



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

CPL RELEASE NOTES VERSION 2.58

JULY 2020

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INTRODUCTION

Welcome to the notes accompanying CPL's 2.58 Release.

This document contains a list of new features and changes implemented in Release 2.58.

We are continuing with the new format established for the 2.55 Release.

Changes and new features have been classified under the following headings:

- Core System
- Financial
- Jobs
- Property Management.

Each Release Item Number is coloured to represent these sections based on the following key:



Core System



Financial



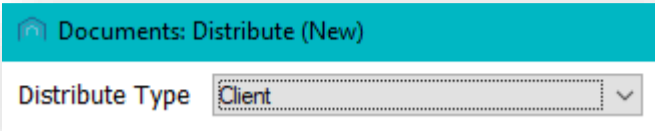
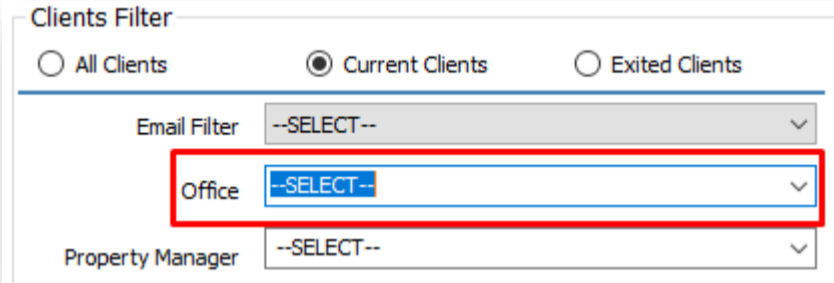
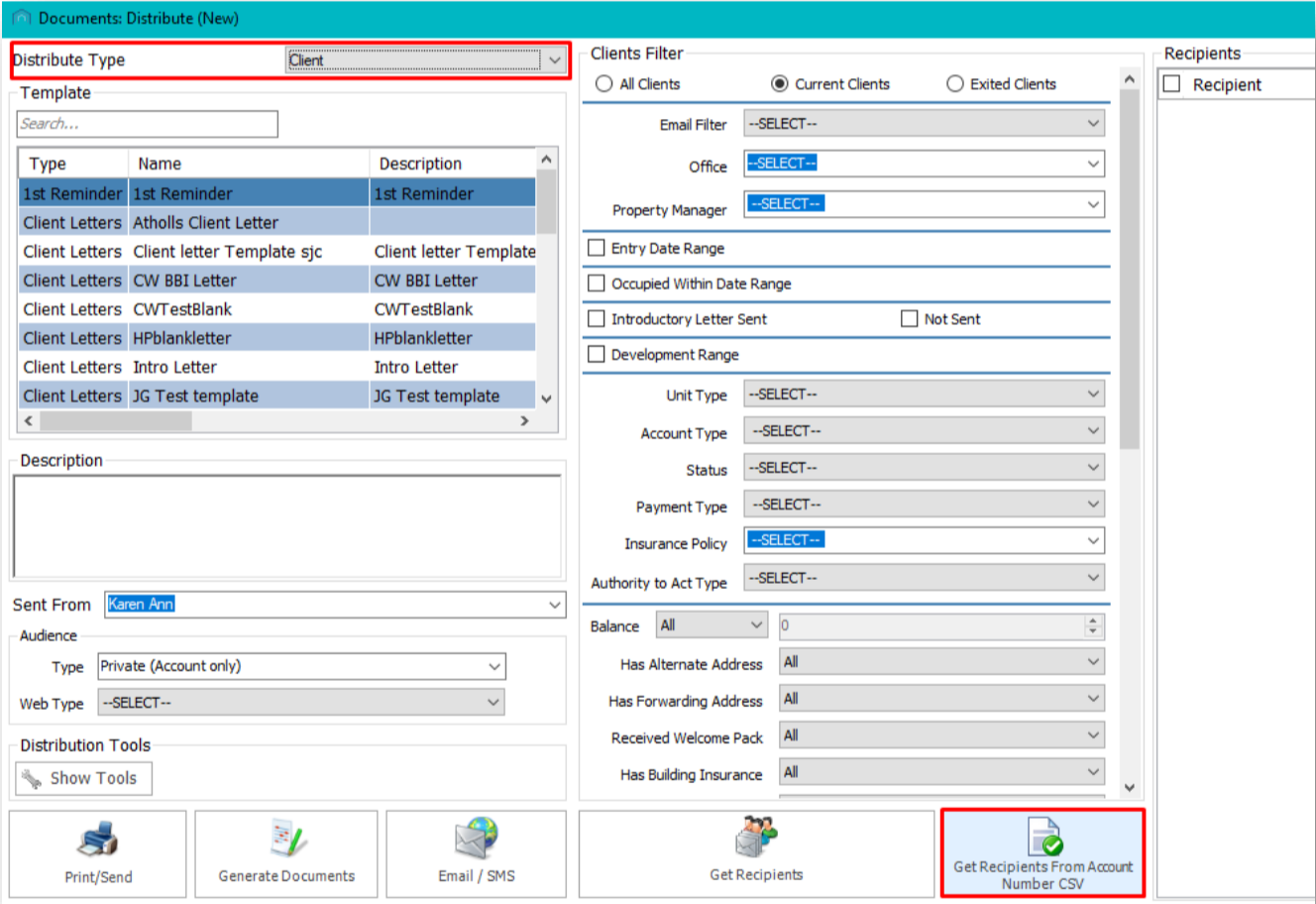
Jobs

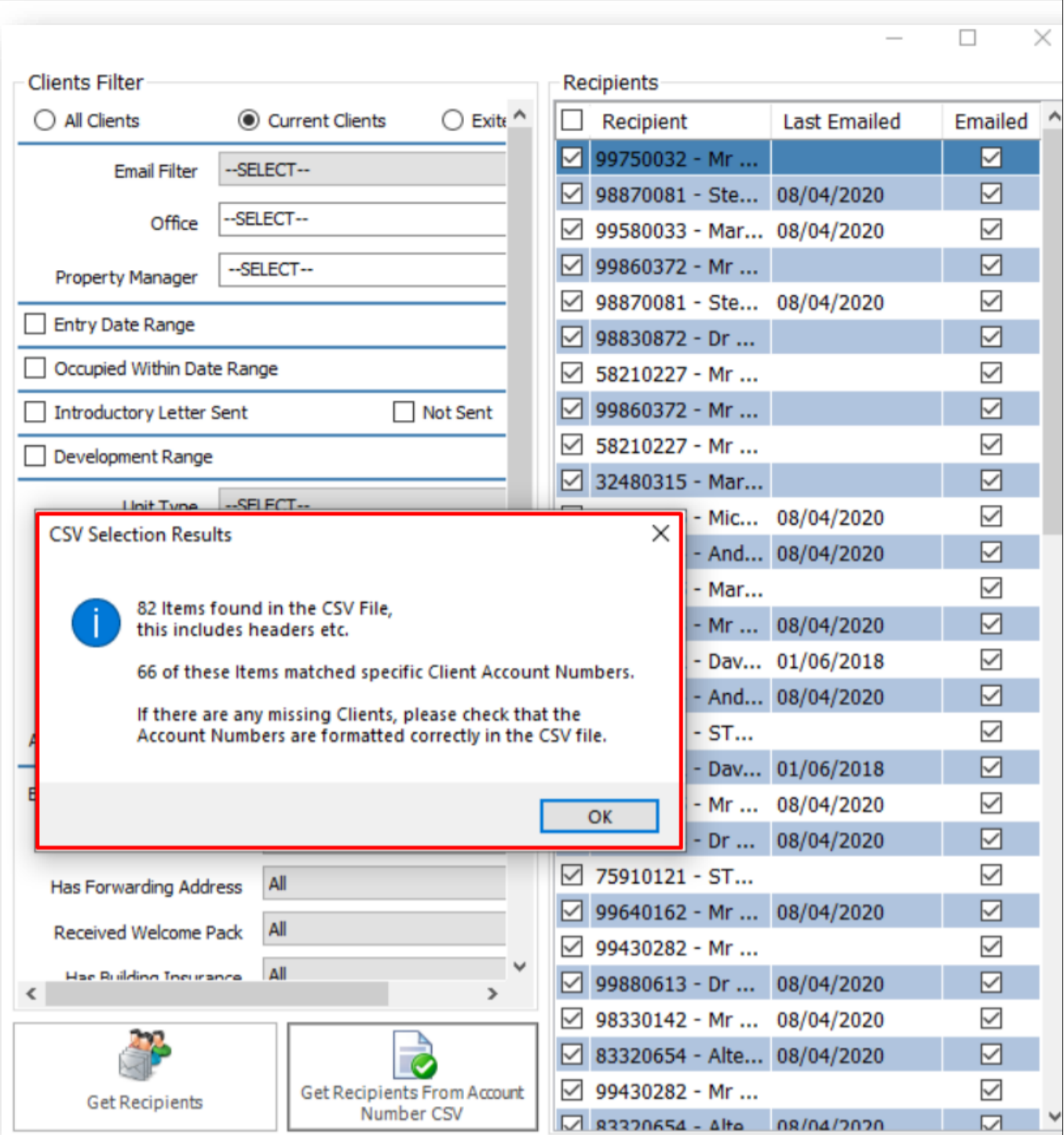


Property Management

2.58 Release Webinar Sessions will be delivered as part of this release and you will receive confirmation of the date and times for these sessions. Recordings of these sessions will be available later in the CPL Knowledge Base.

CORE SYSTEM

Number	Type	Title	Overview
10328	New Feature	Client Document Distribute Screen - new filter and .CSV client upload	<p>A new filter and a new feature have been added to the Document Distribution system within CPL. The new filter enables you to sort your clients by the appropriate office, and the new feature enables you to upload a .CSV file of Client Account Numbers to create your recipients list.</p> <p>In order to use the new filter and upload feature, on the Documents: Distribute (New) screen, first set your Distribute Type filter to Client.</p> <div data-bbox="777 477 1388 599"></div> <p>The new Office filter is available in the Clients Filter section in the middle of the screen.</p> <div data-bbox="777 733 1556 997"></div> <p>In order to use the new client account numbers upload feature, click the icon in the bottom right-hand corner of the Documents: Distribute screen labelled Get Recipients from Account Number CSV. This button will only be available if you have first set your Distribute Type to Client.</p> <div data-bbox="777 1228 2018 2080"></div> <p>This will allow you to browse for and upload your .CSV of client account numbers and have these pulled into the recipients list for distribution.</p>



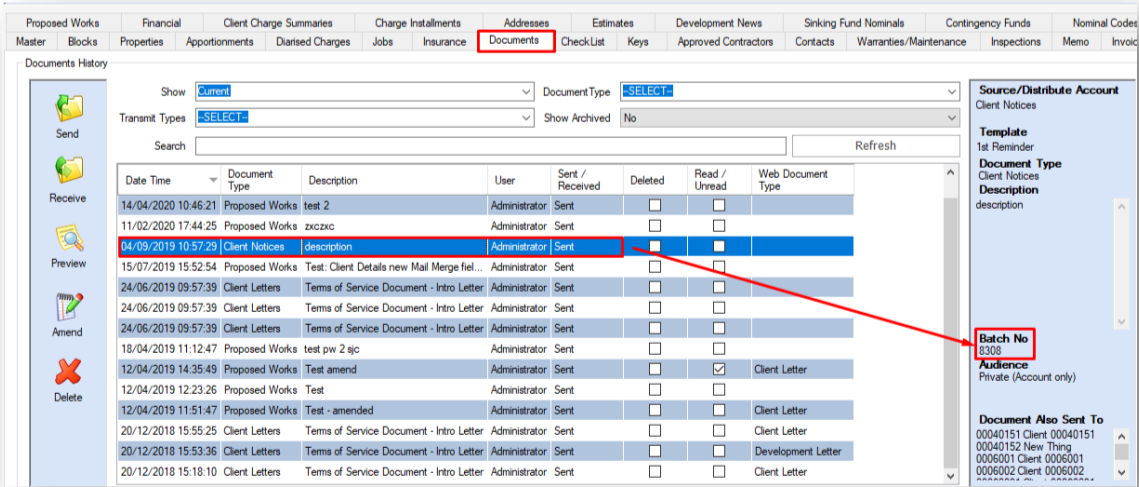
10301

New Feature

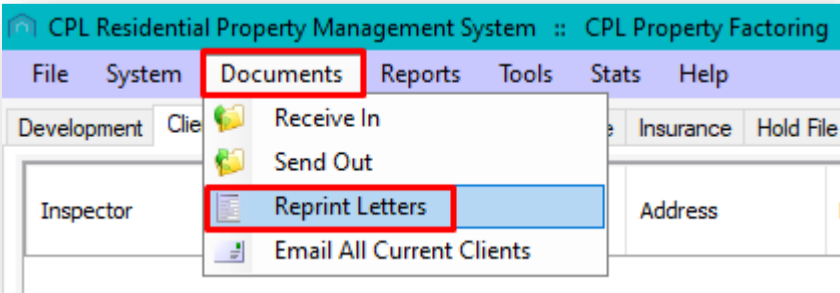
Batch Number added to Documents tab

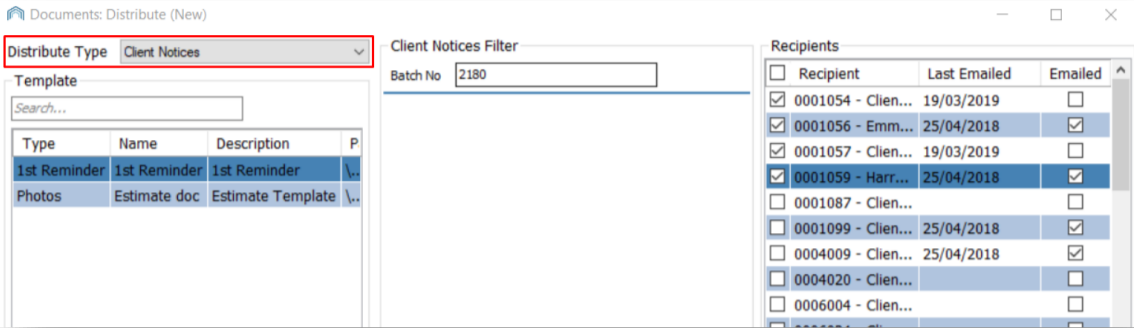
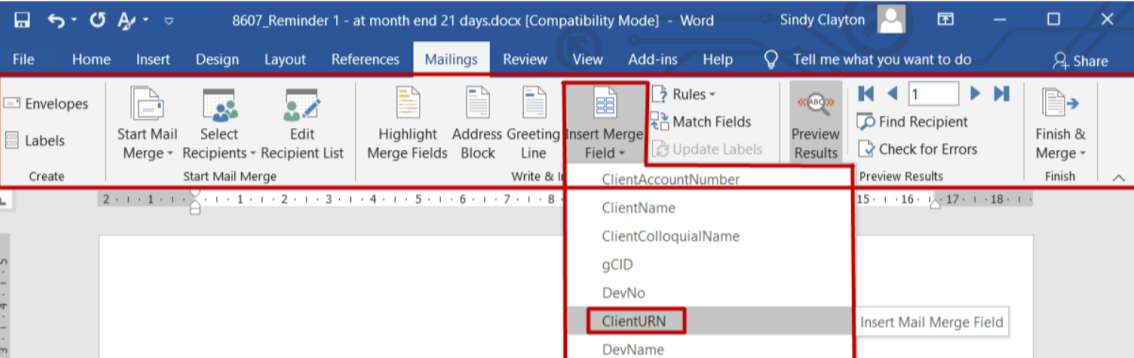

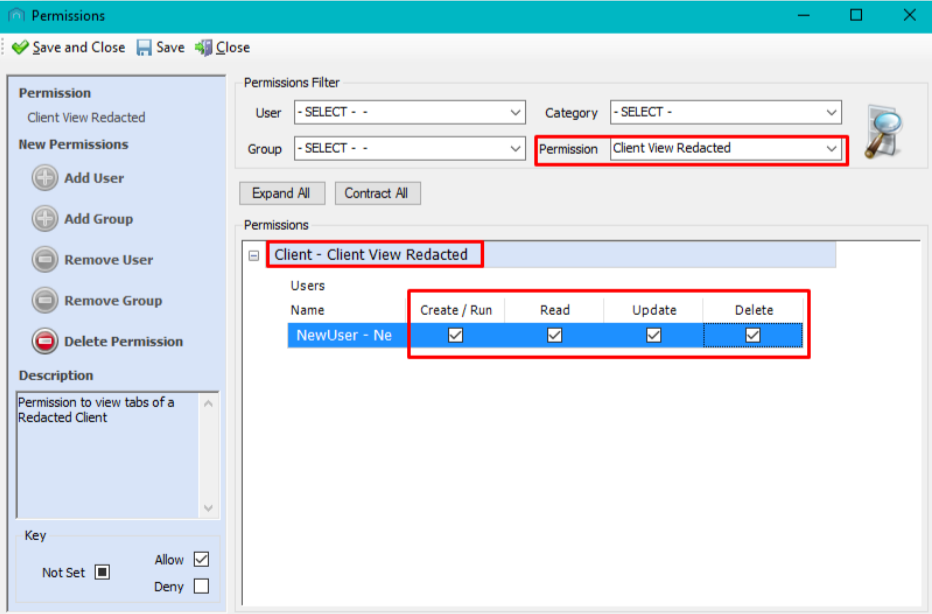
An improvement has been made to the information available on the pin panel in the Documents tab by allowing a Batch Number to be displayed for your prints and emails.

The Batch Number will display in the pin panel corresponding to whichever document has been distributed by print or email that you have highlighted in the grid.



You will be able to use this batch number to help with reversals and reprints via the **Reprint Letters** option under the main **Documents** menu, as well as other areas of CPL.



10340	New Feature	URN added to Client Notices Mail Merge Fields	<p>The Unique Reference Number required for your clients to log into your Client Web Portal is now available as a Mail Merge field to be used in your documents when the Distribute Type is set to Client Notices. If this field is added to your Mail Merge templates, the URN will now be included when contacting your clients and processing your Client Notices and therefore make it easier for them to log onto the Web Portal and pay any arrears.</p> <p>Make sure your Distribute Type field is set to Client Notices:</p> 
			<p>In the Mailing tab in your Word Document, select Insert Merge Field from the top menu:</p> 
			<p>When this mail merge field is added to the document the client's Unique Client Reference Number will display in your communication and make it easier for your them to log into the portal.</p> 
10281	New Feature	Manage what can be seen for Redacted Clients	<p>Further improvements have been made to the way CPL handles clients which have been redacted. You are now able to manage which tabs can be viewed once a client's details have been redacted via a new permission called Client View Redacted.</p> 
			<p>When this permission is granted to a user in CPL, they will be able to see all tabs for a redacted client.</p>

Save

Close

Policy Number

1

Insurance Company

Fixed Insurance Co. One

Excess

100.00

Policy Code

Fxd_Ins_1

Description

Fixed Insurance for

Current Claims

18

Insurance Type

Fixed

Next Renewal

01/01/2020

Delete

☐

Insurance Policy Information

Claim

Clients Covered

Policy Excess Details

Claims Summary

Memos

Documents

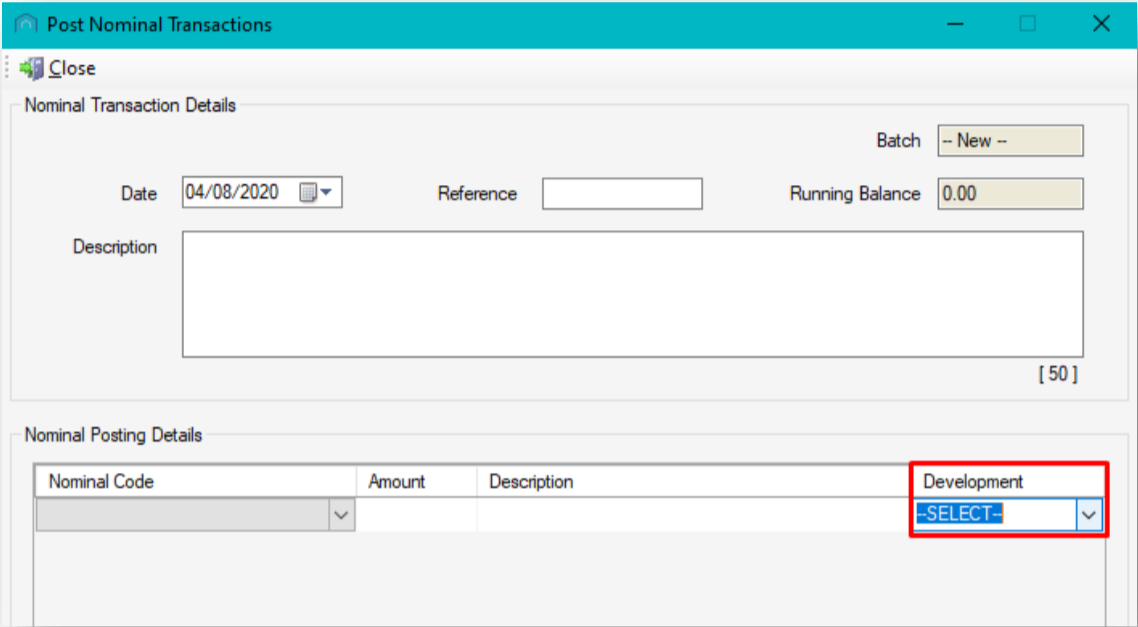
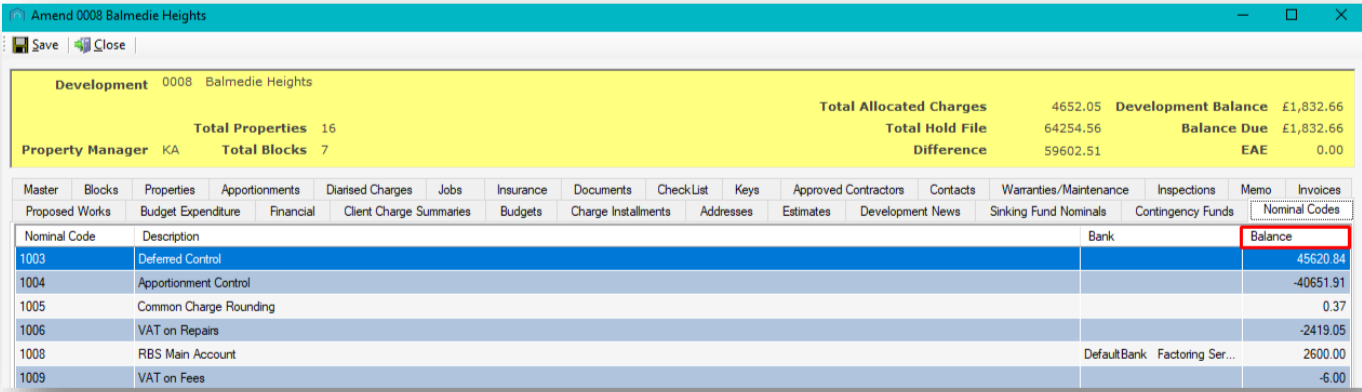
+

Add

✎

Amend

Claim No	Dev No	Dev Name	Loss Date	Description	Status	Client	Peril
112	1108	Added Development	13/06/2019	qwert2.53	Invoice Received	11080071 John ...	Default
111	1116	Ducky Shrewsbury D...	13/06/2019	qwert 2.53	Claim Closed	11160011 Donal...	Default
110	1116	Ducky Shrewsbury D...	13/06/2019	test claim	Estimates Received		Water Le
107	1117	Watches Dev. QTR ...	27/03/2019	guikvgokghckgkcg...	Claim Created	11170011 Seiko	Default
106	1117	Watches Dev. QTR ...	27/03/2019	bxcfxgxforg	Claim Created	11170011 Seiko	Default
105	1117	Watches Dev. QTR ...	27/03/2019	qjhvbknlbjkjbjnkj;	Invoice Received	11170011 Seiko	Default
104	1117	Watches Dev. QTR ...	27/03/2019	jghcvlghvjhvjh	Invoice Received	11170011 Seiko	Default

<div><div><div><div></div><div>CPL SOFTWARE</div><div><small>PARTNERS TO PROPERTY FACTORS & BLOCK MANAGERS</small></div></div><div>FINANCIAL</div></div></div>			
Number	Type	Title	Overview
10411	New Feature	New Auto-Suspend setting for Diarised Charges	<p>The Diarised Charges system has been improved and now incorporates an Auto Suspend function. If this setting is activated it would mean that any Purchase Ledger invoice created by a diarised charge would be placed on suspend and would need to be authorised.</p> <p><i>For more information on this setting and whether this would be useful for your company, please contact CPL Support and quote RPM- 10411.</i></p>
10359	New Feature	Allow Nominal Posting to VAT Controls	<p>A new System Setting has been added which would enable you to post directly to your VAT Control Nominals.</p> <p>If this system setting is not turned on, then the system will act as it does currently and not allow any postings to be made to VAT Control Nominals. If it is turned on then you will be able to post to these.</p> <p><i>For more information on this setting and whether this would be useful for your company, please contact CPL Support and quote RPM- 10359.</i></p>
10381	New Feature	Nominal Posting: Require Development	<p>A new feature has been added to the Nominal accounting system inside CPL. If this setting is activated, all nominal postings would need to be assigned to a Development.</p> <p>In the Post Nominal Transactions screen, a drop-down menu would display in the Nominal Posting Details grid and you would be required to select a Development before being able to post to the nominal.</p> <div></div> <p>With the setting turned off the system would act as it does currently, and would not require you to provide the system with a Development for the Nominal Posting.</p> <p><i>For more information on this setting and whether this would be useful for your company, please contact CPL Support and quote RPM- 10381.</i></p>
10382	New Feature	Development Nominal Codes Tab Additions	<p>This feature introduces improved information on the Nominal Codes tab within the Development screen which will allow you to have more clarity on total amounts and movements between your funds for each development.</p> <p>Previously the grid in the Nominal Codes tab contained columns for:</p> <ul style="list-style-type: none">• Nominal Code• Description• Bank• Balance <div></div> <p>Two new columns have now been added to the grid:</p> <ul style="list-style-type: none">• Credit (CR)• Debit (DR)

Totals are displayed at the bottom of the new **Credit** and **Debit** columns and also for the **Balance** column.

Amend 1118 Tree Houses Mthly

SaveClose

Development1118Tree Houses Mthly

Total Properties3

Total Blocks1

Property ManagerCM

Total Allocated Charges0.00

Total Hold File601.66

Difference601.66

Development Balance£1,268.00

Balance Due£1,268.00

EAE0.00

MasterBlocksPropertiesApportionmentsDiarsed ChargesJobsInsuranceDocumentsCheckListKeysApproved ContractorsContactsWarranties/MaintenanceInspectionsMemoInvoices

Proposed WorksFinancialClient Charge SummariesCharge InstallmentsAddressesEstimatesDevelopment NewsSinking Fund NominalsContingency FundsNominal Codes

Nominal Code	Description	Bank	Credit	Debit	Balance
1003	Deferred Control		0.00	95.01	95.01
1004	Apportionment Control		0.00	200.00	200.00
1006	VAT on Repairs		0.00	40.00	40.00
1009	VAT on Fees		-1.67	0.00	-1.67
1012	Purchase Ledger Control		-240.00	0.00	-240.00
1014	Management Fees		-22.00	0.00	-22.00
1017	Administration Fees	JT94938394 JackTest02	-10.00	0.00	-10.00
1024	Dev8Test	1024 Dev 8 Nominal	0.00	22.00	22.00
Maintenance Fund	Maintenance Fund		-83.34	0.00	-83.34

Credit Total£357.01 CR

Debit Total£357.01 DR

Balance Total£0.00 CR

10384

New Feature

The Contingency Funds description will be used as the Charge File description

The Contingency fund system has been updated. The **Name** you used when setting up the Contingency fund will also be used when the charge is raised on your clients' accounts and entered onto their Charge File.

You can see this Contingency fund has been named **New Roof Fund**:

Amend 1118 Tree Houses Mthly

SaveClose

Development1118Tree Houses Mthly

Total Properties3

Total Blocks1

Property ManagerCM

Total Allocated Charges0.00

Total Hold File601.66

Difference601.66

Development Balance£1,268.00

Balance Due£1,268.00

EAE0.00

MasterBlocksPropertiesApportionmentsDiarsed ChargesJobsInsuranceDocumentsCheckListKeysApproved ContractorsContactsWarranties/MaintenanceInspectionsMemoInvoices

Proposed WorksFinancialClient Charge SummariesCharge InstallmentsAddressesEstimatesDevelopment NewsSinking Fund NominalsContingency FundsNominal Codes

Contingency Funds

NameNew Roof Fund

Charge Date CodeMonthly Monthly

Annual Amount1000.00

Apportionment2 Equal Split

Nominal CodeMaintenance Fund Maintenance Fund

Add New Fund Details

Name	Charge Date Code	Apportion	Annual Amount	Nominal Code
------	------------------	-----------	---------------	--------------

Once **Process Contingenices** has been run in Client Global you will see below that the resulting Charge Transaction **Description** is the same as the Contingency Fund **Name**.

Client Account: 11180011 / Ash Tree

SaveClose

Account Number11180011

Client NameAsh Tree

Property ManagerBette Midler

Payment TypeNormal

Float Due£200.00

Float Paid£0.00

Float O/S£200.00

StatusNormal

Current Balance£1,268.00

Charge Balance£36.11

Balance Due£1,268.00

PW Balance£100.00

Unit TypeTenement

Activity

Diarsed Charges

Web Portal Tracking

Invoice Preview

AccountAddresses ActivityTransaction ActivityFloat TransactionsCharge TransactionCredit ControlMemosLetters DocumentsAllocationsMaps/DirectionsEstimated ChargesCourt Ledgers

Charge Transaction Information

Trans Date	Batch/DBN	Description	PL Account	Amount	Invoice	Excluded	DType	DR
01/09/2019	8651/28318165	Contingency Fund - New Roof Fund		27.78				
14/02/2020	8450/28317527	Administration Charge for Late Payment		8.33				

10233

Change

Budget dates and budget invoice dates anomaly

Previously an issue existed where different stages of the budget invoice process were showing dates which appeared to be out of sync with the dates being run.

These inconsistencies were showing up in the following areas:

- Charge dates in the **Budget** tab for the Development were incorrectly labelled as the **From** date.
- Transaction Activity description on the client account was displaying the incorrect date.
- Client sales for a Budgeted Development was causing incorrect parties to be charged for amounts because of the inaccurate dates.

Work has now been completed to resolve the incorrect dates displaying.

CPL Release Notes V2.58 v1.1

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<div><div><div><div>CPL SOFTWARE</div><div>PARTNERS TO PROPERTY FACTORS & BLOCK MANAGERS</div></div><div>JOBS</div></div></div>																																																																										
10258	Feature	New Document property for Estimate Quotes	<div><div>Overview</div><div><p>A new Distribution Type has been added to the Document Distribution screen inside CPL. This new Distribute Type, Estimate Request Quotes can be used to select Mail Merge templates you have created relating to Estimate Requests, such as cost negotiations or correspondence about estimates in general.</p><p>The Document Distribute screen works as before, but with the new Distribution Type now available in the drop-down menu.</p><div><div><div>Documents: Distribute (New)</div><div><div><div>Distribute Type</div><div>Estimate Request Quotes</div></div><div>Template</div><div><div>Search...</div><div><table><tr><th>Type</th><th>Name</th><th>Descripti</th></tr><tr><td>Estimate Requested</td><td>Estimate Requested</td><td>Estimate</td></tr></table></div></div></div><div><div>Estimate Request Quotes Filter</div><div><div>Development</div><div>--SELECT--</div></div><div><div>Show All</div><div><input type="checkbox"/></div></div><div><div>Estimate Request</div><div>--SELECT--</div></div><div><div>Estimate Quote</div><div></div></div></div><div><div>Recipients</div><table><tr><th><input type="checkbox"/></th><th>Recipient</th><th>Last Emailed</th><th>Emailed</th></tr><tr><td><input type="checkbox"/></td><td>1 - HandyMan 1...</td><td>31/07/2018</td><td><input checked="" type="checkbox"/></td></tr><tr><td><input type="checkbox"/></td><td>2 - Gas Compa...</td><td>31/07/2018</td><td><input checked="" type="checkbox"/></td></tr><tr><td><input type="checkbox"/></td><td>3 - Cleaning Co...</td><td></td><td><input checked="" type="checkbox"/></td></tr><tr><td><input type="checkbox"/></td><td>4 - Cleaning Co...</td><td></td><td><input checked="" type="checkbox"/></td></tr><tr><td><input type="checkbox"/></td><td>5 - Gas Compa...</td><td></td><td><input checked="" type="checkbox"/></td></tr><tr><td><input type="checkbox"/></td><td>6 - HandyMan 1...</td><td>31/07/2018</td><td><input checked="" type="checkbox"/></td></tr></table></div></div></div></div><div><p>There is also enhanced functionality available when Estimate Request Quotes are being sent by email. Both the email body and the subject line are customisable using Keywords for email templates. For example, the Development Name or the Contractor Name could now be picked up to be used in the subject line of an email.</p><div><div>Email Properties</div><div><div>Save</div><div>Close</div></div><div><div>Email Properties</div><div><div>Email Type</div><div>Estimate Instruction</div></div><div><div>Subject</div><div>Estimate Instruction - %CONTRACTORNAME%</div></div></div></div></div><div><p>These email templates are able to be edited from clicking on System, and selecting System Parameter and then selecting Email Properties from the resulting drop-down menu.</p><div><div>CPL Residential Property Management System :: CPL Property Factoring / (DEV)#RE</div><div><div>File</div><div>System</div><div>Documents</div><div>Reports</div><div>Tools</div><div>Stats</div><div>Help</div></div><div><div>Develop</div><div>Inspect</div></div><div><div>System Parameter</div><div>Documents</div><div>Testing</div></div><div><div>Accounting Basis</div><div>Allocation</div><div>Apportionment Fees</div><div>Bank Nominals</div><div>Budget Headings</div><div>Charge Date Codes</div><div>Charge Headings</div><div>Charge Types</div><div>Check List Items</div><div>Contact Types</div><div>Credit Control Types</div><div>Email Properties</div><div>Estimate Inflation Rates</div></div></div></div><div>Select the template you wish to edit from the list which appears.</div></div>	Type	Name	Descripti	Estimate Requested	Estimate Requested	Estimate	<input type="checkbox"/>	Recipient	Last Emailed	Emailed	<input type="checkbox"/>	1 - HandyMan 1...	31/07/2018	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2 - Gas Compa...	31/07/2018	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3 - Cleaning Co...		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4 - Cleaning Co...		<input checked="" type="checkbox"/>	<input type="checkbox"/>	5 - Gas Compa...		<input checked="" type="checkbox"/>	<input type="checkbox"/>	6 - HandyMan 1...	31/07/2018	<input checked="" type="checkbox"/>																																					
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10147	New Feature	Dashboard - Overdue Development warranty Dates - additional columns	<div><div><p>The Overdue Development Warranty Dates Dashboard card has been updated to provide additional information. Previously the card only showed the PL Account, the Development, the Property Manager, the Description of the Other Date added for the warranty and any Notes you had added.</p><div><div><div>Overdue Development Warranty Dates</div><div>You have 39 Overdue Development Warranty dates</div><div>Your staff have 0 Overdue Development Warranty dates</div></div><div><table><tr><th>Date</th><th>PL Account</th><th>Development</th><th>Property Manager</th><th>Description</th><th>Notes</th></tr><tr><td>17/01/2020</td><td>Electrician 101</td><td>0008 - Balmedie Heights</td><td>Karen Ann</td><td>3A. January Inspection</td><td></td></tr><tr><td>02/07/2019</td><td>Insurance Compan...</td><td>1108 - Tay Gardens</td><td>Karen Ann</td><td>Added 2.53-3</td><td></td></tr><tr><td>01/07/2020</td><td>Electrician 101</td><td>0008 - Balmedie Heights</td><td>Karen Ann</td><td>Lift inspection due</td><td></td></tr><tr><td>01/02/2019</td><td>Electrician 101</td><td>1101 - Bakersfield Heights</td><td>Karen Ann</td><td>added Warranty date</td><td>this is a note added</td></tr><tr><td>21/04/2020</td><td>Insurance Compan...</td><td>0159 - The Fire Station</td><td>Karen Ann</td><td>Arrange new inspection with PL Account.</td><td></td></tr></table></div></div></div><div><p>The new updated card will also show warranty Contract Numbers and Warranty Names in new columns which have been added to the card.</p><div><div><div>Overdue Development Warranty Dates</div><div>You have 34 Overdue Development Warranty dates</div><div>Your staff have 0 Overdue Development Warranty dates</div></div><div><div>Development Warranty Dates</div><div>There are 4 Jobs Overdue for Warranty Dates</div><div>There are 23 non actioned In-Tray Files</div></div><div><div>You have 34 Overdue Development Warranty Dates</div><table><tr><th>Date</th><th>Contract Number</th><th>Warranty Name</th><th>PL Account</th><th>Development</th></tr><tr><td>01/08/2018</td><td>9</td><td>Insurance Com...</td><td>Insurance Compan...</td><td>1111 - Developers Glasgow Development</td></tr><tr><td>03/08/2018</td><td>1235</td><td></td><td>HandyMan 101</td><td>1109 - Cereal Edinburgh Development</td></tr><tr><td>05/08/2018</td><td>1</td><td></td><td>HandyMan 101</td><td>1102 - Test 2 World</td></tr><tr><td>15/09/2018</td><td>6</td><td>Handy_sjc</td><td>Handy_sjc</td><td>1111 - Developers Glasgow Development</td></tr><tr><td>15/09/2018</td><td>7</td><td>Handy_sjc</td><td>Handy_sjc</td><td>1111 - Developers Glasgow Development</td></tr><tr><td>22/09/2018</td><td>5</td><td>Handy_sjc</td><td>Handy_sjc</td><td>1111 - Developers Glasgow Development</td></tr></table></div></div></div></div>	Date	PL Account	Development	Property Manager	Description	Notes	17/01/2020	Electrician 101	0008 - Balmedie Heights	Karen Ann	3A. January Inspection		02/07/2019	Insurance Compan...	1108 - Tay Gardens	Karen Ann	Added 2.53-3		01/07/2020	Electrician 101	0008 - Balmedie Heights	Karen Ann	Lift inspection due		01/02/2019	Electrician 101	1101 - Bakersfield Heights	Karen Ann	added Warranty date	this is a note added	21/04/2020	Insurance Compan...	0159 - The Fire Station	Karen Ann	Arrange new inspection with PL Account.		Date	Contract Number	Warranty Name	PL Account	Development	01/08/2018	9	Insurance Com...	Insurance Compan...	1111 - Developers Glasgow Development	03/08/2018	1235		HandyMan 101	1109 - Cereal Edinburgh Development	05/08/2018	1		HandyMan 101	1102 - Test 2 World	15/09/2018	6	Handy_sjc	Handy_sjc	1111 - Developers Glasgow Development	15/09/2018	7	Handy_sjc	Handy_sjc	1111 - Developers Glasgow Development	22/09/2018	5	Handy_sjc	Handy_sjc	1111 - Developers Glasgow Development
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15/09/2018	7	Handy_sjc	Handy_sjc	1111 - Developers Glasgow Development																																																																						
22/09/2018	5	Handy_sjc	Handy_sjc	1111 - Developers Glasgow Development																																																																						

10369

New Feature

New System Setting for Warranty Dates screen

A new System Setting has been created which impacts the Warranties/Maintenance Contracts module. There is currently the capacity, within the **Other Dates** area to add dates related to your warranty or maintenance contract.

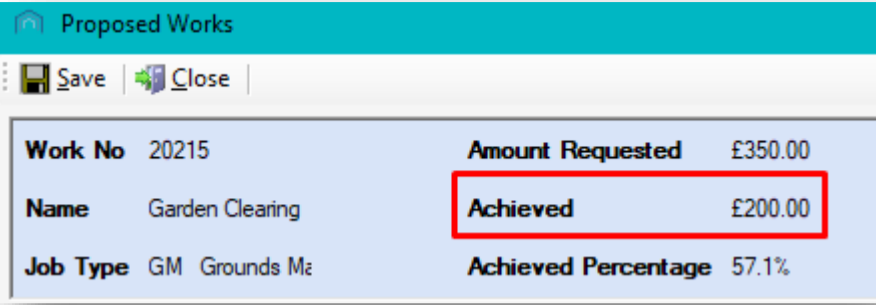
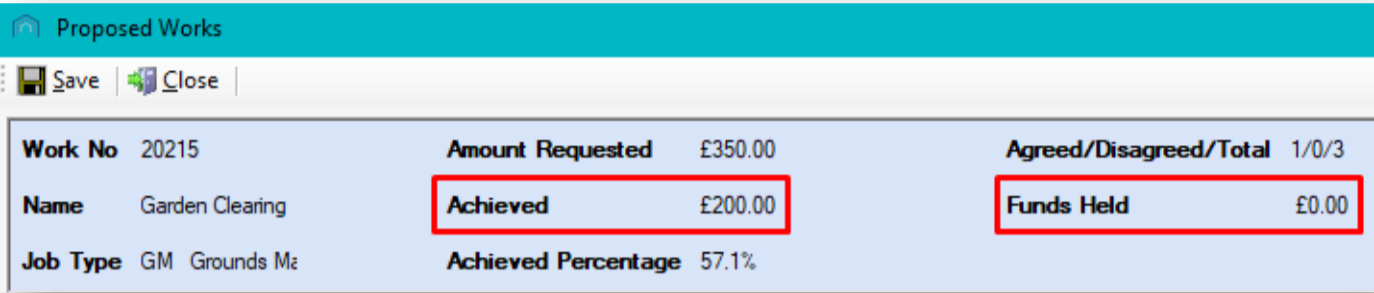
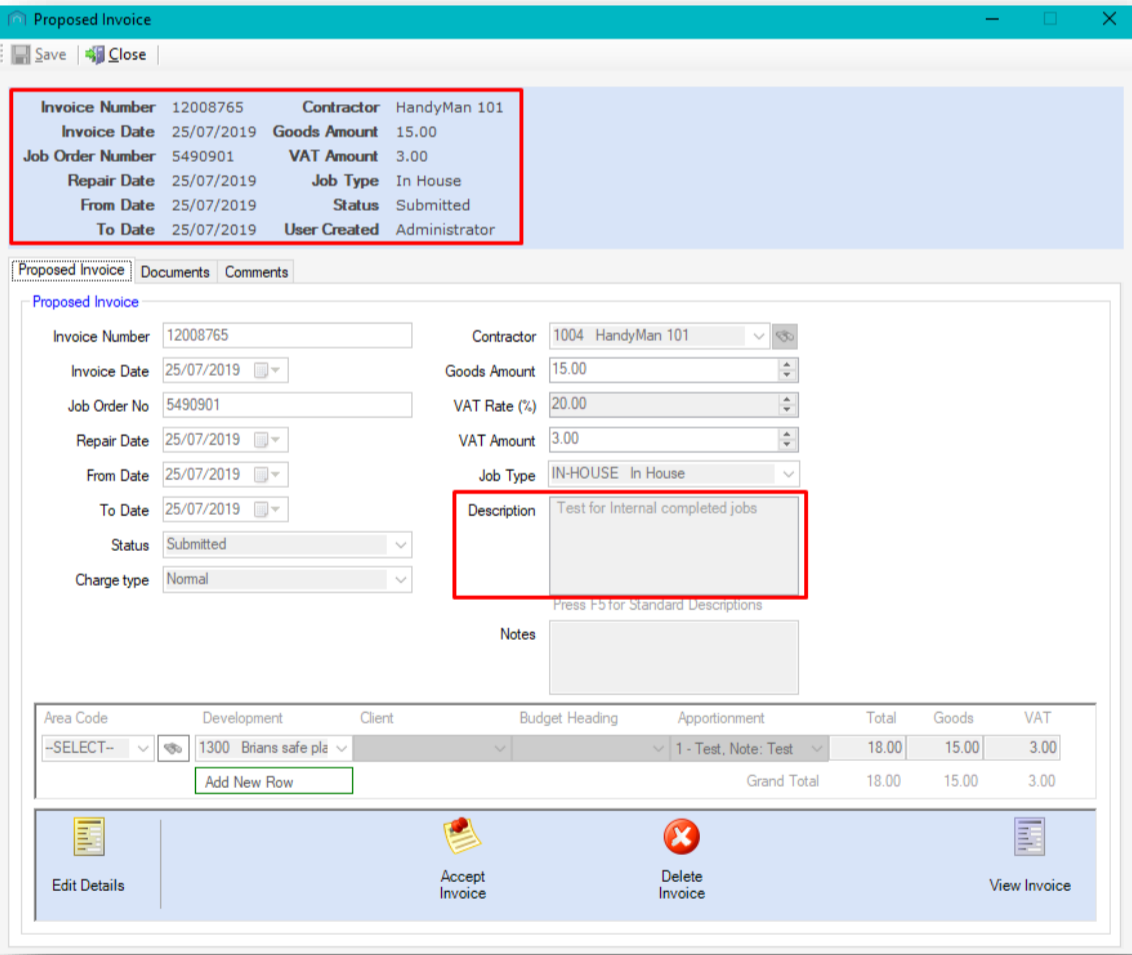
There is also the option to create a job to link to this date.

The new setting is called **WarrantyDatesAllowJobsWithoutInTrayFile** and allows for the **Create Job** button to be disabled if there is no linked In-Tray file for the selected warranty date.

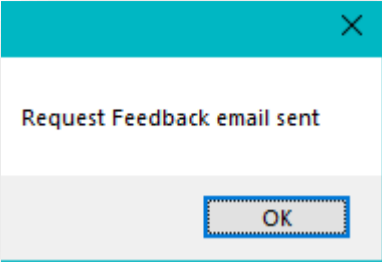
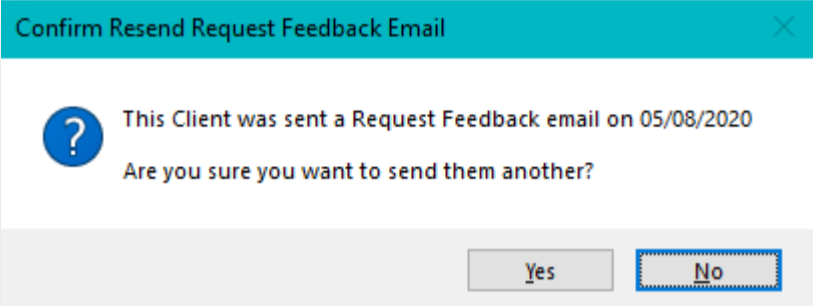
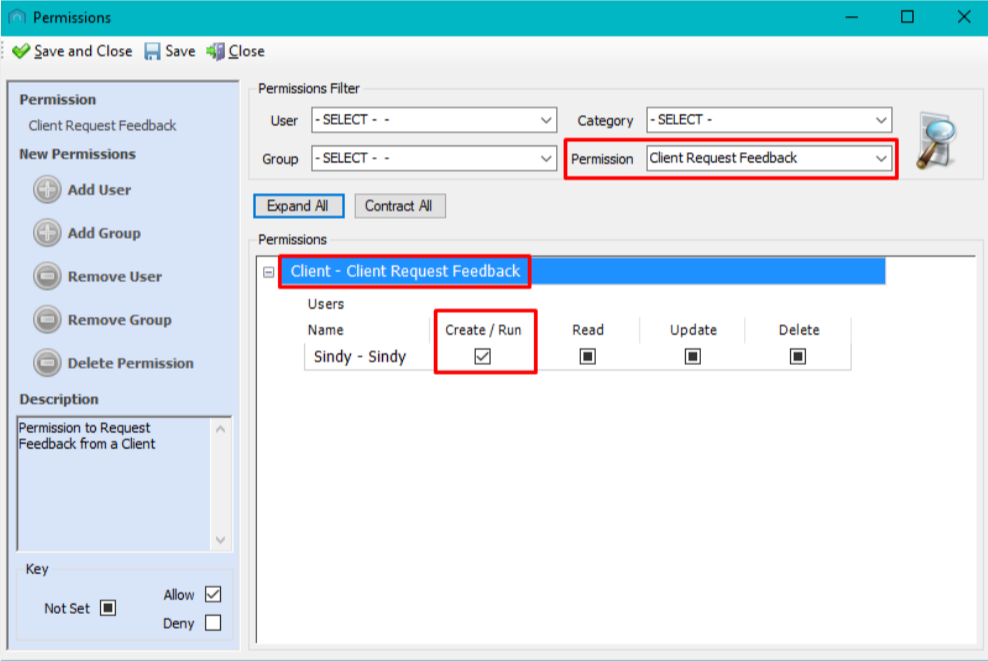
This setting has two statuses:

- Off** will disable the **Create Job** button as described above, and
- On** will allow the system to act as it does currently, in that it will *not* require a linked In-Tray document relating to the warranty for the **Create Job** button to be available.

For more information on this setting and whether this would be useful for your company, please contact CPL Support and quote RPM-10369.

10278	New Feature	New Funds Held Total for Proposed Works	<div><p>Previously the only total available in the pin panel for a proposed work was for funds achieved, whether any had been released or not.</p><div></div><p>A new rolling total has been added to the pin panel at the top of the Proposed Works screen that will display the total funds held for a Proposed Work prior to their release. Once funds have been released, the Funds Held total will show as zero, as funds are no longer held in Proposed Works.</p><p>In the example below you will note that although £200.00 has been paid towards the proposed work, the Funds Held total is £0.00 because this collected amount has been released.</p><div></div></div>
10380 and 10406	Change	Changes to Proposed Invoices screen	<div><p>Previously, depending on screen resolution, some clients were experiencing difficulty viewing the icons at the foot of the Proposed Invoices screen. A scroll bar has been added to this screen to resolve this.</p><p>There was also an issue reported where if a lengthy description was present this also made the icons at the bottom of the screen difficult to see. To resolve this the description will no longer be present in the pin panel at the top of the screen. The description will still be able to be viewed in the Description field itself on the page.</p><div></div></div>

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			<div data-bbox="741 210 1098 454">  </div> <p>The system will log the date this email has been sent and when the request feedback option is clicked again for this client, a Confirm Resend Request Feedback Email pop-up message will appear showing the date the previous feedback was requested and asking if you would like to go ahead with this new request.</p> <div data-bbox="741 652 1501 937">  </div> <p>Clicking No will cancel the operation, clicking Yes will send another feedback request email to the client.</p> <p>The system will Log when the email was sent and warn the user if the request for feedback has been sent before, telling the user the date/ time it was last sent and to confirm if they want to send it again.</p> <p>If you wish, you can restrict access to who is able to use the request feedback option by granting or denying a new permission called Client Request Feedback.</p> <div data-bbox="741 1267 1665 1884">  </div> <p>If a user does not have permission then the Request Feedback button will be greyed out.</p> <p>It is possible to set the default number of days before a user is asked to confirm when clicking to request feedback. Contact CPL Support and they would be able to do this for you. If a specific number of days is not set then then the user will be asked to confirm all requests after the first request. The date of the previous request will always be logged and listed on the confirmation pop-up.</p>
10375	New Feature	New System Setting for Green Fees	<p>The Green Fees system inside CPL has been updated by adding a new System Setting called Green Fee Run For New Owners.</p> <p>This new setting will allow you to choose between the following two options:</p> <ul style="list-style-type: none"> When the setting is turned on, a Green Fee will be raised against the client account regardless of whether they have already received an invoice or not. When the setting is turned off, the system will only raise a Green Fee if the client has previously been invoiced. <p><i>For more information on this setting and whether this would be useful for your company, please contact CPL Support and quote RPM- 10375.</i></p>
10450	Change	Budget Expenditure Tab Removed	<p>The Budget Expenditure tab has been removed from the Development screen as it is no longer required. The same information is available for each specific budget on the Budgets tab, along with the reports which can be run from any specific budget screen.</p> <p>In addition to allowing you to set budgets up, amend them, lock them and copy them, the Budgets tab will allow you to select a current or previous budget and expand the schedules to view all budget items and amounts under each property within the development. This was information available from the previous Budget Expenditure tab.</p>

Master
Blocks
Properties
Apportionments
Disarised Charges
Jobs
Insurance
Documents
CheckList
Keys
Approved Contractors
Contracts
Warranties/Maintenance
Inspections
Memo
Invoices

Proposed Works
Financial
Client Charge Summaries
Budgets
Charge Installments
Addresses
Estimates
Development News
Sinking Fund Nominals
Contingency Funds
Nominal Codes

Add
 Lock
 Amend
 Copy

Budgets

Year	Start	End	Locked
1	01/01/2015	31/03/2016	<input checked="" type="checkbox"/>
2	01/04/2016	31/03/2017	<input checked="" type="checkbox"/>
3	01/04/2017	31/03/2018	<input checked="" type="checkbox"/>
4	01/04/2018	31/03/2019	<input checked="" type="checkbox"/>
5	01/04/2019	31/03/2020	<input checked="" type="checkbox"/>

Budget Summary

- Schedule Name : Dev 0001 Year 4 Schedule 1 (31 items) Apportioned Amount £47.15
- Schedule Name : Dev 0001 Year 4 Schedule 2 (39 items) Apportioned Amount £8571.21

Budget Editor

Save and Close
 Save
 Close
 Anticipated Expenditure Report
 Estimated Budget Report
 Annual Budget Report

Development 1 The Crescents - Budgeted Mthly
Period From 01 April 2018
Period To 31 March 2019
Budget Year Number 4

Schedule Information

Schedule ID	Name	Apportionment
573	Dev 0001 Year 4 Schedule 1	owners only
574	Dev 0001 Year 4 Schedule 2	all properties

Budget Item Information

Item ID	Budget Header Name
1658	Admin Fee
1659	Factoring Fee

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