**Version 4.8
Release Notes**

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This document summarizes the changes in CPL Version 4.8

Overview

This release includes the new Company, Office, & Agent accounts; and minor maintenance issues.

Highlights

- Company, Office, and Agent accounts.
- New account upgrade process.
- New account bill payment options.

Upgrading

No upgrade is required to begin using the system. It is enabled for all users.

A) Company, Office, and Agent accounts

This version introduces the new Agent account, and changes traditional Licenses to Office accounts.

For members who have a single managed portfolio of properties in a single office, there is no functional change. Everything works the same as it always has.

Members who have **more than one managed portfolio** now have **additional options**. The biggest improvement is that you can now add Agent accounts to your Company or Office.

Here are some important notes about Agent accounts.

- An Agent account is for a managing/leasing agent who manages their own portfolio of properties. In cases where a team manages properties, the agent can be a team.
- Each Company account and Office account includes one Agent account by default. This is the initial account you used when you first signed up. If that account has been deleted, your Agent account is the first user that is still active. If the designated Agent account is not the actual agent who manages properties in your company, contact us with a request to change it.
- Authorized users can add additional Agent accounts from the User list, or from Orders and Upgrades. If you have more than one portfolio of properties but have been managing it in a single account, now is the time to add Agents.
- Agents and Users share similarities, in that they both have a logon and authorizations. However, only Agents can have properties and profiles assigned. You can see both Users and Agents from the User list; they are differentiated by their unique icons and color codes.
- Agents have two unique settings worth additional explanation:
    - Color swatch: Each agent can be designated with their own color. On lists, like your Chart of Listings or Owner List, these colors will appear beside the listings and owners they manage.
    - PROMAS Manager ID: Setting this to match the Manager ID in PROMAS will automatically assign imported profiles to this Agent account. This is different from the Company or Office PROMAS Manager ID in your Company or Office account. Request the document: Understanding PROMAS Manager ID's in HERO PM for additional details on this.
- Once a record is assigned to an Agent, only that Agent or the Master Administrator can reassign it. The Master Administrator has full control over all assignments at all times.
- Each Agent and User can be authorized for "ALL" or any number of Agents. Authorized Agents/Users can add, edit, and view records for the agents they are authorized for (determined by their authorization level). Only the Master Administrator can change a user's authorized agents.

B) New account upgrade process

The process to upgrade accounts has been simplified in this version, and more information is displayed during the account upgrade process.

C) New account bill payment options

Companies now have two new options when paying for HERO PM Services: Partial payments and Subscription payments.

Partial Payments

If you need to pay for a bill in multiple payments, the system now provides the option to make a partial payment. The standard due dates and account suspension rules still apply.

Subscription Payments

For members who usually have only their account fees due each month (i.e. you don't normally have personal webmaster, upgrade, or one-time charges), you can now pay these by automated subscription.   Simply choose the subscription option in the payment screen. This will charge your standard monthly payment automatically each month. It does not include one-time or special charges, which still need to be paid – and you will be alerted if this applies. When setting up a subscription, be sure all of your setup and one-time/special charges are already paid so these are not added to your subscription.