



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

DOCUMENT TYPES

TRAINING GUIDE

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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.

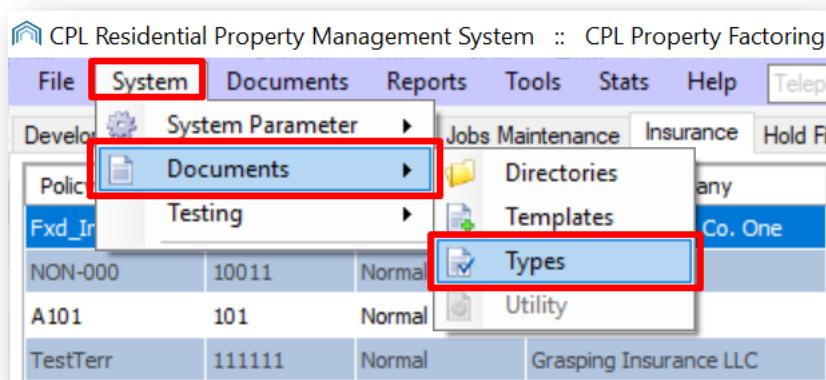
PERMISSIONS

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.

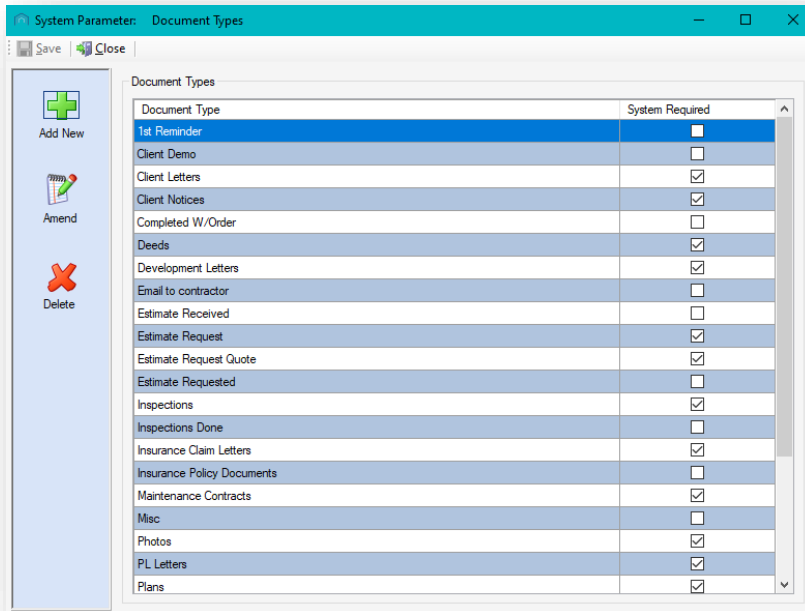
FINDING THE DOCUMENT TYPES FEATURE

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.



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.

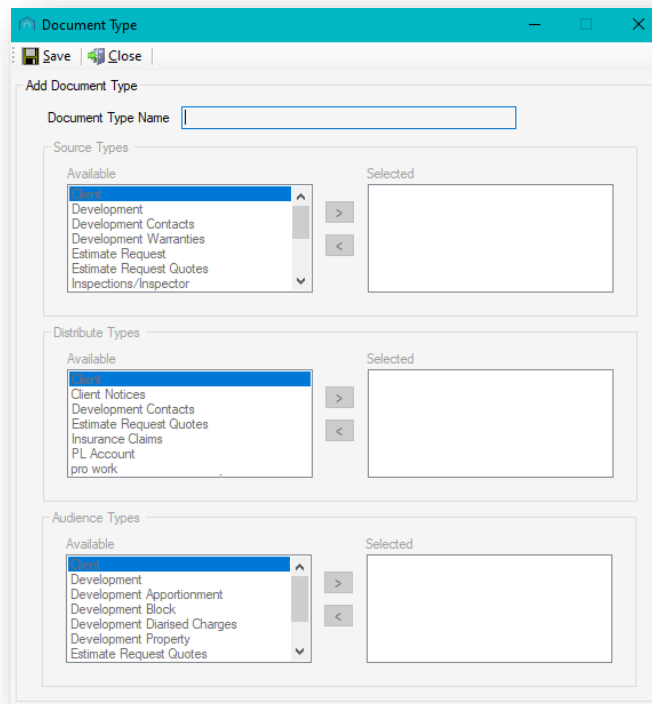


The blue **Action Panel** on the left of this screen provides the option to **Add New** document types, to **Amend** document types and to **Delete** document types.

*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.

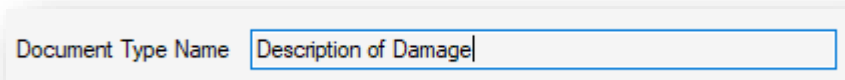


This window allows you to enter a **Name** for your new document type and then select from various parameters:

- 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.

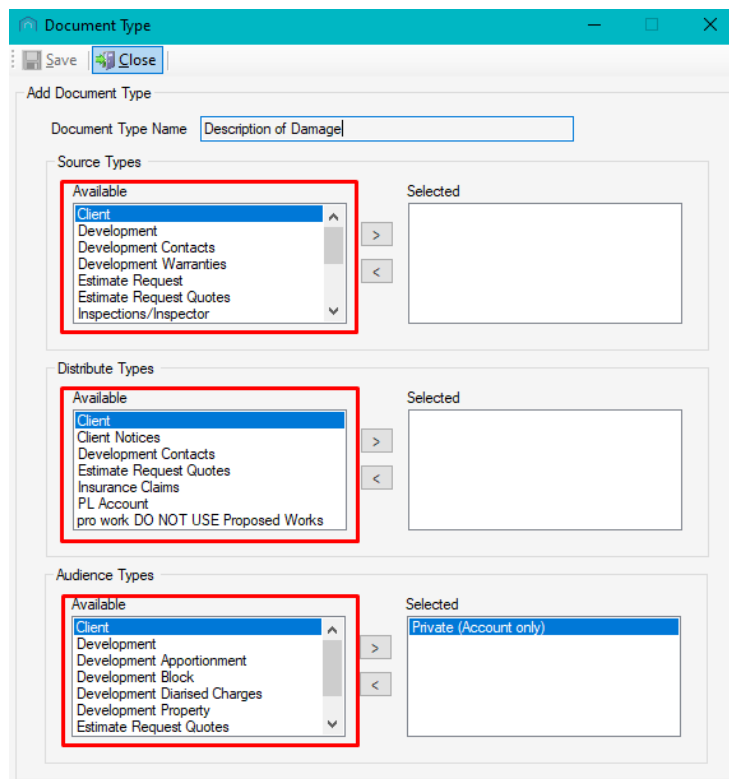
The first step in creating a new document type is to enter a name in the **Document Type Name** field at the top of the window.



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.



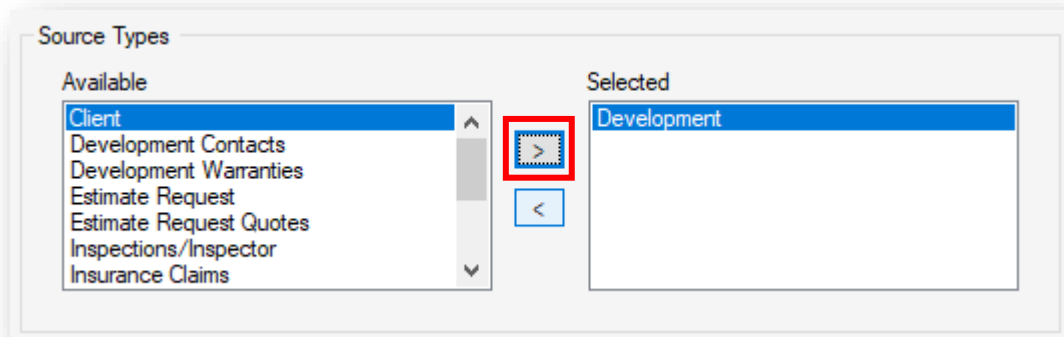
You will notice that the categories are no longer greyed out and you can begin to add these.



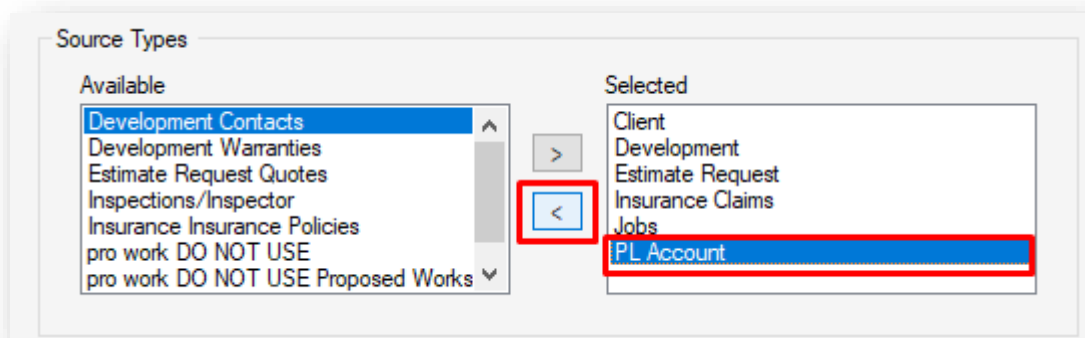
Using the arrows in the centre of the screen you will be able to decide which **Available** categories you would like to move to the **Selected** field for the new document type you are adding.

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.

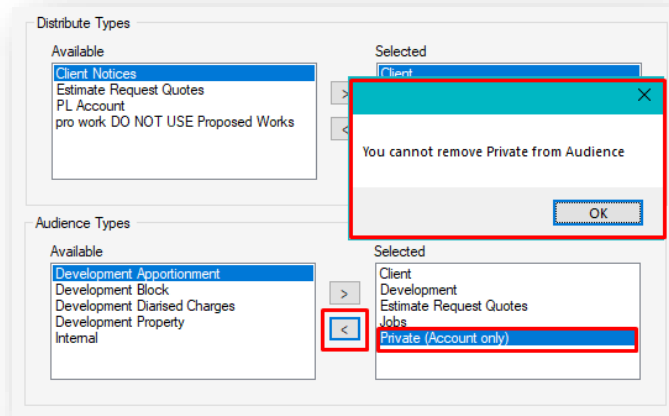
Select an option in the **Available** field, click on the forward-facing arrow and this option will then be moved to the **Selected** field.



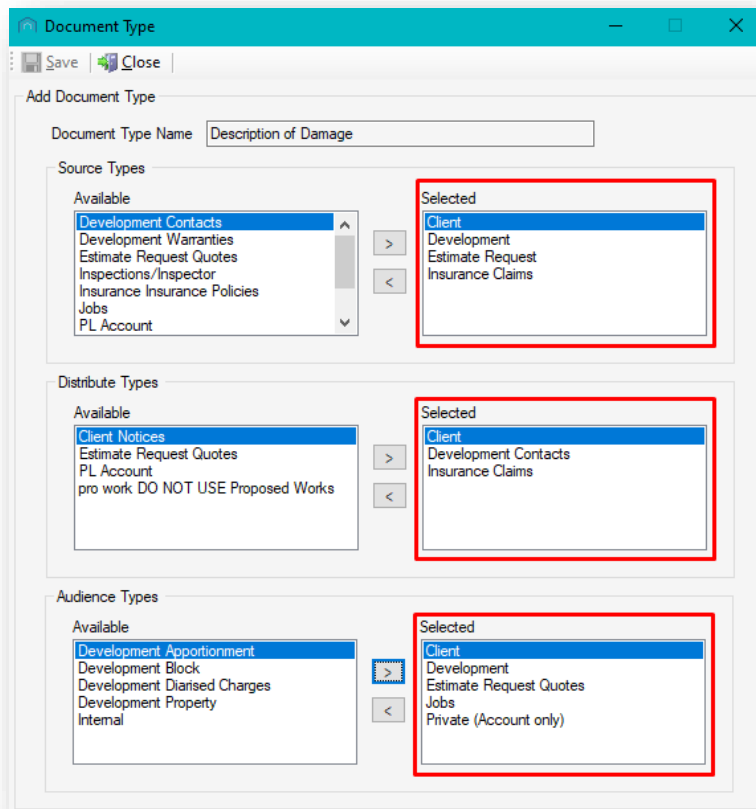
If you add an option in error to the selected field you can highlight this and use the backwards facing arrow in the centre to remove this option.



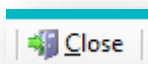
Please note that in the **Audience Types** selected field, you cannot remove **Private (Account only)** as this is a system default option.



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



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



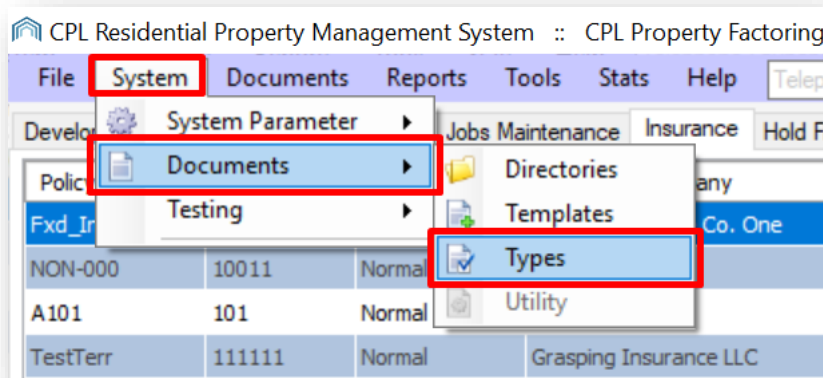
In order for your new document type to be available for you to use in the system you will need to exit from CPL and log back in again.

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.

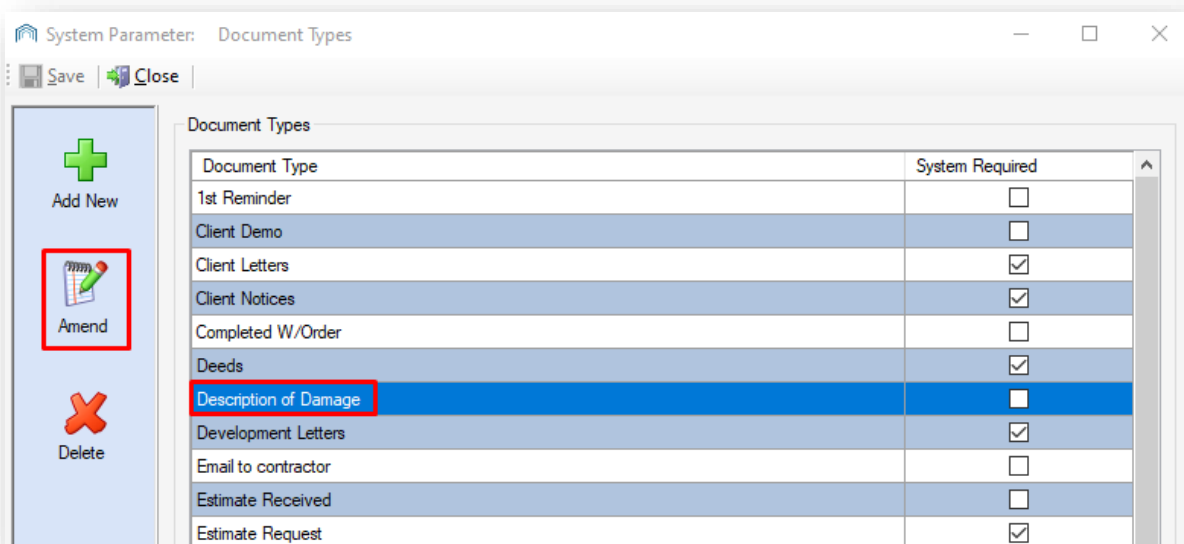
Move your cursor down to **Documents** in the drop-down menu and select **Types** from the resulting drop-down menu.



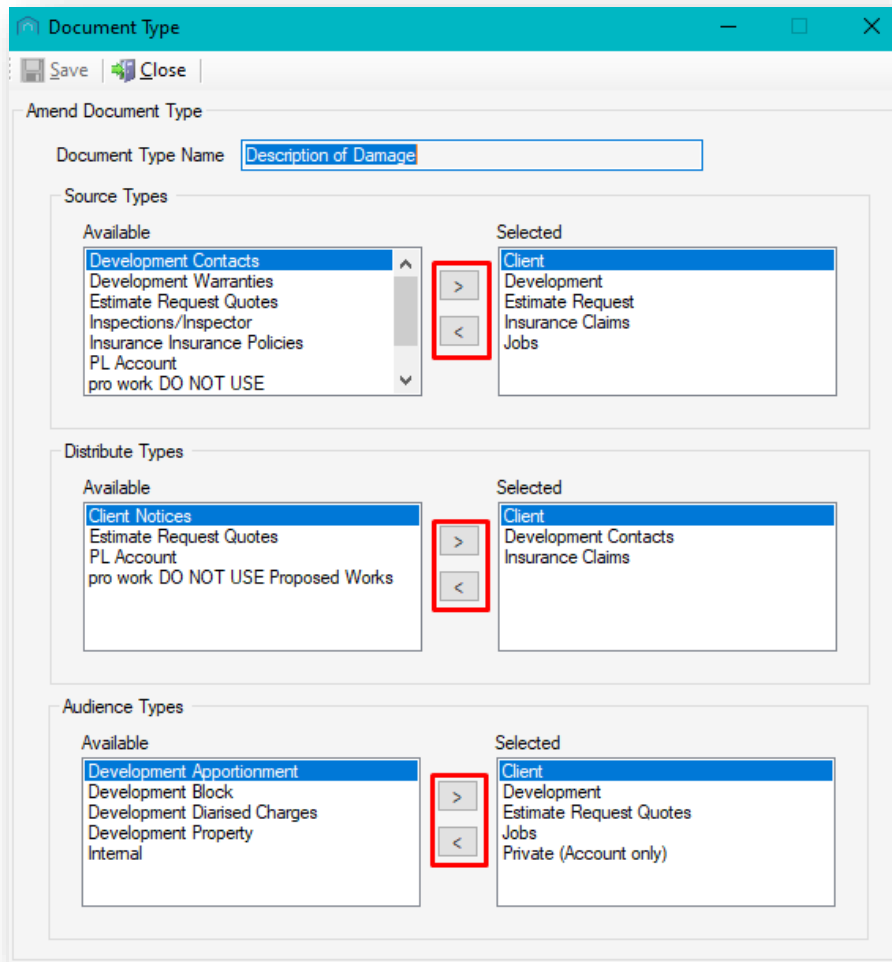
This will open the **System Parameter: Document Types** window.

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.

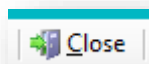
You can also access the **Amend Document Types** window by double-clicking the document type you wish to amend.



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

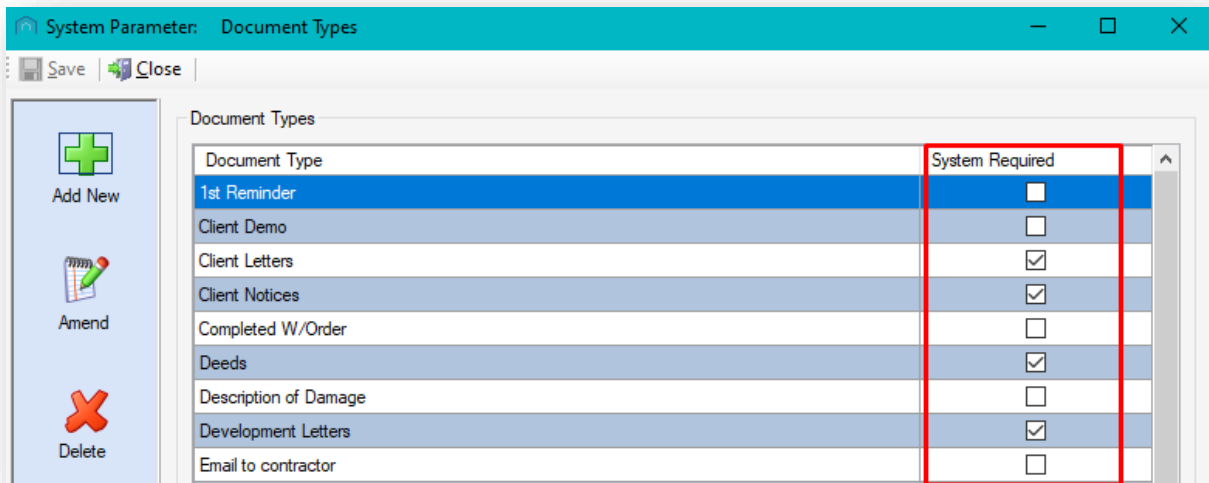


When you have made your changes, click **Close** at the top of the window and you will have amended your selected document type.



DELETING A DOCUMENT TYPE

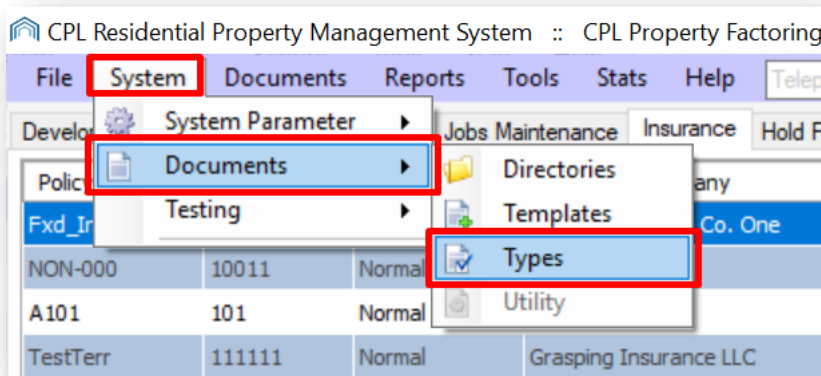
You also have the option to delete a document type as long as it is not one required by the system. If it is, it will have a tick in the **System Required** column in the **Document Types** list and you will not be able to delete it.



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.



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.



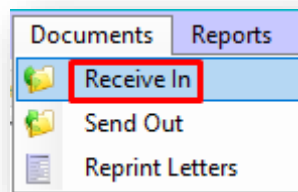
Your document will be deleted and no longer appear on the list of document types.

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.

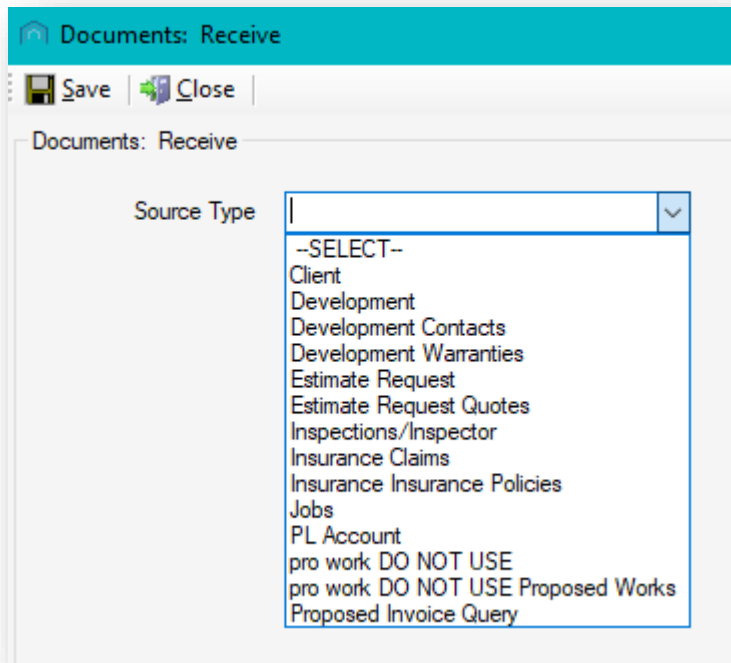
As an example, we'll go to the main **Documents** area and choose to receive a document using the new type we've created.

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

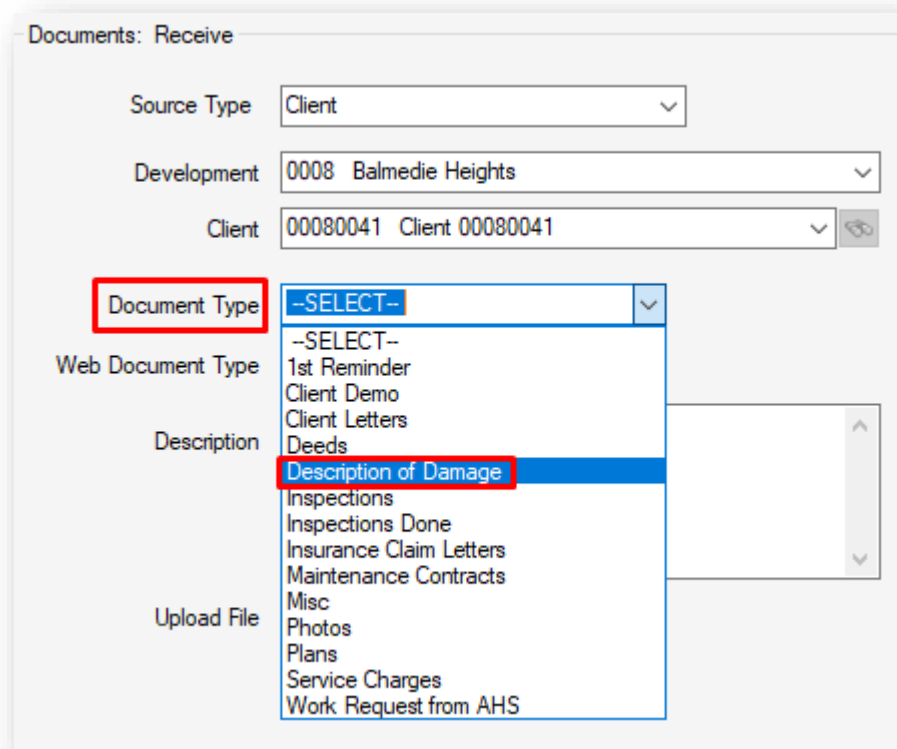


This will open the main **Documents: Receive** screen.

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



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



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

Documents: Receive

Save Close

Documents: Receive

Source Type Client

Development 0008 Balmedie Heights

Client 00080041 Client 00080041

Document Type Description of Damage

Web Document Type --SELECT--

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)

Print QR Code

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).