CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

CPL RELEASE NOTES

VERSIONS 2.59.12 – 2.59.14

JULY 2023

CONTENTS

INTRODUCTION

Welcome to the notes accompanying sub-versions of CPL's 2.59 Release.

This document contains a list of new features and changes implemented in Releases 2.59.12 to 2.59.14.

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:
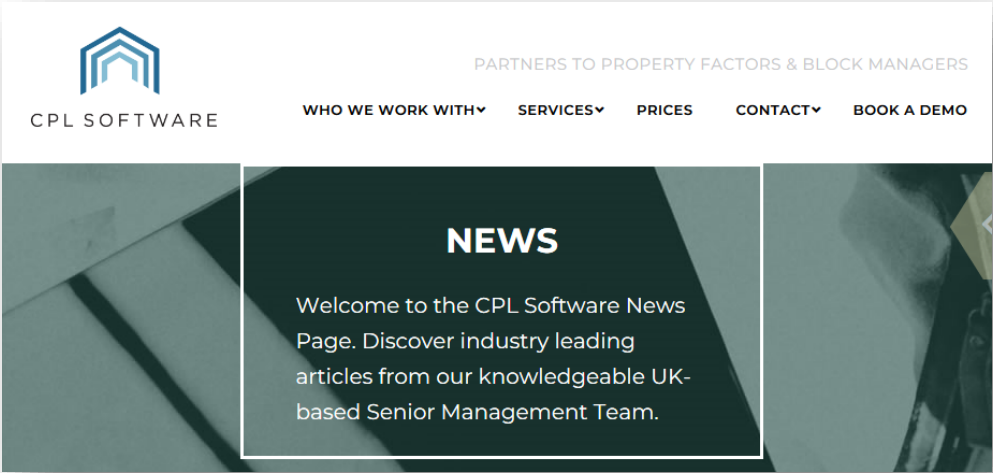
Core System

Financial

Jobs

Property Management

These Release Notes will be available in the CPL Knowledge Base.

All CPL releases also include many background improvements made to existing features in CPL which may not be listed here.

Please note that in this release, several new features have required additional description. To keep the Release Notes document to a more manageable length separate helpsheets and training guides have been created and added to the Knowledge Base for these items. Where this is relevant, a summary of the feature is included in this document along with a link to the location of the Helpsheet or Training Guide in the Knowledge Base.

Release Sub-Version and Item Number	Type	Title	Overview
2.59.14 728	Fix	Performance Issue - Selecting Search Filters After Clicking to Highlight in the Master Grid	It had been discovered that in some rare occasions when a user clicked on a master search grid in one of the main CPL tabs and then clicked into the text box on the search filters, there could be a slight delay experienced. This has been improved and users will no longer experience this.
2.59.14 616	Feature	CPL News Popup	This is a new feature which will open the CPL Software website when you first log into CPL. This will pop open the CPL Software News webpage in a browser window to enable you to stay up to date with all CPL information and developments. This will be controlled by a system setting which by default will be turned on. *Please contact CPL Support if you would like this to be configured to be off.*

Release Sub-Version and Item Number	Type	Title	Overview
2.59.12 504	Fix	Telephone Payments Don't Ask if it's a Proposed Work Only Payment	When you make a payment to a proposed work through the Daily Posting screen and an amount is entered into the **Post Amount** field, CPL will alert you to ask if the payment is for a proposed work only. If you click on **Yes**, CPL will zero the **Post Amount** which may have been entered incorrectly and will only post the Proposed Works amount. However, if you are set up with CPL to make Credit Card Telephone payments, then it was discovered that under the same set of circumstances CPL was not asking this. A fix has been applied so that CPL will now ask this question no matter which payment type is used.
2.59.12 502	Fix	Auto Resolve Credit Control Status Not Being Triggered On Credit Invoices	When you set a client to a credit control status that is ticked to **Resolve When Clear** then you would expect the credit control status to resolve to normal when the client has a current balance in credit.

It was discovered that if the balance was cleared by posting a credit invoice, through an Amended Account, or the standard Actual Invoice, or a Purchase Ledger Posting straight to the client's Transaction File then the credit control status was not resolving back to normal.

A fix has been put in place to make sure that this does happen in the above circumstances, and if the client associated with the transaction record has their current balance in credit, their credit control status will now be set to normal with a Credit Control Resolution record added. This would also be the case where it applies to multiple clients.

If the client in question has an outstanding float balance, then their current balance being in credit will not be enough to resolve the status to normal as the account will not be seen to be in credit due to the outstanding float amount.

| 2.59.12 499 | Fix | Data Import Client Search Screen Improvements | When importing a CSV of client payments, there is an option to click on the binoculars button to open a **Client Search** screen and then search for clients by their balance due.

Improvements have been made to this screen, including a clickable **Search** button to enable this search to run more quickly.

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2.59.12 507	Fix	Direct Debit Calculation Errors	The aim of the Direct Debit **Collection Amount** calculation made by CPL is to be able to have the client in enough credit to cover the invoice just before the invoice is raised. This should allow the client balance prior to the invoice being raised to be in credit for around the amount that the invoice will be raised for.

It has been noted that in some rare occasions the current calculation was adding on the monthly collection amount as well, therefore making it too high. The way the calculator works has been adjusted to avoid this.

2.59.13 478	Fix	Set PL Invoice to Un-Suspended When an Invoice Is Linked to A Diarised Charge Transaction in In-Tray	A new feature was developed as part of the 2.59.8 release which enabled the linkage of an invoice to a single diarised charge transaction through the In-Tray. This process associates an individual invoice or checklist with an individual diarised charge transaction thereby allowing it to be viewed in the Hold File and the PL Account Transactions tab.

There is a system setting called **Auto-Suspend Diarised Charges** which can be configured to mean that all diarised charge transactions are suspended by default.

If this system setting is in place and a diarised charge invoice is linked to a diarised charge transaction, then the linking of this invoice will remove the suspend status from the transaction and display a message to say that the suspend has been removed by the In-Tray linking process.

Please contact CPL Support if you would like us to make a change to this System Setting on your database.

2.59.13 459	Fix	Sinking Fund - Auto Increment Line Number	In the 2.59.6 release, a new Sinking Funds tool was released. Multiple sinking funds can be added to a development. These are added through the **Sinking Fund** tab on the Development if your database is configured to use this feature.

Previously, when creating an additional sinking fund, the line number had to be manually moved on to the next available number. This has been changed and when you create a second sinking fund, it will automatically be assigned to the next number for the development.

2.59.13 681	Fix	Development Master Tab Checking for Sinking Funds	Previously, when users had set a development tab other than the master tab to be the default load tab, the system wasn't checking successfully for whether Sinking Funds were configured to be switched on or off. This has been fixed and will now perform this check, no matter which development sub tab has been set as the default.

2.59.14 682	Feature	Data Imports Can Now Support .xml	Data Imports are now able to support **.xml** files when previously we could only support imports of **.csv** files.
2.59.13 678	Fix	Float Only Invoice - No Charge Type	New functionality was launched in Release 2.59.9 to allow the creation of a **Float Only** Invoice. This will be useful if a client has an outstanding float balance that you wished to recover separately from the normal charge date periods. It will create the invoice quickly and easily by moving the outstanding float balance to the Charge File and immediately creating a Float Only invoice which displays on the Transaction Activity tab. You will not have to generate the invoice for the charge yourself. If you have a Float Charge Type set up in your database, then this invoice will use that. However, if you don't have one set up then it will default to use the **Normal** charge type. This fixes the issue where the charge type was defaulting to null.
2.59.13 629	Fix	PL Transactions Posting Screen Showing Deleted Journal Codes	When making an **Apportionment Posting** in the **Purchase Ledger Transactions** screen, it was discovered that previously deleted Journal Codes were appearing in the drop-down menu for selection and this could obviously cause confusion. This has been fixed to ensure that deleted journal codes will no longer appear in the drop-down list.

2.59.13 628	Fix	Document Scan History – Diarised Charges	An issue was identified affecting diarised charge transactions which were posted with individual associated invoices. These associated invoices were being linked to different diarised transactions for the same diarised charge when they shouldn't have been. This was causing errors to appear when an individual associated invoice was viewed. This has been fixed and you will now only see the correct associated invoice for each diarised charge transaction.
2.59.13 617	Feature	Office Filter Added to Amended Accounts Screen	There is now an **Office** filter available in the **Amended Accounts** screen in the Client Global Actions menu. This will bring the Amended Accounts screen in line with other invoicing screens in the Client Global Actions menu.
2.59.13 620	Feature	Insurance Rate Description Matching Building Rate Amount System Setting	A new System Setting has been created called **Insurance Description Same As Rate**. When this is switched on, it will enable the insurance policy rate **Description** to match the **Building Rate Amount**.

			This should save duplicate rates being created when users have added their own policy rate description which has confused other users. *Please contact CPL Support if you would like us to make a change to the System Setting on your database.*
2.59.13 574	Fix	Insurance - Clients Covered, Shows Duplicate Properties When Sale Date Has Not Passed	It has been discovered that when a sale is being processed with a future date, both clients are showing in the **Clients Covered** sub tab within the **Insurance** tab in the development. This means that the same property is appearing twice, once for each client. The Clients Covered list should in fact only show the current client in the property as of the date it is accessed. A fix has been put in place and the Clients Covered list will now only show the client currently in the property on that date.
2.59.13 573	Fix	Client Cheque Narrative Changing Incorrectly	An issue was discovered relating to batch cheque postings from the **Daily Posting for Client** screen. On this screen, when the **Payment Type** is set to **Cheque** and the **Dr/Cr** field is set to **Dr**, then the **Description/Narrative** will change to **Payment To Client - Cheque**. However, after posting your first payment and then selecting the next client to post a cheque to, the description was reverting back to **Payment Received**. This could previously be rectified by changing either of the drop-down menus but this should not have been occurring. This has now been rectified and the description/narrative will now remain as **Payment To Client – Cheque** when switching to another client to make an additional cheque posting.

2.59.13 512	Feature	Court Ledger - Additional Fields	Additional fields have been added to the Court Ledger Module to make this more flexible for customer use. These are listed below. • Service by post (date field) • Service by Sheriff Officer (date field) • Last date for service (date field) • Last date for response (date field) • Court Expenses (text field / numerical, maximum 8 digits) • Court reference (text field, maximum 20 characters) • Time to pay order (text field, maximum 20 characters) • Instalment arrangement (Picklist Y/N) • Sheriff Officers (text field, maximum 30 characters)
2.59.13 513	Feature	Court Ledger - Documents Tab Added	A **Documents** tab has been added to the Court Ledger module. This will be available in every court ledger created which will enable users to receive relevant documents into the tab for storage.

| 2.59.14 732 | Feature | Naming of BACS & DD Files | BACS Exports for both Purchase Ledger Payments and Direct Debits will now have the date the CSV was generated added to the file name to make it easier for users to distinguish between them. |

The date format used will be **ddmmyyyy**.

| 2.59.14 477 | Fix | Raising a Global Dispute Not Showing Correct Drop-Down Options | The default name for a global dispute in CPL is **Global Dispute**. It has been discovered that if it remains as this name within CPL it operates correctly in terms of providing the appropriate drop-down options for the **Dispute Level** and the **Department**. |

However, CPL users are permitted to change this description and also to set up new Credit Control Types/ Statuses. These can also be set with a **Status Weight** of **Global Dispute** and with the **Allow Batch Filter** option applied within the **Credit Control Types** menu in the **System Parameters**.

It had been noted that if users raise a Global Dispute through a client via the **Credit Control** tab, using a different description for their own custom dispute, the correct drop-down menu options were not appearing.

Any user-amended or user-created credit control type with global dispute selected as the status weight will now display the correct options when raised.
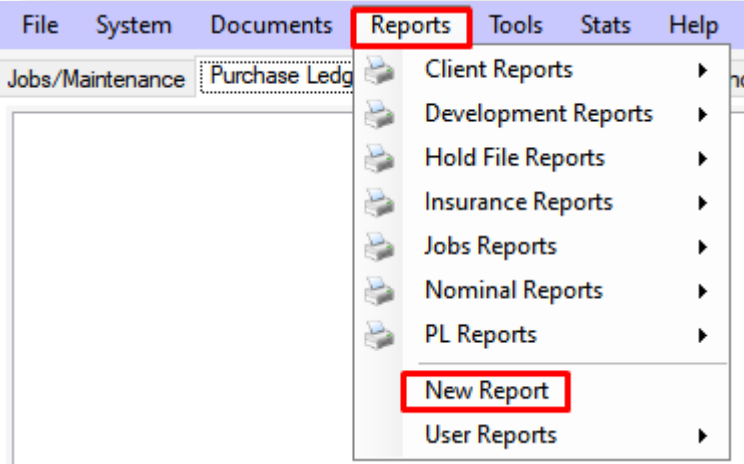
2.59.14 440	Addition to Feature	Unreconciled Payments User Report Focus – Columns Added for Client Account and Development Number	In the 2.59.9 release a User Report Focus was added to the User Category called **Unreconciled Payment Summary**. Additional column headings have been added to this focus for the **Client Account Number** and the **Development ID** to be able to be used in the report.

To create any new user report, click on **Reports** and then the **New Report** option.
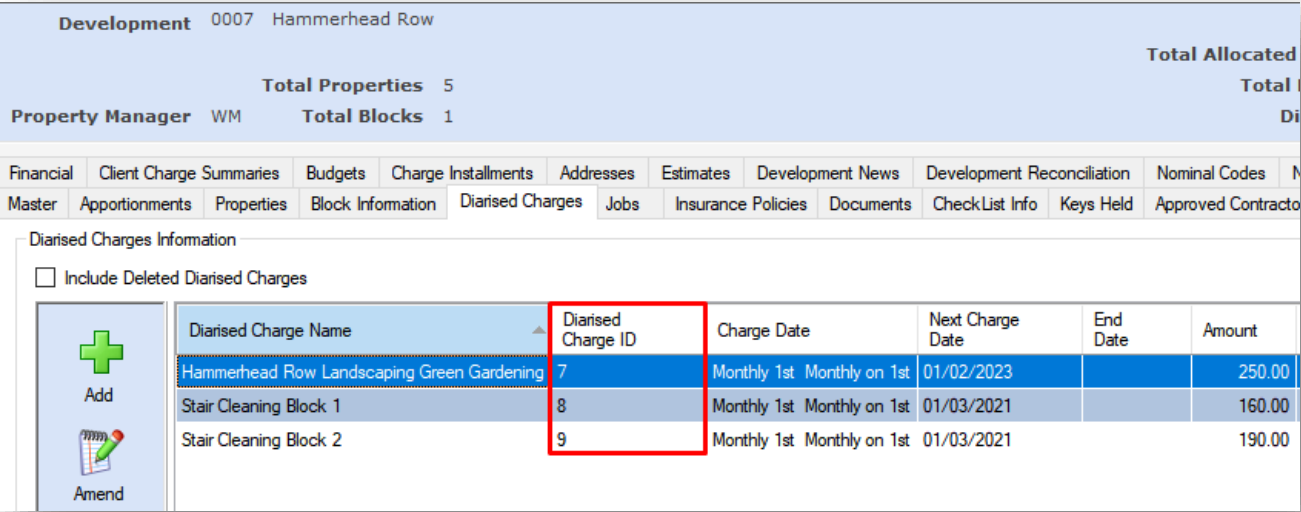
This will open the User Report Wizard.

Set the **Category** to be **User** and then you will be able to use the **Focus** filter to be the new **Unreconciled Payments Summary** focus.

2.59.14 775	Feature	Diarised Charge ID Added to Development - Diarised Charges User Report Focus	In the 2.59.11 Release a Diarised Charge ID feature was added. This ID could be given to contractors to quote on their invoices to make it easier to match invoices against individual instances of the diarised charge.

This ID can also be viewed in the In-Tray when matching contracts or invoices:

This Diarised Charge ID has now been added as an available column to the User Report for the **Diarised Charges** focus.
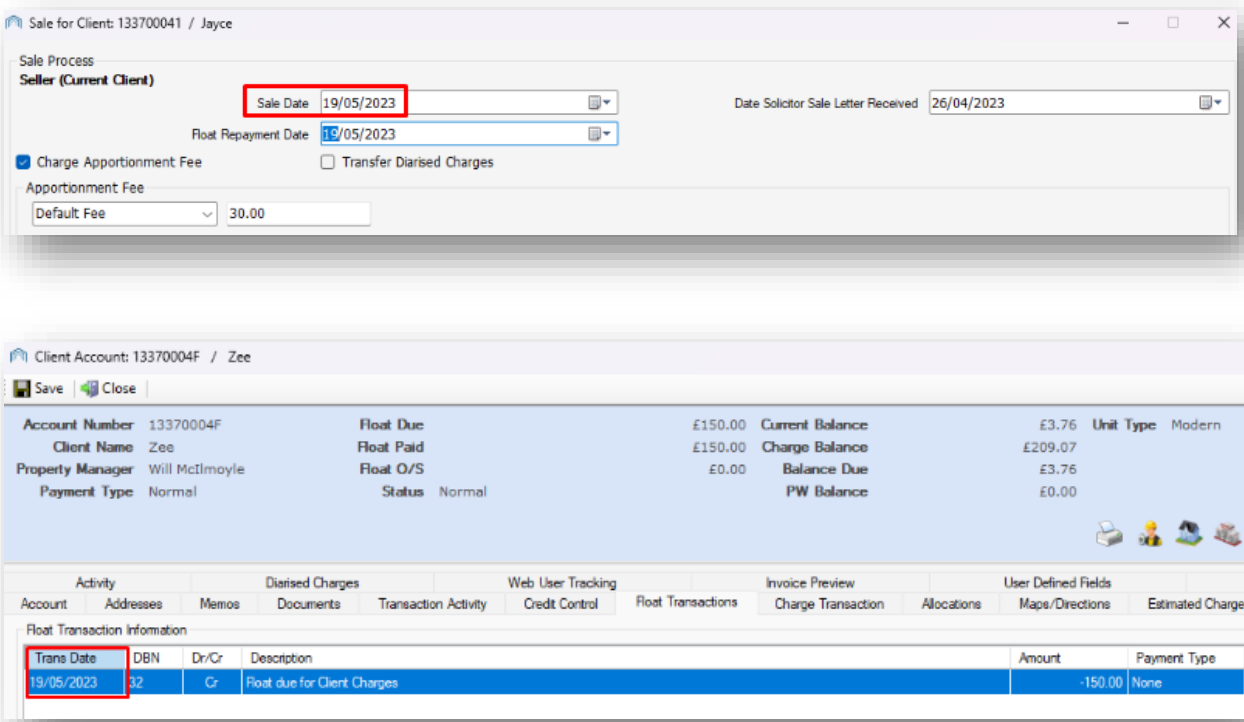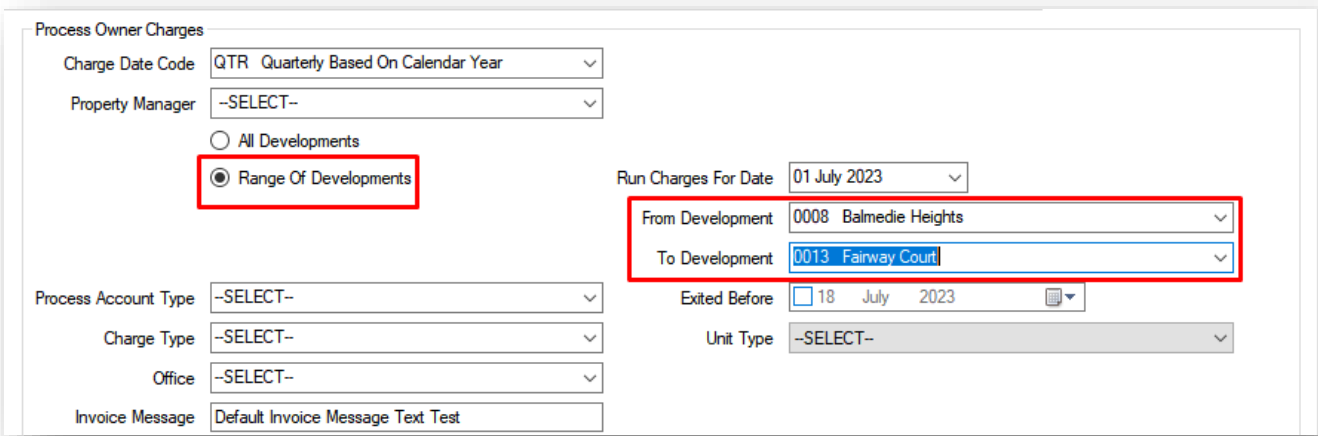
As a reminder, to create any new user report, click on **Reports** and then the **New Report** option.
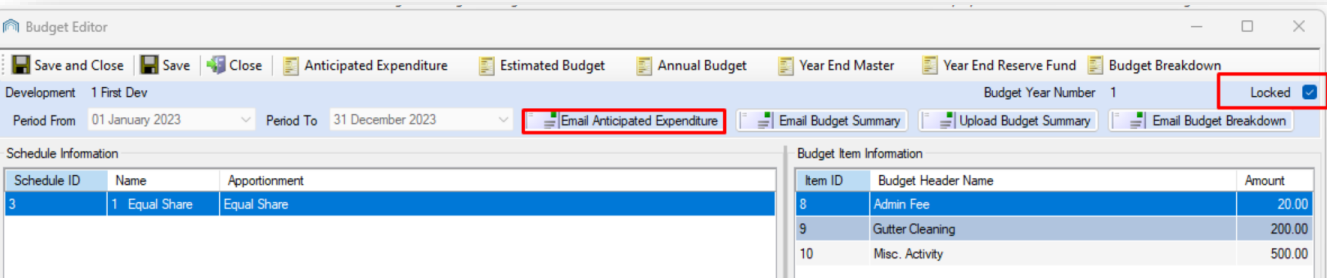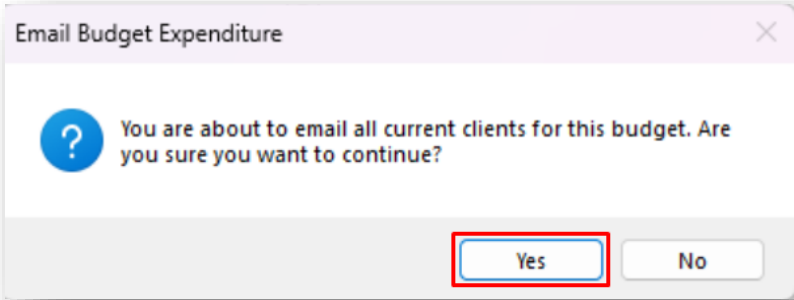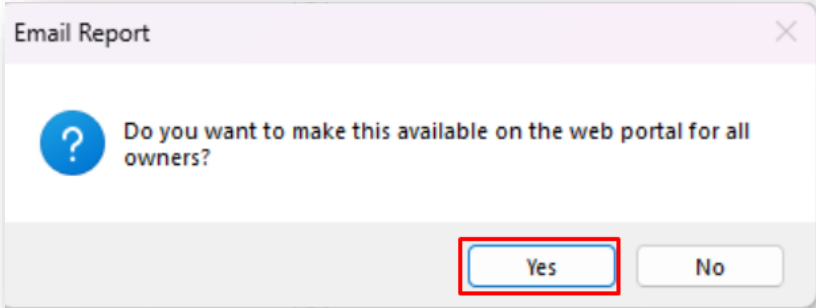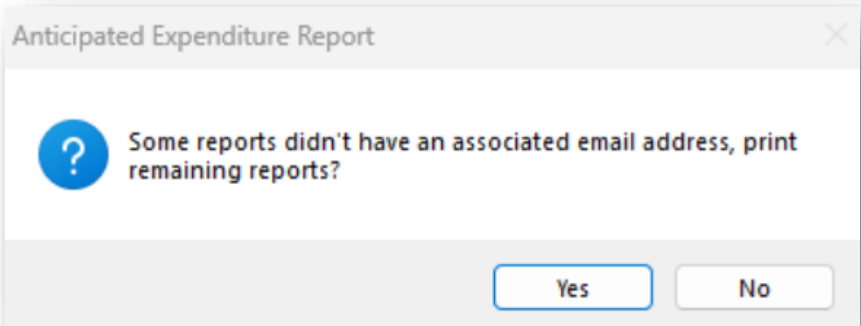
This will open the User Report Wizard.

Set the **Category** to be **Development** and then you will be able to use the **Focus** filter to select the **Diarised Charges** focus.

You will see the new **Diarised Charge ID** as an available column.
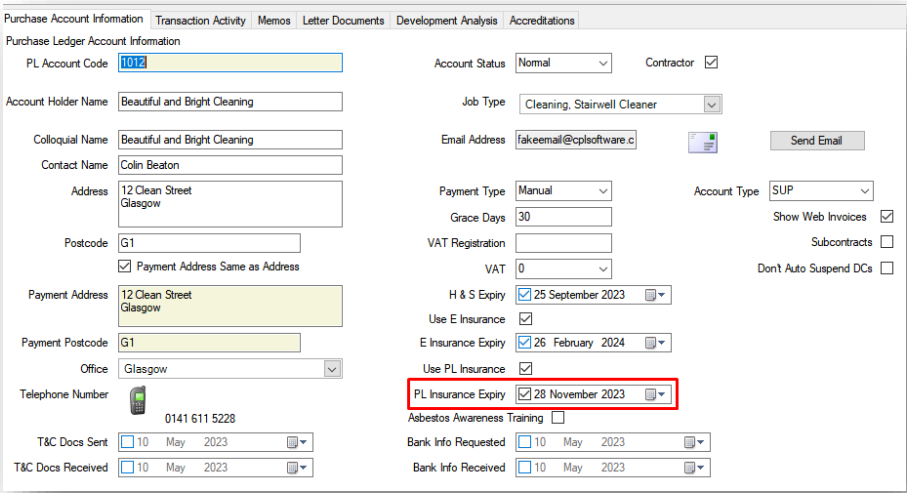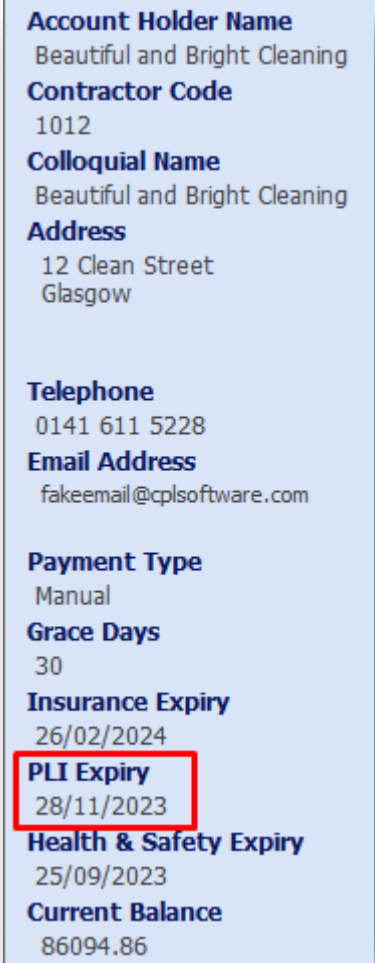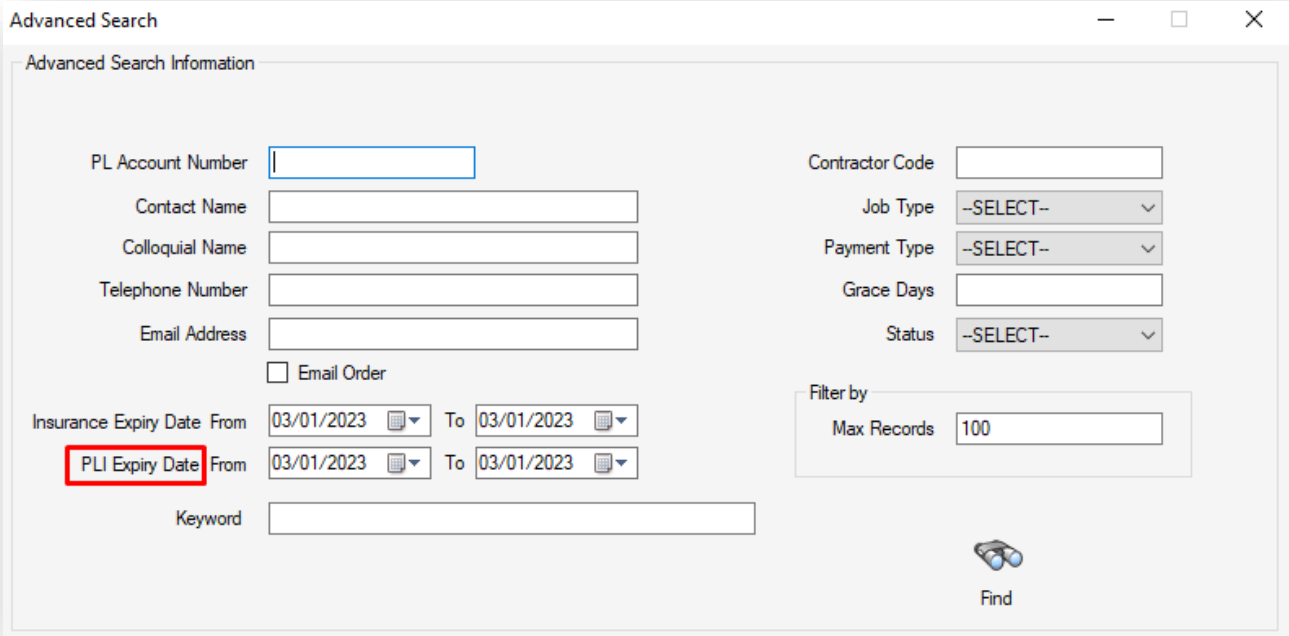
| 2.59.14 591 | Fix | Proposed Invoice Tab Search | We have implemented improvements which will enhance the performance of the Proposed Invoices screen search functionality. You will notice that the grid itself and any searches you run will now be faster. |
| 2.59.14 619 | Fix | Float Charge Date Change | If your company is using the **Charge Float Out to New Clients** System Setting, we have made a change to the float charge process.

If you have this system setting switched on, then when a sale is processed, the buyer's Float Transaction file will be credited for the amount of the property float and their charge file will be debited for this same amount. This enables the charge for the float to be picked up with other charges from the client account to appear on the client invoice.

The client entry date will now be used as the transaction date for the float charge. |

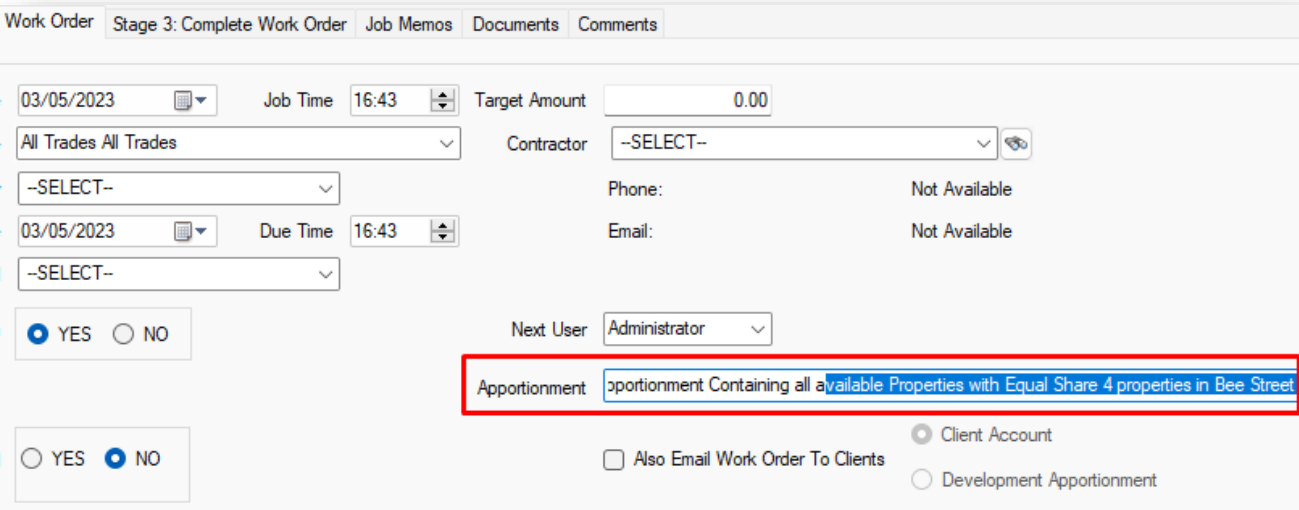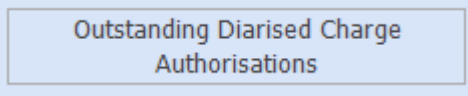| 2.59.14 686	Fix	Budget Invoice Reversals Do Not Reverse Pro-Rated Invoices Created by Sales	When a sale is processed for a property on a budgeted development mid-way through a budget term which has already been invoiced to the seller, CPL will perform a pro-rate process. This will credit the seller and debit the buyer for the relevant dates and a Handover Budget Invoice will be created for the buyer. If the original budget invoice is then reversed, it has been discovered that the seller's original invoice is removed but the credit and the debit for the pro-rate process was remaining. This is incorrect as it should have been removed as this also prevents the budget invoice from being re-run on that property. Reversing the Budget Invoice batch will now also correctly reverse the pro-rated charges created by a sale.
2.59.16 Included in 2.59.11 and 2.59.14 releases 807 908	Feature	Insurance Building Policy Interest Charges Addition	A new feature has been developed which will help companies offer alternatives to their clients when they are processing their insurance charges. Existing functionality allows for interest to be charged to clients on the policy if relevant when insurance charges are being spread throughout the term but there will now be an option which will allow you to enable some clients on the same policy who may choose to make an annual payment pre-renewal to avoid being charged any interest. In order to be able to make use of this new feature, you would need to ask CPL Support to activate a new System Setting in your database called **Bill Insurance Annual In Advance**. For further information on how this new feature works, please refer to the **Helpsheet - Insurance Building Policy Interest Charges Addition** which can be found in the CPL Knowledge Base by clicking here.
2.59.16 Included in 2.59.11 and 2.59.14 releases 960	Fix	Process Owners Charges Filtering on Wrong Charge Date Code	An issue was identified with the **From** and **To** drop-down menu fields when **Range of Developments** is selected in the **Process Owner Charge for Actual** screen. This appeared to be filtering on the new management fee charge date codes instead of the original development charge date codes. This has been rectified and returned to filtering on the main development charge date codes.
2.59.16 Included in 2.59.14 release 1138	Fix	Budget Reconciliation Process Pulling Incorrect Previous Value Amount	An issue was identified where the Budget Reconciliation Invoice was not correctly pulling the latest brought forward-balance after a property sale had been processed and Handover Budget Invoices were produced. This has now been rectified.
2.59.16 Included in 2.59.11 and 2.59.14 releases 1007	Fix	Management Fee Prelist Showing Non-Live Developments	It was discovered that Management Fee Prelists were displaying clients from developments which had not yet been switched to live. This has now been rectified.
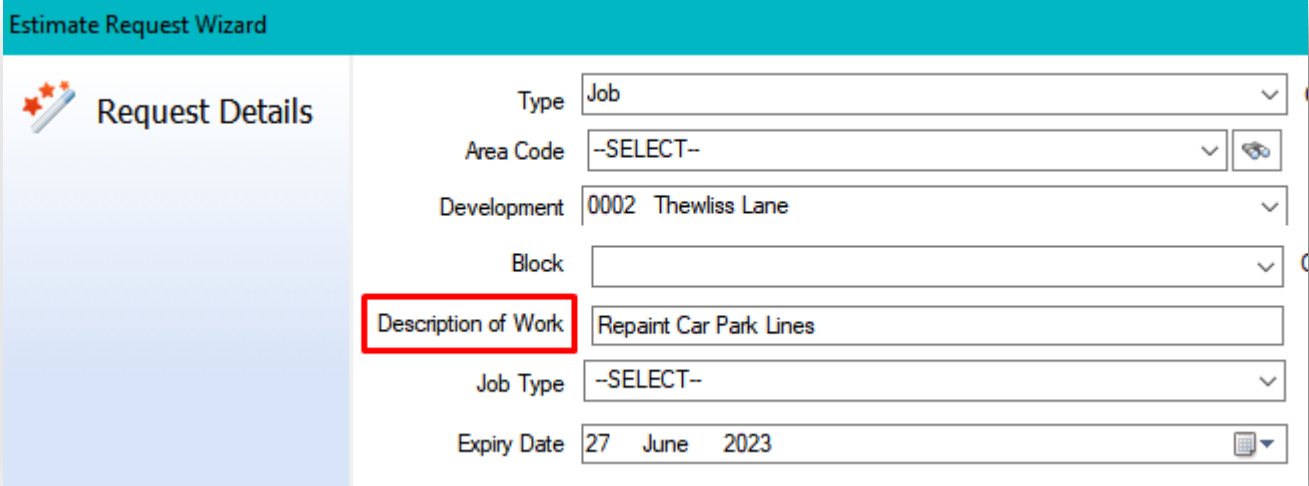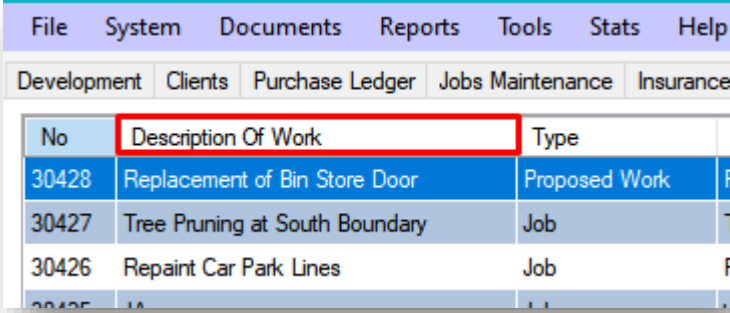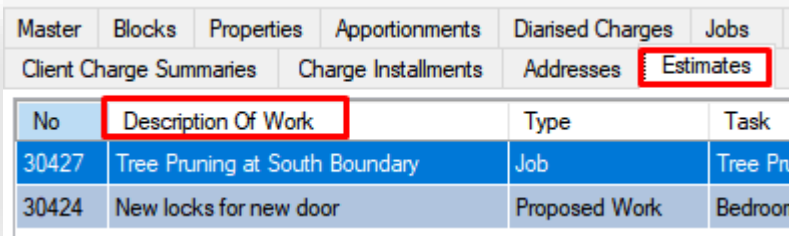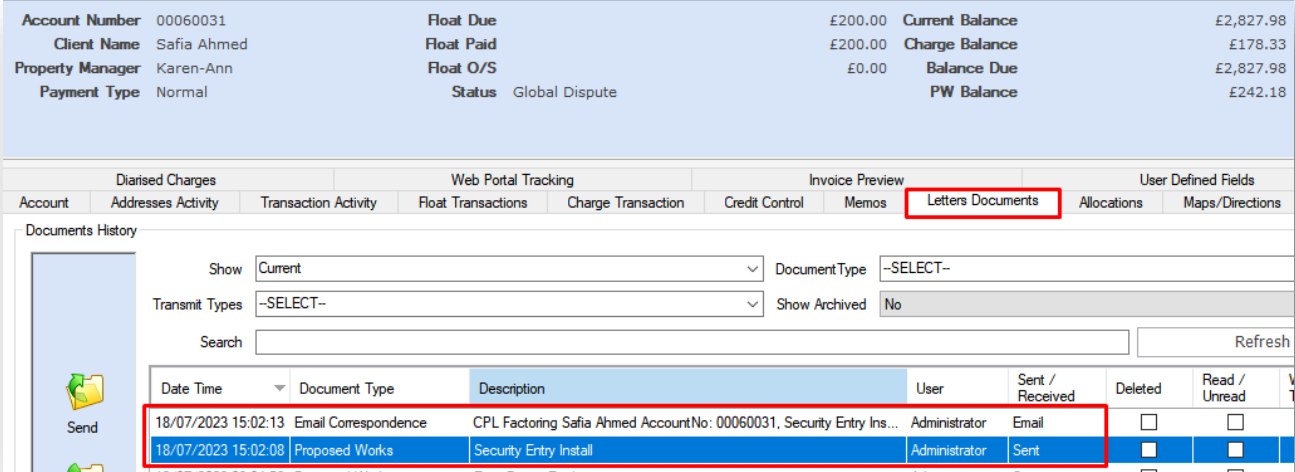
| 2.59.16 Included in 2.59.14 release

1142 | Feature | Budget Anticipated Expenditure Email Button | Various budgeted development improvement features have been developed as part of the last few releases to enable you to keep your clients better informed. As a follow-up to these we have now introduced a new feature to enable the emailing of an **Anticipated Expenditure Report** and to be able to have this made available on the Documents tab of your client web portal.

Your budget must be saved and locked and once this is the case, you will see that the **Email Anticipated Expenditure** button is no longer greyed-out.

When you click on the button, you will be presented with an **Email Budget Expenditure** confirmation message.

Click on **Yes** and you will be asked to confirm if you would also like to make the report available on the client web portal.

Click **Yes** or **No** depending upon your preference and CPL will then display the **Email Report Progress** which will create the report and email this out to all clients who have an email address configured for sending documents.

If there are clients without an email address configured, you will be presented with a notification asking if you would like to print the report for the remaining clients to enable you to post this out.

Click on **Yes** if you would like to do this and a print dialogue report screen will open.

The report will also appear in the **Documents** tab on your client web portal. Please see below about configuring which **Web Document Type** this will appear under.

If you wish to use this functionality, you will need to contact CPL Support to request that two System Settings are configured. The **Enable Email Budget Breakdown Report** option must be turned on to enable the Email Anticipated Expenditure button and you will need to have the **Budget Email Report Web Document Type** set for one of your Web Document Types. |

| 2.59.23 Included in 2.59.11 and 2.59.14 releases 351 | Feature | Exited Client Bank Info – New Global Process Additional Features | We developed a new Exited DD Client Details feature as part of the 2.59.8 release. This was designed in order to enable you to maintain better 'housekeeping' for exited client accounts who are set on the Direct Debit payment type. It allowed you to run a bulk process to remove all direct debit details from exited client accounts and set them back to the **Normal** payment type.

An exit date could be set to enable you to pick up all DD clients who had exited prior to that date or you could leave this blank and search for **all** exited DD clients. There was also an option to display only clients with zero balances should you wish.

We have now made further improvements to how this feature operates. We have redesigned and renamed the feature to enable it to check for all exited clients with bank details entered on their account.

It will now appear as **Exited Client Bank Info** and the process will now check for the following:

- All exited clients no matter what their payment type is set to
- Clients with banking details saved on their account
- Clients who have exited prior to a set date (optional)
- Clients with/without a zero balance (optional)

The process also gives you the option to select/deselect the clients you wish to process.

When you run the process, CPL will clear banking details from the client accounts and change the payment type to **Normal** if this is not already the case.

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Release Sub-Version and Item Number	Type	Title	Overview
2.59.12 592	Fix	Update PL Insurance Label	Previously, although the **Purchase Account Information** tab of a PL Account had a field called **PL Insurance Expiry**, the pin panel for the account had this labelled as **CIS Expiry**. This has now been addressed and the pin panel will display this information as **PLI Expiry**. This field has also been updated on the Purchase Ledger **Advanced Search.**

| 2.59.12 588 | Fix | Job Stage 2 Apportionment Drop-Down Menu Width | The Apportionment drop-down menu has been resized to make it wider on Stage 2 of the Jobs screen to make it easier to identify individual apportionments.

This will now resize to fit the largest length of description for an apportionment in the selected development. It will display up to 127 characters and will also allow you to scroll through the text in the filter item to read all of the text if it is longer than that.

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|---|---|---|---|
| 2.59.12 200 | Fix | Blockworx - Approve/ Decline Implementation | When working with Blockworx contractors, there is an **Outstanding Diarised Charge Authorisation** tool within the pin panel of the main Purchase Ledger tab which is used to authorise the invoices or checklists submitted by your contractors.

If you choose to reject any of these, you will now be asked to provide a reason which will be submitted to the contractor and appear in the comments section of the individual record in their **Required Invoices** area in Blockworx.

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| 2.59.13 and 2.59.14

604 622 623 624 625 626 748 747 609 | New Feature | Planned Maintenance | We have created a new feature called Planned Maintenance to make it easier for you to schedule, keep track of and process recurring jobs without having to recreate these jobs every time. You may wish to use the Planned Maintenance module for regular jobs which get repeated such as gutter cleaning, external painter works, lift maintenance or mechanical and electrical maintenance. Once created, a Planned Maintenance record, when processed, will process the job all the way through, creating the work order, setting this to a Job in Progress status and if there's an email present in the PL Account it will also send off the work order to the contractor.

For further information on how this new feature works, please refer to the Planned Maintenance Training Guide which can be found in the CPL Knowledge Base by clicking here.

Please contact CPL Support if you wish us to enable Planned Maintenance in your CPL database. The Support Team can also configure the number of days before a planned maintenance is marked as outstanding for it to appear in the list to be processed. |

2.59.14 725	Fix	Estimate Request - Change Label Description	Previously, when creating an Estimate Request, there was a field called **Name**. This has now been changed to **Description of Work** to make this more user friendly. The column in the main Estimates grid and in the grid on an Estimates tab within a development has also been renamed to **Description of Work**.
2.59.14 587	Fix	Proposed Work Search Archived Status Change	Functionality within the Proposed Works module has been updated to mean that if a job for a Proposed Work is in **Completed Awaiting Invoice** (CAI) status, the proposed work will now display as **Archived** rather than **Current** in the main Proposed Work tab and in the Proposed Work tab within a development.
2.59.16 Included in 2.59.11 and 2.59.14 releases 919	Fix	Proposed Work Email Correspondence to Clients Doesn't Record in the Client Document Tab	It has been identified that when email correspondence is sent via a Proposed Work it was not displaying as sent on the Client Document tab. This has now been rectified and will appear correctly.
2.59.16 Included in 2.59.11 and 2.59.14 releases 1146	Fix	Development News Insurance Policy Filter	It had been identified that on rare occasions, when a Development News post was created in the Custom Desktop widget to be sent out to properties covered by an individual insurance policy that properties which weren't covered by that policy were being selected to receive the post. This has now been rectified and only relevant properties will be selected.

Release Sub-Version and Item Number	Type	Title	Overview
2.59.12 598	Fix	New Property Wizard - Green Fee	Green Fees are a more flexible version of the Paper Fees option in CPL which allow you to process a fee to be charged to clients without an email address which is ticked for use in both Document/Correspondence and Invoice distribution. Green Fees enable further flexibility than Paper Fees in that different fee amounts can be set against different Unit/Property types and they can also be edited for individual clients. Where a green fee had been set against an individual client account, it was discovered that when a change was made to this client record and this was being saved, it was over-writing the previous green fee amount with the default green fee amount from the unit type. This has now been fixed and the green fee value is no longer being over-written when saving the client account.
2.59.12 597	Fix	PL Transactions PL Account Dropdown Not Ordered by Alphabet on System Setting Set	There is a system setting within CPL called **Order by Alphabet** which enables PL Accounts to be ordered alphabetically when they appear in drop-down menu lists instead of being ordered by the PL Account Code. It was discovered that this was not operating as expected in the PL Transactions screen. This has now been fixed and if a database has the system setting applied to order PL Accounts alphabetically, then this is how they will appear in various drop-down menus in the system. This includes the following areas within CPL: • PL Account field in PL Transactions screen • Contractors filter in main Jobs Maintenance tab • Jobs tab in a development • Contractor field in Jobs screen *Please contact CPL Support if you would like us to make a change to this System Setting on your database.*

2.59.12 596	Fix	Client Contact Screen - Allow Saving with Empty Fields	Previously, CPL would not allow a Client Contact to be saved on a Client Account unless a title, first name and surname were entered.

We have changed the validation of the client contact so that only a first name or surname now need to be entered for the contact to be successfully saved.

2.59.12 595	Fix	Emails Sent Via Development Are Showing Duplicates on the Development Document Tab	It was discovered that where the **Send** option was being used on a development Documents tab and then the **Email/SMS** option being used in the Documents Distribute screen, the resulting email correspondence batch was not displaying correctly back onto the Documents tab itself.

This has been resolved and one row will now display for the whole email batch. When this is double-clicked it will display the first email in the batch.

| 2.59.12 470 | Feature | Additional Client Mail Merge Fields | Two new mail merge fields have been added to the **Client Details** mail merge view which can now be used within document templates to improve your client communication.

These new mail merge fields are **DHandoverDate** and **InspectionFrequency**. |
|---|---|---|---|

If used in a document template, these both draw their information from fields within the Development Master tab. These are the **Development Handover Date** and the **Inspection Frequency**.

The new fields will enable you to inform your clients about the handover date for the development and the inspection frequency you will be following.

Please see the information below for some background on using these tools within CPL.

Please note that you cannot set a Handover Date unless you have ticked the **Handover Complete** option on the development master tab. You will also need to contact CPL Support if you require anything other than the default inspection frequencies available in your database. Inspection frequencies are also used in conjunction with the **Inspections** tab on the development. This allows you to upload your inspection reports and mark the inspection as complete.

You can then use the **Inspections** widget on the **Custom Desktop** to be alerted to when the next inspection is due.

You can also create your own Development Inspections User Report to report on next inspection dates.

2.59.13 611	Fix	Document Inspections Amend is Overwriting the Documents Member Rows	Two linked issues had been observed when amending an inspection which had previously been uploaded to the development **Inspections** tab from INSPCT. The link to the specific development was being lost and the amendment was also resetting the inspection date to the current date.

These issues have now been resolved.

2.59.13 542	Feature	Development Key Requests - Add Block Name Field	Block information has been added to the Development Keys module to make it easier to work with.

Block information has been added to the Development Keys module to make it easier to work with.

When adding a new key on the **Keys Held** tab, there is now a **Block Number** field available which will display the entered address of each block in the development. Users can select from an **Entire Development** option or any existing block within the development.

There is also a **Block** column on the grid in the **Keys Held** tab which will display this relevant block information.

On the **Key Requests** tab, the grid will also display a **Block Name** column identifying the relevant block for each key requested.

2.59.13 662	Fix	Keys Checked Back In Not Logging Username	It was noted that when recording that keys have been checked back in on the **Keys Held** tab within a development, that the user who had processed this was not appearing on the grid.

It was noted that when recording that keys have been checked back in on the **Keys Held** tab within a development, that the user who had processed this was not appearing on the grid.

This has been resolved and the username for the relevant user will now appear in the grid.

2.59.14 603	Fix	Add Binocular Search to Contractor Drop Down On Keys	A binocular Search button has now been added to the **Contractor** field when processing key movement in the **Keys Held** tab of the **Keys** module within a development.
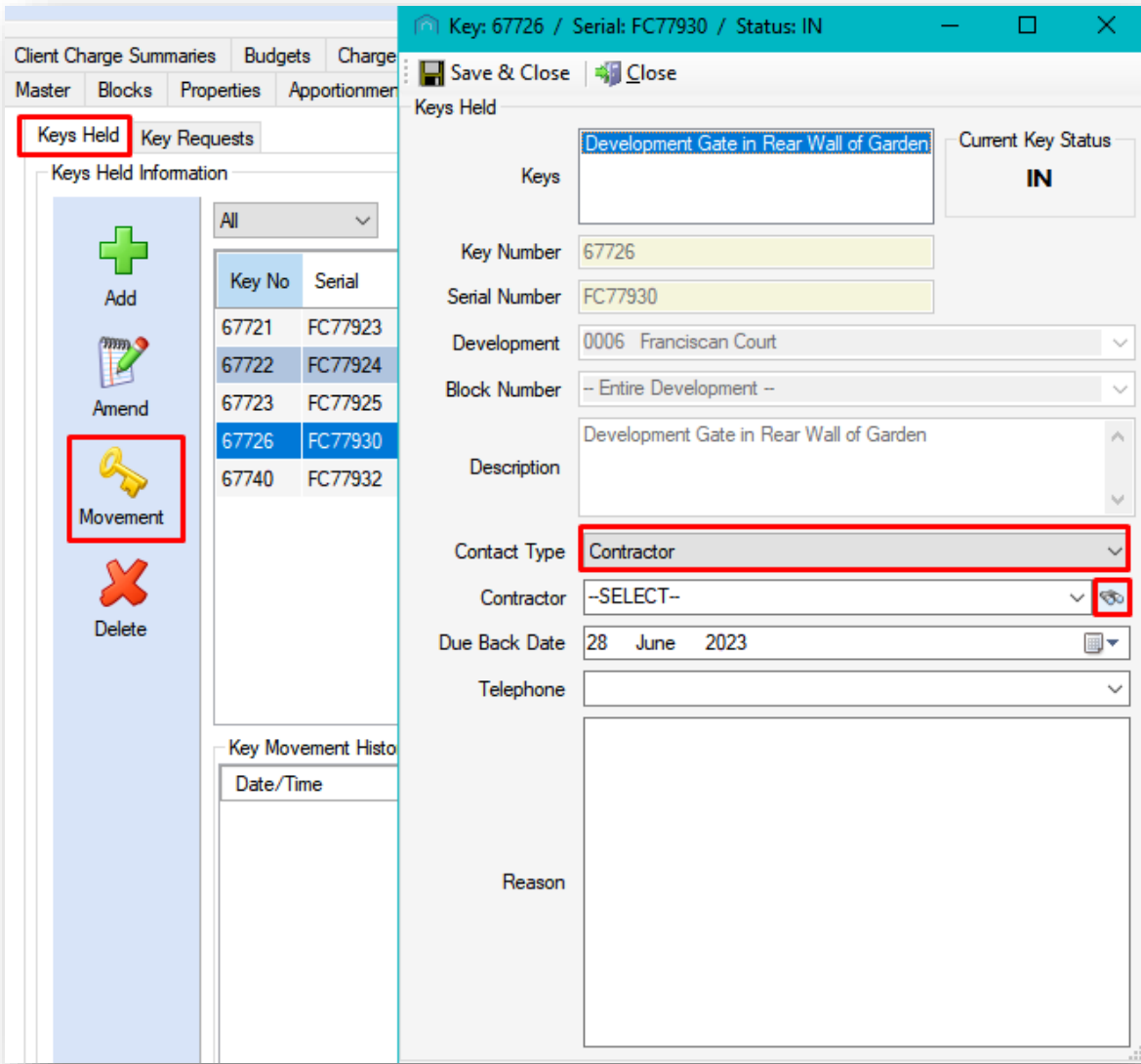
Clicking on the binoculars icon will launch the **PL Account Lookup** screen (as in other areas within CPL) to assist you in finding the individual contractor required more easily than using the drop-down list.
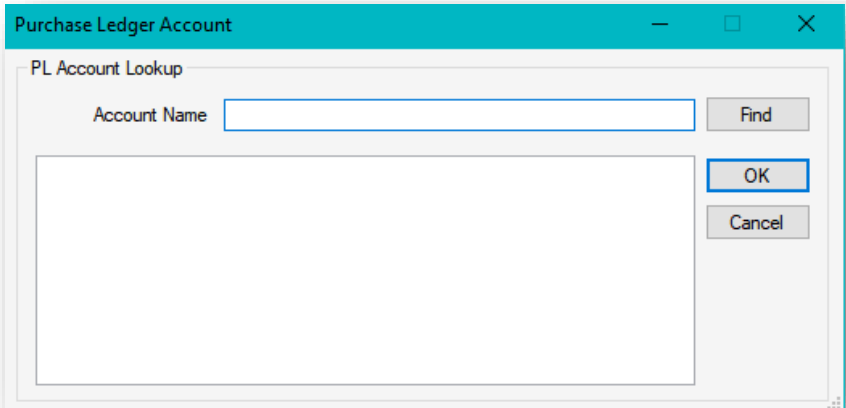
| 2.59.13 514 | Feature | Insurance - Receive Documents into Policy and Display in Client Accounts and on Client Web Portal | A new feature has been developed which will allow you to receive insurance documents into an insurance policy and also choose to have this saved to all individual properties covered by the policy and therefore into the **Letters Documents** tab of every relevant client. As part of this process the insurance document can be assigned a **Web Document Type** and can therefore appear on the client web portal.

For further information on how this new feature works, please refer to the **Insurance – Receive Documents into Policy and Display in Client Accounts** helpsheet which can be found in the CPL Knowledge Base by clicking here. |
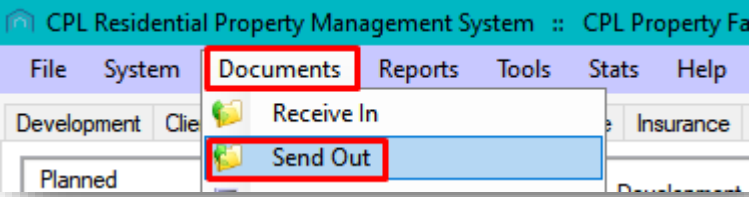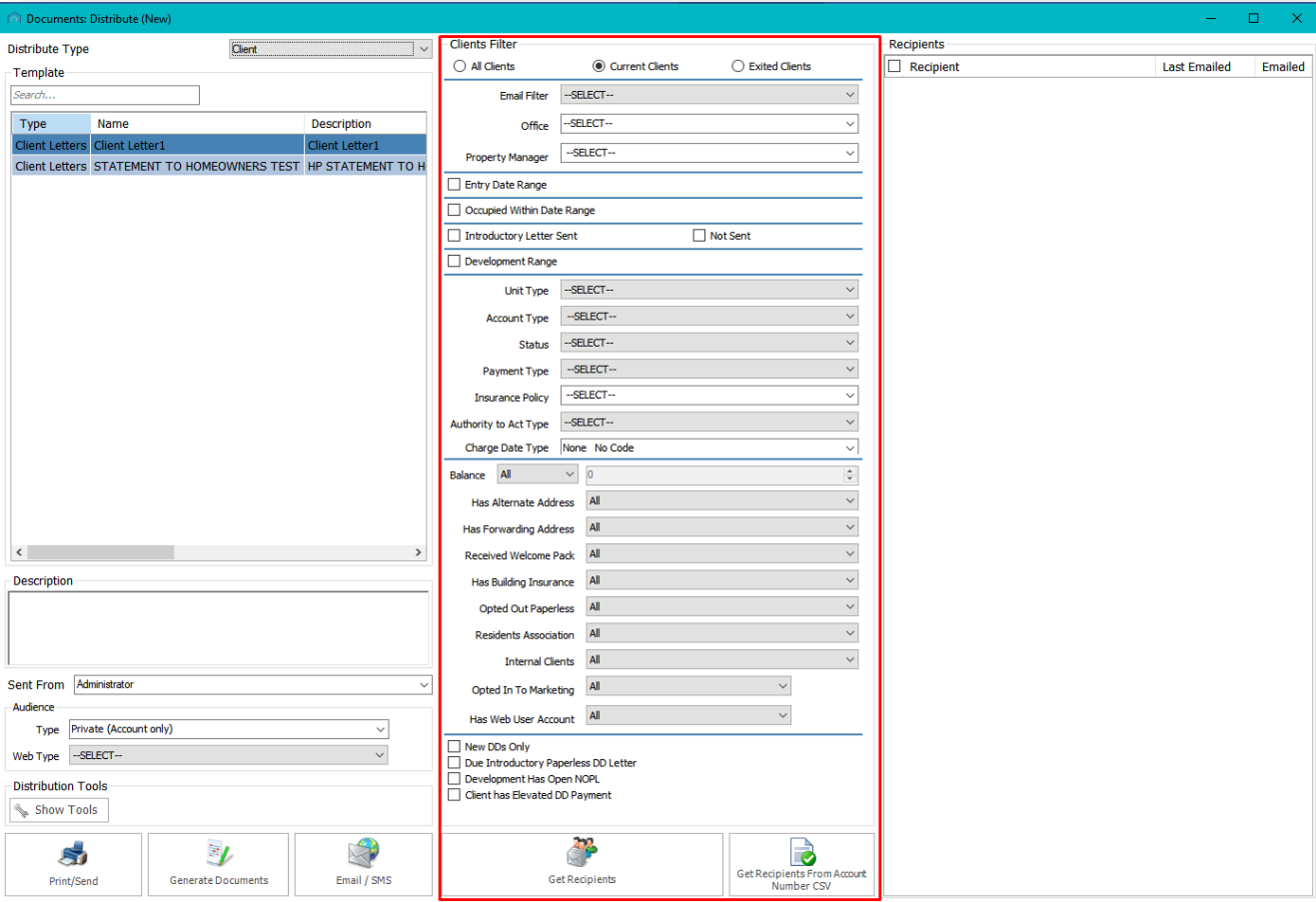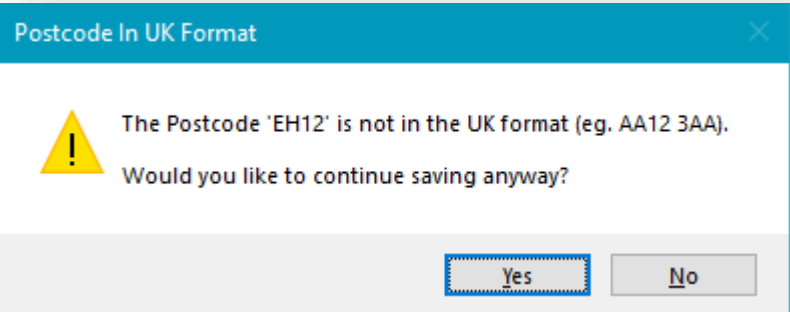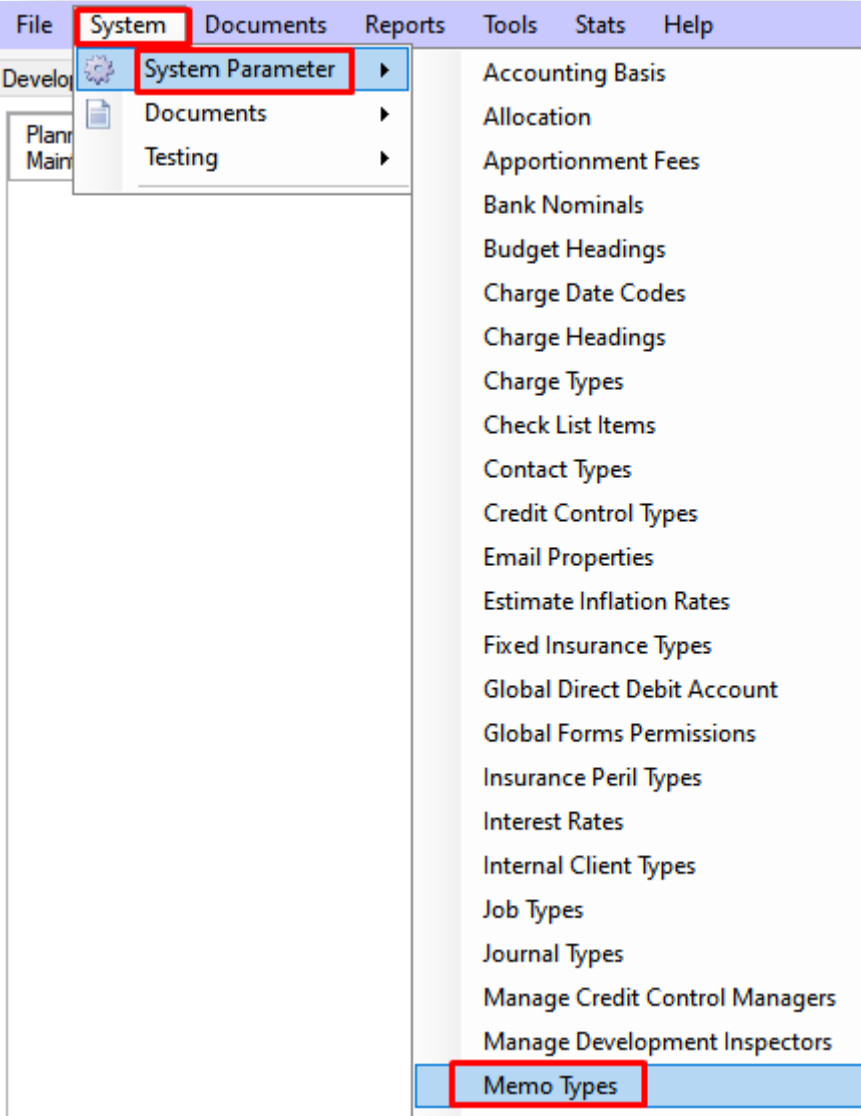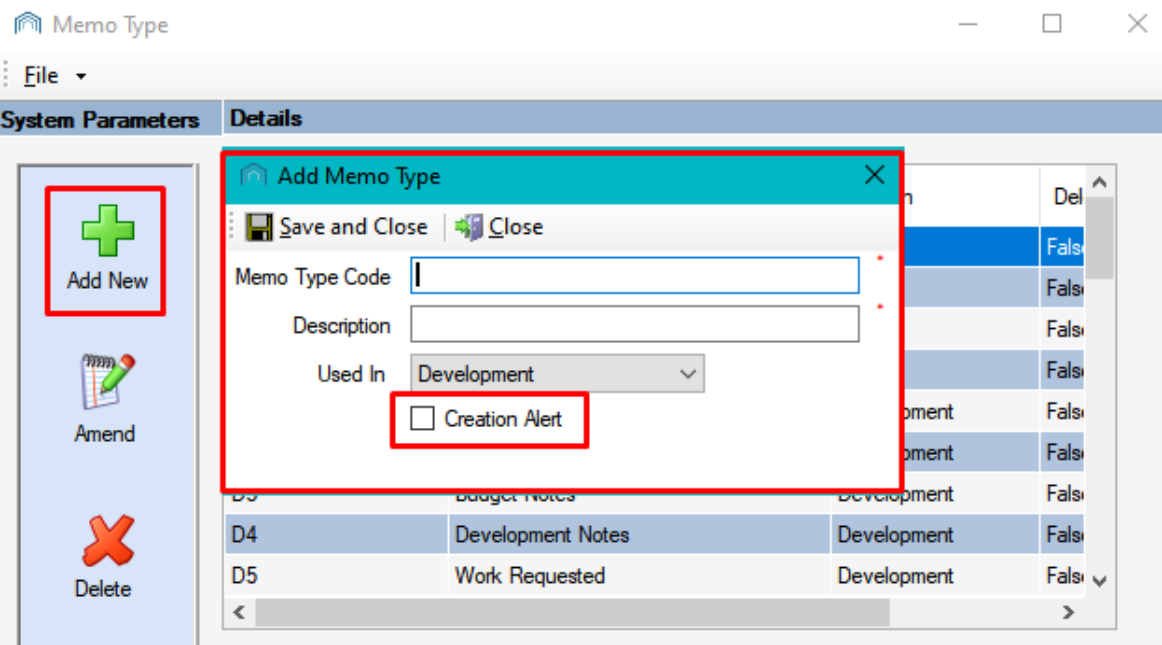|---|---|---|---|
| 2.59.13 352 | Feature | Add Document Type to Warranties and Maintenance Documents | A new feature has been developed which will allow you to assign a **Document Type** to a document you are receiving into the Warranties and Maintenance Documents area. This would allow you to create different document types related to warranties and maintenance contracts and be able to filter for documents of different types.

For further information on how this new feature works, please refer to the **Adding a Document Type to Warranties and Maintenance Document Uploads** helpsheet which can be found in the CPL Knowledge Base by clicking here.

Please consult the **Document Types Training Guide** available here if you would like some help with creating additional document types. |
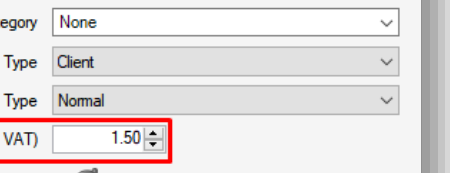
2.59.14 589	Fix	Document Distribute Screen Layout Size	We have maximised the main **Documents Distribute** screen to enable the middle filter area to be able to be viewed without scrolling. This will now launch in a window of the appropriate size meaning you don't have scroll to see all of the filter options.
2.59.16 Included in 2.59.14 release 840	Fix	Post Code Validation Not Working Correctly	In the 2.59.3 release, we added a post code alert feature to help you with your required data upload to the Scottish Factor Registry. This new feature meant that if you tried to save the development, property or client account with an incorrectly formatted post code you would see an alert informing you of this. This could be used as a prompt to edit the post code at the time and would mean that on processing the **Portfolio Export**, this should mean that the post codes in your portfolio have a better chance of already being in the correct format and this should hopefully save you the time it takes to edit the download later. An issue was identified recently where the alert was showing for valid post codes. This feature is now functioning correctly.
2.59.16 Included in 2.59.11 and 2.59.14 releases 853	Feature	System Setting to Disable Creation Alert Memos on Clients	In the 2.59.8 Release we developed a new feature which extended previous functionality related to client memos created. This feature meant that memos created at development level with a creation alert could pop up not just when the development was opened but also when any client account from that development was opened without these having to be created separately on every client account. To enable more control over this feature if it is not required, we have now created a system setting called **Enable Development Creation Memos**. If this is set to off, pop-up alerts will only appear when adding a new job from the development jobs window. *Please contact CPL Support if you would like to speak to us about configuring this system setting.* Memo Types can be created via the **System Parameters** menu.

2.59.16 Included in 2.59.14 release 1143	Fix	Proposed Work Document Distribute Slow	We have improved the performance when loading the **Document Distribute** screen to request payments in a proposed work.

| 2.59.16 Included in 2.59.11 and 2.59.14 releases 1182 | Feature | New Green Fee Mail Merge Field | A new Mail Merge field called **Green Fee** has been added to the **Client Details** view in CPL.

Green Fees are a more flexible option than Paper Fees in CPL to process fees to clients who have not provided you with an email address or this has not be set to be used for Documents and Invoices. Green Fee amounts can be added against unit types and picked up on the client account. If these have been added, they can be viewed on the Client Account tab in the Green Fee field.

Although populated by a default process when they are set up, the ex VAT amounts can be adjusted on a client by client basis by editing the amount in the Green Fee field.

Green Fees are processed using the **Process Green Fee** tab in the Client Global Actions menu and produce charges against the relevant client accounts.

We have created a Green Fee merge field on the Client Details view which would allow you to pick up amounts to be displayed in your communication with clients. |

Please contact CPL Support if you would like to speak to us about getting set up to use Green Fees.

2.59.16 Included in 2.59.14 release 1124	Fix	Proposed Work Share Clients	An issue has been discovered in a Proposed Work on the **Proposed Works Share** tab. When multiple clients are added individually (instead of using an Apportionment) the first client added keeps reverting to **Select**. This was continuing to happen, even when the proposed work was edited and the client added back in. This issue has now been resolved.

Please note, these release notes and the information contained within is subject to change until customer-wide roll out.