

LATEST RELEASES

19 November 2025 - VERSION 2.40.0



CRM RELEASE

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New features

Performance improvements in Global Search

We've improved the performance of Global Search (accessible via the magnifying glass in the top toolbar) to make finding information faster and more efficient.

You can now search for any record across CRM, reducing the need to navigate through individual dashboards.

Consistent Tax Reporting Across NRLQ and NRLY

We've enhanced the NRLQ report to ensure it now fully accounts for Landlord Tax Adjustment transactions within its tax calculations.

This improvement brings the NRLQ report in line with the NRLY Annual Return for Year Ending 2025, ensuring consistent and accurate tax totals across both reports based on the same underlying transactions.

Additional updates & General Improvements

We've continued to make enhancements to CRM

For more information or support call: 01865 860 871

Coming Soon – New Calendar

Keeping track of appointments — whether for viewings, appraisals, or property management — is a key part of your day-to-day. To make this easier, we've been working hard on a brand-new calendar experience in CRM.

The new calendar features an updated layout and design for a clearer view of your schedule, along with a much-improved mobile experience and enhanced performance.

This will be introduced into CRM over the next few weeks, and you'll have the option to switch between the **classic** and **new** calendar as you get used to the changes.

In the meantime, you can take a sneak peek at what's coming below.

The screenshot displays the new CRM calendar interface. On the left is a sidebar with filters: 'Add Event' (orange button), 'Reset filters', 'Calendar type' (input field), 'Event type' (input field), 'Branch' (input field), 'Sync Outlook events' (toggle), 'Sync Google events' (toggle), 'User' (search field), and a user selection section with a checked box for 'Paul Evens (Me)'. The main area shows a weekly calendar for September 2025, with columns for Monday, Tuesday, and Wednesday. Events are represented by colored bars: pink for 'blocked out', orange for 'Appraisal: 1 Meadowfield Gardens, Newcastle...', blue for 'Appraisal: 9 Stannington Place, Ponteland, Ne...', and purple for 'Viewing - Tanglewood Faringdon Road, King...'. A teal bar indicates a 'Viewing Slot' on Wednesday. The interface includes navigation for 'Today', a calendar icon, and date range 'Sep 01 - 30, 2025'.