



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

CPL RELEASE NOTES V2.55

NOV 2019



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INTRODUCTION

Welcome to the new layout for our Release Notes.

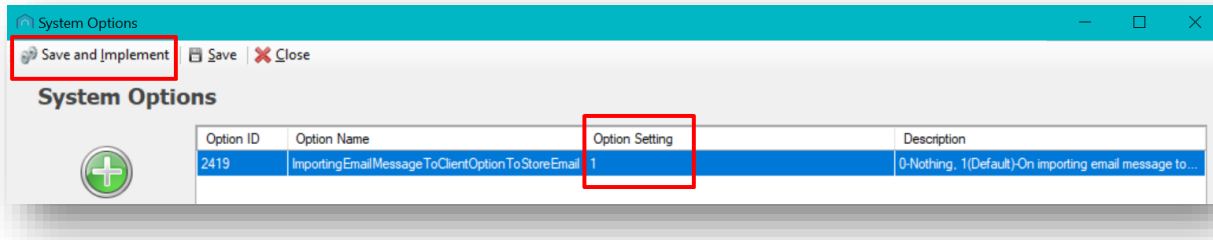
After some feedback we have implemented a new format for these notes.



Changes and new features have been classified under Core System, Financial and Jobs. Going forward there will be a section for Property Management but there were no changes or new features coming under the PM section in this release.

Please do let us know what you think of the new layout and if it works for you.

This document contains a list of new features and changes implemented in Release 2.55.

CORE SYSTEM

Number	Type	Title	Overview
10084	Change	Pin Panel and Payment Posting windows did not scale correctly when zoomed +125%	Previously there was an issue with the scaling of CPL's payment posting and the Pin Panel at the top of the Client account window. We have resolved this issue and these will now display correctly.
9849	Change	Minimum screen size - accessibility	After requests from multiple users, we have revised the layouts of multiple screens to allow for up to 150% increase in size when using the Windows accessibility features. The following rules apply: <ul style="list-style-type: none"> 1920 x 1080 or larger is required to guarantee that 150% scaling works 1600 x 900 or larger is required to guarantee that 125% scaling works 1280 x 720 or larger is required to guarantee that 100% scaling works
9743	Change	In-Tray Record Type Population Very Slowly	We have revised the In-Tray module to improve the speed with which the display grids populate. These will now load more quickly.
10011	Change	Drag and Drop from Outlook into Documents has been Changed	Due to a Microsoft .NET update, drag and drop for Outlook into documents had ceased to function. We have now revised our code to allow for the .Net update and drag and drop functions will now work as before
9306	New Feature	Drag and Drop emails into CPL - Read and store email address if not already present.	<p>Once you have activated the System Setting ImportingEmailMessageToClientOptionToStoreEmail, CPL now has the ability to store email addresses in the Letters Documents tab on a client's account from emails dragged and dropped into the system from Outlook.</p>  <p>After filling out the information on the Documents: Receive screen and clicking on Save, CPL will prompt you with the option to store the email address on the client's account through a pop-up box and then confirm with you once you choose Yes.</p>

			<div data-bbox="1137 225 1751 616"> <p>Add New Email Address?</p> <p> The email message Photos of Water Damage.msg has the email address:</p> <p>Karen-Ann.McSwiggan@cplsoftware.com</p> <p>This email address is not registered to this Client.</p> <p>Would you like to add it?</p> <p><input type="button" value="Yes"/> <input type="button" value="No"/></p> </div> <div data-bbox="1046 722 1848 1018"> <p>New Email Address Added</p> <p> The email address Karen-Ann.McSwiggan@cplsoftware.com has been added to this Client's Account Emails.</p> <p><input type="button" value="OK"/></p> </div> <p>Once you select OK the File Uploaded Successfully message will appear.</p> <p>You can also use this feature when adding an email to the In-Tray. Select a Client from the left of the screen and select an email that's been dragged and dropped from the file tray on the right. When you use the Link or Link & Follow Up buttons you will see the same pop-up messages as above, after you have saved from the Documents: Receive screen.</p> <p>With either method, once you have asked the system to store the email address you will see this new address listed under Client Email.</p>
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Client Email

Save & Close Close

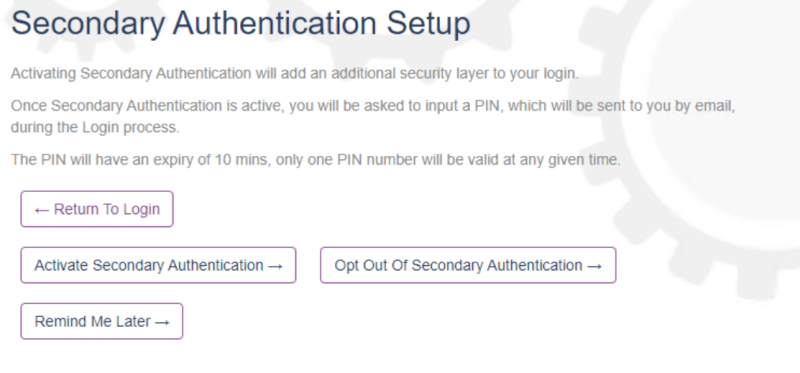
Client Email Details

Email	Description	Default	For Documents	For Invoice	Delete
Karen-Ann.McSw...	Auto added on im...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
test@test.com	test	Auto added on importing email to Client.			<input checked="" type="checkbox"/> Delete

For more details on how to use this feature, please contact CPL support quoting YT-9306.

10044	Change	Web Portal - PL invoices too large to download	We have redesigned the document handling system on the Portal. This has resulted in the ability to download extra-large files. The speed at which these download, however, will be affected by the size of the document and the bandwidth available for it to utilise when downloading.
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9952	New Feature	2FA for Web Portal and App	<p>We have implemented Two Factor Authentication for the Portal and Web apps available via CPL. This comes in the form of a token and an email password. For more details on how to use the authentication, please contact CPL support quoting YT-9952.</p> 
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9973

New
FeatureNew **Document Distribute** filter
- 'Has Web User Account'

We have added a mail merge filter called **Has Web User Account** to the Document Distribute screen which has three statuses to choose from:

- **Select** - will select all users
- **Yes** - only users with web accounts
- **No** - only users without web accounts

This feature can be found on the **Document Distribute (New)** screen, in the Clients Filter Pane.

The screenshot shows the 'Documents: Distribute (New)' window. The 'Distribute Type' dropdown is set to 'Client'. The 'Clients Filter' pane on the right contains several filters, including 'Has Web User Account' which is set to 'All'. The 'Recipients' table is empty.

Type	Name	De:
1st Reminder	1st Reminder	1st
Client Letters	Atholls Client Letter	
Client Letters	Client letter Template sjc	Clie
Client Letters	CW BBI Letter	CW
Client Letters	CWTestBlank	CW
Client Letters	HPblankletter	HPb
Client Letters	Intro Letter	Intr

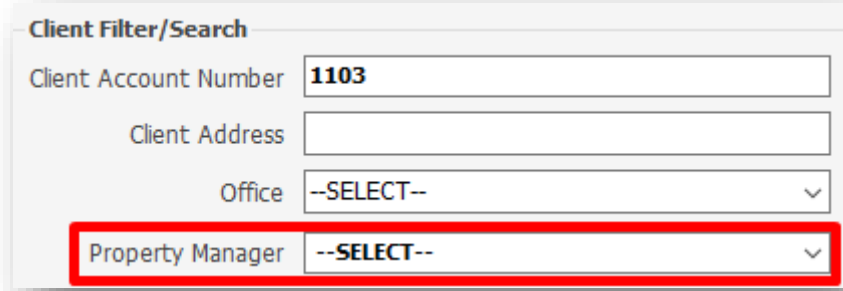
Account Type	Status	Payment Type	Insurance Policy	Authority to Act Type
--SELECT--	--SELECT--	--SELECT--	--SELECT--	--SELECT--

Balance	Has Alternate Address	Has Forwarding Address	Received Welcome Pack	Has Building Insurance	Opted Out Paperless	Residents Association	Internal Clients	Opted In To Marketing
All	All	All	All	All	All	All	All	All

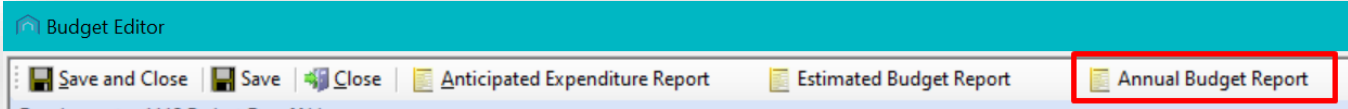
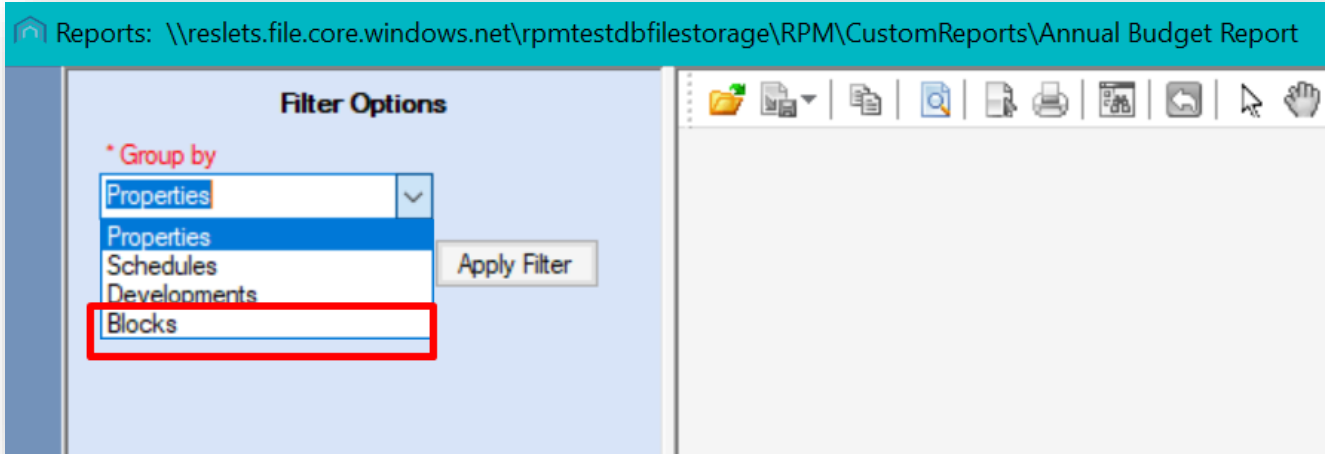
Has Web User Account
All
Yes
No

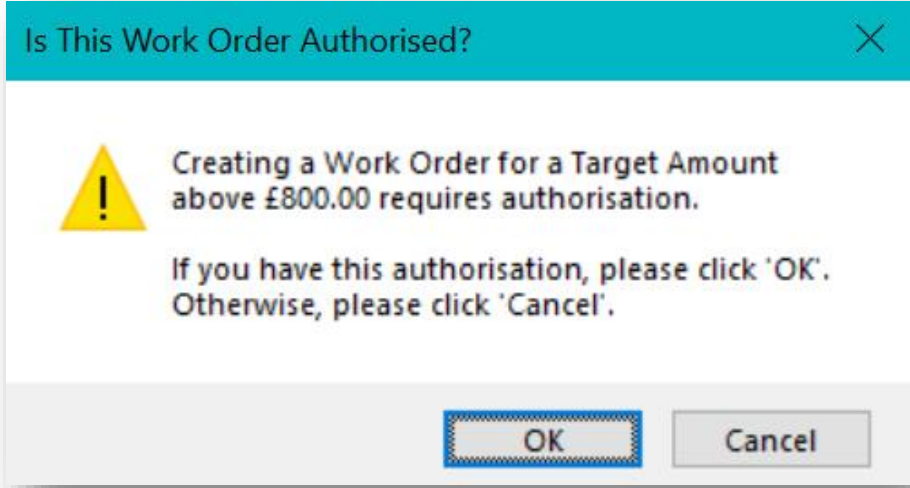
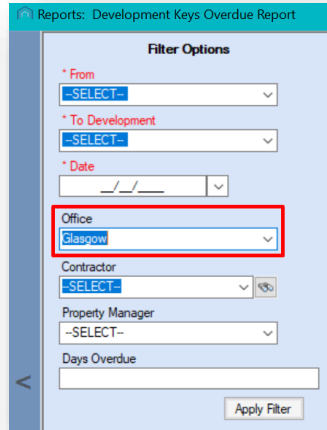
Recipient	Last Emailed	Emailed
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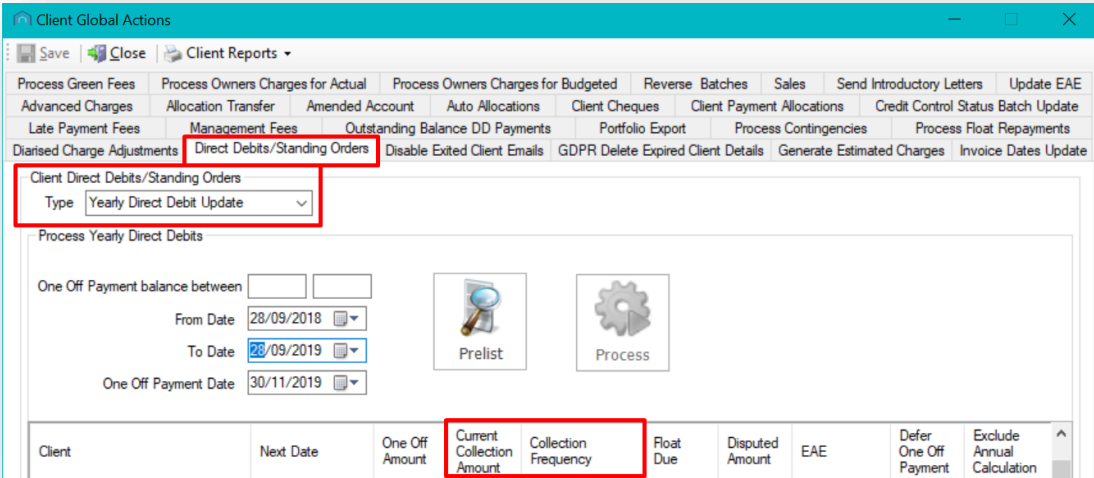


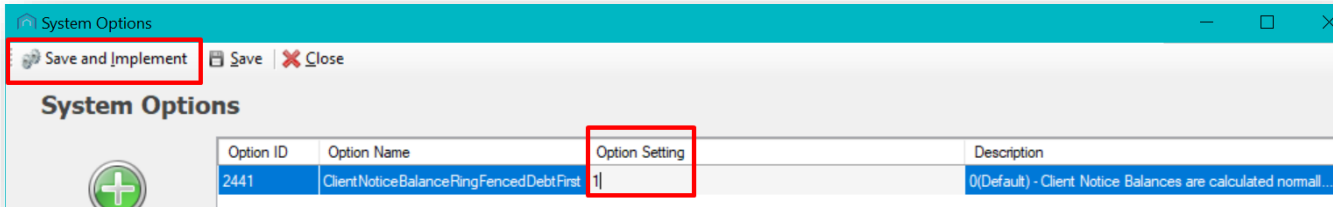
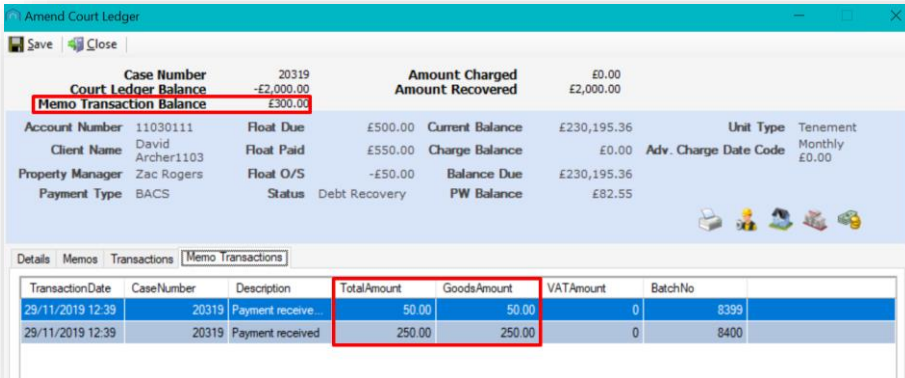
9909	New Feature	Client Master Search - New Filters	<p>We have added a new filter to the Client tab's Filter/ Search field. This 'Property Manager' filter will filter clients by the development's Property Manager and Credit Control Manager. This will bring the Client tab more in line with the search options available in the Development Tab.</p> 
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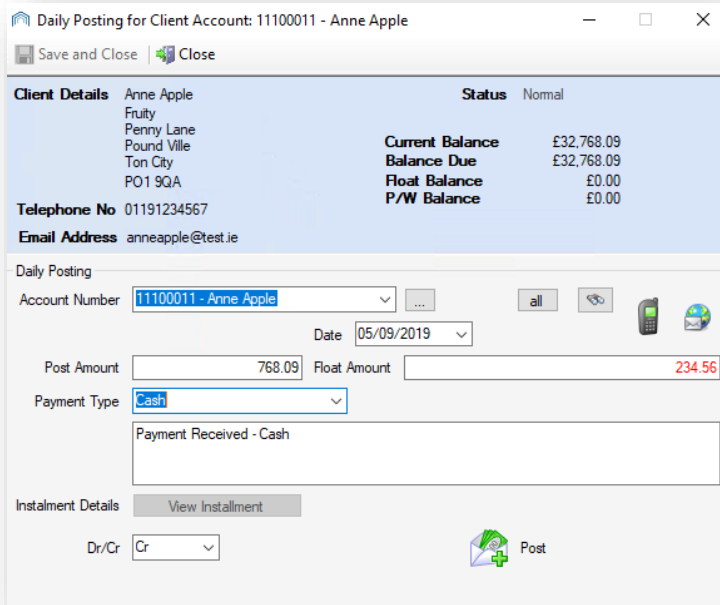
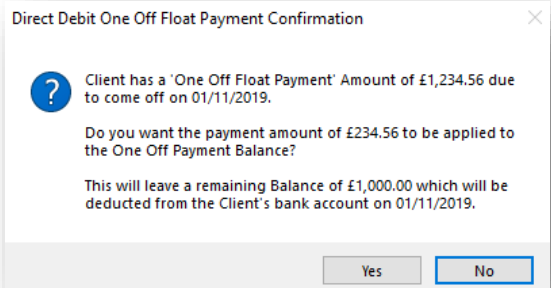
FINANCIAL

Number	Type	Title	Overview
10092	Change	Updated Annual Budget Report to have the option to group by Blocks	<p>Under the previous Budgets system, the Annual Budget Report had the option to sort by Blocks. After a previous revision of the Budget system, the report only had the option to sort by Properties, Schedules and Developments. This was a deliberate change, however after requests from users we have reinstated the Blocks option on reports.</p>  
10085	Change	Apportioned Hold File posts to deleted clients.	We have resolved an intermittent issue where deleted clients were receiving charges when an apportioned PL transaction was posted to the Hold File and subsequently released/ processed to the Charge File.
9930	New Feature	Job warning - show warning when the job is over a certain amount.	We have added a new System Setting called JobWarningLimit . This setting will allow you to set a value in £. When a job is being raised which is equal to or greater than this set value the user will see a pop-up warning as they save stage 2 of the job process. They will get the option to acknowledge that they have gone over the amount or cancel saving the job. The default value for this setting will be 0 (no limit). It is hoped this will reduce the frequency with which jobs are raised in error.

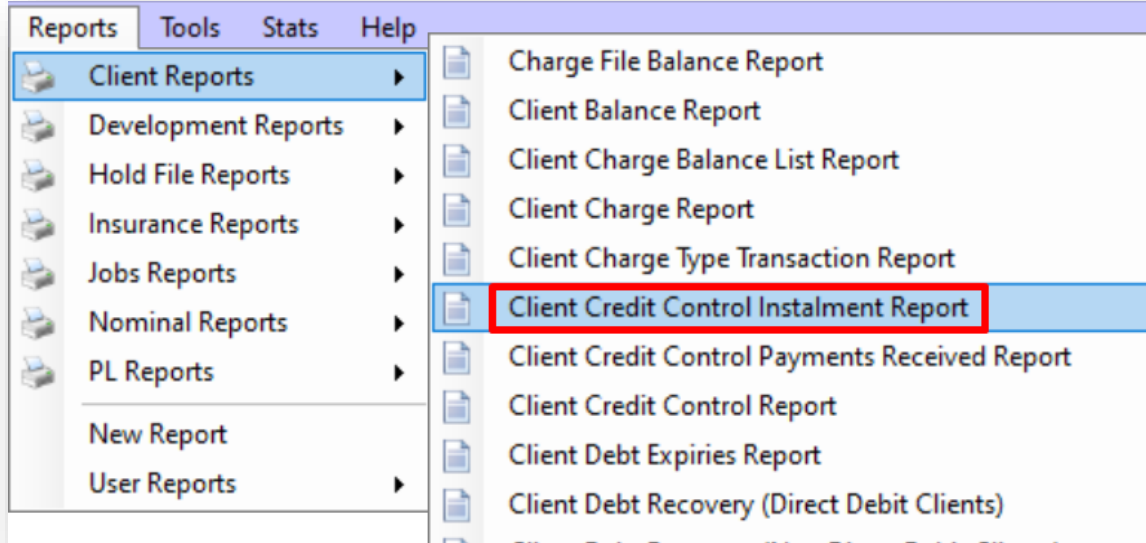
			 <p>A dialog box titled "Is This Work Order Authorised?" with a yellow warning icon. The text inside reads: "Creating a Work Order for a Target Amount above £800.00 requires authorisation. If you have this authorisation, please click 'OK'. Otherwise, please click 'Cancel'." There are "OK" and "Cancel" buttons at the bottom.</p>
10019	New Feature	Development Keys Overdue Report	<p>We have added the option to sort the Overdue Keys Report by Office. You will find this as an optional filter in the left-hand panel of the Development Keys Overdue Report.</p>  <p>A screenshot of the "Reports: Development Keys Overdue Report" window. The "Filter Options" panel on the left includes fields for "From", "To Development", "Date", "Office" (highlighted with a red box and containing "Glasgow"), "Contractor", "Property Manager", and "Days Overdue". An "Apply Filter" button is at the bottom right.</p>

9993	Change	Client DD Calculation - not checking entry date	We have revised the Direct Debit Calculator to include the move-in date when calculating missed payments. This will also affect clients setting up a Direct Debit using the Web Portal.
10080	New Feature	Client Global - Annual DD update - add new pre-list columns	<p>We have added two new columns to the Annual DD Update Pre-List for additional information. These are:</p> <ul style="list-style-type: none"> Current Collection Amount - how much this client is paying in their DD Collection Frequency - how often this payment is collected from the client 

9986	New Feature	Clients at court changes	<p>We have added a new way of calculating debt that means amounts ringfenced for debt will be separated from the clients' overall balance. This New Feature allows you to ringfence debt that you have already taken court action for. The debt amount to be ringfenced is entered as a court ledger record for the client. This will exclude the amount already taken to court and only chase for monies owed over and above that amount.</p> <p>This is turned on by a system setting called ClientNoticeBalanceRingFencedDebtFirst.</p>  <p>For more details on how to use this setting, please contact CPL support quoting YT-9986.</p>
9926	New Feature	Court Ledger, Add New Field Memo Transaction Balance	<p>We have added a Memo Balance to the Court Ledger. A Memo Balance is the account balance which has not been adjusted for deposits and withdrawals. This will display the sum of the entries in the Memo Transactions tab which can be found in the Amend Court Ledger window.</p> 

9962	Change	Float payments reducing one-off payments	<p>A client who is set up for a one-off float payment will now register as being partially or fully paid on their balances if a part or full repayment for the float has been made.</p>  
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10049	Change	Reinstate Client Instalment Report	<p>As requested, we have re-instated the Client Instalment Report in the Clients Reports menu.</p> 
10074	New Feature	In-Tray - Add Job Number to Post Proposed Invoice	<p>We have added a 'job' field to the Post Proposed Invoice window inside the In-Tray module. This will be available when you are posting to a PL account. We have also renamed the labels throughout CPL to 'Jobs' for better consistency and ease of use.</p>

Scanned Documents In-Tray

Record Type: **Jobs** Search Type: **Any** Tray: **Invoices Received** **Post**

Search Text:

☐ Show User Portfolio Only ☒ Show Current Only

User: **Administrator** ☐ Auto-Open Record

Status: **Received**

Reference	Description	File	Scanned Date
0307901	DEV 0613 (Building Company 67) - Could you please check the common roof for any leaks and repair as requi		
0312601	DEV 0669 (Insurance Company 1013) - Please inspect intermittent fire alarm fault. Please inform AHS Invernes		
0314001	DEV 0527 (Gas Company 53) - Remove Moss from all pathsRemove cuttings from bordersTidy and hoe raised		
0318701	DEV 0615 (Insurance Company 1013) - Please rest the fire alarm system as all the fire doors and windows are		
0321101	DEV 0647 (Plumbing Company 27) - Please shorten the time on the communal lighting by 5 minutes.		
0336301	DEV 0211 (Building Co. Alpha 31) - Please inspect/repair service button.	<input checked="" type="checkbox"/> Invoice 221482.pdf	29/11/2019 13:19
0336401	DEV 0015 (Gas Company 17) - Please inspect communal aerial as resident at No 23 reports to have no TV sig		

Post Proposed Invoice

Repair Date: **November 2019** PL Account: **Building Co. Alpha 31**

Invoice Date: **29 November 2019** Job: **0336301 Please inspect/repair service button.**

From: **29 November 2019** To: **29 November 2019**

Goods £: VAT £: VAT Rate: **0**

Total £:

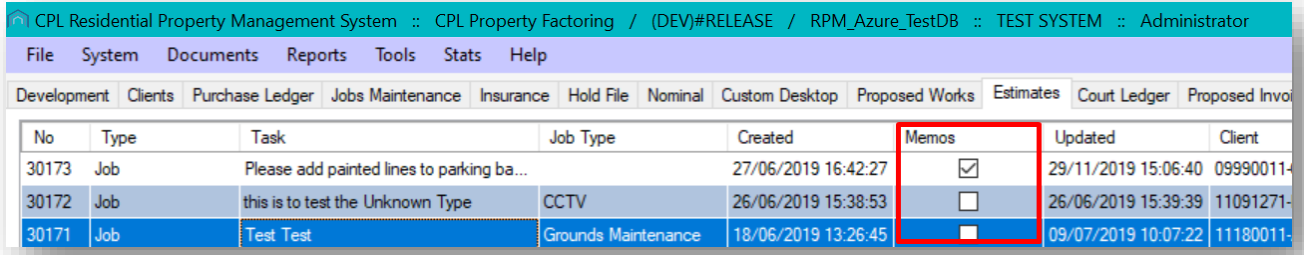
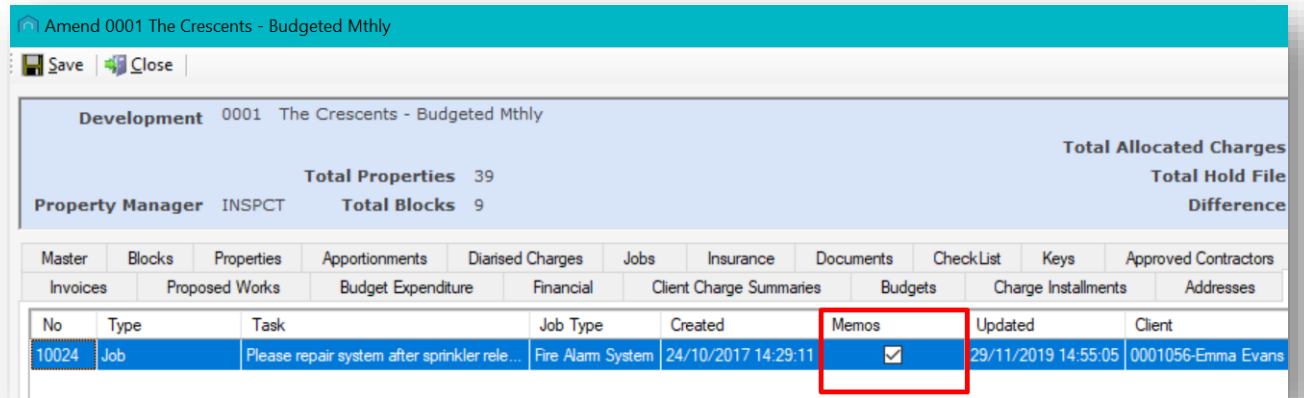
Invoice Number: Charge Type:

Description: **Please inspect/repair service button.**

Press F5 for Standard Descriptions

Notes:

JOBS

Number	Type	Title	Overview
9924	New Feature	Add notes column to Development Estimates	<p>We have added a 'has memo' column to both the main Estimates tab and the Estimates tab in a Development screen. This will give an indication of any memos available for an Estimate.</p>  
10046	Change	Printing a Work order on the Jobs screen moves a Completed\ Cancelled job back to "Job In Progress"	<p>We have changed an error where using the Print Work Order or Email Work Order buttons would change the Job status to JIP, regardless of whether they were completed or cancelled.</p>



9915

New
FeatureAllow users to set jobs to
'Internally complete'

If a Job is marked as either a JIP (job in Progress) or a CAI (Completed Awaiting Invoice) status you will now be able to select a button on the Jobs screen to put the job into an INC (Internally Completed) status. Upon clicking this you will see an alert box requesting you confirm the action.

Job for Development: 1111 Developers Glasgow Development

Job	R54936	Task	2
Order	R5493602	Status	JIP
Development	1111 Developers Glasgow Development	Stage	2
Property	Zac Rogers		

Warnings **There are (4) W/M Contracts associated with this Development.** Notices
Email sent to Painter_3@test.co.uk
Email sent to Painter_4@test.ie
Email sent to Painter_6@test.ie
Email sent to Painter_5@test.ie
Email sent to ZacRogers@test.ie
Work Order Sent by Email

Stage 1: Create Job Stage 2: Create Work Order Stage 3: Complete Work Order Job Memos Documents Comments

Stage3: Complete Work Order

Contractor: 1001 Painter Painting by Nums [See Invoice](#)

Arrival On Site Date: 29/11/2019 Job Completion Date: 29/11/2019 Time Taken: 0 Day(s) 0 Hour(s) 0 Minute(s)

Arrival On Site Time: 15:11 Job Completion Time: 15:11

Job Completed ☐ YES ☐ NO

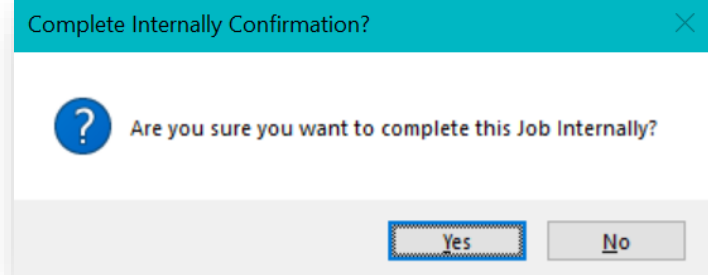
Description: Paint parking bay lines in East Car Park of property.

Press F5 for Standard Descriptions

☒ Complete Internally

Completed By: Not Completed

View Contracts View Memos View Development Print Work Order Email Work Order Cancel Complete Work Order Email RAMs



CPL Residential Property Management System :: CPL Property Factoring / (DEV)#RELEASE / RPM_Azure_TestDB :: TEST SYSTEM :: Administrator

Order	Completed Date	Job	Date/Time	Development	Priority	Job Type	PL Account	Status
M5494201		M54942	28/11/2019 17:52	0008 Dev 8 - UniqAcc	Urgent (1d)	Tree Surg...	Gardening Comp...	INC
R5493602		R54936	14/08/2019 12:26	1111 Developers Glasgow Development	Casual (7d)	Painter	Painting by Nums	INC



10068	Change	Proposed Work status not progressing when the job is completed	<p>A change has been made with regards to Jobs and Proposed Works and the statuses shown at various points in the process. Previously, Proposed Works were sometimes displaying the status WIP (Work in Progress) despite any connected jobs having been completed and these connected jobs displaying as CAI (Completed Awaiting Invoice) or having moved onto the invoice being posted or EXC (External Completed).</p> <p>This has now been changed to allow the proposed work to be set as completed on both the job being in progress (JIP) moving to CAI and CAI moving to EXC statuses. This will mean that the View Job button in the Proposed Work screens will always be enabled as long as there is a job attached and will not depend on the status of that job.</p>
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Please note, these release notes and the information contained within is subject to change until client-wide roll out in early January 2020.

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