

DOCUMENT TYPES TRAINING GUIDE

CONTENTS

Introduction	3
Permissions	3
Finding the Document Types Feature	3
Adding a New Document Type	4
Amending An Existing Document Type	8
Deleting a Document Type	9
Using Your New Document Type in CPL	11
CPL Knowledge Base	Error! Bookmark not defined.

INTRODUCTION

The **Document Types** feature within CPL allows you to set up categories of documents and to prescribe which CPL areas these will be available from, which areas they will be distributed to and what audience will be able to see them.

This is a very short guide but covers an important area for your use of CPL. Without these set correctly you may find that you are unable to select a certain document type or audience when you are attempting to process your documents within CPL.

PERMISSIONS

In order to begin to amend or set up new document types within CPL you will need to have the correct permissions. If you are a Superuser you will be able to access this feature but any other user would need to have permissions set.

FINDING THE DOCUMENT TYPES FEATURE

Select System from the main menu across the top of the CPL screen.

Move your cursor down to **Documents** in the drop-down menu and select **Types** from the resulting drop-down menu.

File Sys	tem	Documents	Repo	orts	Тс	ols	Sta	ts	Help	Telep
Develor 🎡	Sys	tem Paramete	r ▶	Jobs	Ma	inten	ance	Insu	irance	Hold F
Policy	Doo	cuments	•	F	Di	recto	ories		any	
Fxd_Ir	Tes	ting	•		Te	mpl	ates		Co. 0	Dne
NON-000	_	10011	Normal	ì	Ту	pes				
A101		101	Normal	ġ	Ut	ility				
TestTerr		111111	Normal	_		Gras	pina I	nsura	= ince LL(2

This will open the **System Parameter: Document Types** window which contains a list of the document types already set up in your system along with information about whether they are currently essential in the system, signified by a tick or absence of it in the **System Required** column.

ave 🛛 🐗 🖸	=		
	Document Types		
	Document Type	System Required	^
dd New	1st Reminder		
	Client Demo		
	Client Letters		
1	Client Notices		
Amend	Completed W/Order		
	Deeds		
×	Development Letters		
	Email to contractor		
Delete	Estimate Received		
	Estimate Request		
	Estimate Request Quote		
	Estimate Requested		
	Inspections	V	
	Inspections Done		
	Insurance Claim Letters		
	Insurance Policy Documents		
	Maintenance Contracts		
	Misc		
	Photos		
	PL Letters		
	Plans		~

The blue **Action Panel** on the left of this screen provides the option to **Add New** document types, to **Amend** document types and to **Delete** document types.

The right-hand **System Required** column lets you know which document types are required for CPL to function correctly. You won't be able to delete these but you can still amend them.

ADDING A NEW DOCUMENT TYPE

Clicking the Add New icon on the left will open up the Add Document Type window.

d Document Type		
Document Type Name		
Source Types		
Available	Selected	
Development Development Contacts Development Waranties Estimate Request Estimate Request Inspections/Inspector	*	
Distribute Types		
Available	Selected	
Client Notices Development Contacts Estimate Request Quotes Insurance Claims PL Account pro work	>	
Audience Types		
Audience Types Available	Selected	
Development Development Apportionment Development Block Development Diarised Charges Development Property		

This window allows you to enter a **Name** for your new document type and then select from various parameters:

- the Source of where you would like the document type to be available from
- where you would like to be able to **Distribute** your document type to in CPL
- the **Audience** that you wish to be able to view your document type.

The window is divided into these three main categories and there are **Available** and **Selected** fields available for each of these.

The first step in creating a new document type is to enter a name in the **Document Type Name** field at the top of the window.

D		10.0
Document Type Name	Description of Damage	

Before you can begin to decide on the categories to assign to your new document type you need to click on **Save** at the top of the window.



You will notice that the categories are no longer greyed out and you can begin to add these.

🖻 Document Type 🛛 — 🗆 🗙	
Save Save	
Add Document Type	
Document Type Name Description of Damage	
Source Types	
Available Selected	
Client	
Development > Development Contacts	
Development Warranties	
Estimate Request Estimate Request Quotes	
Inspections/Inspector V	
Distribute Types	
Available Selected	
Client	
Client Notices	
Development Contacts	
Estimate Request Quotes	
PL Account	
pro work DO NOT USE Proposed Works	
Audience Types	
Available Selected	
Client Private (Account only)	
Development >	
Development Apportionment	
Development Block Development Diarised Charges	
Development Diansed Charges	
Estimate Request Quotes	

Using the arrows in the centre of the screen you will be able to decide which **Available** categories you would like to move to the **Selected** field for the new document type you are adding.

You will need to think carefully about the categories you require, to enable you to be able to access and view any document of this type in the system.

Select an option in the **Available** field, click on the forward-facing arrow and this option will then be moved to the **Selected** field.

Client	Development
Development Contacts Development Warranties Estimate Request Estimate Request Quotes Inspections/Inspector Insurance Claims	

If you add an option in error to the selected field you can highlight this and use the backwards facing arrow in the centre to remove this option.

Available Development Contacts Development Warranties Estimate Request Quotes Inspections/Inspector Insurance Insurance Policies pro work DO NOT USE pro work DO NOT USE Proposed Works	▲	Selected Client Development Estimate Request Insurance Claims Jobs IPL Account	
--	---	--	--

Please note that in the **Audience Types** selected field, you cannot remove **Private (Account only)** as this is a system default option.

Available	Selected
Client Notices Estimate Request Quotes PL Account pro work DO NOT USE Proposed Works	Client X Vou cannot remove Private from Audience
ience Types	
vailable	Selected
Development Apportionment Development Block Development Diarised Charges Development Property Internal	Client Development Estimate Request Quotes Jobs Private (Account only)

Continue to select from the options until you have all relevant options moved over to the **Selected** fields.

Document Type			
Document Type Name Description of Da	mage		
Source Types			
Available Development Contacts Development Warranties Estimate Request Quotes Inspections/Inspector Insurance Insurance Policies Jobs PL Account	 > 	Selected Client Development Estimate Request Insurance Claims	
Distribute Types			
Available		Selected	
Client Notices Estimate Request Quotes PL Account pro work DO NOT USE Proposed Wo	> <	Client Development Contacts Insurance Claims	
Audience Types			
Available		Selected	
Development Apportionment Development Diarised Charges Development Diarised Charges Development Property Internal	<	Client Development Estimate Request Quotes Jobs Private (Account only)	

Once you are happy with your selections click **Close** at the top of the window and you will have created a new document type.



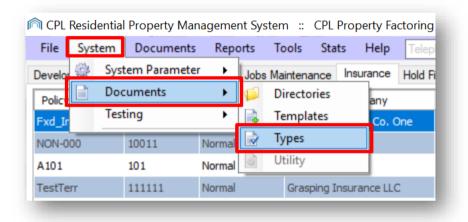
In order for your new document type to be available for you to use in the system you will need to exit from CPL and log back in again.

AMENDING AN EXISTING DOCUMENT TYPE

If you discover that a document type doesn't have all the parameters you need for your purposes, then you can amend this in the **Document Types** screen.

If you have closed the **Document Types** screen, select **System** from the main menu across the top of the CPL screen.

Move your cursor down to **Documents** in the drop-down menu and select **Types** from the resulting drop-down menu.



This will open the System Parameter: Document Types window.

Locate the document type you wish to amend in the list and click on this to highlight it and then on the **Action Panel** on the left click on the **Amend** icon to open up the **Amend Document Types** window.

You can also access the **Amend Document Types** window by double-clicking the document type you wish to amend.

Save	ose		
	Document Types		
	Document Type	System Required	^
Add New	1st Reminder		
	Client Demo		
mm 🦻	Client Letters		
Ľ	Client Notices		
Amend	Completed W/Order		
	Deeds		
×	Description of Damage		
	Development Letters		
Delete	Email to contractor		
	Estimate Received		
	Estimate Request		

You will then be able to use the central arrows to add or remove options between the **Available** and **Selected** fields.

Document Type	– 🗆 X
Save Save	
nend Document Type	
Document Type Name Description of Damage	
Source Types	
Available	Selected
Development Contacts Development Warranties Estimate Request Quotes Inspections/Inspector Insurance Insurance Policies PL Account pro work DO NOT USE	Client Development Estimate Request Insurance Claims Jobs
Distribute Types	
Available	Selected
Client Notices Estimate Request Quotes PL Account pro work DO NOT USE Proposed Works	Client Development Contacts Insurance Claims
Audience Types	
Available	Selected
Development Apportionment Development Block Development Diarised Charges Development Property Internal	 Client Development Estimate Request Quotes Jobs Private (Account only)
L	

When you have made your changes, click **Close** at the top of the window and you will have amended your selected document type.



DELETING A DOCUMENT TYPE

You also have the option to delete a document type as long as it is not one required by the system. If it is, it will have a tick in the **System Required** column in the **Document Types** list and you will not be able to delete it.

Save 🖏 🖸	lose		
	Document Types		
	Document Type	System Required	^
Add New	1st Reminder		
	Client Demo		
****	Client Letters		
1	Client Notices		
Amend	Completed W/Order		
	Deeds		
V	Description of Damage		
×	Development Letters		
Delete	Email to contractor		

To delete a document which is not required by the system make sure you have opened up the **Document Types** menu.

If you have closed the **Document Types** screen, select **System** from the main menu across the top of the CPL screen.

Move your cursor down to **Documents** in the drop-down menu and select **Types** from the resulting drop-down menu.

â CPL 🕅	Resid	ential	Property	Mana	agemer	nt Sys	tem	:: CPL	Prope	erty Fa	ctoring
File	Syst	em	Docume	ents	Repo	orts	Tools	s Sta	ts	Help	Telepl
Develor	100	Syst	tem Param	neter	•	Jobs	Mainte	enance	Insu	rance	Hold Fi
Policy		Doc	uments		►	1		tories		any	_
Fxd_Ir		Test	ting		•		Tem	plates		Co. 0	Dne
NON-0	_		10011		Normal		Туре	s			
A101			101		Normal	à	Utilit	у			
TestTe	rr		111111		Normal		Gr	asping I	nsura	= nce LL(:
											_

This will open the System Parameter: Document Types window.

Locate the document type you wish to delete in the list and click on this to highlight it.

Then, on the Action Panel on the left, click on the Delete icon.

<u>Save</u> 🏭 <u>C</u> le	ose		
	Document Types		
	Document Type	System Required	^
Add New	1st Reminder		
	Client Demo		
mm	Client Letters		
4	Client Notices		
Amend	Completed W/Order		
	Deeds		
🖌 🖌 👘	Description of Damage		
Delete	Development Letters		
	Email to contractor		
	Estimate Received		
	Estimate Request		

Your document will be deleted and no longer appear on the list of document types.

USING YOUR NEW DOCUMENT TYPE IN CPL

You will be able to use your new document type in a number of areas in the system depending on the options you set.

As an example, we'll go to the main **Documents** area and choose to receive a document using the new type we've created.

Click on the **Documents** tab in the main CPL screen and select the **Receive In** option from the dropdown menu.

Receive In Send Out	Doo	uments	Reports
	6	Receive	In
	\$	Send Ou	ıt
Reprint Letters		Reprint l	Letters

This will open the main **Documents: Receive** screen.

Start by selecting an appropriate **Source Type** from the drop-down menu.

n Documents: Receive	1	
🛃 <u>S</u> ave 🛛 🐳 <u>C</u> lose		
Documents: Receive		_
Source Type	-SELECT Client Development Development Contacts Development Warranties Estimate Request Estimate Request Quotes Inspections/Inspector Insurance Claims Insurance Insurance Policies Jobs PL Account pro work DO NOT USE pro work DO NOT USE Proposed Invoice Query	

You will then be able to select the document type you have added if you previously assigned the source type you have selected.

Source Type	Client	~
Development	0008 Balmedie Heights	~
Client	00080041 Client 00080041	~ <i>©</i>
Document Type	-SELECT-	~
Web Document Type	-SELECT 1st Reminder	
Description	Client Demo Client Letters Deeds	^
Upload File	Description of Damage Inspections Inspections Done Insurance Claim Letters Maintenance Contracts Misc Photos Plans Service Charges Work Request from AHS	~

You will also be able to select from the audience types you previously set up for your document type.

n Documents: Receive	
🚽 Save 🛛 🖏 Close	
Documents: Receive	
Source Type	Client ~
Development	0008 Balmedie Heights 🗸
Client	00080041 Client 00080041 V
Document Type	Description of Damage
Web Document Type	-SELECT- V
Description	Client has sent in an email describing damage to the common hallway floor tiles.
Upload File	
Audience Type	Private (Account only) -SELECT Client Development Estimate Request Quotes Jobs Private (Account only)

CPL KNOWLEDGE BASE

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

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).

Copyright © 2020 CPL Software Ltd

All rights reserved. No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in critical reviews and certain other non-commercial uses permitted by copyright law.