



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:

uwv_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



CLIENT DETAILS:

uwv_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
DDRRunTimesLeft	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 3 rd Rate if entered against policy
Rate4	Insurance Policy 4 th 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:

uwv_MMClientInsurance	
Field	Description
AlternativeAddress	alternative address for client
AlternativePostCode	alternative postcode for client
bHasEmail	Does user have email available?
blsEstimateRequestSentByEmail	indicates if client receives insurance estimates via email
blsEstimateRequestSentByPrint	indicates if client receives insurance estimates via printed medium
blsInvoiceReceived	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:

uwv_MMClientNotices	
Field	Description
BalanceDue	the balance due
BatchNo	batch number for client notices run
ClientAccountNumber	client account number
ClientColloquialName	client colloquial 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:

uwv_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
gERQID	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	Colloquial 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:

uwv_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:

uwv_MMProposedWorks	
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
sNotelInterest	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