



Property Manager

Enhancements – Version 1.41

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Installation Instructions

Windows 7 and Windows 8 Operating Systems only

- Microsoft withdrew support for the Windows XP operating system in April 2014. If you still use Windows XP we strongly advise that you contact us BEFORE loading this version of the program.
- Before you start, ensure that you have made an up-to-date backup of your Property Manager data.
- You will not be able to load this version of the program if your licence has expired. If you are getting messages telling you that your licence has expired but you have renewed your contract, take the option **File – Licence – Get Key** BEFORE you load this version of the program.
- The option to install the latest version of the program can be found under **Property Manager** in the Support area of the Farmplan website (www.farmplan.co.uk). You will need your email address and customer number.
- Make sure that the Property Manager program is closed.
- Follow the on-screen instructions to '**Download Program Now**'. The exact procedure will vary according to the version of Windows and browser that you use but just follow the instructions on the screen. You will download a file called **setup.exe**, supplied by Reed Business Information (our parent company), which should then be 'Run'.
- If Windows SmartScreen (a warning message) appears to block the installation, click on **More Information** and then **Run Anyway**.
- A black box will appear on your screen during the installation. Ignore it – it will disappear when the installation is complete
- When the installation is complete go into the program – your data will be automatically updated to run with the new version (1.41) of the program.

If you have any problems installing the program, please read the document available from the **Download** screen by following the link called '**Having Problems Installing?**' for more details.

Property Manager Enhancements

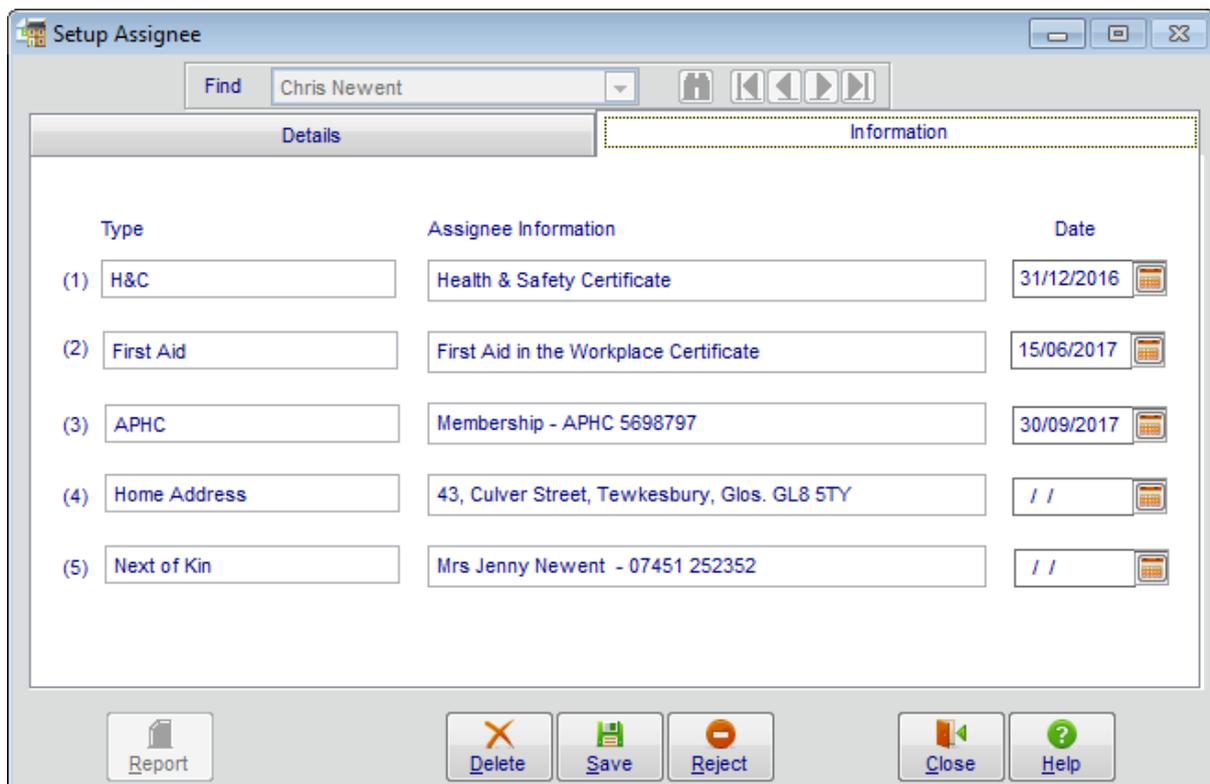
July 2015

Please note that full details of each change to this version of the program can be found in the option **Help – Property Manager – Enhancements – Summer 2015.**

If you would like help or more information about any of the changes in the program, please contact Software Support on 01594 545022.

Assignees – Extra Information

Assignees are individuals who can be allocated Rent Reviews and Tasks. For example they may be an agent who is responsible for negotiating rent increases or a member of staff who carries out particular tasks such as property maintenance.



The screenshot shows the 'Setup Assignee' window for 'Chris Newent'. It features a 'Details' tab and an 'Information' section. The 'Information' section contains a table with the following data:

Type	Assignee Information	Date
(1) H&C	Health & Safety Certificate	31/12/2016
(2) First Aid	First Aid in the Workplace Certificate	15/06/2017
(3) APHC	Membership - APHC 5698797	30/09/2017
(4) Home Address	43, Culver Street, Tewkesbury, Glos. GL8 5TY	//
(5) Next of Kin	Mrs Jenny Newent - 07451 252352	//

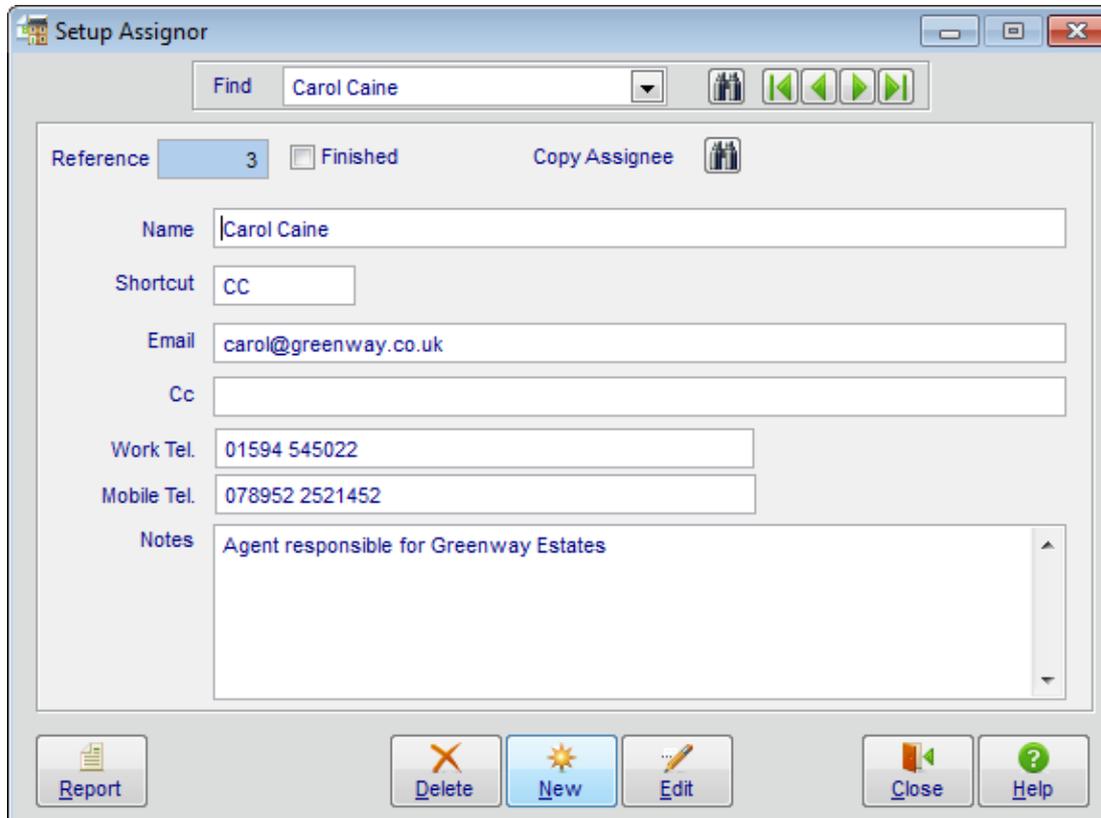
At the bottom of the window, there are buttons for 'Report', 'Delete', 'Save', 'Reject', 'Close', and 'Help'.

In addition to their existing details (name, email), it is now possible to record their telephone numbers and additional information such as training and certificate details in **Setup – Assignees**.

These new fields can also be added to assignee reports within the **Report Library**. NB Each field can be report on individually but there is also a field called **All Information** which combines all of the Assignee Information, separated by commas, into one column for reporting purposes.

Assignors

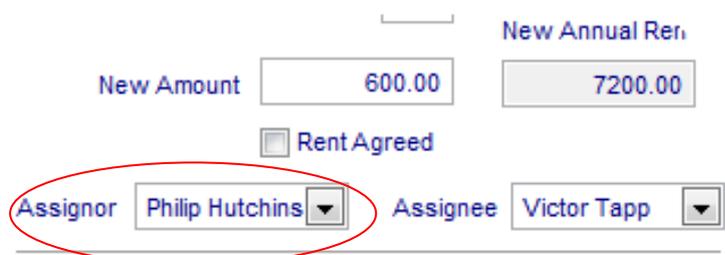
In addition to assignees, it is also possible to now allocate an Assignor – i.e. the person who is managing the task or rent review. This will allow you to filter the Events Screen by Assignor and produce reports.



In some circumstances assignors of particular tasks may also be responsible for carrying out tasks as well i.e. they are also assignees. If this is the case you can save time by copying the contact details of an existing assignee.

The first assignor in the list is already set up for you as 'Unassigned' and will be the default for all existing tasks unless you change it.

Assignors can be added to Rent Reviews:



and Tasks:

The screenshot shows a task form with the following fields and values:

- Cost:** 75.00, VAT: 15.00, Standard (dropdown)
- Nominal:** General (ME) (dropdown)
- Assignor:** Jill Smith (dropdown, circled in red)
- Assignee:** Chris Newent (dropdown)
- Buttons:** Notify Assignee

The **Events Manager** screen will allow you to filter tasks and reviews by Assignor:

The screenshot shows the 'Property Manager Events' interface. It includes a date range selector (15/06/2016), filter options for Landlords, Estates, Properties, and Tenancies, and dropdowns for Assignor and Assignee. A dropdown menu for 'All Assignors' is open, showing Carol Caine, Jill Smith, and Unassigned. Below the filters is a table of events:

Event	Task Ref	Allocation	Description	Due Date	Completed	Task Type	Assignor	Assignee
Rent Reviews (14)	ABC 123457	Court Lodge Cottages	Inspect And Service Boiler	5/7/2014		Boiler Service/ins...	Jill Smith	Chris Newent
Registered Rent (1)	ABC 123456	2 Acacia Way	Fit New Bathroom	30/6/2014		Property Mainten...	Jill Smith	Ed Wilson

The Assignor is also shown against each review and task which can be sorted by clicking on the Assignor column heading.

The Assignor will be displayed on any appropriate report from the **Events Manager** screen.

Assignor details are also available for inclusion on any relevant reports created in the **Report Library**.



DID YOU KNOW That the reports from the Events Manager screen are all customisable and the layout can be edited to suit your own requirements. For example you may simply wish to widen or remove a column, or produce a completely different layout such as a job record card for a single task to give to your contractor.

If you would like more details please give our Support Line a ring on 01594 545022.

Tasks

A number of changes have been made to the **Tasks** option to enhance the way that scheduled tasks and jobs are recorded and appropriate staff (assignees) notified:

Reference – each task can now be allocated a user defined job reference.

Repeat on Completion – tasks can now be repeated, once they are complete, based on the 'completed date' rather than the 'due date'.

The screenshot shows a software window titled 'General Tasks - Copy tasks OFF' with a sub-header 'Repeat tasks from Completed date'. The interface includes several input fields and controls:

- Navigation buttons: back, forward, and search.
- Property selection: 'Set the Landlord / Estate' (Marriage Settlement 1963, Froxfield Estate) and 'Set the Property / Tenancy' (Court Lodge Cottages, No Tenancy).
- Task details: Reference (WAS53733-sa), Description (Inspect and Service Boiler), Type (Boiler Service/inspection), Notified (01/02/2015), Due Date (05/07/2015), Completed (//), and a checked 'Prompt Repeat On Completion' option with a 'Period Increment' of 12 Months.
- Notes: 'To be carried out by Watsons. Remind them to collect key from estate office'.
- Cost: 75.00, VAT: 15.00, Standard.
- Nominal: General (ME), Assignor: Jill Smith, Assignee: Chris Newent.
- Buttons: 'Notify Assignee' and 'Notified'.
- Footer: Report, Delete, New, Edit, Close, Help.

Assignor – record who created the task as well as who it was assigned to.

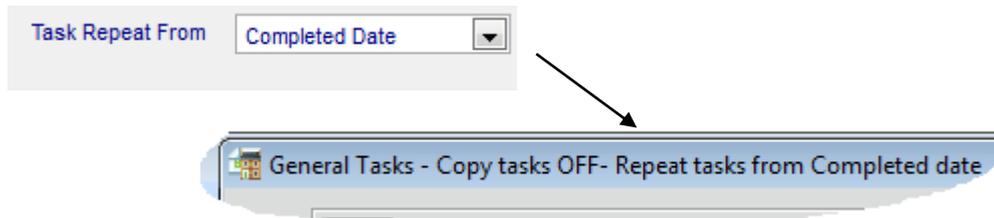
Notify Assignee – send the assignee an email and, if appropriate, automatically create a task in Outlook.

- **Reference** - each task can now be allocated a user defined job reference which can be alpha and/or numeric. This reference will be displayed against each task on the Events screen. Sort the list by clicking on the column heading.

Allocation	Task Ref	Description	Due Date	Completed	Task Type	Assignor	Assignee
15 Prospect Terrace	Sept - CN - 1	Gas Inspection	30/9/2014		Electricity/Gas Ins...	Lucy Jordon	Chris Newent
2 Acacia Way	June - Ed - 1	Fit New Bathroom	30/6/2014		Property Mainten...	Unassigned	Ed Wilson
2 Acacia Way - Bandali	June - Ed - 2	Read Meter	1/6/2014		Electricity/Gas Ins...	Unassigned	Ed Wilson

- **Repeat on Completion** – a new task can now be created with a 'due date' based on the completion date of the existing task rather than its original due date. For example you may wish an annual inspection to take place 12 months after the last one was done, rather than when it was due to happen.

Change this within behaviour within **Tools – Options** which will then be reflected at the top of this screen.



- **Assignor** – Record the person who has generated this task by allocating it to an 'Assignor'. Assignors can be created in **Setup – Assignor** where you can enter their details. If applicable, their details can be copied from an existing assignee using the 'Copy Assignee' button.

The 'Setup Assignor' window displays the following information:

- Find: Jill Smith
- Reference: 4
- Finished:
- Copy Assignee:
- Name: Victor Tapp
- Shortcut: VT
- Email: vic@froxford.co.uk
- Cc:
- Work Tel: 01594 545022
- Mobile Tel: 077893 258258
- Notes: Agent at Froxford.

Buttons at the bottom: Report, Delete, Save, Reject, Close, Help.

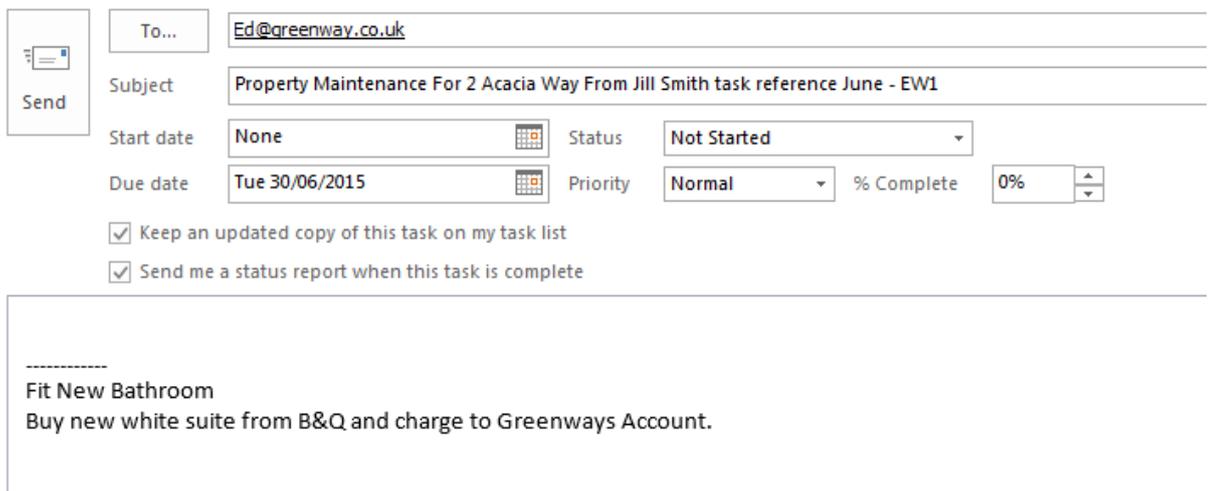
- **Notify Assignee** – once a task has been created and allocated to an assignee, they can be notified by sending them an email which can also be saved as a task in Outlook, if applicable.

The email will be sent from the default address on the current computer and can, optionally, be added to the sender's task list as well if Outlook is in use.

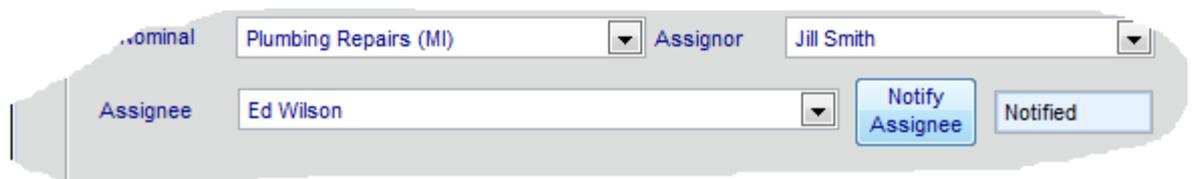
Remember to give each assignee an email address in **Setup - Assignees**.

When the task has been saved click on the '**Notify Assignee**' button.

This will open up an email that can be viewed, and if necessary, amended before it is sent:



A 'Notified' box will appear against this task in Property Manager.



TIP - Outlook does not let you email tasks to yourself (if you are also an assignee), however you can just save the unsent email and it will appear in your tasks list.



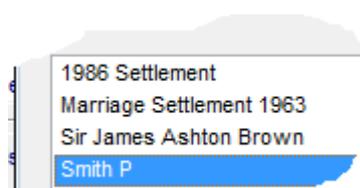
DID YOU KNOW ... If you are entering several similar tasks at once, you can use the speed up the process by automatically copying the main details. Set **Tools – Options** to 'Copy Tasks'. Open an existing task that you wish to duplicate and click on 'New' to replicate the main details on the new task.

Landlord/Estate – Short and Full Name

Additional fields have been added to the Landlord and Estate screens to allow the use of a short name for alphabetical listings and a full name for use on official documents such as Demands.

Name	Smith P
Full Name	Mr and Mrs Smith

Short Name for use in alphabetical listings:



1986 Settlement
Marriage Settlement 1963
Sir James Ashton Brown
Smith P

Full Name for use on Rent Demands:

We hereby request the payment of rent or charges set out hereunder on behalf of :

Mr and Mrs Smith

Report Expressions for adding to reports using the Report Designer:

Short Name	Landlord.name	Estate.name
Full Name	Landlord.clsname	Estate.clsname

NB The existing name will be duplicated in both boxes as part of the update to allow you to choose how they are treated.

Landlord/Estate Commission

If you are running the Property Manager program on behalf of a client you can enter a commission % at the top level of hierarchy so that it can be used on reports.

You may wish to use it in a report generated in the **Report Library** to calculate the commission that you are due based on the rent demanded – multiply the 2 expressions using a * and divide (/) by 100.

Alternatively it can be added to the Tenancy report using the Report Designer:

Commission %	Landlord.nlcomms	Estate.necomms
---------------------	------------------	----------------

Landlord/Estate/Agent – Bank Details

The bank details of the payee can now be entered against their record so that they can be included on appropriate reports such as the rent demand, tenancy reports and within the Report Library.

The bank details can be added using the option **Entries – Landlord** or **Entries –Estate**. Alternatively if all receipts are paid into a central account, perhaps collected by an Agent, use **Setup – Business Details**.

To customise the rent demand, invoice or tenancy report use the expressions:

Account Name	Landlord.cbanknme	Estate.cbanknme	General.cbanknme
Account No.	Landlord.cbaccno	Estate.cbaccno	General.cbaccno
Sort Code	Landlord.cbsrtcde	Estate.cbsrtcde	General.cbsrtcde

Tenants – Copy Property Address

The address of a tenant can now be automatically populated by copying the address of the property that they will be occupying.

Use the binoculars to find the relevant property. When it has been selected it will complete the tenant's address and invoice address which may be amended as required.

Tenants – Additional Tenant Details

The 'Invoice Name' box on the **Details** screen has been extended to allow you to include the name of multiple tenants if you wish.

One tenant should be nominated as the 'lead' tenant and will be the one that appears in the initial **Details** screen.

Up to 4 additional contact details can now be entered against each tenant record for use when more than one person occupies a property.

The contact details of any other tenants can be added in the **Additional Tenant Details**.

Find Hutchins, Mr P

Details Additional Tenant Details Notes

Joint Tenant Details 2

Name Kim Hamilton
email kim@smiths.co.uk
Home Tel. 01594 123585
Work Tel. 01989 568253
Mobile Tel. 078524 652365

Joint Tenant Details 3

Name
email
Home Tel.
Work Tel.
Mobile Tel.

Joint Tenant Details 4

Name
email
Home Tel.
Work Tel.
Mobile Tel.

Joint Tenant Details 5

Name
email
Home Tel.
Work Tel.
Mobile Tel.

Report Delete Save Reject Close Help

Tenants - Multiple Email Addresses

If you want to email rent demands to more than one person make sure that each email address in the **Tenant** option is entered in the email box on the **Details** screen, separated by a ;

For example: phil@hotmail.com;kim@smiths.co.uk

This is then used in the **Batch Email** option.

Batch Email

Choose a Date Range 01/06/2015 to 16/06/2016

Choose a Landlord / Estate All Landlords All Estates

Choose a Property / Tenancy All Properties All Tenancies

Transaction Types All Transactions

Description	Amount	VAT	Entry Date	Due Date	Invoice Ref	Date Sent	Email Address
15 Prospect Terrace - monthly rent in adv	650.00	0.00	16/06/2015	30/06/2015	674 2913 / /		phil@hotmail.com;kim@smiths.co.uk

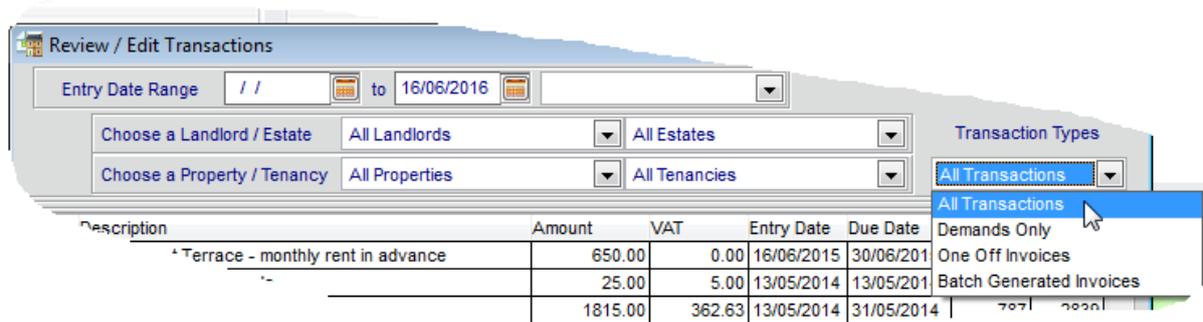
NB Remember to put a tick in 'Email Invoices' on the **Tenancy** screen if you want to email demands to your tenants.

Rent Demand and Sales Invoice Layouts

The layout of sales invoices can now be customised in a different style to the rent demand.

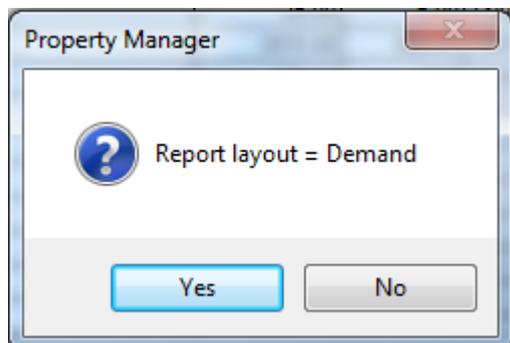
The option to edit the demand or invoice layout is found in the **Financial – Transactions** screen.

Pick the appropriate type from the drop down box at the top of the screen.



One Off Invoices and Batch Generated Invoices use the same layout but the Demands can be customised to a different style.

To edit either layout go to the **Report** button at the bottom of the screen. Select the option to produce a detailed report and you will see a window to confirm the selected layout.



You will be taken the **Report Publisher** screen where you can print, preview, export etc. using the selected layout.

Use the **Edit** button at the bottom of the screen to customise the layout of the report.

The program will use the Demand layout in the **Rent Demand** option and the Invoice layout in **Batch Printing**. The **Transaction** option will ask you to choose as above, as will the **Batch Emailing** option. Selecting 'All Transactions' will assume you want to use the Demand layout.

NB if you already have a customised layout this will have been copied to both the Demands and Invoices as part of the data update.

Additional Items/Sales Invoices – Opening and Closing Quantities

If you are invoicing tenants for metered electricity or water, you can now enter the opening and closing meter reading and the program will calculate the quantity used.

If this is not relevant just leave these boxes empty.

To add these to your Sales Invoices use the expressions:

Opening Quantity	Items.nopqty
Closing Quantity	Items.nclqty

NB The quantity can now be entered to 3 decimal places and the item amount (price) can be entered to 4 decimal places.

If you have an existing customised demand and want to take advantage of the decimal places you will need make a small tweak to your layout – please contact us for more details.

Demands/Property Analysis Report – Exception Key Codes

Any future rent increases and anomalies in the Rent Demands within the date range are now highlighted to give more details rather than just showing a * to give more details of the exception.

Tenancy	Rental Period	Amount	Next Due	Period Start	Period End	Exception Date	New Amount	Demands	Income (Est.)	OK	Print
2 Acacia Way - Bandali - Ba	Monthly, Calendar, Advanc	550.00	01/06/2014	01/06/2014	30/06/2014	E 30/06/2014	600.00	1	550.00	✓	□
No 1 Elm Row - Grant, Mrs	Monthly X 2, In Advance	675.00	01/06/2014	01/06/2014	31/07/2014	06/05/2014	675.00	1	675.00	✓	□
No 2, Elm Row - Beech, Mrs	Monthly, Calendar, Advanc	470.00	01/06/2014	01/06/2014	30/06/2014	/ /	0.00	1	470.00	✓	□
Unit 3 Venture Park - Ventur	Monthly, Calendar, Advanc	495.00	01/06/2014	01/06/2014	30/06/2014	R 30/06/2014	495.00	1	495.00	✓	□
Bluebell Farm House And Pa	Quarterly, Calendar, Arrear	4,865.00	24/06/2014	26/03/2014	24/06/2014	31/07/2014	4815.00	1	4,865.00	✓	□
Coachmans Cottage - Wilson	Quarterly, Calendar, Advan	4,350.00	24/06/2014	24/06/2014	28/09/2014	E 01/07/2014	4200.00	1	4,350.00	✓	□
Bluebell Wood - Cartwright,	Quarterly, Calendar, Arrear	1,487.50	25/06/2014	26/03/2014	25/06/2014	/ /	0.00	1	1,487.50	✓	□
Farmplan Computers Ltd - U	Monthly, Calendar, Arrears	1,800.00	30/06/2014	01/06/2014	30/06/2014	15/07/2013	2000.00	1	1,800.00	✓	□
Littlewood Cottage/Bandali -	Monthly, Calendar, Arrears	1,000.00	30/06/2014	01/06/2014	30/06/2014	/ /	1000.00	1	1,000.00	✓	□
Tibberton Playgroup Play Ar	Annual, Calendar, Arrears	0.05	30/06/2014	01/07/2013	30/06/2014	/ /	0.00	1	0.05	✓	□
Walkers Farm - North - Eckle	Quarterly, Calendar, Arrear	15,000.00	30/06/2014	26/03/2014	10/06/2014	X 10/06/2014	0.00	1	15,000.00	✓	□

B = Blocked Date

As before, if the next rent demand is blocked it will not appear in the Rent Demand list but will be included in the 'Exclusions' list which is accessible from the bottom of this screen.

However if the date range at the top of the screen includes future rent demands a B will be displayed against any upcoming block dates. **NB** this is more likely to be applicable in **Property Analysis** option than the **Rent Demands** screen.

E = Effective Date

This tenancy has an effective rent increase date that falls within the selected date range.

If the 'New Amount' will be the same or less than the current rent then it will also be highlighted in red.

R = Review Date

An R denotes that a rent review date falls within the selected date range.

X = Ending/Partial

The rent to be demanded will be apportioned on a pro rata basis because the tenancy is starting or ending part of the way through the current rental period. The rent figure is also shown in red to highlight this.

NB More information about each tenancy can be accessed by clicking on the ?



DID YOU KNOW That the default dates at the top of the Rent Demand screen are based on the earliest due date found and extend to the end of that period.

Do you have old dates appearing here that are masking your real rent demand list? Just drill down on the ? at the start of each line to see the tenancy. Is this an old tenancy that should have finished? Or is there an unresolved query – put in a block date and it will be removed from the filter.

Exclusions

This button, at the bottom of the Demands screen, was previously labelled 'Demand Exceptions'. This shows a list of all tenancies who are being excluded from the current demand period – either because:

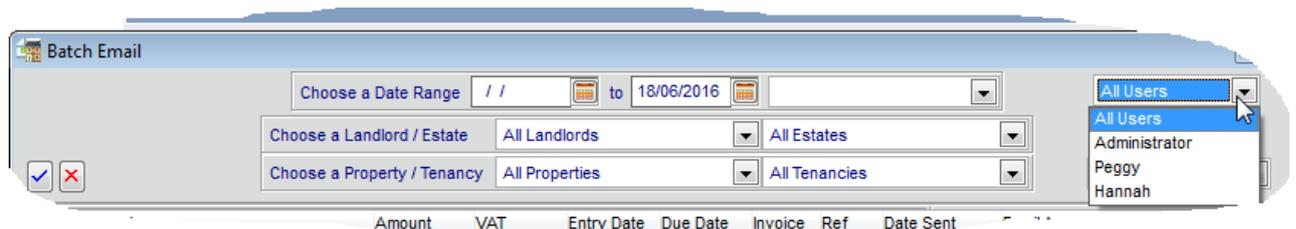
- There is a 'Block Date' that means that this tenancy is temporarily on hold for some reason.
- The 'Due Date' does not make sense to the program based on the start/end date of the tenancy i.e. it falls on a date when the tenancy was not active.

We recommend that this list is always checked before you run your Demands to ensure that nothing is missed.

Batch Emailing Screen – Filter by User

'Users' can be set up to filter various areas of the program – for example if one operator has responsibility for a particular group of properties/tenancies.

If they have been enabled it is now possible to filter the **Batch Emailing** screen by User.

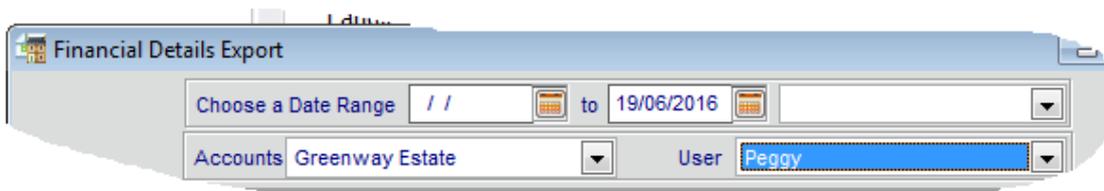


NB the 'sent' email address will be the default one on the machine that you are using.

Export Financial Details – Filter by User

If 'Users' are enabled then Demands can already be exported en-masse using the option **File – Users Export**. This will export all of the demands for the landlords linked to this user.

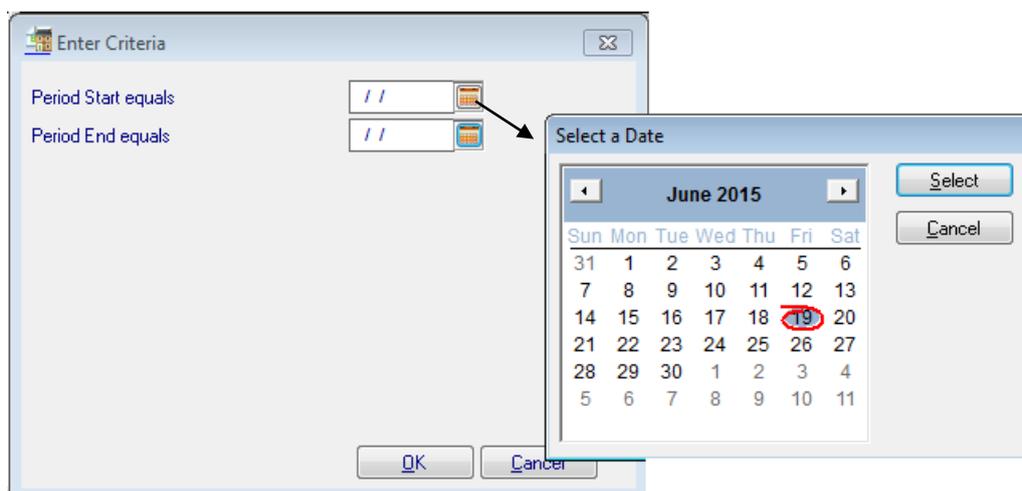
It is now possible to filter the option **File – Export** by user as well so that individual demands can be included or excluded, and picked from a date range.



This will restrict the list of Accounts to those linked to this user. All outstanding demands and invoices for this accounts link will be displayed allowing you to select/deselect individual ones.

Report Library – Calendar Button

It is now possible to click on a calendar box when selecting dates in the **Report Library**.



Latest Backup Information

The location and date/time of the most up-to-date backup of this business is shown on the Home Page.

Latest backup information

Date : 13/05/2015 03:14 PM

Location : Web Backup - SUPPORT slot 1

If the last backup is more than 7 days old it will be highlighted in red as a warning reminder that it is time to make another one – this period can be altered in **Tools – Options**.



DID YOU KNOW That we recently extended the number of free web backup slots available by an additional 10 to provide a secure location for backups away from your own office environment.

Training

We offer training on the use of the Property Manager program which can be carried out by one of our local trainers on-site for a full or half day.

Alternatively, if you only have a few queries – for example to tidy up your demand dates or design your own Demand layout, we can also offer remote training on the phone where we can log into your data and run through them with you.

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HR9 5BP

Telephone: 01594 545000
Fax: 01594 545012

Support: 01594 545022
Email: support@farmplan.co.uk

GateKeeper Support: 01594 545040
Email: gatekeeper@farmplan.co.uk



www.farmplan.co.uk