



Landlord Property Manager V9 – New Features User Guide



Award Winning Software – Designed by Landlords
for Landlords.

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Landlord Property Manager

The aim of this guide is to take you through the updates that have been released through the Landlord Property Manager v9 solution.

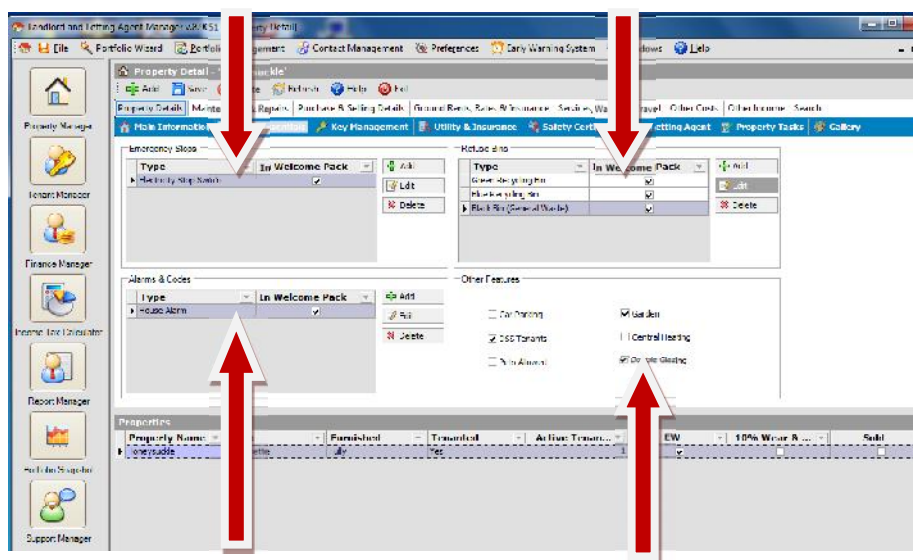
This tutorial goes through a case study showing you the new functionalities within this software.

1. Property Essentials

The Property Essentials tab can be found at the second blue tab within Property Manager and once opened has four areas:

Emergency Stops

2) Refuse Bins



3) Alarms & Codes

4) Other Features

1.1. Emergency Stops

This area enables you to record the position of all emergency stop taps within the property, e.g. water stop taps, gas meter taps. It is essential your tenants are able to turn off supplies if the need arises with the minimum amount of hassle.

To set-up an emergency stop click on the “Add” button.

You can then enter the details of the emergency stop.

The screenshot shows a software window titled "Emergency Stop". At the top is a menu bar with icons and labels for "Save", "Refresh", "Help", and "Exit". Below the menu bar, the "Emergency Stop Type:" label is followed by a dropdown menu currently showing "Gas Stop Tap". To the right of this dropdown is a small button with a downward arrow and three dots. Below this is a checkbox labeled "Print on Tenant Welcome Pack" which is checked. Underneath is the "Emergency Stop Location:" label, followed by a large text area containing the text "Located in the garage in the white cabinet".

Choose the type of emergency stop, or add your own.

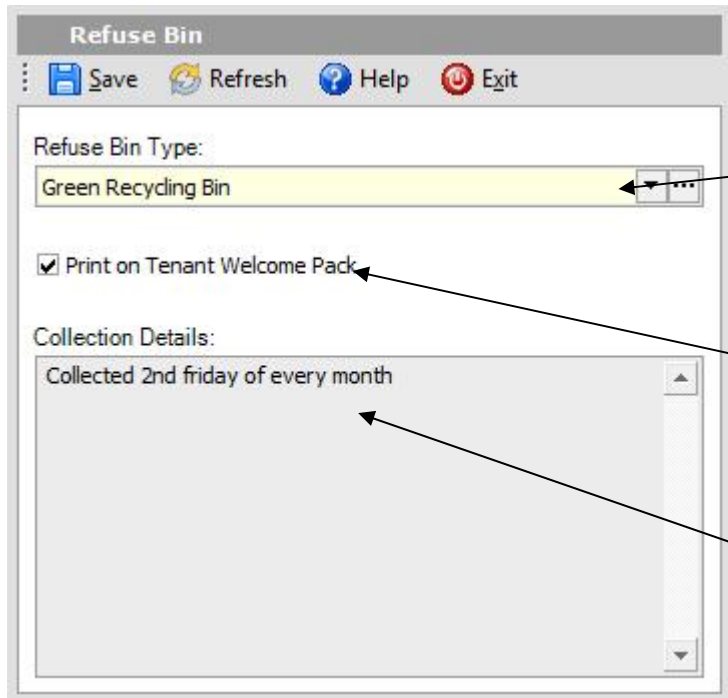
If you want the details of the stop tap to print on the Tenant Welcome Pack, chose this flag.

Enter the details i.e. the location of the stop tap here.

1.2. Refuse Bins

This area enables you to record information such as the different types of refuse bins there are and also the collection days. With the increasing number of refuse collection bins and different collection days it is important you keep this information in one central place.

To set-up refuse collection bins and their deliver days click on the “Add” button.



The screenshot shows a 'Refuse Bin' dialog box with a menu bar containing 'Save', 'Refresh', 'Help', and 'Exit'. The 'Refuse Bin Type:' section has a dropdown menu with 'Green Recycling Bin' selected and an 'Add' button (three dots) to its right. Below this is a checked checkbox labeled 'Print on Tenant Welcome Pack'. The 'Collection Details:' section features a text area containing 'Collected 2nd friday of every month'. Three callout boxes provide instructions: the first points to the 'Add' button, the second points to the 'Print on Tenant Welcome Pack' checkbox, and the third points to the text area.

Refuse Bin

Save Refresh Help Exit

Refuse Bin Type:

Green Recycling Bin

☒ Print on Tenant Welcome Pack

Collection Details:

Collected 2nd friday of every month

Choose the type of refuse bin, or add your own.

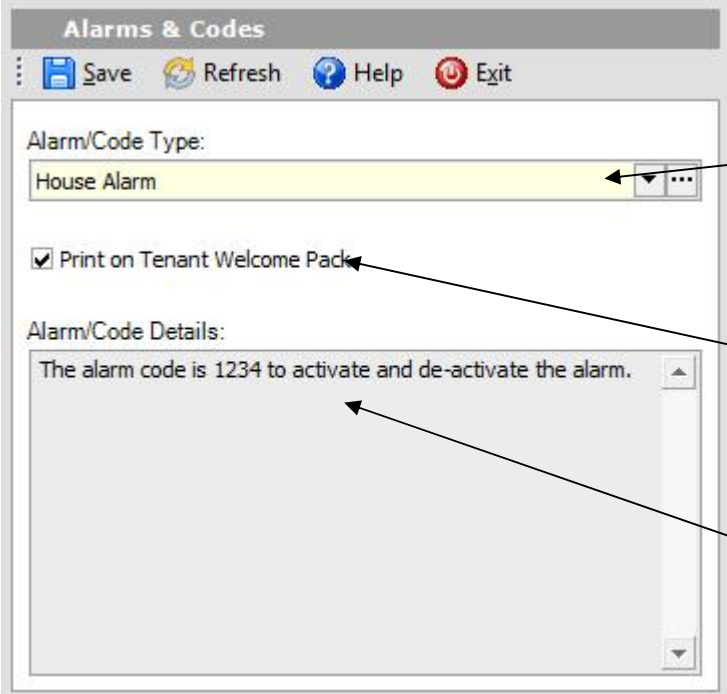
If you want the details of the refuse bin to print on the Tenant Welcome Pack, chose this flag.

Enter the details i.e. when the bin is collected.

1.3. Alarms & Codes

This area enables you to record the type of alarm and access code details associated with the property.

To enable this function click on the “Add” button.



The screenshot shows a window titled "Alarms & Codes" with a menu bar containing "Save", "Refresh", "Help", and "Exit". The main area is divided into two sections. The first section, "Alarm/Code Type:", features a dropdown menu with "House Alarm" selected and an "Add" button (represented by three dots) to its right. The second section, "Alarm/Code Details:", contains a text area with the text "The alarm code is 1234 to activate and de-activate the alarm." and a "Print on Tenant Welcome Pack" checkbox which is checked. Three callout boxes with arrows provide instructions: the first points to the "Add" button, the second points to the "Print on Tenant Welcome Pack" checkbox, and the third points to the text area.

Choose the type of alarm code, or add your own.

If you want the details of the alarm code to print on the Tenant Welcome Pack, chose this flag.

Enter the details i.e. hot to set the alarm code.

1.4. Other Features

In the 'Other Features' section it is possible to set flags to indicate to prospective tenants what features the property has. For example, if the property has double glazing, you would set the "Double Glazing" flag.

Other Features

☒ Car Parking

☐ Garden

☒ DSS Tenants

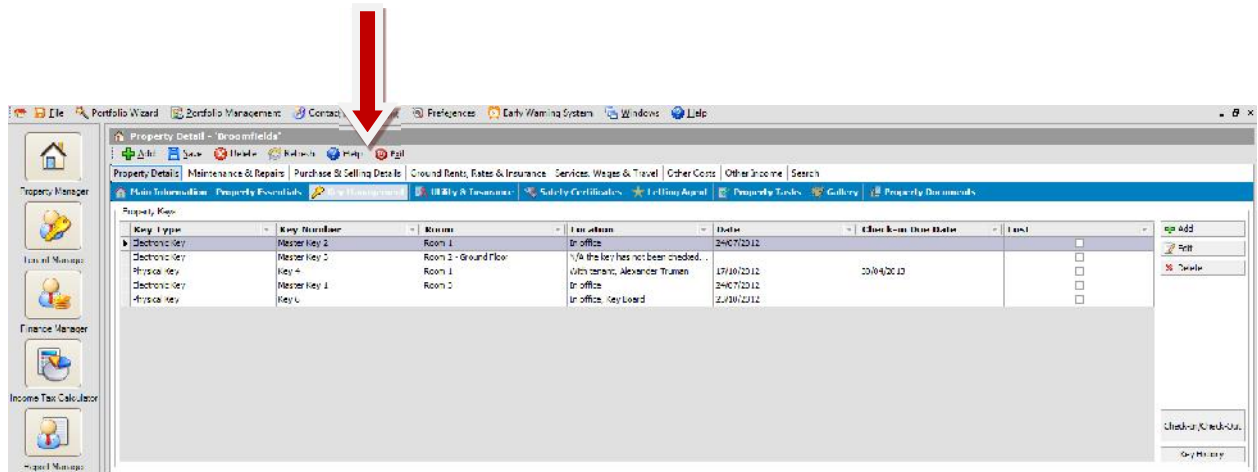
☐ Central Heating

☒ Pets Allowed

☒ Double Glazing

2. Key Management

The 'Key Management' is a solution for managing the whereabouts of property keys including booking-in and booking-out and can be found at the third blue tab within Property Manager (as illustrated above). If you have a number of keys for a property, then it is important to be able to record the whereabouts of them.



2.1. Creating Keys

To set-up a Key you press the 'Add' Button:

The 'Property Key' form contains the following fields and callouts:

- Key Type:** A dropdown menu with 'Physical Key' selected. Callout: "Choose the type of key, or add your own."
- Room:** A dropdown menu with 'Room 1' selected. Callout: "If the key is for a specific room, specify which room."
- Key Number:** A text field containing 'KEY10980'. Callout: "Give the key a unique reference, followed by a description."
- Key Description:** A text field containing 'Master key'.
- Key is Lost:** A checkbox that is currently unchecked.
- Date when Lost:** A date picker field.
- Notes:** A text area containing 'This is the master key for Room 1 in property Broomfields'. Callout: "Any notes you want to record about the property can be entered here."

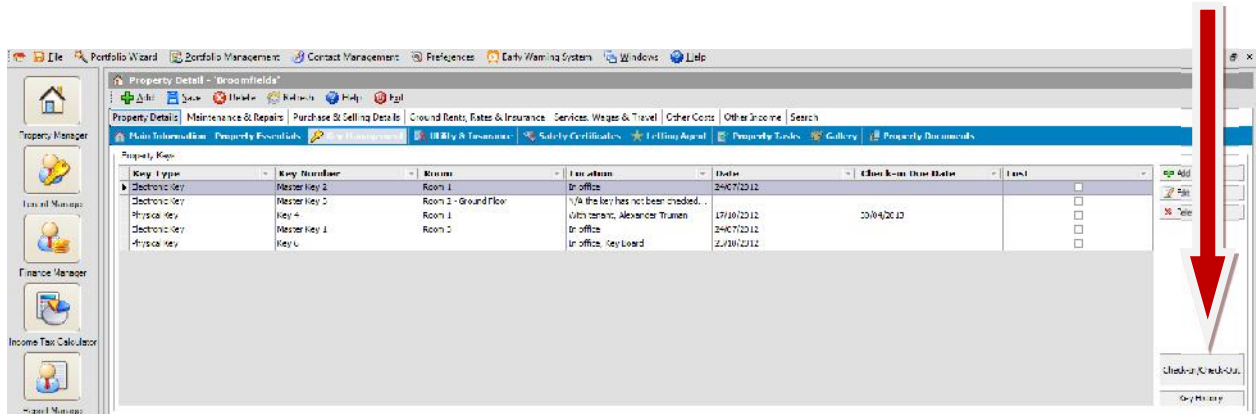
Press 'Save' and the key will be added to list of other keys for the property.

The 'Property Detail' window for 'Broomfields' shows a list of keys. A red arrow points from the 'Save' button in the 'Property Key' form to the 'Add' button in the 'Property Keys' table.

Key Type	Key Number	Room	Location	Date	Check-In Due Date	Lost
Physical Key	KEY10980	Room 1	100 Broomfields Lane, Broomfields	24/07/2015		<input checked="" type="checkbox"/>
Physical Key	Master Key 2	Room 1	100 Broomfields Lane, Broomfields			<input type="checkbox"/>
Physical Key	Master Key 3	Room 1 - Ground Floor	100 Broomfields Lane, Broomfields			<input type="checkbox"/>
Physical Key	Key 4	Room 1	100 Broomfields Lane, Broomfields	1/07/2017	01/04/2018	<input type="checkbox"/>
Physical Key	Master Key 1	Room 1	100 Broomfields Lane, Broomfields	24/07/2012		<input type="checkbox"/>
Physical Key	Key 5	Room 1	100 Broomfields Lane, Broomfields	23/12/2012		<input type="checkbox"/>

2.2. Check-in/Check-out of a Key

Once a key has been created, it then becomes necessary to track the whereabouts of a key. For example when a tenant moves in, you may give them one or two sets of keys. It is important you are to record this information and can do so via the 'Check-in/Check-out' button.



On this screen you can enter the check-in/check-out date and the location of the key.

The 'Key Check-In/Check-Out' dialog box is shown. It has a 'Date' field with a dropdown menu showing '31/10/2012'. Below it is a 'Key Location' section with three radio buttons: 'In Office' (selected), 'With Tenant', and 'With Contact'. Below that is a 'Location in Office' field with a dropdown menu and a button. At the bottom is a 'Notes' section with a text area.

If you select the location of the key as the office you are able to select where the key is located within the office.

Key Check-In/Check-Out

Save Help Exit

Date:
31/10/2012

Key Location

☐ In Office
☒ With Tenant
☐ With Contact

Tenant:
Alexander Truman

Check-in Due Date:
30/04/2013
☒ Use the tenancy end date

Notes:

If you select the location of the key as with Tenant then you are able to enter tenant information and also the Check-in Due Date.

If you check the "Use the tenancy end date" box this date will be inserted automatically into the "Check-in Due Date".

Key Check-In/Check-Out

Save Help Exit

Date:
31/10/2012

Key Location

☐ In Office
☐ With Tenant
☒ With Contact

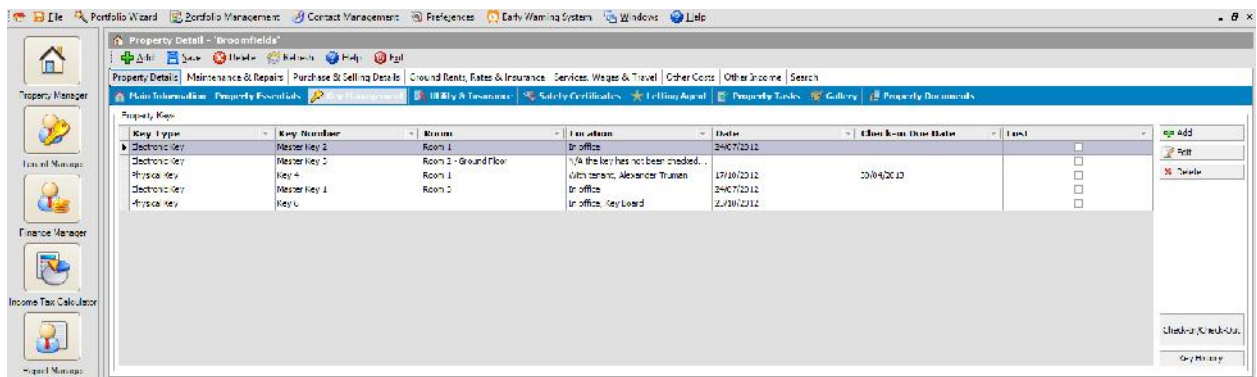
Contact:
H. Garde & Son

Check-in Due Date:
30/04/2013

Notes:


You can also allocate a key to a contact in your contact list and then set the check-in due date accordingly.


Once the keys have been checked-in/out, you are able to clearly see where each key is:





2.3. Key History

The Key History button when pressed opens up to show you a history of the recorded events of the key.

Key History

 Refresh

 Help

 Exit

Date	Location	Check-in Due Date	Notes
▶ 31/10/2011	With contact, H.Guarde & Son	05/11/2011	
31/10/2011	With tenant, Alexander Truman	30/04/2012	

3. Tenant Management Changes

A number of enhancements have been made to the 'Tenant Management' module and these include:

- Ending Tenancy Early - Calculating Daily Rental
- Change Rent Functionality Enhancement to change individual rents
- Changing the payment Term Midway through Tenancy
- Capturing a Tenant Forwarding Address
- Storing all emails that are sent from the mail merge solution in the Tenant Journal
- Property / Room address (Tenant's contact information i.e. Telephone and email address)
- New payment term added to allow for four monthly payments

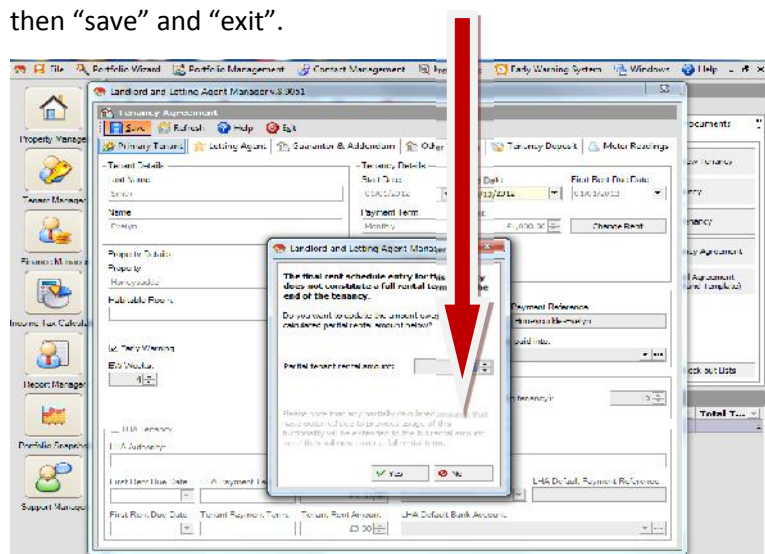
3.1. Ending Tenancy Early – Calculating Daily Rental

Prior to this update when a tenancy was ended early a calculation had to be made, manually, as to how much rent was owed over a partial rent period, say 3 weeks of a monthly rental period or 3 days of a weekly rental period. The Landlords Property Manager now automatically works this out for you.

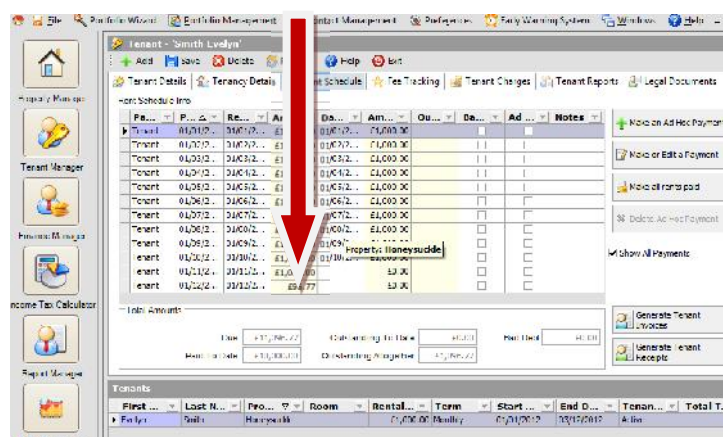
To end a tenancy early you would as usual go to:

Tenant Manager → Tenancy Details → Select Tenant → Edit Tenancy → End Date → Save → Yes → OK.

This window opens which shows you the partial tenant rental amount and you will click on “yes” and then “save” and “exit”.

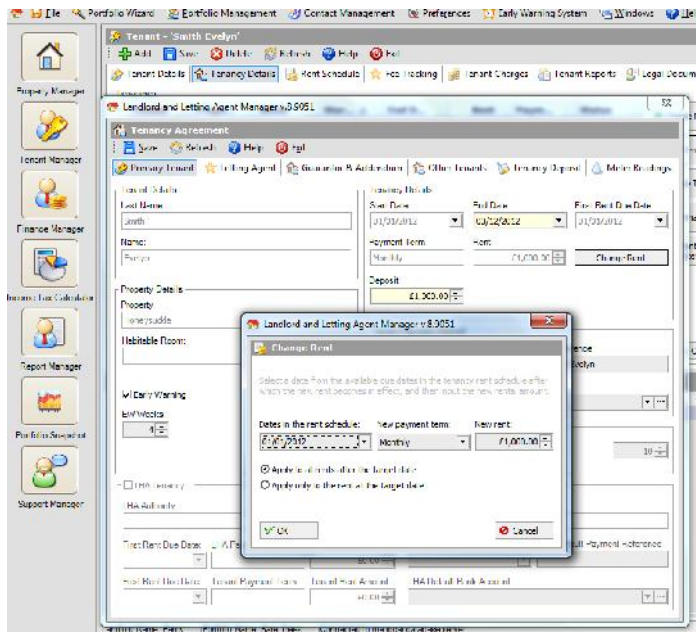


You can see in the rent schedule that the partial payment has been inserted.

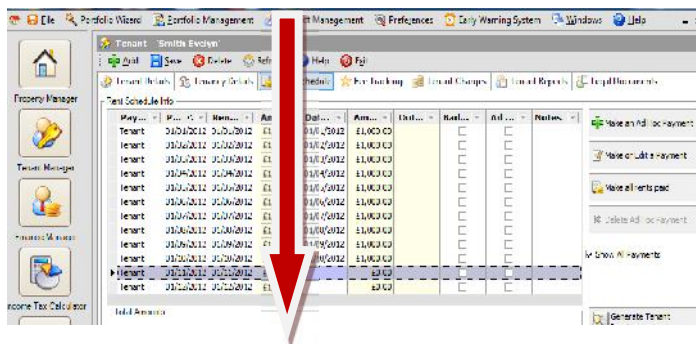


3.2. Change Individual Rents Entries

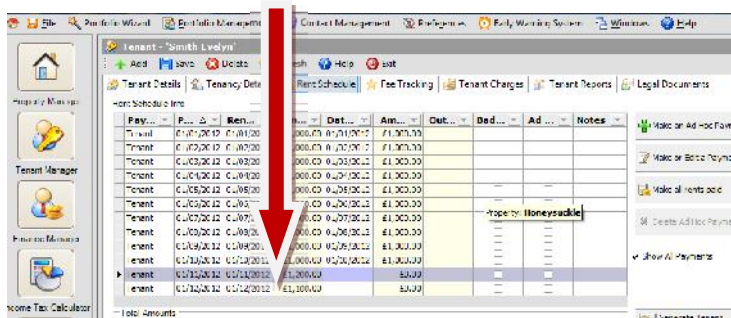
You can now easily change the rent amount with this enhancement for a single rent schedule entry. Click on Tenant Manager → Edit Tenancy → Change Rent, and the following window is displayed:



Enter the new rent and you have two options to decide how you want the change to be applied. You can either “Apply to all rents after the target date”. If you select this the rent schedule will show the new rent from the date you selected for all subsequent rents:



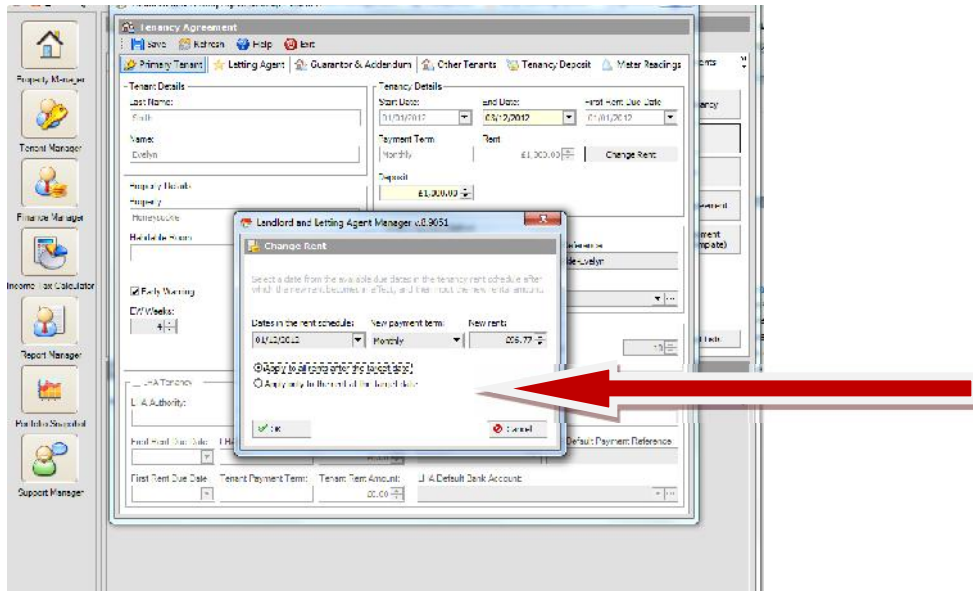
Should you select “Apply only to the rent at the target date” then once you have changed the date and clicked “ok” the rent schedule will show the rent change for that one rent schedule only:



3.3. Changing Payment Term During A Tenancy

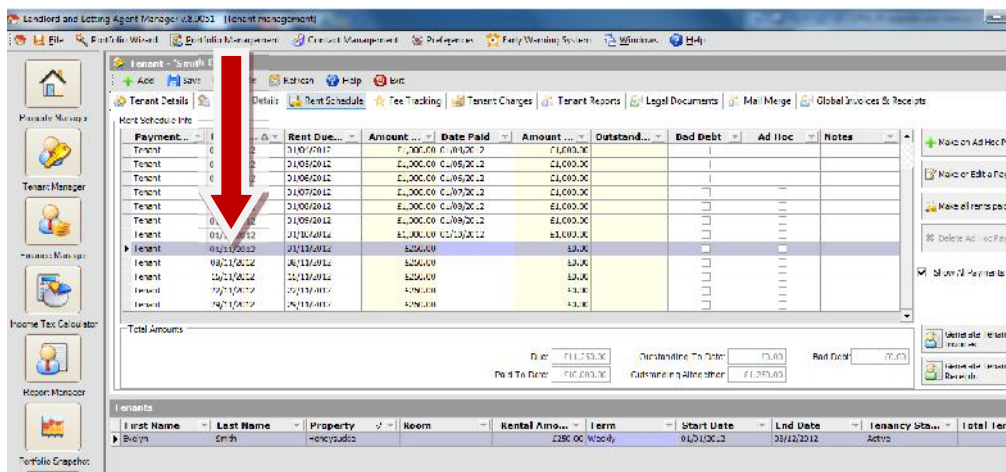
Historically the software was unable to let the user change the tenant's payment term once the tenancy had been created. Now with this enhancement you have the ability to change the tenant's payment term during the existing tenancy as many times as is required.

To use this function click on Tenant Manager ➔ Tenancy Details ➔ Edit Tenancy ➔ Change Rent and you will see the following window open:



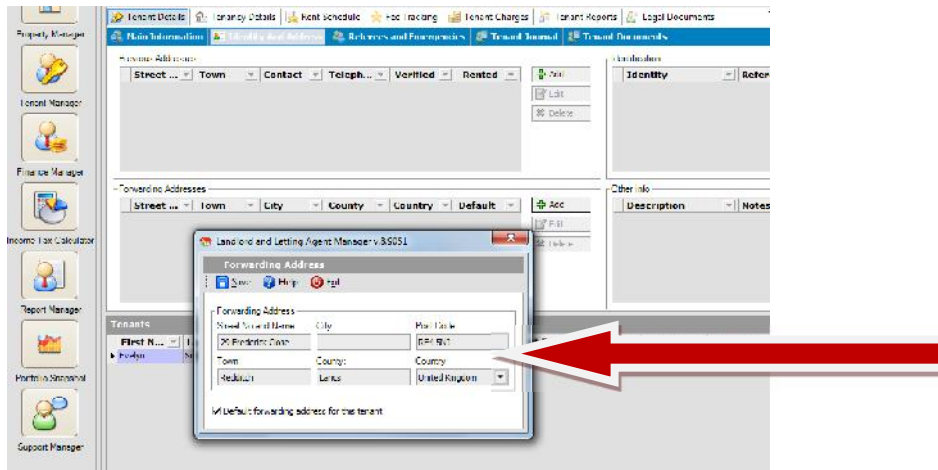
There is an option to change the payment term for example from monthly to weekly. You must enter the rent figure and the date from when the new payment term is to apply.

Click on "ok". A message appears to let you know that the rent was changed successfully, click on "exit" then click on "rent schedule" and view the changes:



3.4. Capturing a Tenant Forwarding Address

A useful record to have is a tenant's forwarding address, so that you can communicate with them or forward them mail that is still coming to the property. You can do this by clicking on Tenant Manager ➔ Identity and Address. You will see the screen is split and you need to click on the "Add" button at the right hand side of "Forwarding Addresses" block.

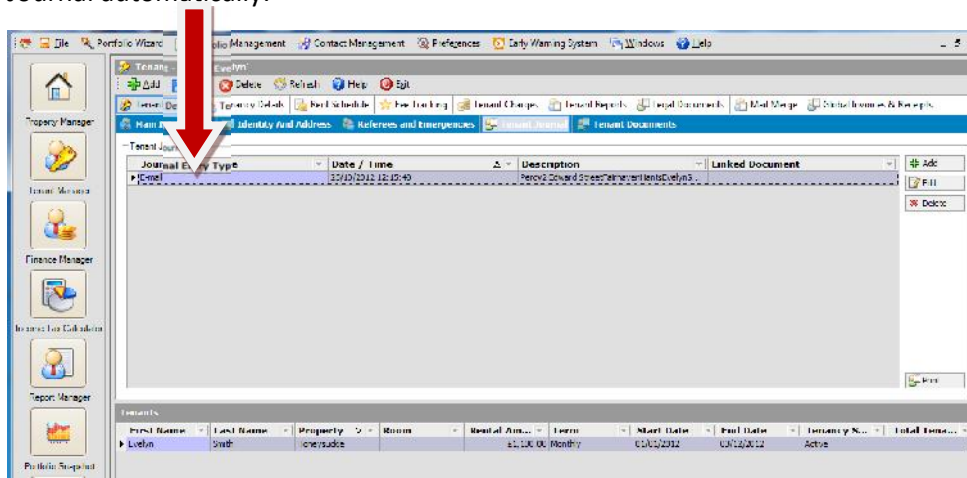


Place a tick into the "Default forwarding address for this tenant and any correspondence for this former tenant which is created in mail merge will be automatically addressed to this forwarding address. You have the option to leave the box unticked or remove the tick at a later date.

The tenant forwarding address fields now also appear in the 'Mail Merge' section, so you still communicate with them through the software.

3.5. Automatic Saving of Emails in Tenant Journal

When you send an email from the mail merge option a copy of the email is placed into the Tenant Journal automatically:



3.6. Tenant Manager – More Information

In the Tenant manager Screen, additional data is displayed including:

The email address of the tenant

The mobile telephone number for the tenant

The property address the tenant is allocated to

The screenshot shows the 'Tenant Manager' software interface. The top menu bar includes options like 'Add', 'View', 'Delete', 'Refresh', 'Help', 'Print', 'Export', 'Import', 'Tenant Changes', 'Tenant Reports', 'Print Documents', 'Mail Merge', and 'Email Notices & Receipts'. The left sidebar contains icons for 'Property Manager', 'Tenant Manager', 'Finance Manager', 'Income Tax Calculator', 'Report Manager', and 'Portfolio Services'. The main area is divided into two sections: 'Personal Information' and 'Most Recent Tenancy'.

Personal Information:

- Name & Title:** Mr, Mrs, Miss, Ms, Dr, Other (dropdown), First Name: Thompson, Last Name: Jill
- Initials:** JT
- Date of Birth:** 21/12/1980, **Age:** 30
- Telephone:** Home: 01234 567 890, Mobile: 07789 901 234, Email: jthompson@bt.com
- Tenant Occupation:** Occupation: Accountant, Work Telephone: 01234 567 890
- Street Information:** Street Name: Gals, Post Code: M1 1AA, Town: Manchester, County: Greater Manchester, Country: United Kingdom

Most Recent Tenancy:

- Property Name:** Gals
- Start Date:** 01/01/2010, **End Date:** 31/12/2010
- Rent:** 800.00, **Deposit:** 800.00
- Notes and Comments:** Notes: (empty text area)

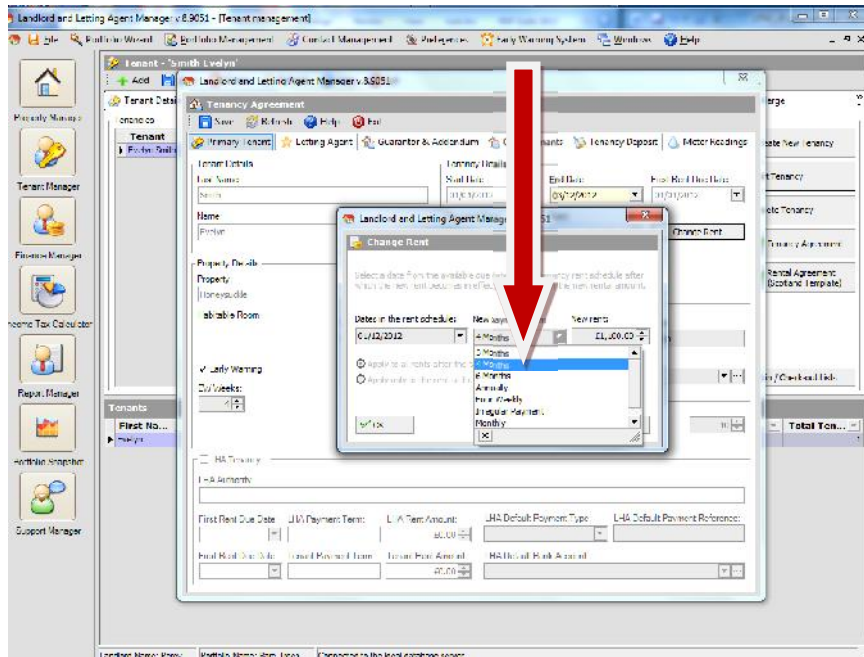
Tenants Table:

First Name	Last Name	Email	Mobile	Property	Room	Address	Rental	Term	Start Date	End Date	Tenancy Status	Total Ten...
Alex	Anderson	alex@bt.com	07789 901 234	Upperville	Room 1	63 Galloway, Grove, Cheshire, CH1 1H, UK	800.00	Monthly	01/01/2011	30/06/2011	Lapsed Tenancy	1
Alexander	Truman	alex@bt.com	07789 901 234	Upperville	Room 2 - Ground F...	63 Galloway, Grove, Cheshire, CH1 1H, UK	800.00	Monthly	01/01/2010	30/06/2010	Active	2
Alfred	Robert	alfred@bt.com	07789 901 234	Woodson	Room 1	63 Galloway, Grove, Cheshire, CH1 1H, UK	800.00	Monthly	01/01/2010	30/06/2010	Active	1
Jerry	Stedstone	jerry@bt.com	07789 901 234	Room 1	Room 1	63 Galloway, Grove, Cheshire, CH1 1H, UK	800.00	Monthly	01/01/2010	30/06/2010	Lapsed Tenancy	1
Jill	Thompson	jthompson@bt.com	07789 901 234	Upperville	Room 2 - Ground F...	63 Galloway, Grove, Cheshire, CH1 1H, UK	800.00	Monthly	01/01/2010	30/06/2010	Lapsed Tenancy	2

Remember, you can print this list, using our 'Smart Print' feature. Just simply right click your mouse over the display list and you will have an option to print the list. You can then either print the list to your local printer or save it as a file e.g. Excel, MS Word etc.

3.7. New Four Monthly Payment Term

Included in the payment term option is a 4 Month option specifically for those rents which are due on a quarterly basis.



4. Improvement for HMO / Multi-Let Properties

One of the key benefits of Landlords Property Manager is that it makes managing Multi-let properties easy. We have now added the following new features:

- Ability to see 'Room Occupancy' in Portfolio Snapshot
- Detailed new HMO Room Occupancy Report
- When starting software, tenants who are assigned to properties with HMO rooms are asked to assign to HMO room

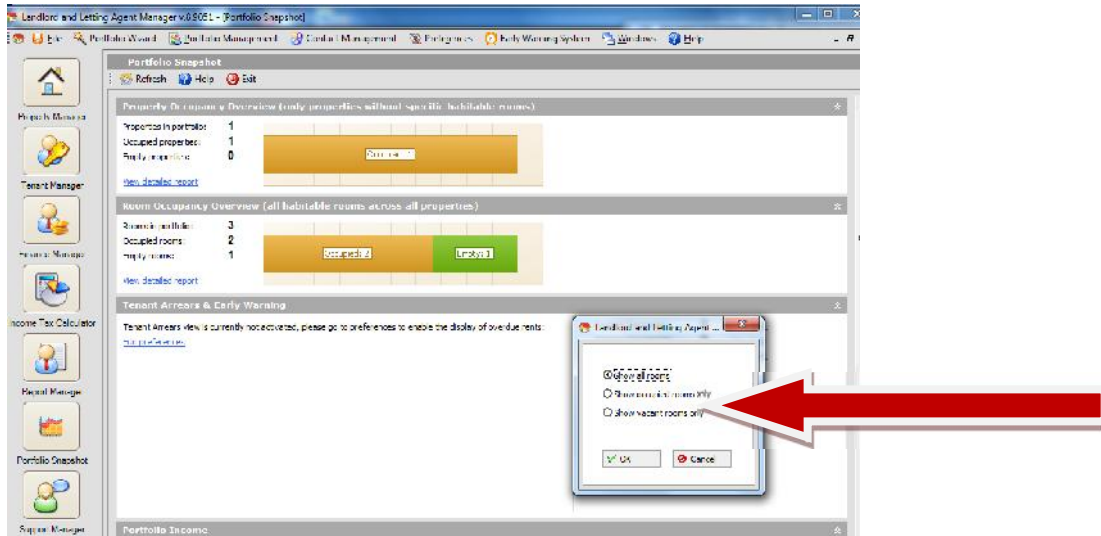
4.1. Ability to see 'Room Occupancy' in Portfolio Snapshot

Previously on the Portfolio Snapshot it was not possible to display room occupancy when portfolios had HMSOs. As you can see from the following image you are now able to do so.



4.2. New HMO Room Occupancy Report

Within the Portfolio Snapshot you can now create a “Room Occupancy Report” by clicking on the “View Detailed Report” link which opens a window allowing you to choose one of three options:



Choose “Show all rooms” and the following report is produced:

Room	Status	Start Date	End Date	Tenant(s)
Room 2	vacant (1 Room is not shown as it is in data)			
Room 3	Occupied	01/10/2010	30/11/2010	Tony, Allie
Room 1	Occupied	01/10/2012	21/12/2012	Rosemary Oliver

Choose “Show occupied rooms only” and the following report is produced:

Landlord and Letting Agent Manager v3.9051 - [Report Module]

Report Generator

Export to Excel Export to Word Export to HTML Edit

Property: The Hawthorns

as of date: 25/10/2012

Room	Status	Start Date	End Date	Tenant's Name
Room 1	Occupied	01/01/2012	30/09/2012	Mr. Smith
Room 2	Occupied	01/01/2012	31/03/2012	Mr. Jones

Choose “Show vacant rooms only” and the following report is produced:

Landlord and Letting Agent Manager v3.9051 - [Report Module]

Report Generator

Export to Excel Export to Word Export to HTML Edit

Property: The Hawthorns

as of date: 25/10/2012

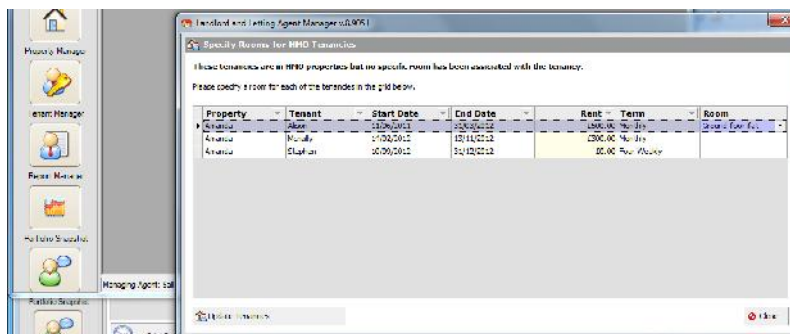
Room	Status	Start Date	End Date	Tenant's Name
Room 2	Vacant (this room has never been occupied to date)			

4.3. Assigning HMO Rooms on Start-up

When the software is opened for the first time after the version 9 update then any tenants that have been assigned to a property with HMO rooms, but the room has not been specified against the tenancy will need to assign the rooms.

This is required so that the occupancy reports can give a true picture of the property/room occupancy.

This screen displayed below will continue to be displayed at each occurrence of the software being opened until all the rooms have a tenant assigned to it.



5. Early Warning System Changes

The following changes have been made to the Early Warning system:

- Transaction Drilldown
- Room added to the expiring tenancies tab

5.1. Transaction Drilldown

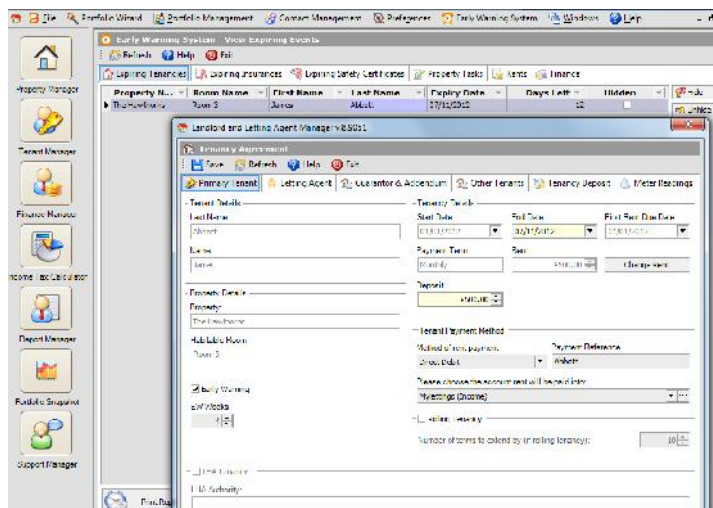
In the 'Early Warning' system, you now have the ability to double click on:

- Expiring Tenancies
- Expiring Insurances
- Expiring Safety certificates

and jump straight to the relevant transaction.

Click onto the tab “Early Warning System” → View EW Events → Expiring Tenancies and you can see a list of those tenancies due to expire within the range that you have previously set.

Double click in one of the record lines and it takes you to the “Tenancy Agreement” screen as so:



Similarly if you click on the “Expiring Insurances” tab and double click on one of the record lines then you will be taken to the actual insurance details.

And if you click on the ‘Expiring Safety Certificates’ tab you can drilldown to the safety certificate detail.

Not only can you view expiring tenancies but this screen also displays any expiring room tenancies too:

Windows and Listing Agent Management 2011 [Early Warning System - View]

File Print & Wizard Profile & Management Admin Management Preferences Early Warning System Windows Help

Early Warning System - View Expiring Events

Filter: Filter Filter

Filtering Transactions Expiring Transactions Expiring Safety Certificates Expiring Tenants Back Finance

Overview Events - There are at least 1 day(s) over due

Property Name	Return Name	Tenant Name	LHA Authority	Rent Due	Days Overdue	Amount Due
The Leithmore	Return 1	James Abbott		7,725.00	50	£
The Leithmore	Return 1	James Abbott		7,725.00	51	£
The Leithmore	Return 1	James Abbott		01/09/2012	08	£
The Leithmore	Return 1					£
The Leithmore	Return 1					£
The Leithmore	Return 1					£
The Leithmore	Return 1	James Abbott		01/10/2012	28	£
The Leithmore	Return 1	James Abbott	South Wales Council	03/10/2012	32	£
						Total: £75

Cancel Back Report Home Selected Events Data

For this report to be displayed, the following conditions must be met:
 - The individual must be a tenant or agent in the system.
 - The individual must be a tenant or agent in the system.
 - The individual must be a tenant or agent in the system.

Events Due In 7 Days

Property Name	Return Name	Tenant Name	LHA Authority	Rent Due	Amount
---------------	-------------	-------------	---------------	----------	--------

7. Letting Agent Fees

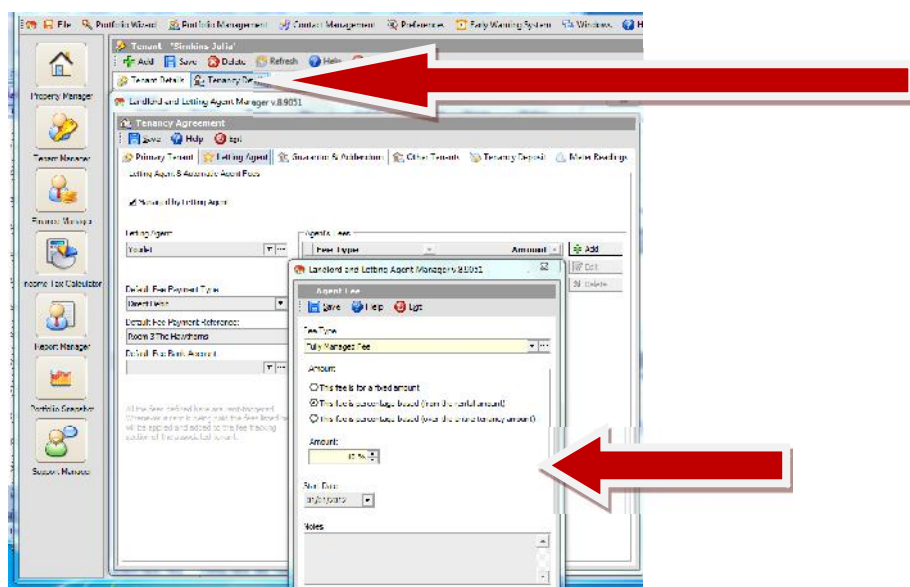
It is quite common for users to not only self-manage their properties but in many cases to have part or their entire portfolio managed to be managed by a letting agent.

Where properties are managed by a letting agent, we have developed a new solution for tracking commissions that are paid to letting agents.

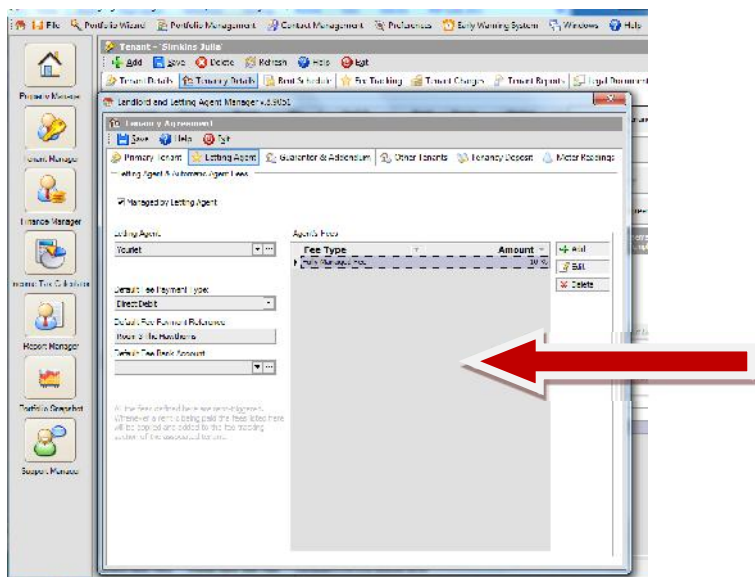
7.1. Creating Letting Agency Fees

The commissions must be set- during the creation of the tenancy agreement. If you have already inputted the property information then create the tenancy in the usual fashion.

Then click on Letting Agent and add the following information: Letting Agent, Default Fee Payment Type, Default Fee Payment Reference, etc and click on Save.



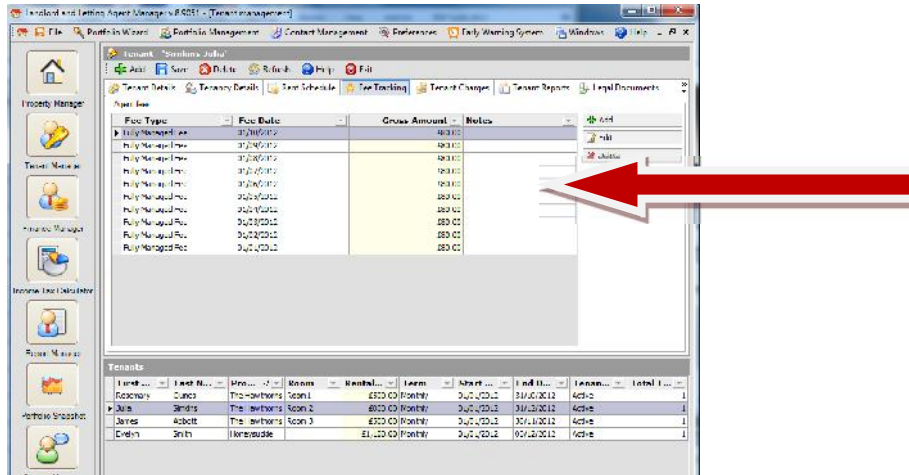
Then click on the “Add” button and the Agent Fee window opens allowing you to enter your information. Once you have clicked “Save” the following screen will display showing that the Agent’s Fees have been added successfully:



then click on “Save” and “Exit”.

7.2. Automatic Generation of Agency Fees

Once the rent starts being collected you will see the fees collected in the new “Fee Tracking” tab:

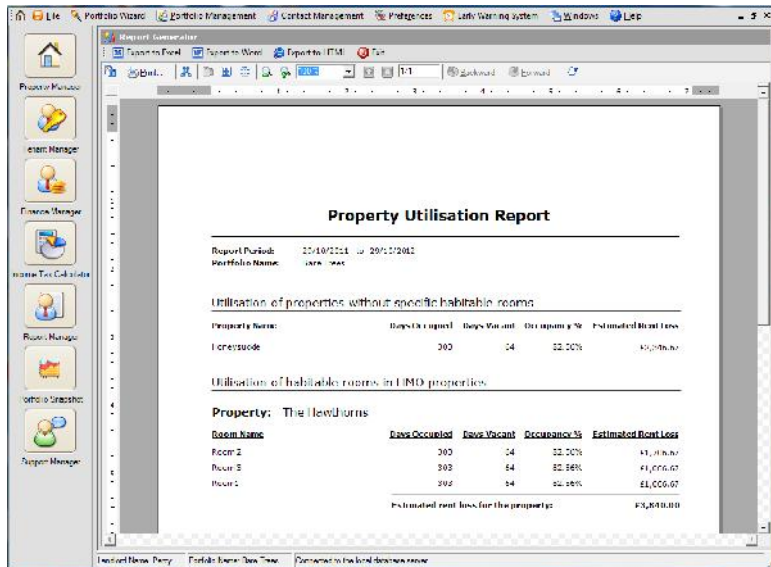


Please note that these Agent's Fees will not need to be entered as expenses anywhere else in the software. These Agent's Fees are also included in reports such as the Profit and Loss report.

It is also possible to create fees manually. You can use this function if say you have an ad-hoc letting fee to create or if you just want to manually create fees. To create fees manually simply press the 'Add' button.

8. Property Utilisation Report

This is a useful report which shows how many days a property/room has been occupied/vacant and also shows the estimated rent loss for portfolio over the period you have selected. The report can be found in the Report Manager function.

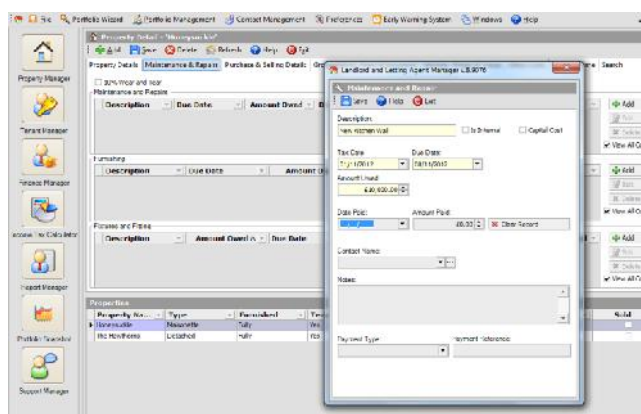


9. Better Expenses Management solution for Tracking Expenses

- The ability to enter due date and date paid for expenses
- New section called 'Expense Warnings' in 'Preferences', where you can specify after how many days past the due date an expense that has not been paid is classed as overdue
- In portfolio snapshot we have a section now called 'Overdue Expenses'
- In the EW system, we have a new tab called 'Expenses' that shows both overdue and expenses that are due

9.1. New 'Due Date' and 'Date Paid' expense fields

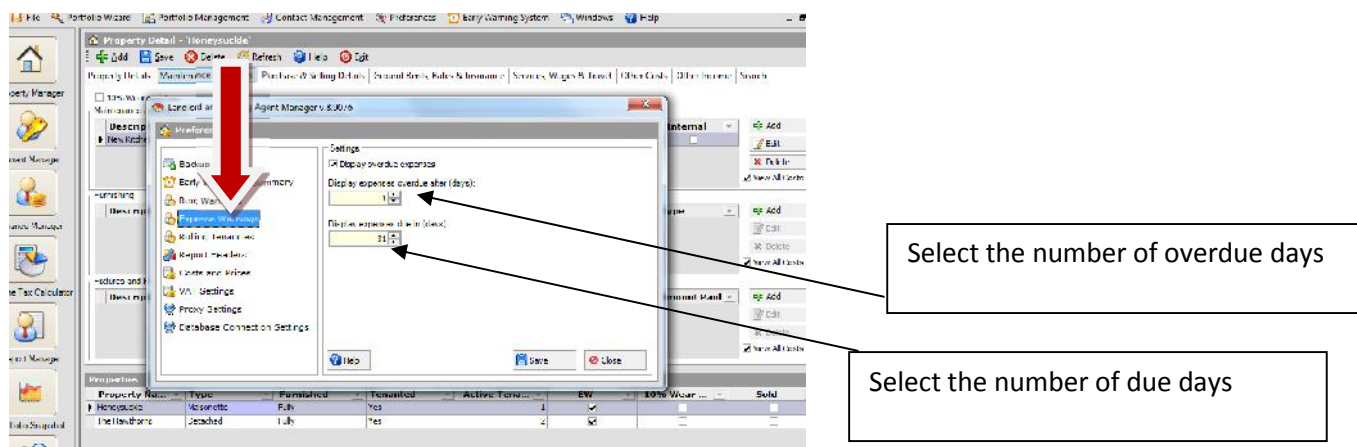
Under all the expense tracking screens there is now an ability to enter a "Due Date" and "Tax Date". For example to create an expense Property Manager → Maintenance & Repairs → Add → Description → Tax Date → Due Date → Amount Owed → Save.



All existing expenses when version 9 is upgraded will have the 'Due Date' and 'Date Paid' set to the 'Tax Date', which means that no difference will be seen on the reports.

9.2. New 'Expense Warnings' Section

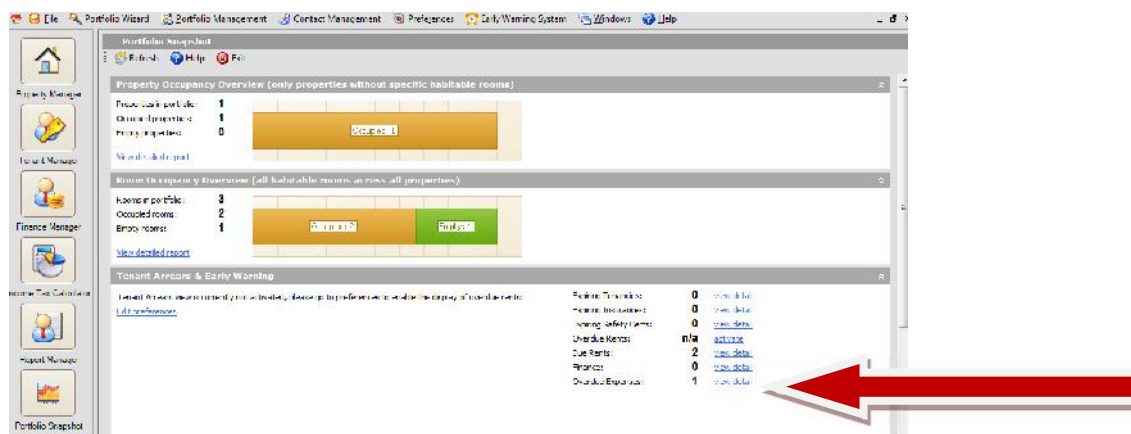
In Preferences, we have a new section called 'Expense Warnings', where you can specify after how many days past the due date an expense that has not been paid is classed as overdue:



Preferences → Preferences → Expense Warnings → Display expenses overdue after (days) → Display expenses due in (days) → Save. An information box will show with the message “Configuration successfully saved”.

9.3. New section ‘Overdue Expenses’ in portfolio snapshot

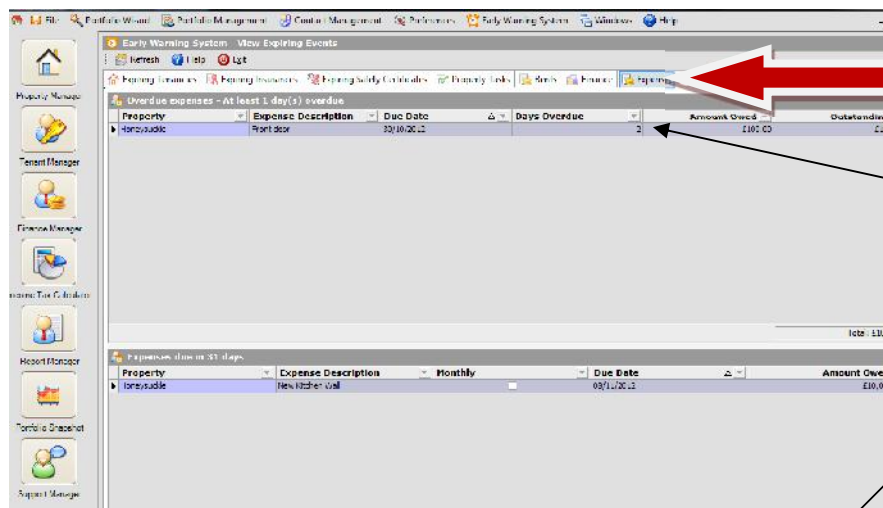
In portfolio snapshot we have a section now called ‘Overdue Expenses’, showing how many expenses are overdue and clicking on this takes you to the EW system.



You can click on the link ‘view detail’ and you will be taken to the Early Warning System where there is a new tab ‘Expenses’.

9.4. New tab ‘Expenses’ in the Early Warning system

In the EW system, we have a new tab called ‘Expenses’ that shows both overdue and expenses that are due.



Double click on here and it takes you to the entry screen

