CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

MAIL MERGE

TRAINING GUIDE FOR AZURE CLIENTS

AUG 2022

Version 1.2

CONTENTS

INTRODUCTION

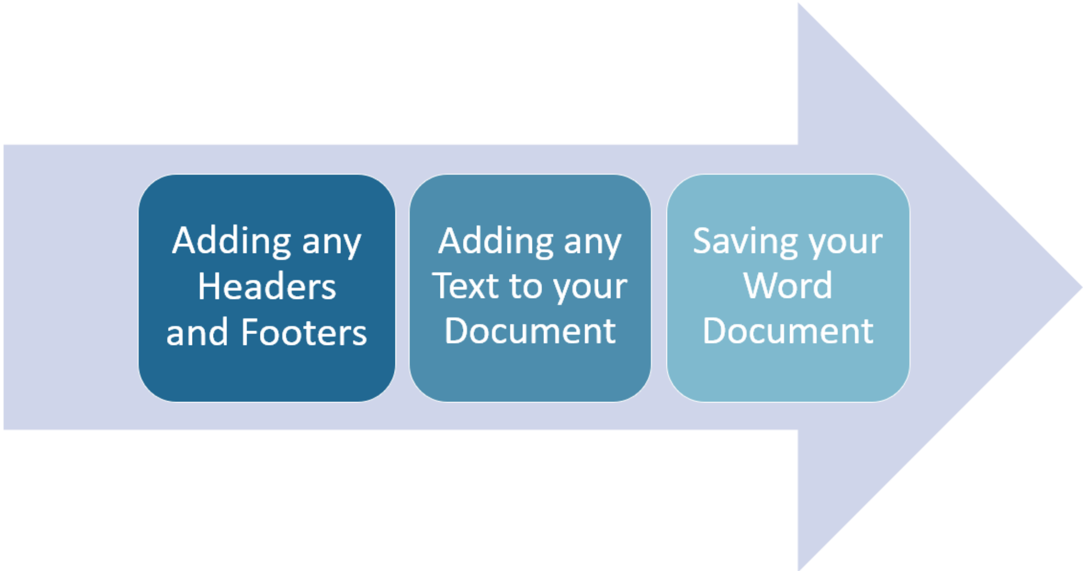
Mail Merges are used throughout CPL to create and distribute documents to your clients and contractors.

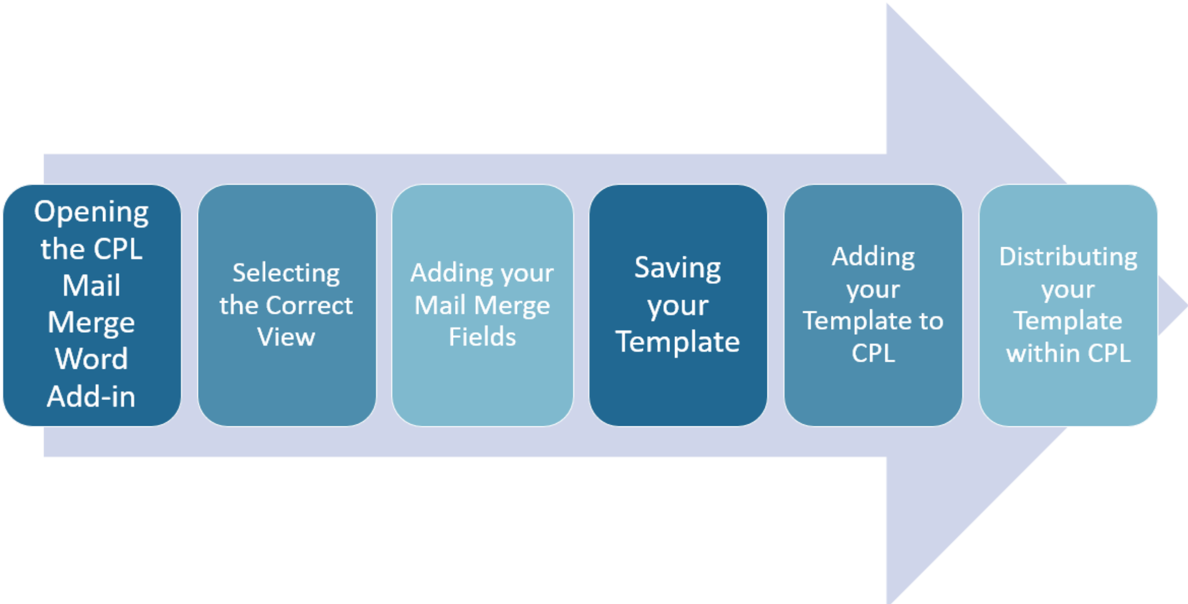
They allow you to create various generic templates that can be automatically customised for multiple recipients.

In the creation of your mail merge template you will use sections called **fields** which allow the document to get the appropriate information from different areas in CPL. You will also be able to add any general descriptive text to your template that you would wish all recipients to receive.

A template could contain fields such as **Name**, **Address**, **Balance**, **Account Number** which can be pulled directly from the details held in CPL and produce a fully customised communication which could be emailed, printed off or made available on the Client Web Portal for multiple individual clients.

This training guide will cover the following process.





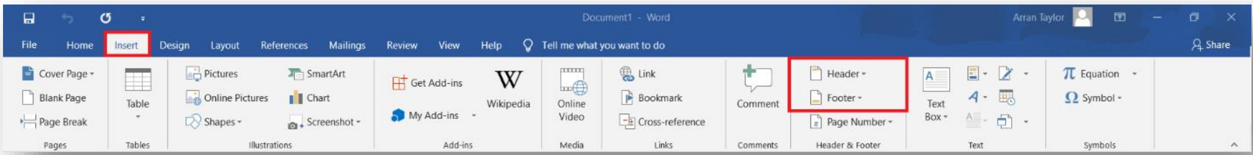
Please note that this Training Guide has been written based on the Microsoft Word 2019 version and the CPL Word Mail Merge Add-in and therefore the menu items may look slightly different on other versions of Word.

SETTING UP HEADERS AND FOOTERS IN YOUR MAIL MERGE TEMPLATE

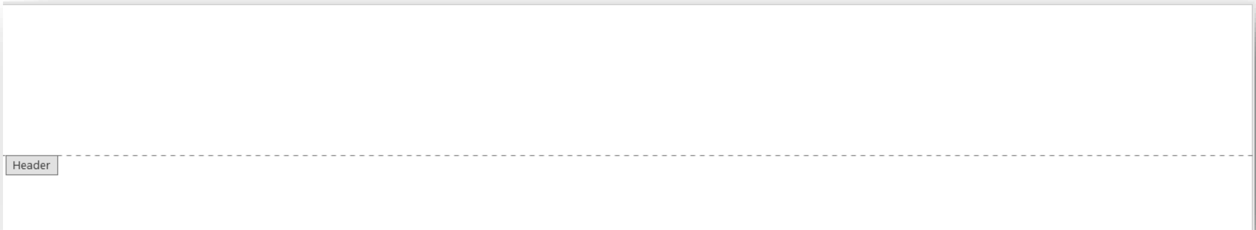
Using headers and footers in your document template will allow you to brand your document and identify it as coming from your company. You can set this up once and save your resulting document as a blank template which will make the creation of any future templates much easier.

Open a blank Word document to get started.

In your document click the **Insert** tab in the main menu ribbon and select **Header** or **Footer**.

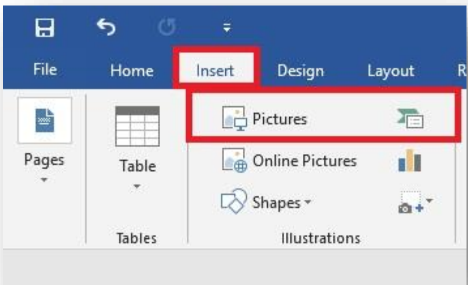


Word will now display a dotted line across the area selected and allow you to edit this area.



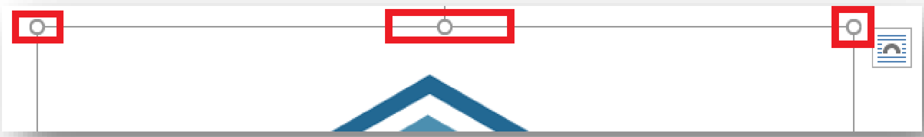
Add any header or footer text and/or images appropriate for your document.

Drag and drop your image or click on the **Insert** menu and choose the **Pictures** option:

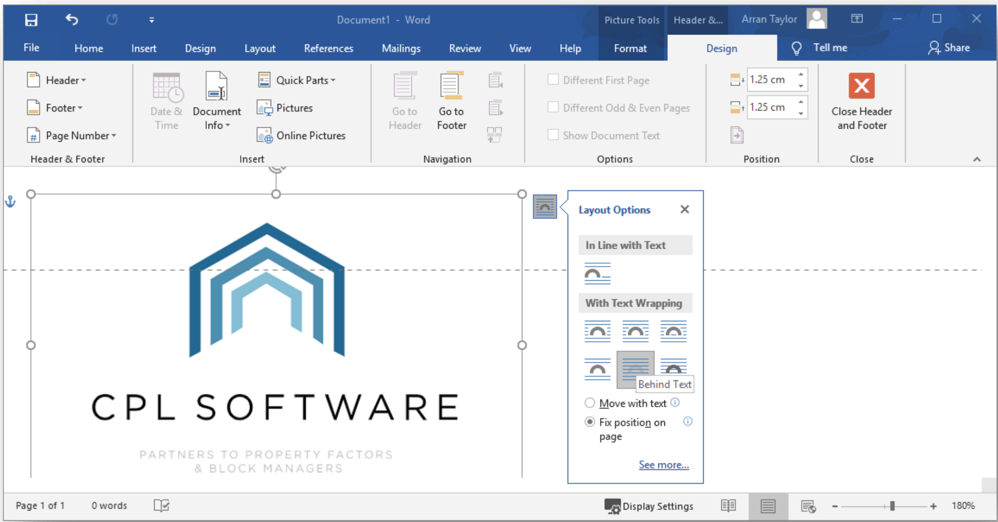


Browse for the image you wish to use and select it to add it to your word document.

Once you have added a header/footer image you can reposition it by clicking the image and dragging it into place. If your image is too large, you can use the sizing handles around the borders of your image to change its size on the page.



Clicking the image to highlight it will also give you the option to use the **Layout Options** menu to position your image:



You may want to consider using the **Behind Text** option to prevent your header from overlapping any text in your document. You may also want to select the **Fix position on page** option for your image.

Once you have positioned any header image and text you can repeat the process for the footer. Head to the bottom of the page in your document and double-click within this area to enable you to edit the footer in the same manner as your header.

Once the header and footer of your document are set up as per your requirements, you can then save the document.

If this is the generic header/footer document you intend to use to create other templates from then make sure the title reflects this to assist other members of your company to make use of it. You could save the document as **Mail Merge Blank Template Header and Footer** and place it in your document folder on the server to enable everyone to access this.

CREATING A MAIL MERGE TEMPLATE

This section will cover how to use the mail merge fields to create a communication.

You will be creating a communication similar to the one shown below.

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[title last name/first name]

[Company Name]

[Street Address]

[Postcode]

[Account Number]

[Date]

Subject of letter

Dear [title last name/first name],

Advise the Client of why you are sending them a letter

Why are you sending your client the letter?

What do they need to do next?

Closing the letter.

Your closing should offer any additional details the client may need. Such as when they can contact you, how to contact you and any other information the client may need.

Kind regards,

Factoring agent's name

CPL SOFTWARE

In the above example, every piece of text sitting inside square brackets [text] is a merge field. We will be addressing merge fields in the next section.

ADDING MAIL MERGE FIELDS

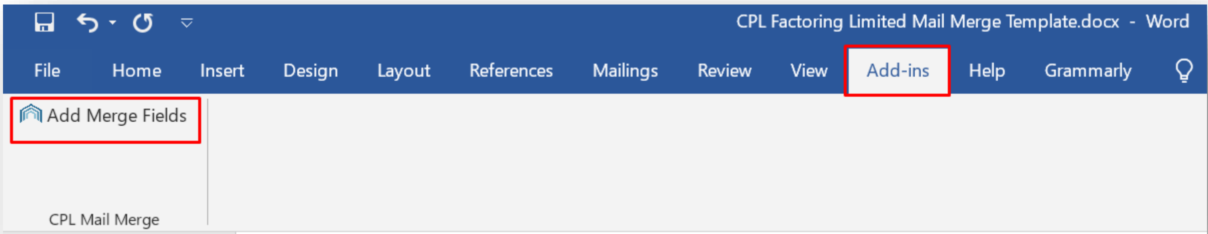
You are now ready to begin adding the mail merge fields. These fields will tell Word where to go to collect the information from CPL appropriate for each individual recipient.

You are letting Word know what data it needs to insert into your document, where it needs to get this data from and where specifically you would like this to be located in the document.

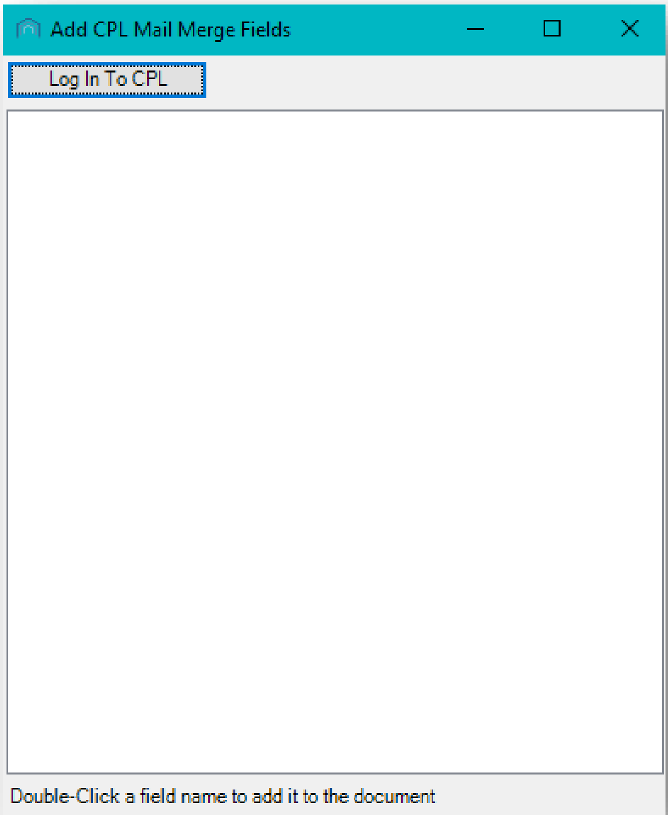
This allows Word to customise each letter/ communication you are sending to individual clients or contractors.

In Word, open a new document, or, if you wish to use standard headers and footers, remember to use the blank template document you previously created.

Click the **Add-ins** tab from the menu ribbon at the top of Word and then click on the **Add Merge Fields** option which will appear on the left of your screen.



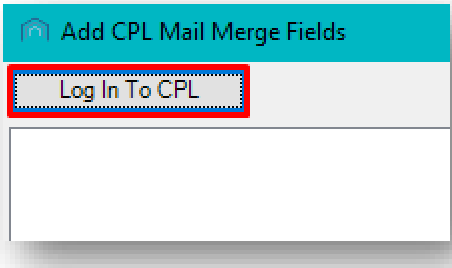
This will open an **Add CPL Mail Merge Fields** window.



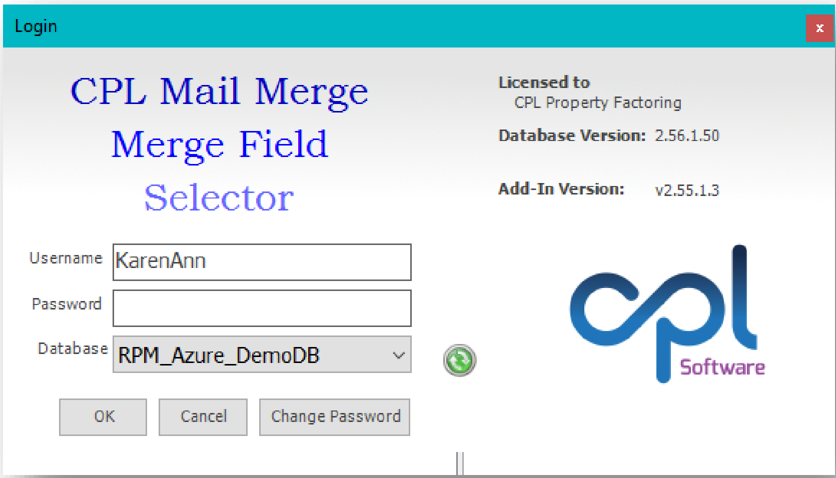
This window will stay on top, so you can type into Word without losing it. If it's in the way, you can move it around the screen.

If this is the first time you've called up the Add-In during this Word session, you will need to click the **Log In To CPL** button to access the database and get the list of merge fields.

However, if you close the **Add CPL Mail Merge Fields** window but don't leave Word, re-opening the Add-In will remember the list of fields.



Clicking **Log In To CPL** will bring up the **Login** screen you will already be familiar with.

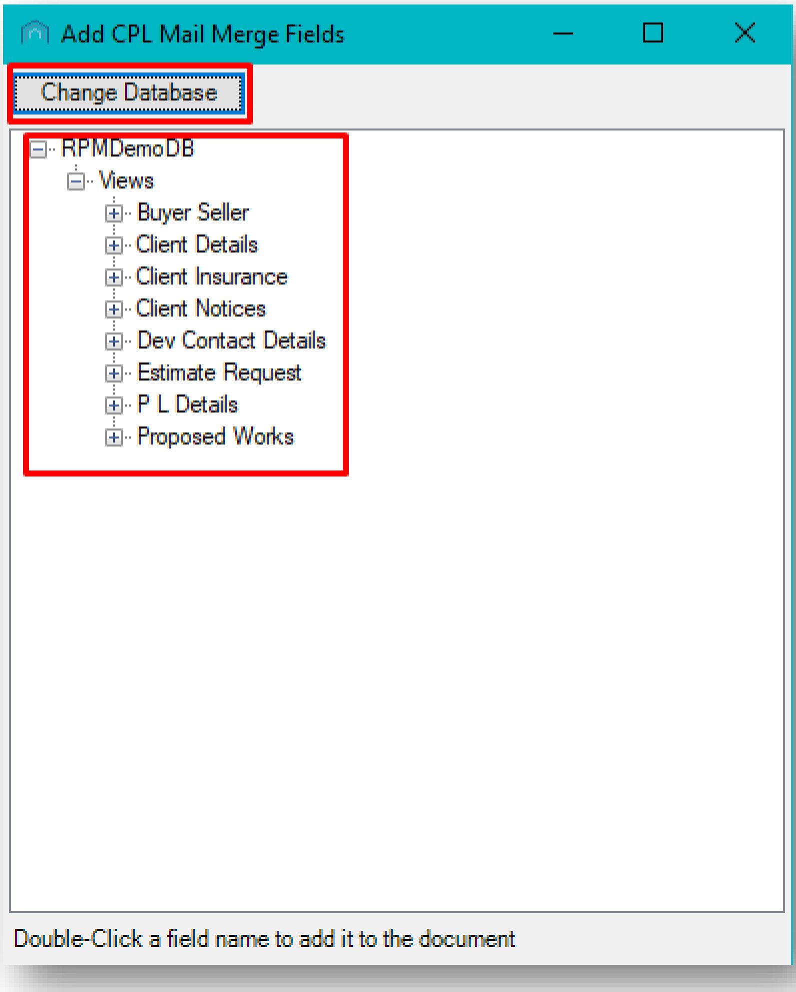


It will default to the last **Username** and **Database** you logged in with.

Log in as you usually would to CPL.

At this point, the **Add CPL Mail Merge Fields** window will change. The **Log In To CPL** button will change to **Change Database**, and clicking it again will bring the **Login** screen back up so you could log in to a different database if required.

The screen will also be populated with the database name and a list of all the **Mail Merge Views** available for you to use.



The names of the **Views** available are generally self-explanatory, however, below is a short description for each of them to help you select the correct one for your document.

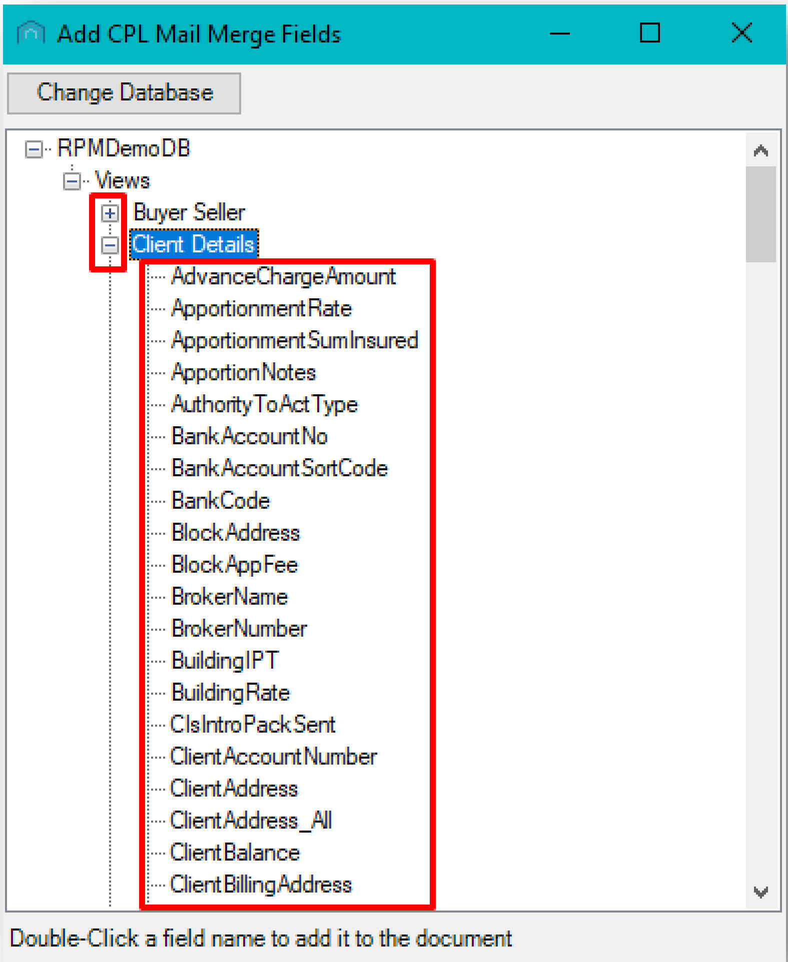
Please note that you can only select mail merge fields from a single view which is appropriate to the document type you will be using when you save your template.

*For example, if you are writing a client letter then you can only select mail merge fields from the **Client Details** view. If you are creating a document which is designed to be shared with your contractors then you can only select mail merge fields from the **PL Details** view.*

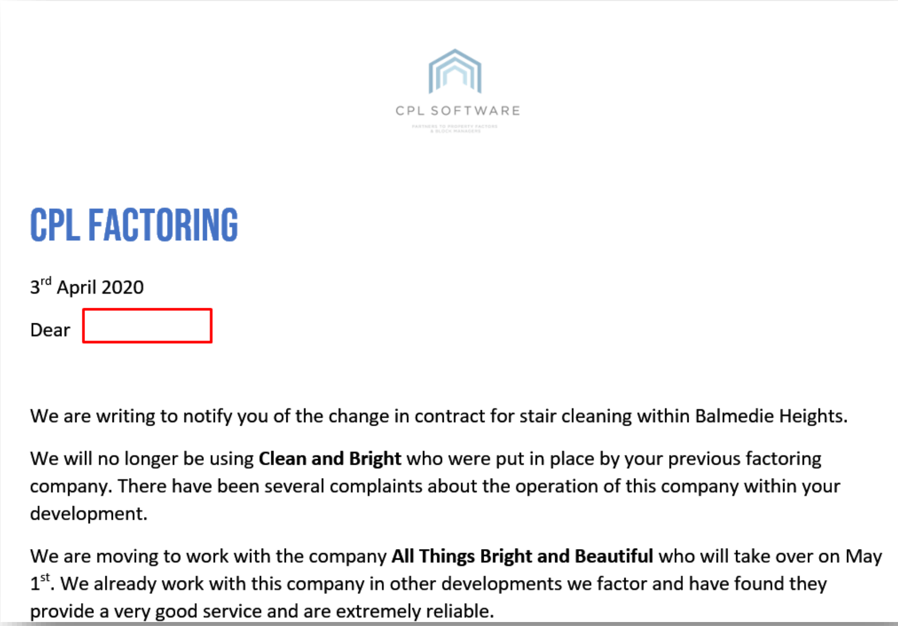
- **Buyer Seller** provides information for drafting communication for **buyers and sellers of properties.**
- **Client Details** provides information for drafting general communication with clients.
- **Client Insurance** provides information for drafting communication with clients regarding **Insurance letters.**
- **Client Notices** provides information for drafting communication that is part of your **Debt Management.**
- **Dev Contact Details** provides information for drafting communication that will be sent on a **development wide basis.**
- **Estimate Request** provides information for drafting communication regarding **Estimates** to be sent to your **contractors.**

- **P L Details** provides information for drafting communication regarding the **Purchase ledger**, normally for your **contractors.**
- **Proposed Works** provides information for drafting communication regarding **Proposed Works.**

Clicking any of the **+** options will expand and list all the **Mail Merge Fields** within that View.



In order to insert a mail merge field into your document, place the cursor where you would like the field to go.



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CPL FACTORING

3rd April 2020

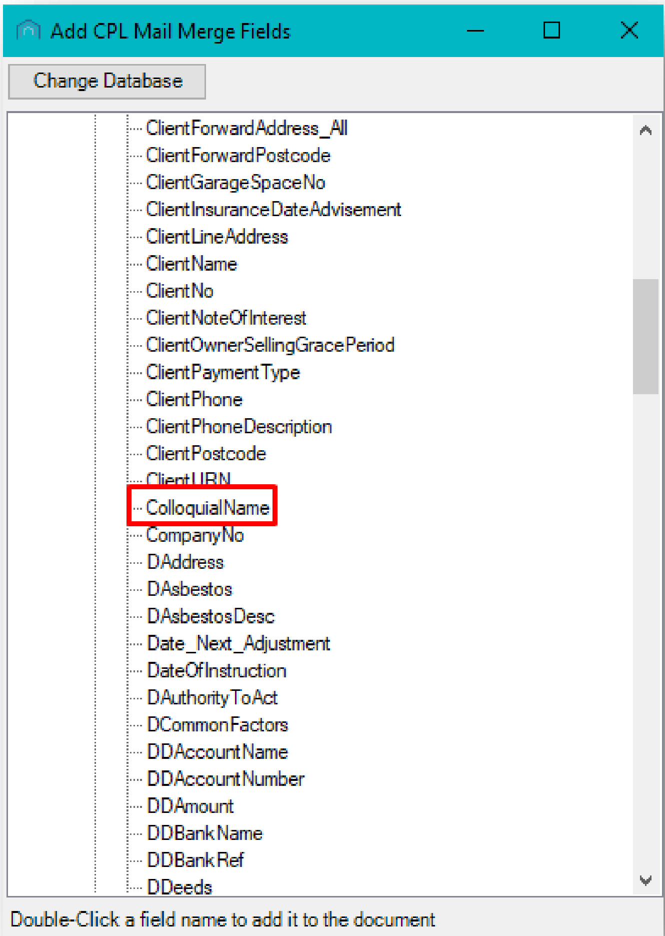
Dear

We are writing to notify you of the change in contract for stair cleaning within Balmedie Heights.

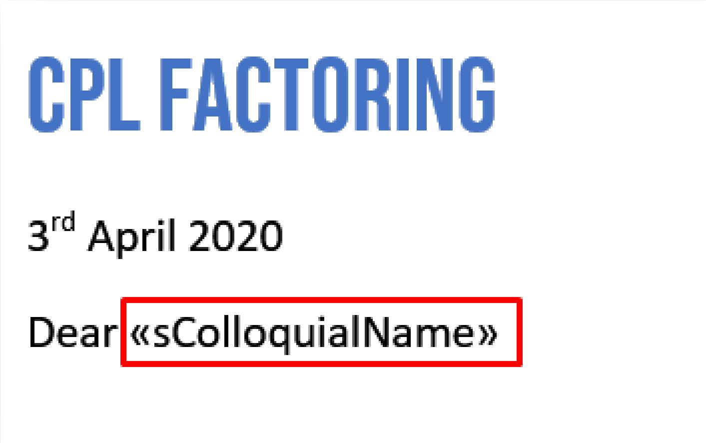
We will no longer be using **Clean and Bright** who were put in place by your previous factoring company. There have been several complaints about the operation of this company within your development.

We are moving to work with the company **All Things Bright and Beautiful** who will take over on May 1st. We already work with this company in other developments we factor and have found they provide a very good service and are extremely reliable.

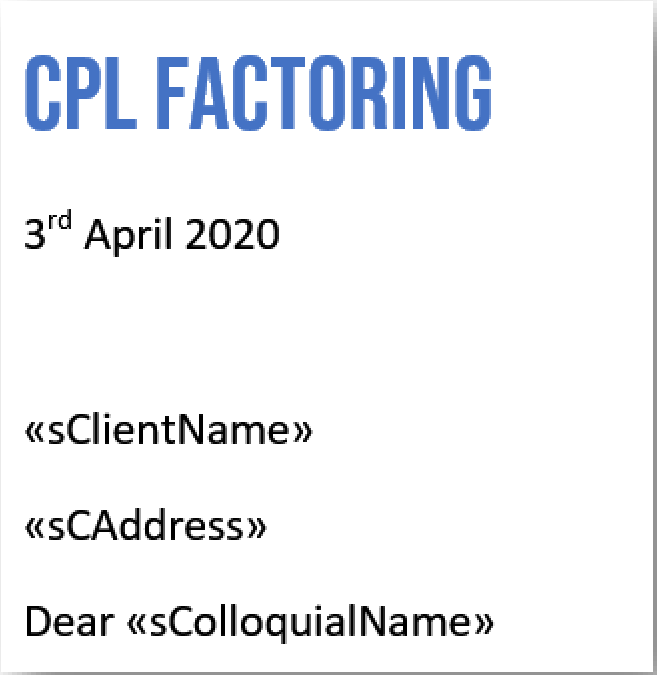
Then head to your **Add CPL Mail Merge Fields** window.



Double-click on the name of the **Mail Merge Field** to insert that field into your Word document where you placed your cursor.



You are now ready to move to another position within your Word document to select the next position where you would like to add your next merge field. Click in the correct position and then double-click on the field in your **Add CPL Mail Merge Fields** window again to insert the next field. Repeat this process until you have added all the merge fields required for your document.



Please Note: there is a known bug in Microsoft Word where it won't show the full name of a Merge Field that has a space in it.

*You can see the full Merge Field Name by clicking on the field in your document and clicking **Alt-F9**.*

There are many different merge fields available for each type of letter or communication you could produce and it is important to make sure you choose the correct fields for your purpose.

The names of these fields available are generally self-explanatory, however there will soon be a CPL Helpsheet available called ***Helpsheet Mail Merge Fields in CPL for Word Add-in*** *which will assist you in finding the specific fields you are looking for as it contains short descriptions of each field.*

In order to decide where you will want to use mail merge fields in your document you will need to identify the parts of your letter that will be different for each individual client/ developer/ contractor. For example, everyone will have a different address and it therefore makes sense to use a merge field that relates to an address. Every client will have a different balance and if you want this to be part of your communication then you could select a merge field that relates to balances.

You will need to select each field you wish to use individually. Before selecting a field, make sure you have clicked in the correct position in your Word document.

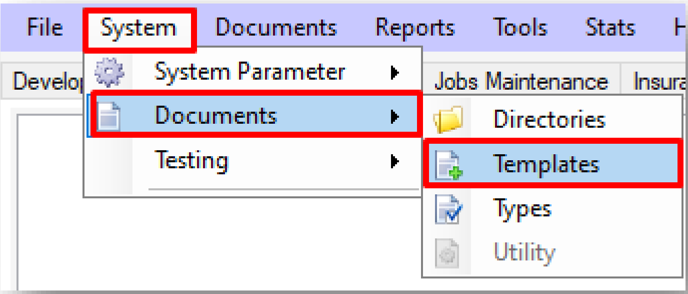
When you have added all the appropriate merge fields in the correct positions into your document you can now close the **Add CPL Mail Merge Fields** window.

You have successfully created a mail merge template. You should now save this onto your computer.

The next step is to add this to the directory in CPL so that this **document template** will be available to all CPL users in your company to use it for communications.

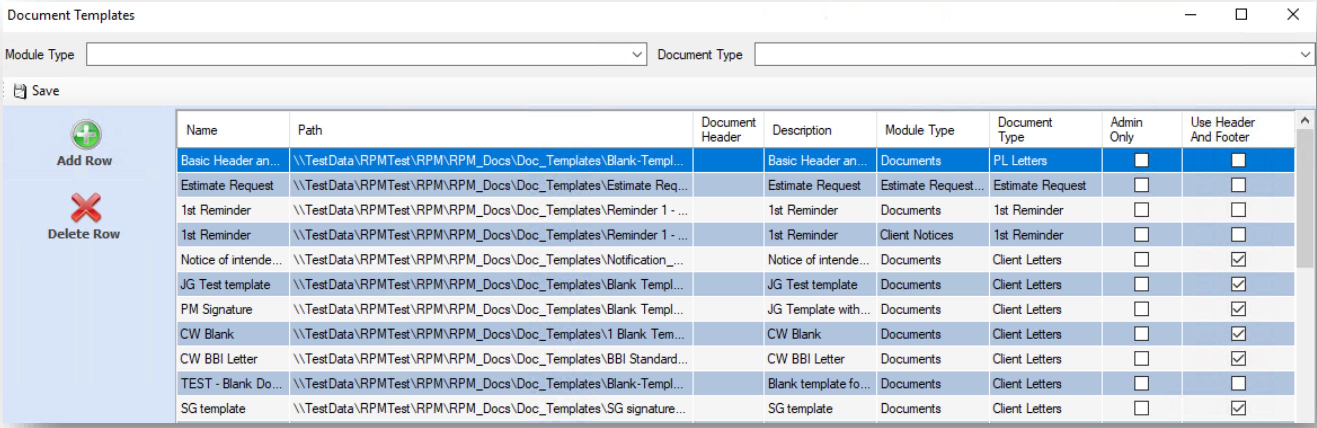
ADDING YOUR MAIL MERGE TEMPLATE TO THE TEMPLATES DIRECTORY

To add your document to the templates directory in CPL, select the **System** menu from the top of the main window and then select **Documents** and then **Templates**.

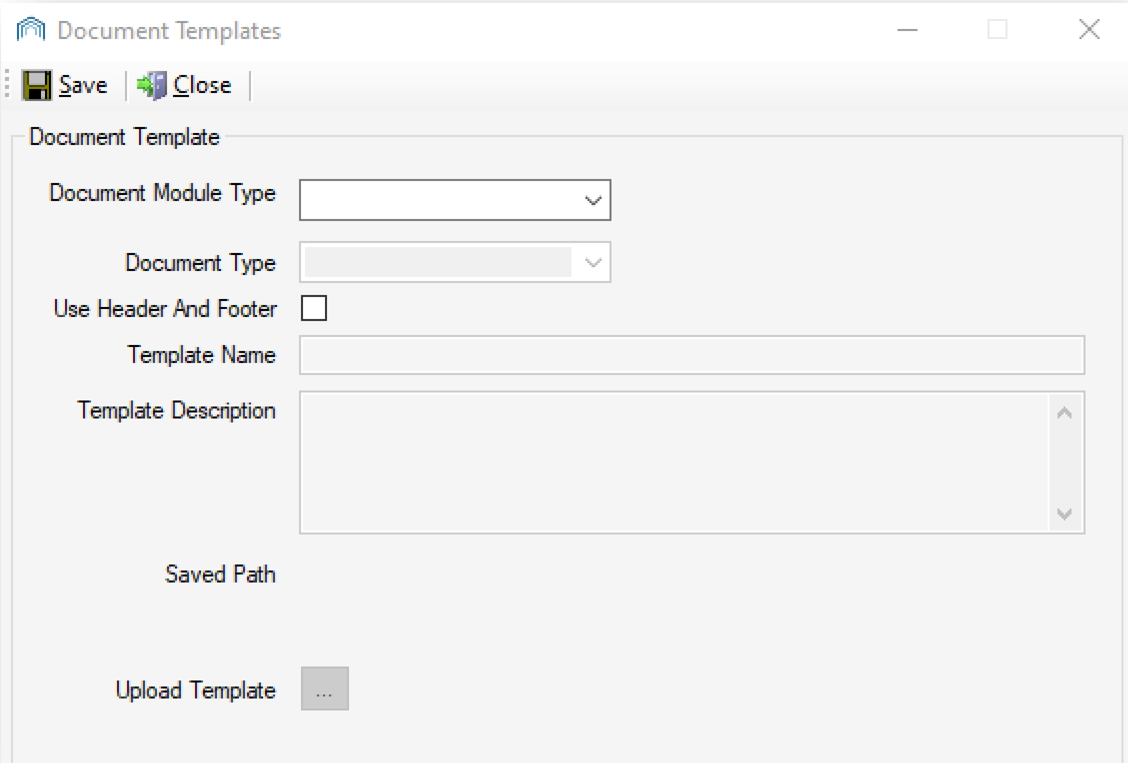


This will open the **Document Templates** window.

In this window you will see a list of all the **Document Templates** that CPL holds a record of for your company.



In order to add your **Document**, select **Add Row** from the action panel on the left of the window, this will open the **Document Templates** window.

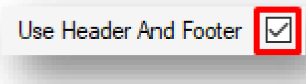


Select the appropriate **Document Module Type** from the drop-down menu that you wish this mail merge template to relate to.

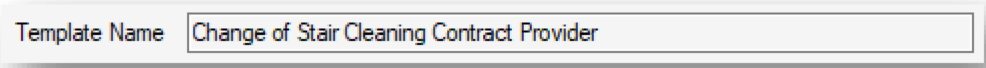
You can then select the **Document Type** which is a subcategory of the Document Module Type.

This will help you to find the document again when you come to use the **Document Distribution** tool in order to distribute your document.

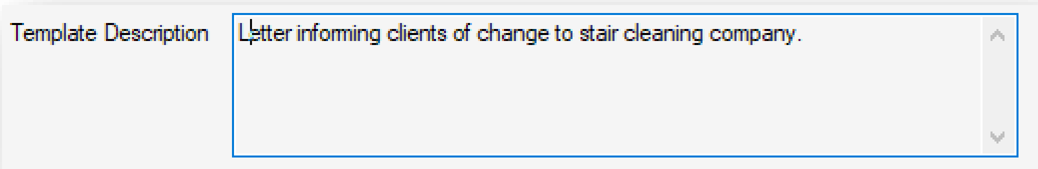
Select if the document has been set up to allow for printing onto paper which has a pre-printed header and footer. This will mean the document will leave space in the margins to allow for this.



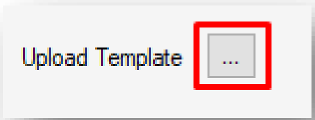
Type a name for your document in the **Template Name** field.



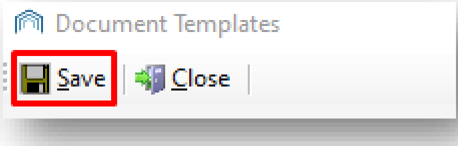
Type a description into the **Template Description** field to make your document easier to find.



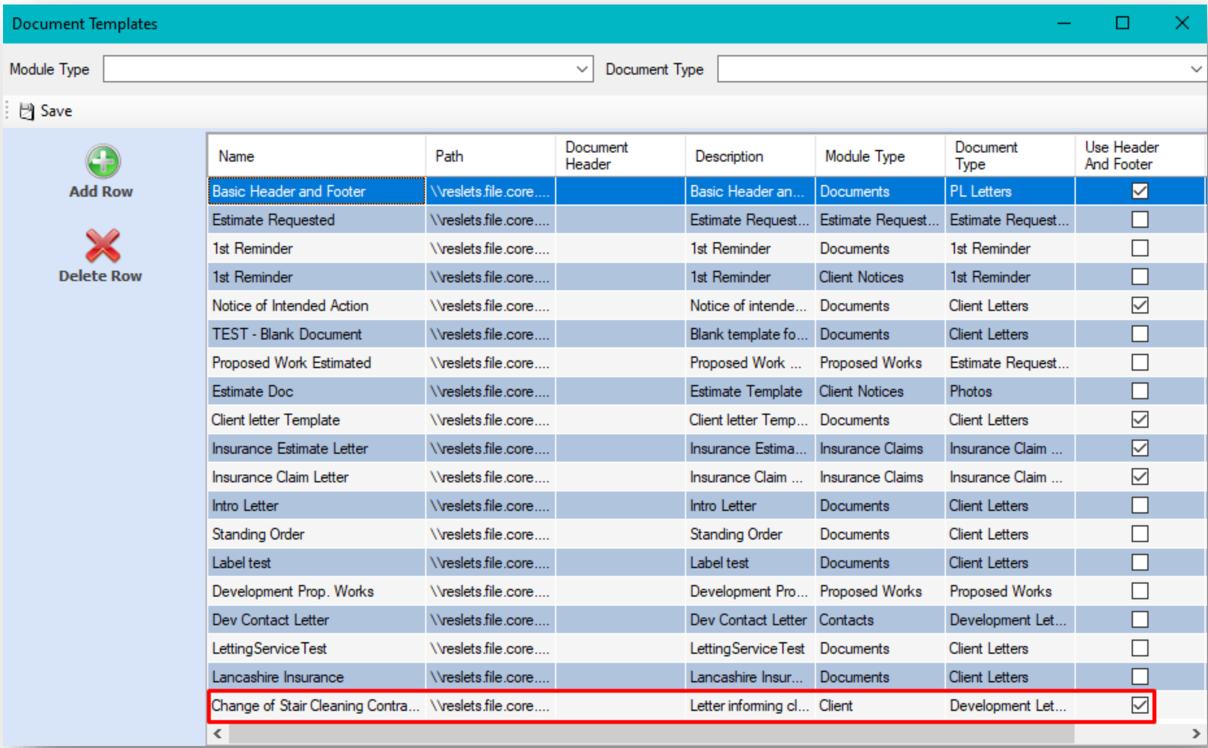
You can now click on the icon next to **Upload Template** in order to browse for and select your file to upload the mail merge template you previously created.



Once you have done this, you can click on **Save** in top-left of the Document Templates.



Your mail merge document has now been added as a template in CPL.

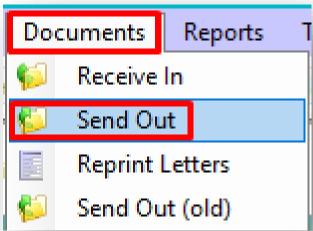


You can now click to close the **Document Templates** window.

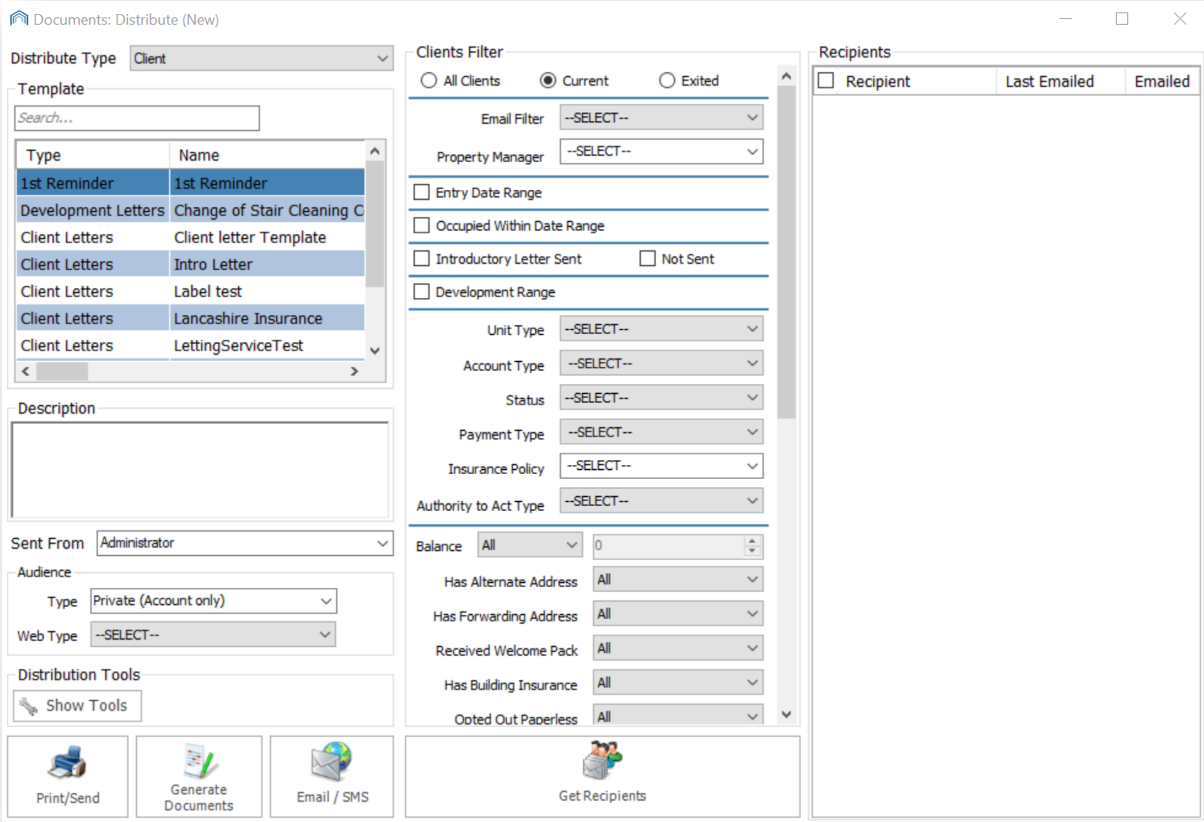
DISTRIBUTING YOUR MAIL MERGE TEMPLATE

Your mail merge template is now ready for everyone in your company to use.

In order to send out your document click on **Documents** in the top menu bar of CPL and choose **Send Out**.

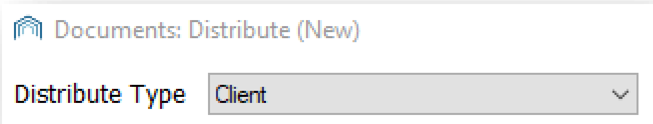


This will open the **Documents: Distribute (New)** window.

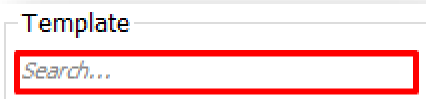


LOCATING YOUR TEMPLATE

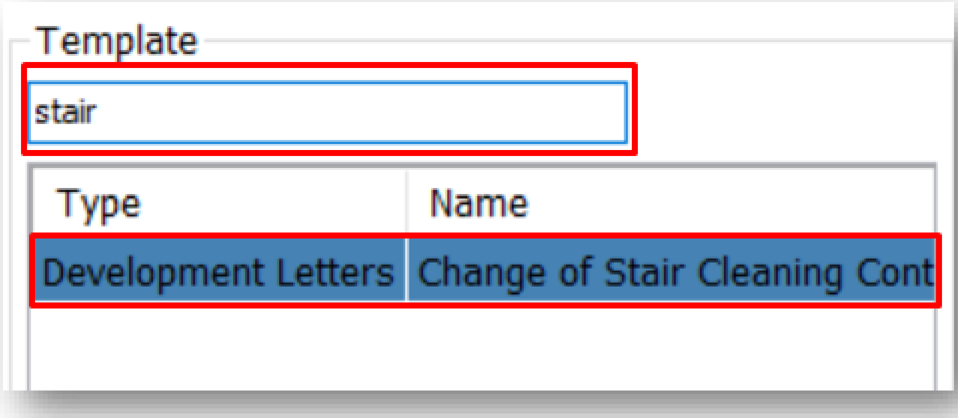
Select the appropriate **Distribute Type** for your template from the drop-down menu. This should match the **Document Type** you selected when you were saving the template.



If you can't immediately see the name of your template listed in the box, you may want to enter part of the **Template Name** you used when saving your template into the **Template Search** field to make it easier to find.

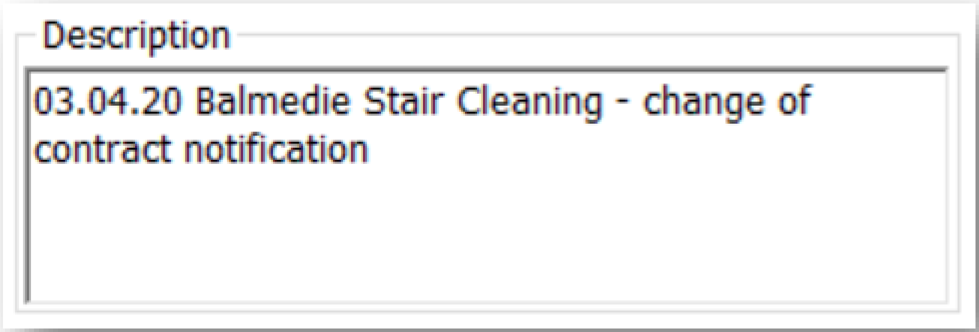


In this example the template was saved as **Change of Stair Cleaning Contract** and **stair** has been entered into the search box.

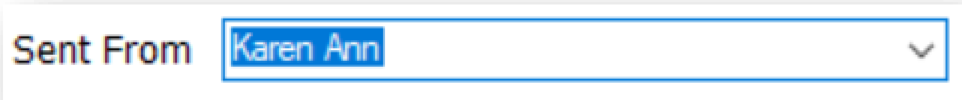


Click on the appropriate template to select it.

Enter a suitable description in the **Description** field.



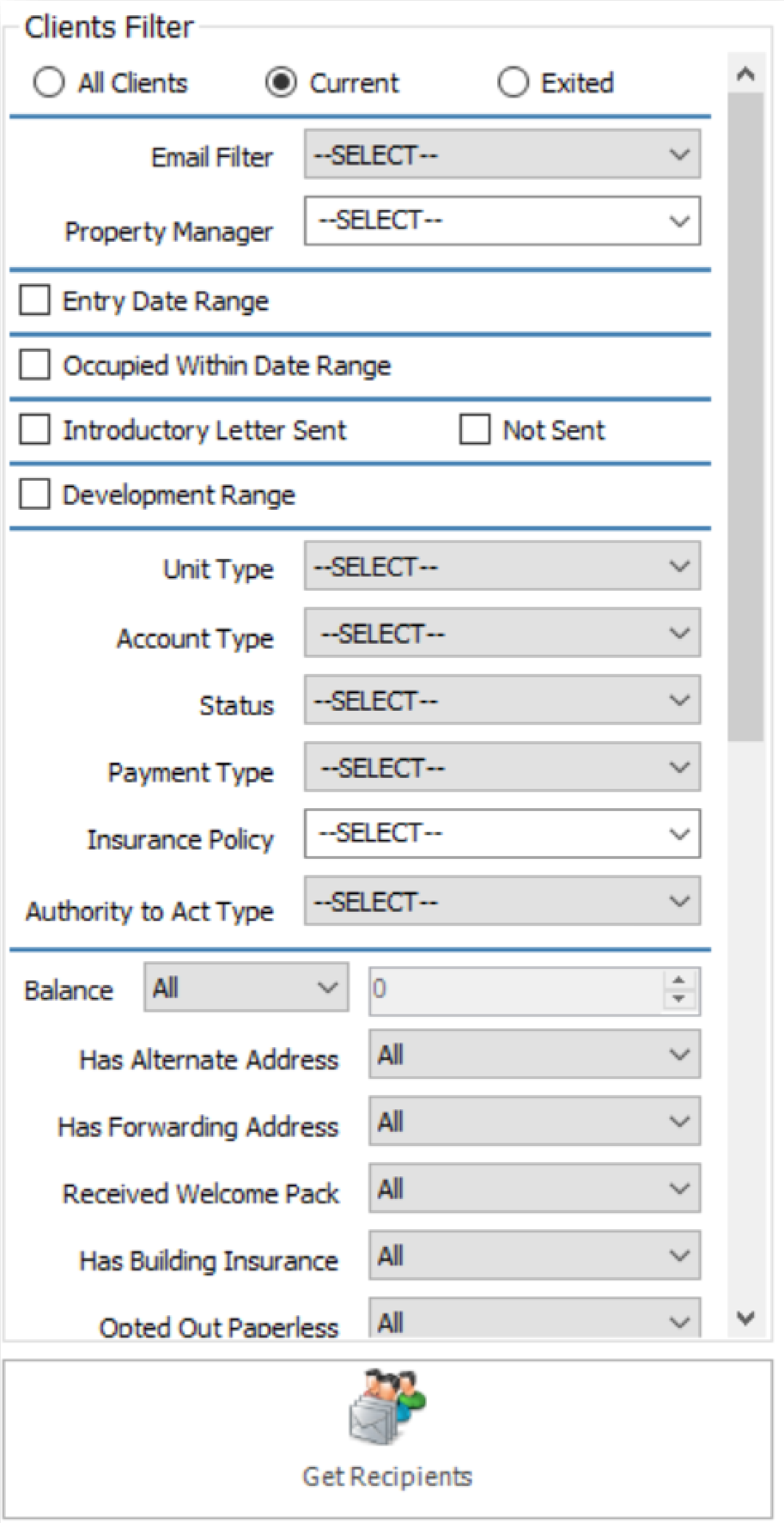
Decide which user you would like the communication to be sent from by choosing a CPL user from your company in the **Sent From** drop-down menu.



RECIPIENT FILTER

In the middle of the **Documents: Distribute (New)** window you will find the recipient filter appropriate to the communication you are sending out. This depends on what you have set as the **Distribute Type** for your communication.

In this example it is the **Clients Filter**.


Clients Filter
All Clients
Current
Exited
Email Filter
--SELECT--
Property Manager
--SELECT--
Entry Date Range
Occupied Within Date Range
Introductory Letter Sent
Not Sent
Development Range
Unit Type
--SELECT--
Account Type
--SELECT--
Status
--SELECT--
Payment Type
--SELECT--
Insurance Policy
--SELECT--
Authority to Act Type
--SELECT--
Balance
All
0
Has Alternate Address
All
Has Forwarding Address
All
Received Welcome Pack
All
Has Building Insurance
All
Opted Out Paperless
All
Get Recipients

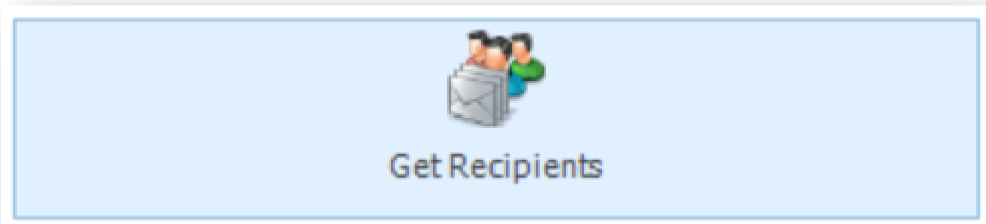
You will find multiple filter fields which provide you with options to select the appropriate clients who you would like to receive your mail merge communication. You can work you way through, using multiple filters to narrow down your search.

You can filter by:

- **All Clients/Current Clients/Exited** using the radio buttons at the top of the screen
- Whether they have **Email** or not,
- Which **Property Manager** deals with their development
- **Entry Date Range**
- **Occupied Within** a particular **Date Range**
- Whether they have been sent an **Introductory Letter** or not
- **Development Range**
- **Unit Type**
- **Account Type**
- **Status**
- **Payment Type**
- **Insurance Policy**
- **Authority To Act Type**
- The Clients Outstanding **Balance**
- If they have an **Alternate Address**
- If they have a **Forwarding Address**
- If they have **Received a Welcome Pack**
- If they have **Building Insurance**
- If they have **Opted Out** of **Paperless**
- Whether the development has a **Residents Association**
- Whether they are **Internal** or **External Clients**
- Whether they have **Opted In To Marketing**
- Whether they have a **Web User Account**
- If they are a **New Direct Debit Client**
- If they are due their **Introductory Paperless DD Letter**
- If they have an **Elevated DD Payment**

Depending on which filters you select you will see there are additional filters which appear to further narrow your search.

Once you have selected from the filters appropriate for your purpose, click on the **Get Recipients** button at the bottom of the screen.

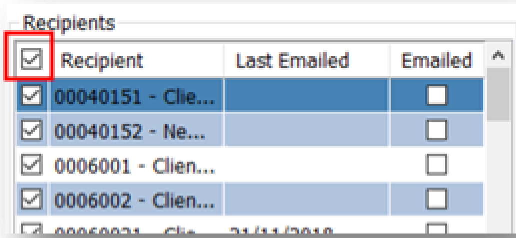


SELECTING RECIPIENTS

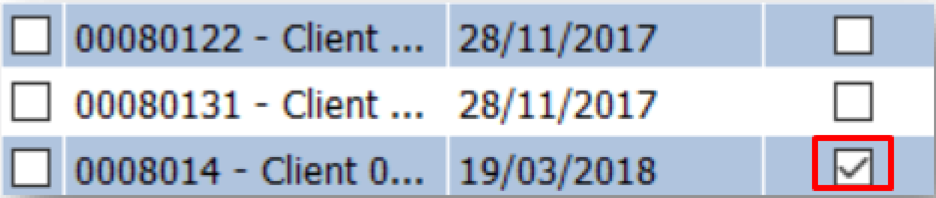
You will see a list of appropriate **Recipients** appear in the column to the right of the screen. These are generated by your choices in the filters you set.

In this example, these are clients generated by our choice of filters.

You can select all recipients who appear in the list by placing a tick in the tickbox at the top of the list or you can tick to select individual recipients.



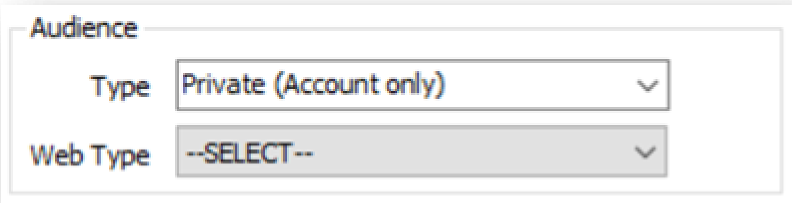
If your recipients have opted to receive their correspondence by email, you will see a tick in the box in the column on the right-hand side of the recipients list.



If there is no tick in this box then they have not opted for email and the communication will be printed in order to be posted out.

On the left of the **Documents: Distribute (New)** window there is a set of **Audience** filters. If you have not subscribed to a Client Web Portal and Client App with CPL, then please leave these set to **Type: Private (Account only)** and **Web Type: –Select—**

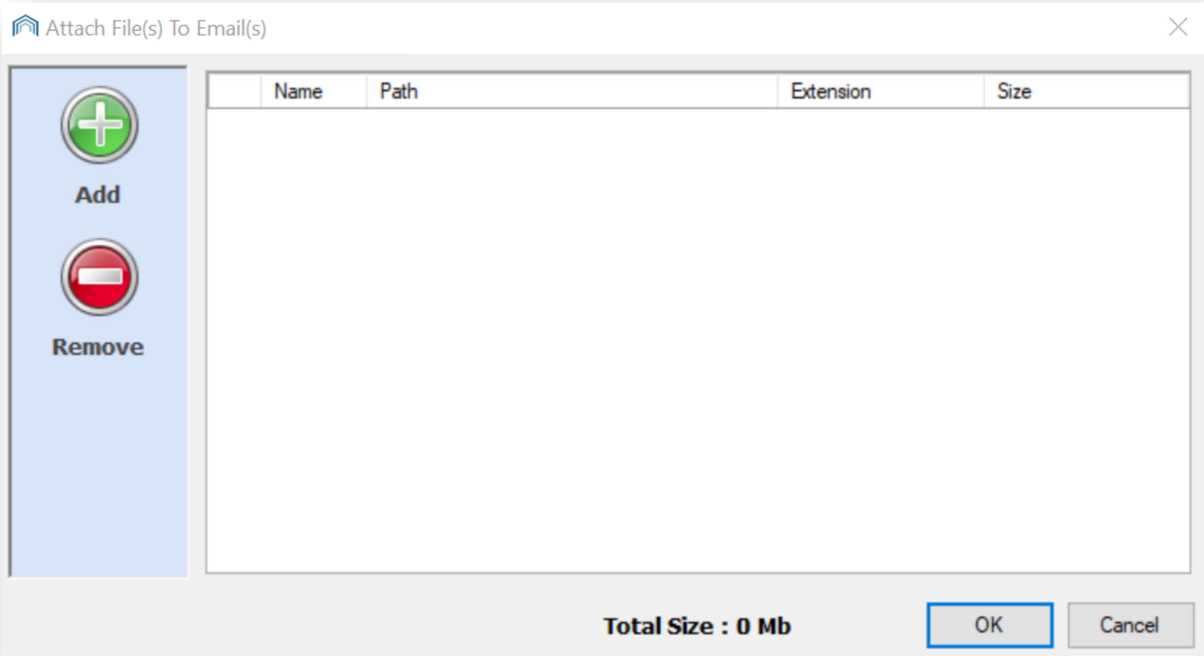
If you have subscribed to the Client Web Portal and Client App with CPL then you can use these to select how your communication will appear in these.



SENDING YOUR COMMUNICATION

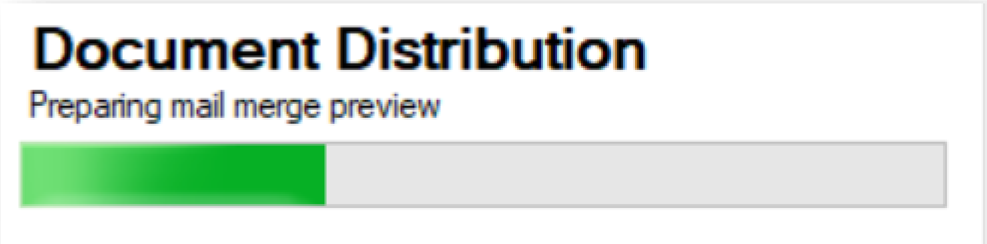
In order to generate the mail merges so that you can check them before you send them out to your recipients click the **Print/Send** button in the bottom left of the window.

You will see a pop-up screen asking if you would like to attach any files to emails which you are sending.

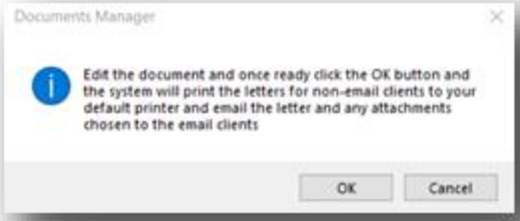


If you wish to do this click the **Add** button and attach any appropriate files. Click **OK** once you have done this or if you would like to proceed without attaching any files.

The system will pup-up a message with a progress bar letting you know that it is preparing your mail merge preview.

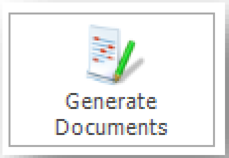


The system will now open **Word** for you and display your merged results. Check the information is correct and click **OK** in the **Documents Manager** pop-up window which appears, without closing Word.

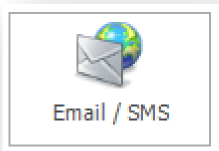


If these mail merge results meet your requirements, accept them and CPL will then email your mail merges to the recipients you selected and/or it will print out copies for you to send.

Please note that clicking on the **Generate Documents** button will add the document to the documents area for whatever recipients you have selected but will not print or email the document.



Clicking on the **Email/SMS** button will have no effect unless this is set up for your system.



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).

APPENDIX

MAIL MERGE FIELDS IN CPL

The following list details ALL merge fields available in CPL along with a short description to help you to decide which ones you would like to use in your mail merge documents.

Where the merge field is labelled as Not Used, these fields will not be relevant for your documents.

For further information on using these fields, please see the Mail Merge Training Guide.

BUYER/SELLER LETTERS:

uvw_MMBuyerSeller	
Field	**Description**
gCID	Not Used
MergeDate	Date document was created
NextClient	next client (client moving in)
PreviousClient	previous client (client moving out)
sCAccountNo	Client Account Number
sClientName	Client Name
sCNo	Number of owners property has had

CPL SOFTWARE

CLIENT DETAILS:

uvw_MMClientDetails	
Field	**Description**
AdvanceChargeAmount	advance charge amount
AppOrPSumInsured	Not Used
ApportionMembers	Not Used
ApportionmentRate	Not Used
ApportionmentSumInsured	Apportionment relating to the sum insured
ApportionNotes	any notes or description of the apportionment
AuthorityToActType	type of authority to act on behalf of owner
Bank Account No	client bank account number
Bank Account Sort Code	client bank account sort code
BankCode	code of bank
BlockAddress	address of the block
BlockAppFee	the apportionment fee for a block
BrokerName	name of insurance broker
BrokerNumber	Number for insurance broker
BuildingIPT	building insurance premium tax rate
BuildingRate	building insurance rate
ClsIntroPackSent	has introductory letter been sent
ClientAccountNumber	client account number
ClientAddress	client address
ClientAddress_All	full client address formatted top to bottom
ClientBalance	client balance
ClientBillingAddress	client billing address
ClientBillingPostcode	client billing postcode
ClientCreditStatus	client credit status
ClientDescription	description field on client record
ClientEmail	client email address
ClientEmailDocuments	client email address preference for documents
ClientEmailInvoices	client email address preference for invoices
ClientEntryDate	date client entered property
ClientExitDate	date client exited property
ClientFloatPaid	whether client has paid float
ClientForwardAddress	client forwarding address
ClientForwardAddress_All	full client forwarding address formatted top to bottom
ClientForwardPostcode	client forwarding address postcode
ClientGarageSpaceNo	number for client garage space
ClientInsuranceDateAdvisement	date client advised of insurance claim
ClientLineAddress	client address in single line
ClientName	client name
ClientNo	Number of clients in the property
ClientNoteOfInterest	note of interest field on client record.
ClientOwnerSellingGracePeriod	Not Used.
ClientPaymentType	Client payment type registered on the client account screen

ClientPhone	Default client phone number
ClientPhoneDescription	Description of default client phone number
ClientPostcode	Client postcode
ClientURN	Client unique reference number
ColloquialName	Client colloquial name
CompanyNo	Company telephone number
DAddress	Development address
DAsbestos	Whether Asbestos Present is ticked on the Development Master screen
DAsbestosDesc	Asbestos description from the Development Master screen
DPlans	Whether Plans Held is ticked on the Development Master screen
DDeeds	Whether Deeds Held is ticked on the Development Master screen
DDescription	The Development Description from the Development Master screen
DIsFloatRecoverable	Is the client Float Recoverable? (Development level flag)
DInspector	Development Inspector or Property Manager
gPID	Not Used
gDID	Not Used
IPNumber	Insurance Policy Number
IPolicyCode	Insurance Policy Code
IPolicyDescription	Insurance Policy Description
IPolicyCompany	Insurance Policy Company
INextRenewalDate	Insurance Policy Next Renewal Date
IExcess	Insurance Policy Excess
ISumInsured	Insurance Policy Sum Insured
ITotalAppInsur	Total Apportion Insurance Amount
ITotalAppValuation	Insurance Policy Total Apportionment Valuation
PreviousSumInsured	Insurance Policy Previous Sum Insured
SumInsuredDifference	Insurance Policy difference between current and previous sum insured
PreviousPremium	Previous Insurance Premium
PremiumDifference	Insurance Policy difference between current and previous premium
IRate	Insurance Policy Insurance Rate
InsuranceExcessMemo	Insurance Policy Details of Insurance Excess Memo if set
DDAmount	Current Direct Debit Amount from the Client Account screen
DDNextDate	Next DD Collection Date
DDRunTimesLeft	Number of Run Times left for the DD to run from the Client Account screen
DDOffPayAmount	DD One Off Payment Amount from the Client Account screen
DDFirstPayComplete	Not Used
DDOffPayComplete	Not Used

DDOffPayDate	Not Used
NormalDDMonthlyPayment	Normal DD Monthly Payment Amount
ElevatedDDPayment	Elevated DD Payment Amount
DDSwitchoverDate	Switchover Date set on Client Account Bank Information
DDBankName	DD Bank Name from the Client Account Bank Information
DDAccountName	DD Account Name from the Client Account Bank Information
DDSortCode	DD Sort Code from the Client Account Bank Information
DDAccountNumber	DD Account Number from the Client Account Bank Information
DDMaskedAccountNumber	DD account number with digits masked with x's
DDMaskedSortCode	DD sort code with digits masked with x's
UserName	Name of Currently Logged On User from their Amend User screen
SignatureFilePath	Will Insert Image of Signature if file path is entered in the current user's User Information
DDIPhoneNumber	Direct Dial Phone Number of Currently Logged On User from their Amend User screen
JobTitle	Job Title of Currently Logged On User from their Amend User screen
UserID	User ID of Currently Logged On User from their Amend User screen
UserEmail	Email Address of Currently Logged On User from their Amend User screen
InspectorDDI	Direct Dial Phone Number of Inspector/Property Manager listed on the Client's Development from the Inspector's Amend User screen
InspectorName	Name of Inspector/Property Manager listed on the Client's Development from the Inspector's Amend User screen
InspectorJobTitle	Job Title of Inspector/Property Manager listed on the Client's Development from the Inspector's Amend User screen
InspectorEmail	Email Address of Inspector/Property Manager listed on the Client's Development from the Inspector's Amend User screen
InspectorSignaturePath	Will Insert Image of Signature if file path is entered in the Inspector/Property Manager listed on the Client's Development Amend User screen
MergeDate	Short form of date when mail merge is processed
MergeDateFull	Full form of date when mail merge is processed
ValuationAmount	Development Insurance Apportionment Valuation Amount
ValuationDate	Date entered for Apportionment Valuation

BuildingRate	Building Rate selected in Development Policy Details tab
BuildingIPT	Insurance Policy Building IPT Rate
TerrorismRate	Insurance Policy Terrorism Rate
TerrorismIPT	Insurance Policy Terrorism IPT Rate
TerrorismTotal	Total Terrorism Rate
Rate3	Insurance Policy 3rd Rate if entered against policy
Rate4	Insurance Policy 4th Rate if entered against policy
TaxRate	Insurance Tax Rate
TotalRate	Insurance Total Rate
ApportionmentRate	Insurance Policy Total Apportionment Rate Set for a Development
SubTotalRate	Total Insurance Premium before IPT
TotalRateLessTerrorism	Total Insurance Rate less Terrorism Amount
FinalNoticePreviousBalance	Used for user created reminder documents – client previous balance
FinalNoticeCurrentBalance	Used for user created reminder documents – client current balance
FinalNoticeDAmount	Not Used
FinalNoticeFloatDue	Not Used
FinalNoticeBalanceDue	Not Used
LastInsuranceTransactionAmount	Not Used
CompanyNo	Company VAT no
ProRataBuildingRate	Pro-rated buildings premium for client
ProRataTerrorismRate	Not Used
ProRataRate3	Not Used
ProRataRate4	Not Used
ProRataTaxRate	IPT Tax pro-rated for client
Total Premium	Total Insurance premium for client
Insurance Interest	Insurance Interest Rate if listed on Insurance Policy
InsurancePolicyCommission	Insurance Commission Rate if listed on Insurance Policy
ProRataSubTotal	Pro-rated insurance total before IPT
DevelopmentInsuranceExcessMemo	Insurance excess note on Development insurance policy
ApportionmentSumInsured	Sum Inured Total for Apportionment for Development Block Insurance Policy
NeoPostAccountNo	Not Used
OfficeCode	Office Code if listed on Development Master screen
OfficeName	Office Name if listed on Development Master screen
PostType	Not Used
DDFrequency	DD Frequency set on Client Account screen
DDNextCollection	Next Collection Date set on Client Account screen

DDBankRef	Bank Reference from the Client Account Bank Information
AdvanceChargeAmount	Not Used
Date_Next_Adjustment	Not Used
Recommended_Installment_Amount	Not Used
ApportionMembers	List of Clients apportions and shares where flagged for 'show on mail merge'
ApportionNotes	List of client's Apportionment notes where flagged for 'show on mail merge' from the Development Apportionments tab
BankCode	Bank code for the Development bank
BankAccountNo	Bank Account Number from main Client Account screen
BankAccountSortCode	Bank Account Sort Code from main Client Account screen
InspectorFirstName	First Name of Inspector/ Property Manager for Client's Development
Unit Type	Client's Unit Type set on Property
PolicyStartDate	Insurance Policy Start Date
DAuthorityToAct	Authority to Act information if entered on Development Master screen
AuthorityToActType	Instructing Authority information if entered on Development Master screen
StandingOrderCollectionAmount	Client's Standing Order Collection Amount
StandingOrderAccountName	Bank Account name set for client's Standing Order
StandingOrderPreviousAmount	Previous amount being collected by standing order.
BrokerNumber	PL Account Code if broker entered in Development Insurance Policy
BrokerName	PL Account Name if broker entered in Development Insurance Policy
PLClaimsNumber	PL Account number for the PL Account linked for claims on the Development Buildings Insurance policy
PLClaimsName	PL Account name for the PL Account linked for claims on the Development Buildings Insurance policy
Notes	Not Used
WebPassword	Not Used
FixedPremium104	Not Used
DIReference	Reference recorded on the Developments Building Insurance record.
POLPolicy	Name of Property Owner's Liability Insurance Policy
POLPremium	Premium Amount for Property Owner's Liability Insurance Policy
DevelopmentInsuranceNotes	Insurance Notes entered on the individual insurance policy for the Development.
DevelopmentChargeDateCodeDescription	Description for the Charge Date Code selected for the client's development.

AppOrPSumInsured	Whether an Apportionment or the Property Sum Insured is being used for the Insurance Policy.
NextRenewalDateFull	Full date of next insurance policy renewal date
DateOfInstruction	Date of Instruction if entered on the Development Master screen
InstructingAuthority	Any text added to the Instructing Authority field on the Development Master screen
SinkingFundSummary	Lists all of the Contingency Funds set up for that client, amount, share and frequency.
NOPLDevelopmentTotalDebt	This will calculate and display the total debt summed from each current client on an active NOPL.
NOPLCount	This is the number of properties (with current clients) within the development with an active NOPL.
DevelopmentBalance	This is the current balance for the whole Development.
DevelopmentFloatHeld	This is the total Float Held across all clients in the Development.
DevelopmentBalanceLessFloatHeld	The current development balance minus the total floats held.
PlanetPressCode	Relevant for one customer only
PlanetPressEmail	Relevant for one customer only

CLIENT INSURANCE LETTERS:

uvw_MMClientInsurance	
Field	**Description**
AlternativeAddress	alternative address for client
AlternativePostCode	alternative postcode for client
bHasEmail	Does user have email available?
bIsEstimateRequestSentByEMail	indicates if client receives insurance estimates via email
bIsEstimateRequestSentByPrint	indicates if client receives insurance estimates via printed medium
bIsInvoiceReceived	Does client receive invoices?
ClientAccountNumber	client account number
ClientAddress	client address
ClientColloquialName	client colloquial name
ClientLineAddress	client address in single line format
ClientName	client name
ClientPostCode	client postcode
ContactName	contact name
ContactPhone	contact phone number
dCreatedDate	date of document creation
dIntimation	date insurance company was informed of an incident
dLossDate	date the loss occurred
gApportionID	Not Used
gCID	Not Used
gCreatedUser	Not Used
gDevID	Not Used
gICID	Not Used
gInsurancePolicyID	Not Used
gPropertyID	Not Used
iClaimNo	insurance claim number
iClaimStatusID	status of an insurance claim
iExcess	insurance excess
InsuranceReference	claim reference
iPerilID	name of the peril type
isPrinted	signifies that the claim notice has been printed
iSumInsured	the sum insured value
MergeDate	date a document is merged
Reference	crime reference for insurance claim
sDescription	description from insurance claim
sEmail	email address for the property owner
sOwnerAddress	property owner address
sOwnerName	property owner name
sPCode	postcode for the property
sPCompany	insurance policy company name
sPDescription	insurance policy description
sPNumber	insurance policy number
sPostCode	property postcode from insurance claim

CLIENT NOTICES:

uvw_MMClientNotices	
Field	**Description**
BalanceDue	the balance due
BatchNo	batch number for client notices run
ClientAccountNumber	client account number
ClientColloquialName	client colloqial name
ClientEmailDocuments	Does the Client have an email address flagged as Used For Invoice
ClientForwardAddress	forwarding address listed for client
ClientForwardAddress_All	address all client mail should be sent to
ClientForwardPostCode	forwarding postcode for client
ClientName	client name
ClientURN	Client unique reference number
CurrentBalance	the current client balance
DDAccountNumber	Client Direct Debit account number
DDSortCode	Client Direct Debit Sort Code
DevName	Development name
DevNo	Development number
DisputedAmount	disputed amount
EmailAddress	First email address for the Client that's flagged as Used For Invoice
FloatDue	float due
FullBalanceDue	Full balance due
gCID	general client ID (not client account number)
MergeDate	date a document was created
NeoPostAccountNo	Not Used
NoticeType	Client Notice type
PostType	Not Used
PreviousBalance	previous client balance
PropertyLineAddress	property address in single-line format
Recommended Installment Amount	recommended installment amount
sMailMergeCode	Picks up which office deals with the Development - if set
TelephoneNumber	client telephone number
TotalCurrentBalance	total current balance

DEVELOPMENT CONTACT DETAILS:

uvm_MMDevContactDetails	
Field	**Description**
bHasEmail	whether development contact has email
ContactAddress	development contact address
ContactEmail	development contact email
ContactName	development contact name
ContactPhone	development contact phone
ContactPhoneDescription	description of development contact phone entry
ContactPostcode	development contact postcode
DAddress	address for development contact
DLineAddress	development contact address in single line format
DName	development name
DNumber	development number
DPostcode	development postcode
gDevContactID	Not Used
MergeDate	date document is merged

ESTIMATE REQUEST:

uvw_MMEstimateRequest	
Field	**Description**
bHasEmail	whether client has email
DevelopmentAddress	address of Development
DevelopmentName	name of Development
DevelopmentNumber	number of Development
DevelopmentPostcode	postcode for Development
EmailAddress	First email address for the Client that's flagged as Used For Invoice, 'N/A' if none
EstimateAmount	amount contractor quoted for job
EstimateCreationDate	date you created the estimate
EstimateDuration	expected duration of the job from the contractor
EstimateExpiryDate	date estimate will expire
EstimateName	name given to estimate
EstimateNumber	number generated for estimate
EstimateRequest	the details of the Request as entered on the Estimate screen
EstimateType	type of estimate requested
gERID	Not Used
gEROID	Not Used
MergeDate	date document is being merged
MergeDateFull	Full form of date document is being merged
NumberofBlocks	number of blocks in development
NumberofProperties	number of Units from the Developments table
PLAccountName	Purchase Ledger account name
PLAccountNumber	Purchase Ledger account number
PLAddress	Address of PL account
PLColloquialName	Colloqial name for PL account
PLContactName	contact name for PL account
PLEmailAddress	email address for PL account
PLPaymentAddress	address for PL account for payment
PLPaymentPostcode	postcode for PL account for payment
PLPostCode	Address for PL account
PropertyManagerName	name of Property Manager
QuoteState	overall quote status (Population, Requested etc)
RequestState	status of the individual request to a PL Account
WarrantyName	name of the warranty
WarrantyNumber	number of warranty

PURCHASE LEDGER DETAILS:

uvw_MMPLDetails	
Field	**Description**
bEmailOrders	Not Used
EmailAddress	PL Account email address
EmailOrders	can PL Account receive email orders
gPAIID	Not Used
MergeDate	date mail merge document is created
MergeDateFull	full date with month in letters mail merge document is created
PLAccount	Purchase Ledger Account name
PLAddress	Purchase Ledger Account address
PLAddressPostCode	Purchase Ledger Account postcode
PLCISExpireDate	PL Account's CIS expiry date
PLColloquialName	Purchase Ledger Account contact colloquial name
PLContactName	Purchase Ledger Account contact name
PLContractor	whether PL Account is set as a contractor in CPL
PLGraceDays	number of grace days before individual contractor requires payment
PLHealthSafetyDate	date PL Account's health and safety certificate expires
PLHealthSafetyReceived	whether a health and safety certificate has been submitted for approval
PLInsuranceExpireDate	PL Account's public liability insurance expiry date
PLName	Purchase Ledger Account name
PLPaymentAddress	Purchase Ledger payment address
PLPaymentPostCode	Purchase Ledger payment postcode
PLPaymentType	payment type (cheques, BACS or manual) set on PL Account
PLStatus	Purchase Ledger Account status (Normal or Stopped)
PLVATRegistration	Purchase Ledger Account VAT Registration number

PROPOSED WORKS:

uvw_MMProposedW orks	
Field	**Description**
ApportionmentValue	Apportionment value per client for proposed works
bEmailInvoices	Not Used
bHandoverDeleted	Not Used
BlockAddress	address of block
ChargeBalance	client charge balance
ClientForwardAddress	client forward address
ClientForwardPostcode	client forward address postcode
ClientLineAddress	client address in single line
ClientOutstanding	Outstanding balance of client
ClientPaid	amount a client has paid towards proposed work
ClientPayable	amount due from client in proposed work
ContactNo	Onsite development contact number
ContractorAccountNo	contractor account number
ContractorName	name of contractor
CPaymentType	client payment type (cash/ cheque/ BACS)
CreatedUser	user who created Mail Merge
CreatedUserEmail	email address of user who created the Mail Merge
CurrentBalance	current balance for proposed work paid in by clients
dCreated	date proposed work was created
DDIPhoneNumber	Direct Dial number for user who is creating the mail merge
dEntryDate	date client entered property
dExitDate	date client exited property
dInsuranceDateAdvisement	date an insurance advisement was made
dNextCollection	Not Used
dOffPaymentDate	date payment was made
EAE	estimated annual expenditure
FloatBalance	balance of float
fReceivedAmount	received amount for proposed work
fTargetAmount	target amount for job to go ahead
gApportionmentID	Not Used
gBlockID	Not Used
gCID	Not Used
gDevelopmentID	Not Used
gDID	Not Used
gJobType	Not Used
gPID	Not Used
gProposedWorksID	Not Used
gVatRate	Not Used
iAccountNumber	client account number
iCollectionAmount	collection amount
iCreditControlStatusID	client credit control status
iDGen	Not Used
iJobID	Job Number
iJobTaskNo	task number for job

iNoOfTimesToRun	how many times direct debit will be run
InspectorDDI	inspector/ property manager direct dial phone number
InspectorEmail	email address of inspector/ property manager
InspectorJobTitle	job title of inspector/ property manager
InspectorName	name of property inspector/ property manager
InspectorSignaturePath	Will Insert Image of Signature if file path is entered in the Inspector/ Property Manager listed on the Client's Development Amend User screen
iOffPaymentAmount	one-off payment amount
iPaymentTermsCheque	whether cheque cashed on approval of job or receipt of the cheque
iPaymentTermsID	payment terms
iPGen	Not Used
iProposedWorksNo	Number for Proposed Work in CPL
iSortCode	Bank sort code
iStatusID	status of job related to proposed work
JobTitle	title of job related to proposed work
MergeDate	date mail merge document is created
MergeDateFull	date with month in letters mail merge document is created
NeoPostAccountNo	Not Used
OfficeName	Office name development is associated against
PayableAmount	amount payable for proposed work
pFloat	Not Used
PostType	Not Used
PropertyRate	Not Used
PWID	Proposed Work ID
Rate1	Insurance rate 1
Rate2	Insurance rate 2
Rate3	Insurance rate 3
Rate4	Insurance rate 4
RateID	Name of the rate
sBankName	Not Used
sCAccountNo	Contractor Account Number
sCAddress	Contractor Address
sCDescription	Contractor Description
sCEmail	Contractor Email
sClientAccountName	client account name
sClientName	client name
sClientPaymentTypeCode	code which represents
sCNo	Contractor number
sColloquialName	client colloquial name
sCPostCode	Contractor postcode
sDesc	Description
sDName	Development Name
sGarageSpaceNo	client garage space number
SignatureFilePath	Will Insert Image of Signature if file path is entered in the Amend User screen for this user
sNoteInterest	Not Used
sPAddress	Address

sPostalCode	Postcode
sProposedWorksDescription	description of proposed works
sProposedWorksName	name of proposed works
sStatusCode	status code for proposed work
sStatusDescription	status description for proposed work
Status	status of the job
sType	type of job
tFloat	Not Used
TwoWeekDate	Not Used
URN	client unique reference number
UserEmail	client email for web portal
UserID	client user ID for web portal
UserName	client username for web portal