



Release Notes

RPM – Version 2.51

This document contains a list of new functionalities available in the 2.51 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 this 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-7966 Amend Client's Post Code & Save

Previously, there was an issue with changes to the Client's Postcode not being reflected on the Client's Tab. This has now been adjusted and the amendments are visible.

RPM-8130 Job Maintenance - In Tray option - disable if not Invoice Number

When a Job on the Maintenance tab did not have an Order Number, upon being selected with a right Click, only the Export and Print Only Options were available. The Add In-Tray Memo option only becomes available if the job has an Order Number. Previously the system attached the memo to the Job Order Number, the system has been updated to add the memo to the Job itself resolving this issue.

RPM-8177 Change to Development Key Tracking

There were several issues have been raised with us in regards to the Key Tracking within the Developments tab. The Key Tracking System has had a major overhaul in regards to the process. While the System looks and feel different, the improvements mean the Key Tracking System now works much more intuitively.

The Major Changes to note are as follows:

RPM-8185 Development Keys - Overdue Report - showing one key out to two different Contractors at the same time

We have updated the Overdue Keys Report to display more up to date information in regards to keys and their location.

RPM-8194 Post Purchase Ledger Transactions screen - Information message box

We have altered the Post Purchase Ledger Information pop up box layout to make it clearer to read.

RPM-8530 Entering a Budget for a Budgeted Development – Date Dropdown box selection.

A new system setting has been added that governs how far into the future the date boxes on the Budgets screen in RPM will display when setting up a new budget. This setting defaults to Three years in advance, but can easily be changed by contacting CPL Support.

RPM-8785 Credit Control Summary display is not correct

We have reviewed how the Credit Control Summary screen gathers information to display. The breakdown window (at the bottom of the screen) works much smoother now and the information is refreshed to reflect the selected entry in the Summary Table above.

RPM-8813 - Export Insurance Tab

We have added the Export Grid functionality (Via Right-clicking on the grid) to the Insurance tab in the same way as most other tabs operate.

RPM-8840 Purchase Ledger Safety Check to avoid change errors when paying Contractors.

We have added further Checks to RPM's Purchase Ledger Transactions system to check that no further changes have been made before payments are processed.

RPM-8841 PL Payments – Add BACS Batch Number when Processing BACS payments

Previously in Purchase Ledger Payments only the Batch Number was displaying when Processing BACS payments. We have added the BACS Batch Number to the pop up alert box where applicable.

RPM-8847 Dev Apportionment Report – Show Apportionment Totals

When processing a Development Apportionment Report in Reports, the Developments column did not show a total, meaning you could not glance at the report to look for Apportionment Discrepancies. We have now added a Total line in at the bottom of each Apportionment which displays the Total.

RPM-8864 Document Distribute PDF preview button

Some word documents that include objects such as images and tables previously lost their original formatting when converted to a PDF.

We have added a 'Preview PDF' button to the Document Distribute screen that loads the first record in the batch as a PDF. The user has the ability to go back and make tweaks to the template and then preview the PDF again to make sure that the final emailed copy will look as expected.

Recipient	Last Emailed	Emailed
<input checked="" type="checkbox"/> 11010011 - Mer...	01/11/2017	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11010021 - Noe...	13/11/2017	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11010031 - Jon...	13/11/2017	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11011111 - Dav...	22/11/2017	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11012221 - Eric...	22/11/2017	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11013342 - bo ...	26/11/2018	<input type="checkbox"/>
<input type="checkbox"/> 11021011 - Kev...	30/01/2018	<input type="checkbox"/>
<input type="checkbox"/> 11021022 - Lou...	19/11/2018	<input type="checkbox"/>
<input type="checkbox"/> 11021031 - Cla...	06/07/2018	<input type="checkbox"/>
<input type="checkbox"/> 11021041 - Cir...	21/03/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11021051 - Sca...	29/08/2018	<input type="checkbox"/>
<input type="checkbox"/> 11030012 - SJ ...	09/02/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030021 - xSi...	28/03/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030031 - SJ ...	18/04/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030041 - SJ ...	18/04/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030054 - Dan...		<input type="checkbox"/>
<input type="checkbox"/> 11030061 - SJ ...	18/04/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030071 - SJ ...	18/04/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030081 - SJ ...	18/04/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030091 - SJ ...	18/04/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030101 - SJ ...	18/04/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030111 - Dav...	18/04/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11030123 - Ne...		<input type="checkbox"/>
<input type="checkbox"/> 11040011 - Clie...	11/05/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11040021 - Clie...	11/05/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11040033 - res...		<input type="checkbox"/>
<input type="checkbox"/> 11040041 - Clie...	11/05/2018	<input checked="" type="checkbox"/>
<input type="checkbox"/> 11050011 - Aha...	10/02/2018	<input checked="" type="checkbox"/>

RPM-8880 Add Select All Check boxes to the Advanced Dashboard setting screen

We have added Select All Check boxes to the Advanced Dashboard Setting Screen so that if you want to Select All of the Modules and Include the Subordinates you may now do so.

Dashboard Module	Active	Include Subordinates
Development Warranty Dates	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client Notices	<input type="checkbox"/>	<input type="checkbox"/>
Contractors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jobs	<input type="checkbox"/>	<input type="checkbox"/>
Hold Files	<input type="checkbox"/>	<input type="checkbox"/>
Estimates	<input type="checkbox"/>	<input type="checkbox"/>
Expiring Warranties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
In Tray	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pending Direct Debit Setups	<input type="checkbox"/>	<input type="checkbox"/>
Proposed Invoices	<input type="checkbox"/>	<input type="checkbox"/>

RPM-8883 Estimates at Development Level

Added a new Estimate functionality at a Development level.

We have added an Estimates tab on the Developments, allowing you to now raise an Estimate direct from each Development. We also added greater search functionality here, such as Job Type. This allows you to see only Jobs relevant to the Development you are in, to search using keywords, and to filter by job type.

RPM-8992 Add Next Allocated User to the Job grid

We have added a 'Next Allocated User' column to the Job Maintenance grid/table, making the workflow of a Job easier to follow.

The screenshot shows the 'Job Maintenance' grid in the RPM software. The grid has columns for Job, Updated User, Order, Created Date, Priority, Created User, Development, Status, Updated Date, Job Type, Date/Time, Task, Notes, Allocated User, and a new 'Next Allocated User' column highlighted in red. The 'Next Allocated User' column contains the name of the user who is next in line to be allocated to the job.

Job	Updated User	Order	Created Date	Priority	Created User	Development	Status	Updated Date	Job Type	Date/Time	Task	Notes	Allocated User	Next Allocated User
34537			14/03/2018 10:26		Administrator	1101 Test World	PSC		Misc	14/03/2018 10:26	1		Administrator	Administrator
34538	Sindy	3453801	23/03/2018 14:53	Urgent	Sindy	0001 Dev 21 - Adv	CAI	23/03/2018 14:54	CCTV	23/03/2018 14:53	1		Administrator	Administrator
34539			23/03/2018 14:09		Administrator	1106 Budgeted Development	PSC		All Trades	23/03/2018 14:09	1		Administrator	Administrator
34542			26/03/2018 17:32		Administrator	1110 Buddy's Bud Dundee Development	PSC		Walker	26/03/2018 17:32	1		Administrator	Administrator
34544			26/03/2018 17:33		Administrator	0001 The Crescents	PSC		Aerial Repair	26/03/2018 17:33	1		Administrator	Administrator
34545			26/03/2018 17:33		Administrator	1102 Test 2 World	PSC		Sign Printer	26/03/2018 17:33	1		Administrator	Administrator
34550		3455001	04/04/2018 17:21	Imperative	Sindy	1105 New Name 1105 Dev - length of a developments ...	CAI		Chimney Sweep	04/04/2018 17:21	1		Sindy	Sindy
34551			10/04/2018 15:51		Administrator	1101 Test World	PSC		Painter	10/04/2018 15:51	1		Administrator	Administrator
34553		3455301	16/04/2018 12:43	Imperative	Bat Man	1101 Test World	JP		Misc	16/04/2018 12:43	1		Bat Man	Bat Man
34557		3455701	20/04/2018 10:47	Imperative	Sindy	1110 Buddy's Bud Dundee Development	JP		Walker	20/04/2018 10:47	1		Sindy	Sindy
34558		3455801	20/04/2018 12:33	Imperative	Sindy	0612 Dev 612	JP		Painter	20/04/2018 12:33	1		Sindy	Sindy
34562		3456201	24/04/2018 17:01	Imperative	Administrator	1101 Test World	JP		In House	24/04/2018 17:01	1		Administrator	Administrator
34563		3456301	24/04/2018 17:09	Imperative	Administrator	1106 Budgeted Development	CAI		All Trades	24/04/2018 17:09	1		Administrator	Administrator
34564			24/04/2018 17:11		Administrator	1106 Budgeted Development	PSC		All Trades	24/04/2018 17:11	1		Administrator	Administrator
34576			01/05/2018 15:36		Sindy	1113 T2 Budgeted	PSC		Pest Control	01/05/2018 15:36	1		Sindy	Sindy
34577			02/05/2018 11:43		Sindy	1113 T2 Budgeted	PSC		Pest Control	02/05/2018 11:43	1		Sindy	Sindy
34578			02/05/2018 11:46		Sindy	1104 This is a lons name for test purposes but not boot	PSC		Bulldozer	02/05/2018 11:44	1		Sindy	Sindy

RPM-8964 Budget invoice print list- Show batches

Budgeted Developments Invoice printing now works similar to the Actual Accounting Developments. A list of batches is now shown that have not yet been Accepted, allowing the user to individually run the Report for Print Batches and then Accept them.

RPM-8965 New In tray record type- Inspections

In the In-Tray system, there is a new Record Type called 'Inspections'. This option list Developments, and upon selecting the relevant link, you can now open the Inspection Document Upload screen. This selection from the In-Tray saves to the Inspection tab for the Development in RPM, rather than opening the Normal Document Upload screen.

The screenshot shows the 'Scanned Documents In-Tray' screen. It features a search bar, a 'Record Type' dropdown menu set to 'Clients', and a list of records. The records include columns for Reference, Description, and Scanned Date. A record with Reference '0001053' and Description 'Gary Green - 00010591 Dev 1 Street' is highlighted. The 'Inspections' record type is visible in the dropdown menu.

Reference	Description	Scanned Date
0001052	Adrian Insurance Policy	
0001053	Gary Green - 00010591 Dev 1 Street	
0001054	Christine Collins - 0001054 Dev 1 Street	
0001055	Devon Davidson - 0001055 Dev 1 Street	
0001056	Emma Evans - 0001056 Dev 1 Street	
0001057	Fred Flintstone - 0001057 Dev 1 Street	
0001058	Gary Green - 0001058 Dev 1 Street	
0001059	Gary Green - 0001059 Dev 1 Street	

RPM-8980 Web Portal -Force Users to Change Their Temp Password on Initial Login

From this release onward, upon first use, Web portal users will be prompted to change their temporary password. RPM users can also force a web user to change password via the web user widget on the custom desktop tab.

RPM-8981 New Text Item on Payments Page on Portal / App

Web Portal and App Customers will notice a change to the Payments screen informing the Clients of how the Payment they are making will be Allocated (such as, Float, Proposed Work, Account). Please contact RPM Support, quoting 'RPM-9881' if you would like this setting changed.

RPM-8992 Add Next Allocated User to the Job grid

We have added a Next Allocated User Column to the Jobs Maintenance Grid. As with the other Columns on this grid it can be relocated anywhere in the grid you wish by dragging the Column Header.

RPM-9005 Add 'Job Type' filter and column to the W/M Widget in Custom Desktop

We have added a Job Type filter and a Job Type Column to the Warranties Maintenance Widget on the Custom Desktop in RPM, making the task of searching for expired Warranties much easier.

RPM-9013 Notification System

The Notification System has been updated and now will Notify a user that they have new mail and present the user with a link to open the In-Tray in a pop-up box. Note this is only available with the 'Email Parser' module.

RPM-9029 Add Intro Letter 'Sent' Filter to Document Distribute

We have added a New filter to the Document Distribute System called Intro Letter Sent. These two check boxes allow you to filter for Intro Letters Sent or Not Sent and can be further filtered by Date. Please note any intro letters entered onto RPM prior to this release will not have the relevant date data attached to them and as such the filter will not recognise them.

RPM-9042 Yearly DD update performance issues

We have improved the speed and loading of the Direct Debit Yearly Update process to help ease issues arising from running this process and the impact on other local RPM users.

RPM-9043 Filter on custom desktop for inspection dates incorrectly sorting

The filter on the Inspection Dates widget has been changed to sort the Date Columns in a more intuitive manner.

RPM-9044 Diarised Charges - Standard Descriptions

Any Hold File created from Diarised Charges now list the Diarised Charges Standard Description when used. This makes checking Diarised Charges prior to Processing a much clearer process.

RPM-9045 Add the prelist report back into the monthly direct debit run

As requested, the Direct Debit Pre-list report has Returned to RPM. This popular feature has been re-introduced due to popular demand and the feedback provided was most welcome.

RPM-9046 Add Function for Users to reverse ceased development

After reviewing Support task trends, we have added a function for Users to Reverse a Ceased Development.

The following steps should be followed to achieve this:

On the Developments main tab, select the All radio button.

Search for Developments, in the Results, the ones highlighted in Red are Ceased.

Once you select a Ceased Development the 'Ceased button' changes to become the 'Reinstate button'.

Clicking the 'Reinstate button' brings up a Confirmation Request box.

Once confirmed the Development is Reinstated along with its respective Client.

RPM-9048 Add Permissions to Binocular Search when Creating Jobs

We have added a New permission called 'JobsTab Elevated' to govern access to the search function when Creating a Job.

A User needs the 'Read' permission to be able to click the binoculars, if they do not have this permission, they can still select from the drop down (this loads a sub set of Contractors based on approved Contractor Rules). Unless a User has the Elevated Permission, they will only be able to choose an Approved Contractor.

RPM-9049 Add Check to Client Web Portal Login for 'Email for Invoices'

When logging in to the Web Portal, we have added a check to see if the User/Client has 'email for invoices' ticked in RPM. If they do not, the portal asks if they would like to Switch to Paperless Billing? This is a once only event.

RPM-9051 Stop Update Sum Insured Closing Insurance Global on Completion

As Requested, we have updated the Sum Insured Process so that upon Clicking the OK button to Acknowledge Completion it No longer closes the Insurance Global Update Sum Insured tab. The Process of Making Multiple updates to the information held on this screen should be a much smoother process for you now.

RPM-9059 User Report to Identify Possible Duplicate PL Payments

RPM will now identify all possible duplicates that link to invoices that have been selected in the Purchase Ledger Payment run. For instance, if a Purchase Ledger Invoice to be paid in this run matches an Invoice that is already paid, RPM's report shows both rows.

In order to see Possible Duplicates:

Select the Purchase ledger.

Enter the relevant fields, enter the Payment Type.

Click 'Get Payments' and the Invoice Table is populated.

Select the possible duplicates tab and the Duplicates are displayed.

RPM-9060 Dashboard - New card 'Overdue Warranty Dates' (other dates)

We have added a new Module to the Dashboard, called 'Overdue Development Warranty Dates'. The Information displayed here can be displayed in multiple ways, depending on the setting chosen.

Option 1: Shows Dates Linked to a Development where the User is the Property Manager.

This results in the screen being split into Two grids: the top displaying All Dates that are Overdue, and the bottom showing the User-subordinate tree view to show how many Overdue Dates there are for the Property Managers Staff.

Option 2: Shows the top grid from the previous setting but shows every single date that is overdue, regardless of who the property manager is. The bottom tree view will not be shown.

Please contact RPM Support, quoting 'RPM-9060' if you would like this setting changed.

RPM-9061 Show All Live Job Alert Warnings on Job Creation

When Creating a New Job RPM now shows All Live Job Alert Warnings for a particular Development / Client / Job. Previously, only the most recent one popped up when Creating a Job.

RPM-9062 Key scanning Mobile App

We have updated the Key Handling module to integrate with the New App. This means you can now scan your Key Barcodes from your phone and sign for them. Please contact RPM Support quoting RPM-9062 for further information.

RPM-9063 Proposed work share user report

We have added a new User Report option called 'Proposed Work Share User Report'

Using this feature of the reports section you will be able to run a report detailing Contractor, Amount, Development and Apportion amongst other details.

RPM-9064 Estimate orders - append asbestos description.

Moving forward, when an Estimate request is raised, RPM will add details from the Asbestos Description field on the Development page to the Estimate request, helping Contractors to ensure their quote is accurate and that they are aware of the relevant safety requirements.

RPM-9066 Add Permissions to Hold Button in Hold File

We have added the Hold and Off Hold Status buttons on the Hold File to Permissions, meaning these buttons will be unavailable unless you have been added to the correct Permissions group.

RPM-9068 Inspection frequency - Store on Job types

We have added an Inspection Frequency option to RPM. This allows you to select anywhere from a day between Inspections to a whole year (365 days) the data for this is pulled from the Warranty Job Type instead of the Development Warranties.

RPM-9133 Unable to resize columns in Clients documents tab

By popular demand, the re-sizing of the Columns in Client's Documents has been reinstated.

RPM-9134 Proposed Works tab - Window displays but is a fixed size - cannot be adjusted

As requested, The Proposed works window is now resizable and the information displayed therein resizes with the Window.

RPM-9146 Log attachment size and add warnings

We have added a new System Setting 'EmailAttachmentSizeLimit' to help govern email attachment sizes in Megabytes.

If you wish to have no limit, the value to enter is 0 (the default). On the add attachment screen, if the total size of attachments is over the specified limit, RPM will warn the user.

Please contact RPM Support, quoting 'RPM-9146' if you would like this setting changed.

RPM-9151 Development Insurance new column

Under the Development Insurance Tab we have added a new column called 'PL Account'. This displays the Purchase Ledger Account Number and the Name of the Account Listed under the Insurance Policy Master screen.

RPM-9155 New Advanced Dashboard Card - Summary Screen

This will be a visual screen to show Visual Representation (graphs) of High-Level Stats.

We have developed a new Dashboard Card called 'Summary Screen'. This new and useful feature adds Graphs of High-Level Stats and can be organised as you wish using a drag and drop method.

RPM-9157 - Management fees

We have updated the Management Fees screen in Client Global Actions. In an attempt to avoid any confusion, the Property range will now only appear when the From and To Development Ranges are set to the same Development.

RPM-9160 New PL Timer pops up on the In-Tray

We have implemented a new pop up on the Purchase Ledger Payments screen. The Prompt reloads your data after 15 minutes.

RPM-9168 Documents not processing to correct document list from Insurance.

From this release and moving forward, Documents to be Sent Out in reference to Insurance Claims will now be saved to the Insurance Claims Documents Tab, rather than just the General Client Documents Tab.

RPM-9173 New System Setting to default search to All instead of Current (for Prop. Works)

We have added a new System Setting to default the search function on the Proposed Works Screen to 'All' instead of 'Current'.

Please contact RPM Support, quoting 'RPM-9173' if you would like this setting changed.

RPM-9174 - Error when opening legacy Jobs in Jobs tab

When accessing a legacy Job on the Jobs Tab, if Next Allocated User is a deleted user, RPM now prompts you to select an Active User.

RPM-9179 Apportionment drop down - show notes

We have expanded the Apportionment drop down menus to include the Notes for the Apportionment. Governed by a new System Setting 'ApportionDropDownShowNotes'.

When enabled, the Apportionment drop downs, specifically those on the Invoice Posting screen and the Proposed Invoice screen, should append the apportionment notes to the end of the Apportionment description. Giving you better clarity as to which Apportionment to use.

Please contact RPM Support, quoting 'RPM-9179' if you would like this setting changed.

RPM-9196 Development insurance - change apportions warning

We have updated the warning message that is given when a change to an apportion may affect any other linked Development insurance record.

This message has been changed so it only shows when the apportion amended is linked to a Development insurance record which is not deleted, a nominal insurance policy and is linked to the current saved apportion.

RPM-9188 new development tick box - AGM

We have added a new tick box on the Development screen for use to signify Developments that hold Annual General Meetings. We have called the Selection 'AGM'. Along with adding the check box we have added the AGM field to the Development Basic User Report view.

RPM-9201 Direct Debit reset Audis button

It is now possible to reset the Audis Submission for this Client's Direct Debit record if you have the correct permissions set. If you don't have the permission the New Audis button does not show nor does the Direct Debit Banking Information.

If you have the correct permission then the New Reset Audis button is displayed, this button re-sets the Audis flag on the Client's Direct Debit Record, which allows the user to submit New Direct Debit details for export via the Client Global screen.

The screenshot shows a web interface for Client Direct Debit details. At the top, there is a 'Telephone Number' field with a mobile phone icon and the number '0'. Below this is a 'Payment Type' dropdown menu set to 'Normal'. A row of checkboxes includes 'Always Print Invoices', 'Exclude Apportion Fees', 'Exclude Management Fees', 'Exclude Annual Calculations', and 'Resident's Association'. Another row includes 'Opt Out Paperless' and 'Opt In Marketing'. The 'Bank Information' section contains several input fields: 'Bank Name', 'Bank Account Name', 'Sort Code', 'Account Number', and 'Bank Reference'. To the right of these are 'Monthly Collection Amount' (0.00), 'Date of Next Collection' (dropdown), 'Number of Times to Run' (0), 'One off Payment Amount' (0.00), and 'One off Payment Date' (dropdown). A 'Paperless' checkbox and a 'Defer One Off Payment' checkbox are at the bottom left. On the right side, a blue-bordered box contains 'Balance Clearing Payments', 'Normal Monthly Payment', 'Elevated Payment', and 'Switchover Date'. A red box highlights the 'Reset Audis Submission' button in the bottom left area.

This works on the Client Direct Debit details on the Client screen, for Users to be able to access and view the Bank Information, they need their Permissions updated to see this button, if they don't have the Permission the button does not show.

RPM-9224 Reverse Development Warranty Date link via In-Tray.

In the Warranties/Maintenance tab, we have added a Reverse function via a Right-click which enables Users to correct their mistakes. As well as the Export Option there is now an option "**Reverse In-Tray Link**".