



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS  
& BLOCK MANAGERS

# DEVELOPMENT AREA CODES

## TRAINING GUIDE

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Version 1.4



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## PURPOSE

The purpose of this newly developed functionality is to allow users to create a custom list of designated areas for each Development for ease of management and maintenance across CPL. This allows you to break down the standard CPL items of Developments, Blocks and Properties even further and either reference areas within those items or even areas that don't fall under those items at all. For example, hallways, lifts and windows within a block; or a pond within the grounds that needs to be cleaned regularly.

Each Area Code can be contained within another Area Code to create a hierarchy for the purpose of ordering in a way that is easily navigable. For example, a Development Area Code for Floor 3 may contain multiple Area Codes for various hallways and stairwells within Floor 3.

The Area Codes can be set a default Apportionment or a specific client who is responsible for the maintenance of the area which the Area Code represents. This Area Code can then be used in the creation and management of Purchase Account invoice posting, Job creation, Proposed Work creation and Estimate Request creation. Setting a Development Area Code during these processes will automatically assign the correlating Development, Apportion, Block and Property information where applicable.

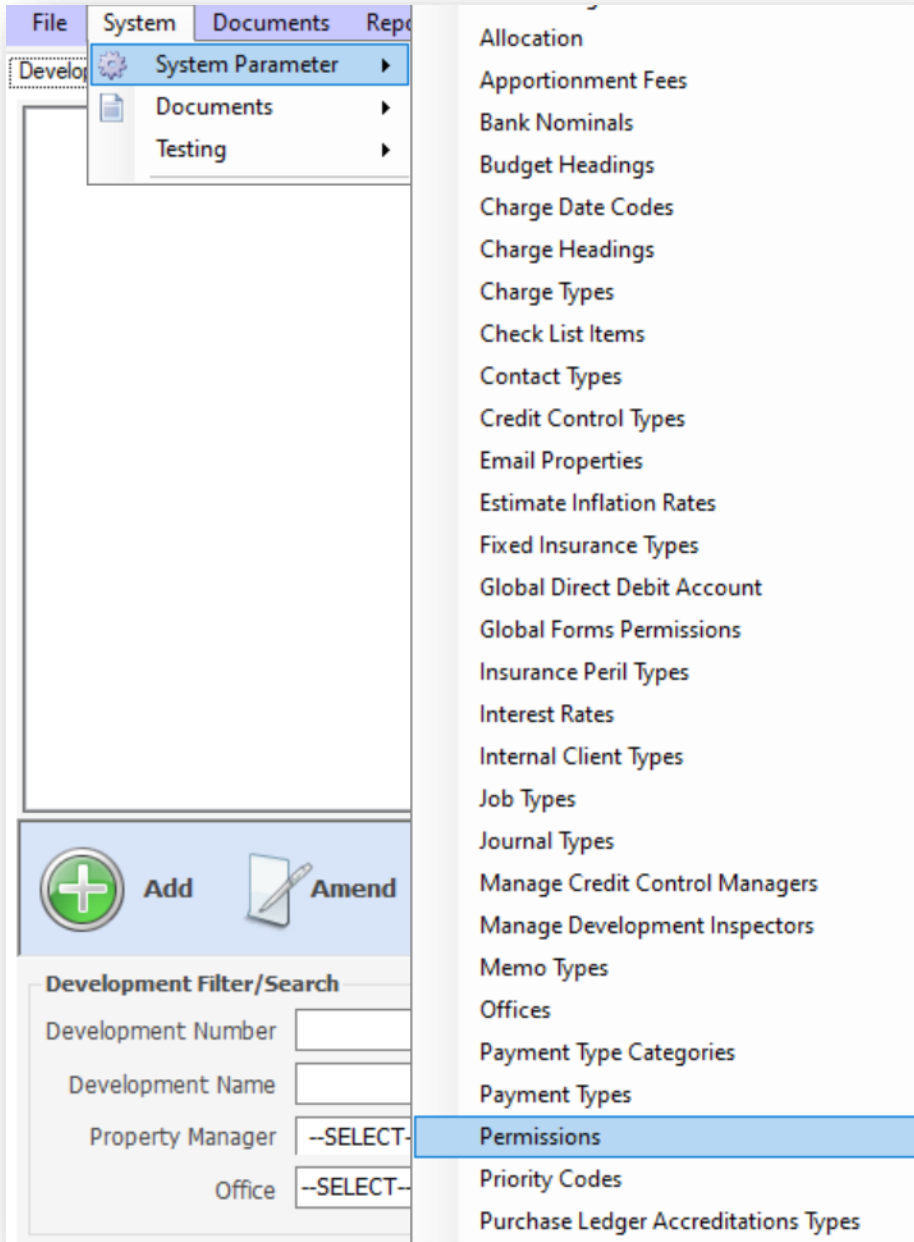
Documents can also be assigned to Area codes if, for example, you had a floorplan image which could be attached to the Area Code for that floor, or an inspection of a specific elevator which could then be attached to the Area Code for that specific elevator.

The main purpose of this feature is to streamline and keep track of maintenance and work orders for specific parts of a development and ensure that the correct Client(s) are invoiced appropriately for any work carried out.

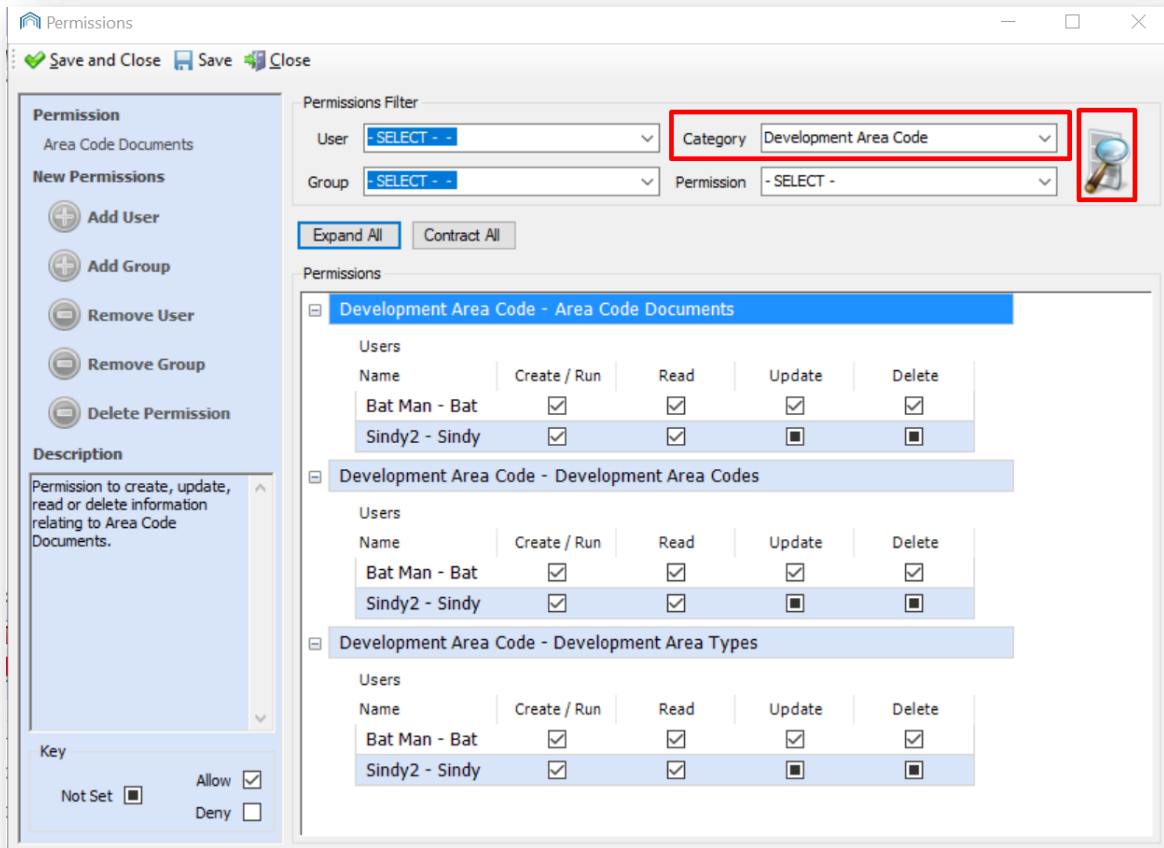
## PERMISSIONS

*This document assumes you have the correct Privileges for using these features. If you do not, please seek assistance from your local Super User who will be able to follow the process below:*

To set up or edit user permissions for Development Area Codes within CPL click on **System** in the top menu bar and then use the **System Parameter** drop-down menu to select **Permissions**:



This will open the **Permissions** window for the system:

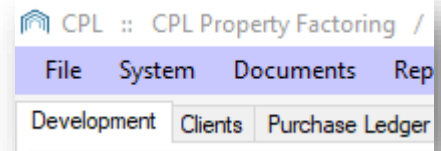


You can use the **Category** drop-down menu to select **Development Area Codes** and then click on the **Search Icon**.

This will filter the list to allow you to set up permissions for different users for Development Area Codes.

## ACCESSING DEVELOPMENT AREA CODES

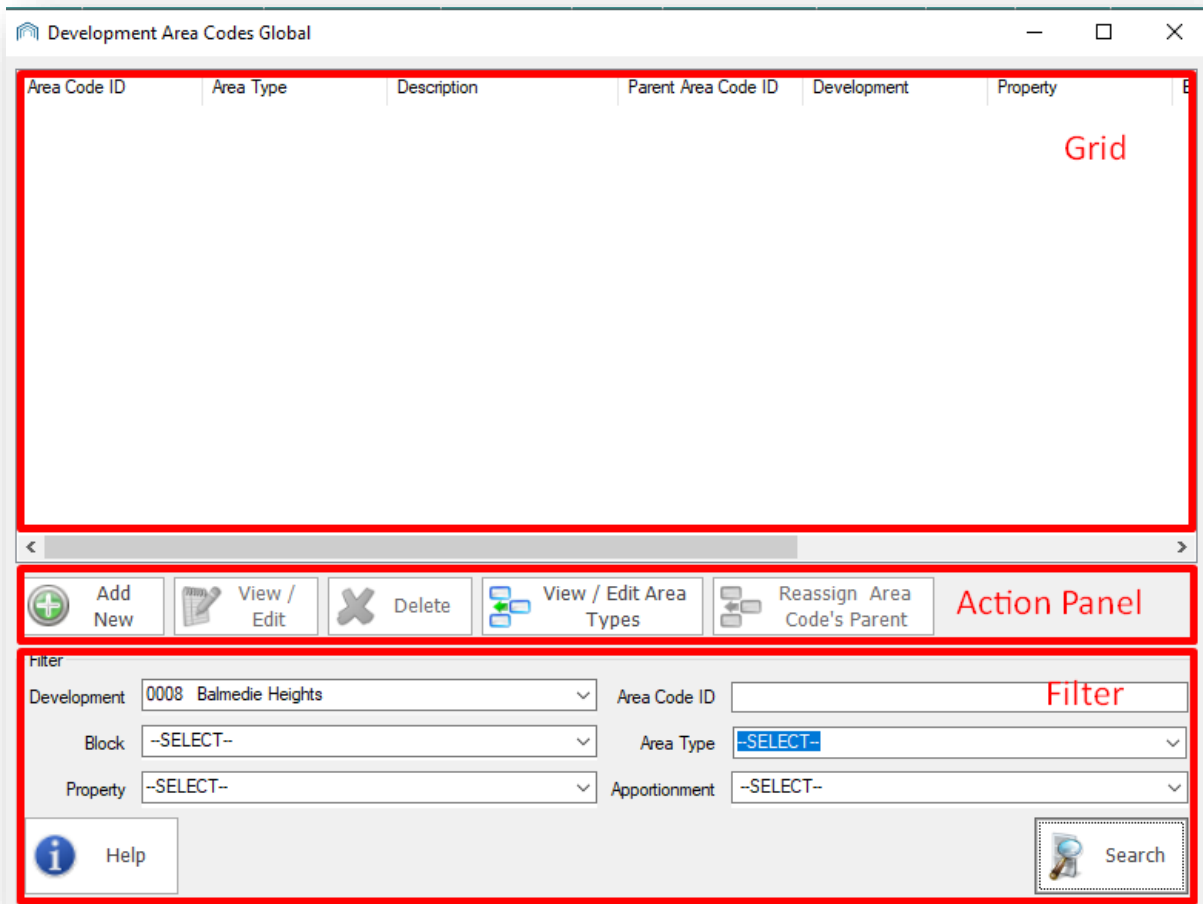
In order to get started with setting up Development Area Codes, select the **Development** tab in CPL.



In the blue highlighted **Action Panel** towards the bottom of the screen, click the **Development Area Codes** icon.



This will open a new **Development Area Codes Global** window:

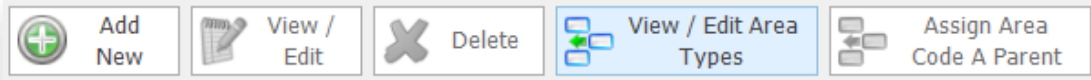


The window is made up of a data grid towards the top, an Action Panel beneath this and a filter search section towards the bottom. The Grid area will be empty when you first access Development Area Codes.

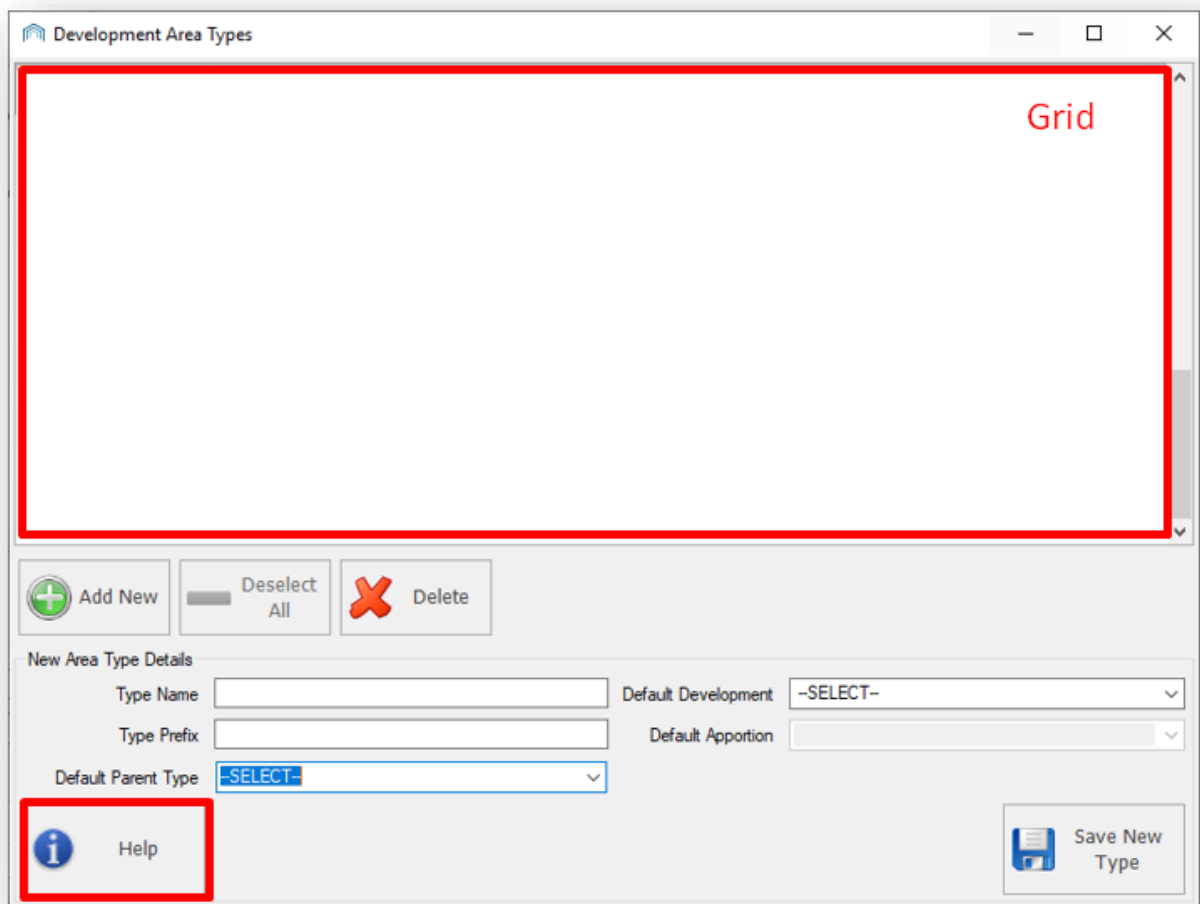
## SETTING UP DEVELOPMENT AREA CODE TYPES

In order to set up Development Area Codes to use in CPL you must first create Development Area Types.

In the Development Area Codes Global Window, select the icon **View / Edit Area Types**.



This will open the **Development Area Types** window:



This window is comprised of a grid area at the top which will eventually display all of the Development Area Types in a sortable list. The lower part of the screen is not a filter search but is used to Create and Update Area Types.

*Please note there is a **Help** button leading to a PDF document with additional information on using this screen.*

## CREATING A NEW AREA CODE TYPE

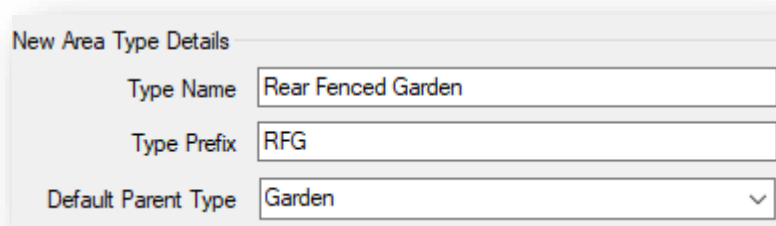
To create your first New Area Type simply enter information into the fields.

In the **Type Name** field add the name of the Type you would like to create. In this example we have chosen 'Rear Fenced Garden'.

In the **Type Prefix** field, we will add a relevant short code. In this example we will add 'RFG'.

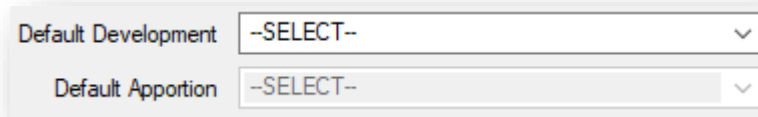
You can add a **Default Parent Type** but it is not always necessary. It will, however allow you to create a sensible structure to work inside. There will be no Default Parent Types to select unless you have previously created a Type.

For this example, our 'Rear Fenced Garden' is located in the 'Garden' (which is an Area Code Type we have previously created) and so we will select this from the drop-down list:



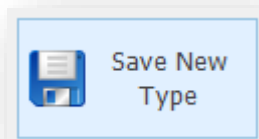
New Area Type Details	
Type Name	Rear Fenced Garden
Type Prefix	RFG
Default Parent Type	Garden

In the right-hand column you have fields for **Default Development** and **Default Apportionment** which you may wish to set. Both of these fields are optional, filling these in ties your newly created Development Area Type to a specific Development and Apportionment. Not selecting these means they can be used across multiple Developments/ Apportionments.

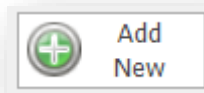


Default Development	--SELECT--
Default Apportionment	--SELECT--

In the bottom right-hand corner is the **Save New Type** icon. Click this to save your new Area Type once you have completed all appropriate fields.



To create further Area Types, click on **Add New** to clear the form details and then add the appropriate information.



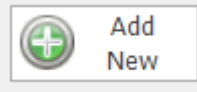
Once you have set up all the Development Area Types you require you can now close this window and return to the main Development Area Codes Global window.



You are now ready to arrange your Development Area Codes of different Types into a hierarchy.

### CREATING A NEW DEVELOPMENT AREA CODE

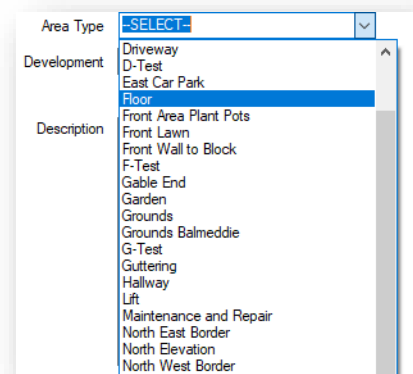
Click the **Add New** icon to begin this process.



This opens the Development Area Code window. This screen contains the controls required to create or update a Development Area Code.

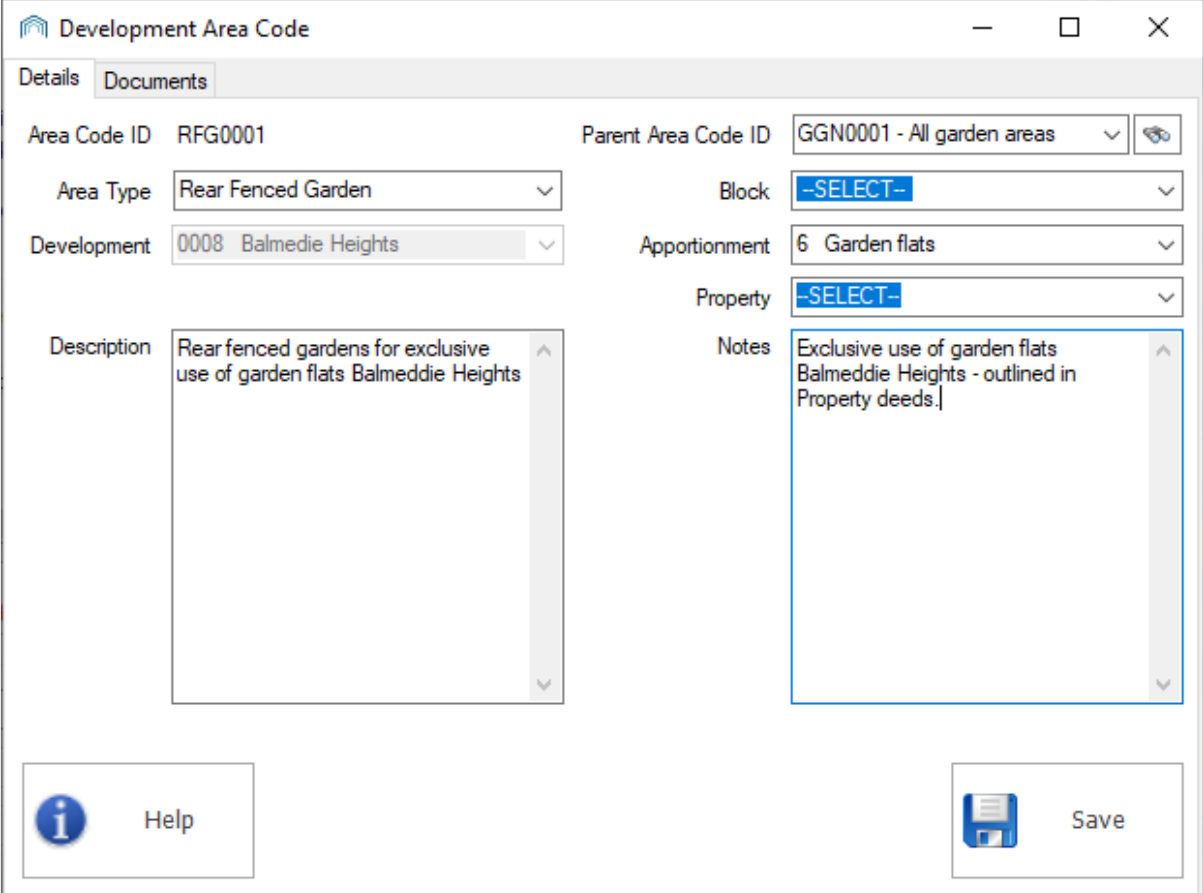
*Please note there is a **Help** button leading to a PDF document with additional information on using this screen.*

Click on the drop-down arrow on the **Area Type** field to choose from the Area Types you have already created:



When you select a **Development**, the **Block**, **Apportionment** and **Property** fields will become available.

You can add a Description of the Area Code which will be displayed as part of the Area Code's name. You also have the option to write notes:



The screenshot shows a software window titled "Development Area Code" with two tabs: "Details" and "Documents". The "Details" tab is active and contains the following fields:

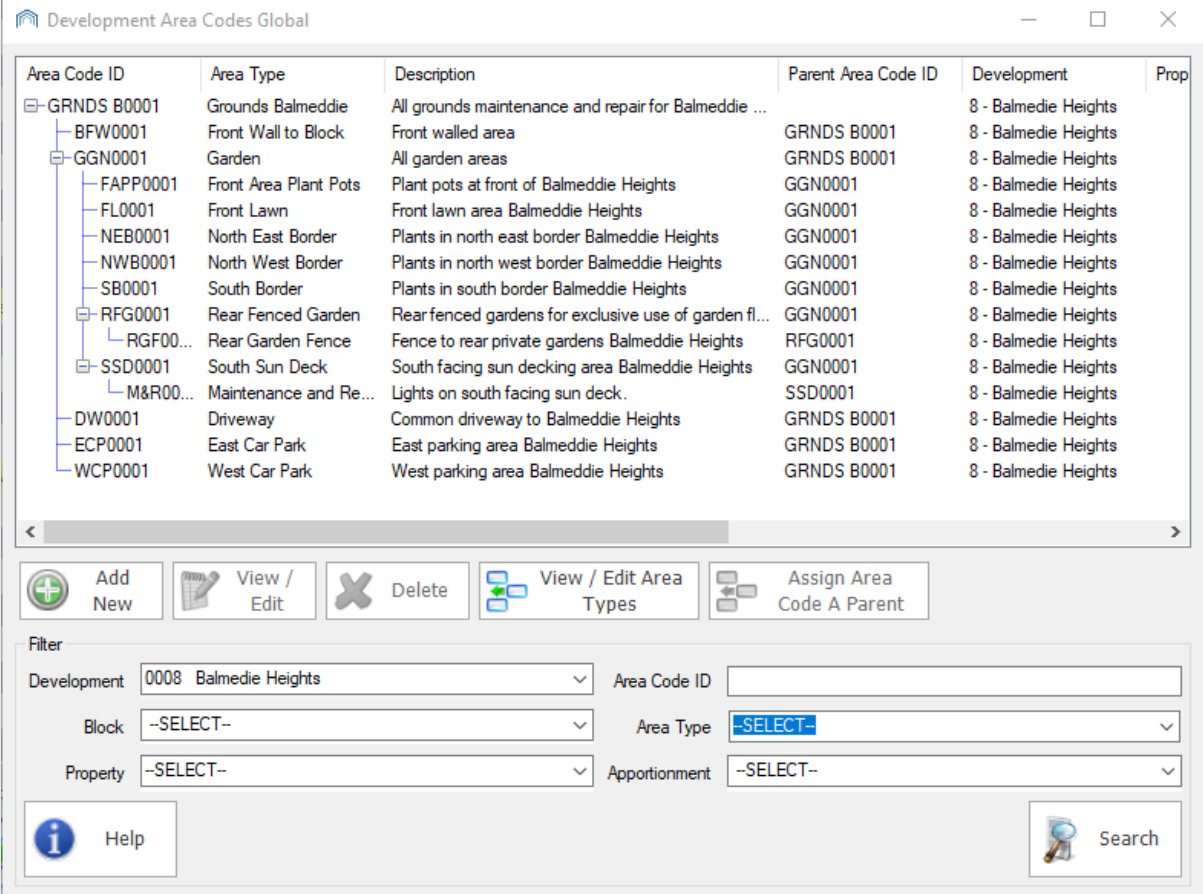
- Area Code ID:** RFG0001
- Parent Area Code ID:** GGN0001 - All garden areas (with a refresh icon)
- Area Type:** Rear Fenced Garden (dropdown menu)
- Block:** --SELECT-- (dropdown menu)
- Development:** 0008 Balmedie Heights (dropdown menu)
- Apportionment:** 6 Garden flats (dropdown menu)
- Property:** --SELECT-- (dropdown menu)
- Description:** Rear fenced gardens for exclusive use of garden flats Balmeddie Heights (text area)
- Notes:** Exclusive use of garden flats Balmeddie Heights - outlined in Property deeds. (text area)

At the bottom of the window, there are two buttons: "Help" (with an information icon) and "Save" (with a floppy disk icon).

*Please note that, if required, you can set up additional Apportionments for Developments in the Apportionments tab inside Developments.*

## DEVELOPMENT AREA CODES TREE STRUCTURE

You can now continue to create Development Area Codes and build these into a tree structure in terms of their relationships to each other. In the example below a 'tree structure' has been created to help with management, maintenance and billing in one Development. You can see where the parent Area Codes have been set. For example, there is a Parent Area Code set for all garden areas and beneath that there are Area Codes set for specific areas within the gardens which could help with the maintenance of these separate areas:



Area Code ID	Area Type	Description	Parent Area Code ID	Development	Prop
GRNDS B0001	Grounds Balmeddie	All grounds maintenance and repair for Balmeddie ...		8 - Balmeddie Heights	
BFW0001	Front Wall to Block	Front walled area	GRNDS B0001	8 - Balmeddie Heights	
GGN0001	Garden	All garden areas	GRNDS B0001	8 - Balmeddie Heights	
FAPP0001	Front Area Plant Pots	Plant pots at front of Balmeddie Heights	GGN0001	8 - Balmeddie Heights	
FL0001	Front Lawn	Front lawn area Balmeddie Heights	GGN0001	8 - Balmeddie Heights	
NEB0001	North East Border	Plants in north east border Balmeddie Heights	GGN0001	8 - Balmeddie Heights	
NWB0001	North West Border	Plants in north west border Balmeddie Heights	GGN0001	8 - Balmeddie Heights	
SB0001	South Border	Plants in south border Balmeddie Heights	GGN0001	8 - Balmeddie Heights	
RFG0001	Rear Fenced Garden	Rear fenced gardens for exclusive use of garden fl...	GGN0001	8 - Balmeddie Heights	
RGF0001	Rear Garden Fence	Fence to rear private gardens Balmeddie Heights	RFG0001	8 - Balmeddie Heights	
SSD0001	South Sun Deck	South facing sun decking area Balmeddie Heights	GGN0001	8 - Balmeddie Heights	
M&R0001	Maintenance and Re...	Lights on south facing sun deck.	SSD0001	8 - Balmeddie Heights	
DW0001	Driveway	Common driveway to Balmeddie Heights	GRNDS B0001	8 - Balmeddie Heights	
ECP0001	East Car Park	East parking area Balmeddie Heights	GRNDS B0001	8 - Balmeddie Heights	
WCP0001	West Car Park	West parking area Balmeddie Heights	GRNDS B0001	8 - Balmeddie Heights	

Control Panel:

- Add New
- View / Edit
- Delete
- View / Edit Area Types
- Assign Area Code A Parent

Filter:

- Development: 0008 Balmeddie Heights
- Block: --SELECT--
- Property: --SELECT--
- Area Code ID: [ ]
- Area Type: --SELECT--
- Apportionment: --SELECT--

Buttons: Help, Search

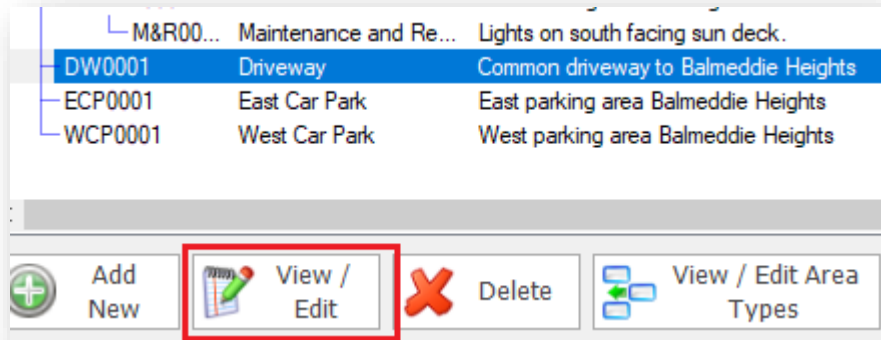
The Development Area Codes Tree Structure can allow you to be very specific about where maintenance is required. Building a useful 'tree structure' is a bit like creating a map of the Development.

Another example could be an Area Code for the third floor of a Block within a Development. Floor 3 could have Area Codes for, Hall A, Hall B and Hall C. Within Hall A, we could have Window X and Window Y. Building up this 'map' of the Development using the Area Codes allows us to be specific and raise a Job with a Contractor saying that Window Y, in Hall A on Floor 3 needs the closing mechanism checked, that's F3HAWY.

To continue to add to the tree, select the part of the tree you wish to add a branch to and click **Add New**, wherever you select the branch will be inserted with the correct Development Area Code as a 'parent'.

## EDITING DEVELOPMENT AREA CODES

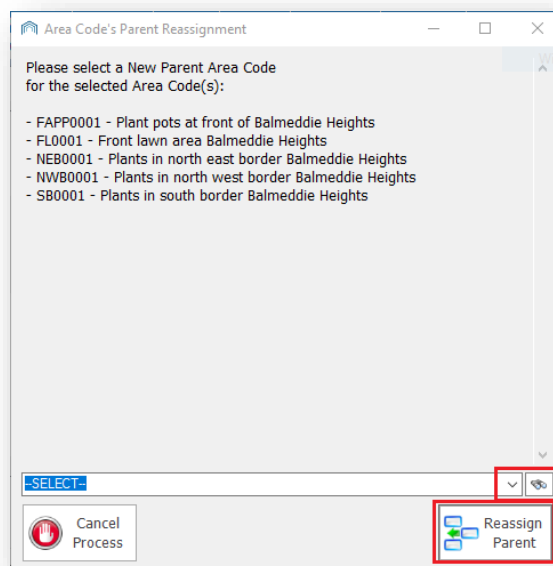
In order to make any changes to a Development Area Code within the tree you can click to highlight it and then click on the **View/Edit** icon.



You can also reassign an individual Development Area Code's 'Parent' within the tree. Click to highlight one (or hold down the **Ctrl** key to select multiple Area Codes) and then click on the **Reassign Area Code's Parent** icon in the Action Panel.



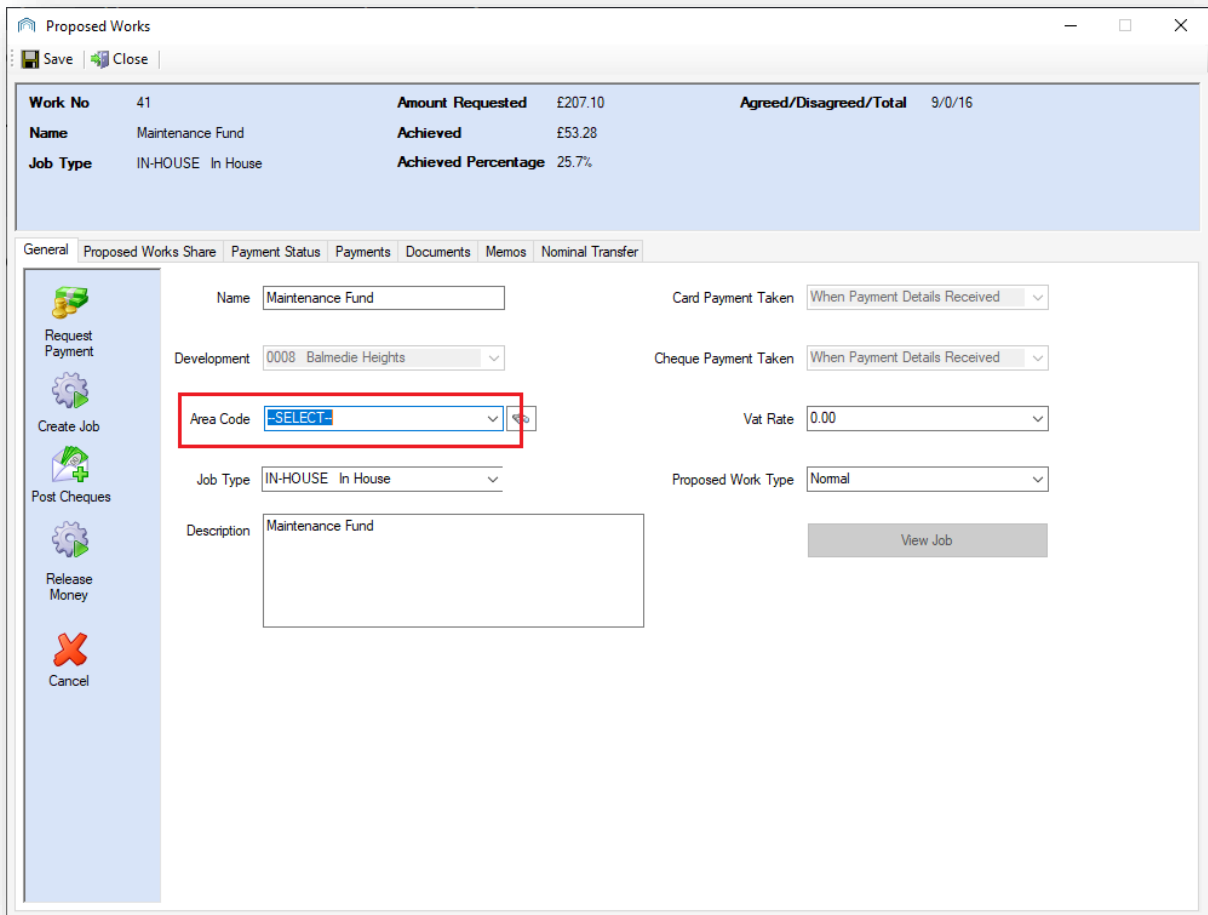
A new screen will open with the name of the Area Code and an option to select a new Parent Area Code. You can click on the drop-down arrow to see a list of all Area Codes or use the search option to search for a specific Area Code. When you have chosen a new Parent Area Code click on the **Reassign Parent** button:



## MAKING USE OF DEVELOPMENT AREA CODES ELSEWHERE IN CPL

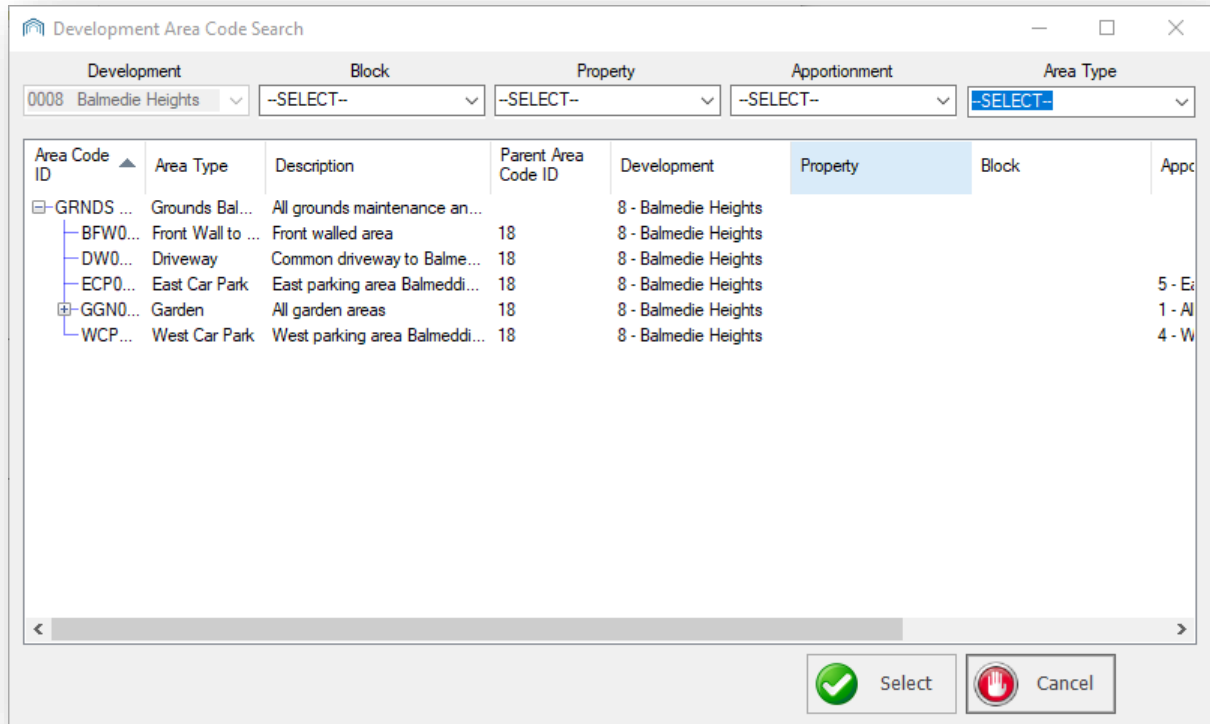
Once you have created Development Area Codes you can use them in various modules throughout CPL. You will be able to make use of them in the Jobs; Proposed Works; Post Proposed Invoice; Proposed Invoice; Accept Proposed Invoice; Purchase Ledger Transactions and the Estimate Request Wizard. You will be able to use them anywhere you would normally need to select a development and Client Account Numbers.

The example below illustrates the General screen in Proposed Works. You will note that there is now a field providing an option to select an Area Code. You can click on the **drop-down arrow** to select an Area Code from a list of all Area Codes.



Alternatively click on the small **search** icon. This will open the Development Area Code Search box which will allow you to see the whole tree structure you have created and you can select from within this as appropriate:





## CPL KNOWLEDGE BASE

This training guide forms part of CPL's Knowledge Base which is available for all CPL users at <https://contact.cplsoftware.com/portal/home>

The CPL Knowledge Base will be continually updated with additional guides and information. If you have any questions or suggestions for further guides we'd be happy to hear from you. You can contact CPL Support by emailing us at [support@cplsoftware.com](mailto:support@cplsoftware.com) or through our portal at <https://contact.cplsoftware.com/portal/home> or calling us on 0345 646 0240 (option 1).