



WHEN TO USE CYCLICAL MAINTENANCE, WARRANTIES/MAINTENANCE AND DIARISED CHARGES - HELPSHEET

You will find a rationale to help you decide which tool within CPL will be best suited to your purpose.

CYCLICAL MAINTENANCE

Used to track and monitor planned maintenance or items in the title deeds that require to be done on a regular basis. These could include:

- external or internal common areas painting works
- re-carpeting
- refurbishment of lifts
- roof cleaning/ assessment

If there is a schedule of planned maintenance then you would expect monies to be being collected on a regular basis and saved for these eventualities. These would be known as Sinking Funds, Fabric Funds and possibly even Contingency Funds. It may not be relevant to put this through the system as a Proposed Work when they come up because the money may already be available as part of the effective management of the Development. You may still need to request Estimates for these.

WARRANTIES / MAINTENANCE

These are the areas you want to avoid getting sued for not having kept up to date. These tasks are all about compliance and checking to make sure they are done. Property Factors sometimes retain contractors to deliver the compliance but it is good practice to make sure they are being completed.

These could include:

- emergency lighting test
- eye bolt tests
- firefighting apparatus
- fire alarm equipment
- dry risers

Each of these will need to be tested at regular intervals. The Warranties/ Maintenance modules in CPL allow you to set how often they require testing and when the next test is due. The system will alert you (if you are using the Dashboard) if any of these are missed. You will see this alert via a card (which may need to be added for Warranties) on the Dashboard. When a report comes in from the Contractor the system will ask if this is satisfactory as you upload it. If you mark the report as unsatisfactory a workflow will start to remind you to deal with the issue. You will also set the next date the report is due and the process starts again.

DIARISED CHARGES

These are used to automatically bill periodic invoices of the same value to avoid users making repeat postings. This system is designed for postings happening at regular intervals such as the following:

- monthly gardening
- monthly cleaning
- quarterly lift inspections

The CPL Knowledge Base will be continually updated with additional guides and information. If you have any questions or suggestions for further guides or helpsheets we'd be happy to hear from you. You can contact CPL Support by emailing us at support@cplsoftwareltd148.zohodesk.com or



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

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