



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS  
& BLOCK MANAGERS

# RELEASE NOTES

## CPL – VERSION 2.54

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## INTRODUCTION

This document contains a list of new functionalities available in the 2.54 version of CPL Property Management Software from CPL Software. It also contains a note of new modules available as well as Issues fixed in this release.

This release of CPL contains a number of additional features and updated items.  
Please contact CPL Software should you require any additional training for this release.

## ADDITIONAL FEATURES

### 9859 CPL REBRAND

RPM has now become CPL. A few months back we noticed a lot of our clients referring to the Software by our Company name and decided that it sounded good. The software is exactly the same however now it has a shiny new name to go with our lovely new logo.

### 8295 WEB PORTAL BUDGET TAB BUDGET TOTAL DIFFERENCES

We have revised the Budget Totalling System within CPL so that the Budget Reconciliation and the Web Portal Budget Tab totals will now tally to the same amount.

### 8809 ADDITION OF A REVERSE FLOAT REPAYMENT BUTTON WHEN DELETING SALES

As Requested by our clients, we have added an easier method for managing your float repayments. Previously when a Sale needed to be deleted but the Float had already been refunded, multiple steps were needed to be made to rebalance the Clients Float separately to the Reversal of the Sale. This can be fairly complex to understand and time consuming. Now these late repayments can be processed in a much simpler manner.

### 9408 NEW WARNING WHEN TRANSACTION DATE IS MORE THAN 30 DAYS IN THE FUTURE.

We have added a new warning to the system for transactions with a long lead time.

This will affect 3 areas:

- Purchase postings (all posting types)
- Proposed Invoice Posting
- Client Payment Posting

If the transaction date is more than 30 days in the future, a warning message will display. 'The selected transaction date is more than 30 days in the future. Are you sure you want to continue'

Yes - Carry on with posting

No - Cancel posting.

### 9801 ADDED A FILTER TO CLIENT NOTICES ALLOWING YOU TO SELECT BY CREDIT CONTROL STATUS.

We have added a new filter to the Client Notices screen. This new option allows you to filter your Client Notices further by Client Credit Control Status Type.

### 9907 ADDED NEW COLUMNS TO GRID VIEW IN CLIENT NOTICES.

We Have added two new columns to the grid view in Client Notices.

The first shows how many times the client has been sent the type of notice being run and as such only totals the type of Notice currently loaded in Client Notices.

The Second Details the Client Exit Date if they have one.

### 9875 MANUAL POSTINGS TO CONTROL ACCOUNTS

We have removed the ability to manually post to Control Accounts from CPL.

This will result in less nominal errors.

### **9873 NEW ALLOCATE AND WRITE OFF METHOD IN REGARDS TO THE HOLD FILE.**

We have added a new method for writing off entries on the Hold File.

Previously you would have had to complete this process manually.

After this change you will be able to do the following to write off an entry:

Select the correct entry in the Hold File and right-click it, opening the right click menu, choose the option Write Off.

The system will then post the opposite Hold File entry. It will then set them both to allocated (ignored) and make all relevant Postings to your Nominals.

The System will also automatically email the address you have set with a summary of what has been written off and by whom. The user will also receive a copy of this email.

In order for this to operate:

- The entry in the Hold File must be set to a Normal Status.
- You must have the correct permission set ('AllocateAndWriteOffJournal').
- An email for a notification to be sent to must be set under the setting 'AllocateAndWriteOffJournalEmailAddress' in System Settings.

### **9817 ADDED A SEARCH BOX TO DEVELOPMENT WARRANTIES/MAINTENANCE TAB IN A DEVELOPMENT.**

We have added a search box to Development Warranties in order to help you find Warranty Information entered on a Development. In order to find the search box, open the Development you wish to search, and click the Warranties/Maintenance Tab. The search box is at the top of the Guaranties/Maintenance /Contracts window. To use the search box, enter a keyword and click the Search icon and the results will be displayed in the grid below.

### **9711 PL (CONTRACTOR) EMAIL NEW TYPE "WARRANTY WORK ORDERS"**

On your PL Account Emails, we have implemented a new tick box called 'Used For Warranty Work'. If this checkbox is ticked, any jobs raised from a Development Warranty will be emailed to the selected email address. If this check box isn't ticked for any of the email addresses, the email will go to the address ticked for Work Orders as before. However, Jobs not raised from a Development Warranty will still go to the address ticked for Work Orders as before.

### **9667 INSURANCE POLICY SUM INCREASE: SELECT MULTIPLE POLICES AT ONCE.**

You may now select multiple policies to update on the Update Sum Insured Tab found on the Insurance Global Actions screen. The system will then list every Development covered by the selected policies. When you click on the policy drop-down menu, you will see there are now check boxes in the right-hand side. Select the polices you wish to include by ticking the boxes corresponding to each in the list.

### **9619 DEVELOPMENT WARRANTY EXPIRY REPORT FILTER ADDITIONS.**

We Have added the following optional filters to the Development Warranty Expiry Report:

- Warranty Job Type
- Office
- Inspector
- Overdue between dates
- Development

Allowing you better customisation of the data being returned when running this report.

### **9616 UPDATED THE EMAIL %CURRENT USER% KEYWORD TO NOW ENTER THE CURRENT USERS DISPLAY NAME.**

%CURRENT USER% under the email properties (System Parameters, Email Properties) has been updated to now insert the current user's Display name.

### **9709 ADD NEW FILTER TO CLIENT STATEMENT.**

We have added a new filter to the Client Statement Report in CPL.  
The new filter called Exclude Email Invoice Clients will allow you to exclude Clients who receive their invoices via Email.

### **9626 JOBS BUDGET HEADING DROP DOWN CHANGES.**

We have made a change to the Budget Headings drop down menu when raising a Job.  
When the system setting 'BudgetOnlyPostToAllocatedHeaders' is set, the Jobs Budget Heading dropdown box will only display budget headings that cover the period of the Job transaction date, unless the Development is not budgeted – in which case it will display all.  
When the system setting is not set, the system will display all Budget Headings as normal.

### **9625 NEW SYSTEM SETTING CALLED 'SALEDELETIONREFUNDAPPFEE'**

We have added a new System Setting called 'SaleDeletionRefundAppFee'. With this setting set, the system will act as it does currently when you delete a sale. A credit is added to the reinstated client to refund the apportionment fee they have been charged as part of the sale.  
When this setting is not set, the system will not refund the apportionment fee.

### **9960 BUDGET ITEMS NOW ALLOW NEGATIVE AMOUNTS.**

CPL will now accept negative amounts in the Budget Item Information box.  
You may want to do this to allow for Bank Interest for instance.

### **9886 DIRECT DEBIT CALCULATIONS NOW TAKE OUTSTANDING FLOATS INTO ACCOUNT.**

The Calculate Direct Debit System now includes outstanding Floats.  
Run your Direct Debit Calculations as normal and the Float will be included. If the Client queries the amount, the Calculate Direct Debit has a polite prompt for the user informing them there is an outstanding Float, the same information will be displayed on your payment portals for the Clients.

### **9925 TRANSFER OF PROPOSED INVOICE NOTES TO THE RESULTING PROPOSED WORKS**

Previously, when notes were added to a Proposed Invoice and then that Proposed Invoice was posted to the Hold File those notes would not transfer to the resulting Hold File.  
We have revised the system so that Now the notes are transferred between the Proposed Invoice and the Resulting Hold File.

## HOT FIXES FOR V2.53

### 9893 CLIENT STATEMENTS REPORT DOES NOT HAVE A CHECKBOX FOR EXCLUDING CEASED DEVELOPMENTS

We have added a new option called 'Exclude Ceased Developments' in the filter panel when generating Client Statement Reports that will enable you to filter out Ceased Developments. Check the Exclude Ceased Developments Checkbox to remove Ceased Developments from your report, untick the box to include them.

### 9876 CPL HELPER APP DUE BACK DATE IS YESTERDAY

The CPL Helper App is used to sign Keys In and Out.

Due to a bug introduced by Microsoft, during BST the App was taking an hour off. This means that although the App passes the date as today (with the time set to 00:00:00), the API reads that as meaning an hour earlier and sets it to 11pm yesterday. This doesn't happen during GMT, only during BST.

We have completed extensive revision work to the App and the time and date now work correctly.

### 9872 BUDGET INVOICE NOT EXCLUDING DELETED ITEMS

We have revised the budget invoice process and the system now excludes deleted items.

### 9863 DOCUMENTS FILTER BUG

We have resolved an issue with the Documents: Distribute screen where the Due Introductory Paperless DD Letter filter was not showing.

### 9547 CLIENT DETAILS NEW MAIL MERGE FIELD - OFFICENAME

We have Added the OfficeName field to the Client Details Mail Merge available fields.

### 9963 DIRECT DEBIT RUN POSTING ISSUES IN REGARDS TO ONE OFF AMOUNTS.

We have reviewed the process for one off Direct Debit Postings to ensure better accuracy between CPL and your bank exports.

### 9955 BUDGET HANDOVER INVOICES NOT LINKING TO PAYMENTS MADE FOR THE PERIOD.

Upon selling, CPL was not including any payments made of the period to the Budget Handover Invoice. This would mean the Budget Handover Invoice was sometimes incorrect. We have revised how the data for the invoice is provided and these will now be accurate going forward.

### 9981 SAME DAY PAYMENTS NOT BEING TAKEN INTO ACCOUNT ON CLIENT NOTICES.

We have found sometimes same day payments were not being included in the balance due when calculating Client Notices. This was caused by some user selectable settings in Client Notices controlling date and time., We have now revised the way these interact with the Client Notices and resolved the issue.

### 9904 PROPOSED WORKS STATUS CHANGING BACK TO ACF WHEN IT SHOULD NOT BE.

Once funds have been released from a specific Proposed Works, the Status of that Proposed Works should move to CAI – Completed Awaiting Invoice.

We found that upon clicking the Request Payment Icon the system would change the status to ACF – Awaiting Client Funds. Obviously, this was incorrect and as such we have resolved this issue. However, If the Proposed Works Status is anything other than CAI, the system will continue to operate as it does currently and will proceed to change the Status to ACF.

#### **9898 ERROR MESSAGE DISPLAYING WHEN PROCESSING BUDGET RECONCILIATION.**

An Error Message would display sometimes when Processing a Budget Reconciliation stating “Sequence Contains no Matching Elements” This was down to an unentered apportionments field. We have now altered the way CPL looks for this data and as such the error will no longer occur.

#### **9880 CLIENT TRANSACTION DATE SETTING INCORRECTLY ON BUDGETED ACCOUNTS.**

When Making a sale for a Budgeted Property the Transaction Dates on the pro-rated invoices sometimes were incorrect. We have resolved this issue with a change to the way the information is sourced in CPL.

#### **9970 PAPER FEES EXCLUDED FROM HANDOVERS.**

Handover Fees will now be excluded from Handovers so they are no longer pro-rated on sales.

#### **9900 DEVELOPMENT WARRANTIES JOBS OVERDUE REPORT.**

Previously Cancelled jobs were being included in the Jobs Overdue Report. We have now updated the way the system gathers information for this report so the cancelled jobs will no longer be included.

#### **9929 DELETED ITEMS SHOWING ON ESTIMATED BUDGET REPORT.**

Previously the Estimated Budget Report would include any Budget Headings that had been deleted. We have updated the Estimate Budget Report to no longer include these.

#### **9964 TIMEOUTS IN CLIENT ADVANCED SEARCH.**

We have resolved the timeout issue in the Client Advanced Search function. Please remember that searching can take a long period of time however due to the nature of the search.

#### **9914 EMAIL CC PROPERTY MANAGER WORK ORDERS.**

We have added a new System Setting called 'WorkOrdersCCPropertyManager' to determine whether or not Work Order emails are automatically CC'd via email to the Property Manager. the Default status of this setting is Off.

#### **9932 PROPOSED WORKS NOT RELEASING EXCESS FUNDS SOMETIMES AFTER JOB COMPLETION.**

Previously the Proposed Works system due to a particular selection of settings could find itself unable to release the excess funds. We have now revised the way Proposed Works Payments works inside CPL and as such resolved the issue.

#### **9992 INTRAY LINKING AND REALLOCATION ISSUES.**

We have added better error handling for In-Tray Linking and Reallocating problems. Please note you might still get a 'Success' message after being told of the error: this will be revised again in release 2.55.

**END**