CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

WARRANTIES AND MAINTENANCE CONTRACTS

TRAINING GUIDE

JANUARY 2020

Version 1.2

CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS & BLOCK MANAGERS

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CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS & BLOCK MANAGERS

INTRODUCTION

In CPL, the Warranties/ Maintenance module allows you to store warranty documentation and information relating to contractors who deal specifically with maintenance contracts for your individual developments. You can add any additional relevant dates and launch jobs related to these dates.

The system also allows you to set and receive reminders for warranties about to expire or warranties which are overdue.

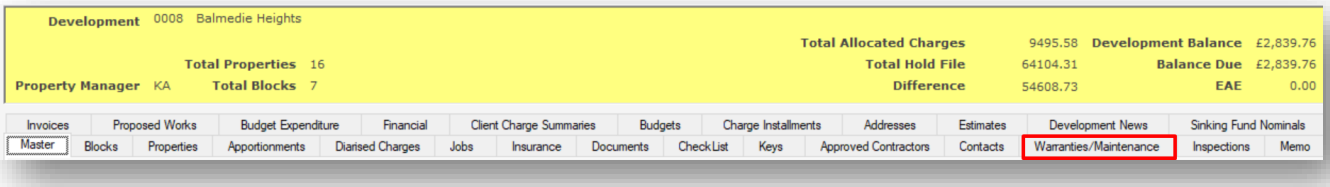
These reminders will appear in CPL's notifications system or in the dashboard cards for warranties if you are using the dashboard.

ADDING A WARRANTY

Open the appropriate development for which you would like to add a warranty.

Beneath the pin bar at the top of the screen you will see a series of tabs.

Select the **Warranties/Maintenance** tab. This will open the **Warranties/Maintenance** screen.

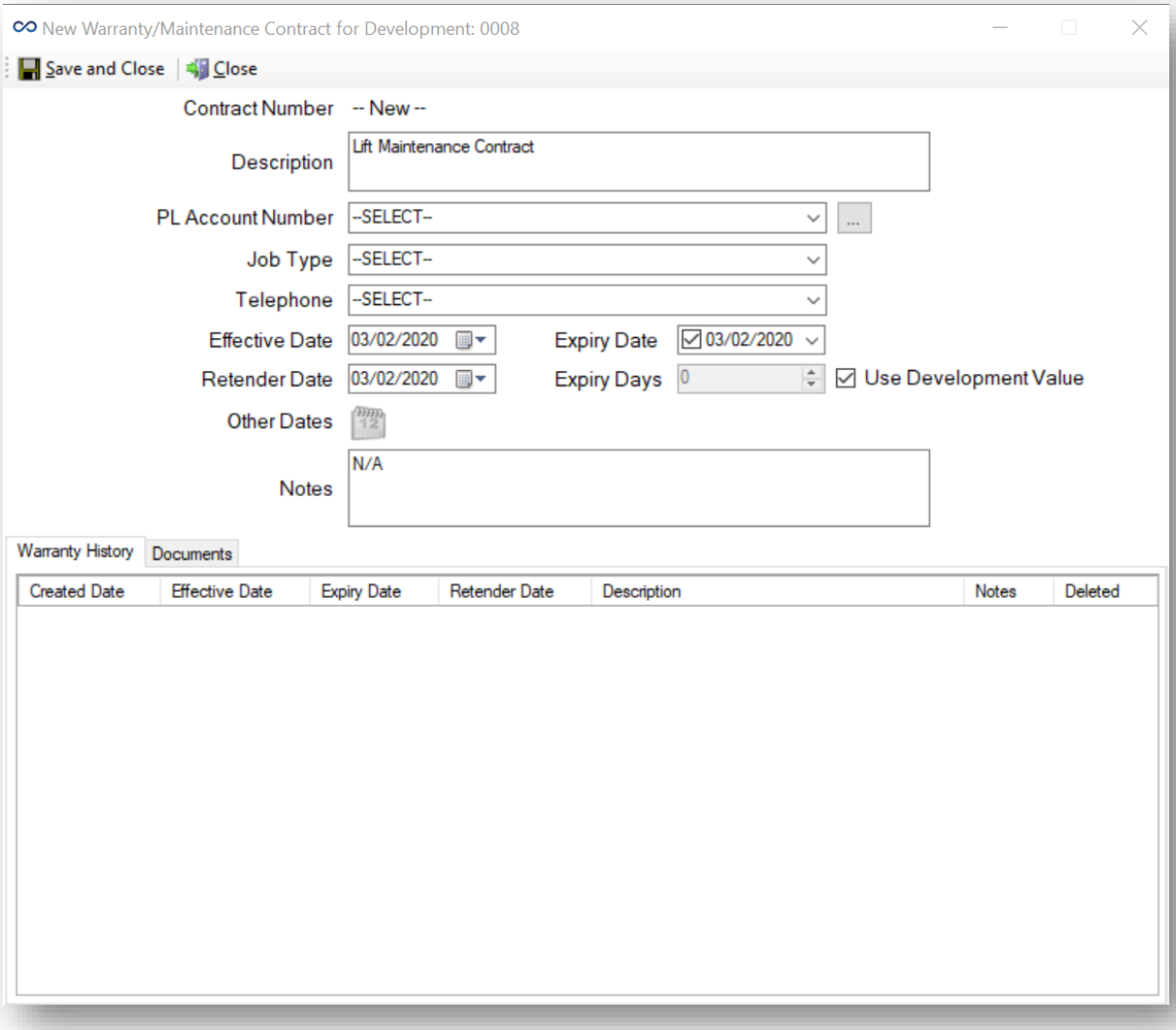


There are two tabs available here:

- **Guarantees/Maintenance/Contracts**
- **Warranty Documents**

In order to do get started adding the details for a warranty or maintenance contract, click on the **Add** button on the Action Panel on the left.

This will open the **New Warranty Maintenance Contract** window for your selected Development.



Enter an appropriate **Description**.

In the **PL Account Number** field select the appropriate contractor who your warranty or maintenance contract is with.

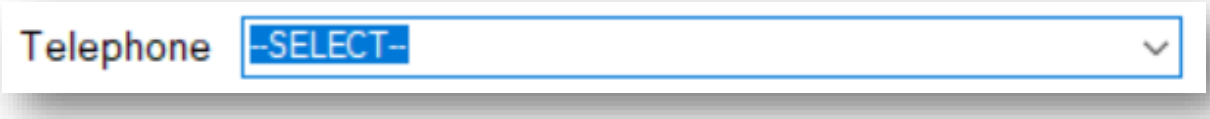
Select from the drop-down menu of contractors or click on the three dots in the box to access the search facility.

If they are not already one of your contractors you will need to set them up in the purchase ledger module ahead of entering this information.

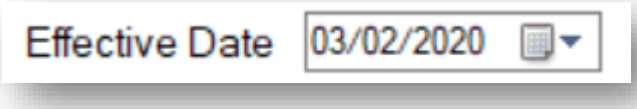
When you select a contractor, it will automatically set the **Job Type**.

If you want to change the **Job Type** you can edit this to reflect an appropriate job type.

Select their **Telephone** number from the drop-down list. There may be a range of telephone numbers registered against this contractor. If this isn't appearing you will need to make sure it has been added in the Purchase Ledger against this account.



Set the **Effective Date** as the date of the start of the maintenance contract or warranty.



Set the **Expiry date** as the date that the current contract/ warranty is due to expire.

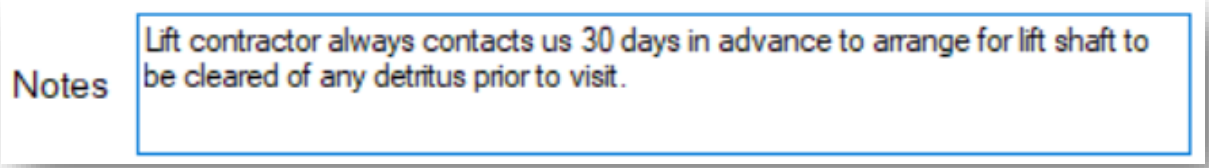
You will notice that the **Expiry Days** will adjust as you add an **Expiry Date**. Instead of setting an expiry date you could choose to set a number of days instead.

Set the **Retender Date** as the date you will want to start arranging for another contract to put in place when the current one expires. Set this for as long as you think you will need to put another contract in place before the expiry date to make sure you're not outside of your warranty or maintenance contract.

*Don't use the **Use Development Values** tick box as this is now obsolete and will be removed.*

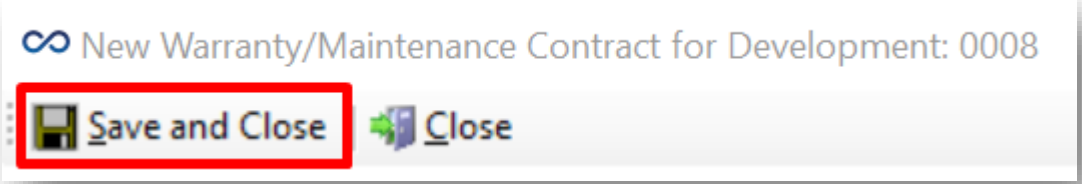
The **Other Dates** field will be explained later in this training guide.

Enter any **Notes** you need to keep as a reminder.

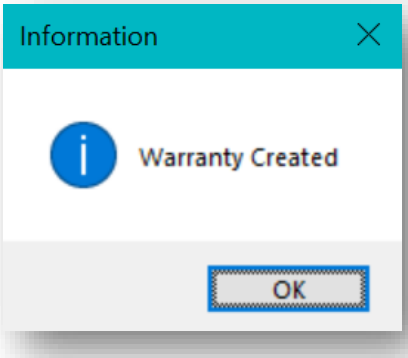


Underneath these fields are two tabs (**Warranty History** and **Documents**) which we'll come onto later in this training guide.

Once you have entered all required details, you can now click **Save and Close** to save your warranty/ maintenance contract.

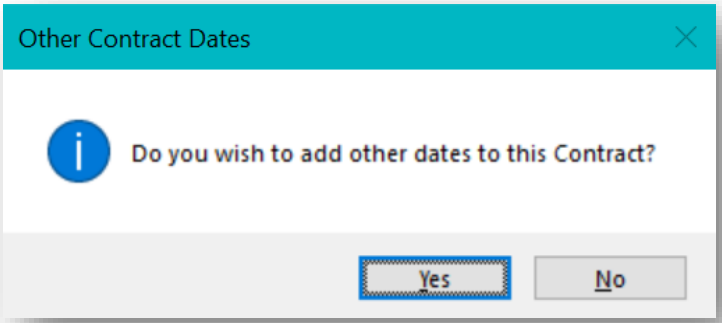


This will cause a pop-up window to appear informing you that the warranty/ maintenance contract has been successfully registered in CPL.

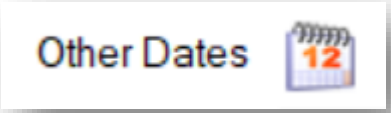


ADDING OTHER CONTRACT DATES

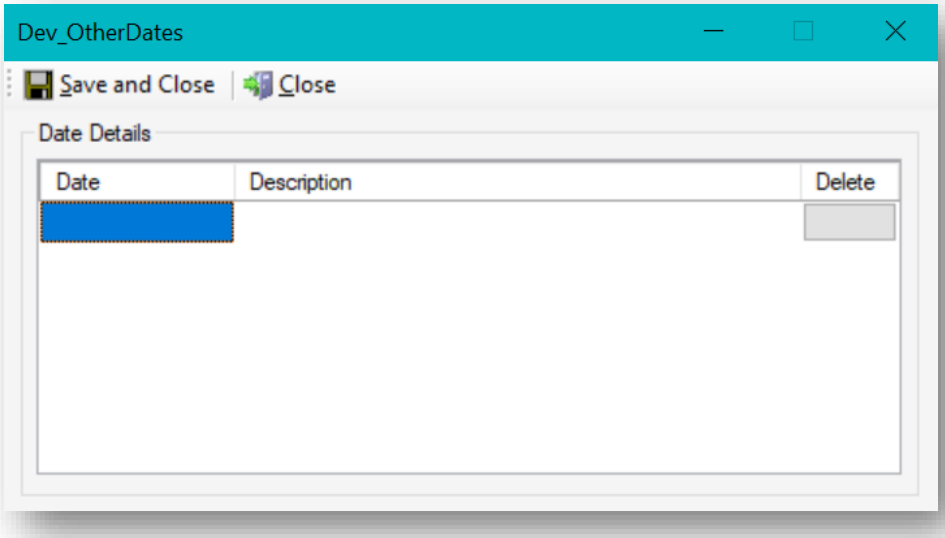
When you click on **Ok** in the pop-up window, you will be offered the chance, in another pop-up to add **Other Contract Dates**.



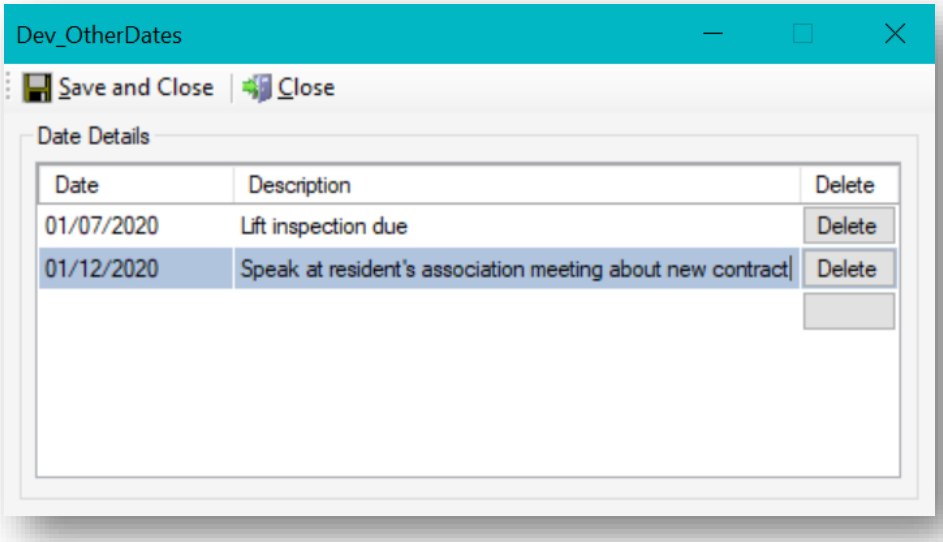
You will also notice that the **Other Dates** icon is no longer greyed out in the window beneath.



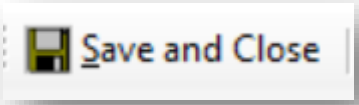
Clicking **yes** on the **Other Contract Dates** pop-up window will give you a basic grid to enter any other relevant dates.



For example, you may want to enter a date with a **Description** regarding any related inspections such as additional electrical inspections. You can add multiple dates into this grid.

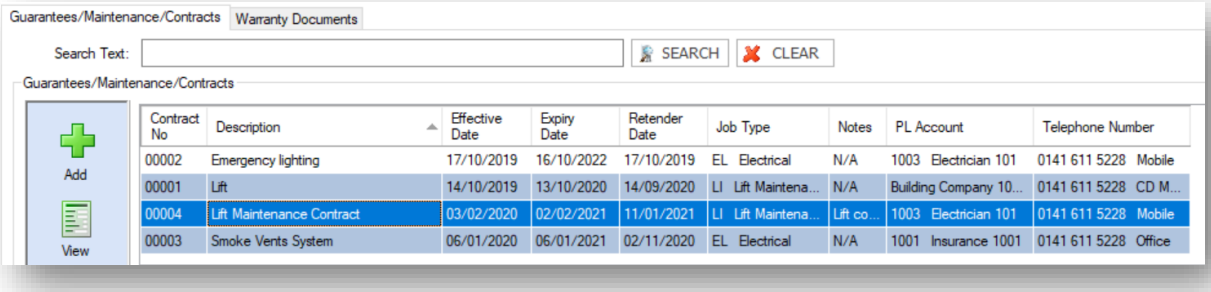


Click **Save and Close** when you have finished entering dates and the screen will close, taking you back to the **Guarantees/Maintenance/Contracts** tab where your warranty/ maintenance contract has been added.

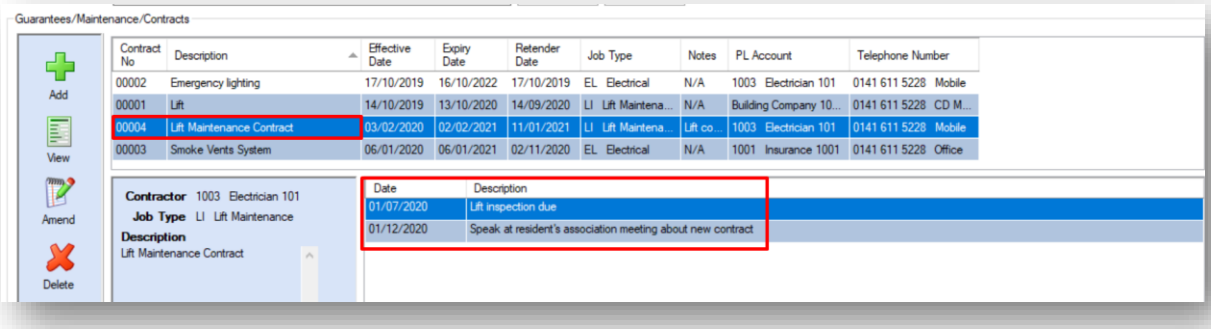


*Please note you can return to the **New Warranty Maintenance Contract** window for this contract at any point and click on the **Other Dates** icon to add other appropriate dates for your contract.*

We've now registered the fact that we have a warranty/ maintenance contract in operation for this Development.

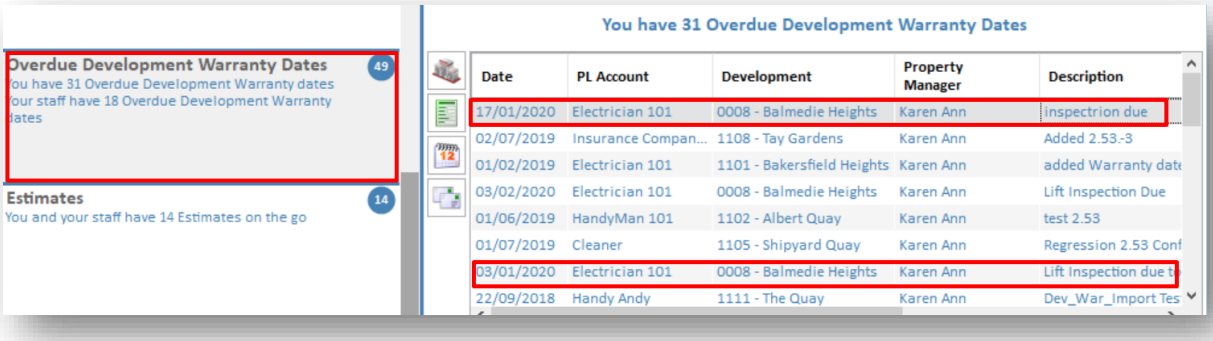


When the individual contract is highlighted, you will also notice that the lower grid contains the **Other Dates** information if you have entered any.



ALERTS FOR OTHER DATES ON THE CPL DASHBOARD

You will be able to view notifications for the other dates you have entered on the **Overdue Development Warranty Dates** card on the CPL Dashboard. This is used to enable you to track whether your contractors have fulfilled their obligations and completed any inspections etc which may be due.



For each of these dates and related PL account, there are various icons at the left-hand panel which are explained below. To be able to use these, make sure you have the correct date highlighted in the grid.

You can click this icon to view the related development.

You can click this icon to view the development warranty itself.

You can click this icon to view the list of other dates for that development warranty.

Lastly, you can click this icon to send an email to the appropriate PL account.

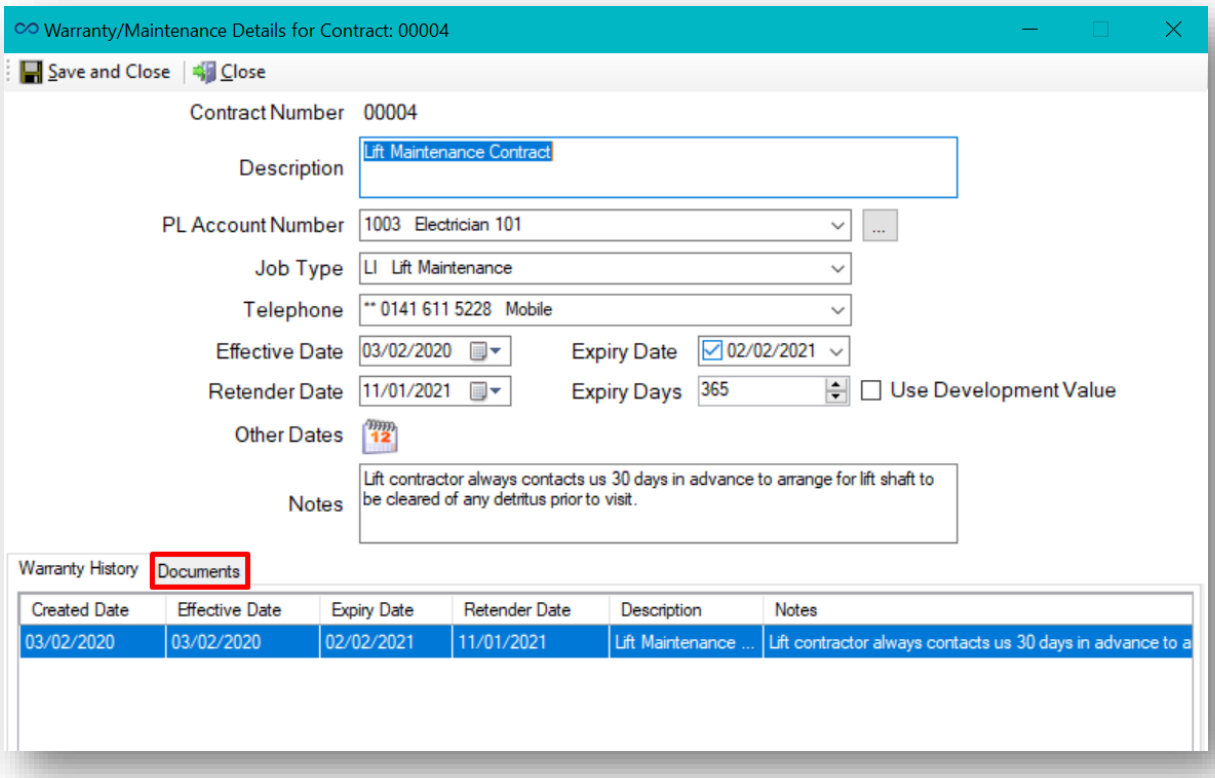
ADDING DOCUMENTS RELATED TO THE WARRANTY/MAINTENANCE CONTRACT

You may want to upload documents to have for your records relating to this contract, such as the actual warranty, a copy of the service contract or any guarantees.

To do this, select your contract in the **Guarantees/Maintenance/Contracts** tab and click **Amend** or double-click to open it or click **View** on the action panel at the left-hand side.

This will open the **Warranty/Maintenance Details** screen for your selected contract.

There are 2 places here that we can store documents. One is the **Documents** tab towards to bottom of the screen next to the **Warranties History** tab. This is the main area for storing your contract documents.

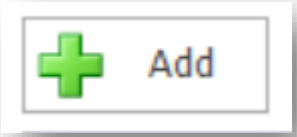


The other area which permits document storage can be accessed through the **Other Dates** icon further up the screen. This allows you to record other dates and then attach other documents relating to your contract if you are using the In-Tray.

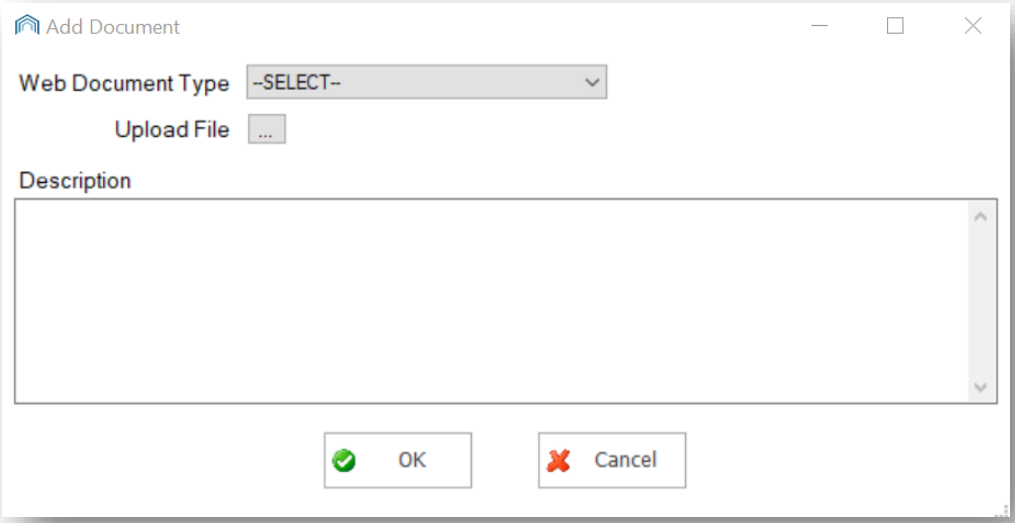
*Please note, you will not be able to upload documents related to this **Other Contract Dates** area unless you are using the In-Tray module. For example, you can record the dates inspections were carried out and add accompanying documents using In-Tray. Otherwise, you will only be able to use the main documents area to store these documents.*

In order to add a document to **Warranty Maintenance Details Documents** area, click on this tab.

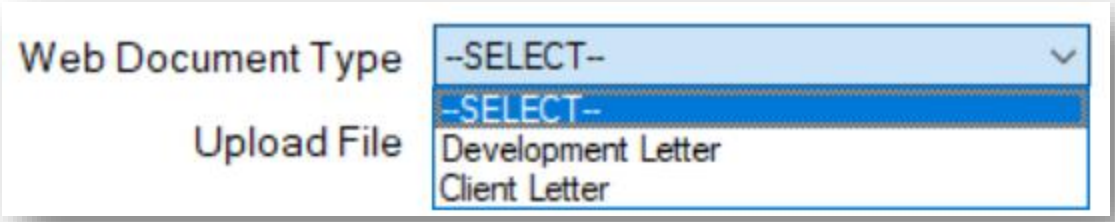
Click the **Add** button which will open the **Add Document** screen.



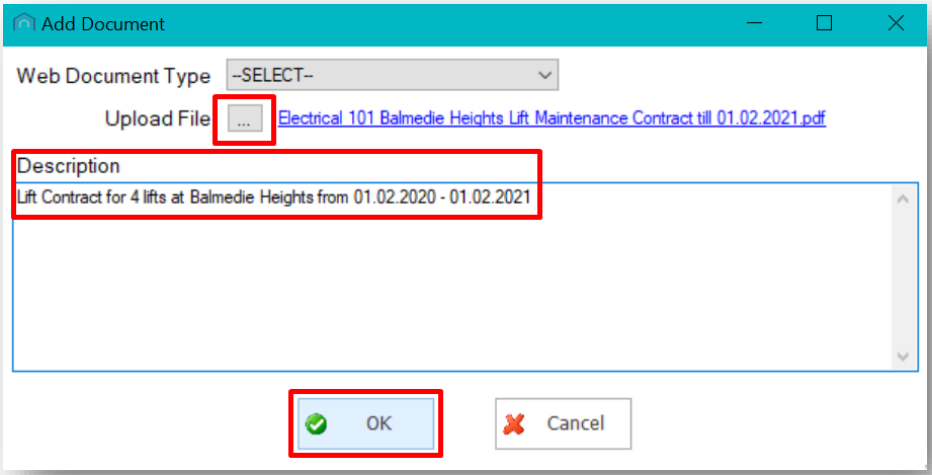
You may be familiar with this screen from other areas in CPL.



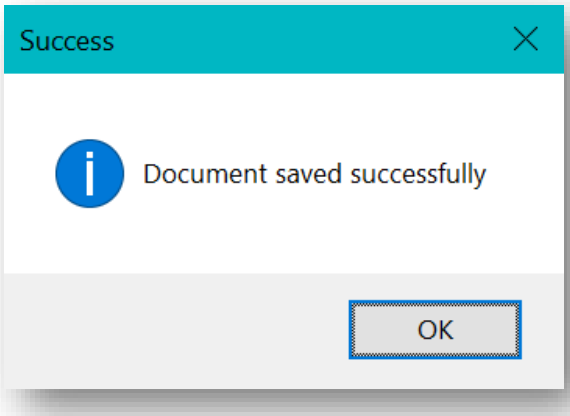
Set your **Web Document Type** if you want this to be available on your Client Portal. If not, then leave this at **Select**.



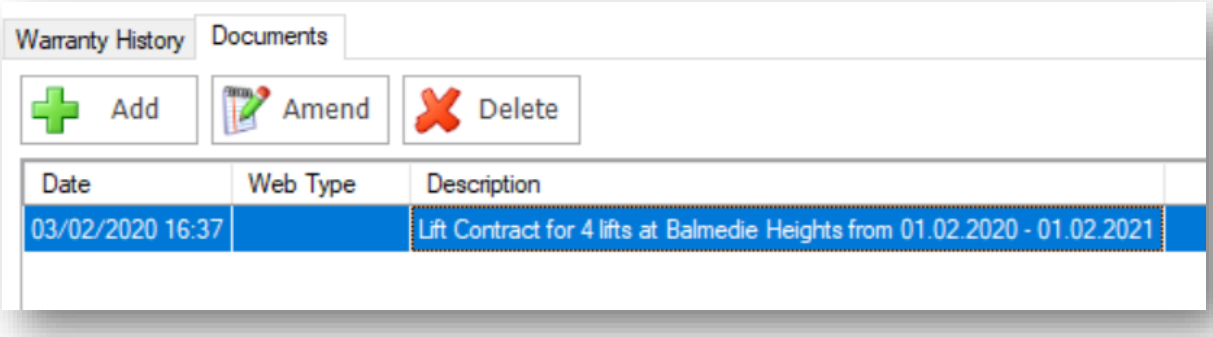
Click the **Upload File** button to browse for your document and add this to the screen. Enter a description for the document and click the **Ok** button.



Once the upload is completed it will bring up a **Success** pop-up window to let you know that your document has uploaded successfully.



Click on **Ok** and you will see your document has been uploaded into the main grid.

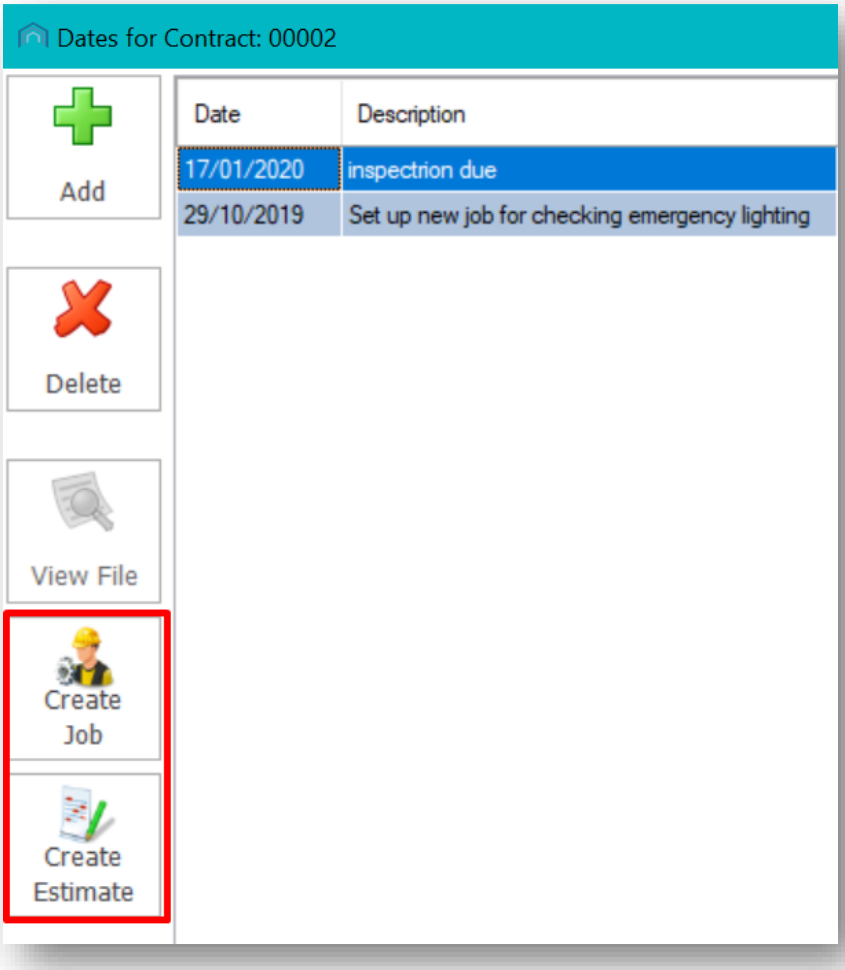


CREATING JOBS OR ESTIMATES RELATED TO YOUR WARRANTY/MAINTENANCE CONTRACT

Once there is a date entered into this section, you can use the additional options available for further action.

For example, a lift is due to be inspected every 6 months. You've set the next inspection date in your **Other Dates** field. You get an alert one morning saying it's due and you go to view it and you will be able to use the **Create Job** button to get your contractor to inspect without leaving the Warranties area to go to Jobs Maintenance.

You may wish to add a job or an estimate related to a date you have added.



This Job will be pre-populated with the details you entered when you set up the warranty/ maintenance contract in the first place.

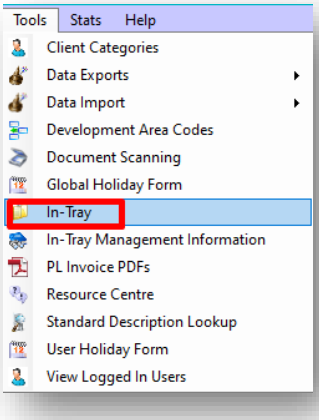
ADDING DOCUMENTS THROUGH THE IN-TRAY MODULE

The In-Tray module is where the system can accept reports from contractors for the dates that specific tasks happen in the warranty. These are normally inspections and this is where those inspection documents can be allocated to the inspection date in the system and any work required can be triggered from there.

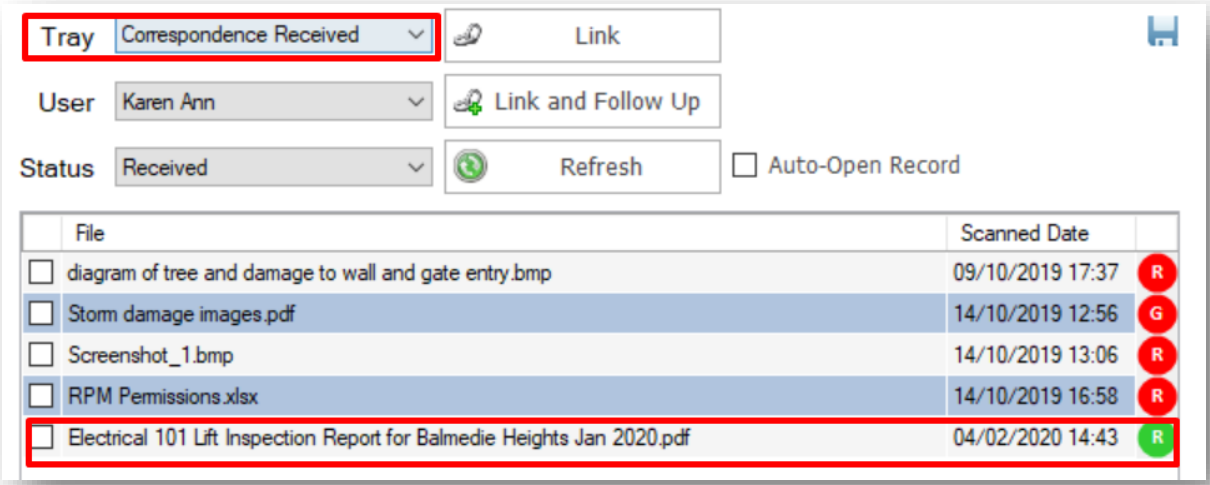
Documents which are relevant to the whole warranty or maintenance contract can be added to the main documents tab as was explained above.

However, as was previously mentioned you may want to add documents specific to a date you have added. Currently, the only method for doing this is through the In-Tray.

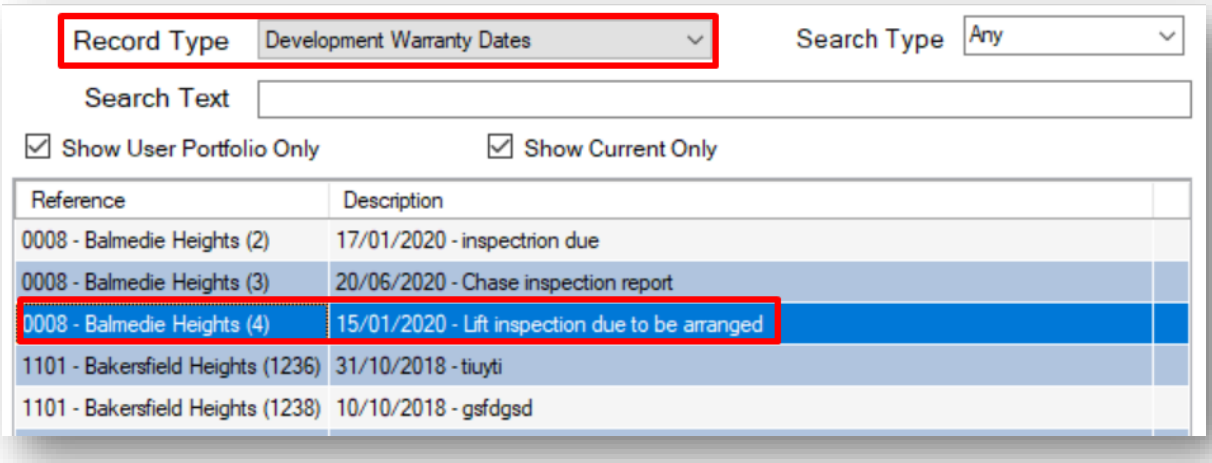
To open In-Tray in CPL, click on **Tools** in the menu bar and scroll down through the options until you reach the **In-Tray** options. Click on **In-Tray**:



On the right of the screen, select the **Correspondence** option in the **Tray** field and then find your file.

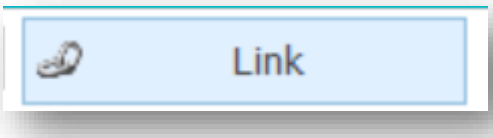


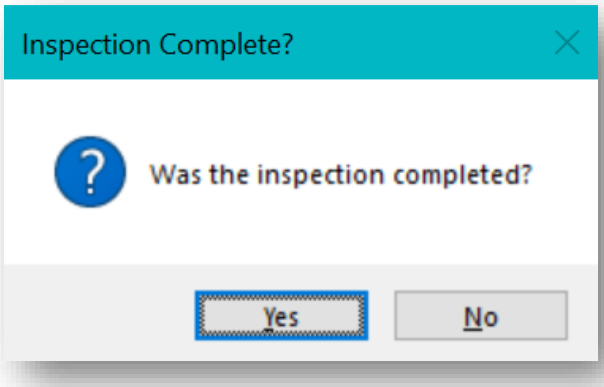
Once you have done this, select **Development Warranty Dates** from the **Record Type** field and then select the appropriate Development from the list in the grid.



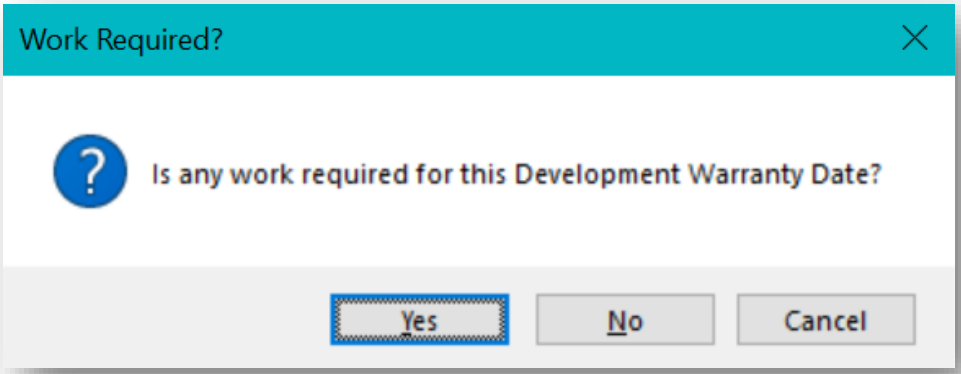
In the **Description** column you will see the date and the description for an individual warranty. There may be more than one warranty set up for each Development.

Click on the **Link** button and you will receive a pop-up window asking you **Has the inspection been completed?** And asking you to click on **Yes** or **No**.



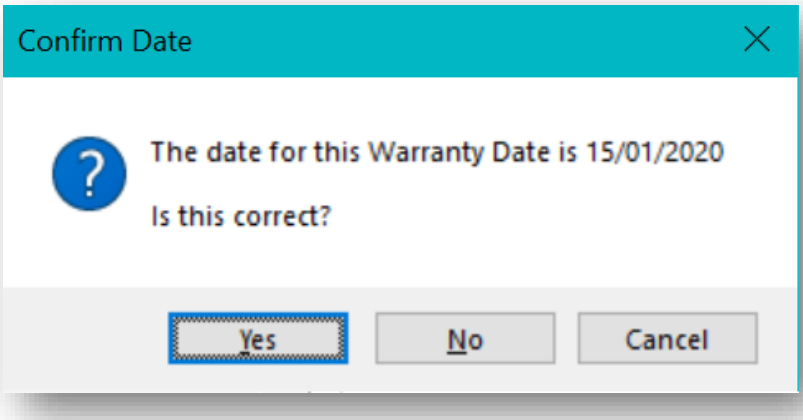


When you click on **Yes** you will see another pop-up window asking you **Is any work required for this Development Warranty date?**

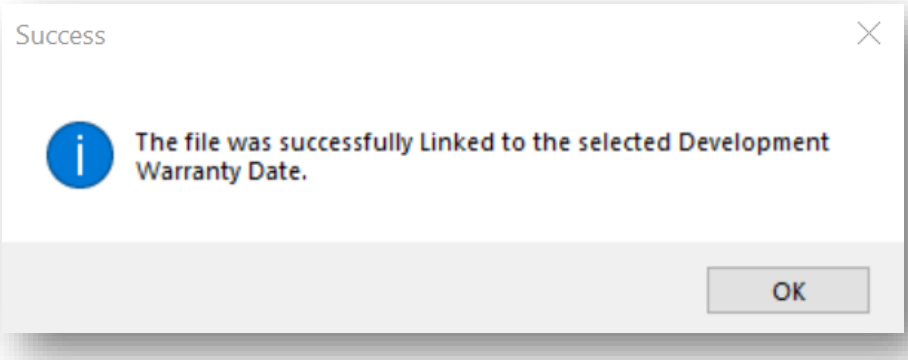


If you say **Yes**, the system allows you to select the next user who will be dealing with the file. For example, it could be the Jobs team, or another Property Manager. It would then change the status of that file to **Pending**. It will remain as pending until it has been marked as **Processed** (completed).

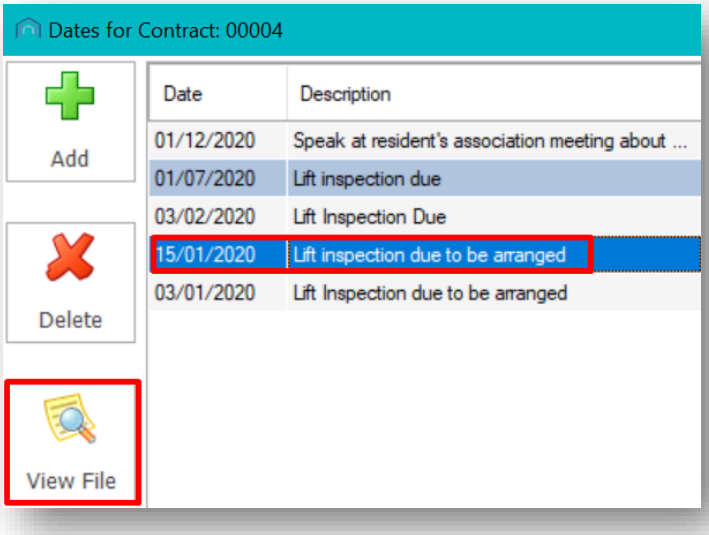
If you click on **No**, it will ask you to **Confirm Date** and you will be able to confirm if the warranty date is correct and then click **Yes**.



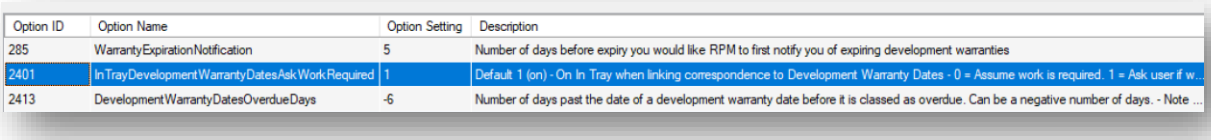
You will then get a confirmation that the file was linked successfully. If you click **Yes** on the **Work Required** pop-up it completes the upload of the file and gives you the same confirmation.



This file will now be available to view in the **Warranty/Maintenance Details for Contract** in the **Other Dates** window attached to the date you previously entered.



SYSTEM SETTINGS IN RELATION TO WARRANTY REMINDERS – POP-UP ALERTS OR NOTIFICATIONS



Option ID	Option Name	Option Setting	Description
285	WarrantyExpirationNotification	5	Number of days before expiry you would like RPM to first notify you of expiring development warranties
2401	InTrayDevelopmentWarrantyDatesAskWorkRequired	1	Default 1 (on) - On In Tray when linking correspondence to Development Warranty Dates - 0 = Assume work is required. 1 = Ask user if w...
2413	DevelopmentWarrantyDatesOverdueDays	-6	Number of days past the date of a development warranty date before it is classed as overdue. Can be a negative number of days. - Note ...

There are system settings which can be used to set the defaults for your business for warranty reminders.

A **Development Warranty Alert** system setting allows users to be alerted about existing warranties when creating a new job on a development outside of Warranties.

The **Warranty Expiration Notification** system setting sets the number of days before expiry you would like CPL to first notify users of expiring development warranties.

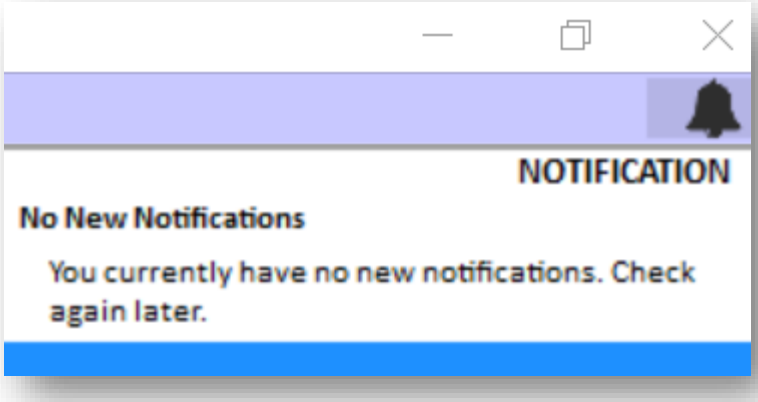
The **Development Warranty Dates Overdue Days** is a system setting which sets the number of days past the date entered as an item in the **Other Dates** section. This can be set in negative days so that you can be warned ahead of time.

DASHBOARD CARDS AND NOTIFICATIONS FOR WARRANTIES

Once the above system settings have been made in CPL, the following appear as notifications/ reminders and cards on the Dashboard (if you have this) but are controlled by whether notifications are turned on in your system (and for you) and whether the cards have been activated on your Dashboard.

Notifications can be turned on for your whole company but then individuals can control whether they see them or not in their **User Login** screen.

Notifications pop up at the right-hand side of your CPL screen.

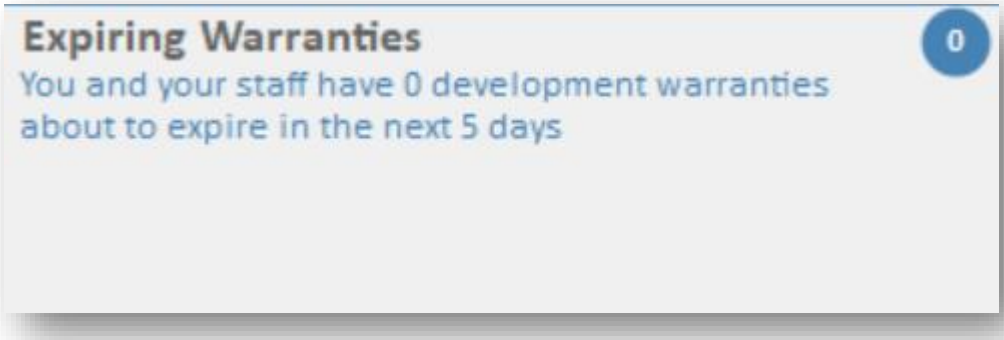


DASHBOARD CARDS

There are three cards available in the Dashboard to monitor your warranties/ maintenance contracts and to help you to stay organised.

EXPIRING WARRANTIES

This is summary dashboard card for expiring warranties.



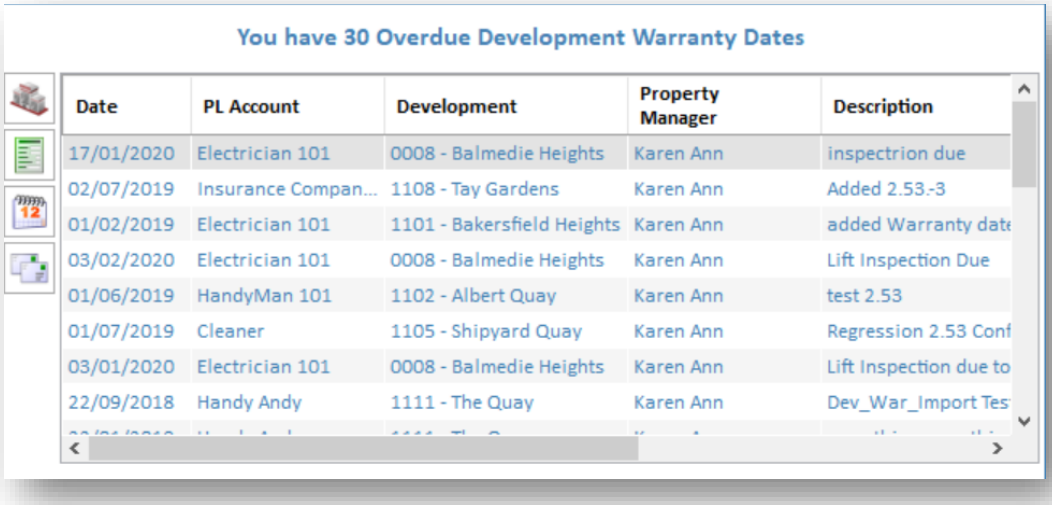
You will be alerted to warranties expiring based on the dates you entered when you created them on the system.

OVERDUE DEVELOPMENT WARRANTY DATES

This is the summary dashboard card for overdue development warranty dates.

As previously explained, this card relates to any development warranty **Other Dates** you added. It allows you to be notified when these are approaching and to allow you to prepare for any relevant actions required.

This is the detail summary for this card:



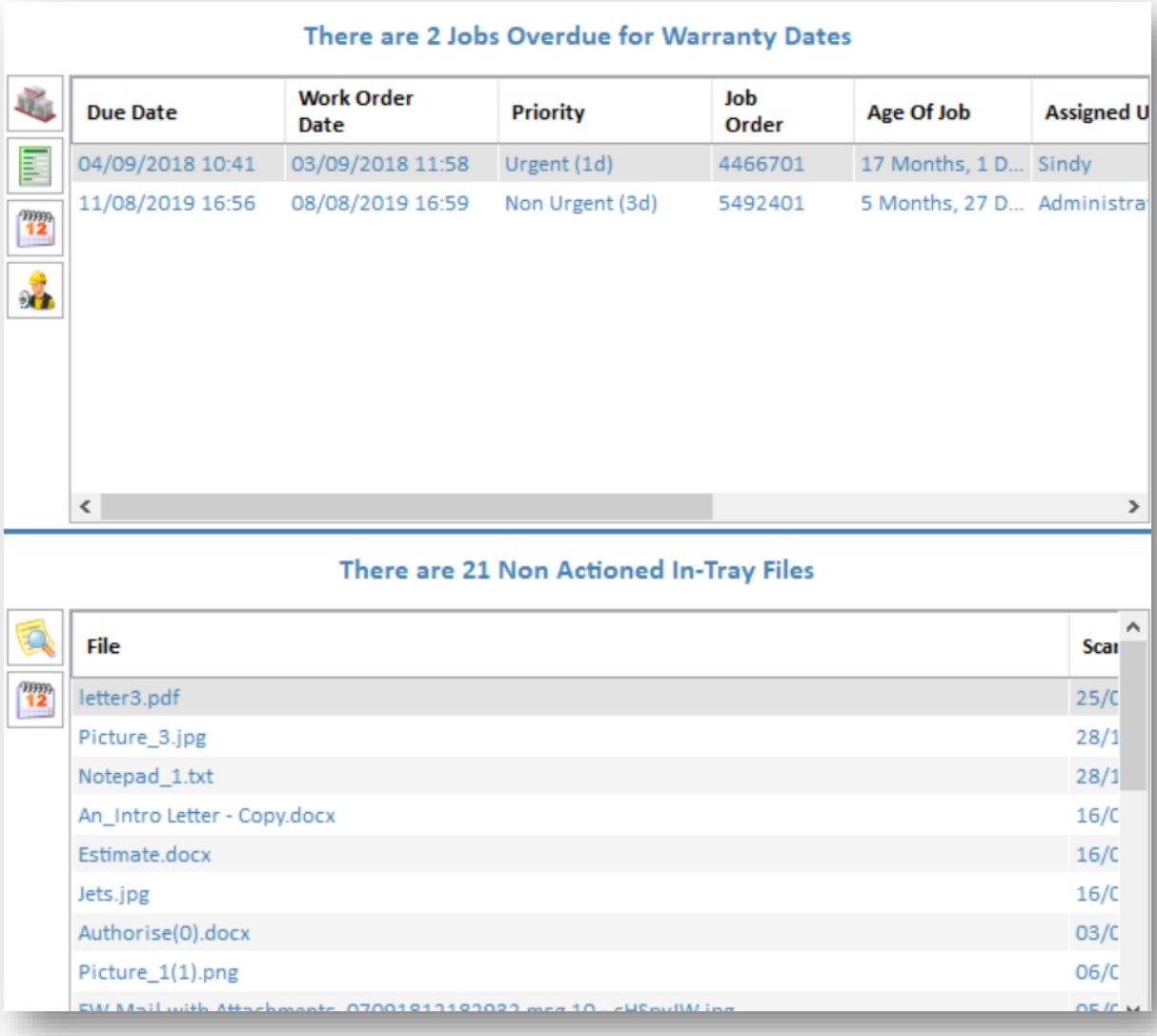
You have 30 Overdue Development Warranty Dates

Date	PL Account	Development	Property Manager	Description
17/01/2020	Electrician 101	0008 - Balmedie Heights	Karen Ann	inspectrion due
02/07/2019	Insurance Compan...	1108 - Tay Gardens	Karen Ann	Added 2.53.-3
01/02/2019	Electrician 101	1101 - Bakersfield Heights	Karen Ann	added Warranty date
03/02/2020	Electrician 101	0008 - Balmedie Heights	Karen Ann	Lift Inspection Due
01/06/2019	HandyMan 101	1102 - Albert Quay	Karen Ann	test 2.53
01/07/2019	Cleaner	1105 - Shipyard Quay	Karen Ann	Regression 2.53 Conf
03/01/2020	Electrician 101	0008 - Balmedie Heights	Karen Ann	Lift Inspection due to
22/09/2018	Handy Andy	1111 - The Quay	Karen Ann	Dev_War_Import Tes

DEVELOPMENT WARRANTY DATES

This is the main dashboard card for development warranty dates:

This is the detail listed when this card is selected in the Dashboard.



JOBS OVERDUE FOR WARRANTY DATES

This is relevant if you used In-Tray to link document to the **Other Dates** section in Warranties and then selected the **Create Job** button from within that date as a piece of work required related to this warranty.

This could be maintenance/ repair based on an inspection which has taken place – you have the linked inspection report through from In-Tray.

The job is listed overdue because it is yet to be completed or actioned.

NON-ACTIONED IN-TRAY FILES

This is related to when you linked a file from the **In-Tray** module to a warranty and answered **Yes** to the question, **Is any work required for this Development Warranty date?** The system allows you to select the next user who will be dealing with the file. You may, for example be passing something onto the Jobs team, or another Property Manager. It will change the status of that file to **Pending**.

It will remain as pending until it has been marked as processed (completed).

If this file remains as pending then it will show as non-actioned on the Dashboard card.

CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS & BLOCK MANAGERS

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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