

# Release 8.1.1

## March 2018

**Please distribute to all Spectra users in your company.**

Support Email: [support@Spectra.ca](mailto:support@Spectra.ca)  
Visit us online at: [www.Spectra.ca](http://www.Spectra.ca)  
Support Telephone: (866) 718-2345  
Support Fax: (866) 513-0961

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## BEFORE INSTALLING THIS UPGRADE

Make a backup of your Spectra databases before installing this upgrade. If for some reason, the upgrade fails or there is an issue in the new version that prevents you from using the upgrade, having a final backup before the upgrade may allow you to reinstall the previous version and resume working.

## GENERAL ENHANCEMENTS

### **BACKGROUND SCREENING FIX**

It was discovered that Microsoft made a code change that impacted the way Office products, specifically Access 2016 communicate with the web, causing users of the optional Background Screening Module to not be able to see reports. A programming change has now been made in Spectra, to bypass the Access code, and the result reports can now be viewed.

### **COMPACT, BACKUP AND RESTORE TOOL**

All zip filenames now include the database version number.  
*EX: backup\_8.1.1--2018-03-02--13-42-15.zip*

### **CONFIGURE SPECTRA TOOL**

Users that did not point to the live Spectra Data during install were experiencing issues with workstations not maintaining settings from Configure Spectra. Changes have been made to the Configure Spectra tool that will override the registry entry created upon install, and save the file path indicated with Configure Spectra.

## EIS DASHBOARD

It was reported that the Open Database button was not working on the dashboard. This has now been corrected.

The option to print reports from the EIS Dashboard has been restored as well.

## BANKING-START A TASK

### **BANK RECONCILIATION- BANK REC SUMMARY REPORT**

We have added a **Bank Rec Summary Report** that includes the statement date and status. This adds a quick way to review the status of the bank reconciliations for your banks, in one report. You can choose *All Banks* or you can choose individual banks.

<b>Bank Rec Summary</b>							As Of: 16-Mar-18	16-Mar-2018
								Page 1
Bank Name	Active	Building Name	Active	Account #	GL	Statement Date	Completed	
1st Bank Of Arizona-Plaza	Yes	Plaza Tower	Yes	123456789	Plaza.1010	31-Mar-2018	No	
Arizona Federal-Wright	Yes	Frank Lloyd Wright Expansion	Yes	336125648	No Bank Rec			
M&I Thunderbird-LMOCA	Yes	LaCasa Medical of Central Arizona Administration	Yes	6589746-1	No Bank Rec			

# BUILDING

## SELECT A REPORT

### BUILDING – RENT REPORTS CUSTOM (A-L)

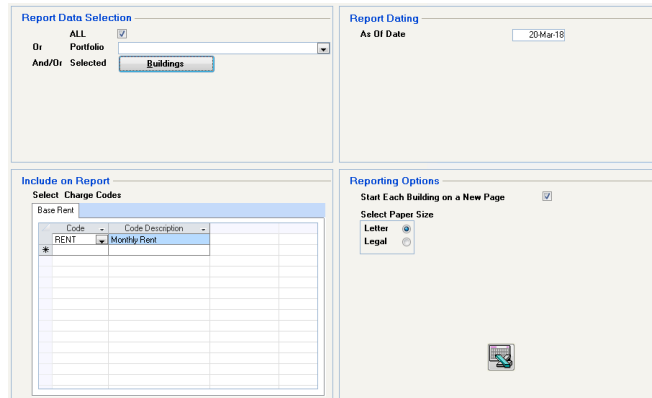
A column has been added to **Rent Roll – FRAGA** to display Tenant Lease Option Code.

Master Rent Roll												By Unit	16-Mar-2018				
												As of:	March 16, 2018				
Building:	Plaza Tower											Operating Expense	Real Estate Taxes	Other Expense	Gross Rents		
Lessee	Unit #	Square Feet	Lease Term From	To	Unit Info Base Rent	Pronated Base Rent Annual	Rent SQ FT /YR	Base Rent Increase	Base Rent Increase Amount	Month /YR	SQ FT /YR	Month /YR	SQ FT /YR	Month /YR	SQ FT /YR	Option	
Bob Newby	0101	500	3/1/2018	2/28/2019	16,780.00	201,360.00	402.72	01-Apr-18	\$575.00						16,780.00	402.72	RNStand

We have added a custom report request- **Tenancy Schedule-Gulf Pacific**.



This report is designed to export to Excel.



This report has columns for Gross Lease Area, Tenant Share Percentage, Lease Expiry, Escalation Date, Rent Per Square Footage, Annual Rent, Lease Term, Options, % Rent Level, Type of Lease, and Comments. The Comments field will display the Lease Detail Notes if you have added notes under **Find Tenant > Lease > Notes/OLE**.

TENANCY SCHEDULE												March 20, 2018
UNIT	TENANT NAME	G.L.A. (Lease)	% SHARE (Lease)	LEASE EXPIRY DATE	ESCALATION DATE	RENT P.S.F.	ANNUAL RENT (Lease)	LEASE TERM	OPTIONS	% RENT LEVEL	TYPE OF LEASE	COMMENTS
<b>Example Building</b>												
0101	Bob Newby	784	38.621%	12/31/2019		\$280.03	\$219,540.00	2 Years				See Notes
0102	National Mortgage	1,246	61.379%	12/31/2018		\$176.20	\$219,540.00	1 Years				
<b>Total Leased / Occupied Area</b>		<b>2,030</b>	<b>100.00%</b>									
0103	Vacant	0										
0104	Vacant	0										
0105	Vacant	0										
0106	Vacant	0										
<b>Sub-Totals for Property: Example Building</b>		<b>2,030</b>	<b>100.00%</b>				<b>\$439,080.00</b>					
<b>Footnotes / Comments</b>												
0101	Bob Newby	Your Lease Notes here.										

*Add Lease Details* Bob Newby Set Default Address

Building	Example	Example Building	Area Leased	0	Rent Step Ups	<input type="checkbox"/>
Floor	4		Override Area Leased	0	Lease Type	
Unit	0401		Caretaker / Manager		Has Land Lease	<input type="checkbox"/>
<input type="button" value="Renew Lease"/>			TenantPay ID		Lease Negotiated Date	
Term	Years: 10	Months: 0	Days: 0	TenantPay LeaseID	000583	% Rent of Gross Sales As Dollars
Starts	01-Jan-2018	Ends	31-Dec-2027	TenantPay Stop Payments	No	Months Of Free Rent
Move In		Move Out				Tenant Inducement \$ Included

**Lease Detail Notes**  
Your Lease Detail Notes here!

**OLE Object**

Source Document

### ***BUILDING – RENT REPORTS – RENT ROLL EXPORT TO EXCEL***

You now have the option to run by **Tenant and/or Unit Type**.

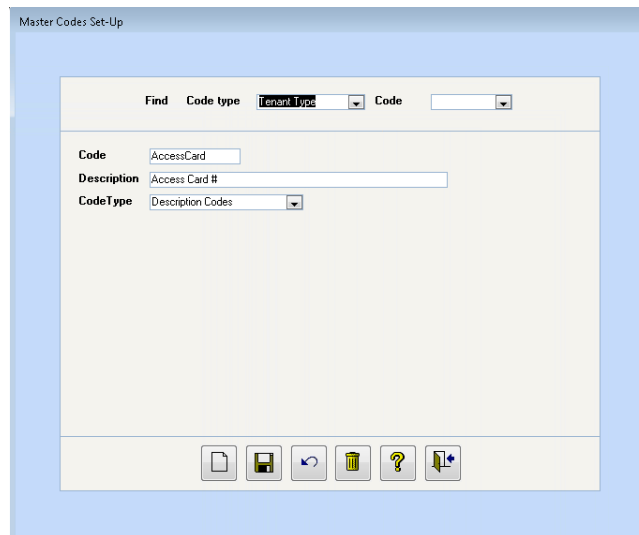
A new field has been added on the **Master Lease Edit** screen to indicate **Tenant Type**:

*Edit Master Lease* Bob Newbie Custom

Begin Month Date = Day of Charge Start Date  Lease Approved  Applicant

Type of Tenant	Regular	Tenant Type	
Lease Type	Annual	<input type="checkbox"/> SubLease	Government City or Municipal Government Federal Government Provincial Local and Regional National
Lease Accounting	Accounts Receivable	<input type="checkbox"/> Tax Exempt	<input checked="" type="checkbox"/> Statement Req
Lease Message		<input type="checkbox"/> Finance Charge Exempt	
Late Payment Type	No Late Fee		

If you need to add a new Tenant Type, go to **System Tasks > Control Codes > Master Codes – select Code Type = Tenant**



The **Unit Type** can be added under the Basic Info Tab under **Find Building > Units**:

Type	Office	Expected Rent
Status	Rented	Market Rent
Usable Area	500	Previous Rent
Rentable Area	500	Vacancy Code
Premise Assessment	\$0.00	Description
Key Code		
Entry Note		
# of Bedrooms		# of Bathrooms 0

## MASTER LISTINGS – BUILDING SUMMARY LISTING

The Building Name field has been increased to equal the size of the Building Name field in the wizard, and will now show 50 characters and no longer cut off the name.

## SUPPLIER

### SUPPLIER-INSURANCE

#### ADD INSURANCE

A field has been added to indicate that a **Certificate of Insurance is Required**.  
A field has been added to indicate that the **Certificate of Insurance has been Received**

*Add Insurance*

Arizona Public Service

History

Insurance Company	<input type="text"/>	Building	<input type="text"/>
Insurance Type	<input type="text"/>	Job	<input type="text"/>
Policy Number	<input type="text"/>	Phase	<input type="text"/>
Expiry Date	<input type="text"/>	SubPhase	<input type="text"/>
Coverage	<input type="text" value="\$0.00"/>	Commitment	<input type="text"/>
Description	<input type="text"/>		
	<input type="checkbox"/> Certificate of Insurance Required		
	<input type="checkbox"/> Certificate of Insurance Received		
	<input type="checkbox"/> Insufficient Coverage		

**SELECT A REPORT**

If you use the *Job Cost Module*, the **Outstanding/Paid Invoices** list can now be generated by Job.

**INSURANCE EXPIRY REPORT**

With the new field on the supplier insurance record, there is now an option to generate the **Insurance Expiry Report** showing Suppliers where a Certificate is required, but has not been received.

<p><b>Report Data Selection</b></p> <p>ALL <input checked="" type="checkbox"/></p> <p>Or Portfolio <input type="text"/></p> <p>And/Or Selected <input type="text" value="Buildings"/></p> <p>And/Or Selected <input type="text" value="Coverage Types"/></p>	<p><b>Report Dating</b></p> <p>As Of <input type="text" value="16-Mar-18"/></p>
<p><b>Include on Report</b></p> <p>Including Suppliers</p> <p>With Insurance Coverage <input checked="" type="radio"/></p> <p>Without Insurance Coverage <input type="radio"/></p> <p>With Expiry Dates of.... <input type="radio"/></p> <p>Certificate Required but Not Received <input type="radio"/></p> <p>With Insufficient Coverage <input type="radio"/></p> <p>Add Time Stamp to Report Date? <input type="checkbox"/></p>	<p><b>Reporting Options</b></p>

## TENANT

### Select a Report-Tenants

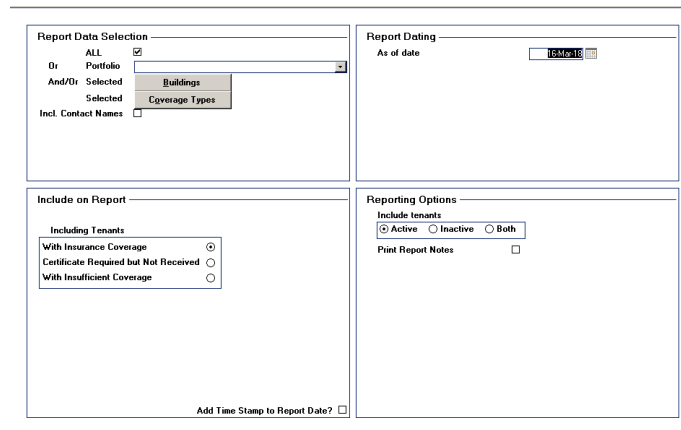
We have added a custom report request, **Tenant Schedule of Rent - Riverpark**.



The report lists tenant charges in the same order as they appear on the Tenant Invoice, and include Parking and Other Spaces Charge. Charges for Parking and Other Spaces Only tenants will not show square footage.

### TENANTS-INSURANCE COVERAGE

With the new field on the Tenant Insurance record, there is now an option to generate a report showing Tenants where a Certificate is required, but has not been received. **Go to Tenants > Select a Report > Tenants > Insurance Coverage**



### TENANT LEDGER – PRE-AUTHORIZED PAYMENTS

When a name is entered in the field “Name on Account if Different Than Tenant Name Above”, this name will automatically be used as the description when entering receipts. The Prepayment name will show in the GL memo description, on the tenant ledger, owner statements and audit reports.



**Edit Pre-Payments**

Bob Newbie

 Lease Building/Unit 

<input checked="" type="radio"/> Pre-Authorized Payment <input type="radio"/> Postdated Cheques	Starting Date <input type="text" value="01-Mar-18"/> Payment based on Tenant Share <input type="text" value="100.00%"/> Payment Amount <input type="text" value="\$16,780.00"/> Ending Date <input type="text"/>	<input type="checkbox"/> History
Name on Account if Different Than Tenant Name Above <input type="text" value="Tamsyn Newbie"/> Bank Name <input type="text" value="BMO"/> Bank Transit Number <input type="text" value="1234567"/> Bank Account Number <input type="text" value="123456789"/> Bank Transaction Code <input type="text" value="402"/>	<input type="checkbox"/> Apply this payment to specific charge codes?	
Date of Last Posted Payment <input type="text" value="01-Mar-18"/>		

Date	Description	Reference	Charges	Payments	Balance
	Balance Forward:				
01-Mar-2018	Comm Rent	Rent Commercial	1	16,780.00	16,780.00
01-Mar-2018	Parking	Parking	1	250.00	17,030.00
01-Mar-2018	Check	Hector Newbie		-250.00	16,780.00
01-Mar-2018	Check	Tamsyn Newbie		-16,780.00	0.00
01-Mar-2018	Check	Key Replacement	78124	-75.00	-75.00
01-Mar-2018	Invoice	Invoice Charge	6	575.00	500.00
02-Mar-2018	KeyCard	Replace Key Card	1710001000	75.00	575.00
Current Balance:					\$575.00

**Desert Property Management**  
 101 East Washington Avenue  
 Phoenix, Arizona

**Tenant Ledger**  
 From Date:  
 To Date: 16-Mar-2018  
 Building: Plaza Tower  
 Unit: 0101  
 Business Phone:  
 Cell Phone:  
 Fax:  
 Move In Date: 01-Mar-2018  
 Move Out Date:

Bob Newbie  
 211 N. Central Avenue #0101  
 Phoenix, AZ 85001

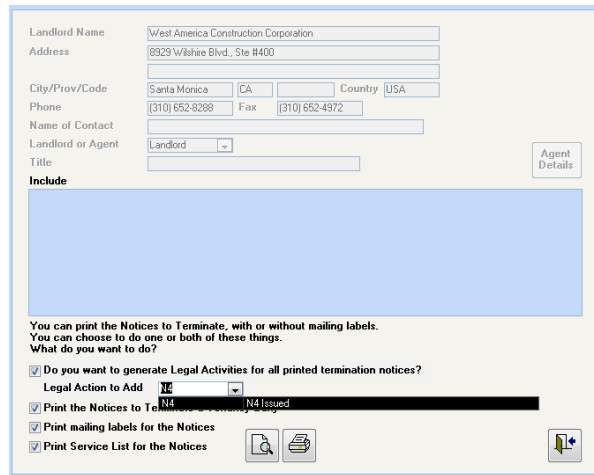
Page: 1

**START A TASK**
**NOTICE OF RENT INCREASE MANITOBA**

The form has been updated with the new address of the **Manitoba Residential Tenancies Branch**

**TERMINATION NOTICES MANITOBA**

We have added an option to the **Manitoba Termination Notices** to be able to generate a Legal Action record for printed termination notices. You may select your choice of legal action code.



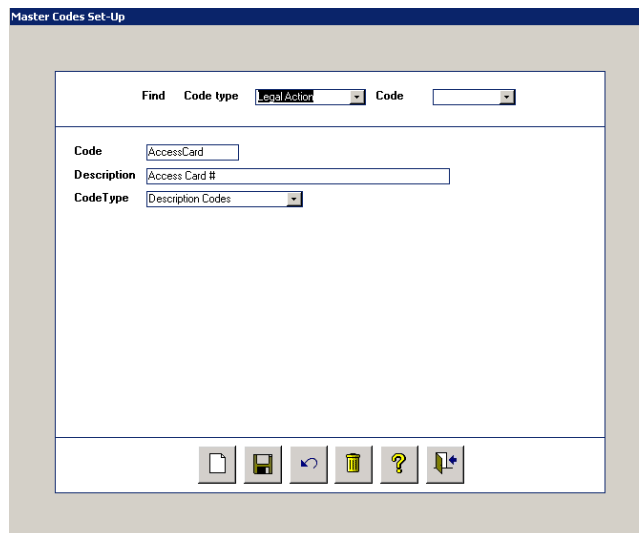
Landlord Name: West America Construction Corporation  
 Address: 8929 Wilshire Blvd., Ste #400  
 City/Prov/Code: Santa Monica CA Country USA  
 Phone: (310) 652-9299 Fax: (310) 652-4972  
 Name of Contact: \_\_\_\_\_  
 Landlord or Agent: Landlord  
 Title: \_\_\_\_\_

**Include**

You can print the Notices to Terminate, with or without mailing labels.  
 You can choose to do one or both of these things.  
 What do you want to do?

Do you want to generate Legal Activities for all printed termination notices?  
 Legal Action to Add: N4  
 Print the Notices to Terminate: N4 Issued  
 Print mailing labels for the Notices  
 Print Service List for the Notices

To create legal action codes, under **System Tasks, Click Control Codes > Master Codes, Choose the Code Type- Legal Action**



Master Codes Set-Up

Find Code type: Legal Action Code: \_\_\_\_\_

Code: AccessCard  
 Description: Access Card #  
 CodeType: Description Codes

## TENANT

### Find Tenant Leases

We have added the new lease template, for the Print Lease Functionality, in compliance with the *Ontario Standard Lease* requirements. If you have not printed a Lease before, please refer to the **Help Files, Index > Print Lease**

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