



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

ESTIMATES

TRAINING GUIDE

FEB 2021

Version 1.4

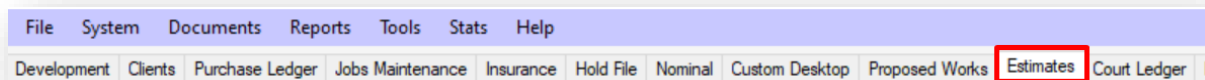
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CREATING A REQUEST FOR QUOTES.

Different people use different phrases when talking about estimates. Some use Quotations, some use Estimates. CPL has been set up to use the word **Estimate** so please treat this as whatever you would normally refer to in your business.

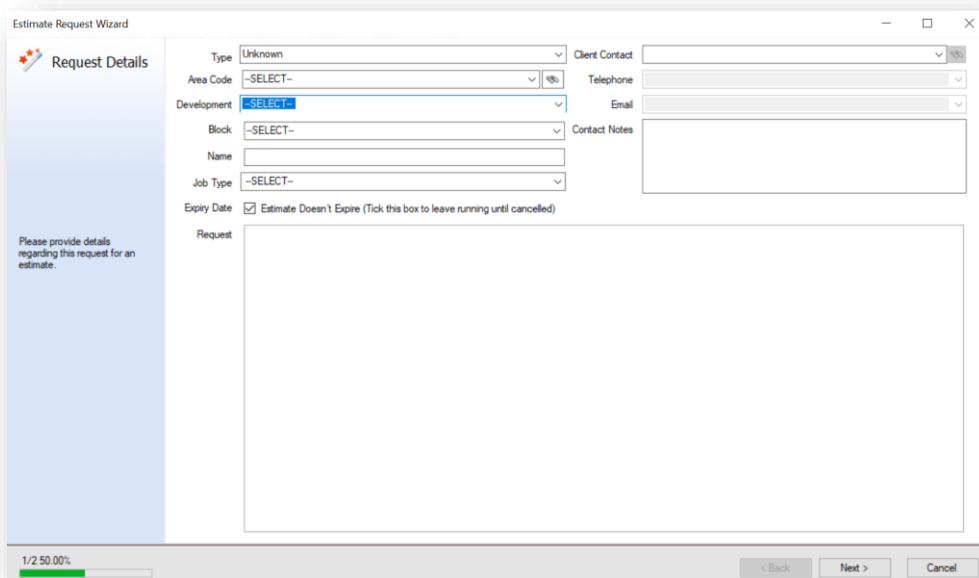
To get started with this click to open the **Estimates** tab in the main CPL window.



Select the **Add** icon in the blue highlighted action panel just below the middle of the screen.



This will open the **Estimate Request Wizard** window which will guide you through the process of requesting the quotes.




You will need to provide the system with the details of the job you are requesting estimates for.

Select the **Type** from the drop-down list. This is a list of overall job types, for instance a maintenance job or something being done under the insurance policy held on the property.

Type	Unknown
Development	Insurance Claim Proposed Work Job
Block	Maintenance Unknown
Name	

If you require your estimate to transition to become a proposed work then choose **Proposed Work** from the menu of types.

Estimate Request Wizard


Request Details

Type **Proposed Work**

Use the **Development** and **Block** drop-down menus to select the appropriate development and block (if appropriate) where the work is required to aid your Contractor:

Development	1101 Bakersfield Heights
Block	0001 St. Canices's Park Street Finglas

A **Name** for the estimate request can be entered in the following field. This will help you identify the estimate/ job when you need to find it again in other parts of CPL so try to be succinct but descriptive.


Name	Removal of fallen tree from front entrance to Block.
------	--

The **Job Type** field allows you to be specific about the type of task that your contractors will be bidding on.

Job Type	TR Tree Surgeon
Expiry Date	FP Flood Prevention
	GAS Gas Check
Request	GL Glazier
	GM Grounds Maintenance
	GR Path Gritting
	GU Gutter Cleaner
	IN-HOUSE In House
	JO Joiner
	LI Lift Maintenance
	LO Locksmith
	Misc Misc
	MTH Repeat Monthly - Freq. set to 12 pa
	PA Painter
	PE Pest Control
	PI Playground Inspection
	PL Plumber
	PM Playground Maintenance
	RE Refuse Remover
	RO Roofer
	SC Stairwell Cleaner
	SI Sign Printer
	SL Slater
	SM Stonemason
	ST Steel Fabricator
	SU Hard Surfacing
	TE Telephone Maintenance (Lift)
	TI Tiler
	TR Tree Surgeon
	VE Vehicle Remover
	WA Waller

The **Expiry Date** field enables you to set a deadline for replies from your contractors. The calendar option will show unless you tick the **Estimate Doesn't Expire** option.

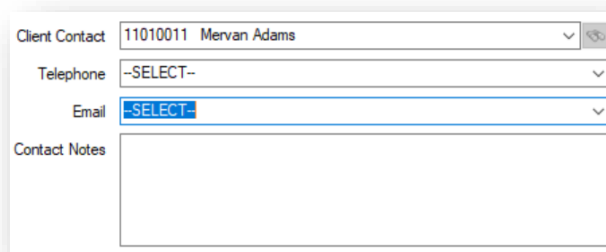
If required, click the dropdown box and set the date.

Expiry Date	18 July 2019	
<input type="checkbox"/> Estimate Doesn't Expire (Tick this box to leave running until cancelled)		

If appropriate, you can select a **Client Contact** on-site for the development that the contractor may need to get in touch with. The list available is dependent on what you chose for the **Development** and **Block** fields on the left.

Alternatively, you can use the search icon to find clients associated with the development/block. If you have selected a **Client Contact**, the **Telephone** and **Email** fields will allow you to select from the contact information held for this client in CPL.

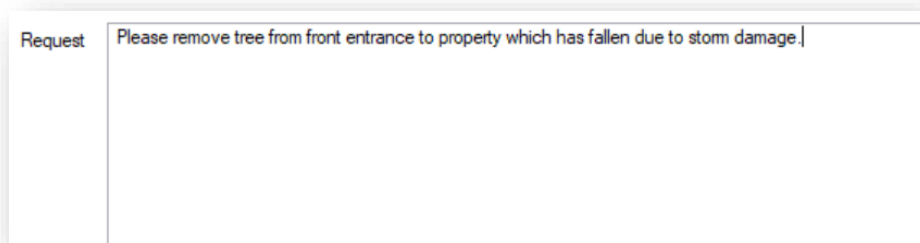
In addition, there is a **Contact Notes** box where you can leave specific instructions for contractors. You may wish to leave details such as "Only Available between the hours of..." or "works from home and may be available during the day."



A screenshot of a software form titled 'Client Contact'. It contains four fields: 'Client Contact' (a dropdown menu showing '11010011 Mervan Adams'), 'Telephone' (a dropdown menu showing '--SELECT--'), 'Email' (a dropdown menu showing '--SELECT--'), and 'Contact Notes' (a large text area).

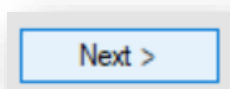
The lower half of this screen contains the **Request** box which allows you to leave a more detailed explanation of the work required to enable the contractor to put together a quote for you.

Please bear in mind that this description will have to fit onto the contractor template you have set up in CPL.



A screenshot of a software form titled 'Request'. It contains a single text field with the text 'Please remove tree from front entrance to property which has fallen due to storm damage.'

When you have completed this, click on the **Next** option towards the bottom right-hand corner of the screen.

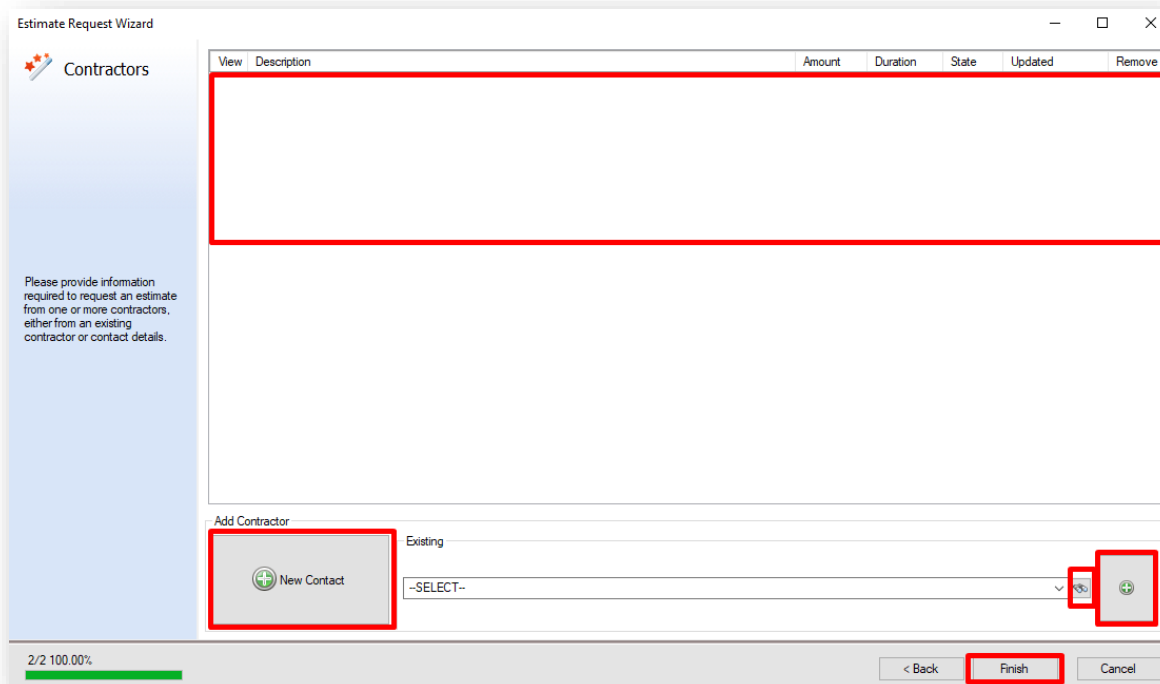


SELECTING CONTRACTORS

On this page you will enter the details of the contractors you are inviting to quote for the work/ goods/ services you require.

The **Estimate Request Wizard** will now move you onto the **Contractors** screen where you are able to enter the details for the contractors you would like to invite to quote for the work you require.

The screen comprises an upper area, or grid where contractors will be listed once you add them and a lower area, labelled **Add Contractor** which allows you to choose how you will add your contractors.



You will notice there is a progress bar at the bottom-left of the page.

Select the drop-down menu in the box labelled **Existing** for contractors who you have previously used. Alternatively, you can use the search icon to search for an existing contractor in the system.

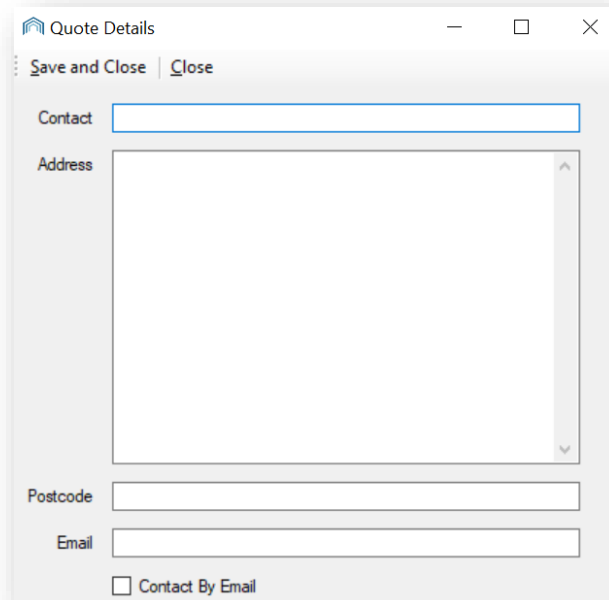


Once you have found a contractor you would like to use, click on the **Plus** icon on the right to add the selected contractor to your **Estimate Request**. They will appear in the list in the grid at the top of the screen.

If you would like to temporarily add a contractor you haven't previously used then click the **New Contact** button.

Please note this is for this estimate only and the Contractor will not be added to the system. You will need to add them through the Purchase Ledger if you'd like to use them for the job.

This will open a new **Quote Details** window for you to add their contact details:



Quote Details

Save and Close | Close

Contact

Address

Postcode

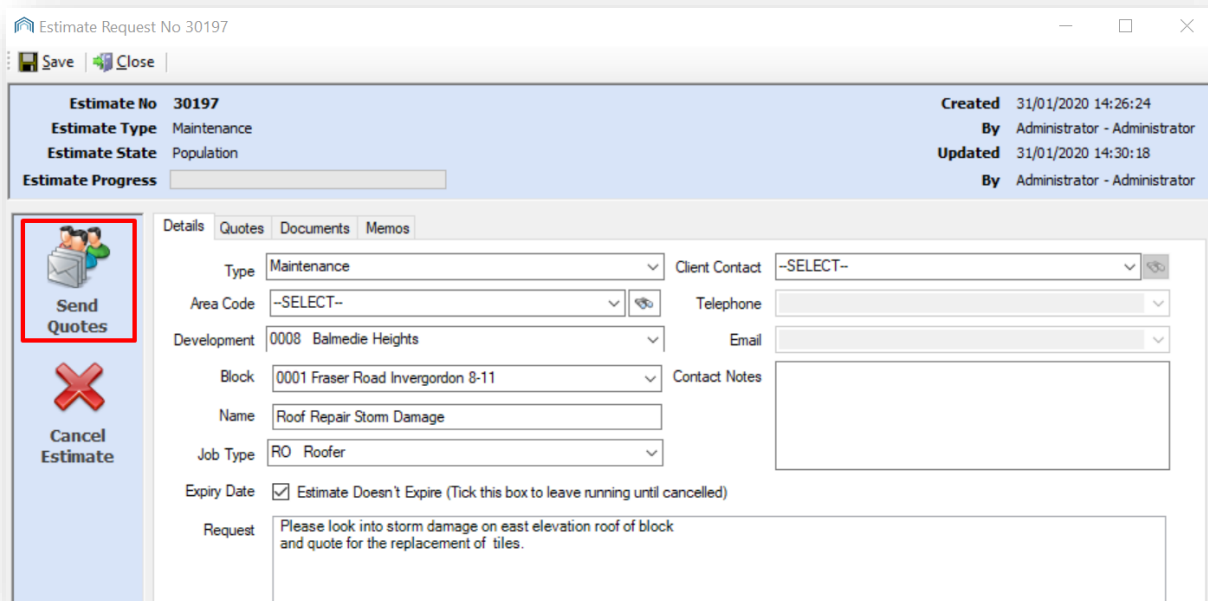
Email

☐ Contact By Email

If you have added a new contractor to request a quote from then click **Save and Close** once you have entered their details and they will be added to your list to request quotes from.

Once all the contractors you wish to request estimates/ quotes from are selected and added to the list, click on the **Finish** button.

An **Estimate Request** screen will open, displaying the information you have already entered.



Estimate Request No 30197

Save | Close

Estimate No 30197	Created 31/01/2020 14:26:24
Estimate Type Maintenance	By Administrator - Administrator
Estimate State Population	Updated 31/01/2020 14:30:18
Estimate Progress	By Administrator - Administrator

Details | Quotes | Documents | Memos

Send Quotes (icon)

Cancel Estimate (X icon)

Type: Maintenance | Client Contact: --SELECT--

Area Code: --SELECT-- | Telephone:

Development: 0008 Balmedie Heights | Email:

Block: 0001 Fraser Road Invergordon 8-11 | Contact Notes:

Name: Roof Repair Storm Damage

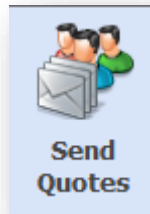
Job Type: RO Roofer

Expiry Date: ☒ Estimate Doesn't Expire (Tick this box to leave running until cancelled)

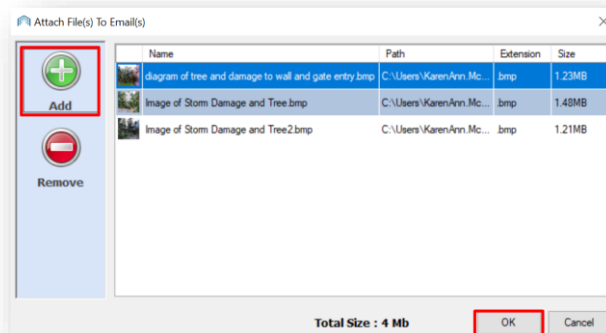
Request: Please look into storm damage on east elevation roof of block and quote for the replacement of tiles.

Review the information you are about to send to your contractors, checking for any mistakes.

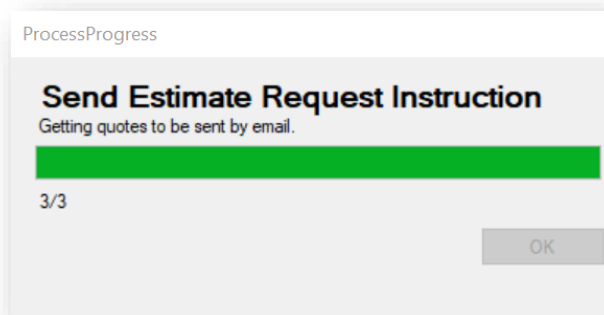
When you are ready, click the **Send Quotes** icon in the left-hand side action panel to send the quote request to your contractors.



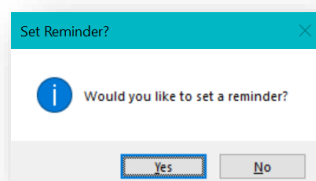
A new **Attach File(s) To Email** window will open where you can add any images or files you feel may be relevant for the contractors to help them produce their quotes. For example, images of damage or where a repair is required.



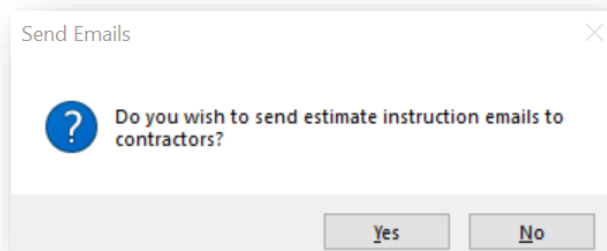
You will see a **ProcessProgress** window letting you know your files are getting ready to be uploaded:



You will also see a pop-up message asking if you would like to set a reminder on the system to enable you to check back and chase any contractors for quotes you have not received. If you wish to, select **Yes** and you will be able to set a date, otherwise select **No**.



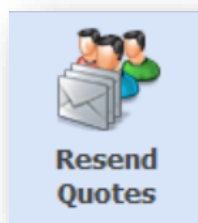
Once you set or dismiss this option you will be asked, **Do you wish to send estimate instruction emails to contractors?** This will be the case if your contractor information in CPL stipulates email as the default contact method.



After your emails have been processed and sent by CPL, you will see a **Success** window telling you this and you can click on **OK** to dismiss this:



On your **Estimate Request** window, you will notice that the **Send Quotes** icon has now changed to **Resend Quotes** because these have already been sent. You have the option to resend the Quotes if the contractors have not got back to you within your expected timeframe.

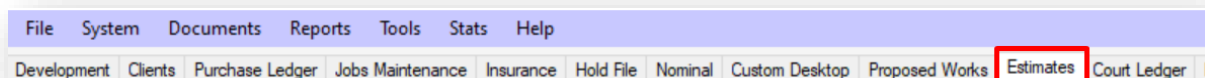


You may now close the window.

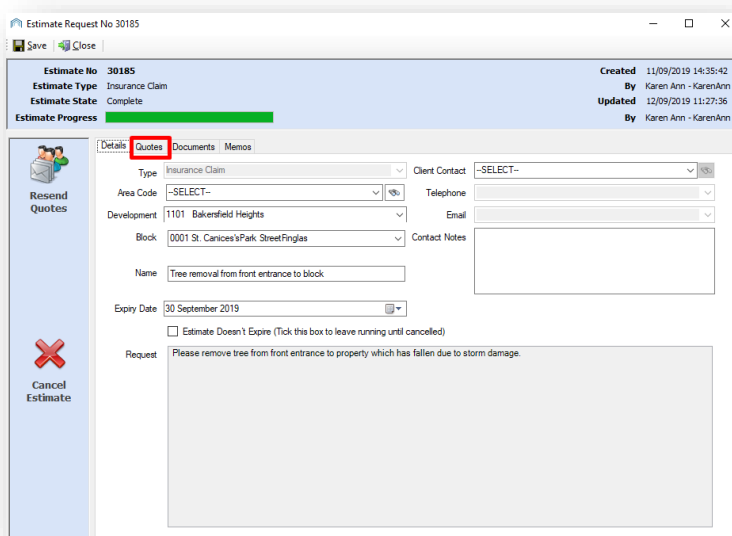
If your company uses the Blockworx platform to communicate with your contractors, then quote requests will now be listed in the contractors' Blockworx portal. They can use the portal to send comments/questions about the quote request and to submit their quotation.

RECORDING A QUOTE RECEIVED

On receiving a Quote from a Contractor, you have the option to enter it against the Estimate entry in CPL. To do this, return to the **Estimates** tab in the main CPL window.

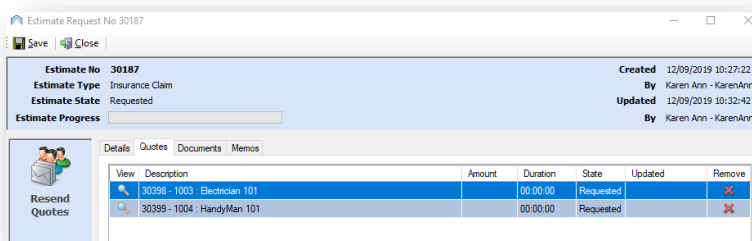


Your estimate will be listed in the grid. If you don't immediately see your Estimate then use the **Estimate/Filter Search** at the bottom of the screen to find it. Double-click your Estimate in the grid to open this in a new window.



The screenshot shows the 'Estimate Request No 30185' window. The 'Quotes' tab is selected and highlighted with a red box. The window displays details for an 'Insurance Claim' with a 'Complete' state. The 'Estimate Progress' bar is green. The 'Details' section includes fields for Type (Insurance Claim), Area Code (-SELECT-), Development (1101 Bakersfield Heights), Block (0001 St. Canices/Park Street/Pinglas), Name (Tree removal from front entrance to block), Expiry Date (30 September 2019), and a Request field with the text 'Please remove tree from front entrance to property which has fallen due to storm damage.' The 'Client Contact' field is set to '-SELECT-'. The 'Resend Quotes' button is visible on the left, and the 'Cancel Estimate' button is at the bottom left.

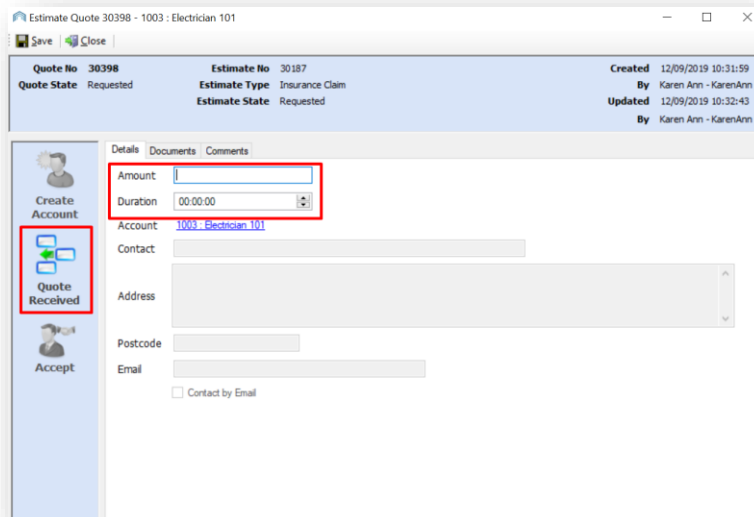
Click on the **Quotes** tab and then select the contractor you received the quote from by double-clicking the correct line.



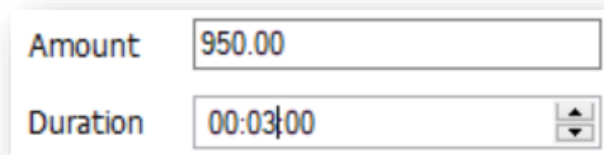
The screenshot shows the 'Estimate Request No 30187' window. The 'Quotes' tab is selected. The window displays details for an 'Insurance Claim' with a 'Requested' state. The 'Estimate Progress' bar is yellow. The 'Details' section includes fields for Type (Insurance Claim), Area Code (-SELECT-), Development (1101 Bakersfield Heights), Block (0001 St. Canices/Park Street/Pinglas), Name (Tree removal from front entrance to block), Expiry Date (30 September 2019), and a Request field with the text 'Please remove tree from front entrance to property which has fallen due to storm damage.' The 'Client Contact' field is set to '-SELECT-'. The 'Resend Quotes' button is visible on the left, and the 'Cancel Estimate' button is at the bottom left.

View	Description	Amount	Duration	State	Updated	Remove
	30398 - 1003 - Electrician 101		00:00:00	Requested		
	30399 - 1004 - HandyMan 101		00:00:00	Requested		

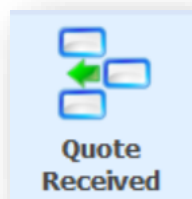
This will open the details window for the quote from that contractor.



Enter the amount quoted and the expected duration of the work (in days: hours: minutes).



Once all details are entered click the **Quote Received** icon in the **Action Panel** on the left of the window.



Repeat these steps for any other quotes you have received from additional contractors.

You may now close the window.

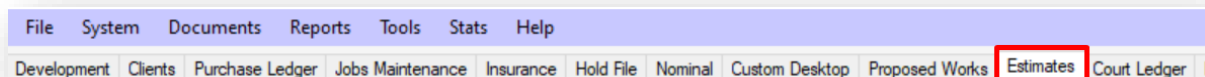
QUOTES SUBMITTED VIA BLOCKWORX

Please note that if you are working with contractors who are using the Blockworx platform that any quotes submitted by them will automatically update the individual Estimatee **Quote Detail** tab information with the **Amount** and **Duration** for their quote.

The **Comments** tab for the Estimatee Quote will contain any questions/ comments from the contractor and a copy of their submitted quote.

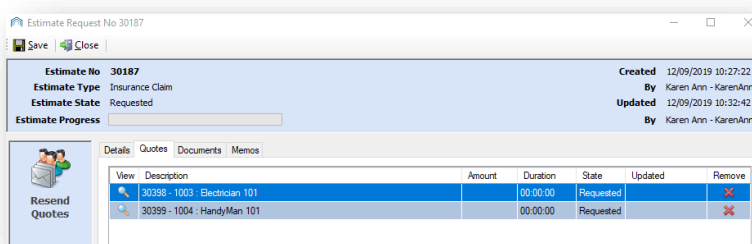
ACCEPTING A QUOTE

To accept a Quote, click to open the **Estimates** tab in the main CPL window.



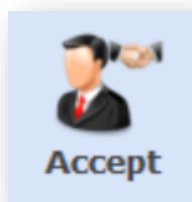
Your estimate will be listed in the grid. If you don't immediately see your Estimate then use the **Estimate/Filter Search** at the bottom of the screen to find it. Double-click your Estimate in the grid to open this in a new window.

Click on the **Quotes** tab and then select the Contractor you wish to accept a quote from by double-clicking the correct line.

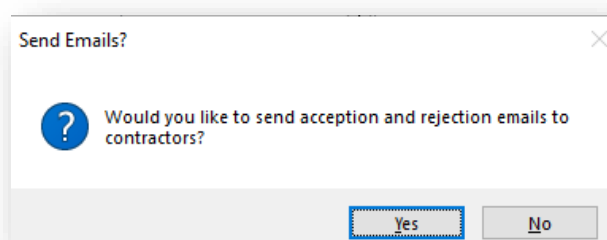


This will open the details window for the quote from that contractor.

Click the **Accept** icon in the **Action Panel** on the left of the window.



CPL will pop up a window asking if you would like to **send acceptance and rejection emails to contractor?** Click on **Yes** if you would like to send these emails.



CPL can send an acceptance email to your chosen contractor and rejection emails to any other contractors you added to the estimate. This is determined by a system setting.

The **Documents** tab for a particular quote will store any email correspondence between you and the contractor automatically:

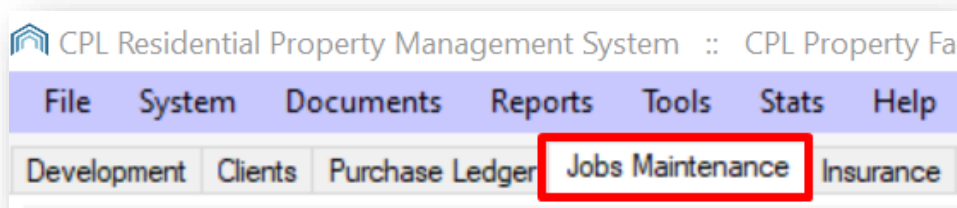
*Your requests will be sent using the **Estimate Quote Accept** and **Estimate Quote Reject** email templates which are set up in CPL for you by default. These templates can be edited by accessing them through **System** and then **System Parameter** and then **Email Properties**. Double-click on the template you wish to edit and save this when you are finished.*

You will notice on your **Estimate Request** window that the progress of your estimate is now complete and the **State** column in the grid now records the status of the quotes as **accepted** and **rejected**.

You can then close the **Estimate Request** window and your job window will open.

RAISING YOUR JOB

Your Estimate will now have become a job, and can from this point on be found in the **Jobs Maintenance** tab in CPL.



Use the **Job/Maintenance Filter/Search** to locate your job in the grid and double-click on this to open it up.

Job for Development: 0008 Balmedie Heights

Job Order	Task Status Stage	Address
Development 0008 Balmedie Heights Property Karen Ann		

Warnings **There are (3) W/M Contracts associated with this Development.** Notices None

Stage 1: Create Job | Stage 2: Create Work Order | Stage 3: Complete Work Order | Job Memos | Documents | Comments

Stage 1: Create Job & Assign to Next User

Int. Job Date: 31/01/2020 Int. Job Time: 17:42 Client Account: --SELECT--
 Job Type: RO Roofer Telephone:
 Area Code: --SELECT--
 Development: 0008 Balmedie Heights Allocated User: Administrator Next User: Administrator
 Block Number: 0001 Fraser Road Invergordon 8-11
 Job Number Type: Repair

Action: ☒ YES ☐ NO

Client Emails

Description: Please look into storm damage on east elevation roof of block and quote for replacement of tiles.

Please ensure that the description falls within the bounds of the box. If not, your text may be too big for the work order.

Press F5 for Standard Descriptions

View Contracts View Memos View Development Print Work Order Email Work Order Cancel **Create New Job** Email RAMs

The information entered previously at estimate level will have automatically transferred over, however now there are an additional number of boxes which need populated as we have gone from estimating to creating the job and work order.

Please check all details of the job are correct before proceeding to click **Create New Job**.

You may want to edit the **Description** field to give additional information now that you are moving ahead with the job and not just requesting a quote.

Description	Please replace tiles caused by storm damage on east elevation roof of block.
-------------	--

Please ensure that the description falls within the bounds of the box. If not, your text may be too big for the work order.

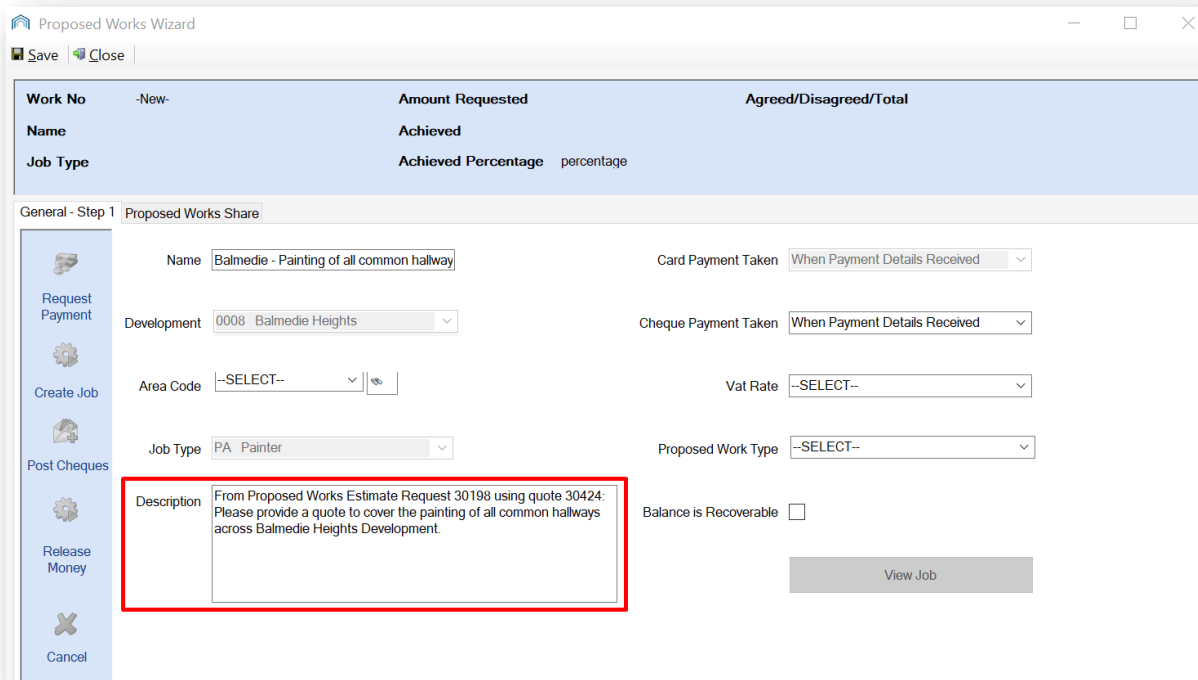
Press F5 for Standard Descriptions

When you have clicked **Create New Job** you will move onto stage 2 of the jobs process on the second tab. This will let you move ahead with creating a work order.

You can continue to move through the jobs maintenance process as you normally would.

PROPOSED WORK TYPE ESTIMATE

If you chose **Proposed Work** as the initial **Type** for your estimate then instead of becoming a job your accepted quote will transfer through to the **Proposed Work Wizard** screen.



You will notice that your details from the estimate request have been transferred over and you can use these to progress your proposed work.

There is a separate training guide available for Proposed Works.

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).

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