

Release Notes

RPM – Version 2.52

This document contains a list of new functionalities available in the 2.52 version of RPM Property Management Software from CPL Software. It also contains a note of new modules available, Issues fixed in this release and a summary of what will be coming along in the next release.

Introduction

This release of RPM contains a number of additional features and updated items. Please contact CPL Software should you require any additional training for this release.

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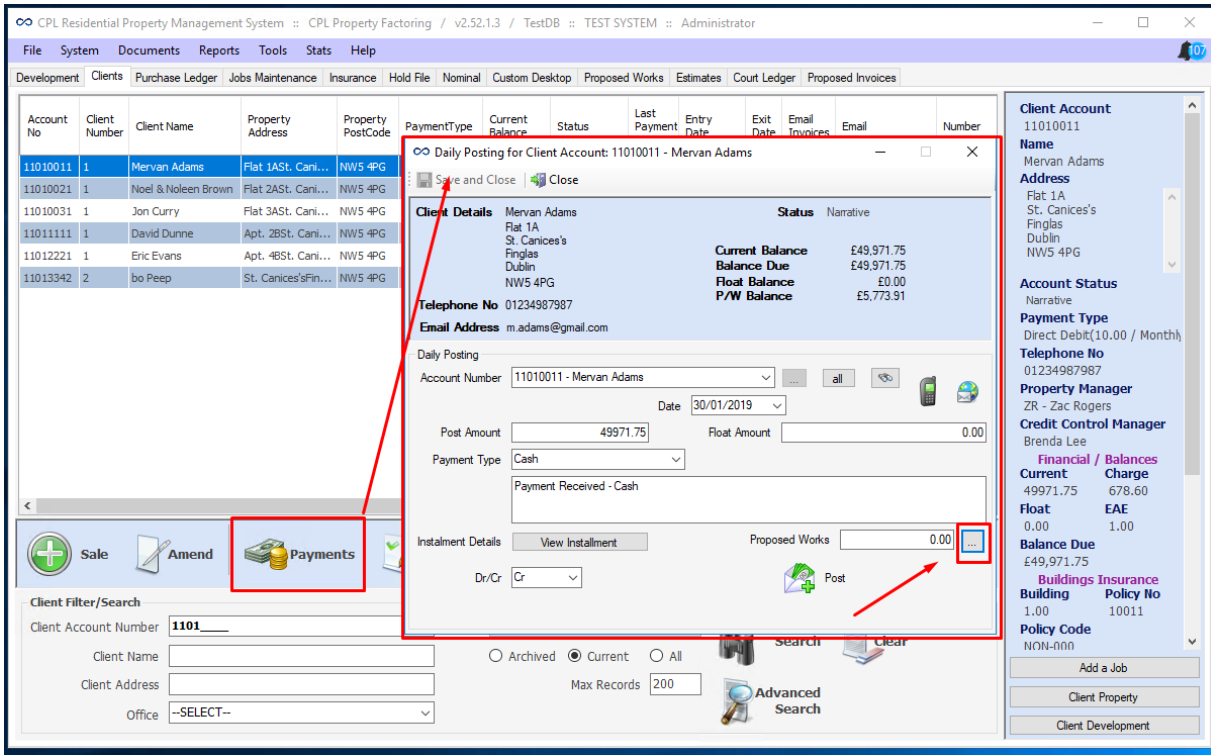
Additional Features

RPM-8475 Active Proposed Works Table - Additional Column suggestion

We have added a Work Number column to the Proposed Works table.

This is accessed via:

Client master tab - Payments Icon - Daily Posting screen and selecting the Proposed Works '...' additional options box.



This then displays the Active Proposed Works table with the new Column 'Work No'

Work No	Proposed Work	Payable	Paid	Outstanding	To Pay
20134	Web Portal test	166.67	66.67	100.00	0.00
10118	Sue	778.67	100.00	678.67	0.00
20145	regression	2.00	0.00	2.00	0.00
20136	Web Test 2	100.00	0.00	100.00	0.00
20119	Test PW type change	152.04	0.00	152.04	0.00
20170	Regression 2.51	40.00	0.00	40.00	0.00
20125	sjc Test	4701.20	0.00	4701.20	0.00
20142	Tried to create work with...	40.00	40.00	0.00	0.00
20139	Regression2.45 Test	941.00	941.00	0.00	0.00

[RPM-9048 Add New Permission called 'JobsTab Elevated'](#)

There is a SystemSetting ' ShowJobInsuranceWarnings', which if turned on lists issues with Contractors on the Jobs page. The new permission 'JobsTab Elevated' determines if the User can continue using the selected Contractor if warnings are raised. 'JobsTab Elevated' is now required to use a Contractor who:-

1. Has Warnings raised
2. Is Stopped
3. Is not approved for the Development

[RPM-9155 New Advanced Dashboard Card - Summary Screen](#)

We have implemented a New Dashboard screen to show visual representations (graphs) of high level statistics. These include the following graphs:

1. Inspections Completed in Last Month per User – Represented by a Horizontal bar Chart
2. Total Debt per Property Manager - Represented by a Bar Chart
3. Top 5 Developments by Debt - Represented by a Bar Chart
4. Top 5 Inspections Due per User - Represented by a Bar Chart
5. Property Managers with Client Notices Due - Represented by a Bar Chart
6. Graphical Representation of In-Tray Stats - Represented by a Pie Chart
7. Contractor Performance (Overdue Documents, Insurance etc) - Represented by a Pie Chart
8. Global Balance over the Last 12 months - Represented by a Line graph

[RPM-9187 Add export function to Estimates master search tab](#)

It is now possible to Right click and Export the main grid on the Estimates tab.

[RPM-9191 Release Notes change](#)

Until now, Release Notes used to be available on the Kayako Knowledge Base with a link from RPM. This has changed so that the PDFs themselves are included with the RPM build and a User can click the selected version to view the Release Notes PDF.

[RPM-9197 Estimate quote email - new system setting 'EstimateEmailFrom'](#)

We have added a New System Setting for when you wish to choose a separate address for Sending Estimates from. The "EstimateEmailFrom" setting when active works similar to the Work Order email from setting. RPM uses this address as the From Address when sending Estimate quotes.

When nothing is entered here, RPM continues to use the Current User's From Address.

[RPM-9217 Enhancement to Development Warranty Dates / Contractors Dashboard](#)

As part of a full review of the Development and Contractors cards in the Dashboard Module, we have added an editable 'notes' field to the Development Warranty Dates Dashboard Card. This can now be viewed and edited via the Warranty Dates Dashboard Card and the Warranty Date record itself. To Add or Amend a note, Right click the grid row and select 'edit notes'.

We have also added the 'Open Development' button to the 'Jobs Overdue for Warranty Dates' grid and the 'non-actioned In-Tray files' grid. These open the Development linked to the currently selected row.

We have also added a new column to the Jobs Overdue grid to show the age in months and days since the Job was raised.

RPM-9230 Re-order the documents tab columns

To make the information easier to understand on a Clients Account, we have reordered the Columns in the Documents History.

RPM-9287 Web Portal - new API Setting 'ShowArchivedPWButton'

This New Setting for portals, adds a much-needed feature for your Proposed Work records, so that you can now view archived works. This allows your users to see relevant information easily on the main screen and if they need to see older information, they can find it at the click of a button.

The screenshot shows the 'Property Management' web portal interface. At the top, there is a navigation bar with tabs for Home, Accounts, Documents, Proposed Work, Jobs, and Develop. Below the navigation bar, the main heading is 'Proposed Works' with a sub-note 'You can edit what goes here 8'. A 'Show Archived' button is highlighted with a red box. Below the button is a table with columns: No, Created, Name, Description, Status, Type, Target, and Achieved. The table contains several rows of work records.

No	Created	Name	Description	Status	Type	Target	Achieved
20170	12/12/2018 14:19:18	Regression 2.51	test 2.51	Work In Progress	Normal	£120.00	£0.00
20145	24/04/2018 16:59:46	regression	test regression	Work In Progress	Normal	£10.00	£0.00
20142	16/04/2018 12:43:14	Tried to create work with an expired Contractor	create work with an expired Contractor	Work In Progress	Normal	£120.00	£0.00
20139	14/03/2018 10:03:32	Regression2.45 Test	Regression Test	Work In Progress	Normal	£4623.00	£0.00
20136	09/02/2018 13:02:26	Web Test 2		Work In Progress	Normal	£300.00	£100.00
20134	09/02/2018 12:57:33	Web Portal test		Awaiting Client Funds	Normal	£500.00	£233.34
20132	31/01/2018 12:04:09	Vote Status Testing 1	Vote Status Testing 1	Work In Progress	Voting Only	£1900.00	£0.00
20127	20/12/2017 16:49:31	This is an Add Prop. Works	test add PW	Work In Progress	Normal	£220.00	£0.00

Please contact RPM Support, quoting 'RPM-9287' if you would like this setting changed.

RPM-9288 Web Portal - new API Setting 'ShowCompletedJobsButton'

We have added the option to show Completed Jobs on the Portal, this allows your Clients to review job details and check when previous Jobs of the same type were completed.

Software

Currently viewing property: Flat 1A St. Canices's Finglas Dublin (11010011)

Home Accounts Documents Proposed Work Jobs Develop

Jobs

You can edit what goes here 14

Show Completed

Jobs List Details Documents

Order No	Date Created	Description	Contractor	Status	Last Updated
4471801	12/12/2018	this is a test 2.51	1101 Handy_sjc	Job In Progress	12/12/2018
4471601	11/12/2018	2.51 Norm	1005 Insurance Company 1005	Job In Progress	11/12/2018
4468601	12/10/2018	Test INsurance claim Type What is Lor...	1101 Handy_sjc	Job In Progress	12/10/2018
4468401	10/10/2018	rqewrqwe	1101 Handy_sjc	Job In Progress	10/10/2018
4468301	10/10/2018	2.50 test - test	Gas Company 98 Gas Company 98	Job In Progress	10/10/2018

Please contact RPM Support, quoting 'RPM-9288' if you would like this setting changed.

RPM-9290 Web Portal PW voting - Add a confirmation screen

When Voting on a Proposed Work, we have added a Confirmation screen before submitting the vote. This feature allows the user to double check their vote is correct.

Currently viewing property: qery astdg asdfsa London (11040011)

Change Property Add Property

Home Accounts Documents Proposed Work Jobs Development Credit Control Budgets

Proposed Works

You can edit what goes here 8

Show Archived

List Details Documents

Please vote on whether you would agree for this proposed work to go forward.

FOR AGAINST

£2.50 share outstanding to be paid.

MAKE PROPOSED WORK PAYMENT

Your Outstanding Balance

Current Balance: £179.57

MAKE PAYMENT

You are currently paying by Direct Debit for a Monthly amount of £15.00.

This will change to an amount of £57.00 from 01/04/2019.

Development Information

Development Name

This is a long name for test purposes but not too

Property Manager Information

You are voting AGAINST this Proposed Work. You will not have the opportunity to change your vote. Do you wish to place this vote?

YES NO

RPM-9291 Web portal/API - PW vote narrative to store date and time.

In addition to RPM-9290, we have added improved tracking to the Proposed Works narrative on the vote. Not only does it note how the vote was submitted (via Web Portal) it now records the time and date and whether the vote was via the Web or App. giving the User more Information if a Customer requires it.

RPM-9292 Resource Centre - Show Resource Category on grid

We have Added the 'Resource Category' column to the DataGrid in the Resource centre.

[RPM-9293 Warranty Dates - No of Times to run Change](#)

Development Warranty Documents and the Related Inspections will not expire after the interval setting any longer but at the time of the Expiry of the Warranty.

RPM now calculates the period based on the No. of Times to run (e.g. 2 = 6 monthly, 4 = 3 monthly, 12 = every month). It no longer cuts off after it has processed one year, it now carries on adding the relevant number of months to the Expiry Date of the Warranty.

[RPM-9296 Client Document Distribution Filter - Direct Debit Frequency](#)

We have added a filter when selecting Direct Debit as Payment Type in the Document Distribute tool. These only show when selecting Direct Debit. The options in the drop down are "Fixed" and "Variable" allowing you to further filter who receives the Documents and Letters you send via RPM.

[RPM-9303 Client Send Email Correspondence - Streamline user process](#)

We have smoothed the process for sending a single Client an email via RPM.

Rather than the selection process and filtering down to one Client as you have had to do previously, the steps have been reduced to the following:

- Email
- Email Per Recipient
- Send to default email for Client
- CC or BCC
- Signature

This Speeds up the process when you only send Documents to a single Client and helps make your work flows more efficient.

[RPM-9306 Drag and Drop emails into RPM - Read and store email address if not already present.](#)

A check has been added to help populate your Client's email addresses in an effort to help our Clients move away from printed correspondence . When dragging an email in or Linking via the In-Tray Add-On from Outlook if the sender email address doesn't exist on the Client's account, a dialog box displays asking:

'Email address [XXXX@email.com](#) doesn't exist on this Clients Account.
Would you like to add it?
Yes | No'

This also happens when linking via the In-Tray System.

[RPM-9307 Correspondence Wizard - HTML emails](#)

We have added HTML support to RPM's Correspondence wizard. To access this feature simply Click the Documents menu item and select Send Out to open the Documents: Distribute (New) screen.

Select one or more Recipients and click the Email / SMS button. This opens the Correspondence Wizard. Follow the process through until you reach the Email Subject Body screen. You now see a new menu bar at the top of the message body screen offering you multiple ways of enriching your mail outs.

[RPM-9319 new System Setting 'ClientNoticeType'](#)

We have added a setting to clarify where and when you can use certain types of reports.

When sending client notices via Document mail merge, the setting disables the email and print buttons and only enables the mail merge button.

When sending client notices via a Custom Report, the system disables the mail merge button and only enables the print and email buttons.

This should bring clarity in which options you wish your users to use.

[RPM-9328 Proposed invoice - Add notes field](#)

A new notes field has been added to the Proposed Invoice posting and amendment screens.

The information provided in these fields is represented on the PL Transaction Invoice activity and the PL Hold file when accepted.

[RPM-9344 Add EAE field to the Property - Property Details user report focus](#)

In order to give you more relevant information from the Reports tool, we have added the EAE field to the Property - Property Details User Report focus. This has been requested by our Clients over the past few months and we are able to now fulfil those requests.

[RPM-9370 In Tray Allocate file permission](#)

We have added a New Permission to the Allocate File option in the In-Tray tool, if Users do not have this Permission, they do not have access to 'Set Selected File to Allocated'.

Super Users have full access as usual, however anyone without this Permission is no longer able to use the Allocation option.

[RPM-9378 New System Setting Job Search Current/All default](#)

In a recent version, we altered the Job Search to default to only show Current Jobs, some users miss the old Search. We have added a System Setting which switches between showing Current or All as the default Job Search.

Please contact RPM Support, quoting 'RPM-9378' if you would like this setting changed.

[RPM-9395 Calculate Direct Debit function](#)

We have added a new button 'Calculate Direct Debit' on the Client Account page.

This new feature will automatically calculate the Direct Debit amounts that a Client needs to pay to cover their EAE, plus an Elevated Payment if required to clear any outstanding or upcoming balance over the first three payments.

It calculates the Next Payment Date based on two System Settings:-

DirectDebitDefaultCollectionDay = Day of the month collections are taken, e.g. 1 = 1st of the month.

MinDDPeriodDays = The lead time in working days required to set up a Direct Debit, e.g. 10.

It calculates the Elevated Payment based on outstanding balance, and any Invoices that are due to be raised before the Next Payment Date, i.e. the amount the Client's balance will increase by before their direct debit starts.

[RPM-9399 New client doc distribute filter ElevatedDDPayment](#)

We have added a New filter to the Document Distribution System called 'Client has Elevated DD Payment', when selected RPM only returns Clients who have Payment Type of Direct Debit and that have a Current Elevated Payment Plan.

[RPM-9423 Jobs PL account search permissions](#)

As part of the review of the Purchase Ledger Account Search Permissions change (RPM-9048) We have also split the 'Allow Approved Contractors;' and 'Allow Contractors for Other Job Types' functions into 2 different Permissions.

The check for Job Types Part of the old Permission has been assigned to a new Permission called 'Job Tab Allow Non-Approved Job Types' allowing the Super users greater control over who can do what in RPM.

[RPM-9429 New Client Notice Filter - Client Type](#)

Under Client Notices we have added a new filter allowing you to filter between Clients or Developers. If you do not wish to filter these simply leave the box set at select.

[RPM-9445 Development Estimates Screen via client](#)

We have revised the way the Estimates tabs work when you have a Client's Account open and go to a Development via a Client, then to the Development Estimates tab, it now shows All Estimates for the Development, rather than Client specific Estimates.

END