CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

INSURANCE CLAIMS

TRAINING GUIDE

SEP 2019

Version 1.4

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INSURANCE CLAIMS

You get an intimation through from a client or from one of your inspectors whilst they're out at the Development to let you know that an issue has occurred which needs an insurance claim raised. The following guide will take you through the process of using CPL to process this claim, arrange any work required, and process payments and charges.

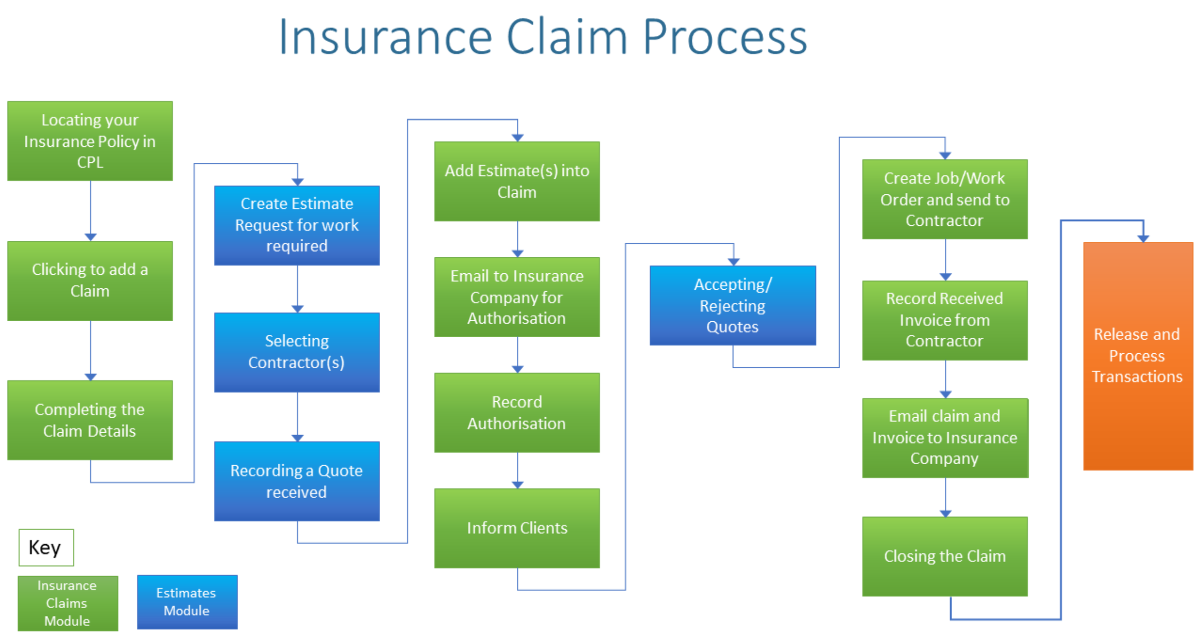
In order to process an Insurance Claim through CPL, you must have already added your Insurance Policy to the Insurance module. Please access the Training Guide, **Insurance Policies and Assigning** for information on how to do this.

CPL allows you to add the claim and the following Guide will take you through this process. You will also interact separately through the Estimate module for some information to pass through to the Insurance module. This will also be detailed in this Guide. The Insurance Claim process is very prescriptive with set tasks required along the way.

Below is a diagram representing the different steps in the process that will be covered in this Training Guide. Please note that the green process symbols represent the Insurance Claim Module and the blue process symbols represent the Estimates Module.

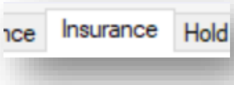
Please note, you can choose to receive and accept estimates external to CPL and follow through the insurance claim process without coming out to follow the process in the Estimates screen.

The Insurance Claim process in CPL is set up to assume that one 'All Trades' or 'Insurance Re-Instatement' contractor is performing any work required.

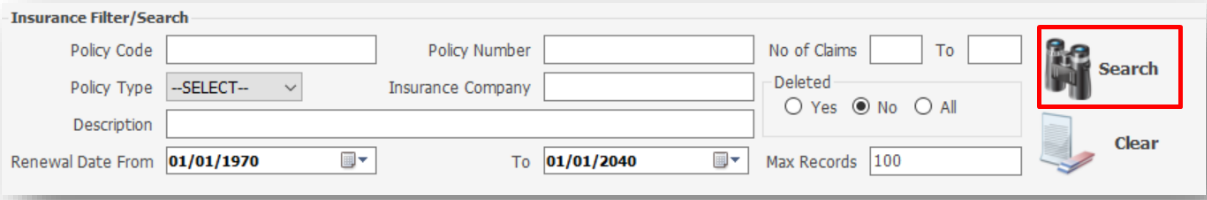


LOCATING YOUR INSURANCE POLICY IN CPL

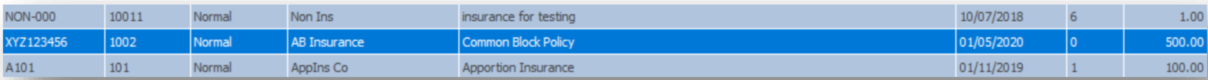
To begin your Insurance Claim, select the **Insurance Tab** from the main window in CPL.

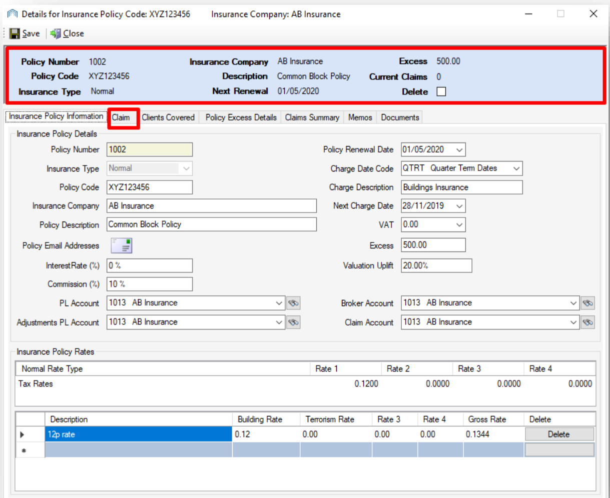


Use the **Insurance Filter/Search** options to find the correct Insurance Policy for your Development.



Once you have located the correct Policy in the Grid, double-click on this to open the details of this Policy in a new window.

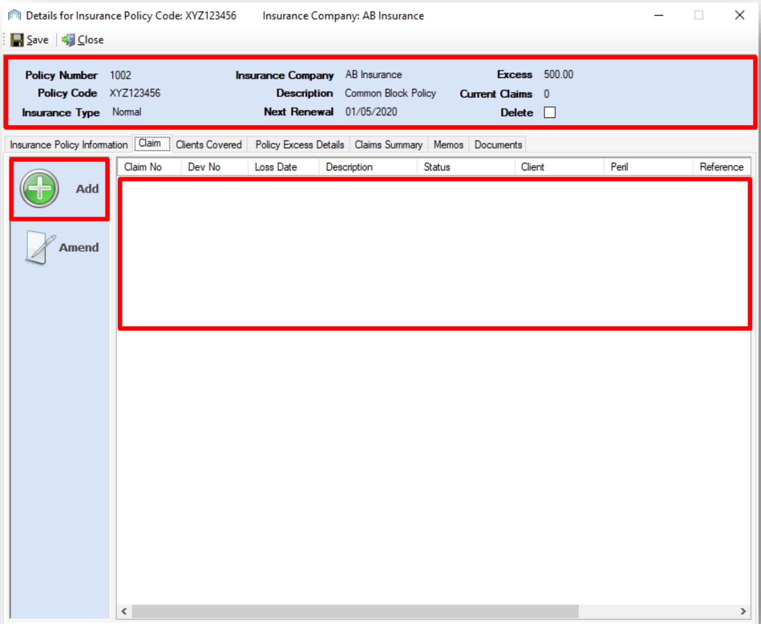




You will notice that the first tab in this new window contains all of the **Insurance Policy Information** which has been entered from your Policy into CPL. The second tab is the **Claim** tab.

Click on this **Claim** tab to begin your Claim.

The Claim tab will include a list in the grid area of any previous claims which have been made on this Policy. The grid will be blank if no previous Claims have been made.



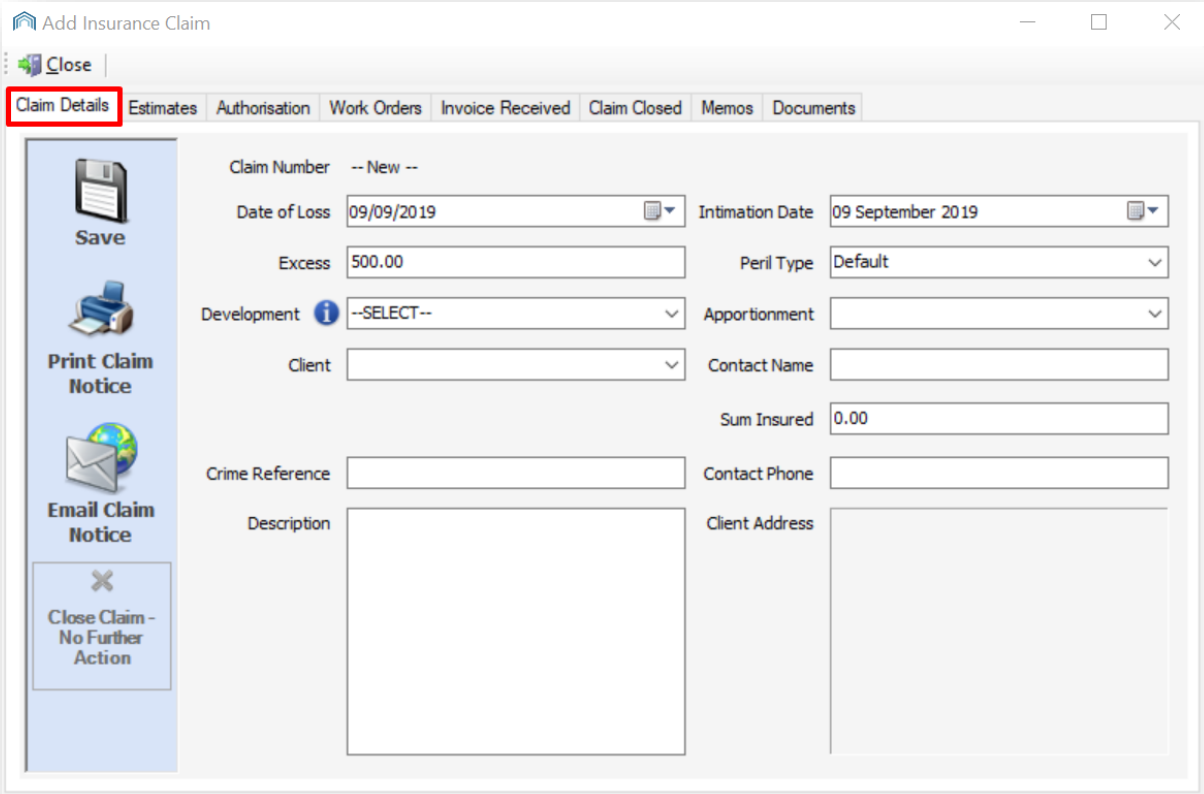
ADDING AN INSURANCE CLAIM AGAINST A POLICY

Adding a Claim is a very prescriptive process in CPL. It will lead you through a series of steps asking you to provide information at each stage.

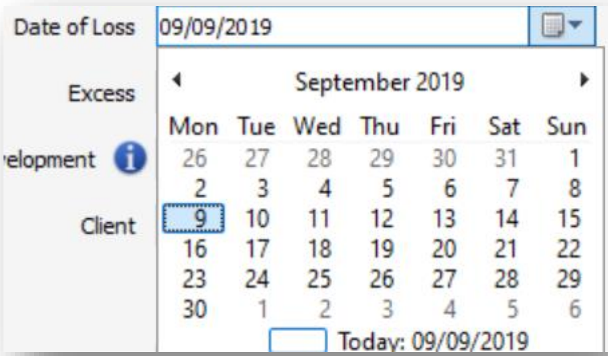
Click on the **Add** icon to begin adding the information for a Claim.

CLAIM DETAILS

This will open a new **Add Insurance Claim** screen beginning with the **Claim Details** tab.



In the **Date of Loss** field, use the calendar entry form to enter the date of the incident for which you are making a claim:



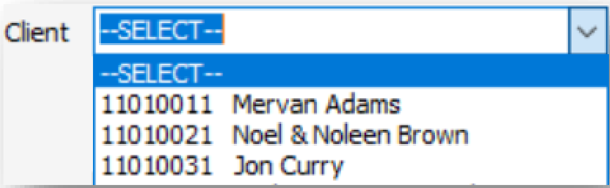
The **Excess** stipulated on your Policy will come forward into the next field. If the claim refers to a different type of peril that has a separate excess applied against it then you can edit the default amount in this field to reflect this.

An example of a common claim would perhaps be for the roof of a Block where all clients in the block would be paying part of the excess. Alternatively, you could be making a claim where an individual client has a broken window and this client would be solely responsible for paying the excess.

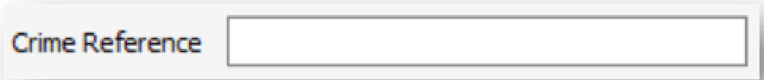
In the **Development** field, you are provided with a drop-down list of the Developments covered by this Insurance Policy. If no Developments appear in the drop-down list then you haven't assigned any developments against this policy.

The insurance claim you are making could either be a common claim across whole or part of a Development (involving multiple clients) or it could be a private claim (involving an individual client only). This first example would be covered by applying an Apportionment across all clients and the second by applying any charge to an individual client.

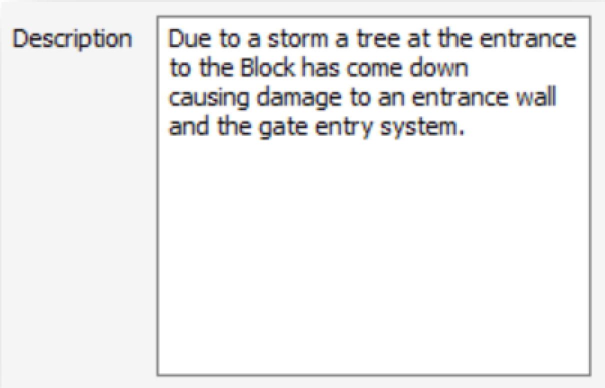
When you select a Development in the **Development** field, the relevant **Clients** and Apportionment will be populated, see below.



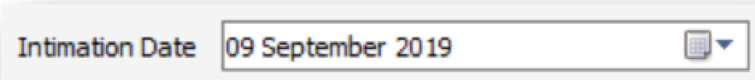
If you have a **Crime Reference** then please enter this into the field:



At the bottom of the left-hand column on the screen, enter an appropriate **Description** for the claim you are making.

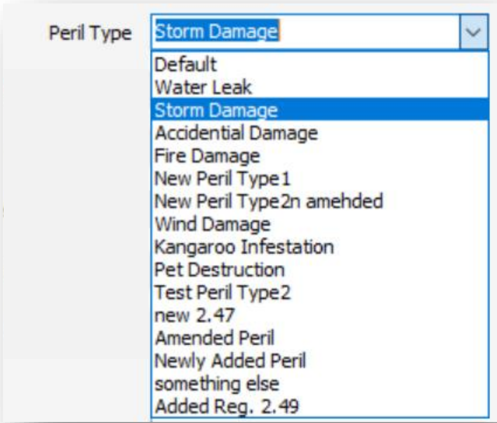


At the top of the right-hand column in the screen, the **Intimation Date** field will allow you to use the calendar option to record the date you are informing your Insurance Company.

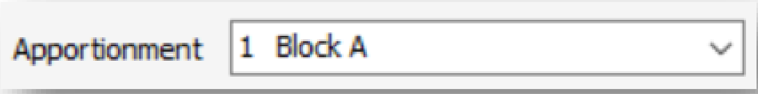


Select an appropriate **Peril Type** for your Claim from the drop-down list available.

*These Insurance **Peril Types** are set up under the **System Parameters** in the main CPL window.*



The next field available within the Claim screen enables you to select an **Apportionment** for your Claim. The **Client** and **Apportionment** fields are mutually exclusive, you may select one or the other. If you have an individual Client then select them under the **Client** field. If the Claim is for a whole Block or for part of a Block for which an Apportionment exists then you can choose this here. Selecting an **Apportionment** when you already have a **Client** selected will cancel your **Client** selection. You must select either an Apportionment or an individual client for your claim.



*Apportionments for Developments are set up under the **Development** tab in the main CPL window and are used to make sure the correct billing of Clients is possible within CPL.*

The **Contact Name** field will be automatically populated if you have chosen an individual Client. Otherwise, you could enter the name of a client who could be contacted when a company is onsite at the Development/ Block/ Property.

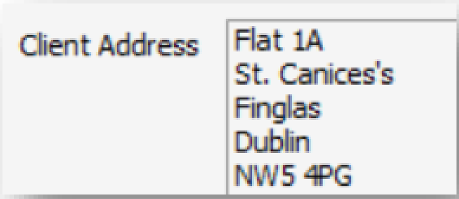
The following field will depend upon whether you have selected the whole Development or an individual Client. It will either be labelled as **Development Sum Insured** or alternatively as **Client Sum Insured**.

Sums insured are based on whether the unit in the building has its own sum insured or whether it is insured with the entire development. This is very important as it is determined by the insurance company.

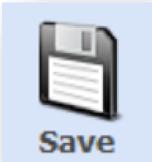
The sum insured shown will be determined by how you set up the Insurance policy for the Development, a Block and the individual properties within it.

If you have selected an individual Client for whom CPL has a **Contact Phone** number, this will be displayed in this field. If the claim concerns more than just an individual Client then you can enter a contact number manually:

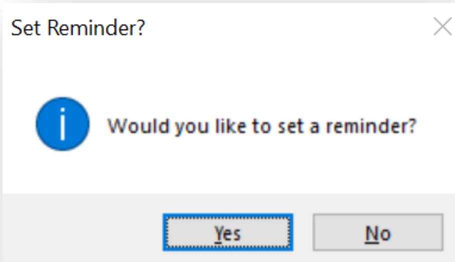
The **Client Address** field should be automatically pulled from the information held in CPL on the Development or on a specific Client if you have stipulated this on this screen:



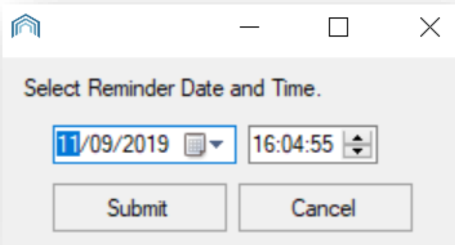
Once you have entered all information required into the available fields you can click on the **Save** icon in the **Action Panel**:



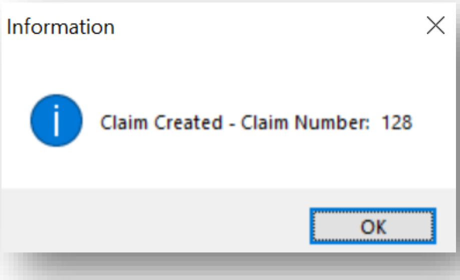
At this point, CPL will pop-up a window asking if you'd like to set a reminder.



This could be worthwhile if you need to come back to the Claim later. If you choose **Yes** then you will be offered an option to set a date and time for CPL to remind you to come back and continue with the Claim through a notification.



Once you've set your reminder or said **No** to this option then your claim will be saved and you will be given a **Claim Number**:



When you click on **OK** to acknowledge this you will notice you have been taken into the second tab of the **Add an Insurance Claim** screen titled **Estimates**.

You can return to the **Claim** tab if you need to, where the **Action Panel** also gives you options to **Print Claim Notice** and **Email Claim Notice** in order to let your insurance company know about the claim.

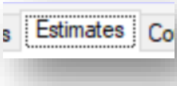
Before you can ask your insurance company to approve payment for any work required, you need to have asked for and received quotes from as many contractors as are needed to carry out each job.

You may be doing this externally to CPL and in this case, you can move directly to recording your Estimates in your Insurance Claim in the **Recording your Preferred Estimate in your Insurance Claim** section on page 21 of this Guide.

REQUESTING ESTIMATES

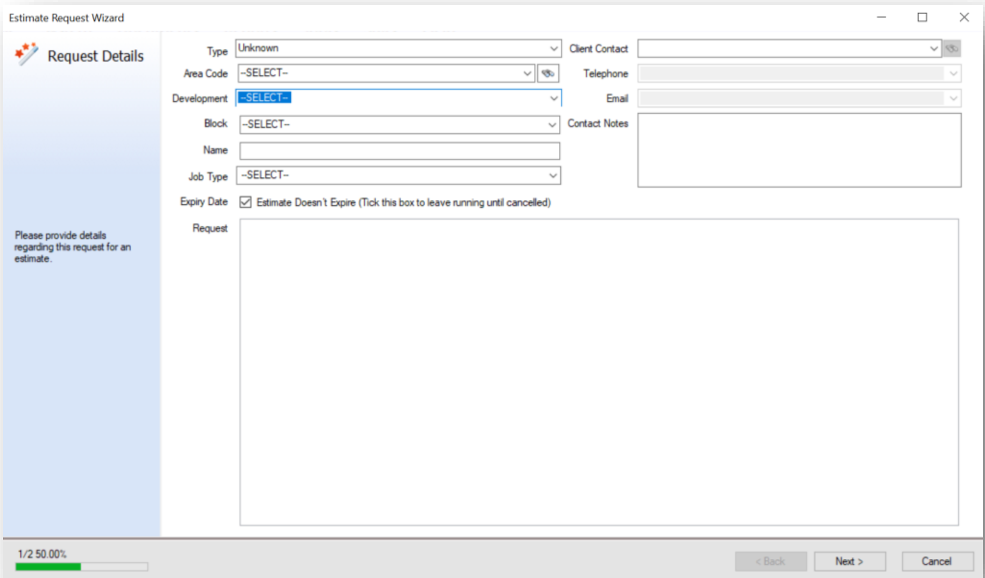
Different people use different phrases when talking about estimates. Some use Quotations, some use Estimates. CPL has been set up to use the word Estimate so please treat this as whatever you would normally refer to in your business.

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

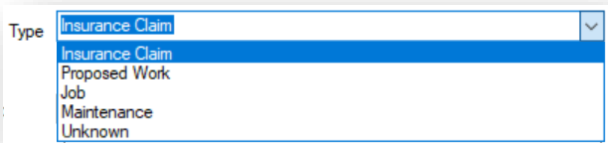


Select the **Add** icon in the blue highlighted Action Panel just below the middle of the screen.

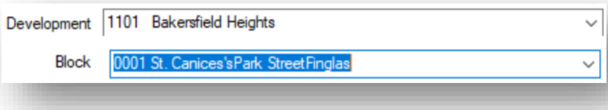
This will open the **Estimate Request Wizard** window which will guide you through the process of requesting the quotes. You may need to complete a separate Estimate Request for each Job required as part of your remedial works. This would be relevant if you plan to use multiple contractors. You may, of course, be using an ‘All Trades’ or ‘Insurance Reinstatement’ contractor whereby it is likely you will be using only one contractor.



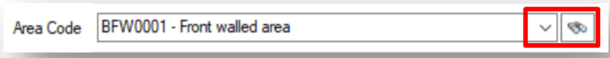
Select the appropriate **Type** from the drop-down list. This is a list of overall job types and in this instance, we will be selecting **Insurance Claim**:



Next, use the **Development** and **Block** drop-down menu to select the appropriate Development and Block (if appropriate) where the work is required to aid your Contractor:

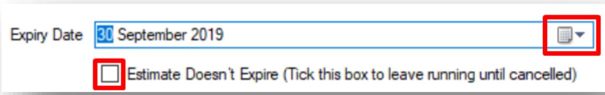


If you have the **Development Area Codes** module, you will notice there is an option to be even more specific for Contractors about where the work is required. You could select an Area Code from the drop-down menu or click on the search icon to explore tree structures for Area Codes you have set up. If you don't have the Development Area Codes module then you won't see the option here.



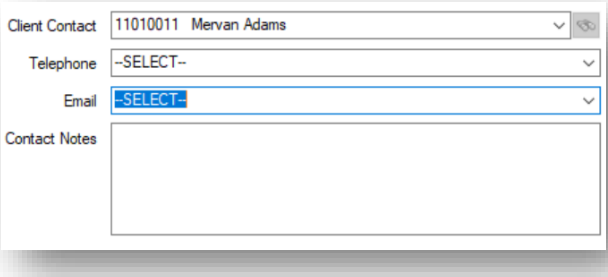
A Name for the Estimate Request can be entered in the following field. This will help you identify the job when you need to find it again in other parts of CPL so try to be succinct but descriptive.

If you would like to set a deadline for responses from contractors then enter a date into the **Expiry Date** field. If you do not want the quote to expire then place a tick in the checkbox below the drop-down list.

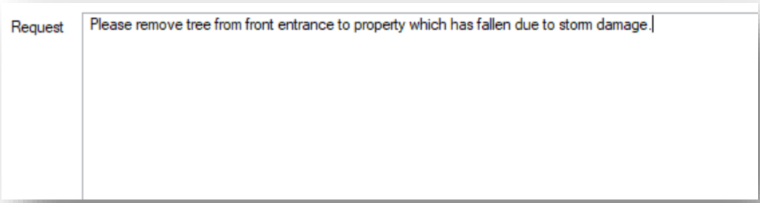


If appropriate, you can select a **Client Contact** on-site for the Development. The list is dependent on what you chose for the **Development** and **Block** fields on the left. Alternatively, use the search icon to find Clients associated with the Development/ Block. If you have selected a **Client Contact**, the **Telephone** and **Email** fields will allow you to select from the contact information held on this Client.

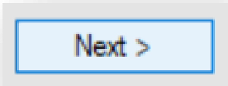
In addition, there is a **Contact Notes** box where you can leave specific instructions for Contractors. You may wish to leave details such as "Only Available between the hours of…" or "works from home and may be available during the day."



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.



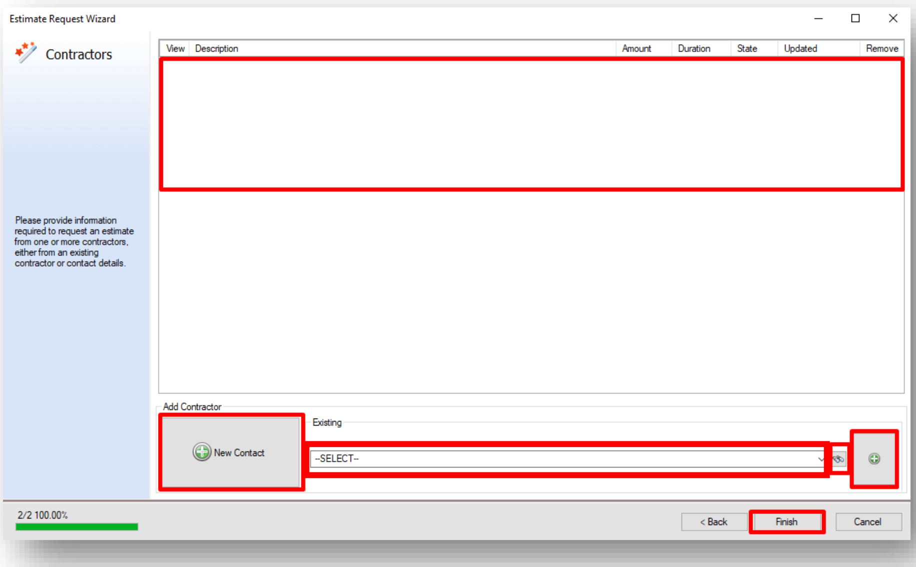
When you have completed this, click on the **Next** box towards the bottom right-hand corner of the screen.



SELECTING CONTRACTORS

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.

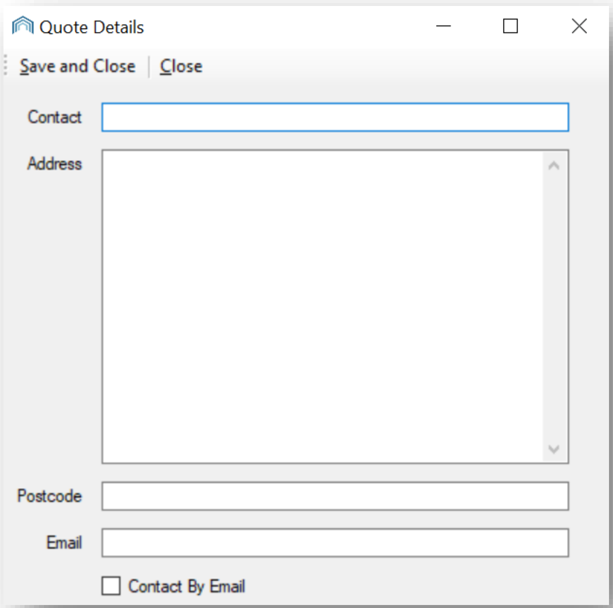
The screen comprises an upper area, or grid where Contractors will be listed once you add them and a lower area, labelled **Add Contractor** which allows you to choose how you will add Contractors.



Select the drop-down menu in the box labelled **Existing** for contractors who you have 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. This will open a new **Quote Details** window for you to add their contact details:



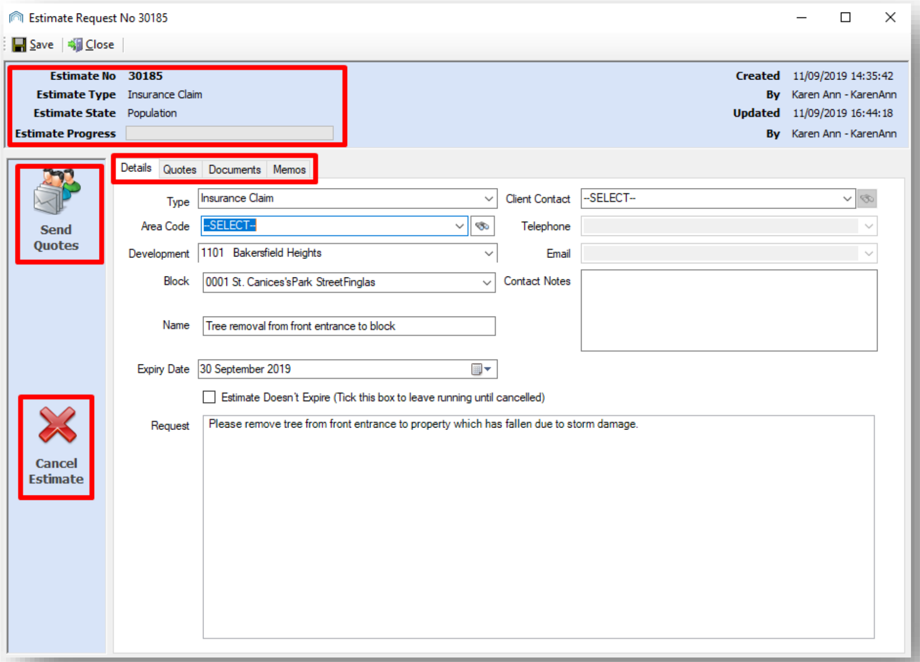
Enter the new Contractor's details into the fields in this window (choosing whether you would like to contact them by email by selecting the checkbox) and click **Save and Close** in the top left when you have finished. This new Contractor will be added to the grid in the top of the **Estimate Request Wizard** screen

It is worth noting that adding contact details using this method will not create a Purchase Ledger entry for the Contractor. If you decide to accept their quote, you will need to set up a PL account for them.

Once all Contractors you would like to receive quotes from are listed in the grid on this screen, click on the **Finish** button.

SENDING YOUR REQUEST FOR QUOTES

You will be taken to a new **Estimate Request No #** where you will see the information you previously entered in the **Details** tab and you will notice there are additional tabs for **Quotes, Documents** and **Memos**.

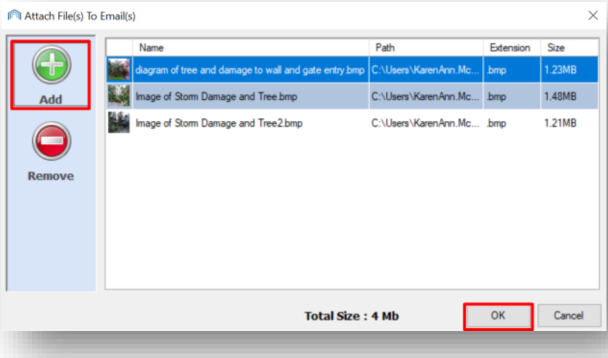


Take a moment to review the information you are sending to your contractors and make any changes required in this window.

If you are happy with the information click on the **Send Quotes** icon which will send your request for quotes to the contractors.

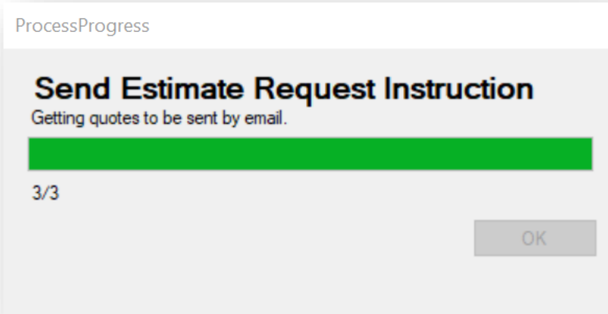
ATTACHING FILES TO REQUEST FOR QUOTES

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 produce their quotes. For example, images of damage or where a repair is required.



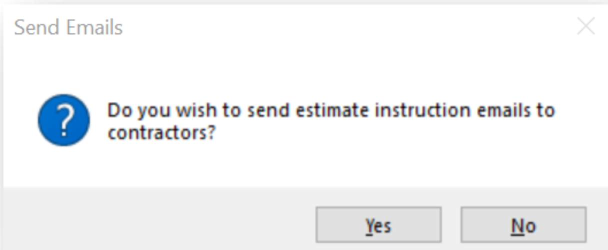
To add any files, click on the **Add** button and then browse for your files on your device. (On a Windows device these are usually added by clicking on **Open** in the file browser window). Once the files appear in the list, click on the **OK** button in the window to attach them to the email to the contractors. If you don't wish to attach any files then you could click on the **Cancel** button instead.

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



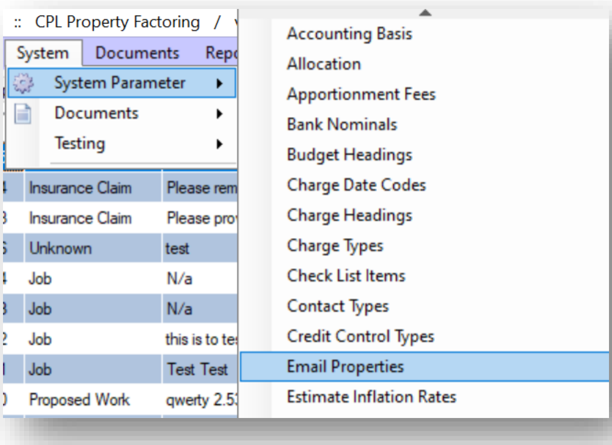
You will also see a screen asking if you would like to set a reminder on the system to enable you to check back and chase any Contractors for quotes you have not received.

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.

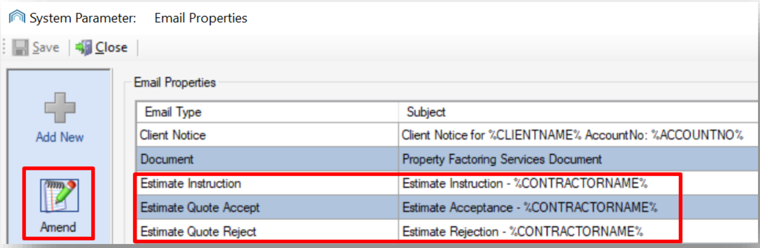


ESTIMATE REQUEST EMAIL TEMPLATE

Your requests will be sent using the email template which is set up in CPL for you by default. If you wish to edit this template you can do so by accessing **System** at the top of your main CPL window and then going to **System Parameter** and then selecting **Email Properties**:

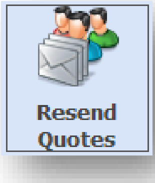


This will open an **Email Properties** window which will allow you to amend any of the Estimate Email Templates.



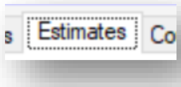
After your emails have been processed and sent by CPL, you will see a **Success** window telling you this and you can click on **OK** to dismiss this:

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.

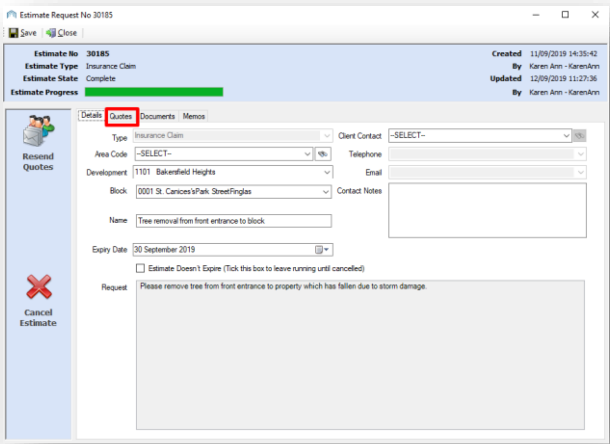


RECORDING A QUOTE RECEIVED

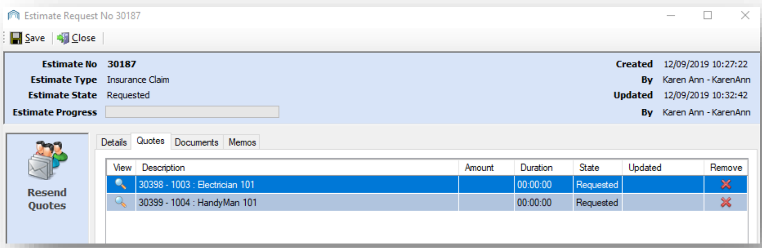
On receiving a Quote from a Contractor, you have the option to enter it against the Estimate entry in CPL. To do this, return to the **Estimates** tab in the main CPL window.



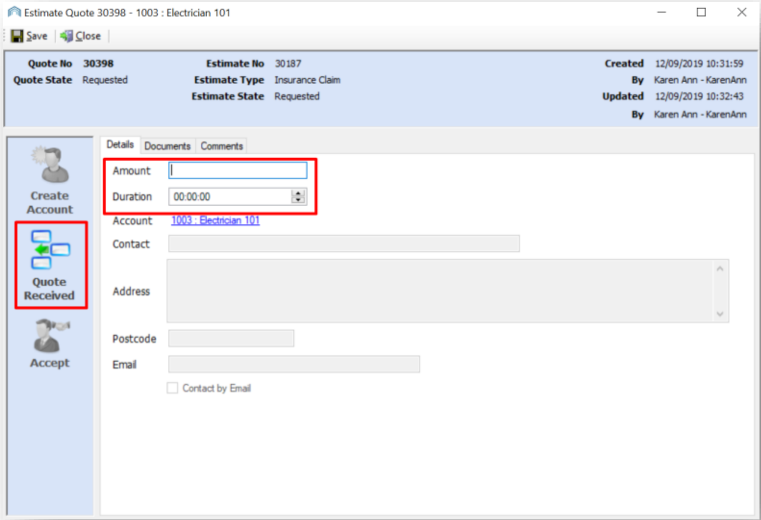
Your estimate will be listed in the grid. If you don't immediately see your Estimate then use the **Estimate/Filter Search** at the bottom of the screen to find it. Double-click your Estimate in the grid to open this in a new window.



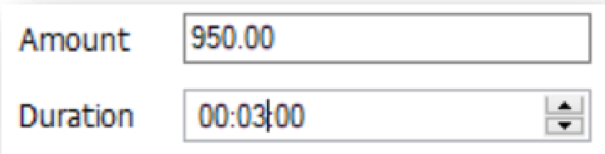
Click on the **Quotes** tab and then select the contractor you received the quote from by double-clicking the correct line.



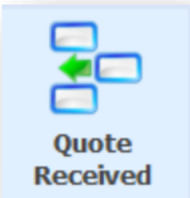
This will open the details window for the quote from that contractor.



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



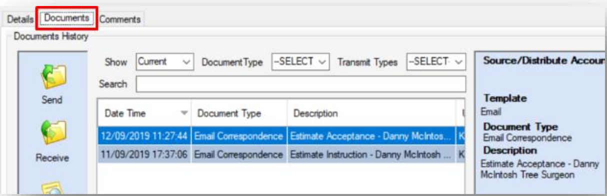
Once all details are entered click the **Quote Received** icon in the **Action Panel** on the left of the window.



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

You won't accept any quotes at this point as you will want to wait until you have received authorisation from your insurance company unless your policy allows you to have 'delegated authority'.

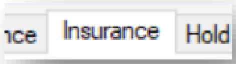
You will note that in the **Documents** tab there is a record of email correspondence with the contractors:



RECORDING YOUR PREFERRED ESTIMATE IN YOUR INSURANCE CLAIM

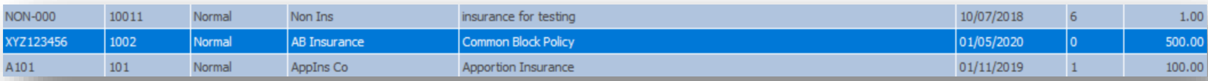
Now that you have received an estimate for the work which needs to be carried out, you can add this into your Insurance Claim. You may be required by your insurance company to add all estimates you have sought out for each job or you may only have to submit one estimate for each job. In this example, we will add a single estimate for the work we need done.

To add your estimate, you need to return to the **Insurance** tab in the main CPL window.

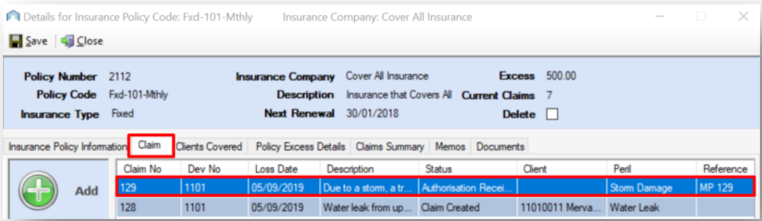


Use the **Insurance Filter/Search** options to find the correct insurance policy for your Development.

Once you have located the correct policy in the grid, double-click on this to open the details in a new window.

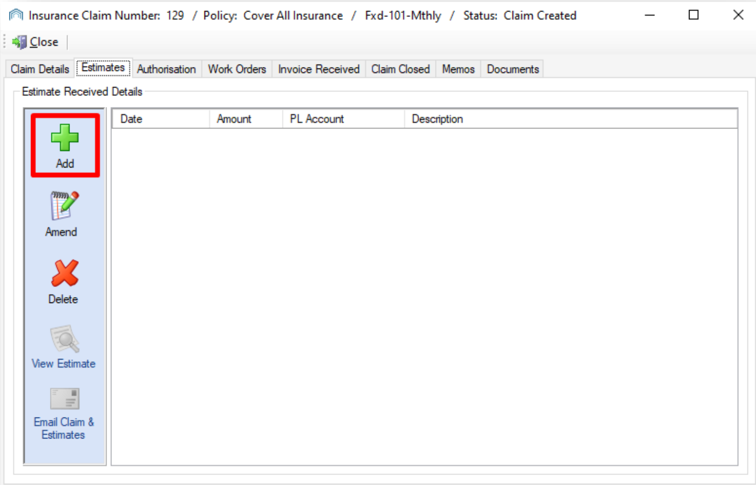


Once the **Details for Insurance Policy** window has opened, click on the **Claim** tab and double-click to open the Claim you had previously started:

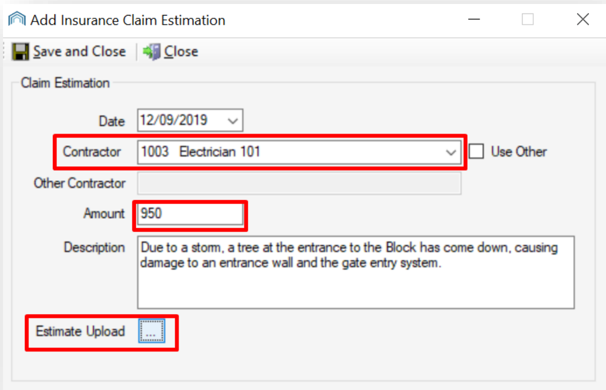


When the **Insurance Claim** window opens, bypass the **Claim Details** tab and click to open the **Estimates** tab.

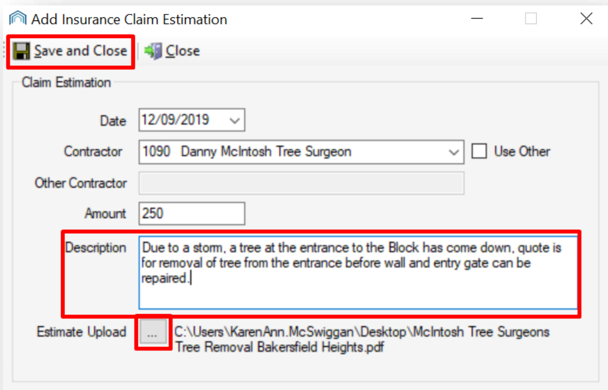
Click on the **Add** icon in the left-hand blue **Action Panel** to begin adding your Estimate(s).



This will open the **Add Insurance Claim Estimation** window:



You will need to have the details of your Estimate to hand or have the Estimate opened within another tab in CPL.



Fill in the **Date** you received the Estimate.

If you click on the drop-down arrow in the **Contractor** field you will see a list of contractors you have already set up in CPL. If you wish to add a new contractor click in the **User Other** checkbox.

It is worth noting that adding a Contractor using this method will not create a Purchase Ledger entry for the Contractor. If you decide to have this Contractor carry out your work, you will need to set up a PL account for them in CPL.

Fill in the **Amount** they are proposing to charge and a description for the work they will carry out.

The last task on this screen is to upload the Estimate document you received from this contractor by clicking on the grey box next to **Estimate Upload**. You will be able to browse for the file on your device and upload this to CPL.

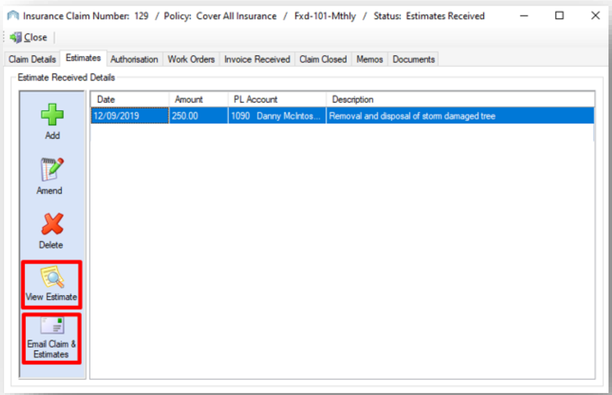
When you have added all information and selected the correct estimate to upload, click on **Save and Close**.

You will find yourself back on the **Insurance Claim** window on the **Estimates** tab.

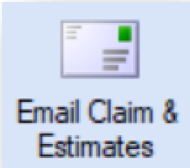
Repeat this process by clicking on **Add** to add any other Estimates you wish to add as part of this insurance claim.

You can record information from estimates you have received externally through this same process on the Insurance Claim screen.

If you return to this screen once your Estimate has been added, you have the option to **View Estimate** you have uploaded again. You can also highlight an Estimate and click on the **Amend** icon to make changes.

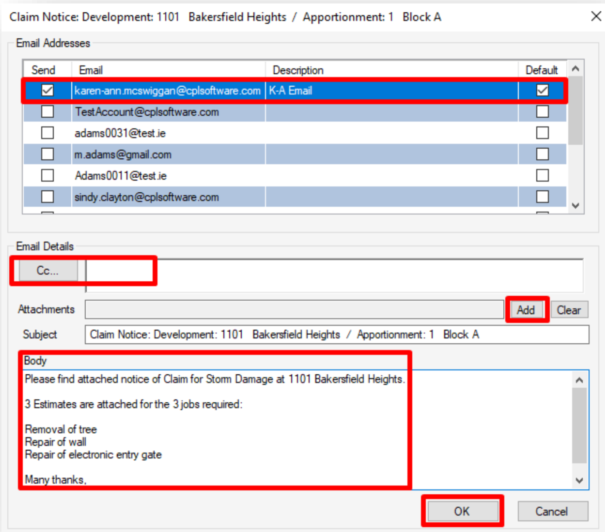


Having completed this, you are ready to move forward to emailing your claim and any estimates you have uploaded, to your insurance company by clicking on the **Email Claim & Estimates** icon:

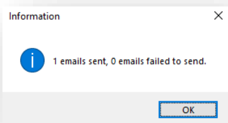


CPL will then pop-up a window showing you the **Email Addresses and Email Details** set up for your insurance company and you can review these to check which address you would like it to be emailed to. You can also choose to **Cc** someone from your own company as appropriate.

You have the option to edit the Email Subject Line and add your Body text for the email. Additionally, you have the option to add any other attachments which might be appropriate, for example, photographs of the damage you are claiming for.



When you have entered all the information you wish to, click on **OK** to send your email and estimates. You will receive confirmation when your email has been successfully sent.



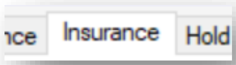
Click on **OK** to dismiss this pop-up. At this point, you can close the Email window with the cross in the top-right of the window.

INSURANCE CLAIM AUTHORISATION

If you are recognised as having 'delegated authority' by your insurance company, this may allow you to process claims up to a certain amount. This would be listed in the terms of your Policy. In this case, you can continue with the Insurance Claim process without waiting for authorisation. Otherwise, you will need authorisation from your Insurance Company in order to proceed with the work you have asked your contactors to quote for. If your insurance company has expected you to submit several different quotes for each job then they may stipulate which quote you should move forward with on your authorisation.

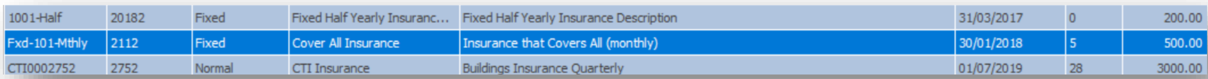
Once you have received authorisation through from your insurance company you should record this in the Insurance Claim in CPL.

To add your Authorisation, you need to return to the **Insurance** tab in the main CPL window.

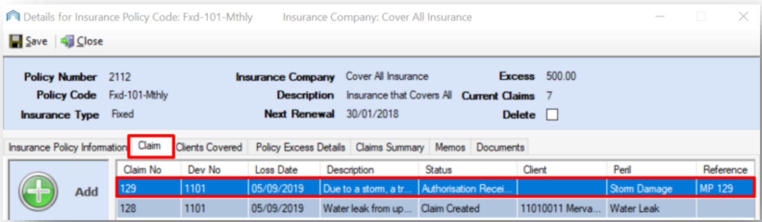


Use the **Insurance Filter/Search** options to find the correct insurance policy for your Development.

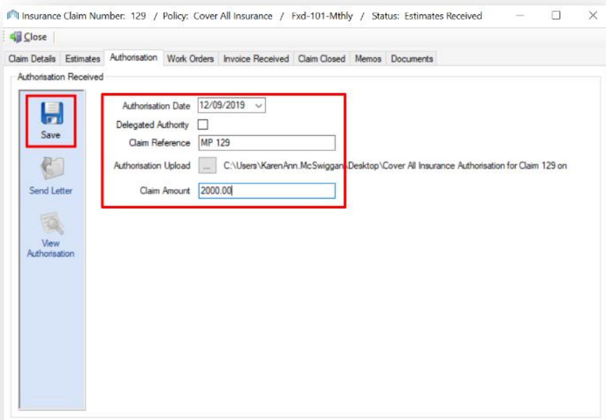
Once you have located the correct policy in the grid, double-click this to open the details of this policy in a new window.



Once the **Details for Insurance Policy** window has opened, click on the **Claim** tab and double-click to open the Claim for which you had previously emailed the claim and estimates:



When the **Insurance Claim** window opens, bypass the **Claim Details** and **Estimates** tabs and click to open the **Authorisation** tab.



Enter the date you received this authorisation or when you are exercising your delegated authority.

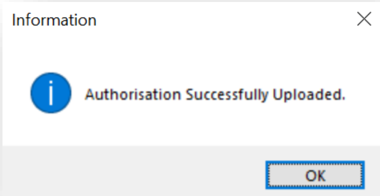
If you do have **Delegated Authority** then tick the box on this screen.

Add a **Claim Reference**.

You will be required to upload an Authorisation document from your insurance company or confirmation that you do have Delegated Authority.

Add the **Claim Amount** to the appropriate field. This is the amount your insurance company is willing to pay out and may not be the same amount as you have claimed for.

When you have finished adding your information, click on the **Save** icon.



You will see a pop-up window telling you that your **Authorisation Successfully Uploaded**.

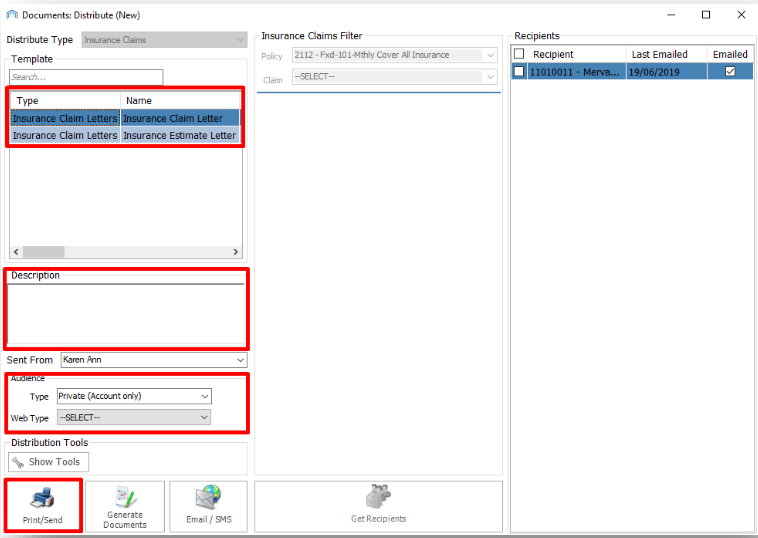
At this point, you can click on the **Send Letter** icon if you wish, in order to inform your Clients.

SENDING A LETTER TO YOUR CLIENTS

You can inform your clients that you have received authorisation from the insurance company to move forward with any repair works.

From the **Authorisation** tab within your Insurance Claim in CPL click on the **Send Letter** icon.

This will open a **Documents: Distribute** window which you may be familiar with from other areas within CPL where you get the option to send documents.



You can select from the **Type** of document you are sending.

Make sure you give the document a succinct but detailed enough description in order for you to identify it later.

In the **Audience** section of the window, you will get an opportunity to decide on the intended recipients of the document. If you choose **Private (Account Only)** then this is only going to an individual client. If you had chosen an **Apportionment** on the Claim Details tab then you would see a list of clients for the Block/Development in the **Recipients** section.

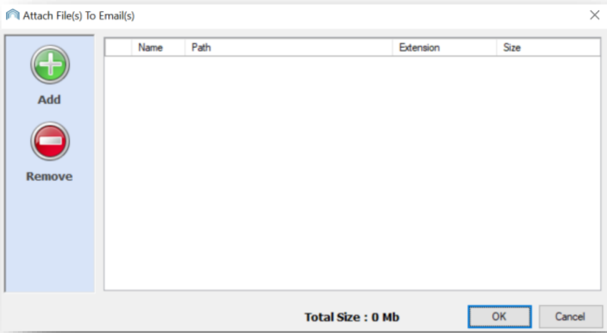
Web Type is only relevant if you are using the CPL Client Portal.

The **Insurance Claims Filter** information in the middle of the screen will be brought over automatically for the appropriate policy.

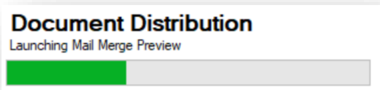
In the **Recipients** section on the right of the screen, you will be able to select **All** or individual clients and if a tick appears in the **Emailed** column you will see that they are set up to be contacted by email. If they are not you can print the document to send to these clients.

You should choose to click on **Print/Send** as your option from this screen.

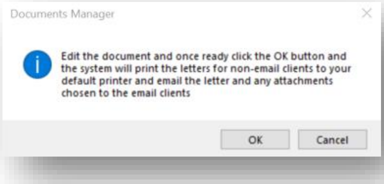
You will see an option asking if you would like to attach any files. Once you have done this, or would like to move on without doing it, click on **OK**.



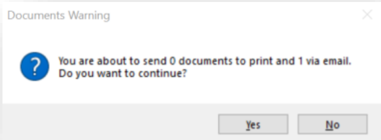
You will see the **Document Distribution, Launching Mail Merge Preview** progress bar on the screen.



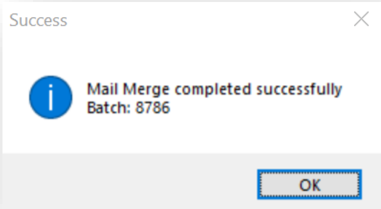
A **Documents Manager** pop-up window will appear letting you know you will be able to edit your document and that it will print copies for any non-email clients.



Once you have previewed your document and made any changes you require, you can click on **OK** and you will then see another pop-up window letting you know how many documents will be emailed and how many will be sent to the printer.



When you click on **Yes** you will see another pop-up window letting you know that your **Mail Merge completed successfully** and giving you a batch number.



Clicking **OK** on this window will dismiss the message and you can close the **Documents: Distribute** screen.

Having received Authorisation from your insurance company you are now ready to move onto instructing your contractor to carry out the job you have already received an Estimate for. Your insurance company may have stipulated which contractor they would like you to go with.

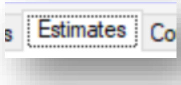
The next step is to create Work Orders to instruct your contractor to plan to carry out the job.

Before you do this, you may want to return to the Estimates module and accept the quote from the contractor you plan to go ahead with.

ESTIMATES - ACCEPTING A QUOTE

The following steps will have you move back to the Estimate module to let your contractor know that you are accepting their quote.

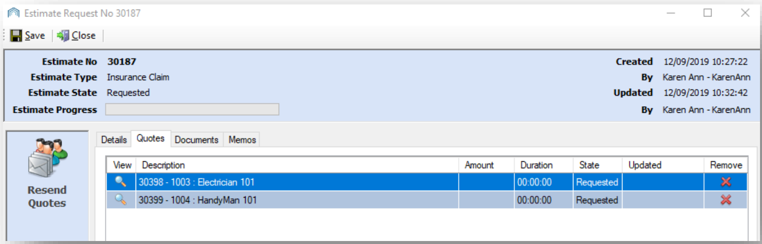
To accept a Quote, click to open the **Estimates** tab in the main CPL window.



Select the **Quotes** tab.

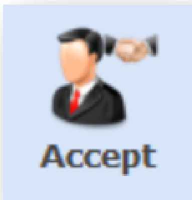
Your estimate will be listed in the grid. If you don't immediately see your Estimate then use the **Estimate/Filter Search** at the bottom of the screen to find it. Double-click your Estimate in the grid to open this in a new window.

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

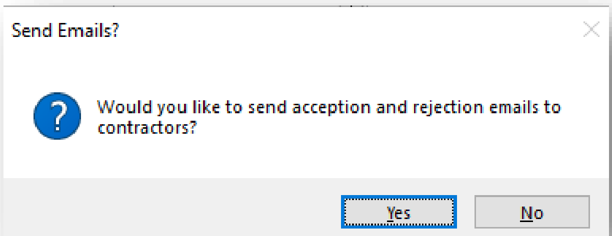


This will open the details window for the quote from that contractor.

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 acception 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. If you wish to edit these templates you can do so by accessing **System** at the top of your main CPL window and then going to **System Parameter** and then selecting **Email Properties**.*

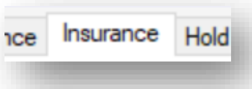
You can then close the **Estimate Quote** window.

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.

After accepting and rejecting quotes you will move back to the Insurance Claim to begin the Work Order process to give your contractor all the information they will need to complete the work required.

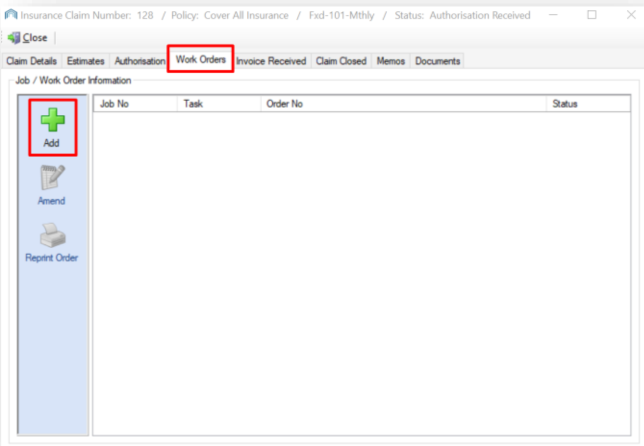
WORK ORDERS

To begin the Work Order process, you need to return to the **Insurance** tab in the main CPL window.



Use the **Insurance Filter/Search** options to find the correct insurance policy for your Development.

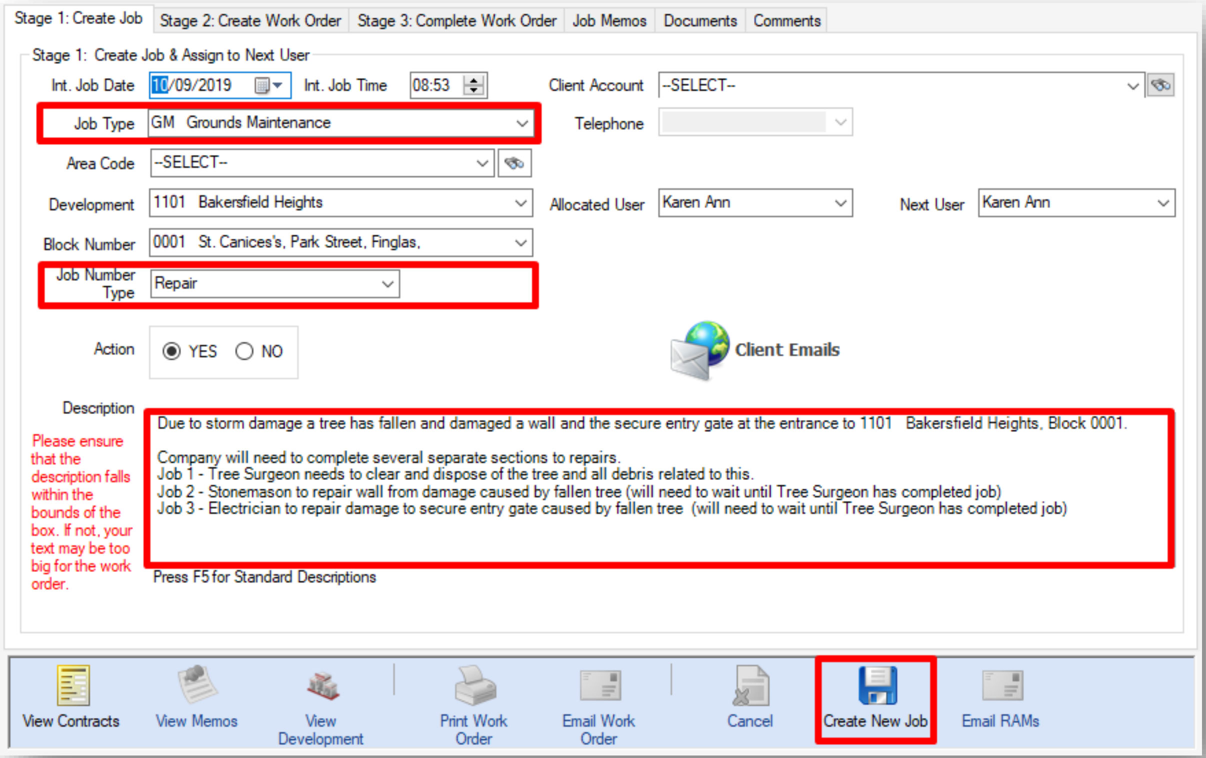
Once you have located the correct policy in the grid, double-click on this to open the details of this policy in a new window. Once the **Details for Insurance Policy** window has opened, click on the **Claim** tab and double-click to open the claim. When the **Insurance Claim** window opens, you will now be able to move directly to the **Work Orders** tab.



To begin to create a Work Order, click on the **Add** icon. This will open the **Jobs** screen that you may already be familiar with. You will see that the information from your Estimate (if you used the Estimate screens) has been automatically transferred over to this Jobs screen. If you didn't enter your Estimates through the Estimates module then you will enter the details at this point.

The Job entry can, from this point, also be found in the **Jobs Maintenance** tab, which is accessible from the main CPL screen, in addition to your Insurance Claim screen.

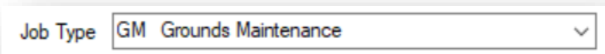
STAGE 1: CREATE JOB



This is your opportunity to check the details which have been brought over from the Estimates module (if you used this) before they officially become jobs. There are also some additional fields for you to complete in this screen.

By default, the date will be set for today's date. You should set the date and time for when the incident occurred causing you to raise the insurance claim.

Set the **Job Type** as relevant for the work required for your insurance claim. For our example, the work required is all external.



If you have the **Development Area Codes** module, you will notice there is an option to be even more specific for contractors about where the work is required, by selecting an Area Code from the drop-down menu or clicking on the search icon to explore tree structures for Area Codes you have set up. If you don't have the Development Area Codes module then you won't see the option here.

Make sure the **Development** and **Block Number** fields contain the correct information.

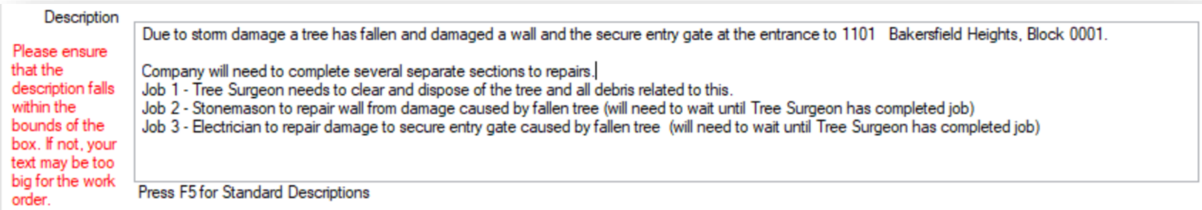
Under this is a field to select a **Job Number Type**. Select one appropriate to your needs.

Leave the **Action** as **Yes** to allow the Job to be commenced as soon as possible:

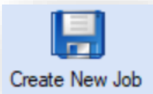
If the Job is external or involves the whole Block then you can leave the **Client Account** on the default **Select** option. Otherwise, you can use this to make sure you have the correct Client for the contractor to contact.

Under this is the **Allocated User** field, which you should see is set for your username, although you can adjust this if you are raising this job on behalf of another user in your company. The other field available is **Next User** where you can allocate the next stage of the process to be passed onto another person in your company. In this case, they will receive an alert through the notifications in CPL when the next section is due.

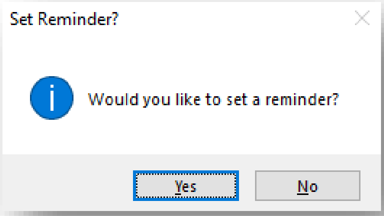
In the **Description** box, enter a succinct but specific description of the work required, including details which will help the Contractor carry out the work. In our example, we have 3 separate tasks which need to be carried out because of the storm damage. This description is the overall description for all works which are due to be carried out.



After you have checked over your information and completed all additional fields, you are ready to click on **Create New Job** in the **Action Panel** at the bottom of the screen.



CPL will now move you onto the second stage of the **Jobs Maintenance** process and you will be asked if you would like to set a reminder for the system to alert you to come back to this at a later date.

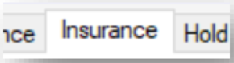


STAGE 2: CREATE WORK ORDER

Once you have clicked on **Yes** or **No** to the **Set Reminder** option you will see the **Stage 2: Create Work Order** screen.

If you exited the insurance claim screens at this point, you can locate the Work Order screen again by following the same steps as previously.

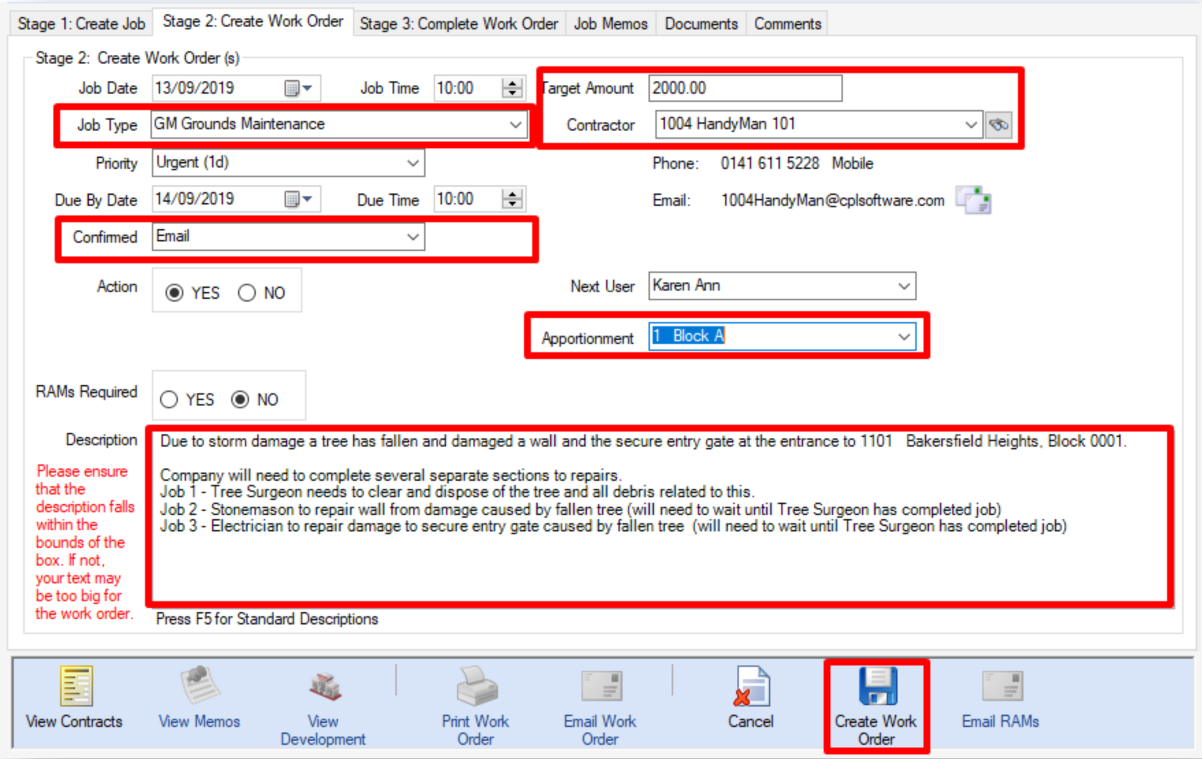
You need to return to the **Insurance** tab in the main CPL window.



Use the **Insurance Filter/Search** options to find the correct insurance policy for your Development.

Once you have located the correct policy in the grid, double-click on this to open the details of this policy in a new window. Once the **Details for Insurance Policy** window has opened, click on the **Claim** tab and double-click to open the claim for which you had previously emailed the claim and estimates. When the **Insurance Claim** window opens, you will now be able to move directly to the **Work Orders** tab. When you open this tab, you will see the Job you have created in the grid and you will be able to double-click on this to open up the **Work Order** screens.

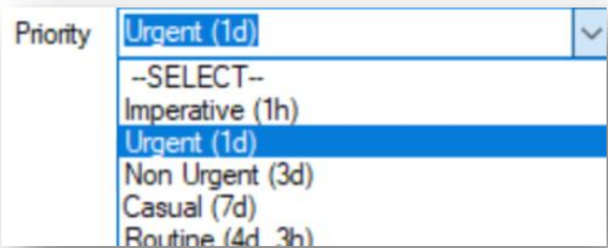
You should be on **Stage 2: Create Work Order**, having now created your Job.



You will see your information brought over from Stage 1 but we are now ready to move forward to creating **Work Orders** for our contractor and there is some additional information we need to provide. Our example for the insurance claim has three jobs which need to be carried out as part of the remedial work and we will explain each job the contractor will carry out.

Again, the date field will default to today's date but you should set this date for when you are instructing your contractor to move ahead and begin the work. This will link with the option you choose from the following **Priority** drop-down list.

We need to inform our Contractor which **Priority** we would like to set for the work to be carried out to let them plan when it needs to be done. Choose from the various options available depending upon your level of priority. This will give your contractor notice of the time you expect them to get to the work based on your date in the field before:



Use the **Due By Date** and **Due Time** as indicators for your Contractor on when the work needs to be completed.

Next, select how the Job has been **Confirmed** to the Contractor by selecting from the drop-down menu of options:

In the **RAMs Required** section you can select **Yes** or **No** to indicate to your contractor whether you require a Risk Assessment Method Statement document for the job.

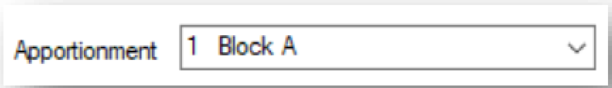
Enter a **Target Amount** for the work being undertaken. In our example, one company is going to carry out all 3 parts of the remedial work required as a result of the storm damage. The target amount will allow you to note what the contractor or your Property Manager think the cost of the job will be.

On this screen, you are also being asked to select the **Contractor** for this part of the works required.

You can either choose from the drop-down list of contractors approved for this Development or use the Search option to search for another contractor in the system. Once you have selected the contractor you will see the corresponding contact details for them listed below.

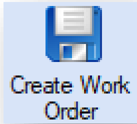
Should you wish, you can use the **Next User** field to pass the next stage of the process onto another User in your company. They will receive a notification in CPL to move forward with the next part of the process.

You also have an option to set an **Apportionment** for this Work Order to help you with billing your clients. The Property Manager can make sure this information is there as a guide for when this invoice is being charged out through accounts.

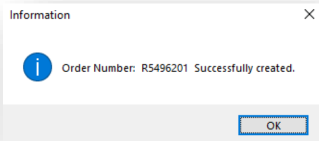


In the **Description** field, you should check that you are happy with your succinct but specific description of the work you wish to be carried out. In our example, as there are various pieces of work required, we have explained this in the original description and there is no need for us to change this in Stage 2 of the Work Order process.

Once you have completed all fields you wish to on this screen, click on the **Create Work Order** icon in the **Action Panel** at the bottom of the screen:

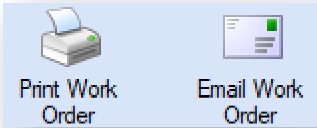


A pop-up window will appear with your **Order Number** and confirmation that your Work Order was successfully created. Click on **OK**:

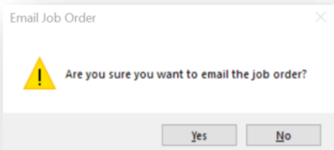


EMAILING/PRINTING WORK ORDERS

Once you have created your Work Order you have the option, in the **Action Panel** at the bottom of the screen, to print this and email it to the Contractor

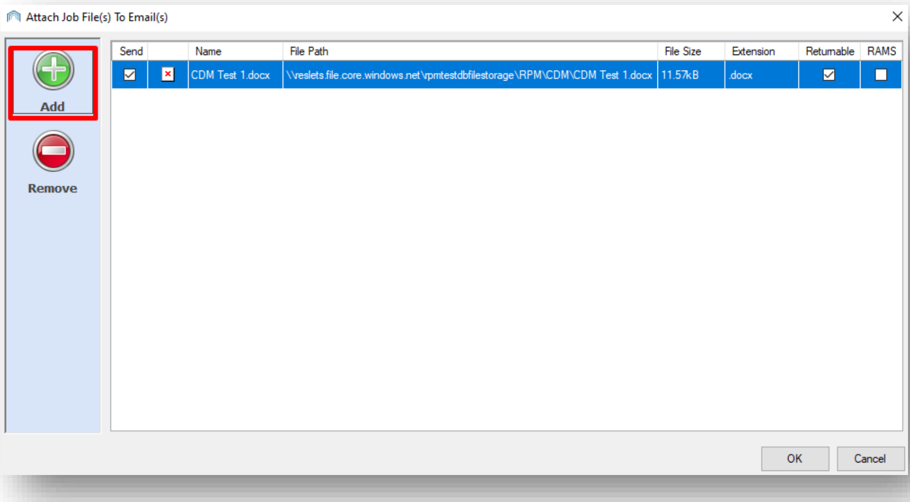


If you click on **Email Work Order** you will be presented with a pop-up window asking **Are you sure you want to email the job order?**



You will then see a screen offering you the option to **Attach Job File(s) to Email(s)**:

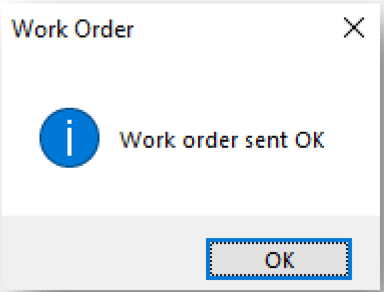
CPL SOFTWARE



This screen will give you the option to give your Contractor additional information they will require for carrying out the work. You may, for example, want to attach photographs of the damage or maps of the location.

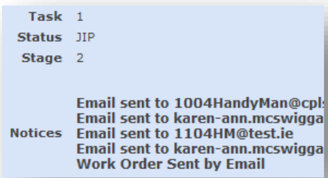
Once you have added any attachments click on **OK** and your email will be sent to the contractor.

You will see a pop-up window informing you that your Work Order has been sent and you can click on **OK** to dismiss this.



You will find that you are back on the **Stage 2: Create Work Order** screen.

In the top blue panel of your Jobs screen, you will see **Notices** informing you of any emails that have been sent out for this Work Order.

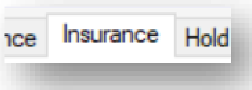


STAGE 3: COMPLETE WORK ORDER

Once your contractor has completed their job(s), you will need to let CPL know about this by using the **Stage 3: Complete Work Order** tab in the **Work Orders** section of your insurance claim. This process would follow the same path as any other Jobs process you are familiar with in CPL. The difference here is that you are updating the information in the **Work Order** section within your Insurance Claim. However, although you are completing it here, the information is accessible through the standard **Jobs Maintenance** tab in the CPL main window.

If you have exited the Claim, follow the same steps as previously to find it again.

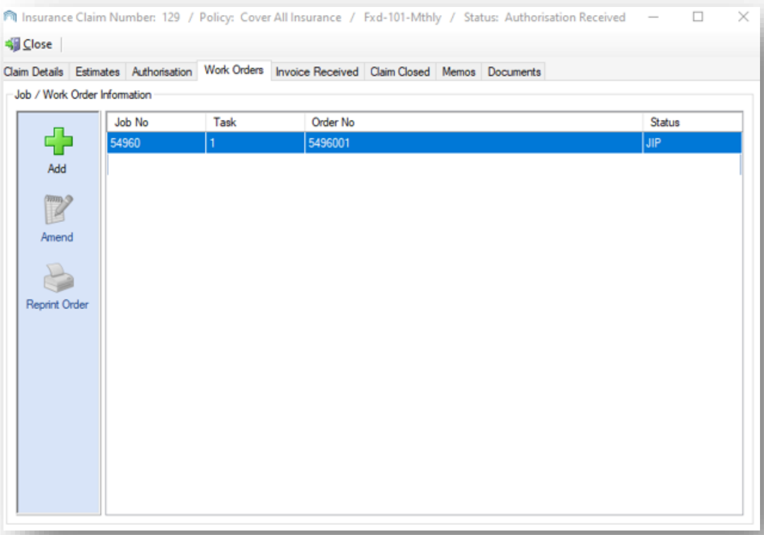
You need to return to the **Insurance** tab in the main CPL window.



Use the **Insurance Filter/Search** options to find the correct Insurance Policy for your Development.

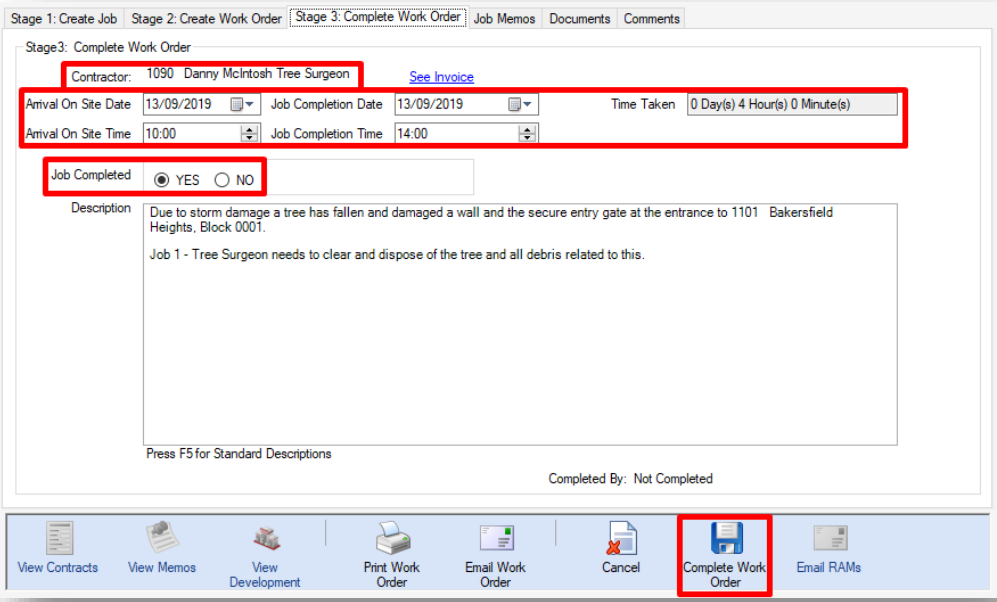
Once you have located the correct policy in the grid, double-click on this to open the details of this policy in a new window. Once the **Details for Insurance Policy** window has opened, click on the **Claim** tab and double-click to open the claim for which you had previously emailed the claim and estimates. When the **Insurance Claim** window opens, you will now be able to move directly to the **Work Orders** tab.

On the **Work Orders** tab, you will notice that the Work Order you have created is listed with the Job Number with a **Status** of **JIP** signifying that the job is in progress:



You have the option to **Amend** or **Reprint Order** for any of the work orders listed in this screen.

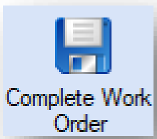
To record the completion of a Work Order, double-click on this icon in the **Work Order** tab of your Insurance Claim window and go to the **Stage 3: Complete Work Order** tab. You should find that the system takes you to this tab as you have already completed Stage 2: Create Work Order.



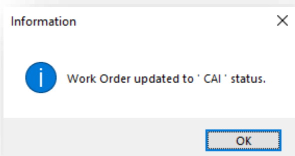
You will note that the Description for this Work Order has been brought over from the previous screens.

Record the details of the completed Job in each field on this screen, including the date, arrival time and duration of work and confirm that it is now completed.

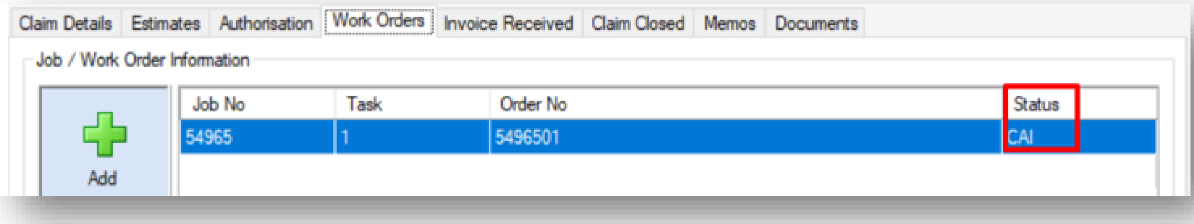
Once this is done click on the **Complete Work Order** icon in the blue **Action Panel** at the bottom of the screen:



You will see a pop-up window confirming that the Work Order has been updated to CAI, signifying that the Job is **Completed Awaiting Invoice**.



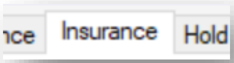
To do this, make your way to the **Work Orders** tab inside your Insurance Claim and repeat the above process for each Work Order. Once you have done this you will notice that the **Status** information will be updated:



RECORDING AN INVOICE RECEIVED

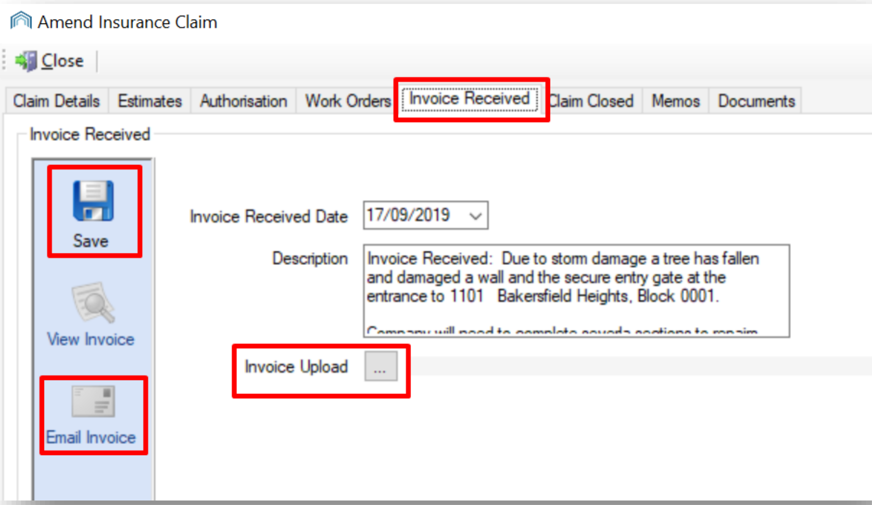
When you receive your invoice from your contractor you will need to record this in CPL. You may not be posting your invoice until you receive sums from the insurance company but you can record your receipt of it against your insurance claim.

When you receive your invoice, return to the **Insurance** tab in the main CPL window.



Use the **Insurance Filter/Search** options to find the correct Insurance Policy for your Development.

Once you have located the correct Policy in the grid, double-click on this to open the details of this policy in a new window. Once the **Details for Insurance Policy** window has opened, click on the **Claim** tab and double-click to open the Claim for which you had previously emailed the claim and estimates. When the **Insurance Claim** window opens, you will now be able to move directly to the **Invoice Received** tab.

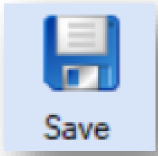


The **Invoice Received** tab (above) allows you to set the **date** you received the invoice.

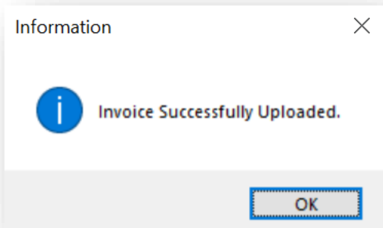
It will bring over the **Description** you set for the Work Order earlier in the process, but you can adjust this if you wish to.

There is an **Invoice Upload** button for you to use to browse your device and add the Invoice you have received from your contractor.

When you have set your date and uploaded your invoice, click on the **Save** icon in the **Action Panel** on the left:

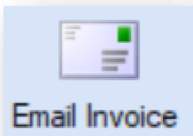


You will then see a pop-up window confirming that your invoice has been uploaded:



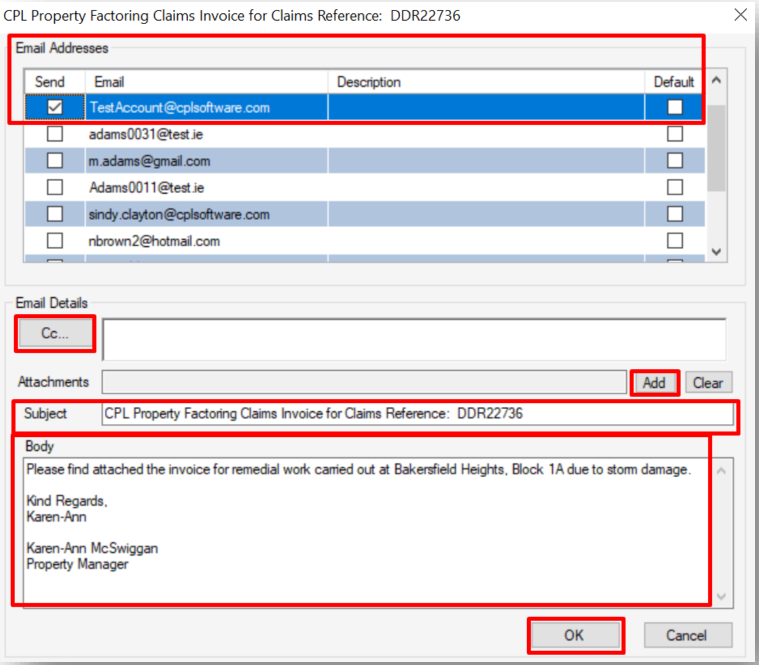
Click on **OK** to dismiss this.

Once you have registered receipt of your invoice you can email it to the insurance company using the **Email Invoice** icon in the **Action Panel:**

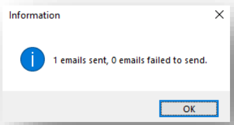


CPL will then pop-up a window showing you the **Email Addresses and Email Details** set up for your insurance company and you can review these to check which address you would like it to be emailed to. You can also choose to **Cc** someone from your own company as appropriate.

You have the option to edit the Email **Subject** and add your **Body** text for the email. Additionally, you have the option to add any other attachments which might be appropriate, for example, any relevant additional documentation or certificates.



When you have entered all the information you wish to, click on **OK** to send your email and any attachments. You will receive confirmation when your email has been successfully sent.



At this point you can click on **OK**. You can then close the Email window with the cross in the top-right of the window.

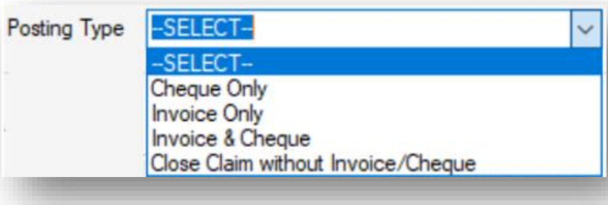
CLOSING THE CLAIM

When you receive the sum from your insurance company you are now ready to close the claim.

If you've received a cheque from your insurance company, it is likely to be for the sum they have agreed to pay minus the excess amount detailed on your policy.

The content of this **Claim Closed** tab is organised based on what you choose for the **Posting Type** at the top of the screen.

Clicking on the drop-down arrow in the **Posting Type** field gives you various options to select from.



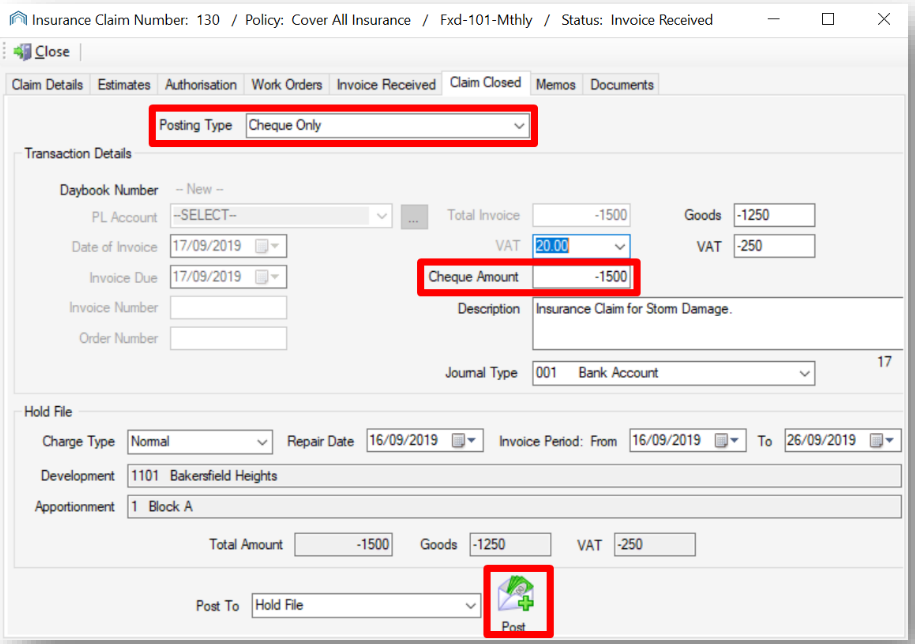
The following table shows what you would be posting and the situations where this might be the case:

Posting Type	**Invoice**	**Cheque**	**Scenario**
Cheque Only		✓	You may have already invoiced the client(s) and paid the Contractor and you are only posting the cheque received from your insurance company at this point.
Invoice Only	✓		You haven't received a cheque from the insurance company but you still want to charge your clients as the invoice is in from your Contractor.
Invoice and Cheque	✓	✓	You have received your cheque from the Insurance Company and you have received your Invoice from the Contractor but haven't paid this yet. We also haven't invoiced our clients for the Apportionment amount.
Close claim without invoice or cheque			Your insurer may have taken over the claim and they are dealing directly with the Contractor themselves or you may have posted any cheques and invoices outside of the insurance claim. In these examples, you may just want to close the claim at this point.

As you're working your way through the **Claim Closed** screen, the fields you enter information into will depend upon what you have selected as the **Posting Type**. Below is an explanation of how to make your way through closing the claim for each of the different posting types. Select the posting type appropriate to your needs for your insurance claim.

CHEQUE ONLY

If you're closing the claim by posting your cheque from the insurance company the fields regarding the cheque will be available. All fields regarding anything to do with the contractor's invoice will be greyed out.



The amount for the cheque from the insurance company, in this case, is £1,500 because this is the £2,000 for the claim, less the £500 excess on this policy.

In the **Cheque Amount** field, we are entering the amount on the cheque but with a minus, as it's a credit into the system.

You can add an appropriate **Description** into this field.

On the **Journal Type** choose where you are actually putting the cheque. In this example, it is being added to a bank account.

At the bottom of the screen for this example, we have chosen the **Hold File**, rather than the Charge File so that anything we post can be double-checked and reversed if required.

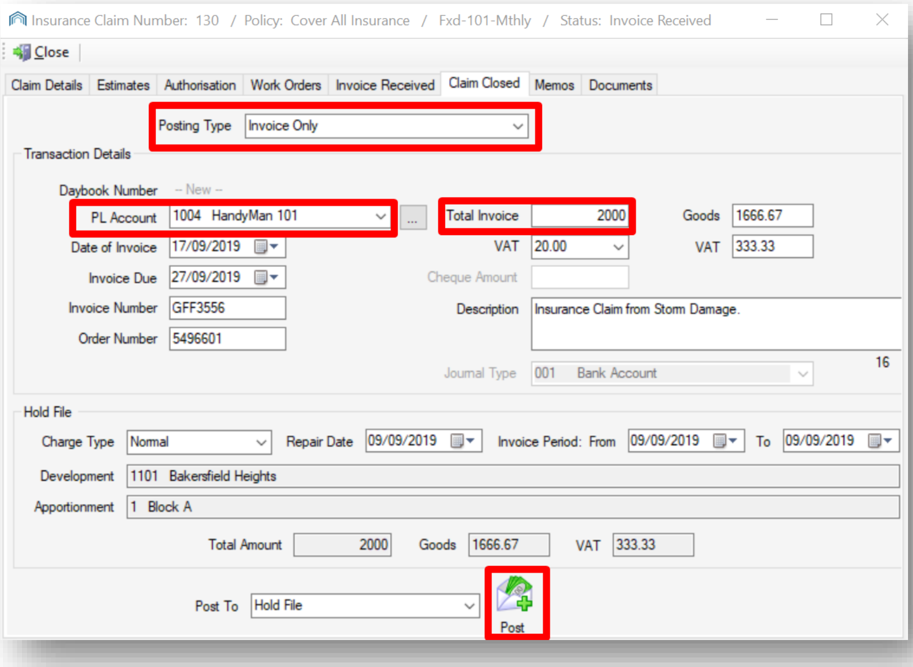
Select your **Charge Type** from the drop-down list and then select the dates for the **Repair** and the **Invoice Period**.

You can then click on the **Post** icon towards the bottom of the screen.

The cheque amount will then be credited against the Client **Apportionment** selected earlier in the process.

INVOICE ONLY

If you're closing the claim by posting your invoice only for the work done by the contractor, only the fields regarding this invoice will be available. All fields regarding anything to do with a cheque from the insurance company will be greyed out.



In the **PL Account** field select the appropriate contractor and add the **Total Invoice** and the **VAT** amount along with an appropriate **Description**.

Make sure you have the correct dates for your Invoice and your **Invoice Number** from your contractor along with your **Work Order** number for the Job. This can be found on the Work Order tab of the Insurance Claim.

At the bottom of the screen for this example, we have chosen the **Hold File**, rather than the Charge File so that anything we post can be double-checked and reversed if required.

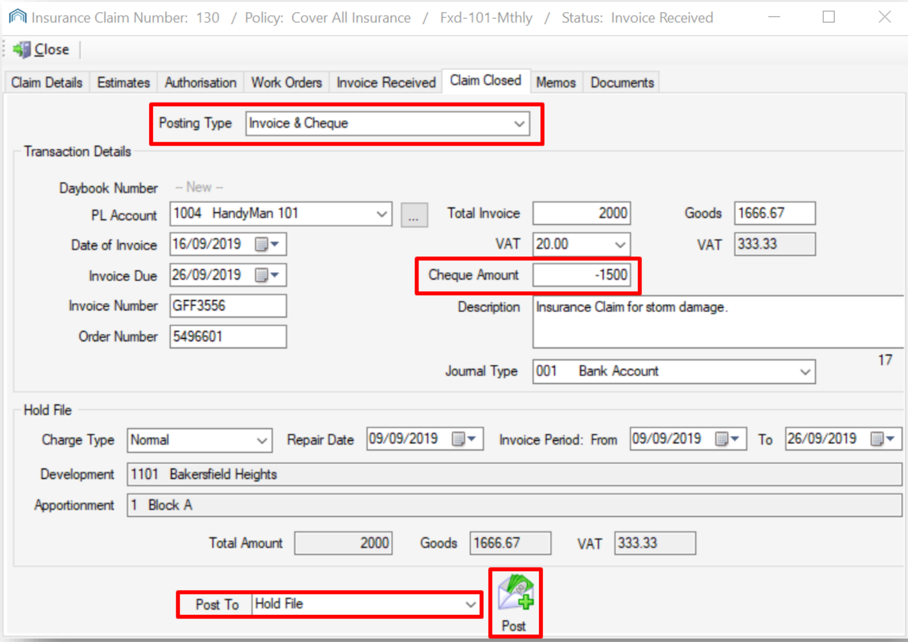
Select your **Charge Type** from the drop-down list and then make sure you have the correct dates for the **Repair** and the **Invoice Period**.

You can then click on the **Post** icon towards the bottom of the screen.

The invoice amount will then be charged out against the Client **Apportionment** selected earlier in the process.

INVOICE AND CHEQUE

If you're closing the claim by posting your invoice for the work done by the contractor and crediting your cheque from the insurance company the majority of the fields on the screen will require information. In this instance, only the fields relating to the **Apportionment** which was set earlier in the process will be greyed out.



The amount for the cheque from the insurance company in this case is £1,500 because this is the £2,000 for the claim, less the £500 excess on this policy.

In the **PL Account** field select the appropriate contractor.

Make sure you have the correct dates for your Invoice and your **Invoice Number** from your Contractor along with your **Work Order** number for the Job. This can be found on the Work Order tab of the Insurance Claim.

Add the **Total Invoice** and the **VAT** amount along with an appropriate **Description**.

On the **Journal Type** choose where you are actually putting the cheque. In this example, it is being added to a bank account.

At the bottom of the screen for this example, we have chosen the **Hold File**, rather than the Charge File so that anything we post can be double-checked and reversed if required.

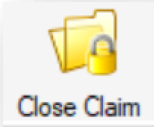
In the **Hold File** section, select your **Charge Type** from the drop-down list and then make sure you have the correct dates for the **Repair** and the **Invoice Period**.

You can then click on the **Post** icon towards the bottom of the screen.

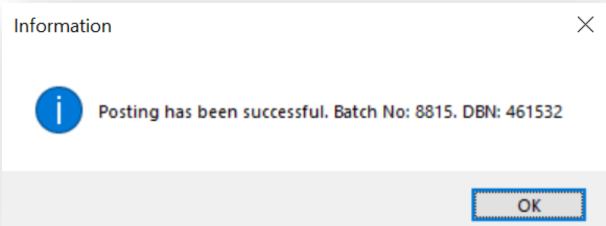
The invoice amount will then be charged out against the Client **Apportionment** selected earlier in the process and this will be offset by the cheque from the insurance company being credited to the clients.

CLOSE CLAIM WITHOUT INVOICE/CHEQUE

If there is nothing else you wish to do with the claim in terms of cheques or invoices you can close the claim without any other action. After choosing **Close Claim Without Invoice/Cheque** as your posting type, go to the bottom of the screen and click on the **Close Claim** icon towards the bottom of the screen:



Once you close the claim through these methods the insurance claim screen will close and you will receive a confirmation pop-up window giving you details about the Batch Number and Day Book Number of your posting.



Click on **OK** to dismiss this.

FOLLOWING UP YOUR TRANSACTIONS IN THE HOLD FILE, PURCHASE LEDGER AND CLIENT MODULES

If you select the **Hold File** tab in the main CPL screen you will see the transactions which have been posted in the grid. You will be able to release and process these transactions as you normally would.

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).