



# KEY-DATA SYSTEMS

PROPERTY MANAGEMENT AND PROPERTY SALES SYSTEMS

## Key-Data Gold Update Schedule November 2015 to Present

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### *Latest updates at the top*

#### **Version 6.3.3.4 completed 16 September 2018**

- **Important New Accounting Feature:** The new 'Reporting/Accounting/Profit & Vat/Composite Revenue To Move (from client to office)' feature allows your agency to report on and automatically clear/reconcile all agency commission transactions. Further, it gives you the ability to automatically transfer the summation of the calculated funds from your Client Account to your Office Account. Previously this had to be done manually using a date range and this new automated mechanism greatly simplifies the management of your agency commission. *Procedures: To calculate the commission due to your agency, go to: 'Reporting/Accounting/Profit & Vat' screen and select the 'Composite Revenue To Move (from client to office)' option. Using the date-picker at the top of the window, select the through-to date that you wish to use, normally this will be today's date, although a prior date may be selected if required. After selecting your output option, click the 'Report' button. A list comprising of the various commission streams is generated with the total displayed at the top of the report. When the report is closed, you are asked whether you would like to mark all reported transactions as moved, and make the transfer from Client Account to Office Account. If you select 'Yes' then the transactions are marked as cleared, and the commission transfer screen appears. **NOTE: The first time you run this routine following the update, you will need to clear out all previous transactions to a selected date, but the commission amount will NOT need to be transferred as you will have done this previously using the manual routine, so just click the 'Close' button at the transfer window.*** For any help with this important feature please do not hesitate to contact a member of the customer support team for assistance and training.
- As all landlord payments need to have been made before the 'Reporting/Accounting/Client Account Breakdown' feature can give an accurate accounting picture, where outstanding landlord payments exist, the user is notified and the routine is blocked.
- The 'Reporting/Accounting/Client Account Breakdown' feature now automatically calculates and displays the 'Less Pending Commission Withdrawals' total using transactions that have not been cleared and reconciled using the above routine, greatly simplifying the breakdown procedure.

#### **Version 6.3.3.3 completed 05 September 2018**

- Where a proposed tenancy start date has been recorded either through the 'Accounts/Tenants/Pre-Payment' routine or directly from the 'Task Management' tab of the 'Tenant Information' screen, this information along with the full tenant name, may now be added to your 'Landlord Management/New Let/References Received' letter template. *Procedure: Add the fields: <TENDATE> and <TENNAME> fields to the letter template through the 'Edit/Letters/Landlord references received' routine.* For assistance with this please do not hesitate to contact a member of the customer support team.

- It is now possible to add energy rating information to the 'Reporting/Property/Complete List (by street name)' report. *Procedure: Add the fields: <EnergyBand>, <EnergyBand2> & <EnergyBand2b> fields to the report template as required through the 'Edit/Reports/Property Reports/Complete by Street Name' routine.* For assistance with this please do not hesitate to contact a member of the customer support team.

#### **Version 6.3.3.2 completed 21 August 2018**

- Service release only no new features

#### **Version 6.3.3.1 completed 07 August 2018**

- **TENANCY DEPOSIT REGULATIONS** Following the regulation change in the time allowed for agencies to move custodial tenancy deposits into custody, the number of days before the Key-Data Gold warning is displayed is now alterable in the 'Admin Tools/System/Preferences/Reminders' screen. Currently the number of days for the warning has been set at 14 days which is the same as previously. This may be altered as required to suit your requirements and current regulations.
- The 'Admin Tools/System/Audit Information' routine now allows for a property Key-Code filter to be applied along with the other previously existing filters.

#### **Version 6.3.3.0 completed 30 July 2018**

- Following further client feedback, the 'Reporting/Accounting/Client Account Breakdown' feature has been further developed to give improved totals and layout.

#### **Version 6.3.2.9 completed 20 July 2018**

- It is now possible to add landlord bank details to tenant letter templates. *Procedure: Add the fields <LLBank> (bank name), <LLAccNam> (account name), <LLBankAc> (bank account number), <LLBankSo> (bank sort code) to your letter templates. Remember to generate the letter at least once after running this update for the new fields to appear in the fields list.* If you would like assistance in adding the new fields to your letter templates please approach a member of the Key-Data Support team.

#### **Version 6.3.2.8 completed 12 July 2018**

- The landlord selection table on the 'Property Management/New Property Registration' screen now displays both landlord names. Previously, due to the fact that the second landlord name was not displayed, where two landlord records existed with the same primary landlord name it was not possible to easily select the correct record without reference to the landlord code.

#### **Version 6.3.2.7 completed 04 July 2018**

- The 'Admin Tools/Sent Items (email)' menu entry has been renamed to 'Sent Items (email & sms)'. NOTE: when this app is run, where required a filter on 'sms message' may be applied to show just sms messages.

#### **Version 6.3.2.6 completed 18 June 2018**

- The latest version of the 'Office Diary' (version: 3.0.1.2) has a new icon which makes it easier to differentiate it from the main Key-Data Gold application when both are minimised on the task-bar.
- The additional status of 'Awaiting Instruction' has been added to the 'Service Call Centre' management screen. This is a nice addition between the status options of 'Job Quotation' and 'In Progress'.
- The 'Letters & Reports/Reporting/General/Historic Deposits & Tenancy Reports' app now allows for the tenancy service type to be filtered on when the 'Tenancies Created (current)' option is selected. Additionally, the resulting report displays the tenancy service type.

#### **Version 6.3.2.5 completed 28 May 2018**

- **GDPR REGULATIONS:** It is now possible to manage the GDPR status of an applicant. Currently, all applicants have been set to have not returned their GDPR forms and you will be notified accordingly. *Procedure: Both the first page of the applicant registration screen, and the main 'Applicant Management' screen now offer a 'GDPR Forms Returned' option box. If when the screen is closed and this option has not been ticked the user is warned before the screen is saved and closed. Additionally, the number of applicants that have not returned their forms is displayed in the 'Reminders Control Panel'. When the 'Missing Applic GDPR Forms' control panel reminder is clicked a screen displaying each applicant is displayed. Double-clicking an applicant record in the table will bring up the applicants record screen.*

#### **Version 6.3.2.4 completed 23 May 2018**

- **GDPR REGULATIONS:** A new feature has been designed to allow you to record whether or not a tenant has completed and returned the necessary GDPR forms to you or not. *Procedure: The 'Tenancy Record' screen offers a 'GDPR Forms Returned' option box on the 'Additional Details (a)' tab. If when the screen is closed and this option has not been ticked the user is warned before the screen is saved and closed. Additionally, the number of tenants that have not returned their forms is displayed in the 'Reminders Control Panel'. When the 'Missing Tenant GDPR Forms' control panel reminder is clicked a screen displaying each tenant is displayed. Double-clicking a tenant record in the table will bring up the tenancy record screen. This reminder may be disabled if required from the 'Tenant tab of the 'Admin Tools/System/Preferences' screen. NOTE: This upgrade has set all your tenants as having not yet returned their GDPR forms. Where it is considered un-necessary by your agency (not recommended) to retrospectively manage this, then the preferences option box may be un-ticked and tenant GDPR regulations managed manually.*
- **GDPR REGULATIONS:** The first page of the 'New Applicant' screen now offers an option to send the applicant an sms message. This is useful so that whilst you are taking initial registration information from the applicant, you can easily send them a text to ask them to confirm that they agree to your GDPR terms.

#### **Version 6.3.2.3 completed 18 May 2018**

- Service release only no new features

#### **Version 6.3.2.2 completed 13 May 2018**

- **IMPORTANT NOTE FOR SMS USERS:** The 'Sms Setup' tab of the 'Mainscreen/Edit/Company Details/Address & Names' screen now contains: 'ID' and 'Password' fields under the 'Provider Account Details' area. Before any further sms messages can be sent, your company will need to record your 'TextAnywhere' account details into these boxes. If you do not know these details then TextAnywhere will be able to tell you what the settings should be (<http://www.textanywhere.net>).

#### **Version 6.3.2.1 completed 11 May 2018**

- It is now possible to have sms message replies sent directly to a users mobile number, as has been recorded on their profile page. This is in addition to the previously existing option where a single company mobile number could be recorded on the 'Company Details' profile screen and messages would go to that mobile number. This is the default following this update, but if you prefer sms message replies to come to your company mobile then please contact a member of the support team who will set this up for you. Additionally, when an sms is sent, the mobile that is to receive any reply is displayed at the foot of the screen
- When a user performs a Rightmove Realtime upload, the lock file that is created (Key\RealtimeLck.txt) now contains the name of the user locking the routine. If someone else tries to start the routine the name of the user locking the routine is reported to them for convenience.

#### **Version 6.3.2.0 completed 30 April 2018**

- When a new applicant comment is posted into the 'Special Requirements & Notes' box, the automatic time/date and user stamp information is posted after the 'Record Comment' button is clicked making the stamp un-editable by users blocked by system security settings.
- Following recent client feedback, the 'Reporting/Accounting/Client Account Breakdown' feature has been further developed to give improved summation totals and layout.

#### **Version 6.3.1.9 completed 18 April 2018**

- The 'Landlord', 'Tenant', 'Contractor' and 'Applicant' screens now offer a new export option under the 'Tools' menu. The 'Export for Telephone System' options will generate an Excel file that may be used to import into your telephone system.

#### **Version 6.3.1.8 completed 10 April 2018**

- Where a property reminder notification is clicked in the Mainscreen, 'Reminders Control Panel', the report that may be generated from the reminders screen now contains the landlords name and contact details.
- The Office Diary (version: 3.0.0.9) now allows for the scheduling of viewings for applicants that are already recorded as proceeding with the purchase of a property. *Procedure: When at the 'New Sales Viewing' screen tick the 'Include Purchasers' option box before selecting the applicant.*

#### **Version 6.3.1.7 completed 02 April 2018**

- A new filter to: 'Show all but Rent Items' has been added to the 'Rents & Collections Due' screen.
- **ACCOUNTING FEATURE:** A new mechanism that allows you to instantly see, and manage collections for all tenants where they have a 'Credit Account' balance allowing them to clear their outstanding balance, has been added to the 'Rents & Collections Due' screen. *Procedure: Tick the 'Show Balances' option below the overdue transaction listing table. The table view now alters to display the various balances for all tenants that have a credit bank balance greater than or equal to the value of all their outstanding items. The tenant collection screen may be initiated by double-clicking a tenant in the display table.*

#### **Version 6.3.1.6 completed 24<sup>th</sup> March 2018**

- **ADDITIONAL REMINDERS FEATURE:** Two additional property licence reminders have been added to support properties with multiple landlords (especially for Scottish agents). Available from the 'Detailed Property Information/Reminders (b)' tab, the 'Property Licencing (b) & (c) options function in exactly the same way as the original single property licencing reminder function sending automatic reminders to the 'Mainscreen/Reminders Control Panel'. Additionally, the edit box that holds the licence code(s) has been enlarged to allow the addition of the landlord name where required for easy reference.
- **ACCOUNTING FEATURE:** The tenant 'Collection Item' feature is a useful way to move funds from a tenant through to a landlord without any agent commission or VAT issues. However, there has previously been no easy way to identify how many 'Collection Item' transactions are due to be paid through to all landlords at a moment in time, without visiting the individual landlord payment routine. This has now been remedied: Once a collection item transaction has been paid by a tenant, a new notification, 'Collection Item Payment Reminder', will appear in your 'Reminders Control Panel'. This notification may be clicked to display all transactions due to landlords. Additionally, double-clicking a transaction will initiate the landlord payment routine.
- Upon registration, the time that an applicant was first registered is now written to their information screen. Additionally, the ability for users to manually alter an applicant's registration date has been removed.
- **ACCOUNTING FEATURE:** The 'Account Management/Client Account/Cash Withdrawal' routine has been further developed. If the 'Transaction is a movement of commission' option box is ticked, the client account memo description is automatically set to 'Commission Transfer' and additional information options appear. It is now possible to record the dates that the commission transfer

covers, and this information appears in the client account list. Additionally, if an 'Office Account' category code is selected then the transaction is automatically now recorded into your Office Account as a credit.

- **ACCOUNTING FEATURE:** An important new routine, currently still undergoing development, has been added to: 'Reporting/Accounting'. The 'Client Account Breakdown' option is the first stage in a series of routines that will allow ARLA registered agents to more easily fulfil their audit requirements. Currently a number of different routines and reports have to be completed manually to achieve this, and this new feature will speed up the process when it has been fully completed. If you would like to discuss the new feature and our plans for its further development then please approach a member of the Key-Data Support team.

#### Version 6.3.1.5 completed 14 March 2018

- **ACCOUNTING FEATURE:** Where landlord and tenant invoices and credit notes are reversed through the 'Admin Tools/Account Maintenance' routine, the current system date is now recorded into the 'PaidDate' field of the transactions.
- **NEW ACCOUNTING REPORT:** The 'Reporting/Accounting/Trade Debtors' report allows your agency to select a single date, and report on company debtors (transactions that were due to be paid to the company) on that date.
- Prior to this version, where a tenant or landlord invoice had been reversed the date on which the transactions had been reversed was not recorded. However, the new 'Trade Debtors' report described above requires the date the transaction was reversed to be set. A new routine has been designed to allow this to be accomplished quickly and easily and only needs to be completed once. *Procedure: Select: 'Admin Tools/Account Maintenance/Reverse Tenant Invoice. Now select the 'Tools' menu and 'Set a Reverse Date For Previous Transactions'. Select a transaction, then select a date in the calendar before clicking the 'Set Dates' button. NOTE: To multi-select transactions either Ctrl & click each transaction, or hold down Shift & up or down arrow keys. For assistance with this please do not hesitate to contact a member of the customer support team.*
- Where a DSS tenant has an outstanding DSS balance or has unreconciled benefit payment transactions, it is no longer possible to alter their DSS status and their DSS accounts must be closed down first.

#### Version 6.3.1.4 completed 04 March 2018

- **MOOD FEATURE:** The original 'Preferences/Look & Feel' option that allowed a system wide theme to be applied to Key-Data Gold has been replaced with an individual user 'mood' setting. The default mood has been set to 'Luna' but individual users can alter this as required using the new 'Current Mood' selector on the 'Mainscreen'. To activate this, click the 'Current Mood' label and then make a selection from the list of available moods. Once a mood has been selected and displayed to the user, they can either revert to their previous mood, or save the mood to be used in future.
- The 'Service Charge Commission' calculator buttons on the 'Detailed Property Information' screen have been removed. The calculations are now done automatically when you leave the edit boxes. The easiest way to achieve the calculation after recording the amount is to push your TAB key. Alternatively you can click into another area of the screen.

#### Version 6.3.1.3 completed 27 February 2018

- **ENHANCED GENERAL DATA PROTECTION REGULATION (GDPR) FEATURE:** In line with current GDPR requirements, it is now possible to allow/disallow users access to viewing bank account details contained in the Key-Data Gold system. *Procedure: Go to: 'Mainscreen/Edit/Users' and record a tick or untick as appropriate for each user, the 'Show Bank Details option. In addition to hiding bank details on the: 'Landlord Information', 'Tenant Information', 'Contractor Information' 'Detailed Property Information' and 'Mainscreen/Edit/Company Details/Address and Names' screens, all routines, reports and letters that include bank account information are restricted.*

*These include: 'Admin Tools/Prepare Payment List', 'Reporting/Property/Property File Let List', 'Reporting/General/BACS Payment Landlord List', 'Tenant Management/Detailed Tenancy Record/Letters/Standing Order Mandate', 'Tenant Management/Detailed Tenancy Record/Letters/References/Financial'.*

- The 'Tenant Management' screen now offers a 'Find Tenant by Forename' option to complement the existing search options.

#### **Version 6.3.1.2 completed 23 February 2018**

- **RESIZABLE OFFICE DIARY:** The current Office Diary (version 3.0.0.8) is now resizable to suit a user's individual preferences. The Office Diary will re-open at the same size that the user last closed it.

#### **Version 6.3.1.1 completed 13 February 2018**

- Where your 'Admin Tools/System/Preferences/General/New Service Calls' are set to automatically add the time and date to new 'Service Call' transactions, the user that recorded the event is now also included in the stamp.
- **RESIZABLE KEY-DATA GOLD:** Over the last few years device screen resolution has increased massively which has meant that Key-Data Gold has grown smaller and smaller! To address this issue, it is now possible to resize your Key-Data Gold system either by dragging the main-desktop window out, or maximising it to entirely fill the screen. All screens and window items will increase in size accordingly. This makes the system easier to read and work with. Additionally, each user can have their own system size, and whatever size has been selected when the system closes will be the size the system re-opens at.

#### **Version 6.3.1.0 completed 23 January 2018**

- A new EPC report has been added to the 'Reporting/Property' report bank. The additional 'EPC Reporting' option will report on all active properties (un-let properties may be included or dropped from the report as required), to display their EPC rating information. The report is ordered on the efficiency rating which means that all properties where EPC information needs to be recorded are at the top of the report. This also makes it very easy to identify which properties are below a certain efficiency band. Where necessary, the report may be exported to Excel.
- All 'Arrears Reports' now offer an option to include 'Benefit Item' transactions. The default is not to include them, but an option box now exists to alter this where desired.
- The email signature box on the 'Edit/User Details' screen has been enlarged to display more of the signature text, and also now benefits from the addition of scroll bars.
- The 'Contractor Management/Tools/Trade Lists' screen now offers print options. The 'Print' buttons at the foot of the 'Main-Trade' and 'Additional-Trade' lists will generate a list of matching contractors displaying their main-trade and any additional-trades.
- A new mechanism has been designed and implemented to allow for the management and reporting of partial-vat claims such as in the case of a company vehicle lease. *Procedure:*
  - a) Set up the contractor/supplier, or if they exist already go to their contractor record screen.*
  - b) Into the new 'Report Reduction' box record the vat percentage claim back that is allowable.*
  - c) Where transactions exist for this contractor in the selected period when either the 'Profit & VAT/VAT Paid To Suppliers' or 'Profit & VAT/Composite VAT Summary' reports are generated, their transactions are itemised and the allowable vat element is displayed. Also the summation of the amount that the total vat claim should be reduced by is given. Additionally, when the reports are generated the user is notified by a system message.*
- **KEY-MANAGEMENT MODULE DEVELOPMENT:** It is now possible to record how many key-sets your agency holds for a property: Go to the 'Additional(b)' tab of the 'Detailed Property Information' screen. As you log these keys out using the pre-existing 'Key-Management' module the number of keys held, along with how many are currently logged out and the number of remaining key-sets is displayed on the 'Move Key Out' screen. This screen also now allows the

property address to be clicked to give fast access to the property information screen. NOTE: To give user-flexibility no block is placed on logging out more key-sets than you hold, although a system message is delivered to the user to highlight the fact.

### Version 6.3.0.9 completed 22 November 2017

- Where a contractor transaction was linked to a 'Service Call' transaction, the 'Service Call Ref' is now displayed on the 'Contractor/Tools/Display Accounts' screen. Additionally this field may also be added to the contractor transaction reports and export facility. *Procedure: Select 'Mainscreen/Edit/Reports/Supplier Items/Transaction History' and add a DbText item to the report template linked to the 'CallRef' field of the 'ServiceCall' data pipeline.* For assistance with adding this field to your report template, please ask a member of the Key-Data support team.
- Where a 'Property Inspection Due' event is double-clicked in the 'Maintenance Scheduler' and the letter is emailed, the email subject now reflects what has been recorded in the 'Property Inspection default email subject' area of the system preferences.
- A tenants email address may now be added to the 'Reporting/Property/Inspections (between dates)' report. *Procedure: Select: 'Mainscreen/Edit/Reports/Property Reports/Inspections (between dates)' option. Now add the field: 'email' from the 'DbPipeline2' data pipeline to your report template.* For assistance with adding this field to your report template, please ask a member of the Key-Data support team.
- **GREAT NEW SERVICE CALL MANAGEMENT FEATURE:** It is now possible for you to easily manage contractor jobs related to Service Call Management transactions. The time and date that the contractor will be attending the property can now be recorded and monitored and additionally a filter can be applied to display what jobs are taking place in any selected date range. Additionally the contractor appointment can be automatically added to your Key-Data Office Diary.  
*Procedures:*
  - a) Right-click a service call transaction and select the 'Manage Job Date' option.
  - b) Record a date, and a time if required, for the job and click the 'Enter Job Date' button.
  - c) The service call management screen displays this information to the right of the contractor assignment buttons at the top of the screen.
  - d) If the 'Record into Office Diary' option is selected then a start and end time is mandatory, and the item will appear in the office diary with the prefix: 'Contractor Job Booking'. Note: job bookings arranged from the service call centre may not be managed from the diary and all job-notes should be recorded, and the job re-scheduled from the service call management screen.
  - e) To view, and report upon which jobs are being carried out during a certain period, use the filter calendars at the foot of the service call management screen to set a date range. When applied, this new filter will work in conjunction with the existing filters to give a great deal of reporting flexibility.
- The current version of the Office Diary (version 3.0.0.7), displays, but does not allow the editing, moving or resizing of 'Contractor Job Booking' events as described above. If the user attempts any of these functions, they are notified that such events are managed from the KDG Service Call Centre.
- When the 'Letters & Reports/Produce Tenancy Agreement' routine is started the default tenancy agreement is again set to 'Tenancy Agreement 1'. A previous update had omitted to do this.
- It is now possible to mark that a property is in a 'Rent Pressure Zone' (RPZ). This is in preparation for Scottish Law alteration where such properties have to be highlighted on Tenancy Agreement documentation. *Procedure: When registering a new property enter a tick into the RPZ option box. Existing properties may be managed from the 'Edit Address' screen'. Currently all properties have been set as being not in a RPZ.*

- In line with Scottish law alteration regarding Tenancy Agreements it is now possible to add several further data fields to your agreement templates where this is necessary. In your Key folder is a Word document called 'Additional Tenancy Agreement merge fields' and this document explains the new data fields and gives the coding that you can copy/paste to add the fields to your tenancy agreement templates. *Note: Before adding the new fields to your template, please ensure that you generate the tenancy agreement documentation.* For assistance with adding this field to your report template, please ask a member of the Key-Data support.

### **Version 6.3.0.8 completed 19 October 2017**

- The 'Manage Fire Safety' area of the 'Detailed Property Information' screen now offers a free text box that allows for the recording of a fire alarm code where this is appropriate.
- Where Property Reminders are given at system start-up time, as well as the actual reminder being displayed, the reminder screen now also displays the appropriate tab on the 'Detailed Property Information' screen to manage the reminder. This saves the user having to hunt down the correct tab. ie:

*HMO Fire Alarm: Available from Maintenance tab*

*HMO Fire Equipment: Available from Maintenance tab*

*HMO Fire Lighting: Available from Maintenance tab*

*HMO Licence: Available from Maintenance tab*

*Rent Protection: Available from Reminders tab*

*Chimney Sweeping Reminders: Available from Reminders tab*

*CO Check Reminders: Available from Reminders tab*

*Smoke Check Reminders: Available from Reminders tab*

*Property Licencing: Available from Reminders (b) tab*

*Emergency Property Cover: Available from Reminders tab*

*Legionella Check Reminders: Available from Reminders tab*

*EPC Reminders: Available from Maintenance tab*

### **Version 6.3.0.7 completed 02 October 2017**

- An additional accounting report tool has been added to your Key-Data Gold system. The 'Admin Tools/Integrated Revenue Report' allows you to generate a date sensitive list of income revenue transactions into one single report. Additionally this transaction list can be exported in a spreadsheet format for further analysis where required. The report template may be fully edited from the: 'Mainscreen/Edit/Reports/Accounting Reports/Integrated Revenue' option.

### **Version 6.3.0.6 completed 22 September 2017**

- The pop-up message box requesting users to record contractor payment details when the option 'Has this contractor invoice been paid' option is set to yes on various account entry screen has been removed as it was considered unnecessary feedback that slowed user-entry down.
- When a user generates the 'Reporting/Accounting/Profit and Vat/Composite Revenue Report', it is now possible for them to automatically generate supporting break-down reports. *Procedure: Tick the 'Generate Supporting Reports' option box adjacent to the report button.*
- A new preference setting has been added that allows for the default ordering of due landlord payments. The current default is 'Date Collected' as previously. To alter this go to: 'Admin Tools/System/Preferences' and alter the 'Payments Due' option box.
- The current version of the Office Diary (version 3.0.0.6), now offers a faster way of recording viewing times. *Procedure: When a time slot, or multiple-time slots have been selected in the day scheduler, if the selected area is right-clicked, the user can now select 'New Lettings Viewing' or 'New Sales Viewing' and the new-viewing screen will be presented with the selected start and end times automatically recorded.*



### Version 6.3.0.5 completed 07 September 2017

- Where the 'Do Not Allow Landlords In Arrears (reserve account)' preference setting has been set, if a user attempts to record a landlord receipt through either the 'Accounting/Landlords/Record Receipt' or the 'Accounting/Landlords/Record Batch Receipt' mechanisms using the payment method of 'Reserve Account' and the transaction will lead to a negative reserve fund the routine is now blocked.
- The work in progress notes for 'Service Call' transactions now allows for text formatting, similar to a word processor app, to be applied for effective highlighting of important notes. *Procedure: Select the text, or paragraph to be formatted and applied colour, bold, italic, underline, bullet point, different font style or paragraph alignment formatting as required. NOTE: For the new text formatting codes to display correctly on your 'History List' reports then your report template may require editing. Procedure: Select: 'Edit/Reports/Property Reports/History List' and replace the existing DBMemo item containing the 'Progress' field with a DbRichText item. If you would like this to be done for you, then please contact Key-Data customer support who will be happy to do it.*
- When a tenant collection is made, if the transaction being received is the initial rent for a new tenancy, a label alerting the user of this is now displayed directly above the 'Record Payment' button.
- The current version of the Office Diary (version 3.0.0.6), now offers a faster way of recording viewing times. *Procedure: When a time slot, or multiple-time slots have been selected in the day scheduler, if the selected area is right-clicked, the user can now select 'New Lettings Viewing' or 'New Sales Viewing' and the new-viewing screen will be presented with the selected start and end times automatically recorded.*

### Version 6.3.0.4 completed 01 September 2017

- The 'Reporting/Accounting/Historical Accounts' report can now be printed and exported in spreadsheet format.
- The 'Reporting/Accounting/Security Deposit Held report can now be exported in spreadsheet format.

### Version 6.3.0.3 completed 28th AUGUST 2017

- **A new 'Rent Review' reporting and management mechanism has been developed.** *Procedure: Go to 'Letters & Reports/Reporting/Property/Rent Reviews'. All current properties are listed by default. Where a rent review has been set on the properties 'Reminders' tab the property is highlighted in green and these properties are grouped at the top of the list. To manage each properties rent review status and the next scheduled review reminder date, double-click in the list and the 'Reminders' tab will be displayed for editing. A properties let status is displayed and where appropriate the tenancy end date is also displayed. Various list-view options may be set to toggle between all properties, all let properties or all un-let properties.*
- **A new important, historical accounting report has been added to your Key-Data Gold system.** As accounting regulations on letting agents continue to increase, the ability for you to be able to report on money due to landlords at any past date has become an ever more important requirement. This has previously been possible by regularly following Key-Data Gold month end routines. However, to supplement these existing routines which are still good practise to perform, you can now go to the: 'Reporting/Accounting/Historical Accounts' routine, select a previous date using the calendar and obtain the balance of landlord payments due on that date, along with the breakdown of what comprises the balance.
- **An additional preference setting has been added to allow for the separate management of landlord client account arrears, and landlord reserve account arrears blocks.** Previously the setting: 'Do Not Allow Landlords in Arrears' handled both scenarios. This has been renamed to: 'Do Not Allow Landlords In Arrears (client account)' and the new setting is: 'Do Not Allow Landlords In Arrears (reserve account)'. The default setting for the new preference is to block negative landlord reserve account transactions.

### **Version 6.3.0.2 completed 02 August 2017**

- The Service Call Centre, work in progress screen now displays the service call number for easy reference.
- The Service Call Centre screen now allows fast access to the properties 'History List' via the new icon in the top button bank.
- The 'Reporting/Accounting/Landlord Reserve Account Report' may now be generated to an Excel file format using the new option box.
- Where the 'Do Not Allow Landlords In Arrears' option has been selected from the 'Admin tools/System/Preferences/Accounts' screen then it is no longer possible for a user to record a manual reserve account transaction that will take the reserve account into arrears.

### **Version 6.3.0.1 completed 22 June 2017**

- Service release only no new features

### **Version 6.3.0.0 completed 19 June 2017**

- **Additional User Security:** Where the 'No Comment Editing' option has been ticked on the 'Mainscreen/Edit/User Details' screen to stop comment editing by the user, the 'Special Requirements and Notes' memo box on the 'Applicant Management' screen now becomes read only to prevent free editing. The user may still record new applicant notes by clicking the 'New Note' button at the foot of the comments memo box.

### **Version 6.2.9.9 completed 07 June 2017**

- Service release only no new features

### **Version 6.2.9.8 completed 27 May 2017**

- Any notes that were recorded when a tenant was an applicant, are now automatically sent to the 'Notes' field in the new tenant record. Previously this information had to be looked up from the: ' Contractor & Contact Management/Tools/Show/Old Applicant Information' screen.

### **Version 6.2.9.7 completed 15 May 2017**

- Where system preferences are set to not allow landlords to be sent into arrears, and a reserve account transfer has been set for a landlord that will take the reserve account into arrears (ie; a negative transfer amount), then the landlord payment routine will now not continue and the user is notified.
- The 'Tenant Credit Account' may not now be sent into arrears by default. Where it is deemed necessary or useful for your agency to be able to allow a tenants credit account to be in an arrears situation, then the preference setting: 'Accounts/Tenant Accounting/Do Not Allow Credit Bank Arrears' may be unticked. Note: This will then be using funds from another account which is slowly but surely being frowned upon/stopped by increasing lettings and management legislation.

### **Version 6.2.9.6 completed 08 May 2017**

- The 'Occupancy & Rent Report' and the 'HMO 'Occupancy & Rent Report' that are available from the 'Reporting/Landlords' screen now order the 'Rent Collected' and 'Commission Breakdown' sub-reports on the date that the transaction was collected. Previously the order was random.

### **Version 6.2.9.5 completed 26 April 2017**

- **Ease of Use Improvement:** A 'Property Folder' shortcut button has been added to the main Detailed Property Information screen. This now gives ease of access to this important area when the DPI screen has been accessed from a place other than the Property Information screen, such as the Landlord Record screen.

- **Ease of Use Improvement:** The 'Letters & Reports/Reporting/Applicants' routines are now available directly from the 'Tools/Reporting' menu of the 'Applicant Management' screen.
- Where a secondary landlord name has been recorded on the 'Landlord Record' screen, all 'Landlord Ledger' reports and 'Occupancy & Rent' reports now display this.

#### **Version 6.2.9.4 completed 21 March 2017**

- **Maintenance Event Re-Scheduling Improvement:** Where maintenance events of the type: 'Property Inspection Due', 'Letter Of Tenancy Renewal', 'Rent Review Due', 'Maintenance Fee Due' or 'Ground Rent Due' are closed and re-scheduled from the 'Maintenance Scheduler' then the 'Detailed Property Information' landing page has been set to the 'Reminders' tab for easy editing. Other events will land at the 'Maintenance' tab.
- The 'Mainscreen/Reminders Control Panel' now has its contents ordered alphabetically from A-Z.
- **New Landlord Payment Scheduling Routine :** It is now possible to define automatic system-reminders of when to make your landlord payments. This ensures that landlords can receive their payments at the same time each month, as many expect to do. The 'Bank & Payment Details' area of the 'Detailed Landlord Record' sheet, now offers a 'Pay Reminder' calendar and a 'Frequency' selector. This allows the user to select a next reminder date and a processing frequency for further automatic reminders. When the reminder date is hit, then a reminder: 'Landlord Payment Reminders' appears in the 'Mainscreen/Reminders Control Panel'. When this reminder notification is clicked a management screen is displayed which allows the landlord(s) to be double-clicked to initiate their payment routine. When the payment has been made the user is asked whether they would like to update the next payment reminder. If 'Yes' is selected, then the next reminder is set using the selected frequency.
- It is now possible to add the agency user that has been assigned to a service-call transaction to your contractor job-sheets. This gives the job-sheet recipient a direct point of contact to improve job communication. *Procedure: Select: 'Edit/Reports/Supplier Items/Supplier Job-Sheet' to open the template editor. Drop a new label on the form (this will need to be label30) and position it as required. Save the edits and when the job-sheet is next generated the assigned user will appear.*
- The Reporting/Accounting/Un-reconciled Landlord Accounts (all)' report may now be exported to an Excel format file.
- The Reporting/Accounting/Un-reconciled Landlord Accounts (all)' report may now be edited by the user where required. *Procedure: Select the 'Edit/Reports/Accounting Reports/Unleared Client Account (all)' option.*

#### **Version 6.2.9.3 completed 16 March 2017**

- **New Accounting Shortcuts:** The 'Detailed Landlord Record' sheet now offers a new 'Accounts' menu that gives shortcuts to all landlord accounting routines. Previously, many of these important routines could only be launched from the 'Mainscreen/Accounting/Landlords' menu.
- When the 'Property History List' report is generated it is now possible to hide the event management notes that were maintained during the life of the event. *Procedure: Before clicking the print option, tick the 'Hide Notes' option.*
- **Improved Applicant Management:** A new mechanism to help you to grade applicants on a scale of 1 (best chance of becoming a tenant) through to 10 (least chance of becoming a tenant) has been designed: This 'Let Ability' of an applicant is the likelihood of the applicant becoming a tenant. *Procedure: The 'Match Requirements' tab of the 'Applicant Management' screen and the 'New Applicant' screens offer a 'Let Ability' drop down box, NOTE: New applicants 'Let Ability' defaults to 5 and may be adjusted up or down as required. Additionally, when the 'Letters & Reports/Reporting/Applicants/Applicants Registered Between Dates' routine is run, the results may now be ordered by registration date (as previously) or 'Let Ability'. The 'Let Ability' option orders the results with the most likely applicants at the top for easy identification.*
- **New Control Panel Reminder:** The 'Smoke & CO Alarms Reminder' on the 'Reminders' tab of the 'Detailed Property Information' screen has been split into two separate alarms as client

feedback has told us that separate dates should be available for smoke alarms and CO alarms. Where your agency had already set a reminder for this previously single event, a new reminder has been set for the smoke alarm for the same date. ie if you had previously set a reminder for a 'Smoke & CO Alarm' check of 3rd May 2017, you will now have two reminders for this day, one for the smoke alarm and one for the CO alarm. These may be altered for each alarm as required.

### **Version 6.2.9.2 completed 06 March 2017**

- It is now possible to assign the contractor(s) that handle portable appliance and wiring checks for properties. Previously users could make a note in a text box of the contractor, but now the contractor may be selected from your contractor/supplier list. *Procedure: Go to the 'Maintenance' tab of the 'Detailed Property Information' screen. Use the drop-down selector box under the 'Electrical Safety' area to assign the contractor(s) for each option. Once assigned, clicking the contractors name will give instant access to their record sheet.*
- It is now possible to apply contractor filters when generating: 'Reporting/Property Reports/Electrical & Fire Checks To Be Arranged' reports. This allows reports to be easily generated and emailed to a specific contractor.
- As regulations continues to tighten up it is becoming more and more important for agencies to be able to prove their trading terms, and their clients agreement to them. To help you manage this, a new mechanism has been developed to help you keep track of whether a landlord has agreed to your 'Terms of Business' (TOB) or not. *Procedure: The 'Landlord Record' screen offers a 'TOB Returned' option box on both the 'Account & Contact Details' tab, and the 'Additional Details' tab. If when the screen is closed the landlord is marked as a client and this option is not ticked the user is warned before the screen is saved and closed. Additionally, the number of clients that have not agreed to your TOB's is displayed in the 'Reminders Control Panel'. When the 'Missing Landlord TOB Returns' control panel reminder is clicked a screen displaying each landlord is displayed. Double-clicking a landlord record in the table will bring up the landlord record screen. This reminder may be disabled if required from the 'Landlord' tab of the 'Admin Tools/System/Preferences' screen. NOTE: This upgrade has set all your landlords as having agreed to your TOB, where it is considered necessary to retrospectively manage this, then the tick box should be un-ticked and managed accordingly.*

### **Version 6.2.9.1 completed 17 February 2017**

- It is now possible to give your various Tenancy Agreement documents friendly names. Previously the eight different agreements were named in the drop down selection box as: 'Tenancy Agreement 1', 'Tenancy Agreement 2', 'Tenancy Agreement 3' etc. Now you can name them in a more appropriate manner that suits your agency-needs and users. *Procedure: Go to the 'Communication Names' tab of: 'Admin Tools/System Preferences' and in the 'Menu Name' box, record the desired name for each agreement.*
- Once a contractor/supplier has been created it is now necessary to unlock the 'Company Name' field before further name alterations can be made. *Procedure: Click the 'Unlock Company Name For Editing' button to the right of the 'Company Name' field and confirm your wish.*
- Where required, it is now possible to enable Key-Data Gold to be able to process automatic, negative landlord reserve account transactions. This allows you to record a negative amount in the 'Transfer Amount' on the 'Detailed Landlord Information' screen and then when the landlord is paid, then the negative amount is effectively refunded back to the landlord from their reserve account. *Procedure: Go to: 'Accounts' tab of 'Admin Tools/System Preferences' and enter a tick into the 'Enable Negative Reserve Transfers' in the 'Landlord Accounting' area.*

### **Version 6.2.9.0 completed 09 February 2017**

- A new routine has been developed to allow the batch receipt of several out-standing landlord transactions. Usually, property charges/repairs/landlord invoices are dealt with automatically when

a landlord statement is generated, and to compliment this and allow for occasions where the landlord supplied an additional payment to cover an outstanding item, this was covered by the 'Accounts/Landlord/Record Receipt' routine. To increase flexibility, and improve general accounting, the new routine now allows for several outstanding landlord items to be reconciled against a single landlord payment. *Procedure: Select: 'Account Management/Landlord Accounting/Record Batch Receipt'. Select the landlord to view all outstanding transactions. Double-click each transaction in the display tables to add to the batch receipt before clicking the 'Record Receipt' button. The default account to post the bank transaction to ('Client Account' or the 'Office Account') will depend upon your accounting preference settings (these being: 'Receive Agency Collections Into The Office Account' and 'Make Contractor Payments From Office Account'). The default bank account may be altered where required, but where transactions exist in the batch that do not match the selected bank account, and may require a journal transfer, a notice is given to the user. Where the 'Office Account' is selected the user needs to select a nominal account to post the bank transaction to. This defaults to nominal account 5000: 'Client Account Supplier Payments'. Receipts may be generated and easily emailed to the landlord. The receipt template may be edited where required from: "Edit/Reports/Landlord Items/Batch Transaction Receipt".*

- When the 'Admin Tools/Import/Bank Payment File' routine is run and the user elects to assign a transaction to a 'Landlord Receipt', if the value of the bank file transaction is not equal to the selected landlord transaction the 'Batch Landlord Receipt' routine is now automatically started. Additionally, a check is done to ensure that the value of the batched transactions is equal to the bank transaction file and if not the routine is blocked.
- 'Rent paid in Advance' has been added as a selectable option to the drop-down 'Description' box on the 'Tenant Credit Account' new entry screen.
- It is now possible to record property 'Key-In' and 'Key-Out' events directly from the 'Service Call Management Centre'. *Procedure: When a transaction is right-clicked in the table select the appropriate option from the 'Log Key Movement' menu.*
- The 'Main Trade' drop-down selection box on the 'contractor Management' screen now lists the trades in alphabetical order.

### **Version 6.2.8.9 completed 03 February 2017**

- Once a property has been created, to alter the defined number of bedrooms that the property has, it is now necessary to unlock the 'Beds' field on the 'Detailed Property Information' screen. *Procedure: Click the 'Unlock' button to the right of the 'Beds' field and confirm your wish.*

### **Version 6.2.8.8 completed 27 January 2017**

- Where the 'Additional Tenants' search mechanism is used during the accounts file import process, the details of the account file transaction are now automatically pulled through into the relevant fields.
- The 'Admin Tools/Import/Bank Payment File' routine now supports the settlement of landlord arrears.
- When a 'Maintenance Event' is marked as completed and the user selects to re-schedule the event the 'Detailed Property Information' screen is automatically opened to the 'Maintenance' tab.
- It is now possible to automatically move 'Electrical Appliance Check Due', 'Electrical Wiring Check Due', 'Energy Certificate' and 'Fire Safety Check Due' notifications from the 'Time Management/Maintenance Scheduler' to the 'Service Call Centre'. Previously this was only available for 'Property Gas Check' events. This greatly speeds up and simplifies the management of the event, as previously it was necessary to manage 2 separate events in the 'Scheduler' and an event in the 'Service Call Centre'. Whilst the previous procedure

that your agency has followed will still function in the same way, it may be advantageous to try the following improved procedure:

- a) The notification appears in the scheduler.
- b) Double-click the event to open the management screen. Write/email the tenants as previously where necessary, and record this in the 'Event Progress Notes' box.
- c) Click the 'Move to Service call Centre' link below the management buttons and confirm your wish.
- d) Use the Service Call Centre to further manage this event to completion. When complete, click the 'Complete & Re-schedule Event' link to re-schedule the next event and generate a property charge if necessary.
- e) The item is removed from the 'Service Call Centre' and automatically recorded in the 'Property History List' for future reference.

- The 'Reporting/Property/EPC's Due (Between Dates)' report may now be exported to Excel where required. Additionally the EPC ratings and reference are included on the report. The report may also now be user-edited from the: 'Edit/Reports/Property Reports/EPC's Due' menu entry.

#### **Version 6.2.8.7 completed 19 January 2017**

- Service release only no new features

#### **Version 6.2.8.6 completed 14 January 2017**

- **Custom Tenant & Landlord Letters: It is now possible to add unlimited agent defined tenant & landlord letter templates to your Key-Data Gold system.** If you have ever wished that you could create your own letter templates for automatic mail-merge and emailing then this feature will make you smile. *Procedure: Select 'Letters & Reports/Letters To Tenants/Custom Letters' or 'Letters & Reports/Letters To Landlords/Custom Letters'. Initially, you will see one template called: 'Custom Template.doc' in the available documents list. Double-click this document to open MS Word and start editing. Add your custom text to the template and when complete, select 'Save As' to create your own document template. Now close Word and you will see your new document in the list. To send it, firstly select it in the document list, and now select the tenant or landlord to generate the document to before clicking the 'Generate Communication' button.*
- **Bank File Import:** The 'Admin Tools/Import/Bank Payment File' routine has been further developed to improve the user-experience further. When the routine is selected, the user is now asked whether they would like to process their native bank file (ie the one that was downloaded from their online banking routine). If they select yes, then an automatic-online conversion mechanism is initiated where the user locates their downloaded file, and clicks the 'Convert' button. The native file is then converted to the correct format for Key-Data Gold to be able to process it. The user can then drag the file to the location they desire (we would suggest the Key:\AccountFiles' folder). When the browser window has been closed, the user can now scroll to where they copied the processed file to. The import process now continues as previously. *NOTE: The automatic conversion routine currently supports NATWEST bank files only. If you use another bank and would like the conversion to work for this bank-file also then please notify a member of Key-Data Support team and supply us with a copy of their native bank file.*

#### **Version 6.2.8.5 completed 07 January 2017**

- A new on-line applicant registration and viewing appointment booking system has been developed to compliment your Key-Data system and in particular your Office Diary. This new system allows

applicants to register on-line and for you to publish your property viewings diary online (basic time booked details only are displayed), so that registered applicants can view available time slots and request bookings. The online system also allows your agency to either accept or reject the applicant viewing request, with the applicant being notified accordingly. It is anticipated that Key-Data clients will add the URLs for this new system to their web-site. This service has been bundled in with the Key-Data Marketing module so if your agency already has this product, then it is good to go with the new online booking feature. The Key-Data Marketing which also includes unlimited portal uploading and property alerts, costs just £15.00 PCM. *Procedures:*

a) **Applicant Registrations:** Applicants will initially need to create an account from: <http://www.key-datasupport.co.uk/clientdiary/web/login/index>

b) **Publish Your Viewings Diary:** From your Key-Data Gold desktop, select 'User Tools/Publish Viewings Online'. This will immediately publish all your future viewings for the next 30 days to: <http://www.key-datasupport.co.uk/clientdiary/web/login/index>.

c) **Applicant Viewing Requests:** Once logged in, the applicants can click an available date/time slot and complete the resulting form request. When they do this your agency is sent a viewing request notification email, and the request awaits your acceptance or rejection.

d) **Viewing Request Management:** Once a viewing request has been logged by an applicant, your agency may Accept or Reject the request from: <http://www.key-datasupport.co.uk/clientdiary/web/diary/view-appointment>, and the applicant is notified via email accordingly. If the viewing request was accepted, then your agency will record the viewing in the Office Diary and re-publish the diary. **NOTE:** This can be done a number of times during the day or just once a day.

- The 'Reporting/Property/EPCs To Be Arranged' report now allows a date filter to be applied. This allows for a report to be generated on all properties with EPC's becoming due at any selected time in the future (or in the past). This is great for the early management of EPC's.
- Where a bank payment file is imported and the 'Landlord Receipt' option is selected, if the payment file transaction value does not match the selected landlord transaction amount the routine is blocked.
- The 'Time Management/Viewing Book/Tools/Print' app now displays the number of viewings in the report at the top of the page.

#### **Version 6.2.8.4 completed 02 January 2017**

- A new app has been added to the 'Admin Tools/Manage Account Items' menu. The 'Tenant Credit Account Transfer' option allows for easy journal transfers to be made between one tenant credit account and another. Previously, to move funds from one tenant credit account to another a manual debit and manual credit had to be made to each account. One use of this new facility would be to correct a tenant credit account where a credit had been made to the incorrect account. Another use would be where one tenant credit account is used to hold unknown tenant funds as a suspense account (a holding account), until such a time as the actual tenant has been identified. *Note: This routine simply transfers funds from one tenant credit account to another, no entry is made in any other account.*
- A new bank-file import routine has been developed that will speed up the batch receipt of account transactions and reduce the possibility of user-entry errors. *Procedures:*
  - a) Add/create the file 'Key\AccountFiles\paymentimportfile.csv'; see below for the required format of the file.
  - b) Run the 'Admin Tools/Import/Bank Payment File' routine and click the 'Import File' button to import the .csv file into your Key-Data Gold system. note: if the file does not adhere to the required structure, or a transaction in the file is missing information, then an error is given and the routine is abandoned with no imports made.

c) When the import has completed successfully, then for each transaction in the bank-file, select whether to assign it to your 'Tenant Credit Account', 'Landlord Reserve Account' accounts, or as a 'Landlord Receipt', and then click the 'Process This Transaction' option. When the appropriate screen appears and the correct tenant or landlord has been selected, the values of the imported transaction are automatically set and the transaction may be quickly completed as usual.

NOTE: The file should contain one line for each transaction and conform to the following structure:

*transaction-date,narrative1,narrative2,payment-method,payment-amount. for example the following contains 4 transactions:*

*01/12/2016,SMITH,RT-16TENN,BAC,1538.33*

*01/12/2016,JONES J R,RT41BROCKWELL,BAC,1400*

*01/12/2016,GREEN C A,HD15MORRIS,BAC,600*

*01/12/2016,JOHNS,RT-20SECKER,BAC,1100*

- **The Key-Data Office Diary (from version 3.0.0.4) will only now generate appointment and viewings reminder notifications for the currently logged in/individual user.**

Previously, all reminder notifications were sent to all users leading to the possibility that one user could switch off further notifications for another user. If your agency would like to revert to the original behaviour then in Key-Data Gold, go to the 'Reminders' tab of 'Admin Tools/System/Preferences' and in the 'Office Diary Reminder Notifications' area record a tick into the 'Notify All users' option box.

### **Version 6.2.8.3 completed 08 December 2016**

- A new app has been added to the 'Admin Tools/ Account Maintenance' screen. The 'Re-assign Service Calls' option allows for three routines that will assist in a) moving Service Calls from one ex-negotiator to another (perhaps before the user is deleted) and b) Removing or altering previous assignments where the negotiator had already been deleted. Once committed the re-assignments are not reversible.
- The 'Additional Details' tab of the 'Landlord Details' screen now offers a new field to record a landlords 'Licence Number'. The information recorded here is automatically displayed on the 'Reporting/Landlords/Complete List With Properties' report. If you would additionally like it added to the individual landlord with properties report that is available from the 'Tools' menu of the landlord record sheet, then go to: 'Mainform/Edit/Reports/Landlord Items/Property Report' and add the 'LicenceNo' field from DbPipeline1 to your template. For assistance with adding this to your report, please ask a member of the Key-Data support team.

### **Version 6.2.8.2 completed 06 December 2016**

- The 'Accounts/Property/Property Charges' app now offers 'Legionnaires Assessment' as a selectable option in the defined charges drop-down list.
- The 'Contractor Management/Tools/Display Accounts' mechanism now reports the contractor name before each transaction. To add this to your reporting template (for both printable reports and exported data) go to: 'Edit Reports/Supplier Items/Transaction History' and add the field: 'ContName' from DbPipeline1 to your report template.

### **Version 6.2.8.1 completed 28th November 2016**

- Where the 'Reporting/Accounting/Profit & VAT/Revenue Generated From Property Charges' report is generated it is now possible to assign a landlord filter using the drop-down landlord selection box that appears.

### **Version 6.2.8.0 completed 22 November 2016**



- It is now possible to add further units to a previously replicated property. Prior to this version, once a property had been replicated into a defined number of rooms, flats, etc later additions were not possible. *Procedure: Select 'Mainscreen/Admin Tools/Replication Procedures/Property Replication/Edit Previous Replication'. Select the Parent property from the drop-down list and record the additional unit details.* NOTE: To ensure continuity in property addresses, if there were 10 previous rooms and you wish to add a further number, then numbering should start from 11.

### **Version 6.2.7.9 completed 16 November 2016**

- It is now possible for users to tell Key-Data Gold what order to use as the default for the 'Property Folder' file display list, previously, this was always on the document filename. *Procedure: Select the 'General' tab on the 'Mainscreen/Admin Tools/System/Preferences' screen and tick or untick the 'Default Property Folder Listing on Filename' option as required.*
- When a key is logged out through the: 'Property Management/Tools/Log Key Movement' app, the screen remains open to allow multiple keys to be logged out with ease.

### **Version 6.2.7.8 completed 11 November 2016**

- 'Right To Rent' reminders may now be de-activated and later re-activated, and their 'Reminder Dates' may be updated as required. As these activities are completed, the history of who made the alteration and when, is automatically maintained in the new 'Activity Notes' memo box on the 'Right To Rent' management screen. *Procedure: When in the 'Right To Rent' management screen right-clicking an existing reminder will bring up a menu that allows the user to select: 'De-activate Reminder', 'Re-activate Reminder' or 'Update Reminder Date'.*

### **Version 6.2.7.7 completed 02 November 2016**

- The 'Reporting/Property/EPC's To Be Arranged' report now orders the properties on the EPC renewal date (earliest first). Previously the report was ordered using the property address.
- **New Online Rentbook Feature:** An important new feature has been developed to allow your accommodated tenants real-time online access to their Key-Data Gold Rentbook and account balances. Additionally the feature allows tenants to make online payments against their outstanding balance. Research and feedback from users has shown that where tenants have access to their outstanding balance and an easy pay mechanism their payment against their rents and other transactions are much improved. This new feature is bundled along with the Key-Data Landlord Accounts Uploading module so if your agency already has this then the online tenant rentbook portal feature is available to you. If you have not previously ordered the online landlord accounts feature then this feature is available to your agency at just £25.00 PCM. Just ask us for a demonstration and we will be happy to show you this great addition to the system.
- It is now possible to add a tenants email address to the 'Reporting/Property/Gas Checks To Be Arranged (between dates)' report. *Procedure: 'Edit/Reports/Property Reports/Gas Check Report (between dates)' and add the field 'Email' that is linked to DbPipeline2.* For assistance with adding this to your report, please ask a member of the Key-Data support team.
- It is now possible for users to edit the 'Reporting/Property/Elect & Fire Checks to be arranged (between dates)' report. *Procedure: 'Mainscreen/Edit/Property Reports/Electrical & Fire Checks'.*
- **NEW HMO ACCOUNTING REPORT:** A new reporting feature has been added to the 'Reporting/Landlords' tab. The new 'HMO Occupancy & Rent Report' feature allows the user to derive rent, commission, repair, charge and arrears transaction and balance information on the parent property of the building. The result of this is that if the HMO property comprises 20 rooms, then the report brings together all transactions from all rooms into one easily digestible report. Previously this information was available from the 'Occupancy & Rents Reports' routine but each room was reported separately (this pre-existing feature remains untouched). Additionally the report may be generated to display just the summation balances for each accounting group, or alternately the balance supported by a breakdown of transactions that comprise the balance. The

generated report may be easily emailed to the landlord and other third-parties by selecting the 'email This Report' option. The report template may be edited by the user from the : 'Mainscreen/Edit/Reports/Landlord Items/HMO Occupancy & Rent Reports' routine.

- **ADDITIONAL CONTRACTOR REPORTING FEATURE:** The 'Contractor Management/Tools/Display Accounts' app now allows reporting and exports to be done on all contractor records. previously this functionality was limited to the selected contractor. Procedure: Simply enter a tick into the 'Report On All Contractors' option box.

#### **Version 6.2.7.6 completed 06 October 2016**

- Where a property is defined as being of the Type: 'Commercial Unit' and the Type 2 drop-down box is selected as being: ' Serviced Office' then the Rightmove Realtime upload realtime will now position the property in that category.

#### **Version 6.2.7.5 completed 25 September 2016**

- **ADDITIONAL SECURITY FEATURE:** The previously named 'No Landlord Edits' security option on the 'Mainform/Edit/User Details' screen has been renamed to: 'General Restrictions' and further system restrictions added. **New Restrictions:** Where this option is applied to a user then the ability to end a tenancy or finalise a tenants accounts has been added to the previous restrictions. *Note: to view all applied restrictions hold the cursor over the option box.*
- When a new user is defined, the default is now set to apply the 'General Restrictions' option.
- **NEW ACCOUNTING FEATURE:** It is now possible to define that a 'Recurring Office' cost should be automatically included in VAT reporting, previously only office costs directly related to a contractor/supplier, and hence had been recorded individually, were included. To alter a previously defined recurring cost, right-click it in the recurring office cost listing and select 'Edit Selected Item' and enter a tick in the 'Include in Office Account VAT Report' option. Future 'VAT Paid to Supplier' reports will include this recurring office cost. Additionally, the transaction will be included in the 'Composite VAT Summary' report under the 'Total Value of Purchases excluding VAT' value and the 'Input Tax' values.
- **ADDITIONAL USER SECURITY FEATURE:** It is now possible to define whether each user should have the access-rights to edit & delete Property/Landlord/Tenant/Applicant recorded comments from each Comment tab. Previously all users could do this, but now access-rights may be restricted as required. *Procedure: Use the 'No Comment Editing' option box on the 'Mainscreen/Edit/User Details' screen to define access to comment editing. The default is that users can currently continue as previously.*

#### **Version 6.2.7.4 completed 11 September 2016**

- Where the 'No Landlord Edits' option has been ticked on the 'Mainform/Edit/User Details' screen, in addition to access being restricted to the bank account details on the 'Detailed Landlord Record' screen, access to the 'Property Account' details has also now been restricted on the 'Detailed Property Information' screen.
- Where a property is defined as being of the Type: 'Commercial Unit' and the Type 2 drop-down box is selected as being: 'Warehouse' then the Rightmove Realtime upload will now position the property in the 'Warehouse' category in the Rightmove listing.

#### **Version 6.2.7.3 completed 05 September 2016**

- An additional office account financial report has been developed and added to the 'Account Management/Office Account/Category Balances' screen. The 'Profit & Loss' report option allows a date sensitive report to be generated that separates income and expense categories into separate sub-reports giving the total spend in each category. This is an improvement over the 'Category Balances (all)' option that essentially reported the same information but without any division between income and expense categories. Before using this new report, your agency will need to

set-up each nominal category as appropriate to define whether each is an income or expense account. This is done by going to: 'Account Management/Office Account/Edit Category Codes'. Here each category type is currently set to 'Unassigned', using the drop down selection box set each category to 'Income' or 'Expense' as appropriate.

- **HMO Property statement generation improvement:** Where a property has been replicated into several units, previously where a statement filter was requested at the time of generating the landlord statement, a separate statement for each property comprising the property had to be generated. This worked well for smaller HMO's, however where numerous units comprised the property it was a time-consuming task to generate a separate statement for each unit. This version of Key-Data Gold has addressed this issue. If the 'Compile All Transactions When Parent Selected' preference setting in the 'HMO Landlord Statements' area has been switched on in the 'Admin Tools/System/Preferences/Accounts tab', then where the parent unit for the property is selected in the property filter list then all collections, repairs, charges for all properties comprising the parent property are automatically filtered and reported on the landlord statement.
- The 'Reporting/Landlords/Complete List (with properties)' report now includes the 'Letting Type', ie: 'Let Only', 'Let & Collect' or 'Managed' for each property.

### **Version 6.2.7.2 completed 23 August 2016**

- It is now possible to tell Key-Data Gold to send email notifications to your company when a member of the Key-Data support team has replied to a logged support call ticket. Previously notifications were only emailed out when a ticket was closed. *Procedure: enter a tick into the: 'Dispatch email notifications for Key-Data replies' under the: 'Support Ticket Notifications' area on the 'General 2' tab of the 'Admin Tools/System/Preferences' screen. Additionally, if the 'Email Ticket Notifications to the Company Email Address' is left ticked, then replies will be emailed to the email address recorded on the: 'Mainscreen/Edit/Company Details/Address and Names' screen. If this option is un-ticked then notifications will be sent to the 'Reply To' address of the user that opened the support case.* Whilst this option may be preferable in many cases for large multi-user clients, if you are happy with the way the call-log ticketing system worked previously, then you need to do nothing.

### **Version 6.2.7.1 completed 17 August 2016**

- Service release only no new features

### **Version 6.2.7.0 completed 31 July 2016**

- The 'Email Setup' area of the 'Edit/User Details' screen now allows for SLL (Secure Sockets Layer) accounts to be setup and defined as the users primary email account for sending emails from Key-Data Gold. This is a more secure way to send emails and ideally should be employed by all Key-Data users. In addition to ticking this option, you will also have to record the 'Port' for sending the email: Most accounts appear to accept and work with 465, although your email account provider will be able to assist where required. If you experience issues setting up your own agent specific email account to send emails from Key-Data Gold, then you may like to register a free 'gmail' account and use this as your sending account (*remember that Key-Data Gold will allow you to easy define where your replies go back to*). To register for a new gmail account, just Google: 'get gmail account'. Agent SMTP settings for KDG are: 'smtp.gmail.com', you must tick both 'Requires Authentication' and 'Use SLL' and record your email address into: 'Send Using' and your password into: 'SMTP Password'. After a system restart, Key-Data Gold should be able to send using your own agent account. A setup example is displayed below:

email Set-up			
Display Name	Key-Data Systems	Reply email	accounts@key-data.co.uk
Send Using	keydatasystems@gmail.com	SMTP password	●●●●●●●●●●●●●●●●
Agent SMTP	smtp.gmail.com	Signature	Key-Data Systems
<input checked="" type="checkbox"/> Requires authentication <input checked="" type="checkbox"/> Use SLL		Port	465

### Version 6.2.6.9 completed 26 July 2016

- The SMTP password in the email set-up area is now hidden from view on the 'Edit Negotiator' and 'New Negotiator' screens.

### Version 6.2.6.8 completed 14 June 2016

- The latest version of the Office Diary (version 3.0.0.3), now allows for sms reminders to be sent not only to applicants on the day of the viewing, but also at the time of recording the viewing or at any time by editing the viewing. Also, in addition to sending the confirmations/reminders only to the applicants, the user can now also select to send them to the landlord/vendor and where appropriate the tenant in the property. *Procedure: When recording or editing a viewing, click the 'Contact Details' button. At the bottom of the screen that appears is the new option to send the confirmations/reminders.*
- Service Call transactions may now be ordered (using the drop down 'ordered on' box), on the contractor that has been assigned. This allows reports to be generated where the service calls are grouped together by contractor.
- The 'Locate Tenants From Property' search screen that is accessed from several places in Key-Data Gold, (eg: Account Management/Tenant Accounting/Agency Invoice) now offers the advance search functionality that is given on the main 'Property Information' screen. This means that the search text that is entered is automatically used and matched on all property address fields. This makes it much easier and quicker to locate a property, and hence the tenants in that property.

### Version 6.2.6.7 completed 06 June 2016

- Service release only no new features

### Version 6.2.6.6 completed 11th May 2016

- The number of days before property inspection reminders appeared in the 'Maintenance Scheduler' was previously set at 14 days. Where required, the time before these reminders appear may now be altered from 'Reminders' tab of the 'Admin Tools/System/Preferences' screen. The default number of days following this update is still 14 days so no action is required if your agency has been happy with this period.
- The 'Property Licencing' reminder has been re-located to the new 'Reminders (b)' tab on the 'Detailed Property Information' screen.
- A new Property Reminder has been added to the 'Reminders' tab of the 'Detailed Property Information' screen. The 'Rent Protection' option allows you to highlight the fact that property has insurance against tenant rent defaults. Additionally, it is possible to record a date of when the insurance becomes due for renewal along with notes regarding the insurance supplier. When the option is selected and a renewal date has been recorded, this will generate a reminder to automatically appear in the 'Mainscreen/Reminders Control Panel'. As with other reminders, when the reminder notification is clicked, the 'Property Reminder' management screen will be displayed and allow management of the event. Where a reminder date has been set, the default number of days before the reminder is

given is 14 days. Where a property is marked as having rent protection and the tenant has not been recorded as having 'Guaranteed Rent' then the user is notified when the tenants information screen is accessed. Additionally, The information memo box on the 'Property Information' screen adjacent to the property address on the right of the screen, displays the status of the cover.

- A new report has been added to the 'Reporting/Property Reports' selection box. The 'Rent Protection' option displays all properties where this option has been recorded.
- Where a landlord record screen is accessed and the landlord has properties with separate 'Property Accounts' defined (Property Accounts take precedence over the landlord bank details defined on their record screen for automatic internet payment routines), then a red label is displayed below the landlords 'Bank & Payment Details'. This alerts the user that altering the main landlord bank account will not have any affect on the account details assigned to the property of the landlord. If the alert label is clicked, then a list of the properties with separate accounts is displayed, and double-clicking a property in the list will bring up the properties 'Detailed Property Information' screen.

#### **Version 6.2.6.5 completed 04 May 2016**

- 'Direct Debit' has been added to the drop-down selection box for the 'Usually Pays By' option on the 'Contractor Management' screen.
- **ADDITIONAL SYSTEM/USER SECURITY:** The 'Mainform/Edit/User Details' screen now offers a new option that will limit a users access to editing certain landlord information. The 'No Landlord Edits' option has been defaulted to be unticked and so your system will continue to function as previously. However, if the option is ticked the following limitations will be applied to that user:
  - a) The user will not be able to alter the primary and secondary landlord name(s).
  - b) The User will not be able to edit landlord information that lies in the 'Bank & Payment Details' section of the landlord record sheet.

#### **Version 6.2.6.4 completed 18 April 2016**

- Service release only no new features

#### **Version 6.2.6.3 completed 05 April 2016**

- **NEW LANDLORD CONTACT FEATURE:** A great new feature has been developed to help you better stay in contact with your landlords. The 'Additional Details' tab of the 'Detailed Landlord Record' screen now offers a 'Last Contact' date. Note: This has currently been set to the date the landlord was registered on the system, and it may be altered manually using the drop-down calendar to bring the system up-to date immediately. When a new landlord comment is recorded this date is automatically updated, assuming the option box to do this is left ticked. Additionally when a landlord is sent a letter-communication, an email, or sms message either directly from their record screen or if they are included as part of a batch communication, the user is given the option to automatically update the last contact date and write this to the landlord comments list. Periodically, (maybe monthly so why not add an automatic reminder to your diary?), it would be a great idea to run the 'Reporting/Landlords/Not Contacted Since (selected date)' routine to keep a check on all landlords that need contacting. This routine allows you to select from one of several contact options, either individually or in a batch. Additionally, where the batch SMS or email routine is selected, then when the routine has

completed you are given the option to automatically update the landlords last contact date, and additionally make an entry in the landlords comments list for future reference

- **Batch Reminder Removal Utility:** A new administrative utility has been designed to assist clients when a large number of 'Maintenance Scheduler Reminders' need to be deleted to bring their Key-Data Gold system up-to date quickly. A member of the Key-Data support team will be happy to help you automatically batch delete maintenance reminders where necessary, so please do contact them for assistance. This new utility is available from 'Admin Tools/System/Batch Delete Reminders'

#### **Version 6.2.6.2 completed 22 March 2016**

- A new preference setting has been added to the 'Accounts' tab of the 'Admin Tools/System Preferences' screen. The 'Stop Statement Generation if Reserve Transfer Cannot Be Made' option under the 'Landlord Accounting' section controls whether the landlord statement routine is allowed to run without the transfer being made, or whether the landlord statement routine is just abandoned without the statement being displayed, if the transfer cannot be made. The default is to allow statement to be generated as previously.
- A new automatic 'Control Panel Reminder' has been added to supplement the recently added 'Proposed Tenancy Start Date' feature, (which is managed from the 'Task Management' tab of un-accommodated tenants). *Procedure: Where a tenancy start date has been added to an unaccommodated tenant, then three days before that date, a reminder will automatically appear in the 'Mainscreen/Reminders Control Panel'. As with other reminders, when the reminder notification is clicked, a screen will be displayed giving further information and offering quick access to the tenants record screen.*

#### **Version 6.2.6.1 completed 08 March 2016**

- The 'User Tools/Messaging Management' routine that processes and displays sms replies now offers a date filter. This filter has automatically been set to display sms messages for the last month only. Additionally, the results are ordered with most recent messages at the top, instead of at the bottom as previously.
- Where the Key-Data Realtime mechanism is used and the users Rightmove ID is blank, a message about this is now only given if the user has opted to upload to Rightmove.
- Where an automatic 'Reserve Account' transfer has been set for a landlord and the transfer request amount is greater than the amount due to the landlord, the user is notified of the requested transfer amount, and the actual amount due to and the payment routine is halted at that point. Previously the statement was generated, and had to be closed down and the routine abandoned before the transfer amount could be altered on the landlord record screen.

#### **Version 6.2.5.9-6.2.6.0 completed 29 February 2016**

- Service release only no new features

#### **Version 6.2.5.8 completed 07 February 2016**

- The 'Additional Filters' area of the 'Property Information' screen now offers a 'Service Type' filter that may be applied individually, or in conjunction with other available filters.
- The 'Internal Message Alert' screen that allows Key-Data users to send and manage internal messages, available from the 'Mainscreen/Cloud Support & Messaging' module,

now offers a link that may be clicked to toggle the list-table to display either open messages only (the default), or all messages. Previously closed messages could only be viewed if there were no open messages to be displayed to the user. Additionally the listing order is now on the date that the message was initially created.

- A new data-field has been added to the 'Rent Details' tab of the 'Detailed Property Information' screen. The 'Accounts Ref' field, positioned below the 'Rent Amount' field, allows for an agent defined reference code to be recorded against a property that is brought through to the 'Composite Revenue' report(s). This allows for effective report data filtering and ordering when the report is exported.
- A new 'Look & Feel' cosmetic skin has been applied to the default Key-Data Gold system that cosmetically alters the look and feel of screens and related components. The default 'skin' is called 'Light', this may be altered where required using the drop-down selection box on the 'General' tab of the 'Admin Tools/System/Preferences' screen. To remove all cosmetic options select the 'Classic' option.

#### **Version 6.2.5.7 completed 30th January 2016**

- Service release only no new features

#### **Version 6.2.5.6 completed 27th January 2016**

- The 'Internet Set-Up' tab of the 'Edit/Company Details/Address and Names' screen now offers an additional information field. The 'Rightmove Realtime: Filename Prefix' box should be used to record the Rightmove defined agent code. NOTE: Multi-branch users can define this field for each branch where necessary from the 'Admin Tools/Manage Branches/Edit Branch' screen.
- Further work completed toward the Rightmove Realtime mechanism.

#### **Version 6.2.5.5 completed 12 January 2016**

- The 'User Tools/Update To Web/Realtime Publishing' routine now offers a checkbox offering the option to populate your portfolio to the 'Rightmove' portal using their so called 'Realtime' upload mechanism. It is the view of Key-Data Systems, that whilst this new mechanism does offer a number of advantages compared to their original mechanism (and that employed by other advertising portals), it does not appear to be a genuine real-time publishing mechanism. During development and testing Key-Data Systems found that a refresh time of around an hour could be expected for new properties, with around 30-40 minutes for existing properties to be refreshed. As has already been explained to Key-Data clients, there is a cost of £25.00 PCM to use this facility. Please send an email to [accounts@key-data.co.uk](mailto:accounts@key-data.co.uk) to order this additional service.
- When a 'Custodial Deposit' is moved out to custody, the entry recorded in the tenant 'Rent Book' now shows the payment method that was used for the transaction.
- **LEGAL REGULATIONS:** In preparation for the new regulations regarding the necessity of checking applicants for their eligibility to rent property in the UK, (full information is available at <https://www.gov.uk/check-tenant-right-to-rent-documents>), a powerful, new logging and reminder mechanism has been designed and added to your Key-Data Gold system. *Procedures: **Recording Evidence:** On the 'Detailed Tenancy Record' screen, under the 'Primary Tenant' and 'Secondary Tenant' details areas, you will notice new 'Right To Rent' link options. **NOTE:** There are similar links on the 'Additional Tenants' screen, so that each individual tenant has their own link.*

Clicking these links allows you to record the evidence that was supplied to you from that applicant/pre-tenant. You can either select the document from the drop down box, or type your own text. Additionally there is an area to record any appropriate notes. If the evidence supplied has an expiry date, as in the case of a VISA, then you can record this using the date picker. Finally, click the 'Enter' button to record this evidence, and the record will then appear in the top display table. **Reminders:** Seven days before an expiry date is reached, a reminder will automatically appear on your Key-Data Desktop in your 'Reminder Control Panel'. Clicking the reminder will display the documents coming up for renewal, and double-clicking each reminder will take you to the 'Detailed Tenancy Record'.

#### **Version 6.2.5.4 completed 04 December 2015**

- The 'Admin Tools/Archive & Delete Routines/Manage Dormant Status (properties)' screen now offers a fast access button to a properties 'Detailed Property Information Screen'. This is useful for identifying and managing events and reminders stopping the property being made dormant.
- **MULTI-BRANCH FEATURE UPDATE:** Where a user has been assigned to a branch and a filter on the 'Maintenance Scheduler' has automatically been applied, it is now possible for the user to remove the branch filter to view all events across all branches.
- To avoid ambiguity, the stated 'Balance' figure on the 'Reporting/Accounting/Tenant Credit Bank Report (all)' screen and printable report has been renamed to 'Current Balance'.

#### **Version 6.2.5.3 completed 26 November 2015**

- **ADVANCED REPORTING FEATURE:** The 'Reporting/Accounting/Profit & VAT/Total Rents Collected' report may now additionally be generated to an Adobe file or in a spreadsheet format for further manipulation. Additionally the properties 'Service Type' is displayed on the report and the report is now ordered and grouped on the service type followed by the property address. This allows for income by Service Type information to be more easily extracted. NOTE: When generated in spreadsheet format, best results are obtained by selecting the 'XLS Date File' type from the file generation screen.

#### **Version 6.2.5.2 completed 22 November 2015**

- **MULTI-BRANCH FEATURE UPDATE:** The 'Maintenance Scheduler' now offers a 'Branch Filter' that displays only events related to the selected branch. Additionally, where a user is assigned to a branch, then by default they will see only maintenance events related to their branch.
- It is now possible to add landlord contact information to your 'Contractor Job-Sheet' template where this is required. Whilst landlord name(s) information was already catered for using the <Landlord1> and <Landlord2> datafields, the following additional fields may be added: Telephone: <lltel> (dbtext component), Mobile: <llmobile> (dbtext component), Email: <llemail> (dbmemo component). For assistance in editing your report template this please do not hesitate to contact Key-Data support.
- **A NEW 'OCCUPANCY RATE CALCULATOR' FEATURE** has been added to the 'Mainscreen/Admin Tools' menu. The calculator allows you to enter a date range and be told the occupancy rate, both in days and percentage format, for a selected property.



By ticking the 'Report On All Current Properties' option, a report will be automatically generated on each property in your portfolio.

- **FOUR NEW 'PROPERTY REMINDERS'** have been added to the 'Maintenance' tab of the 'Detailed Property Information' screen. The 'HMO Certificate Reminders' area allows you to record: 'Fire Alarm', 'Fire Equipment', 'Fire Lighting' and 'Licence' check dates. When a date has been recorded, this will generate a reminder to automatically appear in the 'Mainscreen/Reminders Control Panel'. *As with other reminders, when the reminder notification is clicked, the 'Property Reminder' management screen will be displayed and allow management of the event. Where a reminder date has been set, the default number of days before the reminder is given is 14 days.*
- When a Tenancy Deposit is 'topped up', the requirement to have a certificate granted by Key-Data Systems has been removed.
- **THE RECENTLY ADDED 'BATCH HTML EMAILING' ROUTINE HAS BEEN FURTHER DEVELOPED AND REFINED.** It is now possible for a company to maintain a bank of graphic images and text statements that can quickly each be incorporated into the html email by selection from a drop down box. This is ideal for quickly generating a variety of marketing emails and layouts. *Procedure: When at the online email composition screen, select the 'Graphic' option to manage your graphic bank and the 'Text' option to manage your text bank. Select the 'Add' option to define the graphic/text. The options added will be available at all future times when you return to the email composition screen.*

#### **Version 6.2.5.1 completed 12 November 2015**

- Service release only no new features

#### **Version 6.2.5.0 completed 05 November 2015**

- The Key-Data Gold application logo has been updated to the white key in the blue circle as is used in all other Key-Data areas.

#### **Version 6.2.4.9 completed 02 November 2015**

- **MULTI-BRANCH FEATURE UPDATE:** Where a multi-branch client user is assigned to a property from the 'Additional' tab of the 'Detailed Property Information' screen, a message is now supplied to the user asking for confirmation of whether they wish to alter the branch the property is assigned to, to that of the selected user.
- It is now possible to add a properties 'BranchId' field to the 'Reporting/Tenants/Vacating (between dates)' report. For multi-branch users, where this report is exported, this new field allows the report to be grouped by the branch.
- **IT IS NOW POSSIBLE TO AUTOMATICALLY MOVE 'PROPERTY GAS CHECK' NOTIFICATIONS FROM THE 'TIME MANAGEMENT/MAINTENANCE SCHEDULER' TO THE 'SERVICE CALL CENTRE'.** This greatly speeds up and simplifies the management of the event, as previously it was necessary to manage 2 separate events in the 'Scheduler' and an event in the 'Service Call Centre'. Whilst the previous procedure that your agency has followed will still function in the same way, it may be advantageous to try the following improved procedure:
  - f) The 'Property Gas Check' notification appears in the scheduler.
  - g) Double-click the event to open the management screen. Write/email the tenants as previously to arrange the inspection, and record this in the 'Event Progress Notes' box.

- h) Click the 'Move to Service call Centre' link below the management buttons and confirm your wish.
- i) Look in the 'Time Management/Service Call Management' module and locate the newly recorded 'Property Gas Check' event. Assign the contractor to the event and generate/email the job-sheet to the contractor. Double-click the event to manage it, and record this in the 'Work in Progress Notes'.
- j) Use the Service Call Centre to further manage this event to completion, and then click the 'New Gas Certificate' button on the management screen to record the next gas inspection date: NOTE the awarding of the new certificate functions in exactly the same way as previously.
- k) The item is removed from the 'Service Call Centre' and automatically recorded in the 'Property History List' for future reference.