

Release Notes

RPM – Version 2.53

This document contains a list of new functionality available in the 2.53 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-8809 Addition of a Reverse Float Repayment Button when Deleting Sales

Previously when a Sale needed to be deleted but the Float had already been refunded, multiple steps were needed to be made to rebalance the Clients Float separately to the Reversal of the Sale. This can be fairly complex to understand and time consuming.

We have added a "Reverse Float Repayment", that allows RPM to process the financial side of the Float Deletion/Reversal at the same time as it processes the actual Sale Deletion.

By selecting this Reverse Float Repayment Button before Deleting the Sale, RPM processes the Reverse Float Re-payment and then posts the Float Amendment.

You will still need to exclude the files but this simplifies matters when having to do a lot of Reversals at once.

Client – Global - Sales – Sale Type – Sale Deletion

The screenshot shows the 'Client Global Actions' window. The 'Client Sale Amendment/Deletion' section is active, with 'Sale Type' set to 'Sale Deletion'. Below this, there are fields for 'Development' (set to '-SELECT-'), 'Property', and a 'Find Sale' button. The main area contains fields for 'Client Account', 'Exit Date', 'Seller (Previous)', 'Buyer (Current)', and 'Sale Date'. At the bottom, there are two buttons: 'Reverse Float Repayment' (highlighted with a red box) and 'Delete Sale'.

The new Reverse Float Repayment Button is initially disabled. It is only enabled when you click the "Find Sale button" and the Seller has a Refunded Float which has not already been Reversed, otherwise it remains disabled.

RPM-9407 PL Purchase Posting and Apportionment - Get new Batch No. when changing posting targets

Currently you can make multiple invoice postings to RPM for a specific batch. The batch remains the same until you change the Posting Type or you close and reopen the Posting screen.

This causes an issue when the user changes the 'Post To' target (Holdfile, Charge File, etc) and then Posts a new Invoice for a Transaction Date as RPM keeps posting to the same Batch. The result is a Nominal Batch which spans over several days but never sums to zero on a specific day.

We have applied a solution for this, when the user changes the 'Post To' target, a New Batch Number is applied automatically.

RPM-9412 System Params Journal Types - allow up to 6 chars for Journal Code

As requested, we have added the ability to add a 6 character Journal Code.

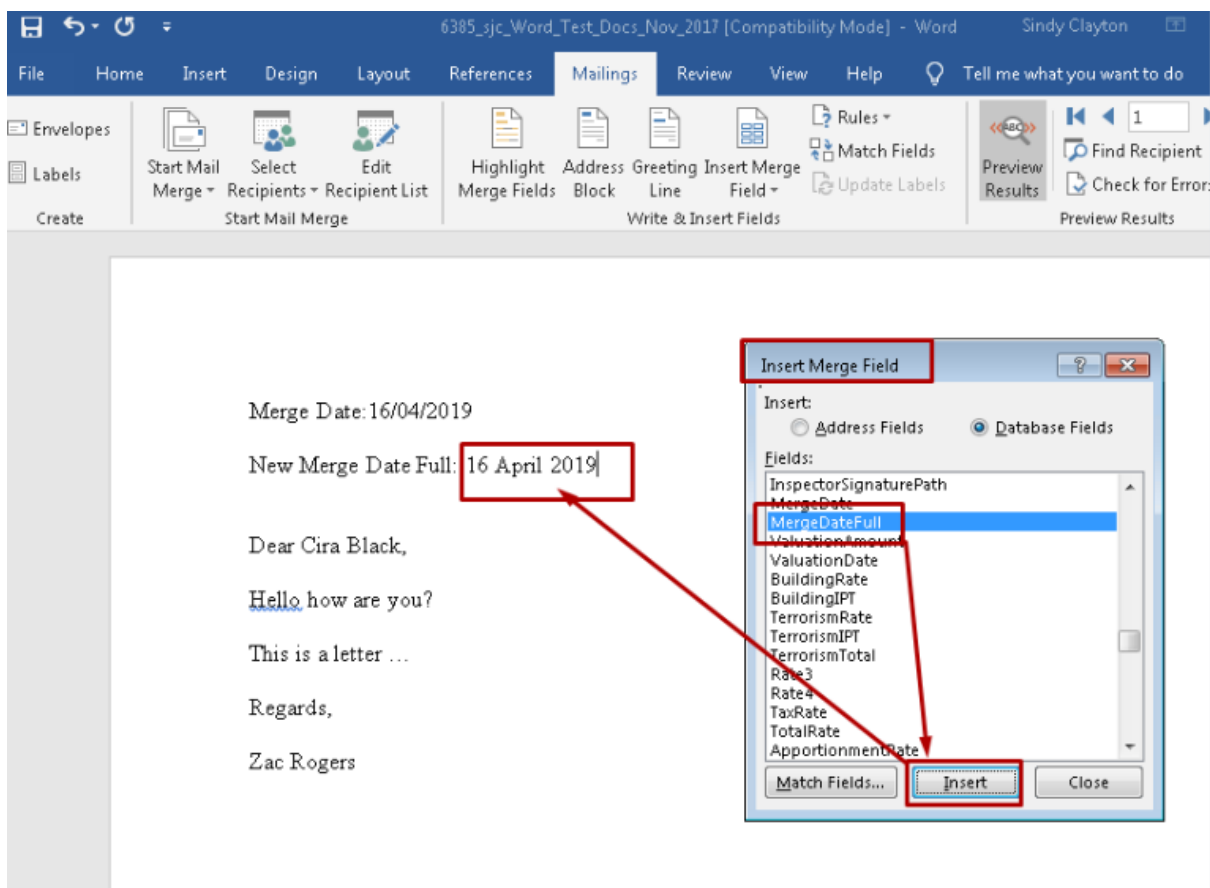
RPM-9448 UVW_MMPLdetails new merge field 'MergeDateFull'

Currently there is a full date field on the Client View for Mail Merges (uvw_MMClientDetails)

The full date field returns the date in the format Day-writtenmonth-Year. (e.g. 03 August 2018)

We have added the same merge field to the PL Account Mail Merge view (uvw_MMPLdetails).

However, as there is already a "Merge Date" field in PL Details which results in only numbers (03-03-2018) we have decided to name this new full date mail merge field 'MergeDateFull'.



RPM-9457 In-Tray - Check for overlong filenames

Windows has a maximum file path length of 260 characters for the full path and filename.

It has been known for long In-Tray filenames to exceed this.

We have now made a modification to restrict filenames to approx. 245 characters. If the new path and filename exceed this the filename needs to be shortened, this is now automatically Truncated.

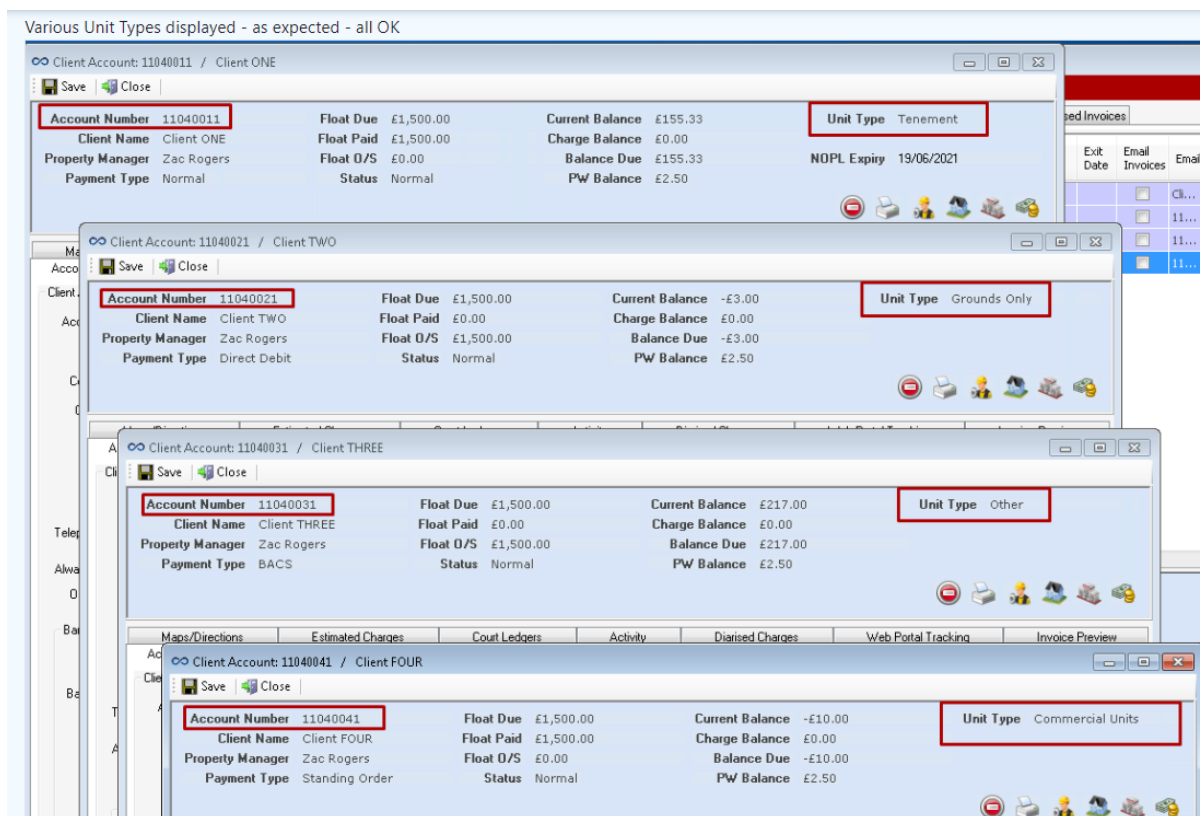
RPM-9473 Tool to convert .doc templates to .docx templates.

Due to ongoing changes to the windows environment, We are removing support for .doc templates in the Mail Merge System. To Help with the change, we have created a tool that will convert the current templates from .doc to .docx

When a user opens the document distribute page the system checks if there are any .doc templates and then prompts the user that they must update them. Once completed you still generate the documents from the same templates and path but the .doc documents will now be .docx

RPM-9475 Add Unit Type to Client Pin panel

As Part of an ongoing review of the Clients Pin Panel due to space constraints, we have added a new Unit Type label which displays the Client Unit Type for the Account. We have also increased the Width of the Panel in an effort to display information in a clearer manner.



RPM-9480 Change to Client Balance report

As Requested, we have renamed the Current 'Float' Column to 'Float O/S' and the 'PW' column to 'PW O/S'. Added new columns 'Float Paid' and 'PW Paid'.

The 'Float Paid' shows just the Float that has been paid (not the outstanding total) and the 'PW Paid' column shows just the Proposed Work payments (not the outstanding total).

OO Reports: Client Balance Report

Filter Options

From Development: 1101 Test World

To Development: 1102 Test 2 World

Credit Control Status: -SELECT-

Payment Type: -SELECT-

To Date: 30/04/2019

Exclude Zero Balance: ☐

Exclude Archived Clients: ☐

Exclude Credit Balances: -SELECT-

Inspector: -SELECT-

Client Account Type: -SELECT-

* Required Fields

Apply Filter

CPL Property Factoring

01 May 2019 17:20

Client Balance Report
(Filter Options:)

Development: 1101

Client #	Client Name	Entry	Exit	Balance	Charge	Float O/S	Float Paid	PW O/S	PW Paid	Dispute	Status	Development Name	Property Manager
1101001	Mervan Adams	30/10/2017		49,892.00	1,497.40	-12.00	212.00	4,901.20	1,313.04		Global	Test World	Zac Rogers
1101002	Noel & Noleen Brown	30/10/2017		-539.70	1,649.40	0.00	10.00	4,852.24	1,362.00		Dispute	Test World	Zac Rogers
1101003	Jon Curry	30/10/2017		10.00	2,960.60	-10.00	40.00	66.67	6,147.57		Hold	Test World	Zac Rogers
1101031	Graham Green-Exited	01/05/2017	24/11/2017	0.00	0.00	0.00	0.00	170.00	0.00		Normal	Test World	Zac Rogers
1101111	David Dume	30/10/2017		75,762.40	1,443.60	-20.00	220.00	5,323.92	1,121.40		2nd	Test World	Zac Rogers
1101221	Eric Evans	30/10/2017		4,562,460.6	1,634.60	0.00	200.00	4,059.20	1,738.80		Reminder	Test World	Zac Rogers
1101331	Sam Collins-Exited	30/10/2017	01/11/2017	-540,714.07	0.00	0.00	0.00	0.00	0.00		Normal	Test World	Zac Rogers
1101341	REDACTED	01/01/2018	01/06/2018	0.00	0.00	0.00	0.00	0.00	0.00		Global	Test World	Zac Rogers
1101342	Bo Peep	01/06/2018		-132.00	160.80	0.00	10.00	0.00	0.00		Dispute	Test World	Zac Rogers
	Development Total £:			4,978,182.0	4	9,346.40	-42.00	692.00	19,373.23	11,682.81			

Development: 1102

Client #	Client Name	Entry	Exit	Balance	Charge	Float O/S	Float Paid	PW O/S	PW Paid	Dispute	Status	Development Name	Property Manager
1102011	Kevin O'Kall	30/10/2017		68,119.89	3,276.52	-20.00	470.00	12.52	0.00		3rd	Test 2 World	Zac Rogers
1102021	Lex Luther Sold	30/10/2017	22/03/2018	-2,078.37	450.00	0.00	0.00	0.00	0.00		Reminder	Test 2 World	Zac Rogers
1102022	Louis Luther	22/03/2018		-543.34	769.81	0.00	450.00	18.03	0.00		Dispute	Test 2 World	Zac Rogers
1102023	buyer one	01/05/2019	01/05/2019	0.00	0.00	0.00	0.00	0.00	0.00		Normal	Test 2 World	Zac Rogers
1102031	Clark Kent	01/02/2018		2,206.33	1,927.31	-120.00	570.00	24.94	0.00		Hold	Test 2 World	Zac Rogers
1102041	Ora Blackie	01/01/2018		3,905.09	2,409.96	0.00	450.00	30.05	0.00		Hold	Test 2 World	Zac Rogers
1102042	Shirley White	29/05/2018	29/05/2018	0.00	0.00	0.00	0.00	0.00	0.00		Normal	Test 2 World	Zac Rogers
1102051	Scary Mary	01/02/2018		-71.52	2,909.81	-10.00	460.00	35.06	1.00		3rd	Test 2 World	Zac Rogers
	Development Total £:			71,538.08	11,743.41	-150.00	2400.00	119.20	1.00		Reminder	Test 2 World	Zac Rogers

RPM-9486 Add 'Posted By' to Nominal Transactions Screen

In order to better track nominal entries, we have added a new column 'Posted By' to the Nominal Transaction grid to show the User who made the Nominal Posting.

Transactions for Nominal Code: 1006 / VAT on Repairs

Close

Nominal Transaction

01 January 1990 -> 16 April 2019

Search

Trans Date	Batch No	Batch Type	Daybook No	Reference	Account No	Account Name	Posted by	Nominal Post Description
14/03/2019	6370	1 - Purchase Invoice		Post to Holdfile			Administrator	This is a test for RPM-9541 - In-Tray Post Propos
12/02/2019	6354	5 - Hold To Charge File Update		Post to Hold to Chargefile			Administrator	sic test1
12/02/2019	6352	1 - Purchase Invoice		Post to Holdfile			Administrator	qwerty
11/02/2019	6348	1 - Purchase Invoice		Post to Holdfile			Administrator	This is another test for 9419
31/01/2019	6343	1 - Purchase Invoice		Post to Holdfile			Administrator	Test Prop. Invoice in use
15/01/2019	6335	13 - Diarised Charges		Post to Holdfile			Administrator	JC Qtrly Charge - Clear gutters
15/01/2019	6325	13 - Diarised Charges		Post to Holdfile			Administrator	Test diarised Charge for Dev 279
14/01/2019	6309	13 - Diarised Charges		Post to Holdfile			Administrator	Stairwell Window Cleaning
11/01/2019	6284	13 - Diarised Charges		Post to Holdfile			Administrator	JackTestDC02
11/01/2019	6283	13 - Diarised Charges		Post to Holdfile			Administrator	JackTestDC02
11/01/2019	6281	13 - Diarised Charges		Post to Holdfile			Administrator	JackTestDC02
11/01/2019	6271	13 - Diarised Charges		Post to Holdfile			Administrator	Grounds Maintenance
11/01/2019	6261	13 - Diarised Charges		Post to Holdfile			Administrator	Test DC Stair Lighting
22/11/2018	6235	1 - Purchase Invoice		Post to Holdfile			Administrator	Second dup test
22/11/2018	6234	1 - Purchase Invoice		Post to Holdfile			Administrator	Test
16/11/2018	6227	1 - Purchase Invoice		Post to Holdfile			Administrator	This is a CDM test
16/11/2018	6226	1 - Purchase Invoice		Post to Holdfile			Administrator	testr asdfadsf Prop Inv
12/09/2018	6139	1 - Purchase Invoice		Post to Holdfile			Administrator	Pete - testChange the Contractor from Handy_sic
04/09/2018	6109	1 - Purchase Invoice		Post to Holdfile			Sindy	flying debris smashed window Posted first
03/09/2018	6108	1 - Purchase Invoice		Post to Holdfile			Sindy	none Invoice post twice test but this is the first
03/09/2018	6105	1 - Purchase Invoice		Post to Holdfile			Sindy	asdfghi

RPM-9518 Email / SMS - New system setting to streamline process

As part of streamlining the email process for sending single emails, we have created a new System Setting called 'EmailSMSWizardMode'

The settings are:

- 1 - Start at Stage 1
- 2 - Jump to Stage 6 (Subject and Body input)

When Option 2 is chosen, the email will use the default email address and default options selected for cc/bcc and signature.

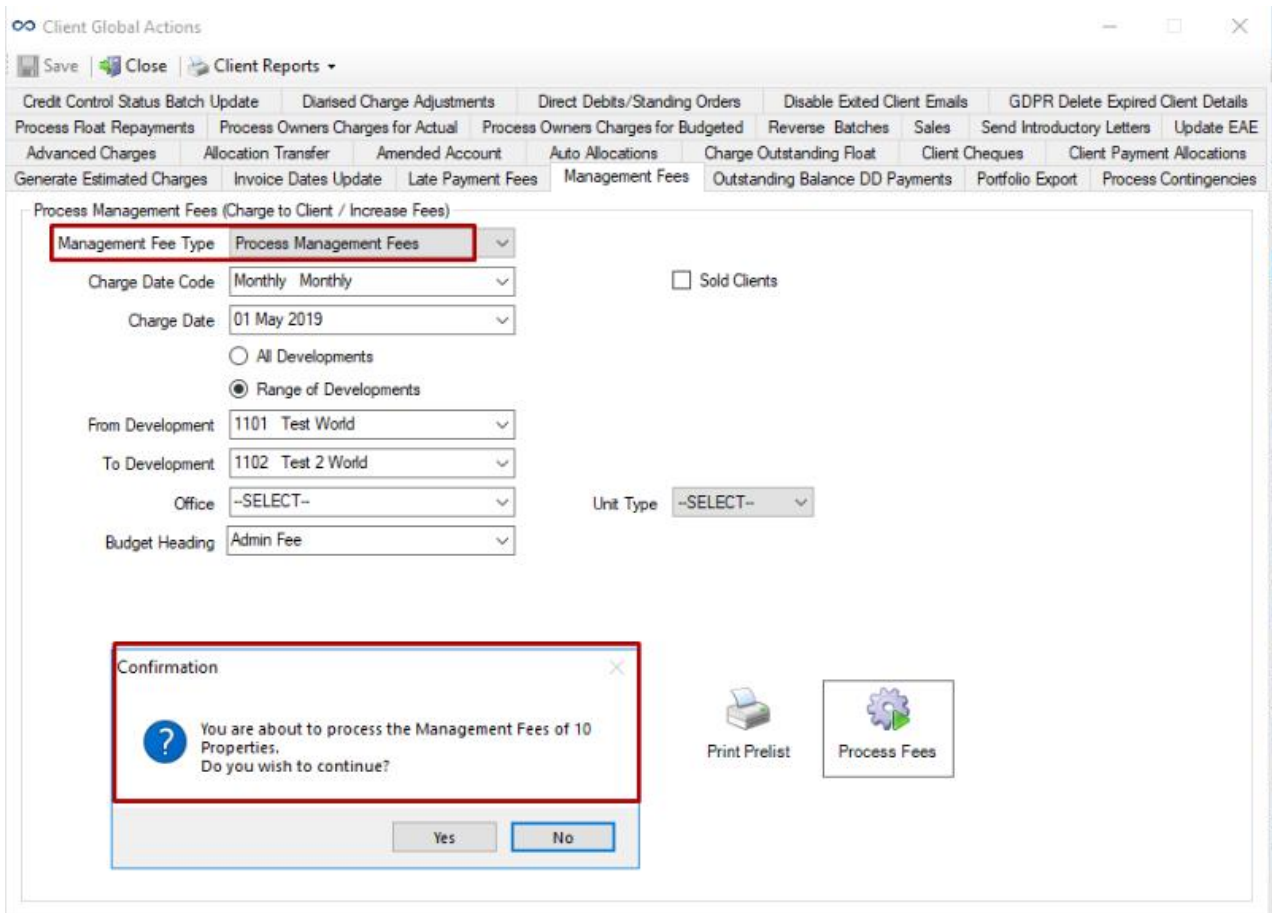
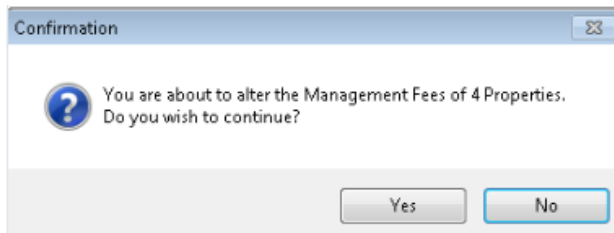
RPM-9533 Hold file master grid - add new columns

To help track changes to Hold Files, we have added three new columns to the Hold File Grid Original Total, Original Goods and Original VAT. Now you will be able to see the values prior to any changes made alongside their current values.

Development	Clients	Purchase Ledger	Jobs Maintenance	Insurance	Hold File	Nominal	Custom Desktop	Proposed Works	Estimates	Court Ledger	Proposed Invoices			
DBN	Transaction Date	Original Goods	Original VAT	Original Total	PL Acct/Journal	Status	Description	Charge To		Goods Amount	VAT Amount	Total Amount	Released	Invoice Due Date
480912	11/01/2019	100.00	5.00	105.00	Cleaning Company 1 ...	Normal	Rubbish Collection Rubbish U...	1 Block A		100.00	5.00	105.00	<input type="checkbox"/>	01/01/...
480808	11/01/2019	177.50	0.00	177.50	Gas Company 53 G...	Normal	Grounds Maintenance	1 all properties		177.50	0.00	177.50	<input type="checkbox"/>	01/01/...
480851	11/01/2019	68.00	0.00	68.00	Gas Company 53 G...	Normal	Grounds Maintenance	1 All properties		68.00	0.00	68.00	<input type="checkbox"/>	01/01/...

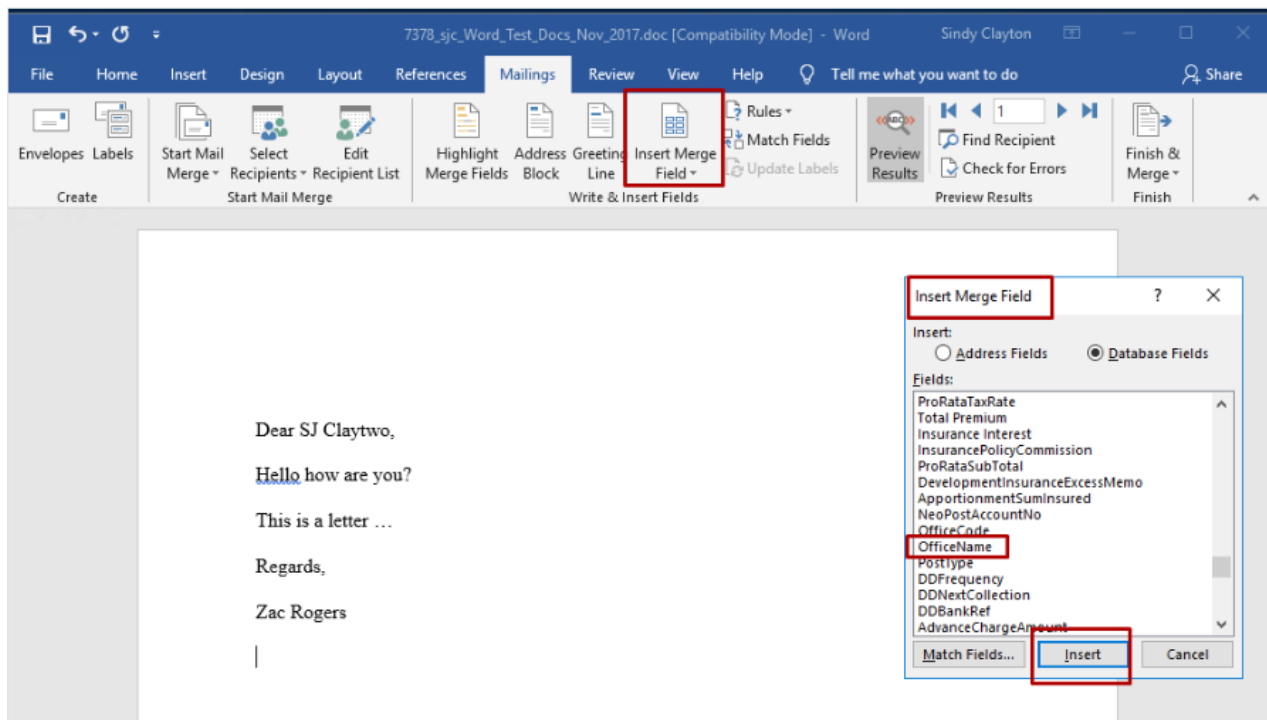
RPM-9546 Management fee increase - confirmation message

RPM now shows the total number of properties to be updated when there is a Management Fee Increase, this is shown in the confirmation message "You are about to update 4 properties".



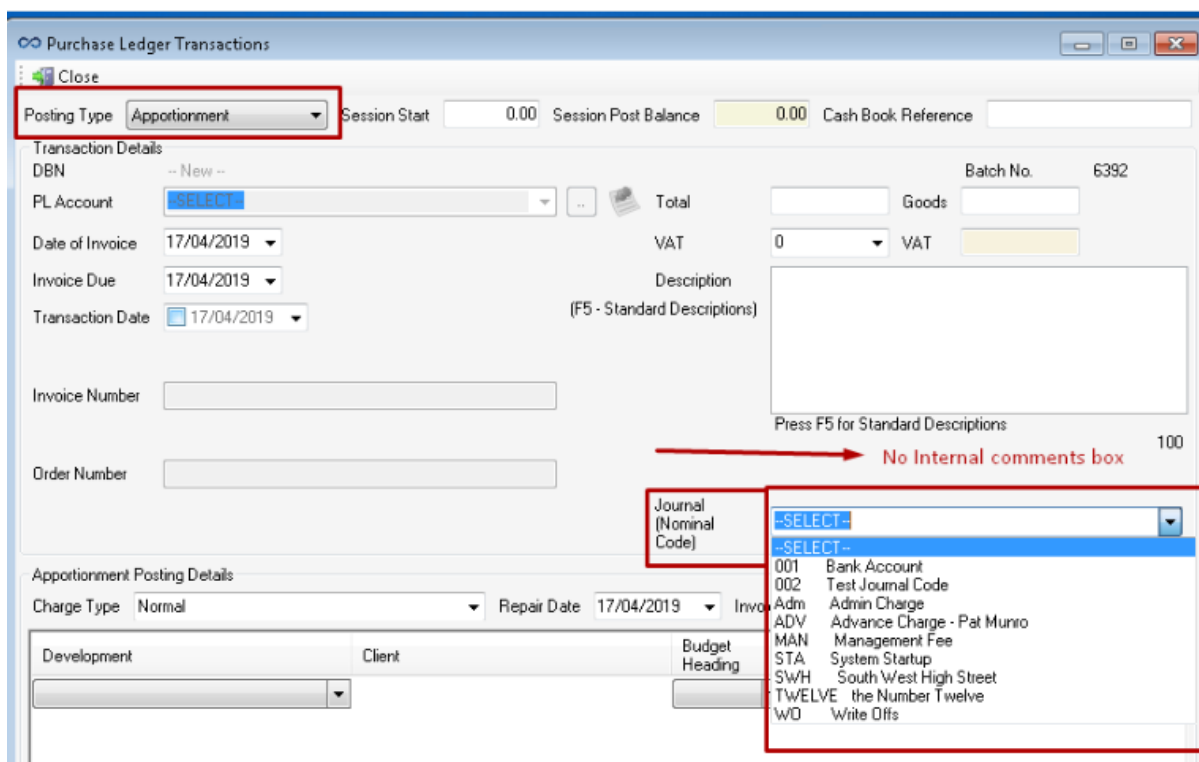
RPM-9547 Client details new mail merge field - OfficeName

As Requested, we have added the 'OfficeName' merge field to the Client Mail Merge fields.



RPM-9551 PL Posting screen - Internal Comments box - hide when Posting Type is Apportionment Posting

We have hidden the internal comments box when making a Apportionment Posting as they are irrelevant to the task at hand.



RPM-9601 Development Balance Reconciliation

RPM now shows all of the balances that affect the Development Balances, the balances listed are:

PL Owed

Hold File

Charge File

Invoiced to clients

Payments and Amendments

Grand Total

you can then use the Grand Total to compare against the Bank Balance, to make keeping track and understanding your balances easier.

RPM-9611 Budget Rewrite

This redesign is to improve the user's experience and workflow while Creating, Editing and Invoicing Budgets as well as streamlining the data and back end processes to prevent issues when developing and supporting the software in future.

As this is a significant change to the system, we have included a Help file, which is accessed from the new Budget Editor screen.

Schedule ID	Name	Apportionment
68	Dev 0012 Year 2 Schedule 1	Block 1
69	Dev 0012 Year 2 Schedule 2	Block 2
70	Dev 0012 Year 2 Schedule 3	Everyone!

Item ID	Budget Header Name	Amount
162	Lift Maintenance	80.00
163	Window Cleaning edited	120.00
164	BUDGET 1	10.00
165	Garage Cleaning	40.00

Please read the Help to familiarise yourself with the new system, before making any Budget changes.

Your old Budget data will be automatically converted to use the new system with this update.

Updates to 2.52

RPM-9600 - Inspections widget in custom desktop

The Inspections Widget in the Custom Desktop is finding the inspection dates of deleted inspections and taking them into account when working out whether a Development is due an inspection.

The widget now excludes deleted inspections.

RPM-9593 - Unable to run a Client Statement report on ceased developments.

Previously, the filter for the Client Statement Report did not allow ceased developments. We have now included a selection box that will include ceased developments in the dropdown list, if ticked.

RPM-9589 System setting Client Notice Type (ID 4432) needs a Third option in regards to printing on Client Notices.

In a Previous version we introduced a setting that controls the print options on Client Notices Due to a high number of tickets being raised due to a miss selection by clients. Some of you however use all the print options as such we have introduced a third option to the setting making all print options available. As such you can once again use all the print buttons as they use the custom report file for first reminder, a mail merge for the second reminder and so on if your settings permit.

RPM-9576 & RPM 9889 - Unable to link documents to Ceased Development via the In Tray

Previously when attempting to link a Document (in the Correspondence tray) to a Development that is Ceased, Users were getting the error "Development not found"

We have now resolved this issue and the User can process Correspondence for a ceased development.