid the title being inadvertently changed by using the mouse when the contact form is opened.

While You Were Out (WYWO)

WYWO reminders do not now pop-up automatically when using views. This is to prevent the reminder form interrupting any prompts.

Note Documents

Corrected “Document Not Found” error due to not looking in the “Start In” path.