

LATEST RELEASES

28 May 2025 - VERSION 2.29.0



CRM RELEASE

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New features

Improved Printing for Calendar List View

The calendar printing functionality has been enhanced to make it easier to share and keep records of your upcoming appointments and events.

Previously, printing your calendar in **List View** would only produce a single page—no matter how many entries were visible. Now, all entries will be printed across as many pages as needed, ensuring you always have the full picture when printing your schedule.

This update is especially useful if you rely on printed calendars for meetings, team coordination, or record-keeping.

Consistent Purchaser Details Across All MOS Methods

We've enhanced the **Memorandum of Sale (MOS)** process to ensure a more consistent experience, no matter how you choose to generate the document.

Previously, purchaser details entered manually into the Offer Chain would appear in the MOS when using **'Generate Letter'**, but not when using **'Send MOS Email'**. We've now standardised this process—**manually added Purchaser 2 details will appear in both versions**, whether you generate a letter or send it via email.

This improvement ensures all key buyer information is captured and communicated clearly, regardless of how you choose to send your MOS.

Improved Calendar Performance with Smarter Recurrence Limits

To help keep calendars running smoothly we've introduced a limit on how many times a recurring appointment can repeat.

Previously, it was possible—often by mistake—to set an event to repeat up to **9,999 times**, which could significantly slow down system performance and delay users' calendar events.

To avoid this and improve reliability, recurring events are now capped at a maximum of **50 repetitions**. This helps ensure calendars remain fast, efficient, and easy to manage for everyone.

Landlord Insurance Tracking on Property Records

We've added a new feature to help you stay on top of landlord insurance requirements and reduce risk across your managed properties.

You can now record whether **landlord insurance is in place** for a property, along with the **policy renewal date**—giving you greater visibility and control when managing multiple properties and compliance obligations. **You can set these on your Lettings properties in the 'Other' tab of the Property Details page.**

Rightmove Click Stats Now Visible on Vendor Portals

We've improved the **Vendor and Landlord Portals** to ensure property performance data is always visible and up to date.

Vendors can now see how many times their property has been viewed on Rightmove—directly from their portal—providing greater insight into buyer interest and overall market performance.

This enhancement supports better communication with your clients and ensures a more transparent.

Scheduled Management Fees for Consistent, Predictable Charging

We've introduced a new **Scheduled Management Fee** option to give you greater control over how fixed management fees are applied—regardless of rent collection or landlord payment activity.

With this new option, you can now **set a fixed management fee to be charged at regular intervals (e.g. monthly or quarterly)** directly on the property ledger. This ensures you charge **one consistent fee per period**, even if there are multiple payments—or no payments—made to the landlord during that time.

You'll find the new **Scheduled Management Fee** section under **Lettings Property > Details**, where you can set the fee amount, frequency, next charge date, and whether it should apply during vacant periods.

The original fixed fee setup remains unchanged for those who prefer the current behaviour—so you have the flexibility to use whichever method best suits your business.

Additional updates & General Improvements

We're making further improvements to enhance speed and performance alongside system stability.

For more information or support call: 01865 860 871