

# LATEST RELEASES

30 July 2025 - VERSION 2.33.0



# CRM RELEASE

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### New features

#### Branch Selection Now Filters When Adding Contractors

We've improved the process of adding new contractor records to ensure better accuracy and control.

Now, when you create a new contractor, the **'Select Branches Serviced'** list will only display **branches the user has access to**. This makes it easier to assign the correct branches and prevents unintended selections.

This update helps streamline setup and ensures contractors are linked only to relevant parts of your business.

#### Inspection Templates Now Retain Room Order

We've enhanced how **inspection templates** work to ensure greater consistency and accuracy during property inspections.

Now, when a template is set up with rooms in a specific order, that **same room order will be retained** when the template is used to create an inspection. This ensures inspections follow a clear, logical structure—just as intended when the template was designed.

This update helps save time, reduce errors, and provide a more professional experience during property visits.

#### Next Due Date Updates When Editing Service Charge Details

We've made an improvement to how **Tenant Service Charges** behave when editing key details—helping to avoid confusion and ensure greater clarity.

Now, when you update the **Start Date** or **Charge Period** of a service charge (e.g. changing the start date from 14/06/25 to 14/07/25), the **Next Due Date** will automatically recalculate based on the new information.

#### Order by Property Address on Accounts Screens

You can now **sort by Property Address** on key accounts screens, including the **Rapid Collect** and **Outstanding Invoices** views.

Clicking the **Property** column header will now correctly sort the list in either ascending or descending order, making it easier to locate and manage records by address.

This small but helpful improvement makes navigating financial data quicker and more intuitive.

## Greater Flexibility When Adding Room Details

You now have access to a wider selection of **pre-defined room types**, giving you more flexibility when adding room details to property records.

These room types can be enabled by users with access to **Configuration** by navigating to:

**Configuration > Lookups > Common > Room Types**

From there, you can select from the **Options Available** and add them to your **Selected Options** list.

This update allows you to tailor room details more accurately to reflect the properties you manage.

## Known Issue Resolved: Contractor Invoices Not Attaching to Statement Merge

We would like to make you aware that any invoices added between 08 July & 28 July 2025 will not be included in the **Contractor Invoice attachment** option during the **statement merge** process. Where invoices were added within this date range they can be viewed as normal in CRM within Property Management Task(s)

Invoices added outside of this date range will be attached as normal based on your settings.

## 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**