CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

DOCUMENT TEMPLATES

TRAINING GUIDE

DEC 2020

Version 1.0

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INTRODUCTION

Creating document templates can save you time when you are contacting your clients to supply them with important information. You can create various generic templates that can be automatically customised for multiple recipients using the Mail Merge facility within CPL.

There are two separate Mail Merge Training Guides which cover inserting these fields into your documents and these are available on the CPL Knowledge Base. This guide will deal exclusively with creating and saving your document template.

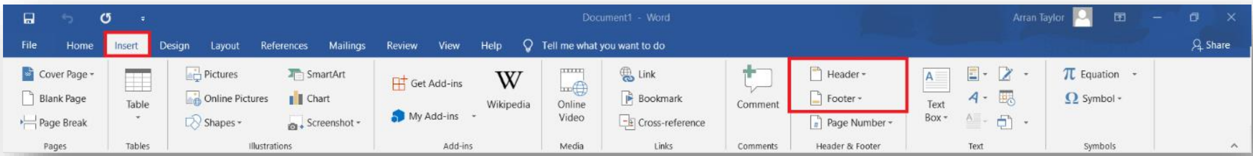
Please note that this Training Guide has been written based on the Microsoft Word 2019 version and the menu items may look slightly different on other versions of Word.

SETTING UP HEADERS AND FOOTERS IN YOUR MAIL MERGE TEMPLATE

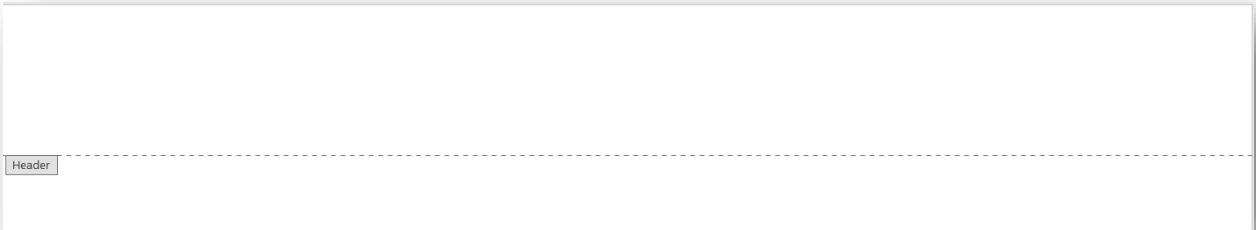
Using headers and footers in your document template will allow you to brand your document and identify it as coming from your company. You can set this up once and save your resulting document as a blank template which will make the creation of any future templates much easier.

Open a blank Word document to get started.

In your document click the **Insert** tab in the main menu ribbon and select **Header** or **Footer**.

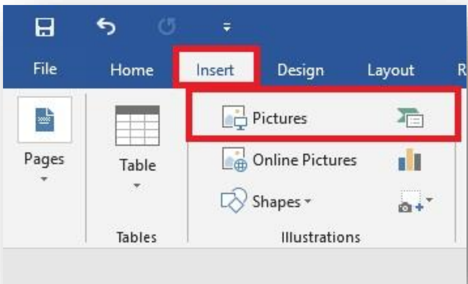


Word will now display a dotted line across the area selected and allow you to edit this area.



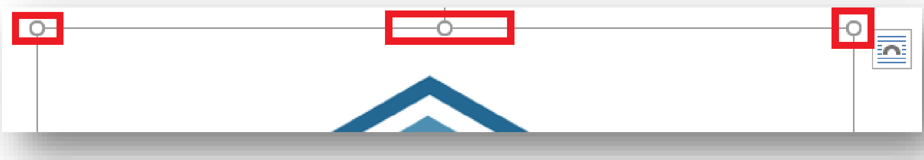
Add any header or footer text and/ or images appropriate for your document.

Drag and drop your image or click on the **Insert** menu and choose the **Pictures** option:

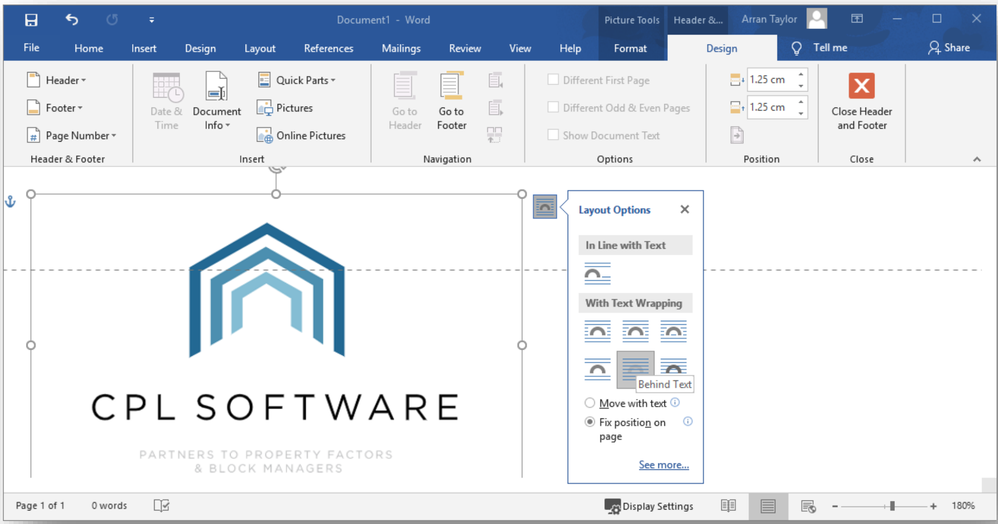


Browse for the image you wish to use and select it to add it to your word document.

Once you have added a header/ footer image you can reposition it by clicking the image and dragging it into place. If your image is too large, you can use the sizing handles around the borders of your image to change its size on the page.



Clicking the image to highlight it will also give you the option to use the **Layout Options** menu to position your image:



You may want to consider using the **Behind Text** option to prevent your header from overlapping any text in your document. You may also want to select the **Fix position on page** option for your image.

Once you have positioned any header image and text you can repeat the process for the footer. Head to the bottom of the page in your document and double-click within this area to enable you to edit the footer in the same manner as your header.

Once the header and footer of your document are set up as per your requirements, you can then save the document.

If this is the generic header/footer document you intend to use to create other templates from then make sure the title reflects this to assist other members of your company to make use of it. You could save the document as **Mail Merge Blank Template Header and Footer** and place it in your document folder on the server to enable everyone to access this.

You could also add some generic text to your document. This could be added to each time you distribute a document using this template.

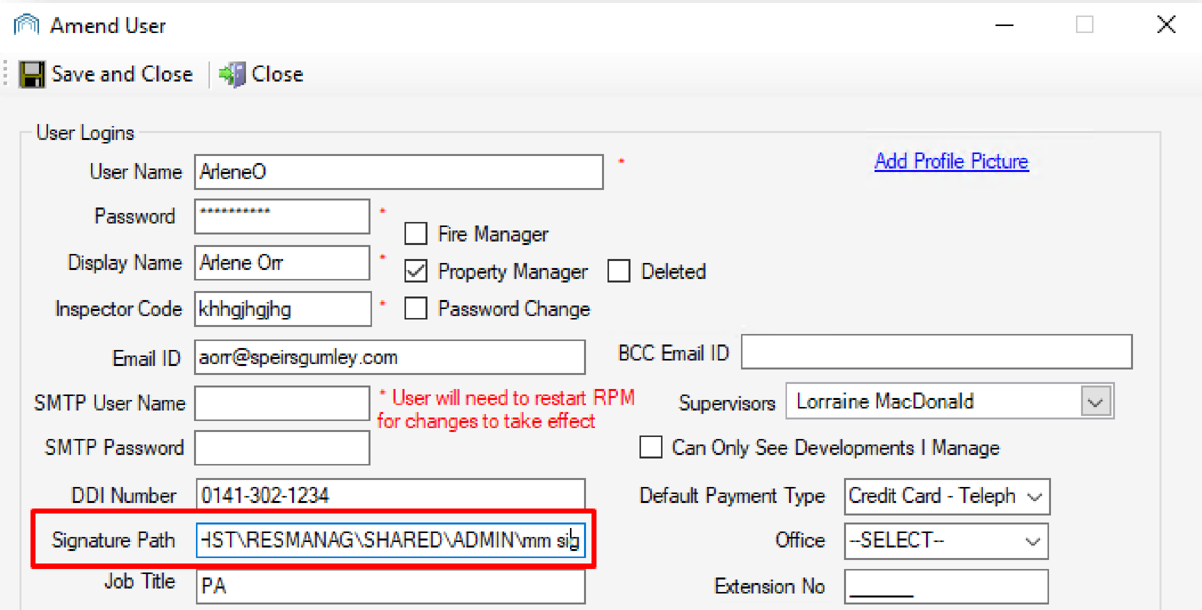
CREATING A MAIL MERGE TEMPLATE

Please consult the Mail Merge Training Guides to find out about adding mail merge fields into your document. These fields will tell Word where to go to collect the information from CPL appropriate for each individual recipient.

ADDING A SIGNATURE

You can add a mail merge field to your document which would allow you to display an image of a signature if you have one available.

You need to save the image file to your server and then make sure that you copy the file address path for the image to be entered into the **Signature Path** field in your **User Login** screen.



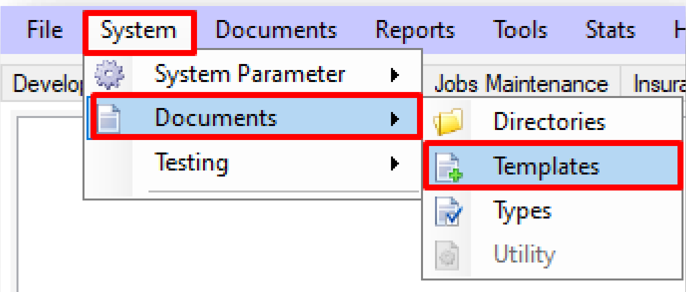
In the document where you want the signature to appear, you would add the mail merge field called **SignatureFilePath**.

Please consult the Mail Merge Training Guide on the CPL Knowledge Base for more information on how to insert merge fields into your document.

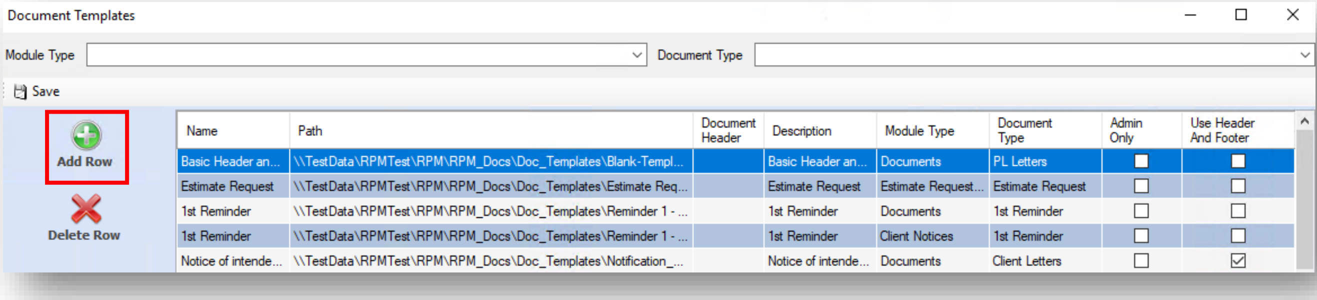
ADDING YOUR DOCUMENT TO THE TEMPLATES DIRECTORY

The next step is to add your document to the directory in CPL to allow it to become a document template. This will mean it will be available to all CPL users in your company to use it for communications in the **Documents Distribute** screen.

To add your document to the templates directory in CPL, select the **System** menu from the top of the main window and then select **Documents** and then **Templates**.

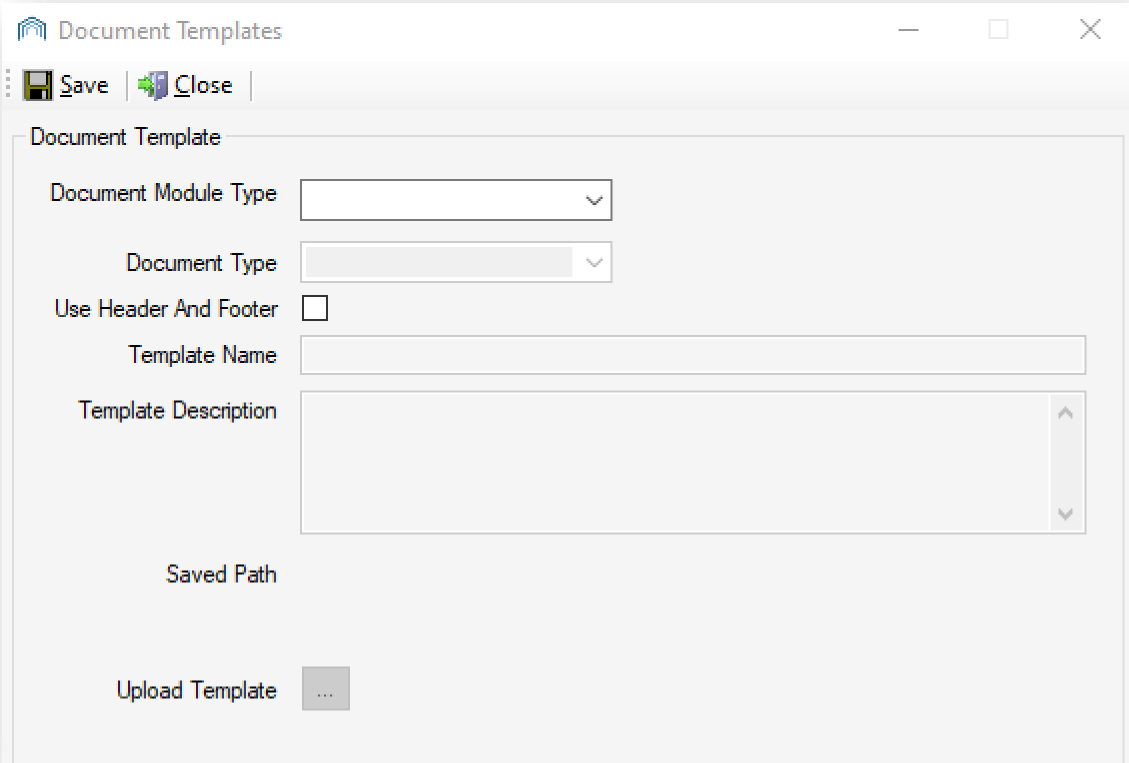


This will open the **Document Templates** screen.



In this window you will see a list of all the **Document Templates** which have been uploaded for your company.

In order to add your **Document**, select **Add Row** from the action panel on the left of the window, this will open the **Document Templates** window.



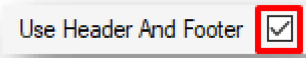
Select the appropriate **Document Module Type** from the drop-down menu that you wish this template to relate to.

If you would like additional information on setting up document types then please consult the Document Types Training Guide in the CPL Knowledge Base.

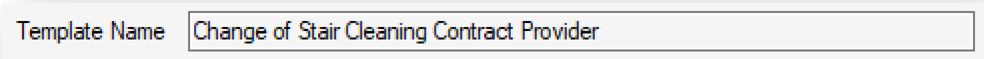
Following this, select the **Document Type** which is a subcategory of the **Document Module Type**.

This will help you to find the document again when you come to use the Document Distribute screen to send out your document.

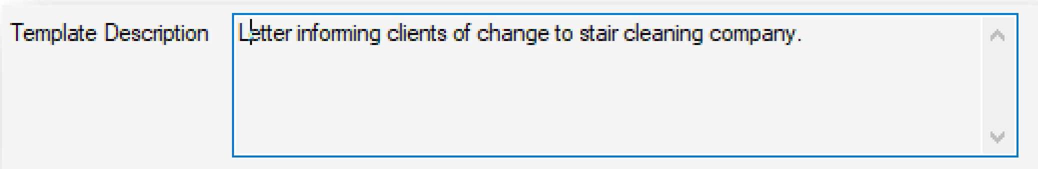
Select if the document has been set up to allow for printing onto paper which has a pre-printed header and footer. This will mean the document will leave space in the header and footer sections of the page to allow for this.



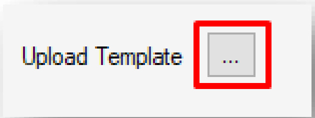
Type a name for your document in the **Template Name** field.



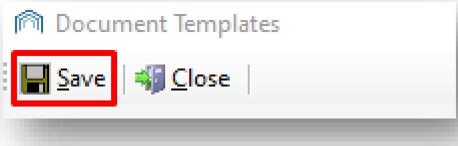
Type a description into the **Template Description** field to make your document easier to find.



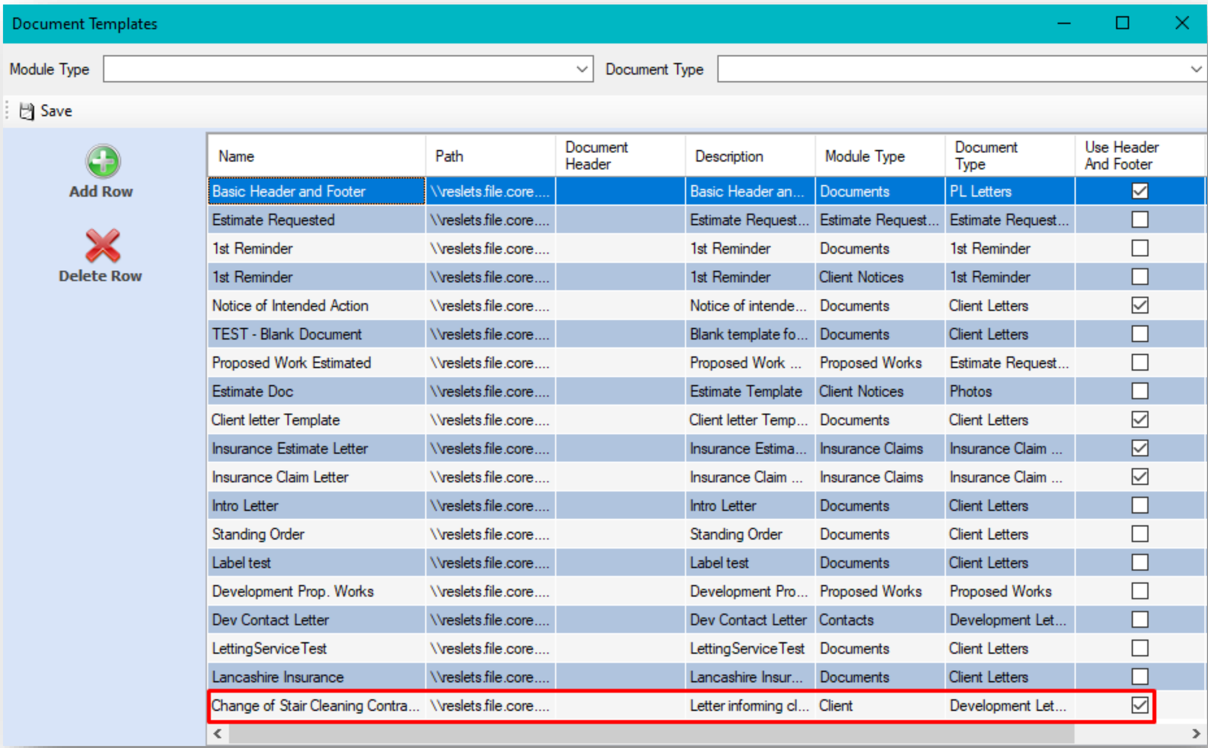
You can now click on the icon next to **Upload Template** in order to browse for and select the document you created.



Once you have done this, you can click on **Save** in top-left of the Document Templates screen.



Your document has now been added as a template in CPL.



Name	Path	Document Header	Description	Module Type	Document Type	Use Header And Footer
Basic Header and Footer	\\reslets.file.core....		Basic Header an...	Documents	PL Letters	☑
Estimate Requested	\\reslets.file.core....		Estimate Request...	Estimate Request...	Estimate Request...	☐
1st Reminder	\\reslets.file.core....		1st Reminder	Documents	1st Reminder	☐
1st Reminder	\\reslets.file.core....		1st Reminder	Client Notices	1st Reminder	☐
Notice of Intended Action	\\reslets.file.core....		Notice of intende...	Documents	Client Letters	☑
TEST - Blank Document	\\reslets.file.core....		Blank template fo...	Documents	Client Letters	☐
Proposed Work Estimated	\\reslets.file.core....		Proposed Work ...	Proposed Works	Estimate Request...	☐
Estimate Doc	\\reslets.file.core....		Estimate Template	Client Notices	Photos	☐
Client letter Template	\\reslets.file.core....		Client letter Temp...	Documents	Client Letters	☑
Insurance Estimate Letter	\\reslets.file.core....		Insurance Estima...	Insurance Claims	Insurance Claim ...	☑
Insurance Claim Letter	\\reslets.file.core....		Insurance Claim ...	Insurance Claims	Insurance Claim ...	☑
Intro Letter	\\reslets.file.core....		Intro Letter	Documents	Client Letters	☐
Standing Order	\\reslets.file.core....		Standing Order	Documents	Client Letters	☐
Label test	\\reslets.file.core....		Label test	Documents	Client Letters	☐
Development Prop. Works	\\reslets.file.core....		Development Pro...	Proposed Works	Proposed Works	☐
Dev Contact Letter	\\reslets.file.core....		Dev Contact Letter	Contacts	Development Let...	☐
LettingServiceTest	\\reslets.file.core....		LettingServiceTest	Documents	Client Letters	☐
Lancashire Insurance	\\reslets.file.core....		Lancashire Insur...	Documents	Client Letters	☐
Change of Stair Cleaning Contra...	\\reslets.file.core....		Letter informing cl...	Client	Development Let...	☑

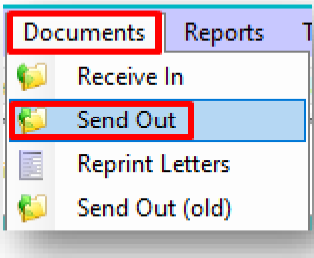
You can now click to close the **Document Templates** window.

DISTRIBUTING YOUR DOCUMENT TEMPLATE

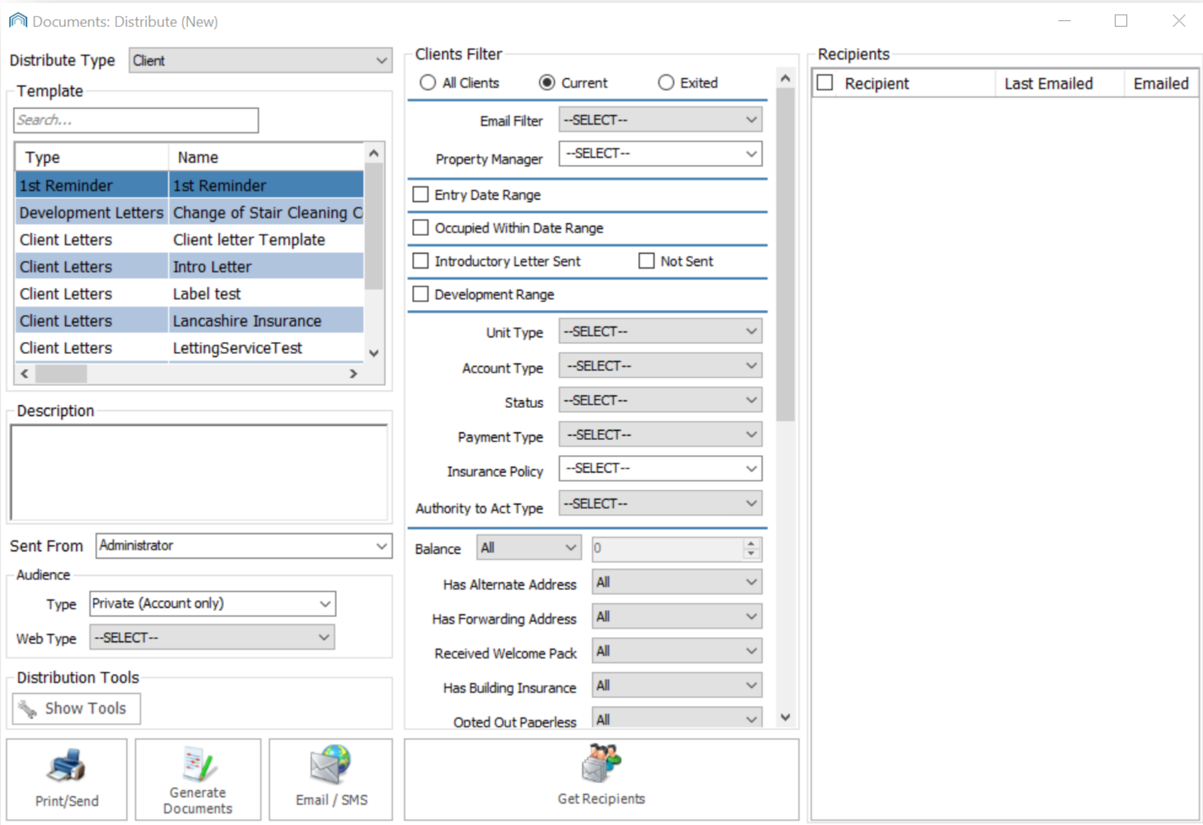
Your document is now ready for everyone in your company to use.

There are many areas within CPL for you to choose to send out your document from. You could be doing this from within the Docments/Letters tabs from within a development, an individual client, or a purchase ledger account. In this example we will send it out from the **Documents** area in the main screen.

Click on **Documents** in the top menu bar of CPL and choose **Send Out**.

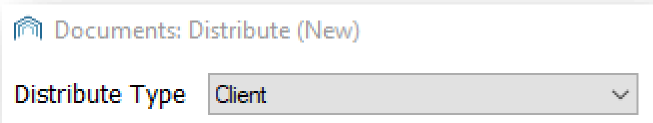


This will open the **Documents: Distribute (New)** window.



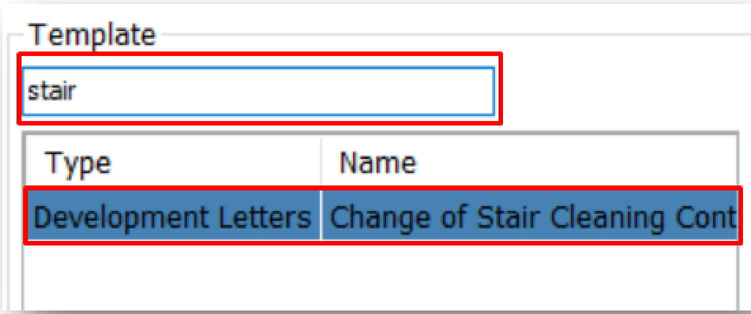
LOCATING YOUR TEMPLATE

Select the appropriate **Distribute Type** for your document from the drop-down menu. This should match the **Document Type** you selected when you were saving your document as a template.



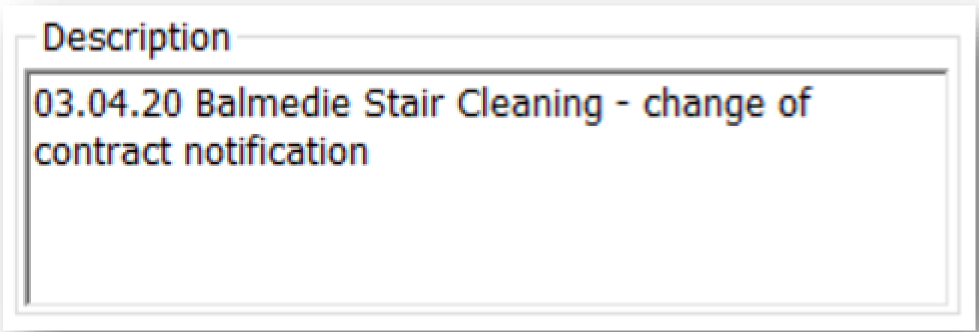
If you can't immediately see the name of your template listed in the box, you may want to enter part of the **Template Name** you used when saving your template into the **Template Search** field to make it easier to find.

In this example the template was saved as **Change of Stair Cleaning Contract** and **stair** has been entered into the search box.

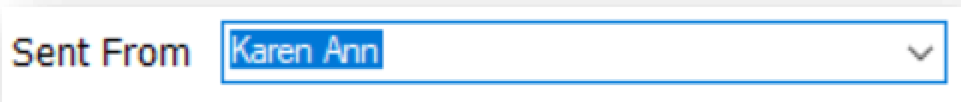


Click on the appropriate template to select it.

Enter a suitable description in the **Description** field.



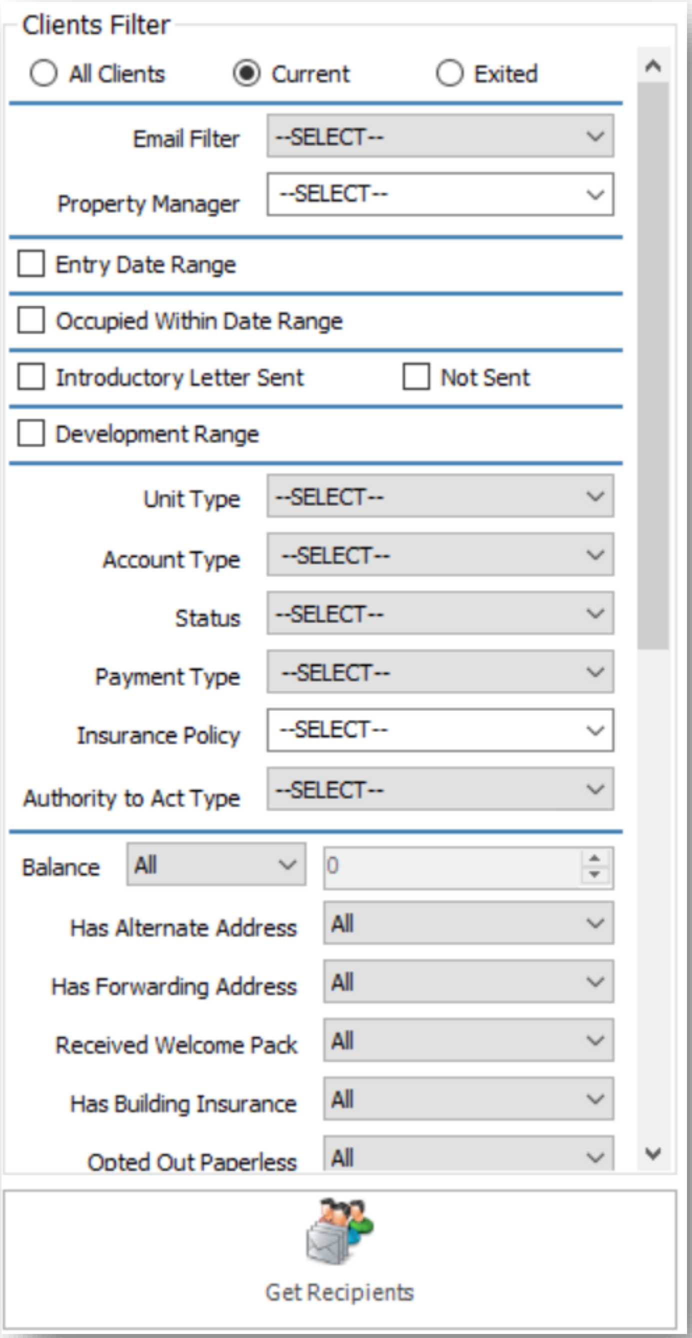
Decide which user you would like the communication to be sent from by choosing a CPL user from your company in the **Sent From** drop-down menu.



RECIPIENT FILTER

In the middle of the **Documents: Distribute (New)** window you will find the recipient filter appropriate to the communication you are sending out. This depends on what you have set as the **Distribute Type** for your communication.

In this example it is the **Clients Filter**.



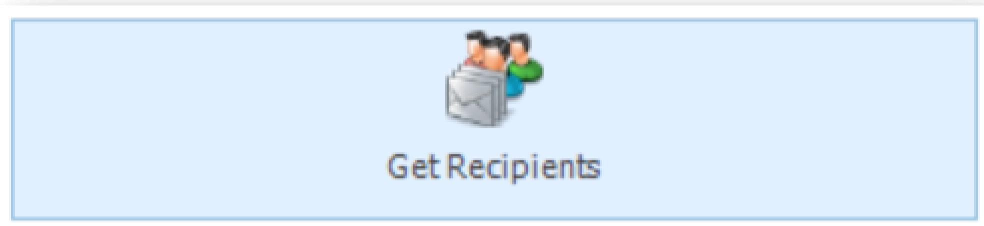
You will find multiple filter fields which provide you with options to select the appropriate clients who you would like to receive your communication. You can work your way through, using multiple filters to narrow down your search.

You can filter by:

- **All Clients/Current Clients/Exited** using the radio buttons at the top of the screen;
- Whether they have chosen to receive correspondence by **Email** or not;
- Which **Office** developments are listed under;
- The developments covered by a specific **Property Manage**;
- Which **Entry Date Range** covers the clients you are looking for;
- Which **Occupied Within** a particular **Date Range** the clients you are looking for;
- Whether clients have been sent an **Introductory Letter** or not;
- A specific **Development Range**;
- A specific **Unit Type**;
- A specific **Account Type**;
- A specific **Status**;
- A specific **Payment Type**;
- A specific **Insurance Policy**;
- A specific **Authority To Act Type**;
- The Clients Outstanding **Balance**;
- If they have an **Alternate Address**;
- If the clients have a **Forwarding Address**;
- If the clients have **Received a Welcome Pack**;
- If the clients have **Building Insurance**;
- If the clients have **Opted Out** of **Paperless**;
- Whether the development has a **Residents Association**;
- If the clients are **Internal** or **External Clients**;
- If the clients have **Opted In To Marketing**;
- If the clients have a **Web User Account**;
- If the clients are a **New Direct Debit Client**;
- If the clients are due their **Introductory Paperless DD Letter**;
- If the clients have an **Elevated DD Payment**.

Depending on which filters you select you will see there are additional filters which appear to further narrow your search.

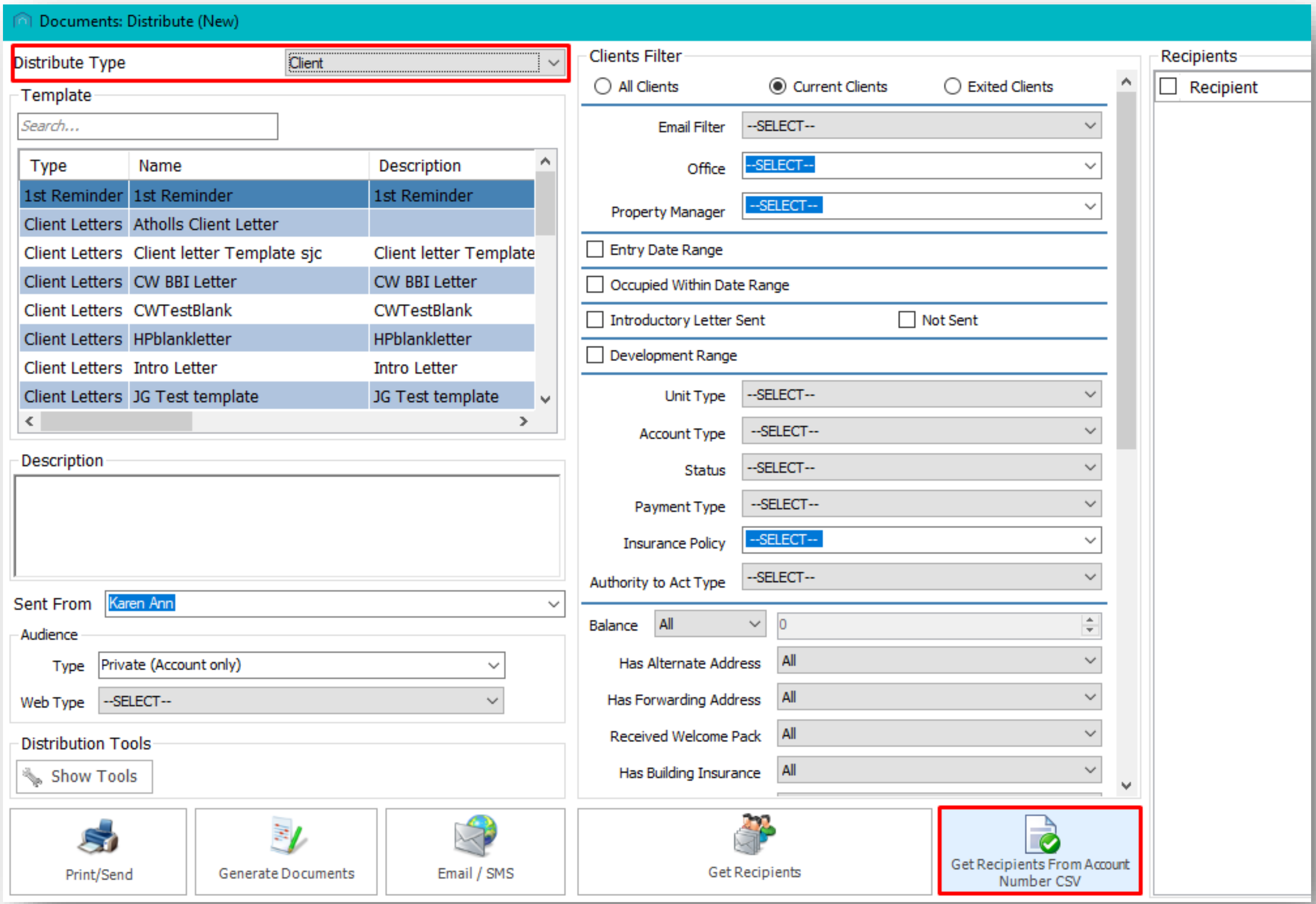
Once you have selected from the filters appropriate for your purpose, click on the **Get Recipients** button at the bottom of the screen.



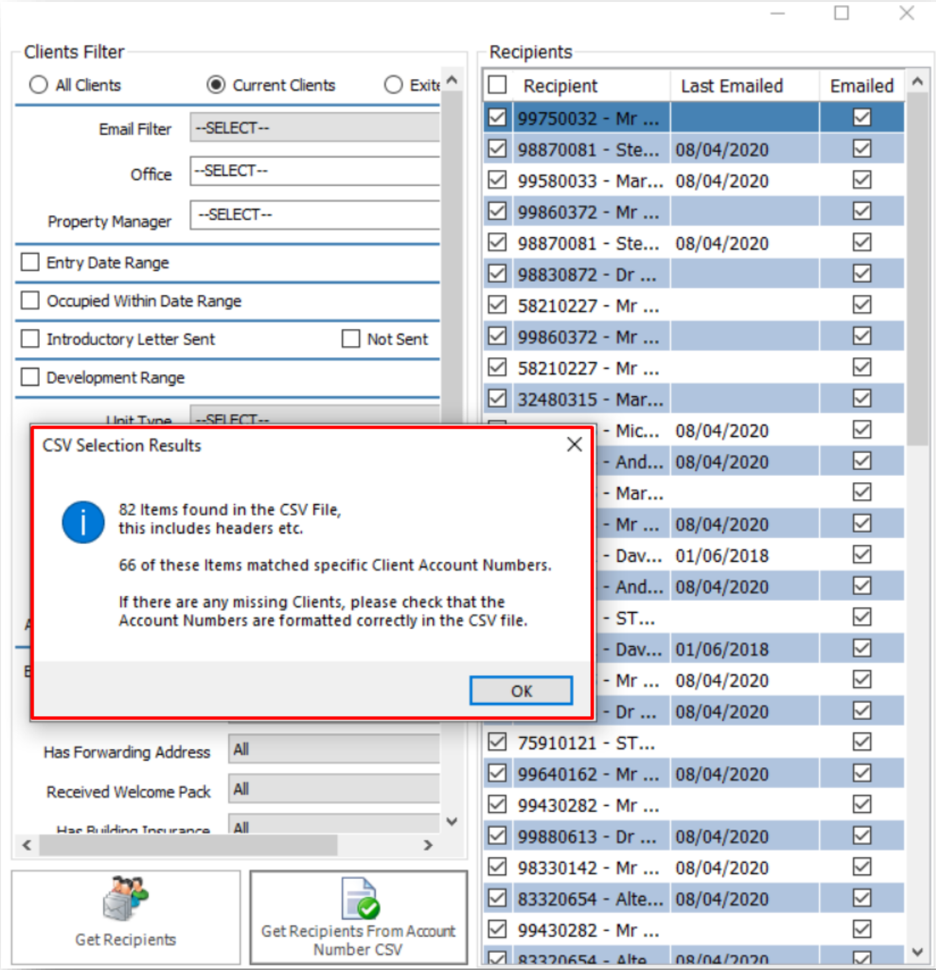
UPLOADING A CLIENT LIST

You can also choose to upload a .CSV file of client account numbers to create your recipients list.

In order to use this feature, click the icon in the bottom right-hand corner of the **Documents: Distribute** screen labelled **Get Recipients from Account Number CSV**. This button will only be available if you have first set your **Distribute Type** to **Client**.



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

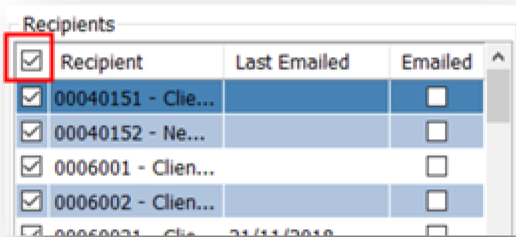


SELECTING RECIPIENTS

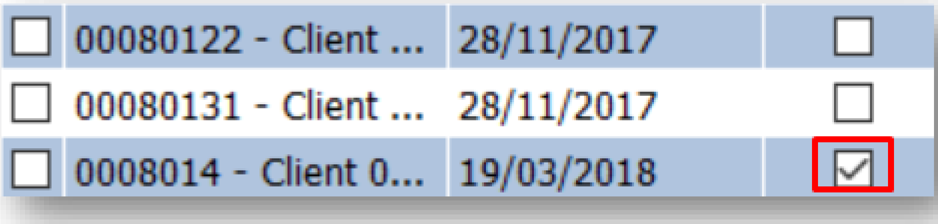
You will see a list of appropriate **Recipients** appear in the column to the right of the screen. These are generated by your choices in the filters you set or in the client account numbers file you uploaded if you selected this option.

In this example, these are clients generated by our choice of filters.

You can select all recipients who appear in the list by placing a tick in the checkbox at the top of the list or you can tick to select individual recipients.



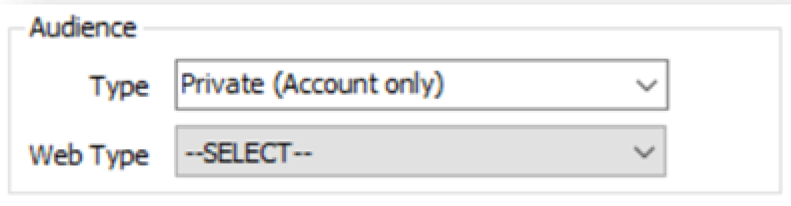
If your recipients have opted to receive their correspondence by email, you will see a tick in the box in the column on the right-hand side of the recipients list.



If there is no tick in this box then they have not opted for email and the communication will be printed in order to be posted out.

On the left of the **Documents: Distribute (New)** window there is a set of **Audience** filters. If you have not subscribed to a Client Web Portal and Client App with CPL, then please leave these set to **Type: Private (Account only)** and **Web Type: –Select—**

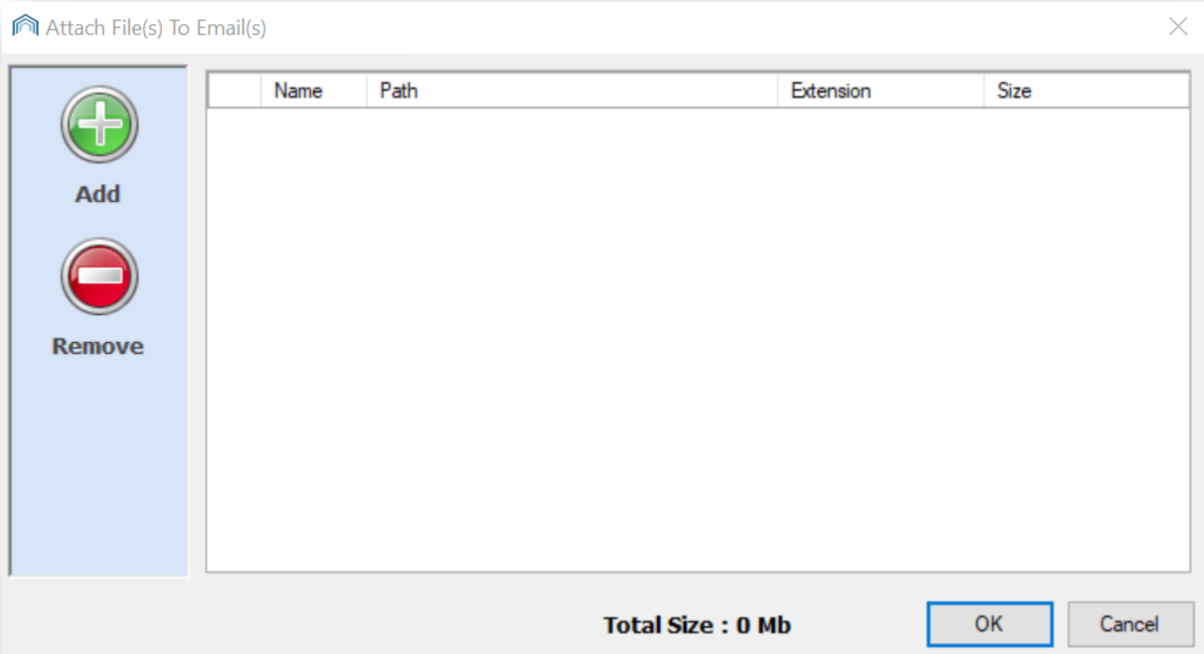
If you have subscribed to the Client Web Portal and Client App with CPL then you can use these to select how your communication will appear in these.



SENDING YOUR COMMUNICATION

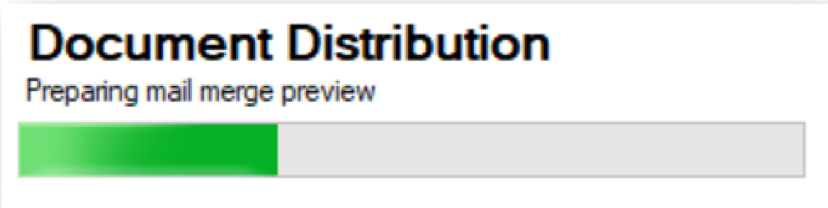
In order to generate the document so that you can check this before you send these out to your recipients click the **Print/Send** button in the bottom left of the window.

You will see a pop-up screen asking if you would like to attach any files to emails which you are sending.



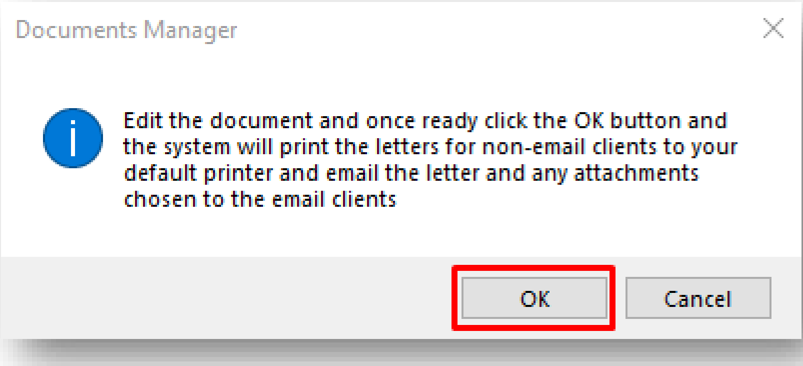
If you wish to do this click the **Add** button and attach any appropriate files. Click **OK** once you have done this or if you would like to proceed without attaching any files.

The system will pup-up a message with a progress bar letting you know that it is preparing your mail merge preview.



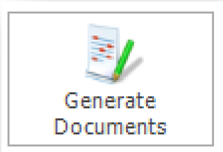
The system will now open your document for you in **Word** and display your merged results if you added mail merge fields. At this point you can add text or make any changes to your document for this particular distribution.

Check the information is correct and click **OK** in the **Documents Manager** pop-up window which appears, without closing Word.

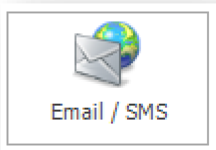


If these mail merge results meet your requirements, accept them and CPL will then email your mail merges to the recipients you selected and/or it will print out copies for you to send.

Please note that clicking on the **Generate Documents** button will add the document to the documents area for whatever recipients you have selected but will not print or email the document.



Clicking on the **Email/SMS** button will have no effect unless this is set up for your system.



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 or through our portal at https://contact.cplsoftware.com/portal/home or calling us on 0345 646 0240 (option 1).