CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

CPL RELEASE NOTES VERSION 2.58

JULY 2020

CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS & BLOCK MANAGERS

CONTENTS

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

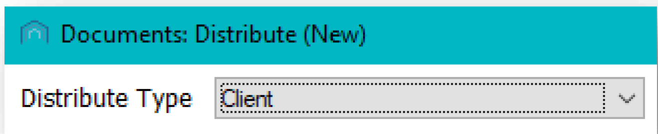
Property Management

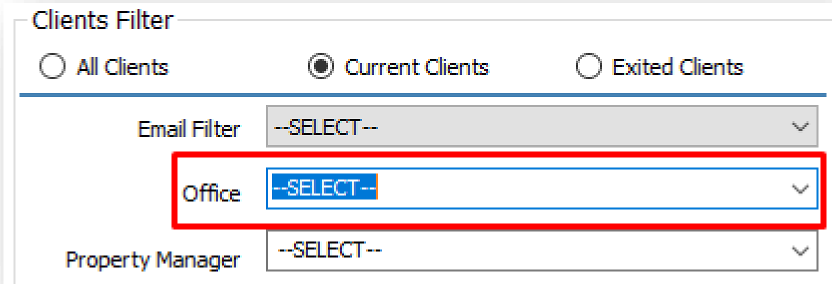
2.58 Release Webinar Sessions will be delivered as part of this release and you will receive confirmation of the date and times for these sessions. Recordings of these sessions will be available later in the CPL Knowledge Base.

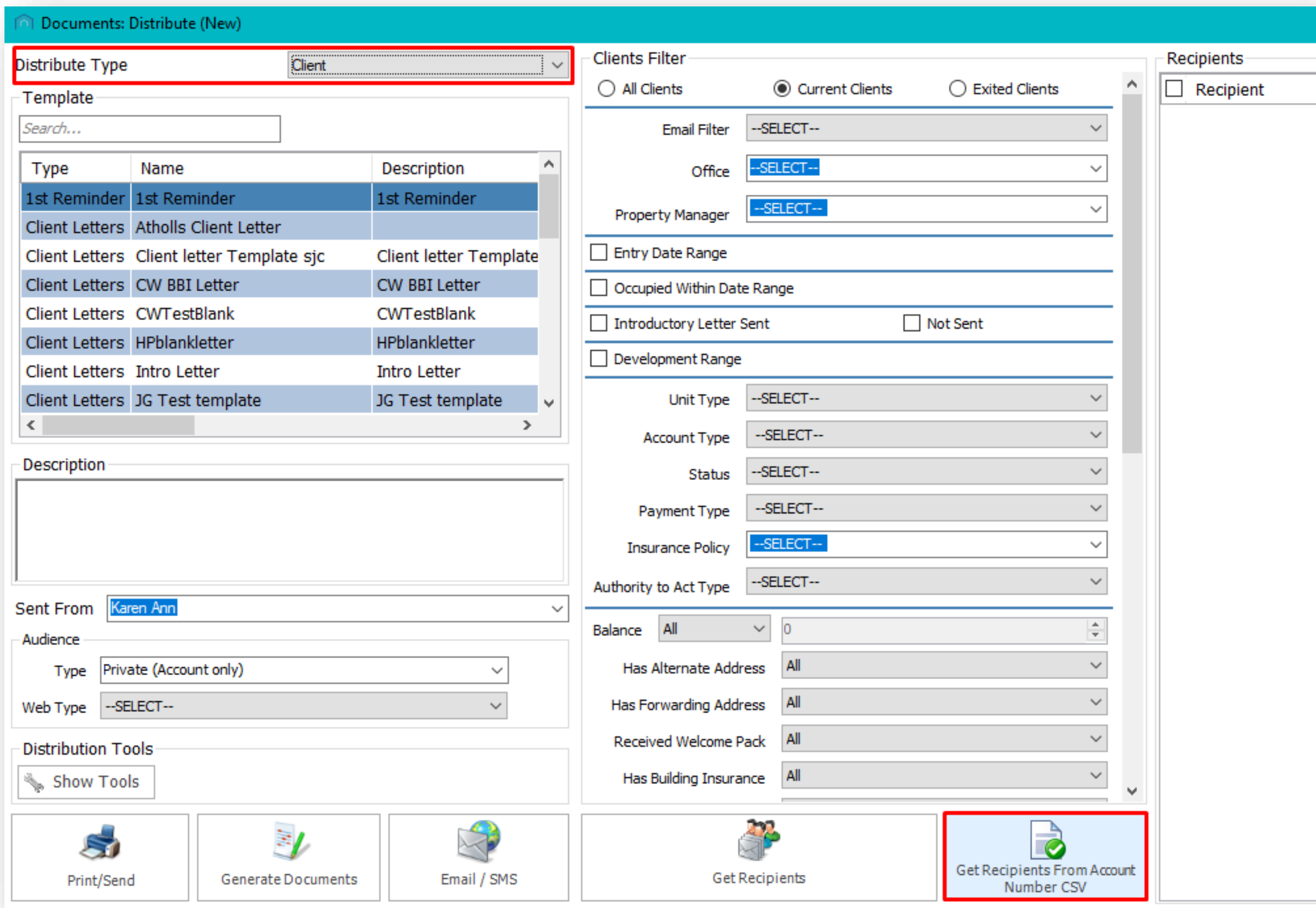
CPL SOFTWARE

CORE SYSTEM

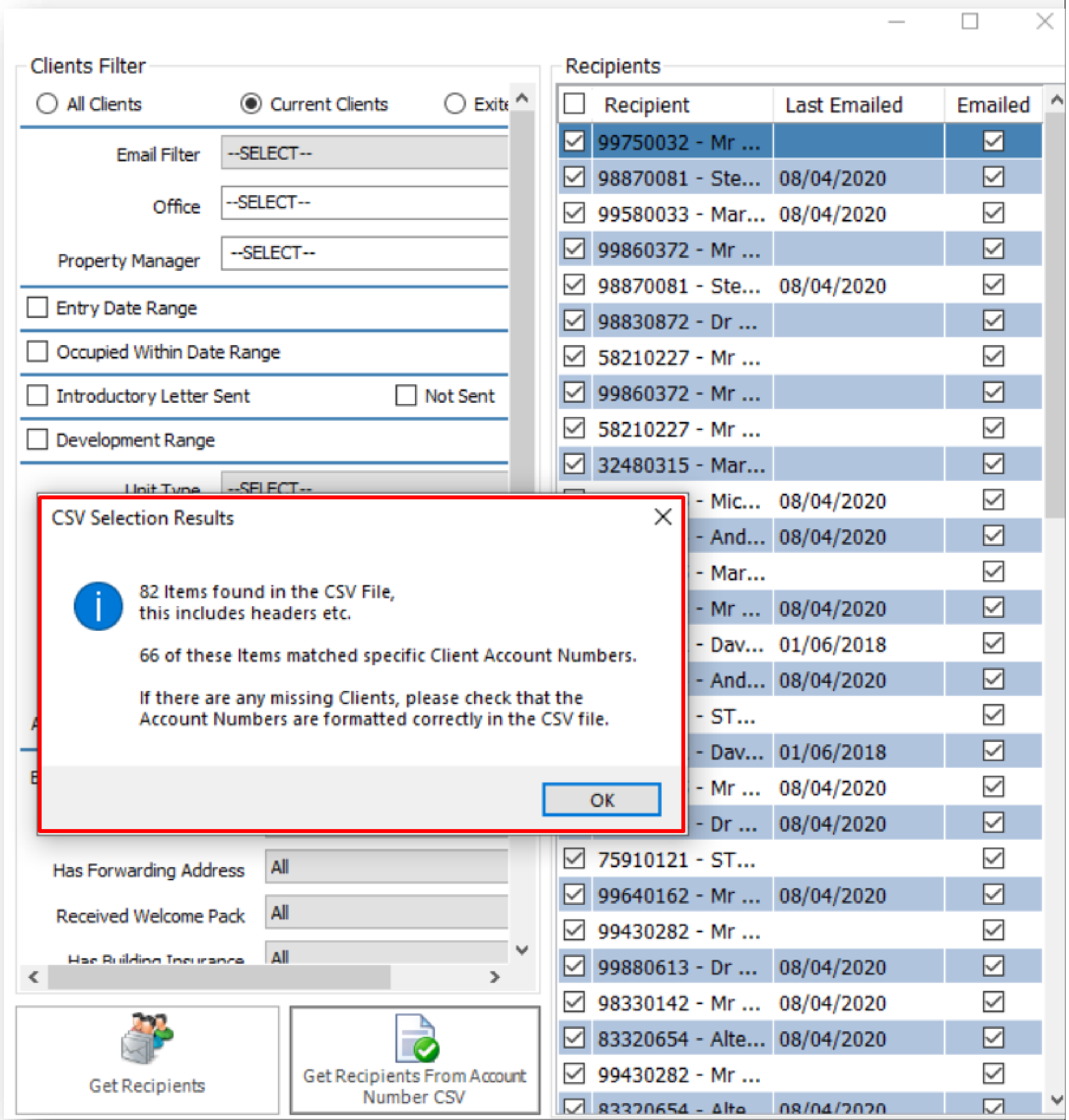
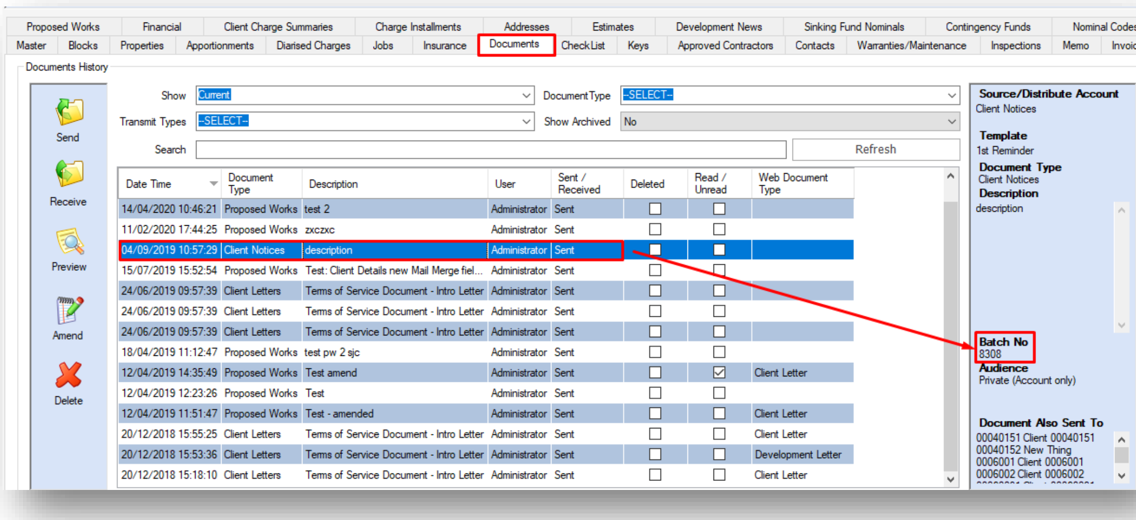
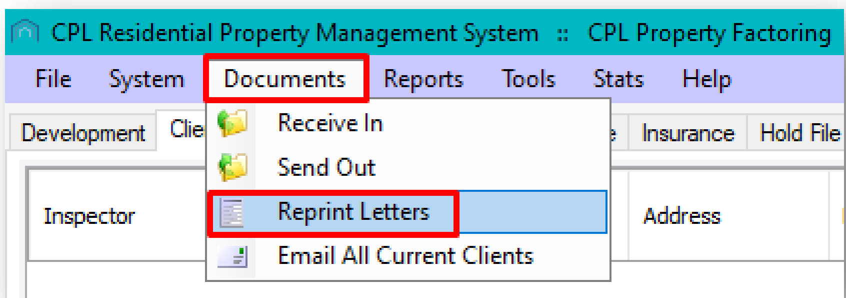
<table>
<tr><th>Number</th><th>Type</th><th>Title</th><th>Overview</th></tr>
<tr><td>10328</td><td>New Feature</td><td>Client Document Distribute Screen - new filter and .CSV client upload</td><td>
A new filter and a new feature have been added to the Document Distribution system within CPL.
The new 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.

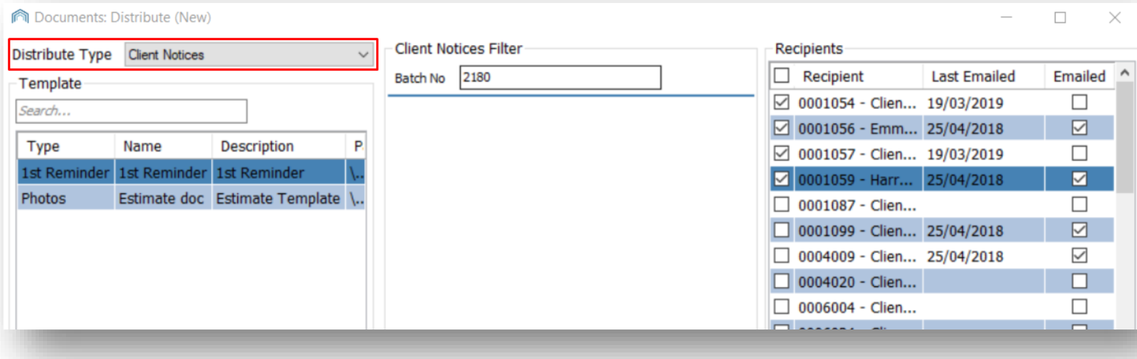
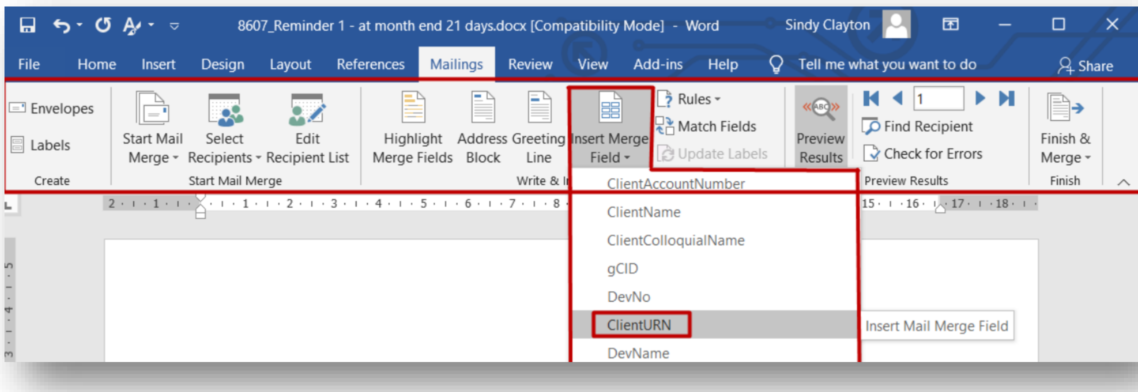
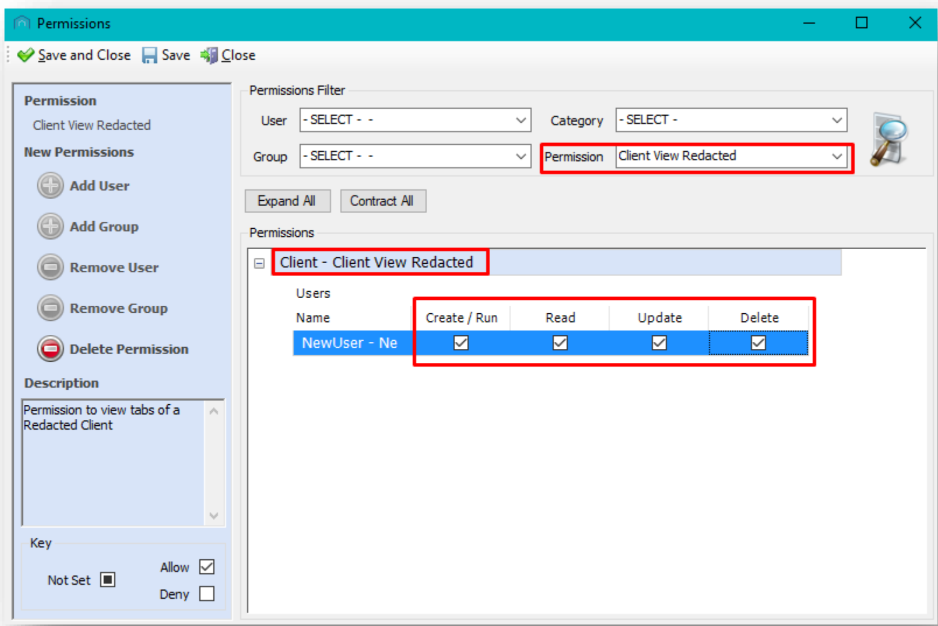
In order to use the new filter and upload feature, on the Documents: Distribute (New) screen, first set your Distribute Type filter to Client.


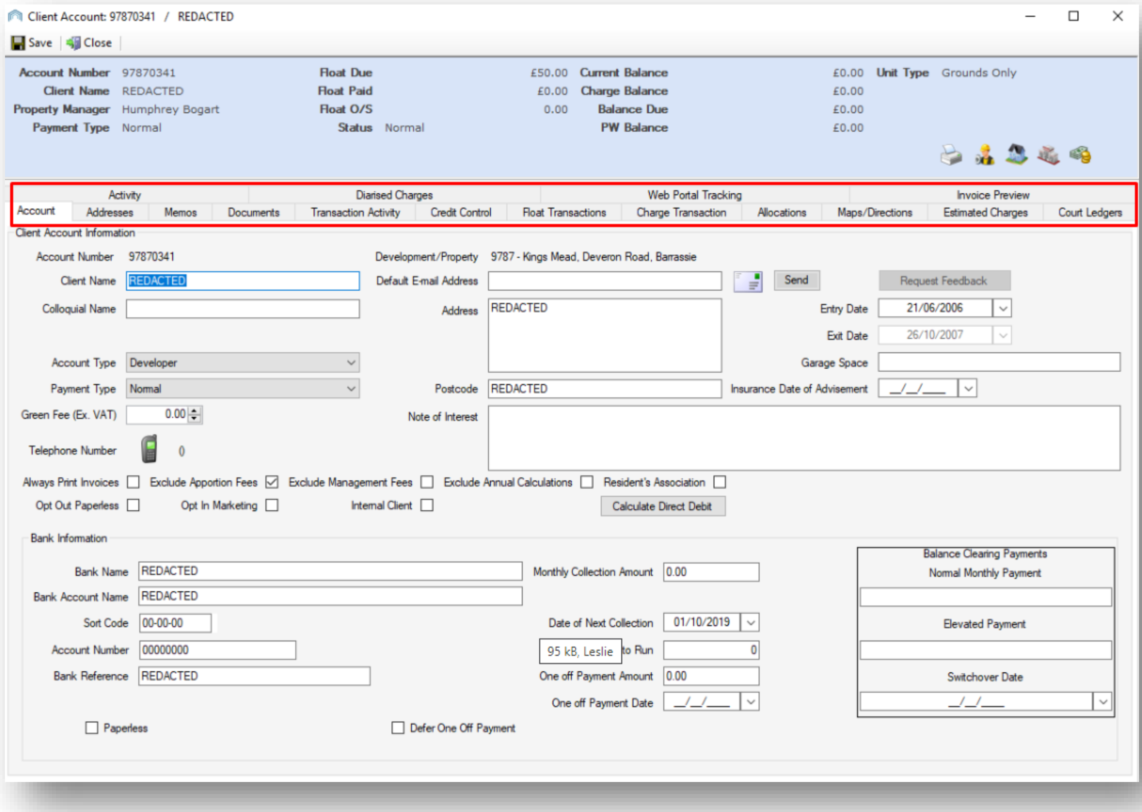
The new Office filter is available in the Clients Filter section in the middle of the screen.


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.


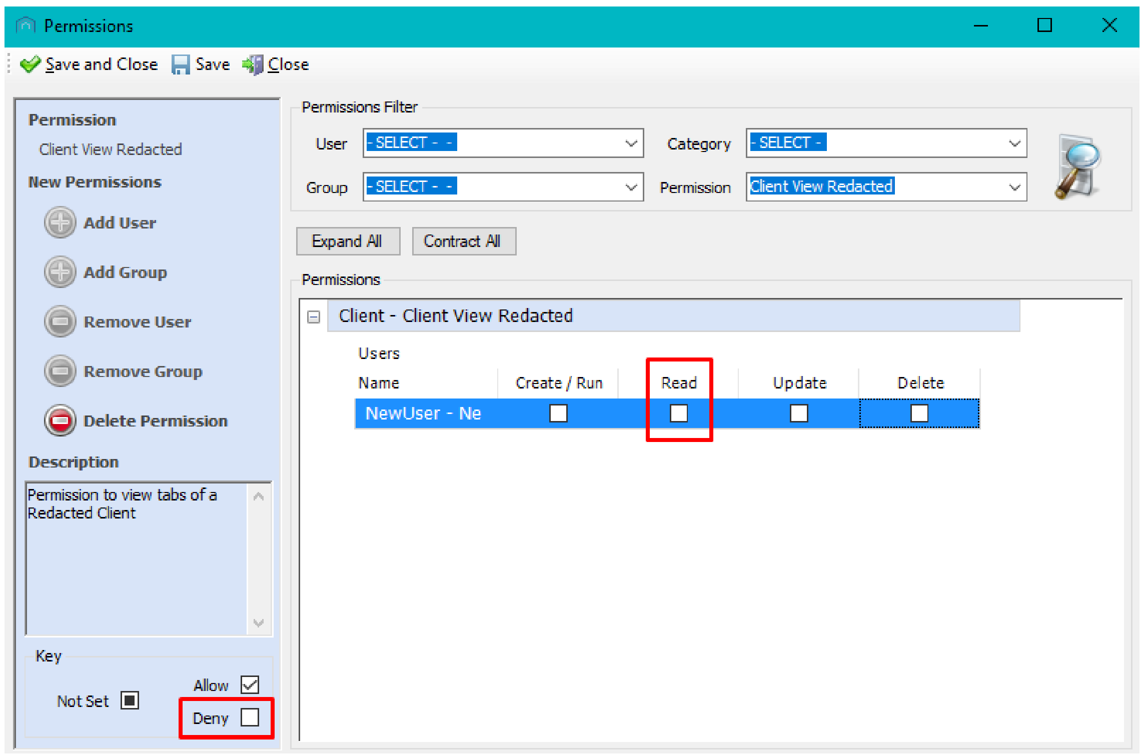
This will allow you to browse for and upload your .CSV of client account numbers and have these pulled into the recipients list for distribution.
</td></tr>
</table>

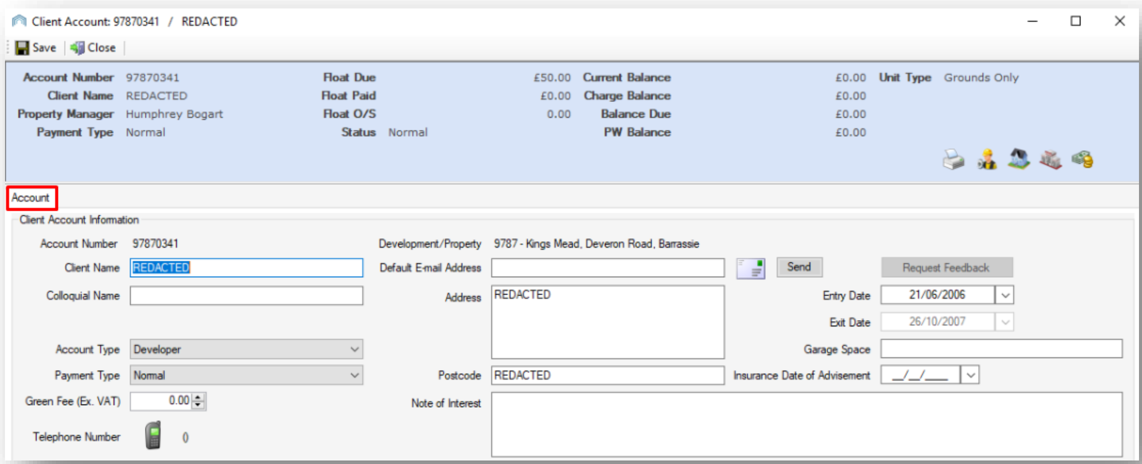
			
10301	New Feature	Batch Number added to Documents tab	An improvement has been made to the information available on the pin panel in the Documents tab by allowing a Batch Number to be displayed for your prints and emails. The Batch Number will display in the pin panel corresponding to whichever document 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. 

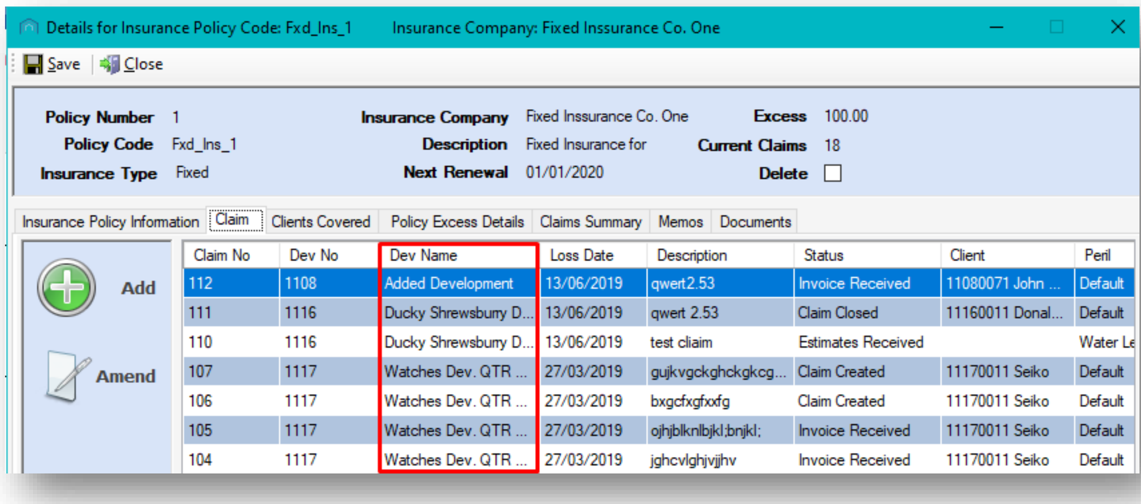
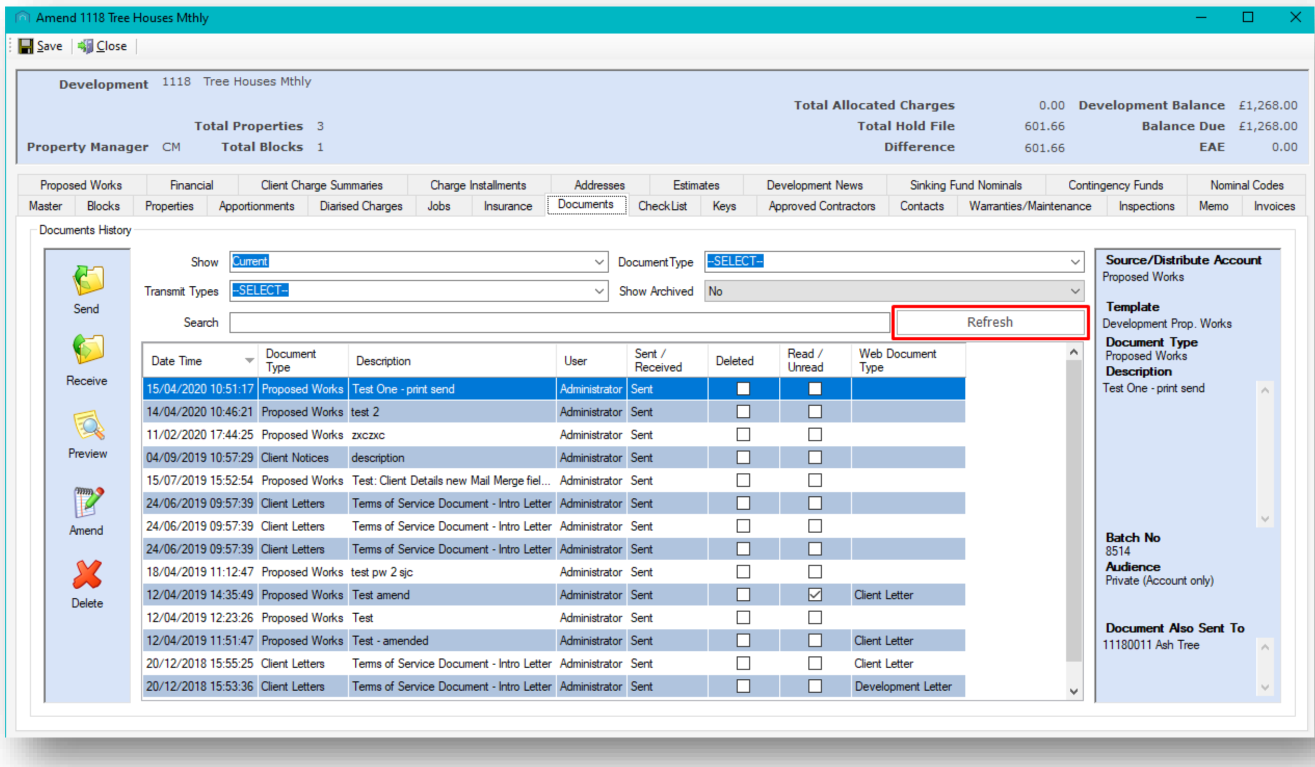
10340	New Feature	URN added to Client Notices Mail Merge Fields	The **Unique Reference Number** required for your clients to log into your Client Web Portal is now available as a Mail Merge field to be used in your documents when the Distribute Type is set to **Client Notices**. If this field is added 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. Make sure your **Distribute Type** field is set to **Client Notices**:  In the **Mailing** tab in your Word Document, select **Insert Merge Field** from the top menu:  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. 
10281	New Feature	Manage what can be seen for Redacted Clients	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**.  When this permission is granted to a user in CPL, they will be able to see all tabs for a redacted client.

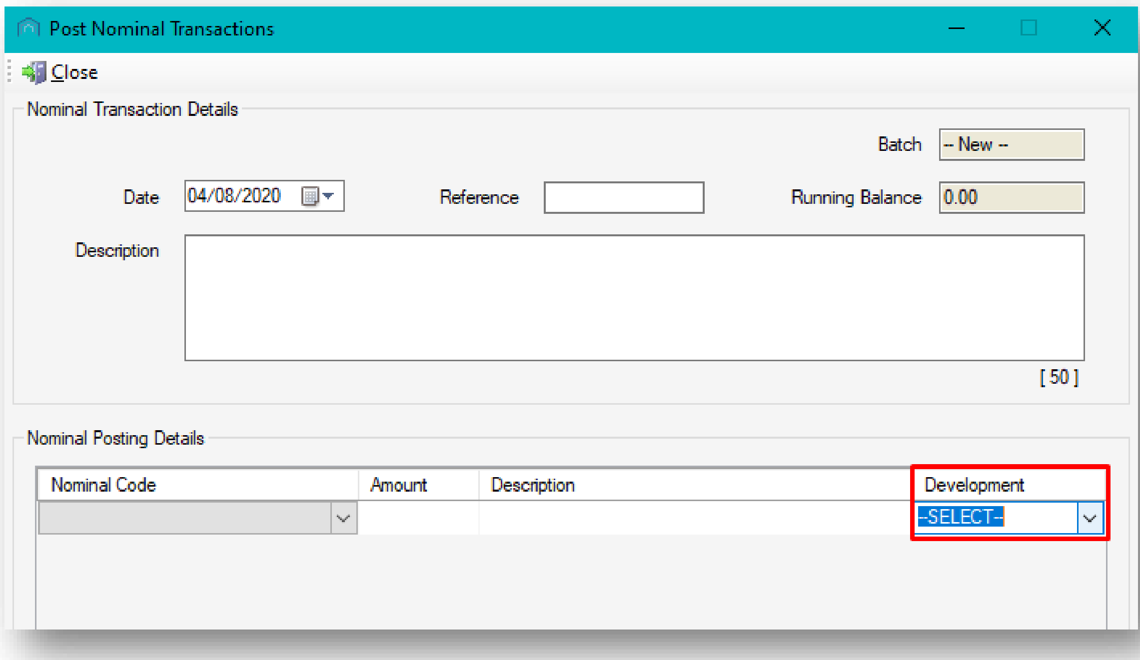
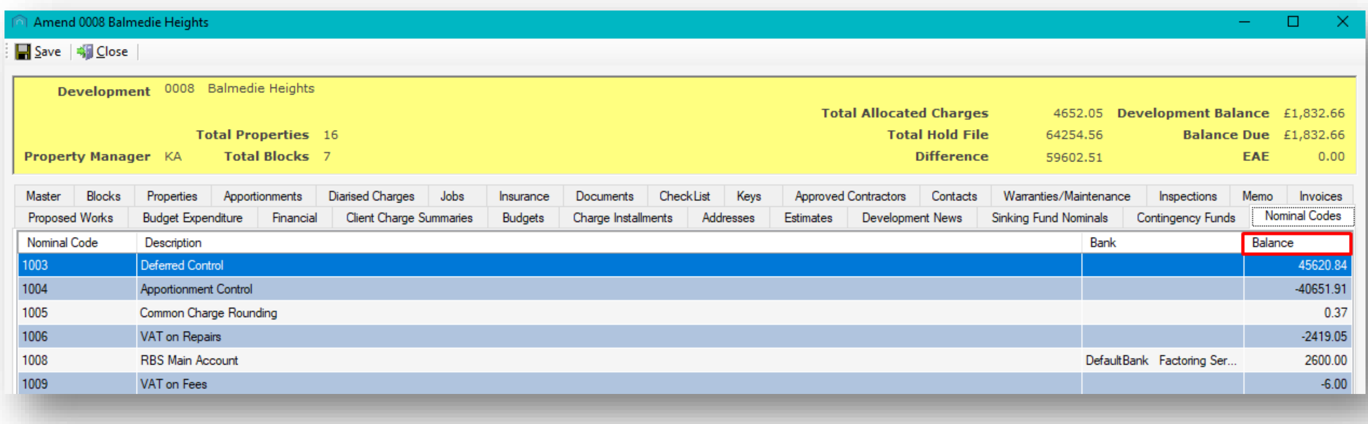


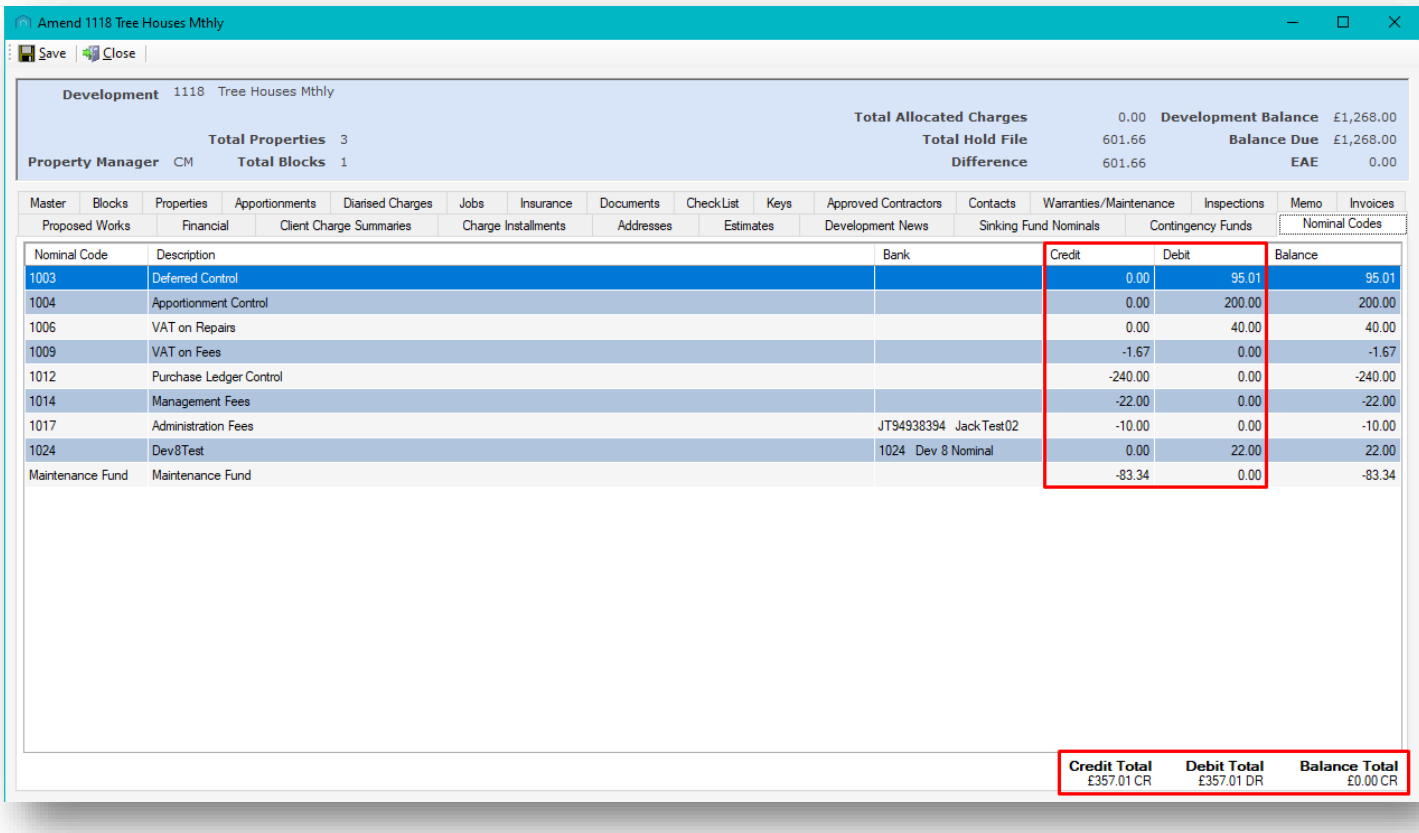
*If the User does not have the **Read** permission*, they will only be able to view the client's account details tab – with the data redacted.

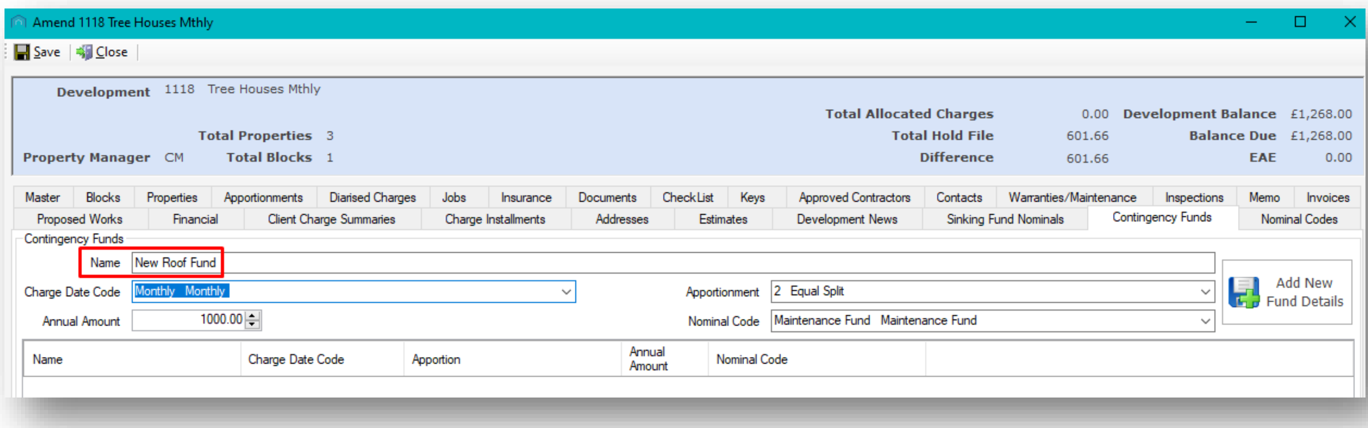


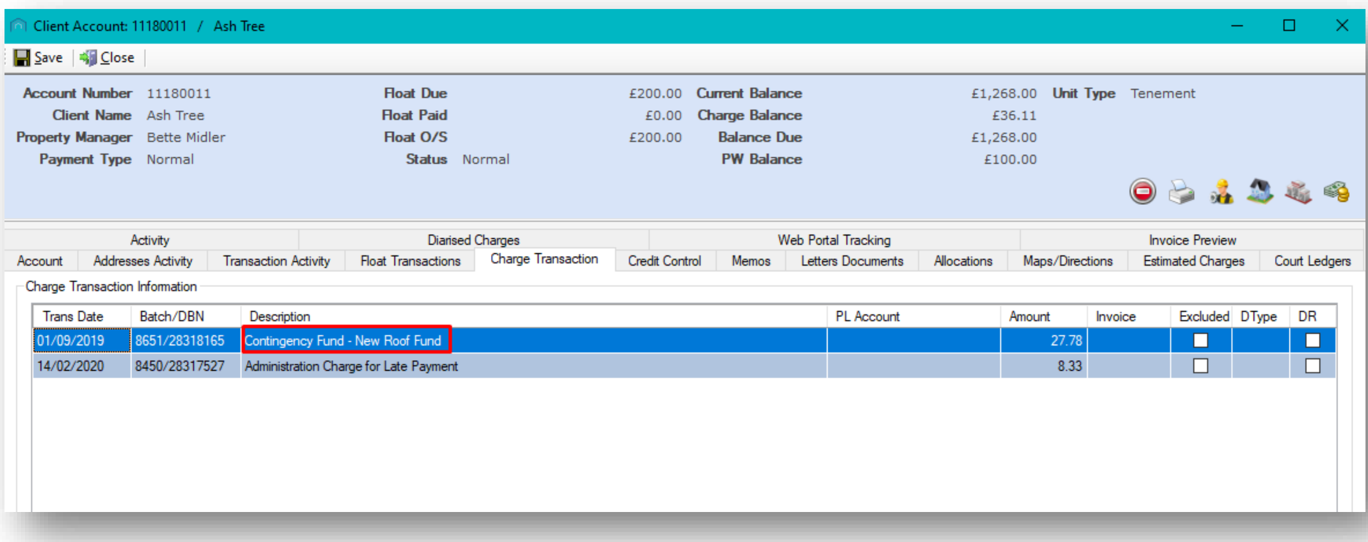


10284	New Feature	A Development Name column has been added to the Claim tab of Insurance Policy Details	In the Insurance module, the information available inside the Insurance Policy Details screens has been improved by adding a **Development Name** column to the grid on the **Claim** tab. This allows you a better overview of where claims are taking place. 
10396	Change	Drag and Drop functionality improved	A previous issue meant the drag and drop feature for adding emails to CPL from Outlook was causing an error message where there was a very long subject line for the email being imported. This issue has been resolved and drag and drop from Outlook has been tested and is now working correctly.
10400	Change	Refresh button on Documents tab	Previously the **Refresh** button on the documents tab in Development or Client was resetting the **Document Type** selection but not the remaining fields.  The **Refresh** button now refreshes for all fields.

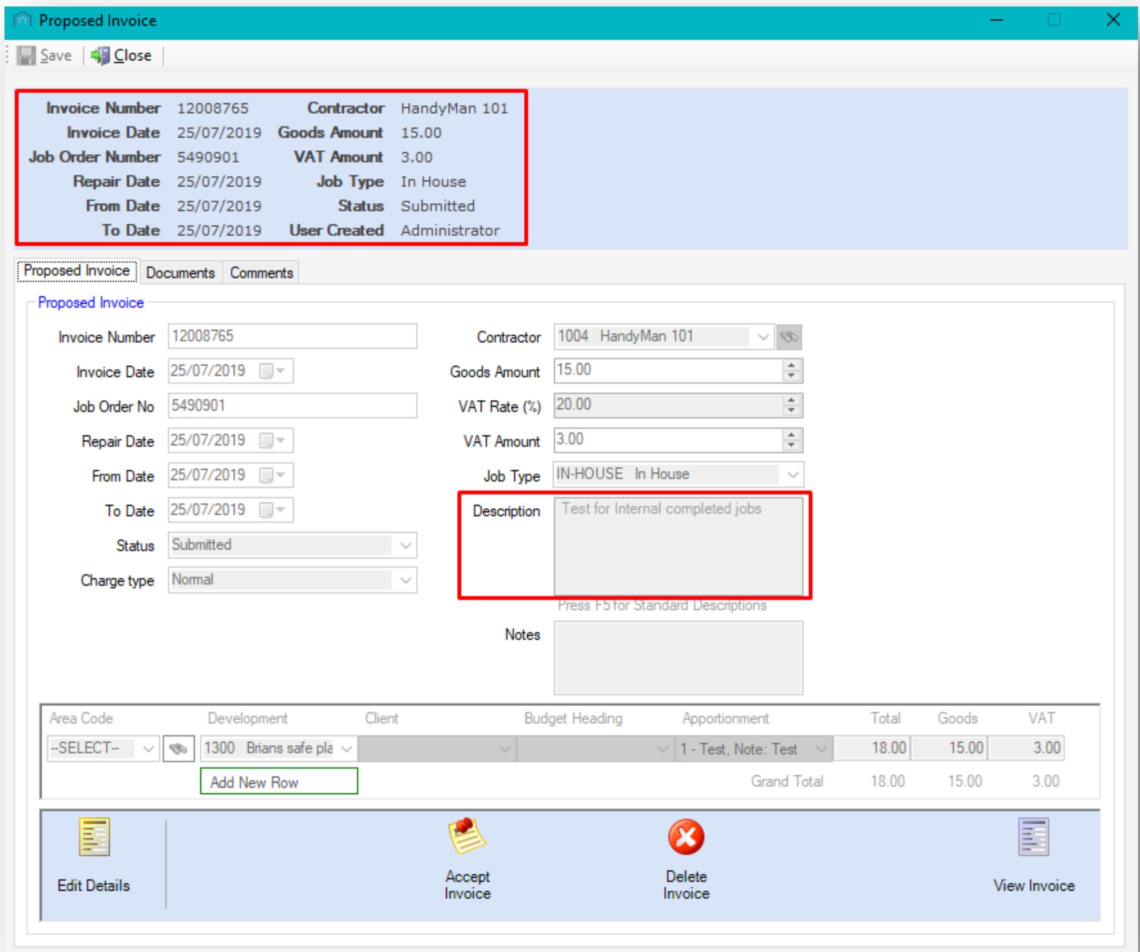
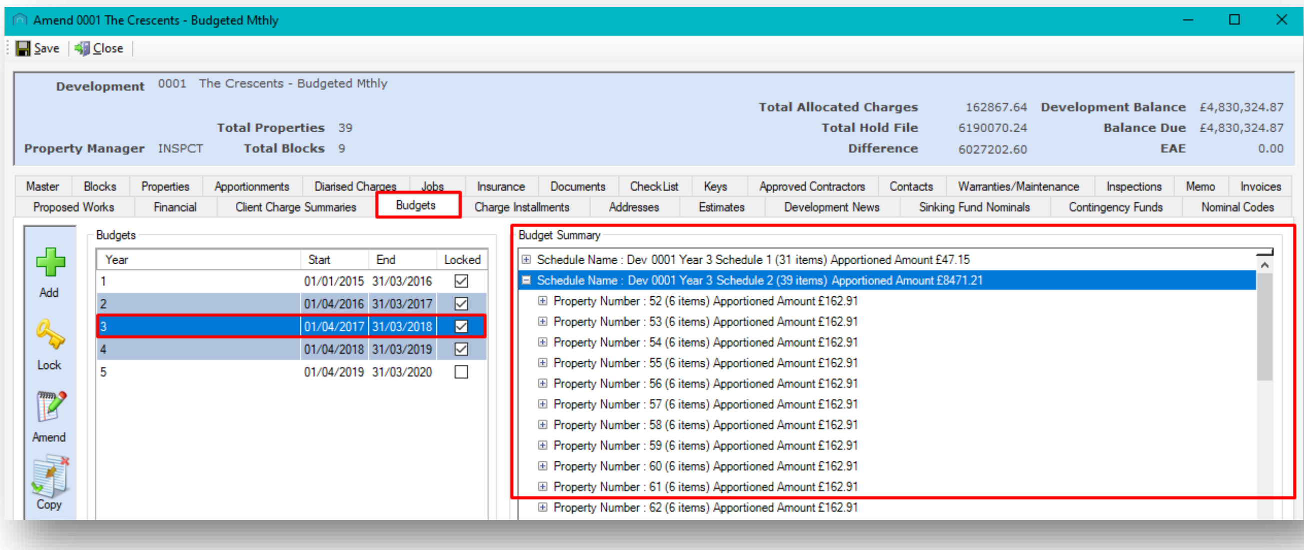
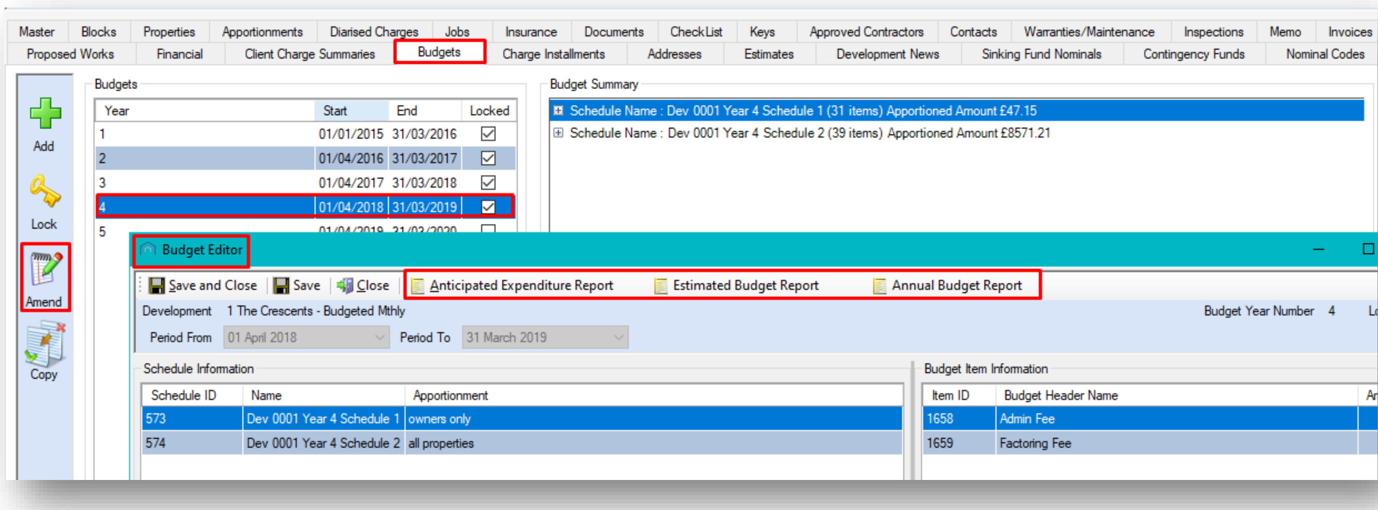
Number	Type	Title	Overview
10411	New Feature	New Auto-Suspend setting for Diarised Charges	The Diarised Charges system has been improved and now incorporates an **Auto Suspend** function. If this setting is activated it would mean that any Purchase Ledger invoice created by a diarised charge would be placed on suspend and would need to be authorised. *For more information on this setting and whether this would be useful for your company, please contact CPL Support and quote RPM-10411.*
10359	New Feature	Allow Nominal Posting to VAT Controls	A new System Setting has been added which would enable you to post directly to your VAT Control Nominals. 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. *For more information on this setting and whether this would be useful for your company, please contact CPL Support and quote RPM-10359.*
10381	New Feature	Nominal Posting: Require Development	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. 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.  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. *For more information on this setting and whether this would be useful for your company, please contact CPL Support and quote RPM-10381.*
10382	New Feature	Development Nominal Codes Tab Additions	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. Previously the grid in the Nominal Codes tab contained columns for: • Nominal Code • Description • Bank • Balance  Two new columns have now been added to the grid: • Credit (CR) • Debit (DR)

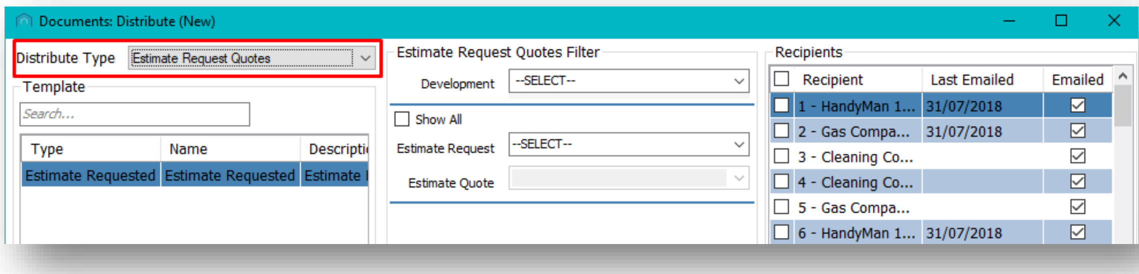
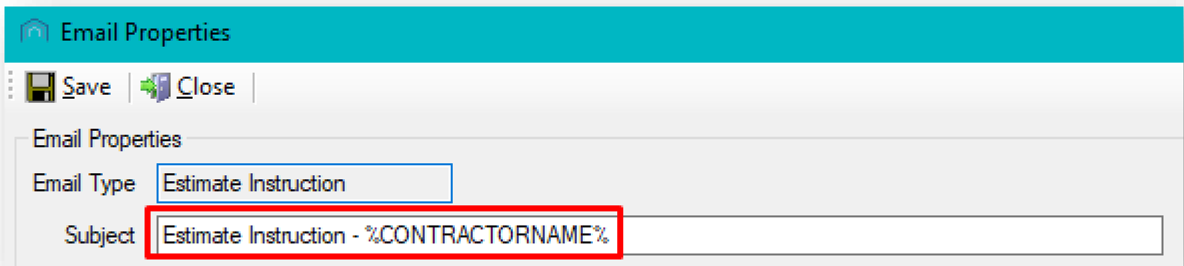
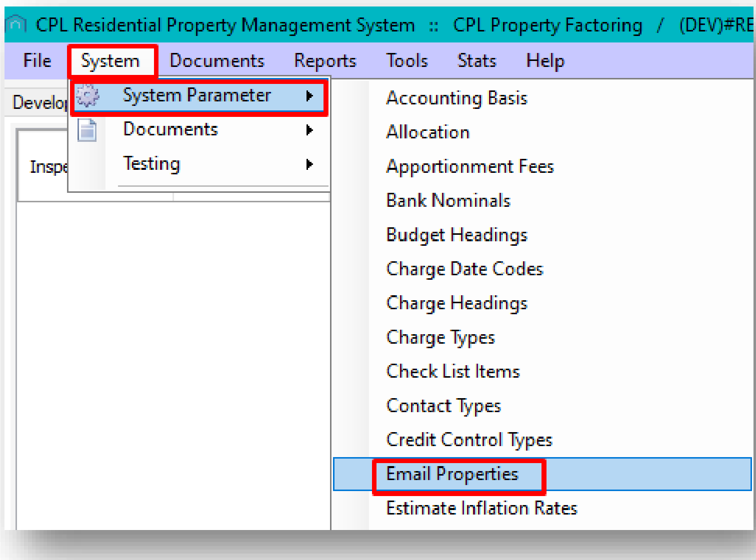
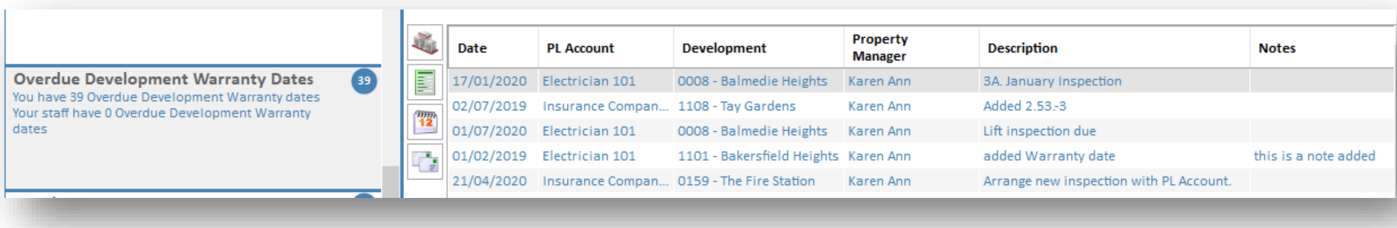
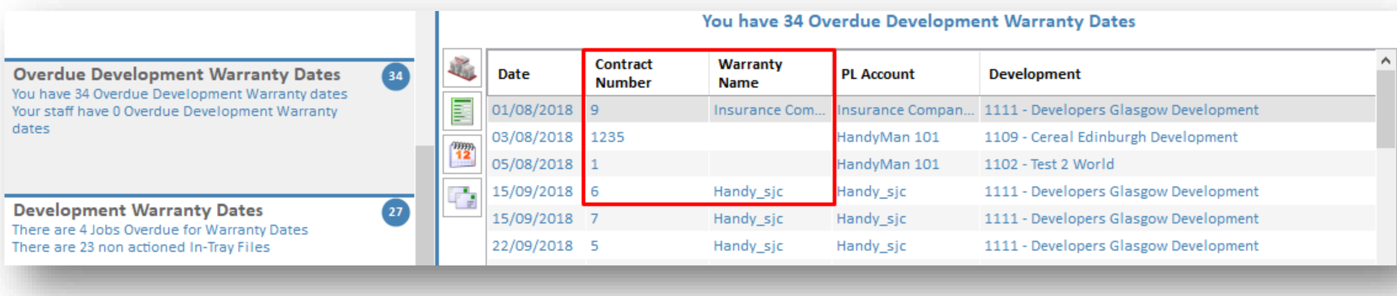
<table>
<tr><td></td><td></td><td></td><td>Totals are displayed at the bottom of the new Credit and Debit columns and also for the Balance column.

</td></tr>
<tr><td>10384</td><td>New Feature</td><td>The Contingency Funds description will be used as the Charge File description</td><td>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:


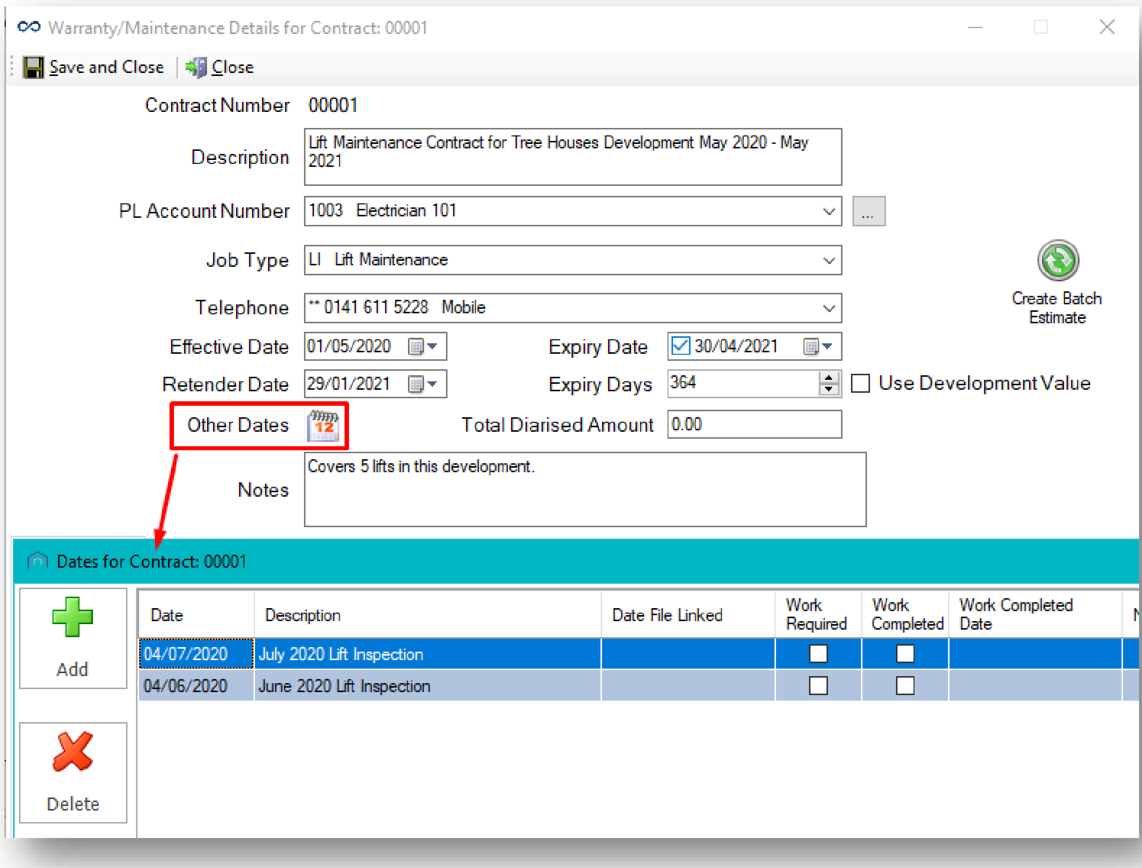
Once Process Contingenices has been run in Client Global you will see below that the resulting Charge Transaction Description is the same as the Contingency Fund Name.

</td></tr>
<tr><td>10233</td><td>Change</td><td>Budget dates and budget invoice dates anomaly</td><td>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.</td></tr>
</table>

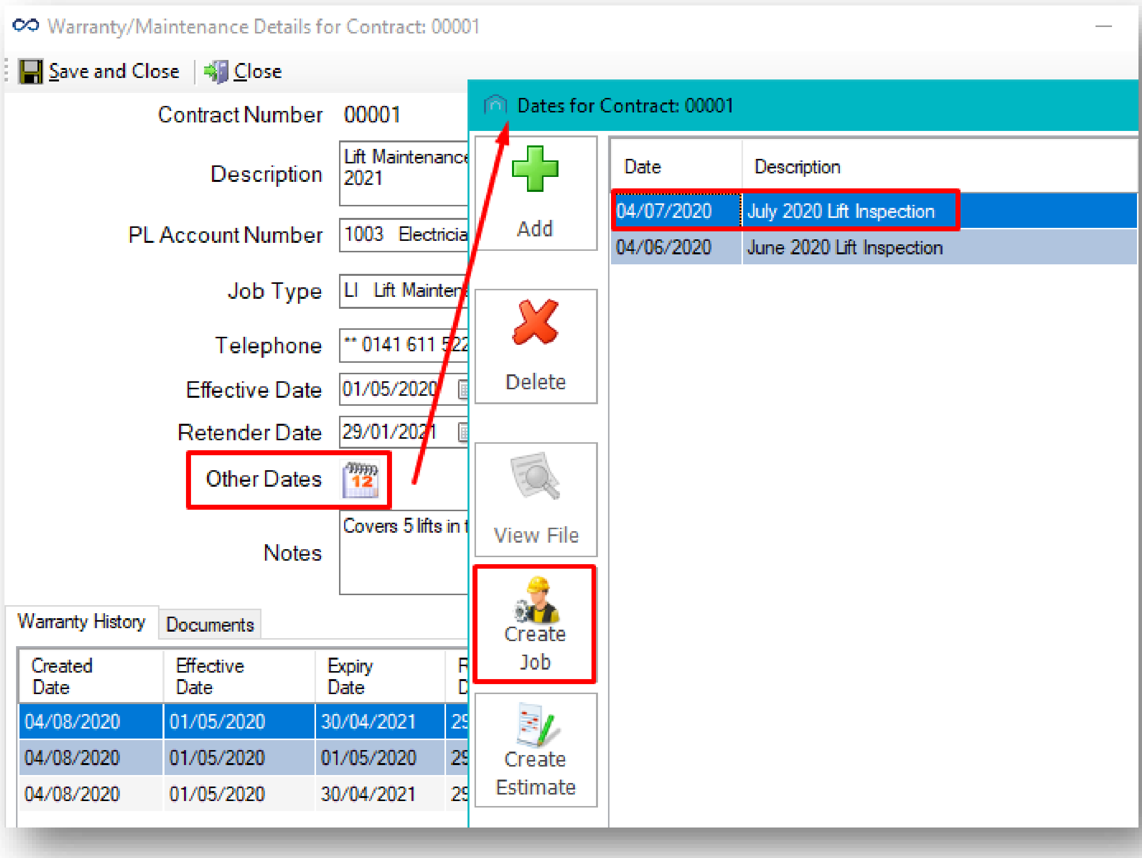
10380 and 10406	Change	Changes to Proposed Invoices screen	Previously, depending on screen resolution, some clients were experiencing difficulty viewing the icons at the foot of the Proposed Invoices screen. A scroll bar has been added to this screen to resolve this. There was also an issue reported 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. 
10450	Change	Budget Expenditure Tab Removed	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. 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.  If you open an individual **Budget Editor** screen from the main budgets screen, you can access all information for this budget and be able to run budget reports direct from this screen. 

Number	Type	Title	Overview
10258	Feature	New Document property for Estimate Quotes	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. The Document Distribute screen works as before, but with the new Distribution Type now available in the drop-down menu.  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.  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.  Select the template you wish to edit from the list which appears.
10147	New Feature	Dashboard - Overdue Development warranty Dates - additional columns	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.  The new updated card will also show warranty Contract Numbers and Warranty Names in new columns which have been added to the card. 

<table>
<tr>
<td>10369</td>
<td>New Feature</td>
<td>New System Setting for Warranty Dates screen</td>
<td>
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.

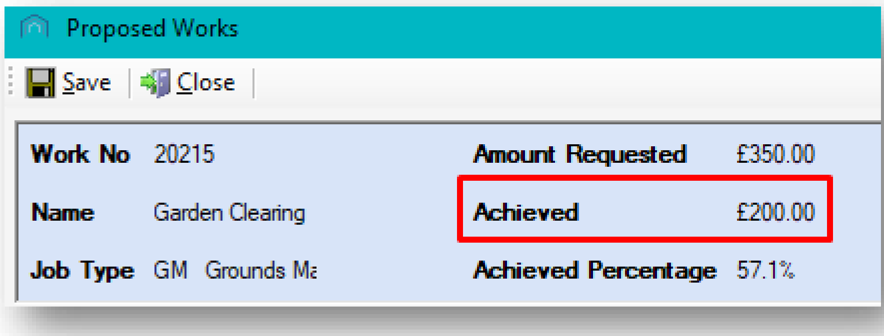
This setting has two statuses:

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.
</td>
</tr>
</table>

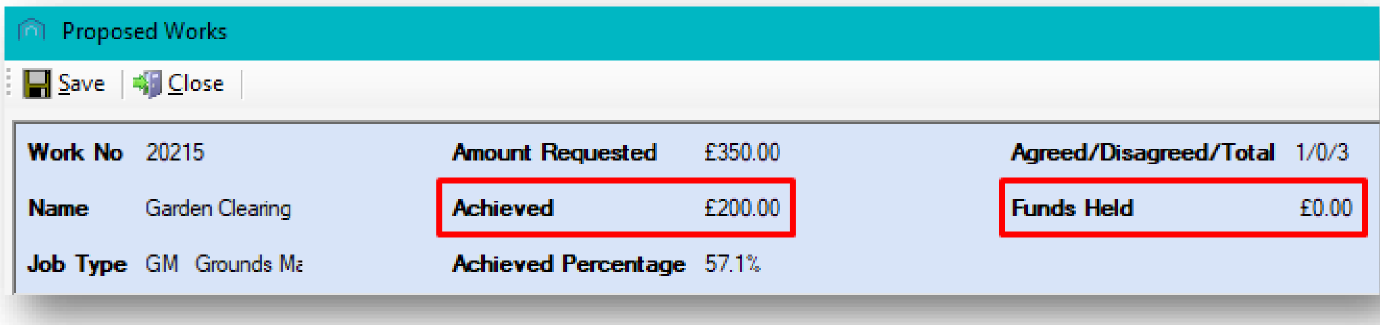
<table>
<tr>
<td>10278</td>
<td>New Feature</td>
<td>New Funds Held Total for Proposed Works</td>
<td>

Previously the only total available in the pin panel for a proposed work was for funds achieved, whether any had been released or not.



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.

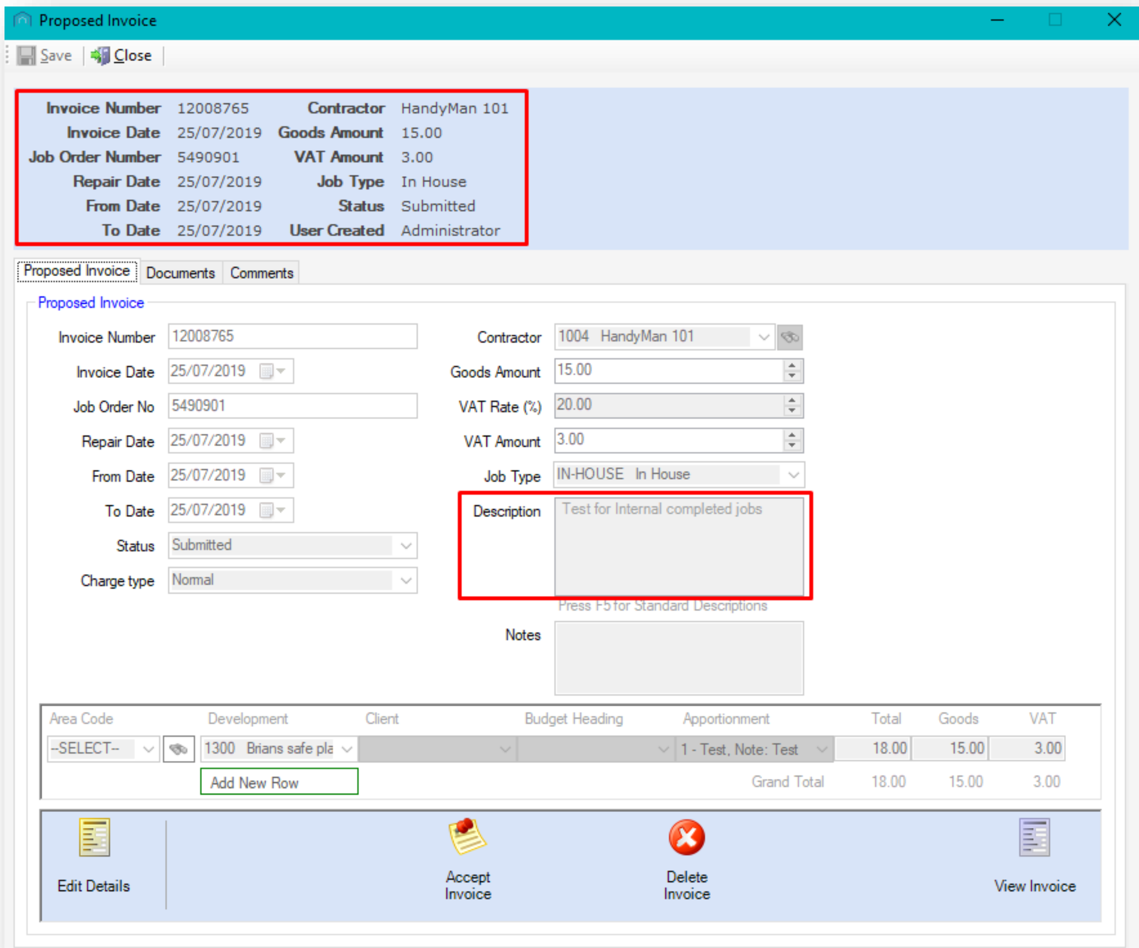
In the example below you will note that although £200.00 has been paid towards the proposed work, the **Funds Held** total is £0.00 because this collected amount has been released.



</td>
</tr>
<tr>
<td>10380 and 10406</td>
<td>Change</td>
<td>Changes to Proposed Invoices screen</td>
<td>

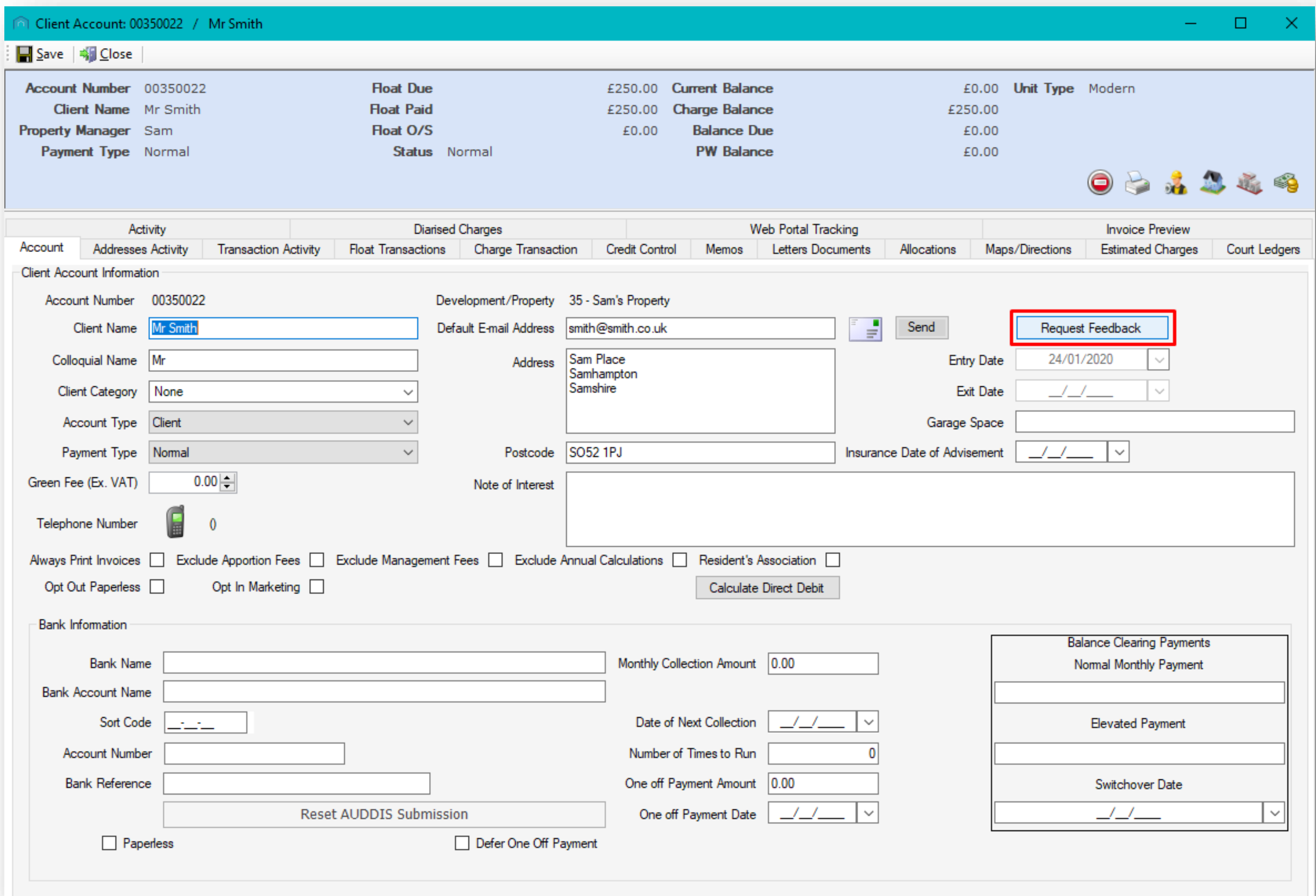
Previously, depending on screen resolution, some clients were experiencing difficulty viewing the icons at the foot of the Proposed Invoices screen. A scroll bar has been added to this screen to resolve this.

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.



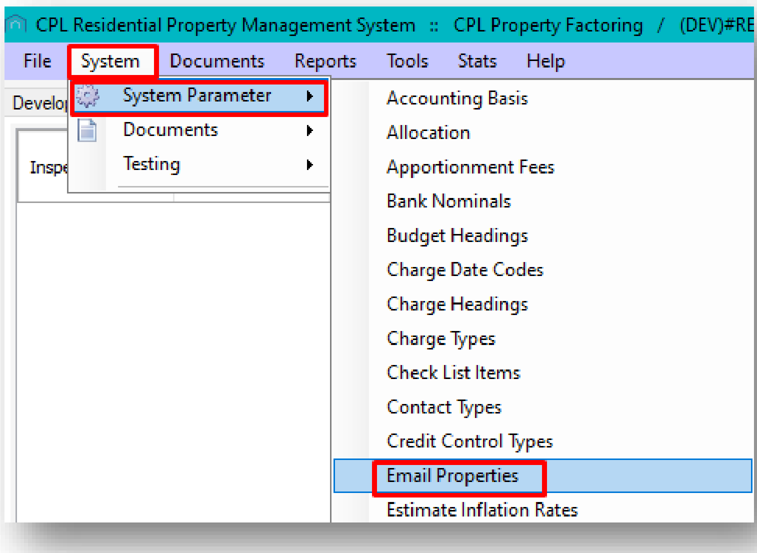
</td>
</tr>
</table>

Number	Type	Title	Overview
10277	New Feature	Request Feedback button on Client Screen	A new **Request Feedback** feature has been added a to the Client master screen.

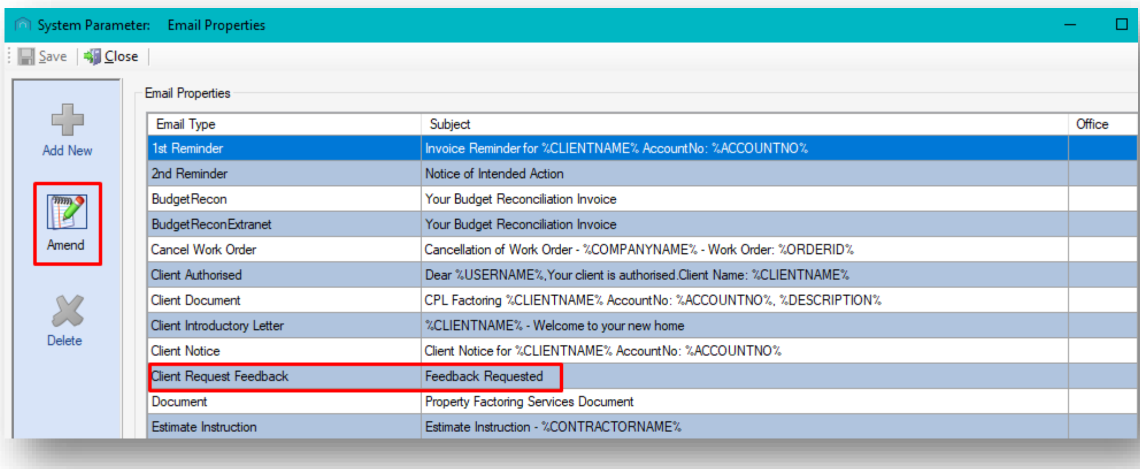


Clicking this button will send an email to your client, using their default email address and a new email template which is available. If they don't have an email address listed then the **Request Feedback** button will be greyed out.

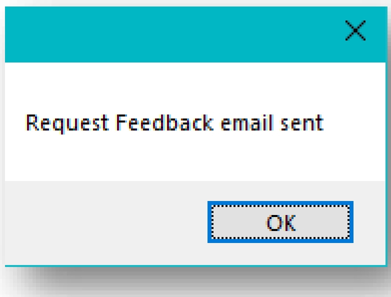
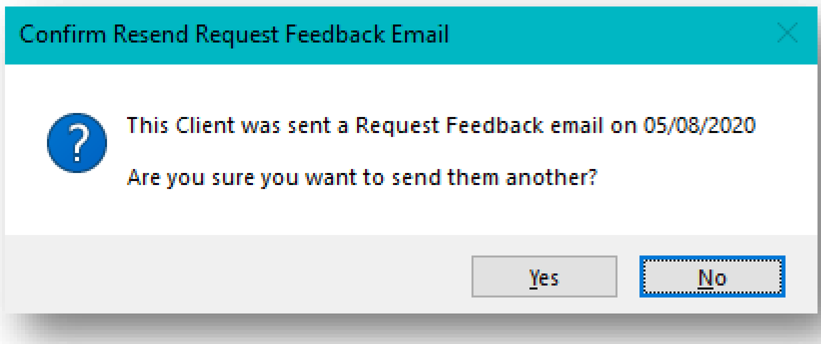
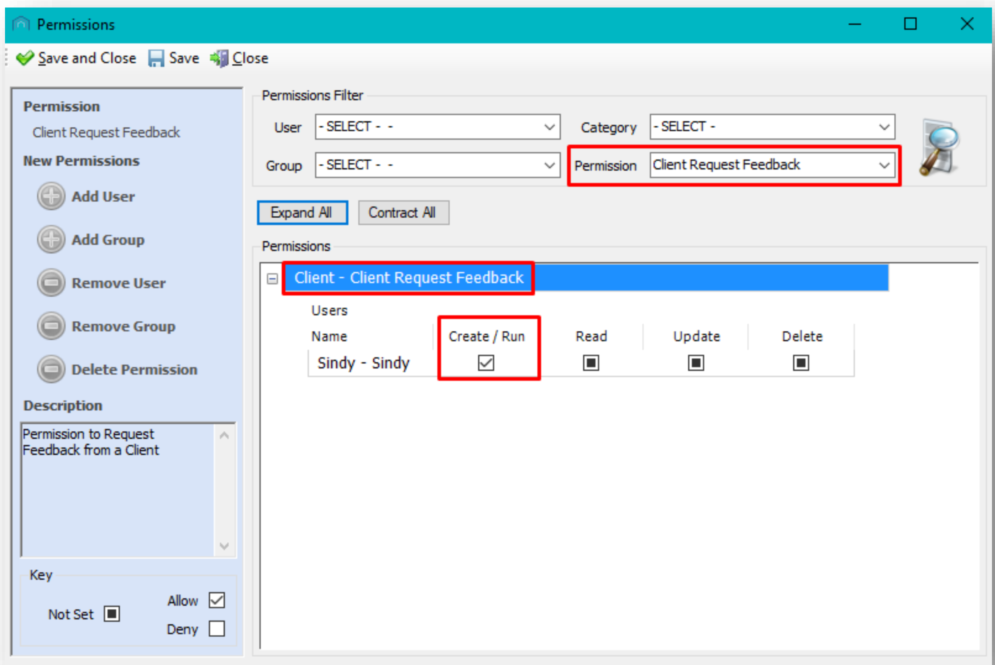
A new email template has been added to CPL called **Feedback Request**. You can edit the subject and content of this template by clicking on **System**, and selecting **System Parameter** and then selecting **Email Properties** from the resulting drop-down menu.

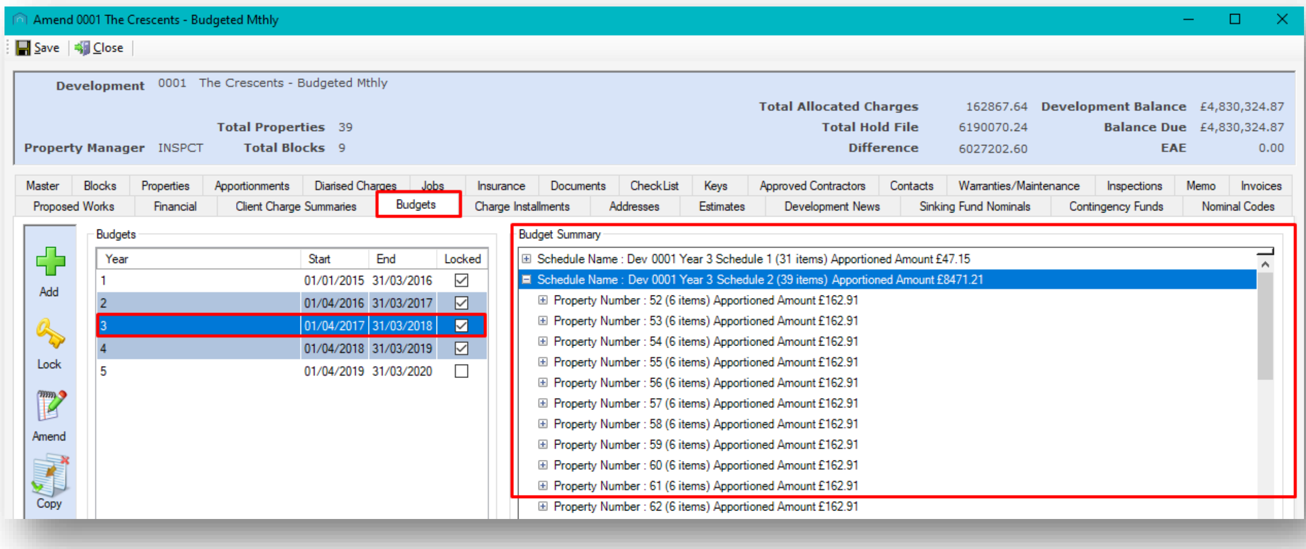


This will open the list of Email Properties templates and you can select the **Client Request Feedback** template and amend its content to suit your purposes.

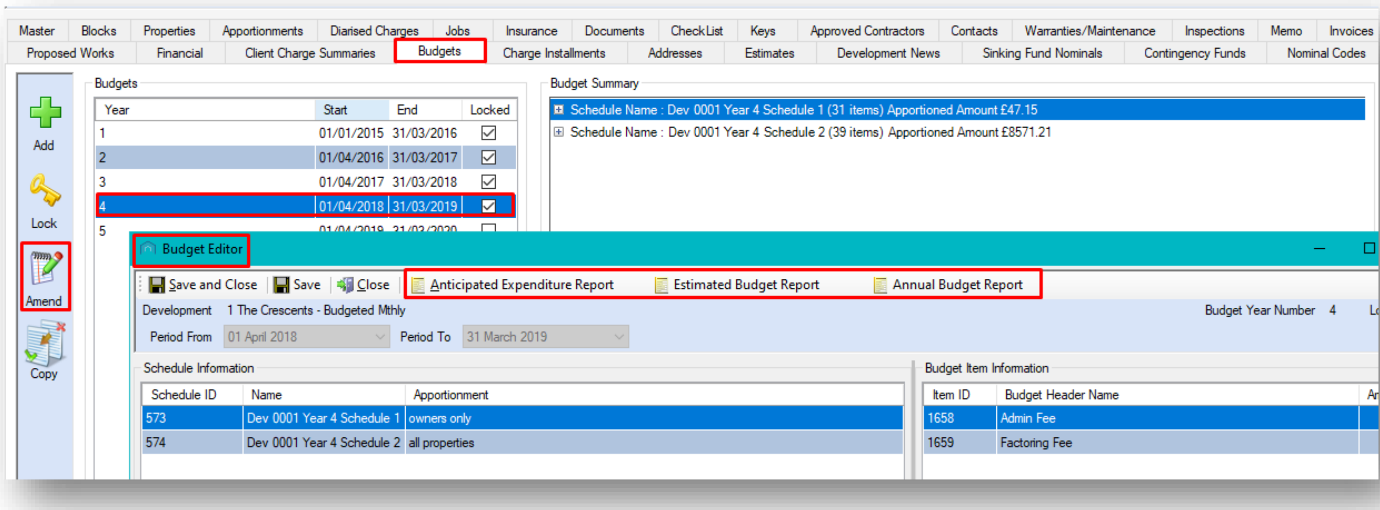


The first time feedback is requested from an individual client, no confirmation is required and you will receive a confirmation pop-up message informing you that a feedback request has been sent.

			 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.  Clicking **No** will cancel the operation, clicking **Yes** will send another feedback request email to the client. 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. 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**.  If a user does not have permission then the **Request Feedback** button will be greyed out. 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 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.
10375	New Feature	New System Setting for Green Fees	The Green Fees system inside CPL has been updated by adding a new System Setting called **Green Fee Run For New Owners.** This new setting will allow you to choose between the following two options: • 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. *For more information on this setting and whether this would be useful for your company, please contact CPL Support and quote RPM-10375.*
10450	Change	Budget Expenditure Tab Removed	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. 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.



If you open an individual **Budget Editor** screen from the main budgets screen, you can access all information for this budget and be able to run budget reports direct from this screen.



Please note, these release notes and the information contained within is subject to change until client-wide roll out in late August 2020.