# CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

# JOBS MAINTENANCE

## TRAINING GUIDE

AUG 2020

Version 1.0

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# INTRODUCTION

The Jobs Maintenance module allows you to request jobs from any contractors you have set up as Purchase Ledger Accounts in CPL. It is a fully comprehensive module which links with various other modules within CPL. Aspects such as Estimates, Proposed Works, Insurance Claims, Warranties and Cyclical Maintenance will lead to jobs and can pull over information which you have already entered into the system.

Jobs Maintenance also integrates fully with the Blockworx system. Find out more about Blockworx at www.blockworx.co.uk
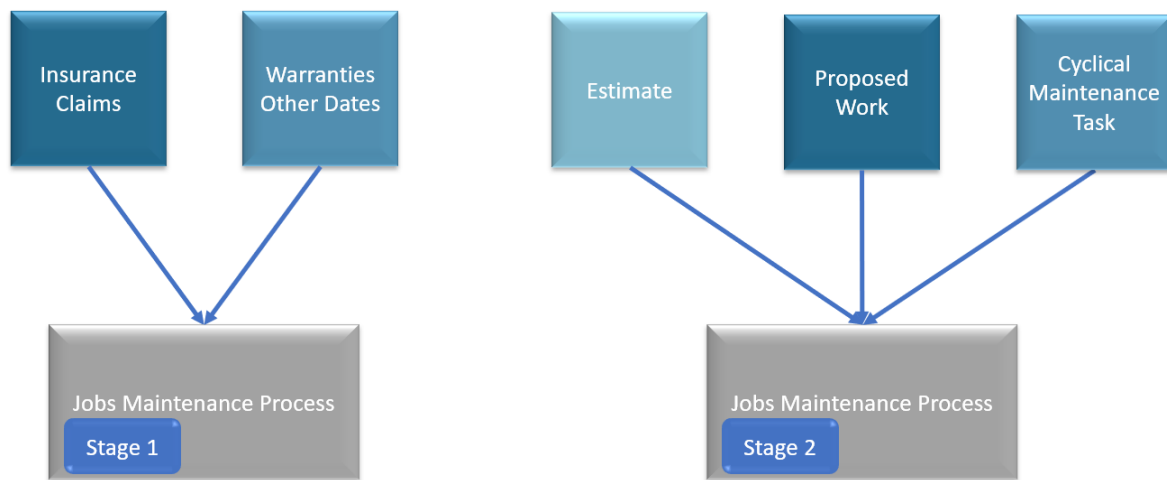


The module will take you through a step by step process, from entering basic details about a job you are requesting through sending a work order to your contractor, completing this once you have received your invoice and then using the order number to feed the information from your job through into the purchase ledger transactions screen and onto charges out to your clients on their invoices.

There are training guides available on each of the modules listed above which will explain how you get to the point of raising a job in CPL. This guide will assume you are not coming from one of these modules and heading straight to the Jobs Maintenance module itself to raise a job but the other guides will describe how they link with Jobs Maintenance.

The guide will also cover using the Jobs Maintenance module for requesting health and safety information in terms of RAMs (Risk Assessment and Method Statements) and CDM (Construction Design and Management) documents.

# RAISING A JOB IN CPL

To begin raising a job in CPL, click on the **Jobs Maintenance** tab in the main CPL window.
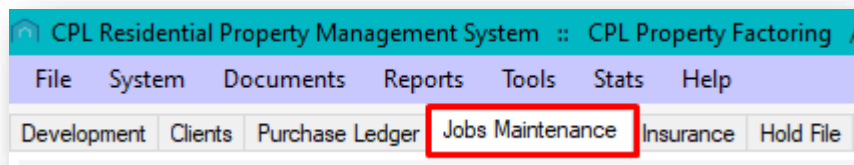


This will open the Jobs Maintenance screen in CPL.
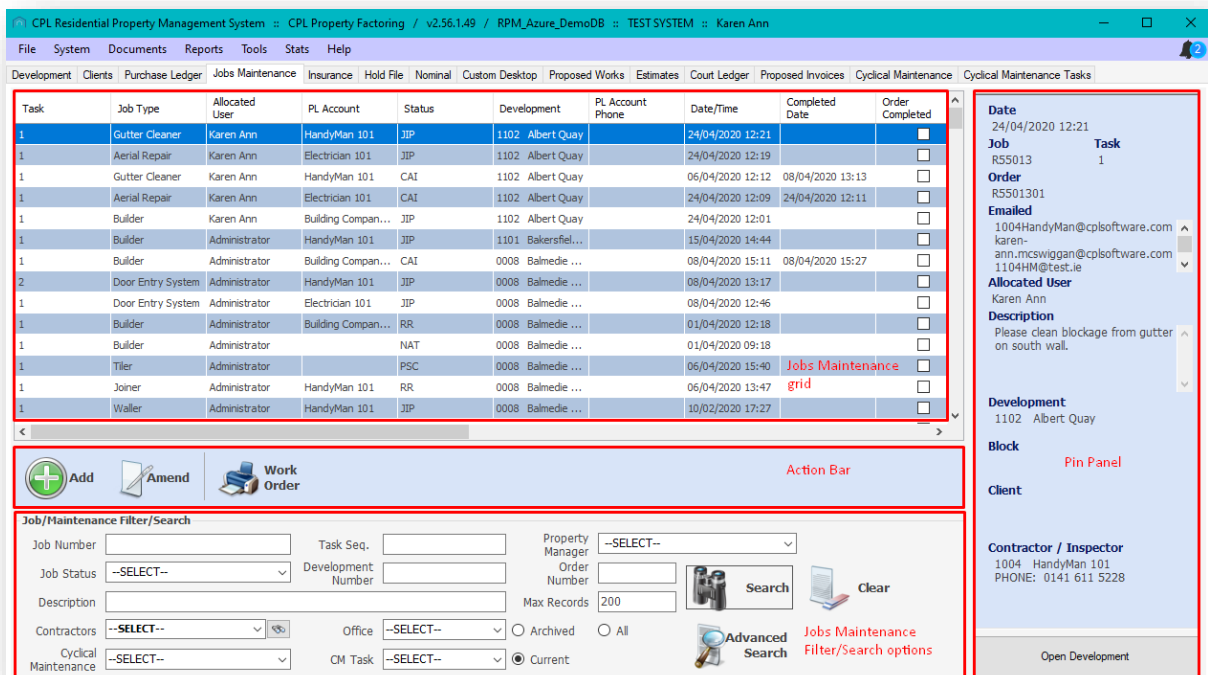


The Jobs Maintenance screen is made up of four main areas.

At the top, the largest area of the screen is taken up with the Jobs Maintenance **Grid** area. This will display a list of any individual jobs from a search which has been run.
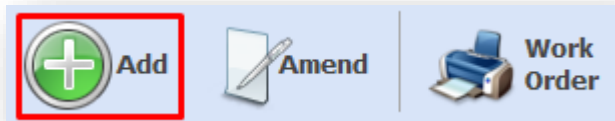
The bottom of the screen contains the **Job/Maintenance Filter/Search** area. This is similar to several other main module screens in CPL and contains various filters which can be set to help you locate an individual job.

The **Pin Panel** on the right of the screen will display a summary of information for whatever job is highlighted in the grid.

The **Action Bar** is the blue shaded area across the middle of the screen and offers various icons representing actions which can be performed, including adding a new job, amending an existing job and bulk printing or emailing work orders.

## STAGE 1: CREATE JOB

To get started with creating a job click on the **Add** icon in the **Action Bar** across the middle of the Jobs Maintenance screen.



This will open the **Add Jobs** screen at the **Stage 1: Create Job** tab.



This tab contains a number of fields which you can use to begin to tell the system about the job you are requesting to be carried out.
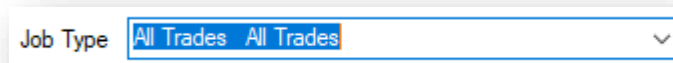
The first fields to fill in are the **Int. Job Date** and the **Int. Job Time**. These are the date and time you are first intimating about the job instruction.

By default, they will be set for today's date and the current time. You could set the date and time for when an incident was reported to you or leave it as the default.

Beneath these fields, you can set the **Job Type** as relevant for the work required. This will let your contractor know a type for the work requested.



If you have the **Development Area Codes** module, you will notice that below the job type field, there is an option to be even more specific for contractors about where the work is required. You can 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 this field here.
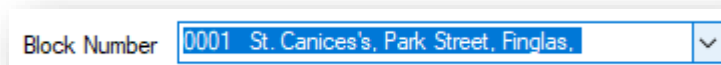


Make sure you enter the appropriate information into the **Development** and **Block Number** fields for where you would like the contractor to carry out the work.



If your job is for the whole development, then you can leave the **Block Number** field at **Select**. Otherwise, once you have selected the appropriate development you will notice that the **Block Number** options available in the drop-down menu will be relevant to that development.



If your job only concerns a specific client's property then set your development and block fields as appropriate and when you click on the **Client Account** field on the right you will be able to choose an individual client from the drop-down menu.

Once you have selected an individual client you will notice that in the **Telephone** number field below you can select a telephone contact number that you may want to pass on to the contractor to arrange access for the job to be carried out.



If the Job is external or involves the whole block then you can leave the **Client Account** on the default **Select** option unless you wish the client to be recorded as a contact point for the contractor for the job.

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.



Moving back over to the fields on the left of the screen, select a **Job Number Type** which is appropriate for the job you are raising. This gives additional information to your contractor.



There are other options available in this drop-down menu for the **Job Number Type**.

If your job has come from a proposed work then it will already be listed as this job number type.

**Repair** and **Major Works** may be chosen by you to help categorise your job.

**CODNP** stands for charge out do not pay and acts like a flag on the job for yourselves.

In the field below, leave the **Action** as **Yes** to allow the Job to be commenced as soon as possible or you can mark this as **No** if you would like to record the information but take no further action.



In the **Description** box, enter a specific description of the work required, including details which will help the Contractor carry out the work. In this example, there are three separate tasks which need to be carried out. This description is therefore acting as the overall description for all works which are due to be carried out.



*Please note that if you can fit your description into this box then it should fit onto the work order which will be sent to your contractor later in the process. However, you may want to avoid entering something too detailed here.*

In other situations, to save time and allow for consolidation later you can press **F5** on your keyboard to access a pre-set menu of descriptions.

This will open the **Standard Description Codes** window and will list the ones already set up in your system.
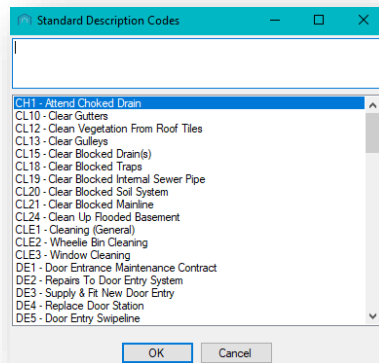


To search for a specific description, you can type a keyword in the box at the top of this screen and CPL will find any description containing this word and display the results in the box below.
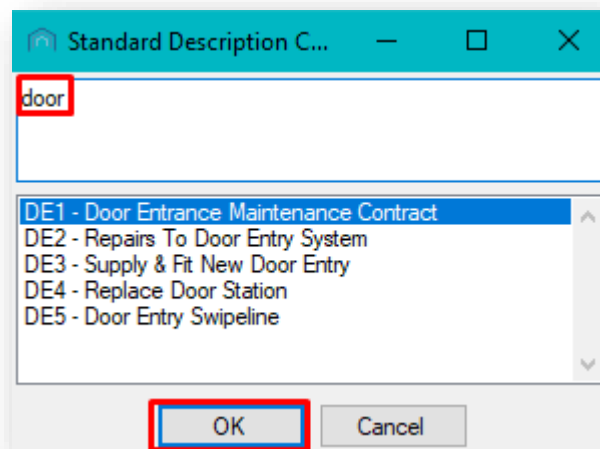


Once you have found a description you would like to use, highlight this and click on the **OK** button and it will be entered into the **Description** field on the Stage 1 tab of your job.

*Please note, descriptions are added into this list through accessing the **Standard Descriptions** option in the main **System** menu in CPL.*

*If you have the permissions to add these you will find them by selecting **System** in the main menu and then **System Parameter** from the drop-down menu which appears.*
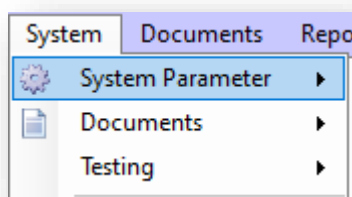
*From the further drop-down menu which appears you can select **Standard Descriptions**.*
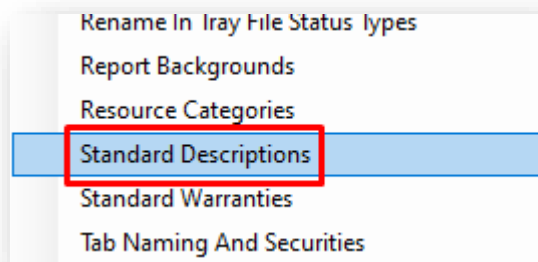


*This will open the **Standard Descriptions** options and you can add to this list by clicking the **Add New** option in this screen.*
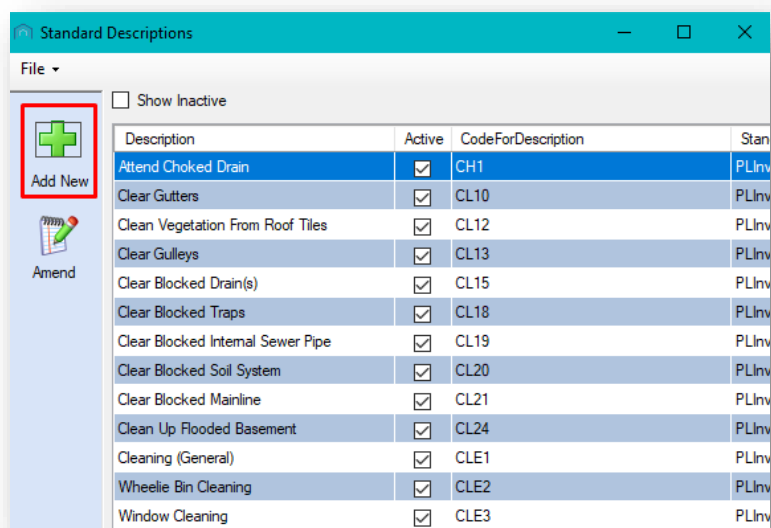


After you have checked over your information and completed all additional fields, you are ready to click on **Create New Job** in the **Action Panel** at the bottom of the screen.



*Please note that there is an option to **View Contracts** in the **Action Bar** at the foot of this screen.*
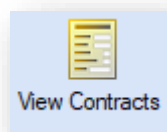
*Clicking on this icon would open up the list of **Warranty/Maintenance Contracts** already set up for this Development and would allow you to check if the issue is already covered by an existing contract to avoid you sending the job to the wrong contractor.*

Once you have clicked on **Create New Job**, you will be asked if you would like to set a reminder for the system to alert you to come back to the next stage of your job at a later date.
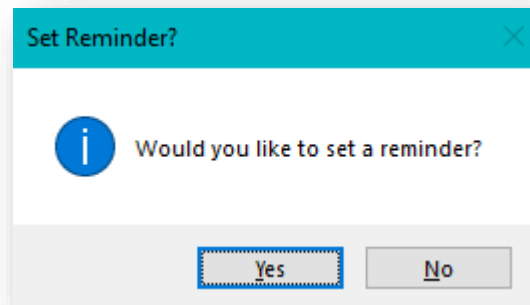


If you click on **Yes** you will be able to choose a date and time and click to **Submit** for when you would like to be reminded.
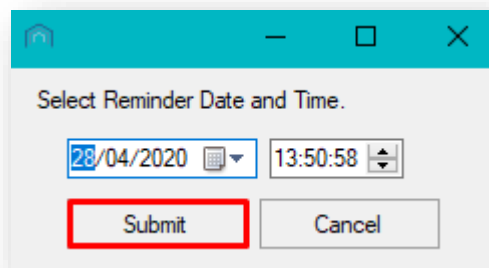


Clicking on **Submit** on the **Set Reminder Date and Time** screen or **No** on the original **Set Reminder** screen will prompt CPL to move you onto the second stage of the Jobs Maintenance process and you will notice you are now on the **Stage 2: Create Work Order** tab.

### JOB MEMOS, DOCUMENTS AND COMMENTS

Within the tabs available for your job, there are three tabs available on the right for **Job Memos**, **Documents** and **Comments**.

You can add **Memos** at any point during the jobs process.

Memos can be added by clicking on the **Add** option on this tab.

You can also add memos from the **In-Tray** and memos will also be added automatically by the system when you confirm that **RAMs** (Risk Assessment and Method documents) have been received.

As you progress through the jobs process, documents will automatically be added to the **Documents** tab as work orders are being sent. You can also click to send and receive documents from this tab. For example, if you needed to send more information to your contractor or they had sent additional information about the job which you wanted to store.



The comments section is used if you are integrated with the Blockworx system ([www.blockworx.co.uk](www.blockworx.co.uk)) and will show the exchange of comments between you and the contractor for this job. Entering a comment here will mean that this is received by the contractor when they are logged into Blockworx.

## STAGE 2: CREATE WORK ORDER

If you leave the Jobs Maintenance system and come back to it later you will have to search for your job using the filters at the bottom of the Jobs Maintenance screen.

Click again on the **Jobs Maintenance** tab in the main CPL window.



This will open the **Jobs Maintenance** screen in CPL.

Use the various filter options in the **Filter/Search** area at the foot of the screen to help you find your job.



The easiest way may be to use the **Development Number** or **Description** fields or the **Property Manager** drop-down menu.

After you have entered your information click on the **Search** icon. The results of your search will be displayed in the grid.



Click on a job in the grid to select it and you will notice the **Pin Panel** on the left will display information that should help you to decide if this is the one you are looking for.



If it is the job you're looking for, click on it to select it and click the **Amend** icon in the **Action Panel** or double-click your job. Either of these options will open up the job to let you continue to move it to the next stage and complete your work order.

You may notice that the top blue area of this screen now contains a summary of the information you added during Stage 1.

Your job has now been given an **Order** number; it's recorded as being **Task1** and being on **Stage 1**. The **Status** will also have changed to **PSC** representing **Phone Sub-Contractor** as a reflection that you will be getting ready to contact your contractor about the job to confirm they can undertake it. You will also be sending your work order through to them.

In this area at the top of the screen you will also see any **Warnings** you have listed in the system which could affect a job being raised. For example, the existence of maintenance contracts or whether the building is classified as a listed development.

The information you filled in for Stage 1 has been brought over into this Stage 2 tab and there are some additional fields for you to complete in this screen.

If your job has been brought over from the Estimates, Proposed Works or Cyclical Maintenance modules (if you used these) then your job will come straight to Stage 2. In this case, this would be your opportunity to check the details before they officially become jobs and complete the rest of the fields.

The **Job Date** and **Job Time** fields will default to today's date and time but you should set this date for when you are instructing your contractor to move ahead and begin the work.

The field below allows you to set a **Priority** from the options in a drop-down menu.



You need to inform your contractor which **Priority** you would like to set for the work to be carried out in order to let them plan when it needs to be done. Choose from the various options available depending upon your requirements. You will note these have timings in brackets next to them. This will give your contractor notice of the time you expect them to begin the work based on the date and time you set in the previous fields.

Based on your **Priority** selection the **Due By Date** and **Due Time** will be set accordingly.



These can be used as indicators for your contractor for when the work needs to be completed.

*Please note that the **Priority Codes** and respective time in days and hours can be customised under **System Parameters** in CPL.*

*If you wish to do this, select **System** in the main menu and then **System Parameter** from the drop-down menu which appears.*
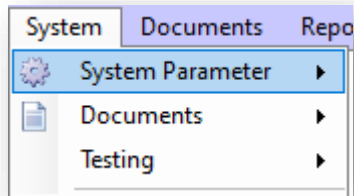
*From the further drop-down menu which appears you can select **Priority Codes**.*
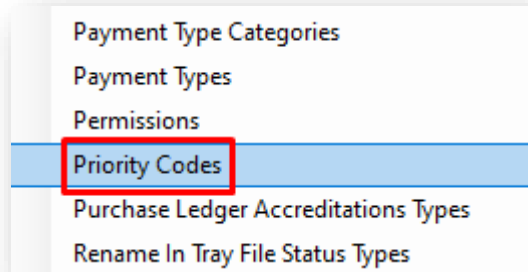


*This will open the **Priority Codes** options and you can add to this list by clicking the **Add New** option in this screen. You can also amend any of the existing priority codes if you wanted to adjust the days and hours set against each.*

After setting your priority and date and time, select how you have **Confirmed** the job with the contractor by selecting from the drop-down menu of options. You will want to contact them first to ensure they can undertake the job before sending a work order through to them.
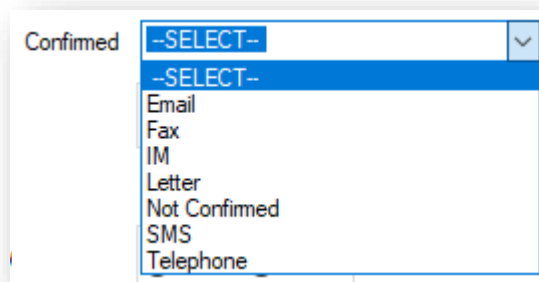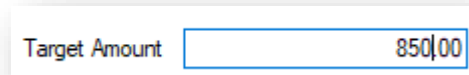


In the **RAMs Required** section you can select **Yes** or **No** to indicate to your contractor whether you require a Risk Assessment and Method Statement document submitted for the job. The job may be at height or in a dangerous area and you might need your contractor to confirm that they have assessed all of this before undertaking the job.

*Please note that there is a **System Option** which controls whether the RAMs feature is enabled for your system. Contact CPL Support if you would like to discuss this.*
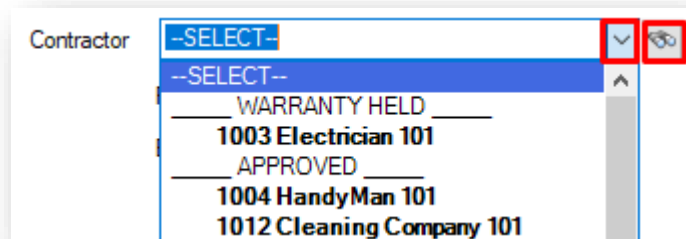
At the top of the next column, enter a **Target Amount** for the work being undertaken.

The target amount will allow you to note what the contractor or your Property Manager think the cost of the job will be.
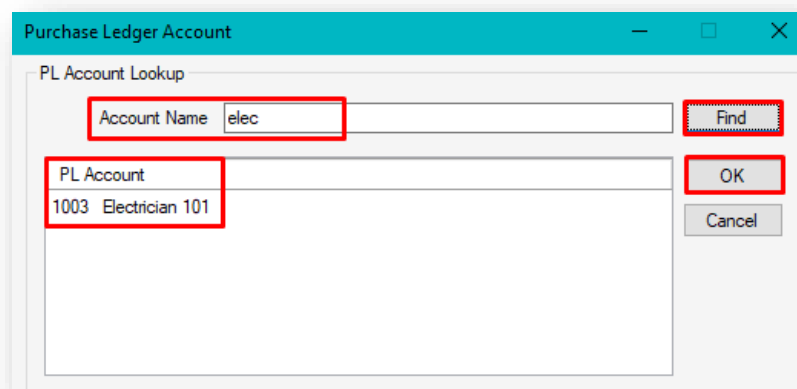


Beneath the target amount field you are also being asked to select the **Contractor** for the work which is required.



You can either choose from the drop-down list of contractors which have been recently used in the system or click on the binoculars icon to use the **Search** option to search for another contractor in the system. If you click to search it will open the **Purchase Ledger Account Lookup** window:
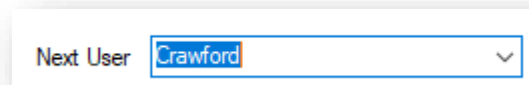


If you enter a keyword from the account in the **Account Name** field and then click on the **Find** button, the system will search PL Accounts. Once you find a contractor you would like to use click on this and then click on the **OK** button to enter this contractor into the field on your Stage 2 jobs screen.

Once you have selected the contractor you will see the corresponding contact details for them listed below as the system will populate this from the information held for that specific contractor in their PL Account in CPL.
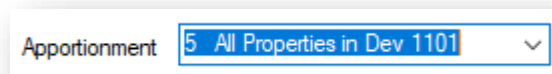
As on Stage 1 of the process, should you wish, you can use the **Next User** field to pass the next stage of the process onto another member of your company.

They would then receive a notification in CPL to move forward with the next part of the process.



In the field below, you also have an option to set an **Apportionment** for this work order to help you with billing your clients. You can make sure this information is there as a guide for when this invoice is being charged out to your clients.



In the **Description** field, you should check that you are happy with your 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:
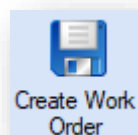


This will enter all information required into your Word Order Template held in the system.

If there is a job warning limit set across all jobs, or across an apportionment or an individual property and your target amount is above this, then you may see a pop-up window asking if you have the authority to proceed with the work order.
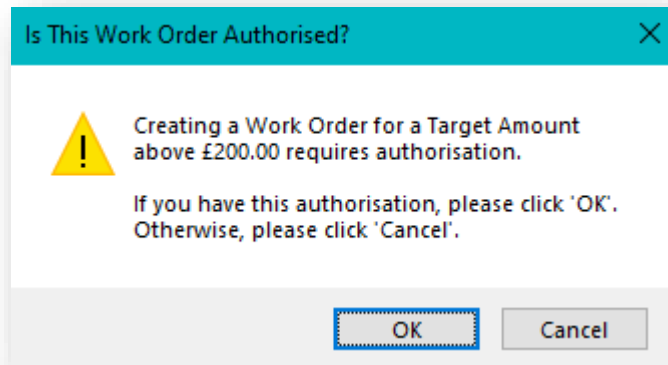
If you do have the authority to proceed then you can click on **OK** or you can click **Cancel** and seek this authority before proceeding any further with this job.

*Please note that there is a **System Setting** which can be activated by CPL for a limited target amount across all jobs or **Job Warning Limits** can be set in either/both an individual **Apportionment** or an individual **Property** screen.*

A pop-up window will appear with your **Order Number** and confirmation that your work order was successfully created. Click on **OK** to dismiss this.
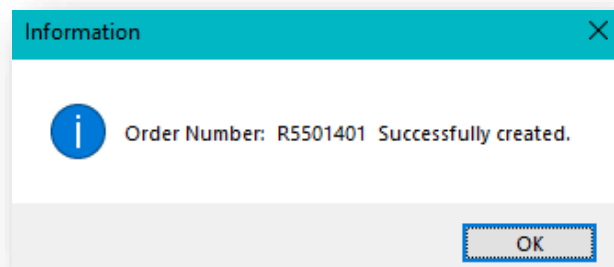


At this stage you may notice that the summary information at the top of your screen has changed.



Now that you have selected a contractor for the job, any expiry warnings for any insurance or health and safety certification will be listed in red.

Because this specific example was marked as requiring RAMs info from the contractor then the **Status** has changed from **PSC** to **RR** for **RAMs Required**. If we had not marked it as RAMs required then the status would have been updated to **JIP** for **Job in Progress**.

If you have marked that **RAMs** are required in Stage 2 then this will be recorded as **RR** as the **Status** until you record in the system that you have received these.

If you are not requesting RAMs in your job then you can continue to the **Emailing/Printing Work Orders** section below.

If they have been marked as required then you will not be able to email or print your work order until you have emailed to request RAMs. If you look at the **Action Panel** at the foot of the screen, then you will note that other than **Cancel** all other icons are greyed out except the **Email RAMs** option.
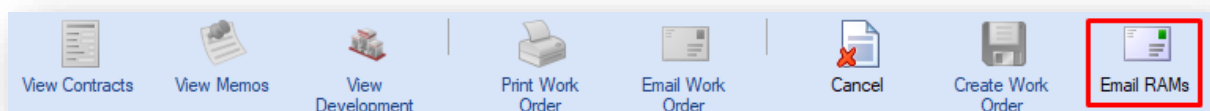


If you click on the **Email RAMs** option the system will ask you to confirm if this is what you would like to do.
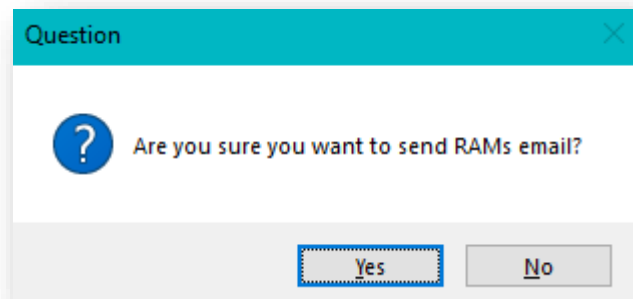


Once you click on **Yes**, you will see the **Attach Job File(s) To Email(s)** screen which would allow you to send a template for the RAMs to your contractor for them to confirm that they have assessed the risk and have measures in place to mitigate this.
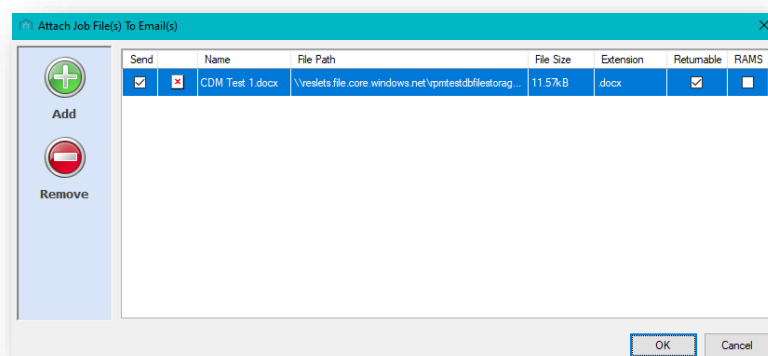
Click to add any file/template and then click on **OK**.

You will see a pop-up window telling you that the RAMs documents were sent. You can click on **OK** to dismiss this.
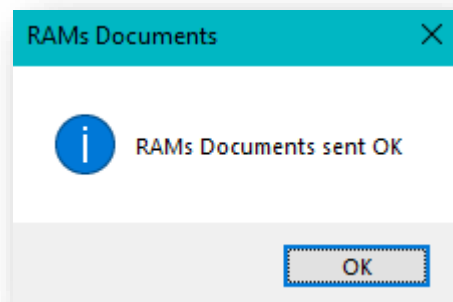


Having requested your RAMs documentation to be completed, you would wait for this to be returned to you by your contractor.

### EMAILING/PRINTING WORK ORDERS

If you have exited from your job you would need to locate it again in the **Jobs Maintenance** screen.

To access this, click again on the **Jobs Maintenance** tab in the main CPL window.
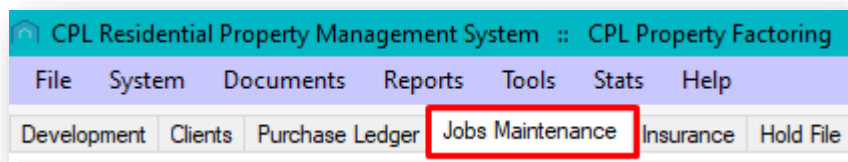


This will open the **Jobs Maintenance** screen in CPL.

Use the various filter options in the **Filter/Search** area at the foot of the screen to help you find your job and open this.

Your job will open on the **Stage 2: Create Work Order tab.**

Once you have created your work order (and emailed to request your RAMs, if appropriate) you have the option, in the **Action Panel** at the bottom of the screen, to email or print and send your work order to the contractor in order to instruct them to begin the job.
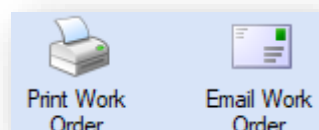


If you click on **Email Work Order** you will be presented with a pop-up window asking **Are you sure you want to email the job order?**
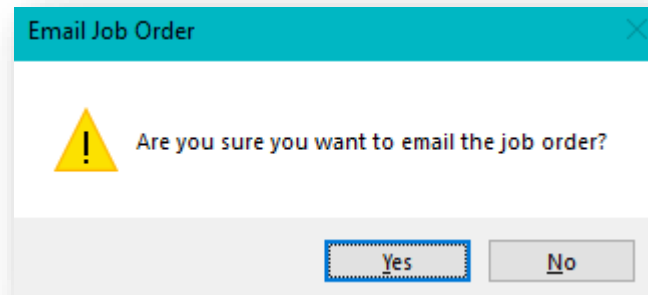
Clicking on **Yes** will then present another window.

If you did previously request RAMs then you will see a window asking if you have received these back from your contractor.
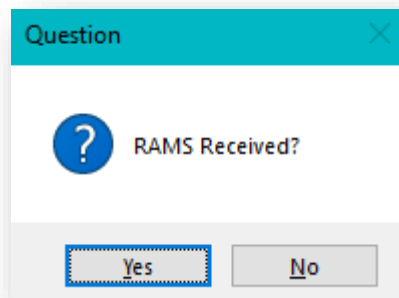


If you have received these then click on **Yes** to confirm and you will be taken to the **Attach Job File(s) to Email(s)** screen.

You will be taken directly to this screen from clicking the **Email Work Order** icon if you didn't request RAMs.
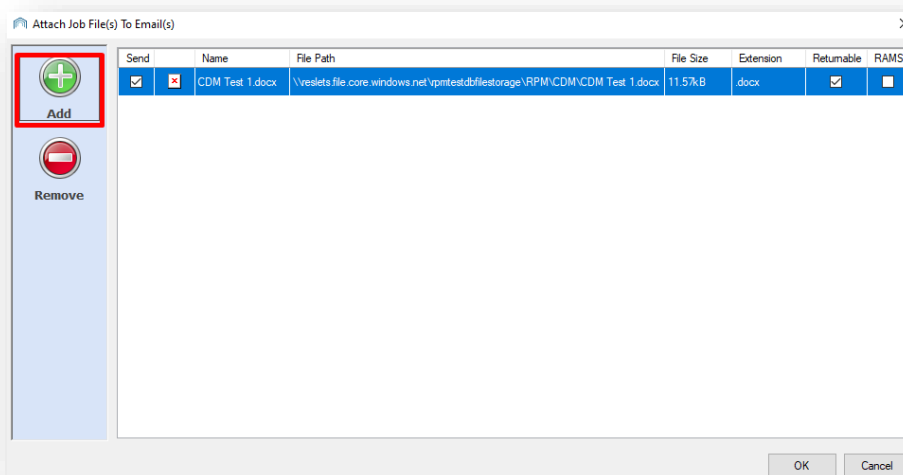
This screen will give you the option to give your contractor additional information they will require for carrying out the work. You may, for example, want to attach photographs of the damage or maps of the location. In addition, if you did previously opt to request RAMs from your contractor then you can send a CDM (Construction Design and Management Regulations) document if you haven't already sent this with your RAMs request.

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.
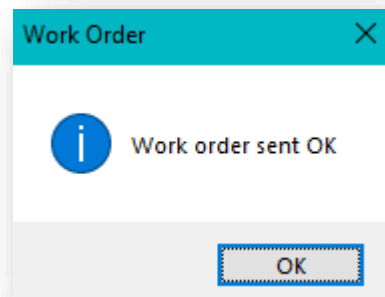




If you are using the BLOCKWORX portal with your contractors then they will be able to see the work order straight away in **Blockworx** and communicate with you from there.

If you need to print your work order then click on the **Print Work Order** icon and you will see the **Send Jobs Work Order** screen.
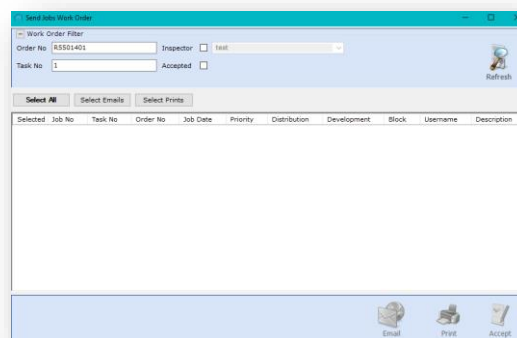


This will allow you to print your work order and send this to your contractor and/or keep a copy for your paper files.

After you have checked your printed version of the work order you can click on the **Accept** icon to verify that you are happy with the printed version and to confirm that you are sending it.

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.

These emails will also be stored in the **Documents** tab for your job.
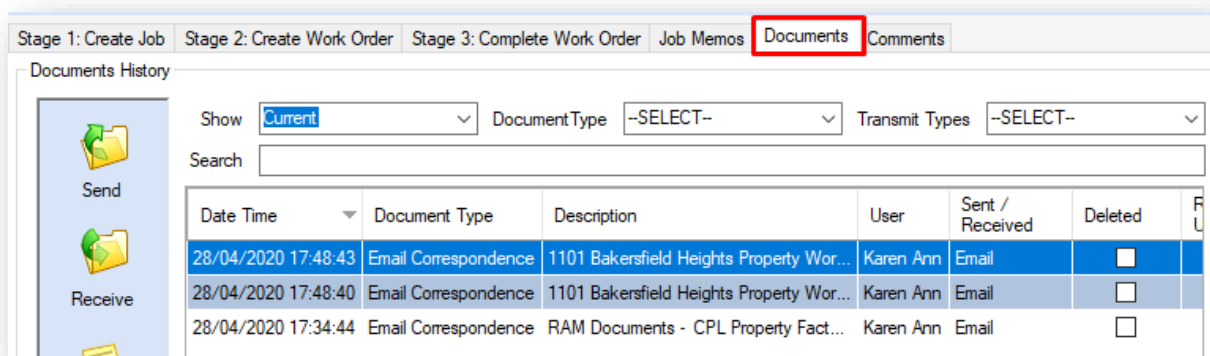


You may also notice that the **Status** of your job in the top blue panel will now have changed to **JIP** or **Job in Progress**.
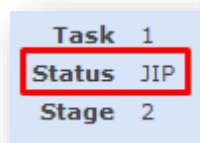


## ADDING A NEW TASK TO YOUR JOB

There may be circumstances where you would like to split your job down into several tasks with the same contractor or with different contractors, rather than these be raised as separate jobs. Each of these tasks will need to have a separate work order created for them and then sent to the contractor.

This will now be outlined in the steps below. If you don't wish to create any additional tasks then please proceed to the **Update Due By Date** section of this guide.

If you have exited from your job you would need to locate it again in the **Jobs Maintenance** screen.

To access this, click again on the **Jobs Maintenance** tab in the main CPL window.
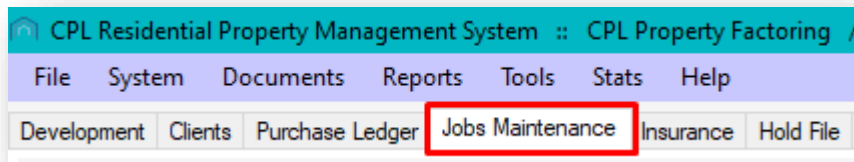
This will open the **Jobs Maintenance** screen in CPL.

Use the various filter options in the **Filter/Search** area at the foot of the screen to help you find your job and open this.

Your original job will open on the **Stage 2: Create Work Order tab**.

Once you have created your work order, you will see an option to **Add New Task** for this job in the blue **Action Panel** at the foot of the screen.
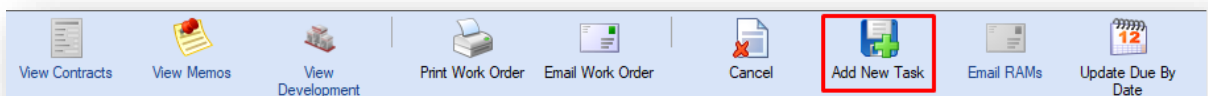


You will remain on Stage 2 of your job but you will notice that the previous Stage 2 fields are now empty and you will need to enter fresh information for these for the second task of your job. This is the same as when you first reached Stage 2 for your job originally or for what has now become task 1 of your job.

This will allow you to set a different date, a different priority, a different confirmation method, a different target amount, a different contractor and to edit the description for this task of your job. You can also decide separately if RAMs will be required for this task.

Fill in the fields for the second task of your job.



Once all fields are completed you can click the **Create Work Order** icon for this task in the blue **Action Panel** at the foot of the screen.
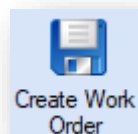


A pop-up window will appear with your **Order Number** and confirmation that your work order for this task was successfully created. Click on **OK** to dismiss this.
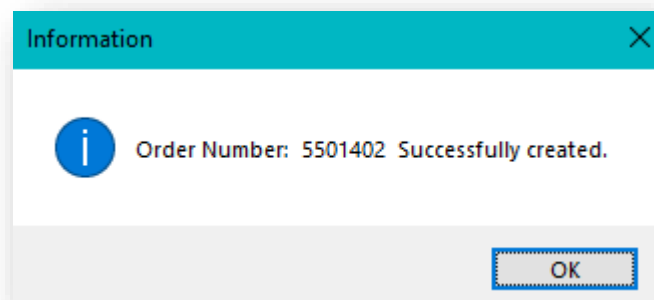
This **Order Number** will be similar to the original order number for your first task but with an **02** at the end to denote that it is the second task.

If you look in the blue header in your screen you will notice that it has been updated to let us know that we are on **Task 2** of this job.

| | | |
|---|---|---|
| **Job** R55014 | **Task** 2 | |
| **Order** R5501402 | **Status** JIP | |
| **Development** 1101 Bakersfield Heights | **Stage** 2 | |
| **Property** Karen Ann | | |

You can now move on to send this work order to the correct contractor for this task.

Once you have created your work order (and emailed to request your RAMs, if appropriate) you have the option, as with Task 1, in the **Action Panel** at the bottom of the screen, to email or print and send your work order to the contractor in order to instruct them to begin the job. This is the same as the process you went through for task 1.

Print Work Order        Email Work Order
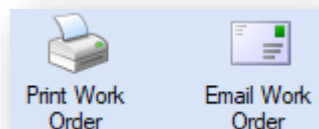
After emailing or printing your work order, you will find that you are back on the **Stage 2: Create Work Order** screen.

In the top blue panel of your jobs screen, you will see **Notices** informing you of any emails that have been sent out for the work order for this task.

| | |
|---|---|
| **Task** | 2 |
| **Status** | JIP |
| **Stage** | 2 |
| **Notices** | Email sent to jobs@cplsoftware.com |
| | Email sent to karen-ann.mcswiggan@cplsoftware |
| | Email sent to accounts@cplsoftware.com |
| | Email sent to karen-ann.mcswiggan@cplsoftware |
| | Email sent to fakeemail@cplsoftware.com |
| | Email sent to karen-ann.mcswiggan@cplsoftware |
| | Work Order Sent by Email |

If you have a third task to complete for this job then you can now click on the **Add New Task** option again to go through the same process as you did for Task 2.

Add New Task

Please note that after creating a second task for this job, both tasks will now be listed separately in the **Jobs Maintenance** screen.



## UPDATING THE DUE BY DATE FOR YOUR JOB

If you do not wish to update your due by date continue on to the **Stage 3: Complete Work Order** section below.

After you have created your work order for a job, you have the option to update the date you have added for when the job is due. This will affect when the job is listed as overdue in pop-up reminders and the **Jobs** card in the **Dashboard**. It will not affect the due by date already submitted to your contactor on the work order.

This can be edited after stage 2 of the jobs maintenance process has been completed and the work order has already been sent. This is controlled by a permission having already been granted in CPL. This is the **JobsTab Edit Stage 2 Due Date** permission.

To update this date click on the **Update Due By Date** icon which will be available in the blue **Action Bar** at the foot of your job screen.
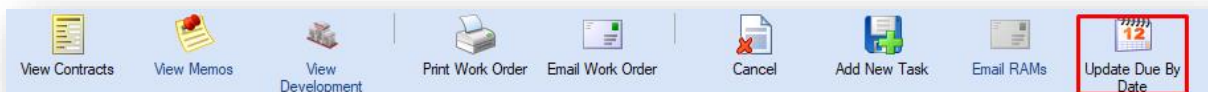


This will open a pop-up window which will allow you to enter a new date for the job or task.

Click on **Submit** to change the due by date.

## STAGE 3: COMPLETE WORK ORDER

Once your contractor(s) has let you know that they have completed their job(s), you will need to let CPL know about this by using the **Stage 3: Complete Work Order** tab in your job.

Return to the **Jobs Maintenance** tab in the main CPL window.
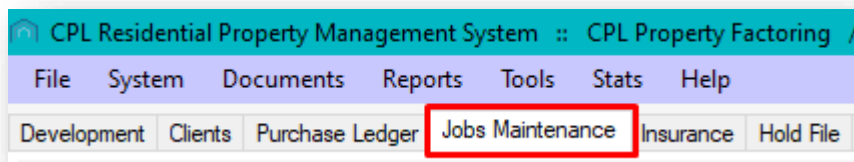


Use the **Filter/Search** options to find the correct job or task of a job that you need to update the details for.

As your job is now registered as **JIP** or a **Job in Progress**, you may find it useful to use the **Job Status** filter to search for it.

Use the drop-down menu in the **Job Status** filter to select **JIP Job in Progress** and then click on the **Search** icon.



Once you have located the correct job or task in the grid, double-click on this to open it.

Your job/task should now open on the **Stage 3: Complete Work Order** tab.

You can now use the fields in this tab to mark that your job has been completed.

You will note that the **Description** for this work order has been brought over from the previous screens.

Use the date and time fields to record when your contractor arrived on site and finished and then the **Time Taken** field will calculate the time taken to complete the job for you.



Click **Yes** to confirm that the job is completed in the **Job Completed** field.



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

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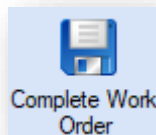
You will see a pop-up window confirming that the work order has been updated to **CAI**, signifying that the Job is **Completed Awaiting Invoice**.



Information

ⓘ  Work Order updated to ' CAI ' status.

OK
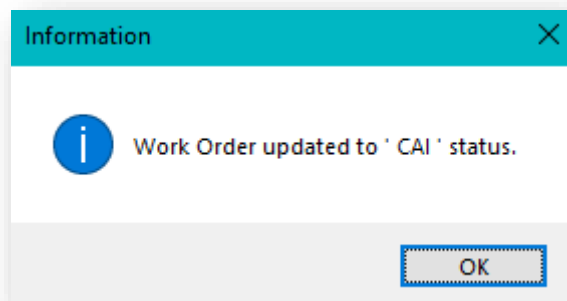
You can click on **OK** to dismiss this confirmation and the jobs window will close.

Once you have marked your job as completed you will notice that the **Status** information for your job will be updated in the main Jobs Maintenance grid.



*Please note that if you created several tasks for your job then you will have to carry out this process for each separate task.*

## COMPLETING A JOB INTERNALLY

If you have had an internal department carry out your job and you are not expecting to receive an invoice you can mark this job as **Complete Internally**.

You can do this for a job which is either in a **JIP (Job in Progress)** or **CAI (Completed Awaiting Invoice)** status.

To do this, open your job and go to the **Stage 3: Complete Work Order** tab.

Towards the foot of the page you will notice an icon labelled, **Complete Internally**.

Click on this icon and the system will check for confirmation.



Clicking on **Yes** will update your job to **INC (Internally Completed)**.

It will be marked as this at the top of the jobs screen.
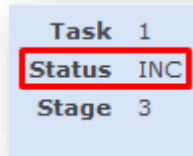
This will archive the job and remove it from your list of current jobs on the **Jobs Maintenance** grid. You will only be able to find it in the **Archived** jobs from now on.



## RECORDING AN INVOICE RECEIVED

When your contractor has submitted an invoice for the completed work you will be able to feed in the information already added for the job by entering the **Order Number** for your job into the **Purchase Ledger Transactions** screen and clicking the tab key on your keyboard.

You will be able to find this order number in the **Jobs Maintenance** grid.

## JOB STATUSES

A few of the different **Status Types** for jobs have been mentioned as we have progressed through the jobs maintenance process in this guide.

You may find this list of job statuses useful for information.

AUT - Authorization Required

CAN - Cancelled

NAT - No Action Taken

EST - Estimate Requested

PW - Proposed Works

INC - Internal Completed

CAI - Completed and Awaiting Invoice

EXC - External Completed

JIP - Job In Progress

RR - RAMs Requested

PSC - Phone Sub-Contractor


When jobs are listed in the main **Jobs Maintenance** screen you will note that there are jobs sitting as various different statuses.

If you run through the process outlined in this guide, when you are raising a job then you should be able to avoid having jobs sitting in several different incorrect statuses. The option to mark a job as **Internal Complete** described previously should also help you to avoid having jobs sitting without being finished or archived.

## WORK ORDERS BUTTON ON MAIN JOBS MAINTENANCE SCREEN

There is a **Work Order** icon on the blue **Action Panel** in the main **Jobs Maintenance** screen.

This can operate as a better workflow tool as it would allow you to bulk email/print out several work orders at the one time. If work orders have been sent from the jobs process on the way through then you would not need to use this tool.

Clicking on this icon opens the **Send Jobs Work Order** screen.

It is comprised of a series of **Work Order Filter** options in the top section of the screen and beneath this is a grid with an **Action Bar** containing various icons at the bottom of the screen.



You could click on **Refresh** without setting any of the filters and you will see every job in the system which has a work order created but not sent.
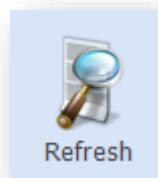


Clicking on the **Accepted** option would allow you to see every work order which had been sent in the system.

You could use the fields in this screen to enter a specific **Order No** or **Task No** to email/print out the work order without having to open up each individual job or task. Entering the order number and clicking on the **Refresh** icon would populate the grid with that specific job order.



Alternatively, you could save time by clicking in the **Inspector** tickbox and then choosing a particular user from your company from the drop-down menu and clicking **Refresh** to search for all of the jobs related to their developments for which work orders have not been sent.



Once the list of work orders has been returned, these will be displayed in the grid below.

You can select from the options displayed in the grid to send these work orders out by email or print them to post out.

If you click on **Select Emails** you will see ticks against work orders in the grid for contractors who are set up to receive email.



If you click on **Select Prints** you will see ticks against work orders in the grid for contractors who are not set up to receive work orders via email.



If you click on **Select All** you will see ticks against all work orders in the grid.



Once you have made your selection you can then choose from the **Email** or **Print** icons at the foot of the screen. You may want to send these in batches if you have a lot of them to send.

In this instance we have chosen to **Select Emails** and then click on the **Email** icon in the **Action Bar** to send these.



Once you have clicked on the **Email** icon, you will see a progress report appear across the bottom of the screen as these are being emailed to the individual contractors.
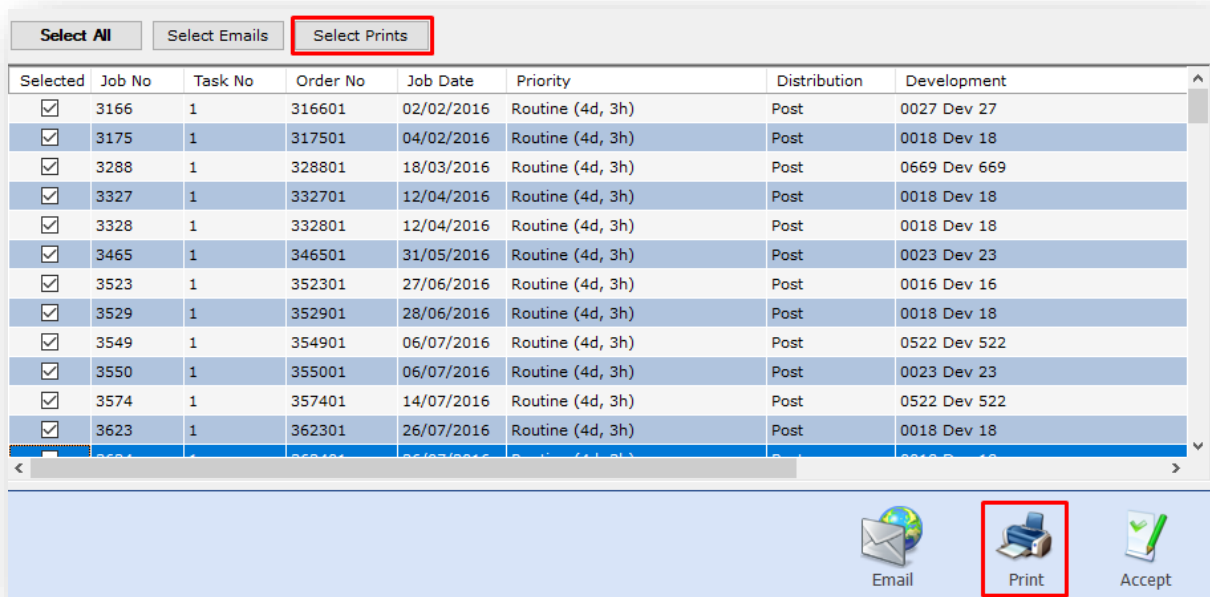


Once these have all been sent you will see a **Process complete** pop-up message. You can click on **OK** to dismiss this.



This system will then refresh back to the **Send Jobs Work Order** screen.

If you have work orders you would like to print to send out to your contractors then you can run the same process but click on the **Print** icon instead.

This will launch a **Reports** window for the work orders to allow you to page through to check these before clicking on the print icon in this window to send the work orders to your printer.
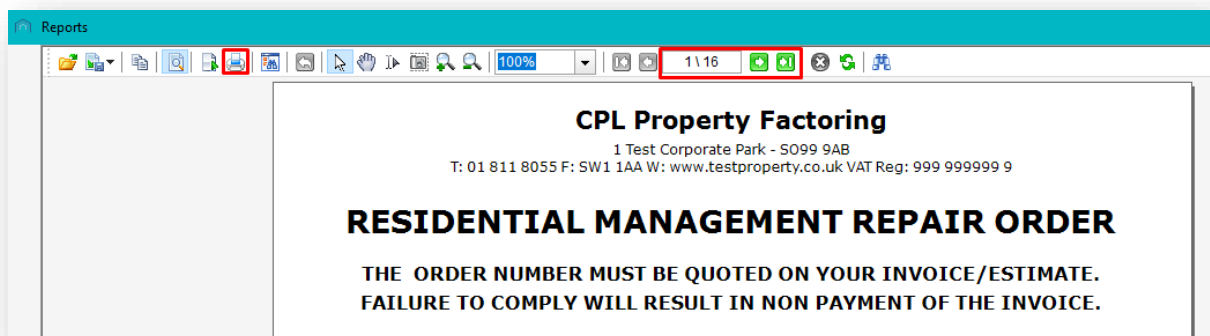


Once you have verified your print copies you can click on the **Accept** icon in the blue **Action Bar** to register that you are accepting these prints for the work orders.

You will then see a **Send Jobs Work Order** pop-up message telling you that the work orders have been accepted.
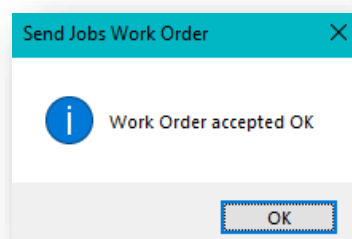
## CPL KNOWLEDGE BASE

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@cplsoftwareltd148.zohodesk.com or through our portal at https://contact.cplsoftware.com/portal/home or calling us on 0345 646 0240 (option 1).