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: 1.3.3.0

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 1.3.3.0

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.