



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

THE CPL RESOURCE CENTRE

TRAINING GUIDE

DEC 2020

Version 1.0



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INTRODUCTION

CPL has an empty library where you can store any resources you might want your team to access from CPL. These can be files or URL's linking you to resources on the web.

To keep your Resource Centre organised you might want to add any categories you would like for organising the storage of your documents/ files and URLs.

ADDING RESOURCE CATEGORIES

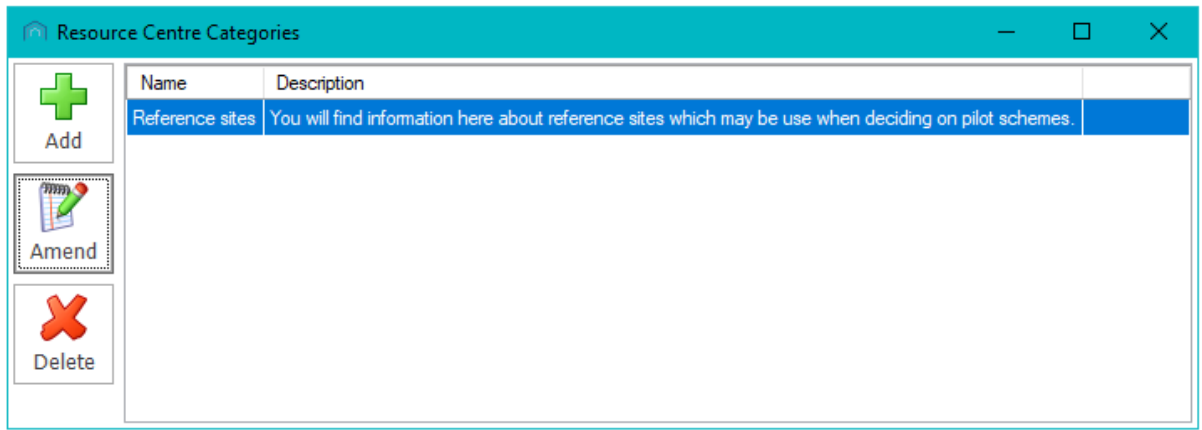
Under **System Parameters**

To access this option, click on **System** in the main CPL menu bar at the top of the screen.

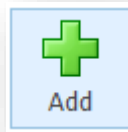
In the menu which appears, click on **System Parameters** and then in the next drop-down menu click on **Resource Categories**.



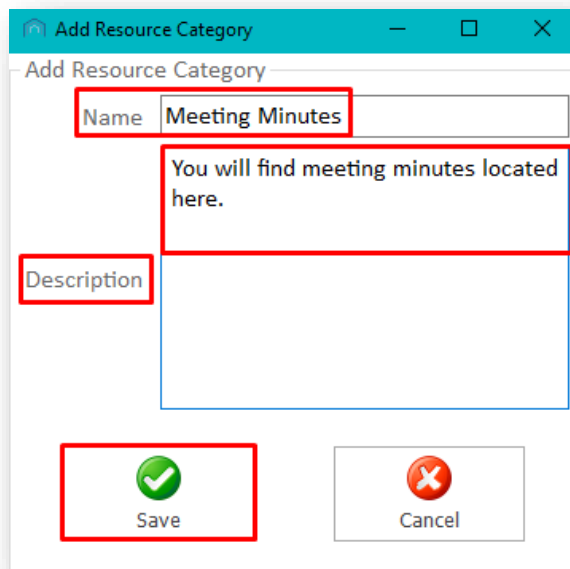
This will open the **Resource Centre Categories** window.



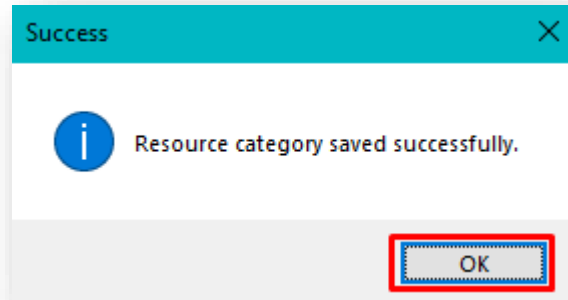
To add a **Category**, click on the **Add** button in the action bar on the left.



This will open the **Add Resource Category** window where you can add a **Name**, a **Description** and click on the **Save** icon to add this to your resource centre. The description is optional.



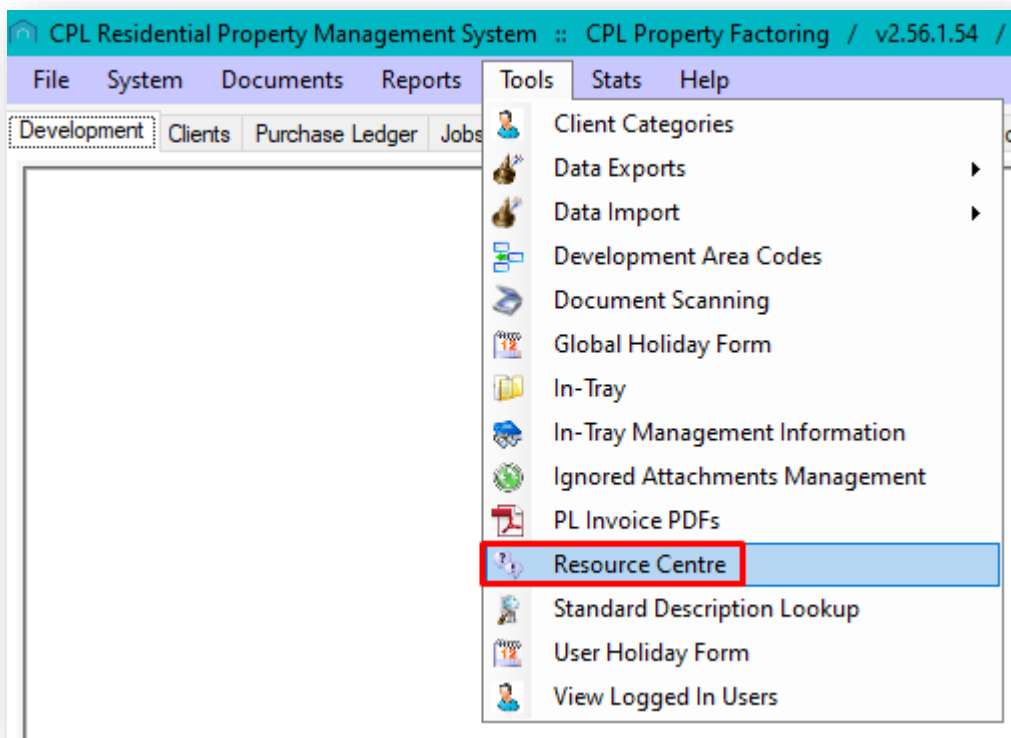
Upon clicking the **Save** icon you will be presented with a **Success** pop-up window to confirm that this category has been created.



ACCESSING THE RESOURCE CENTRE TOOL

The Resource Centre itself is accessed from the main **Tools** menu in CPL.

You can both add and view resources from in here as long as you have the correct permissions to do so.



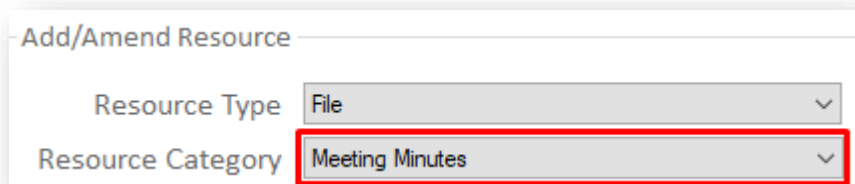
ADDING A RESOURCE – ADDING A FILE

To add a resource, click on the **Resource Type** drop-down menu option and choose whether you are adding a **File** or a **URL**.



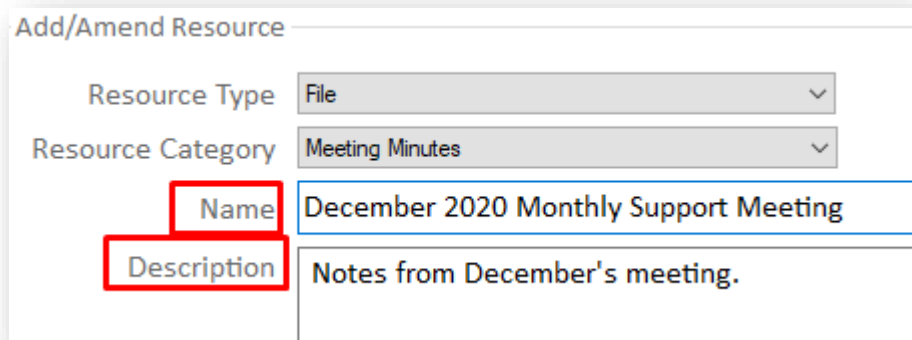
The screenshot shows the 'Add/Amend Resource' form. The 'Resource Type' dropdown menu is highlighted with a red box and is set to 'File'.

Choose the **Resource Category** you would like this file to be assigned to.



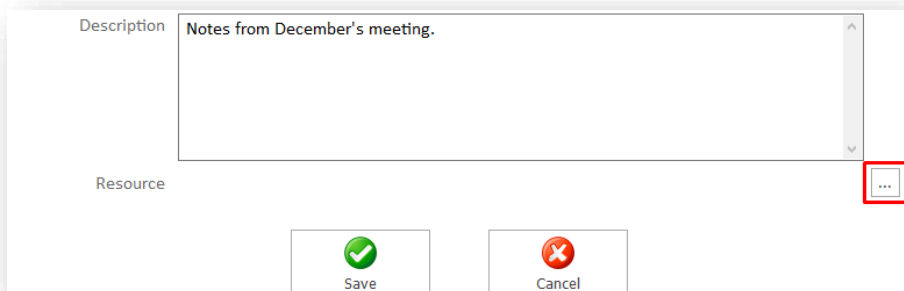
The screenshot shows the 'Add/Amend Resource' form. The 'Resource Type' is set to 'File' and the 'Resource Category' dropdown menu is highlighted with a red box and is set to 'Meeting Minutes'.

Add a **Name** for your resource, along with an optional description.



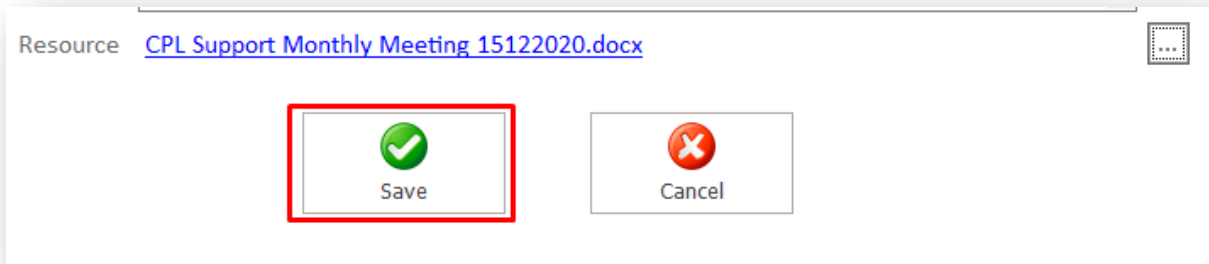
The screenshot shows the 'Add/Amend Resource' form. The 'Resource Type' is set to 'File' and the 'Resource Category' is set to 'Meeting Minutes'. The 'Name' field is highlighted with a red box and contains the text 'December 2020 Monthly Support Meeting'. The 'Description' field is also highlighted with a red box and contains the text 'Notes from December's meeting.'.

Click on the button on the right containing the three dots to browse for your file.

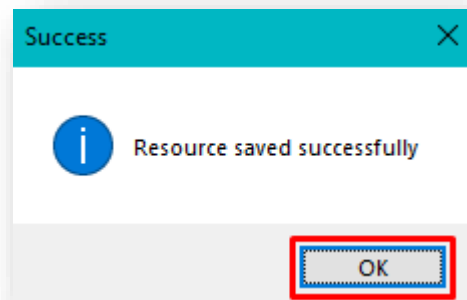


The screenshot shows the 'Add/Amend Resource' form. The 'Description' field contains the text 'Notes from December's meeting.'. The 'Resource' field is empty, and a button with three dots is highlighted with a red box. Below the form are 'Save' and 'Cancel' buttons.

Once your resource is uploaded and the file name is appearing in the window, you can click on the **Save** icon to add this.



Once the file has been added you will see a **Success** pop-up notification.



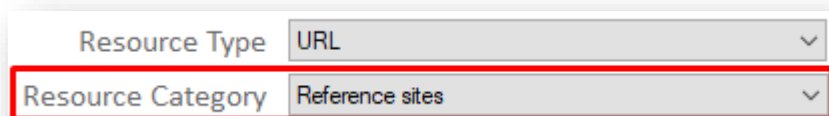
Clicking on **OK** will dismiss this message.

ADDING A RESOURCE - ADDING A WEB LINK

To add a web resource, click on the **Resource Type** drop-down menu option and select **URL**.





Next, select the appropriate **Resource Category** for this web resource.



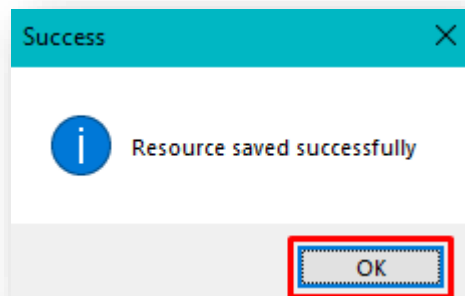
Add an appropriate **Name** and optional **Description** to suit your purposes.

Name	ARMA Website
Description	The Association of Residential Managing Agents

Finally, paste the web address into the **Resource** field and click on the **Save** option.

Resource	https://arma.org.uk/
<div style="display: inline-block; border: 1px solid red; padding: 5px; margin-right: 20px;"> Save</div> <div style="display: inline-block; border: 1px solid gray; padding: 5px;"> Cancel</div>	

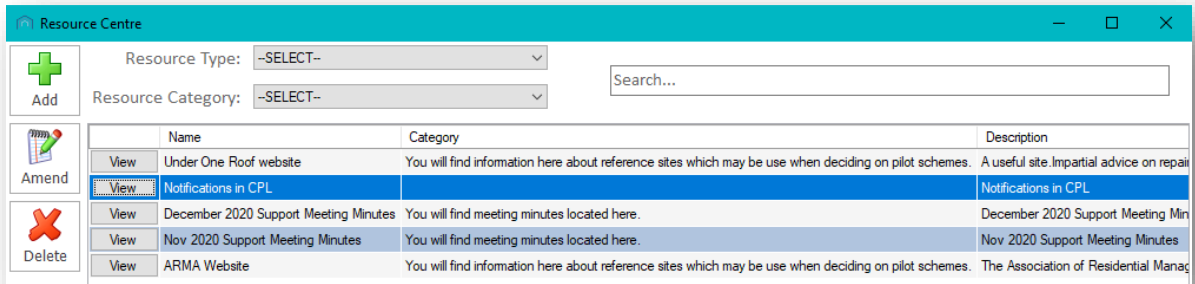
Once the URL has been added you will see a **Success** pop-up notification.



Clicking on **OK** will dismiss this message.

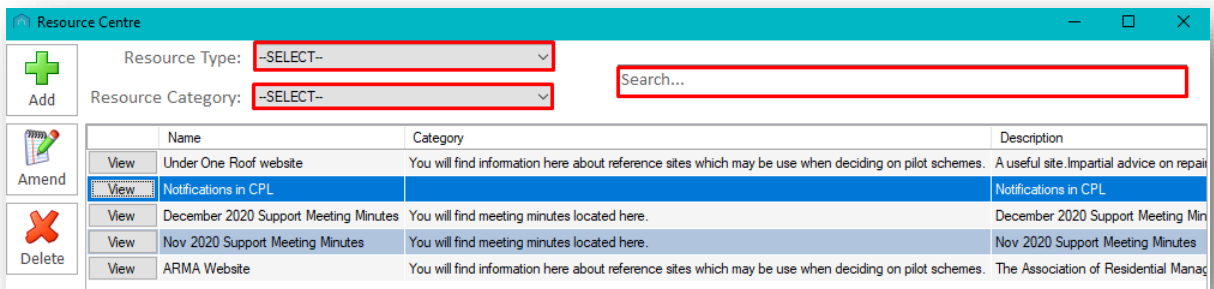
VIEWING RESOURCES

This will open the **Resource Centre** window which will list all resources which have been added.

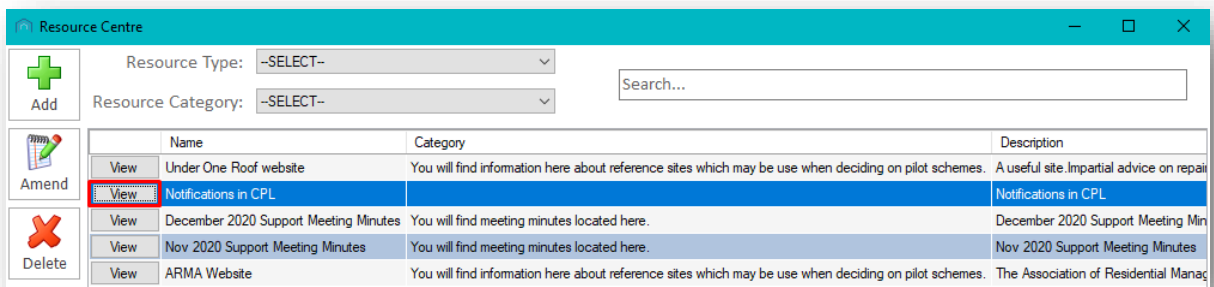


You can filter for resources by **Resource Type** or the **Resource Category** options.

You can also use the **Search** box to find a resource.



To view resources, you can click the **View** option in the main list

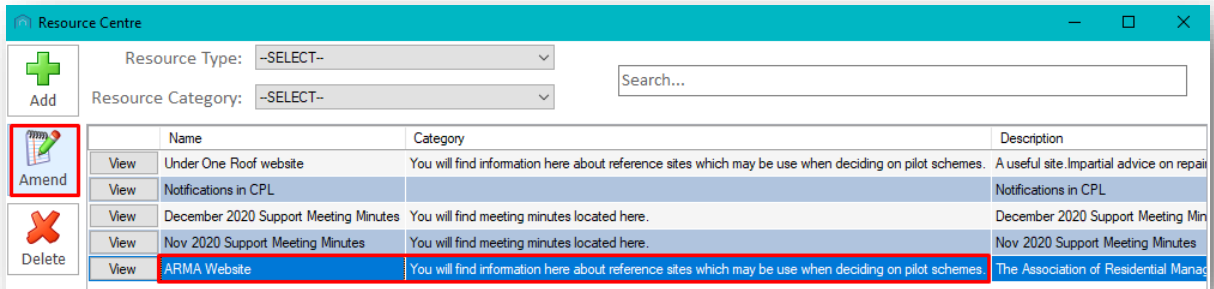


If you are clicking to view a URL then it will open the resource on your default browser for you.

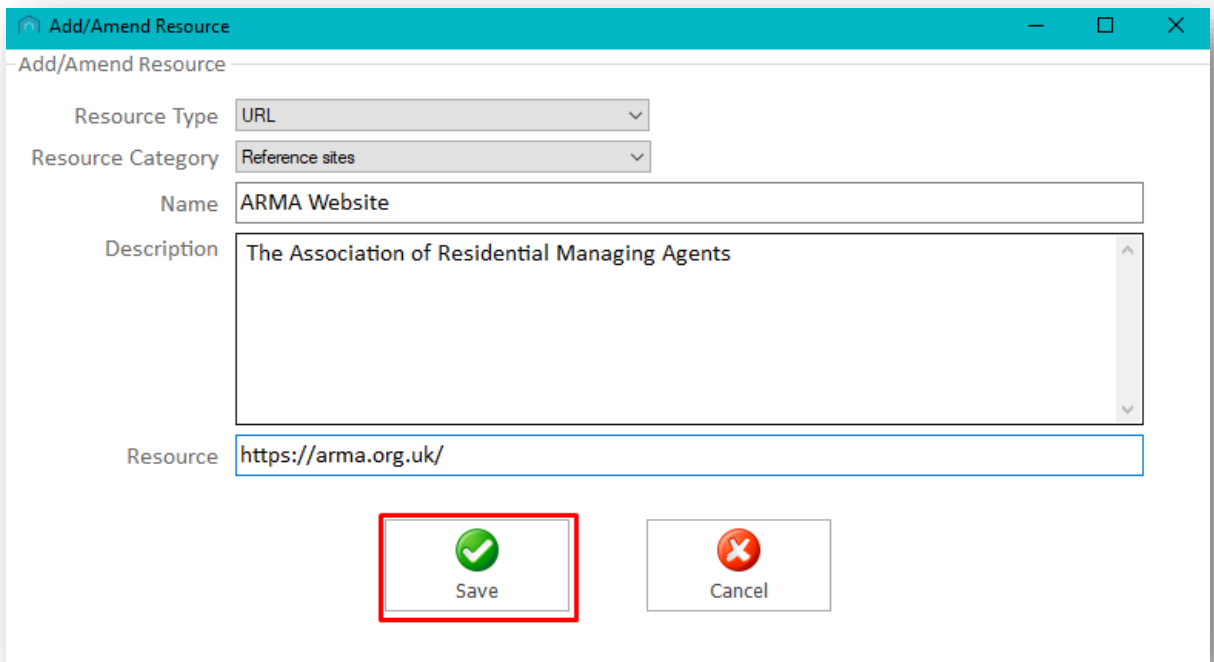
If you are clicking to view a file then CPL will open the resource in a file viewer window.

EDITING A RESOURCE

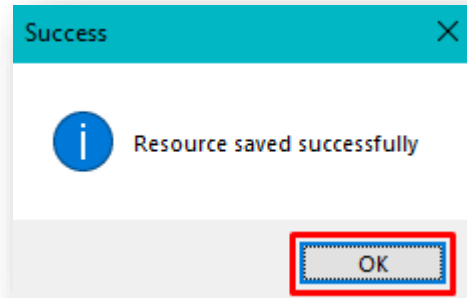
To edit the details for a resource, click to highlight the resource in the list and click on the **Amend** button in the action bar on the left.



This will open the **Add/Amend Resource** window where you can make your changes and save these.



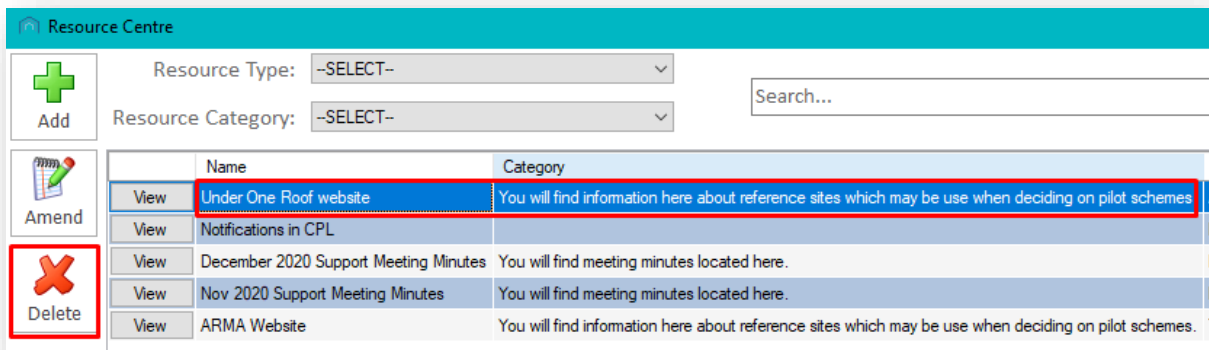
Once the URL has been added you will see a **Success** pop-up notification.



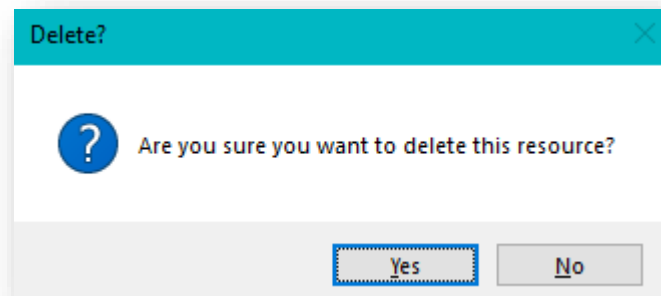
Clicking on **OK** will dismiss this message.

DELETING A RESOURCE

To delete a resource, click to highlight the resource in the list and click on the **Delete** button in the action bar on the left.



The system will present you with a pop-up window asking you to confirm the deletion.





CPL KNOWLEDGE BASE

This training guide forms part of CPL's Knowledge Base which is available for all CPL users at <https://contact.cplsoftware.com/portal/home>

The CPL Knowledge Base will be continually updated with additional guides and information. If you have any questions or suggestions for further guides we'd be happy to hear from you. You can contact CPL Support by emailing us at support@cplsoftware.com or through our portal at <https://contact.cplsoftware.com/portal/home> or calling us on 0345 646 0240 (option 1).

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