



HELPSHEET CPL CLIENT PORTAL DOCUMENTS TAB

The Documents tab is very useful tool which allows your clients to view letters/ documents which have been shared via the **Web Type** from CPL. This can give your clients much better access to all documents which have been shared with them and without the need to email or post these out.

WEB TYPE OPTIONS

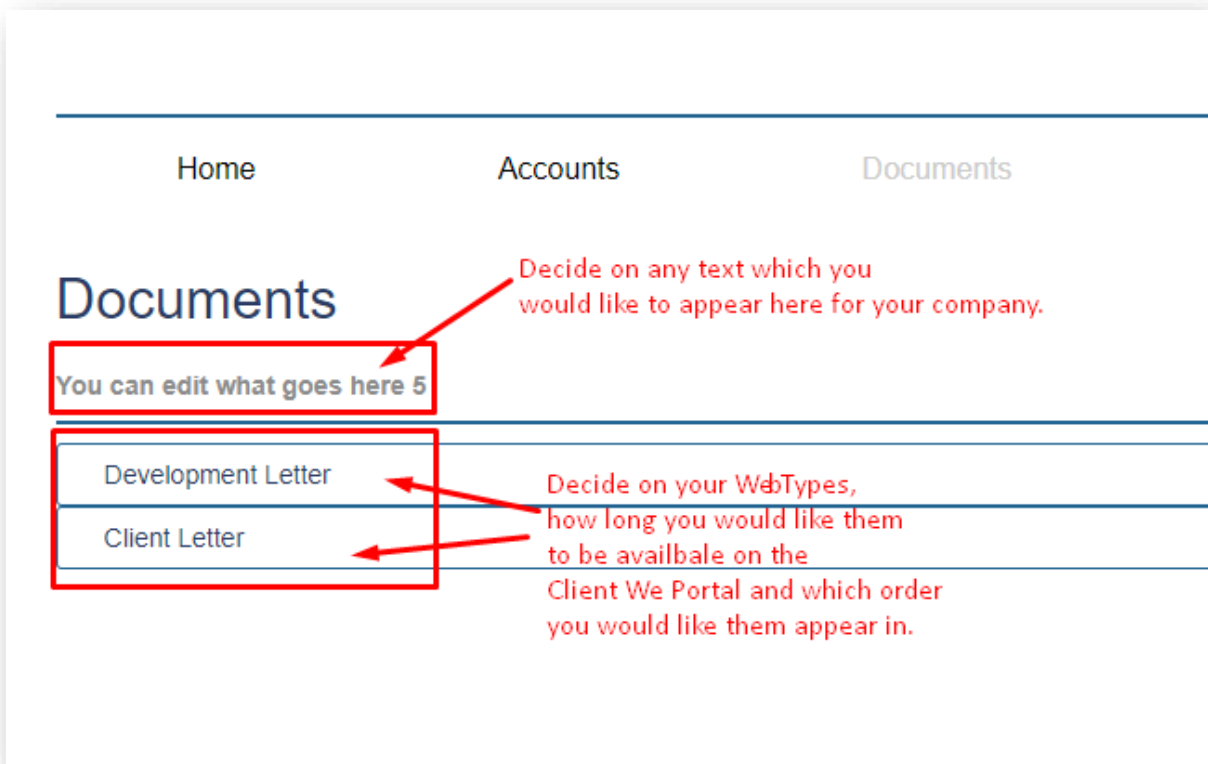
In the example for this Client Web Portal we have chosen for the **Web Types** to be **Development Letter** and **Client Letter** but these could be set to any type you would like. For clients who have access to the portal then you can be saving paper by not sending things out.

If there is not a document relating to a certain type available at any one time then this type or category will not show on the Client Web Portal.

These types will be available to select from any **Document Distribution** tool within CPL.

If you let us know your preferred **Web Types** then we can get these set up for you, including the order you would like them to appear and how long you would like documents of each type to be live on the Client Web Portal. This could be for a specific length of time or to be available on an unlimited basis. These do however, have to be set by type and cannot be set per individual document.

In our example, the two **Web Types** set up on our Client Web Portal are **Development Letters** and **Client Letters**.



You can also provide us with a section of text which you want to appear at the top of your **Documents** tab.



In our example, Development Letters are ones which have been distributed to the whole development.

Development Letter			
Date Uploaded	Description	View Document	View Attachments
05/03/2020	Proposed Work - external door for bin area	Download Document	View Attachments
05/03/2020	Proposed Work - external door for bin area	Download Document	View Attachments
05/03/2020	Proposed Work - external door for bin area	Download Document	View Attachments
05/03/2020	Proposed Work - external door for bin area	Download Document	View Attachments

Client letters have been distributed to the individual client who is logged into the portal.

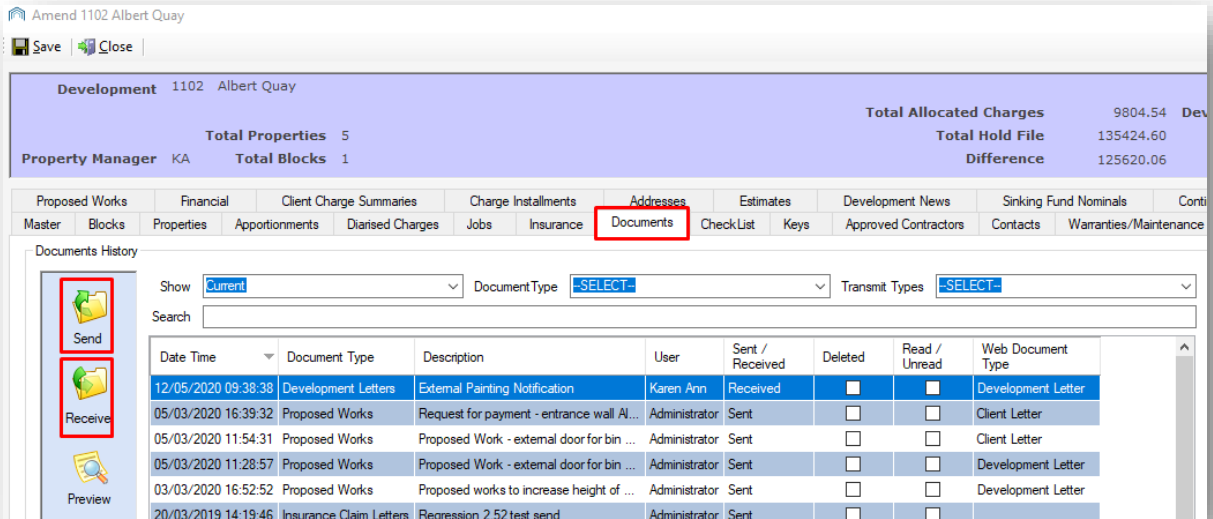
Client Letter			
Date Uploaded	Description	View Document	View Attachments
05/03/2020	Request for payment - entrance wall Albert Quay	Download Document	View Attachments
05/03/2020	Request for payment - entrance wall Albert Quay	Download Document	View Attachments
05/03/2020	Request for payment - entrance wall Albert Quay	Download Document	View Attachments
05/03/2020	Request for payment - entrance wall Albert Quay	Download Document	View Attachments

Clients can click to download any documents and attachments as PDFs.

ADDING A DOCUMENT TO THE WEB PORTAL

You can do this through receiving in a document or sending out a document.

For example, if you go to the **Documents** tab for the appropriate development you will see options to Send or Receive a document out from or into this Development.



Amend 1102 Albert Quay

Save Close

Development 1102 Albert Quay

Total Properties 5 Total Allocated Charges 9804.54 Dev

Property Manager KA Total Blocks 1 Total Hold File 135424.60

Difference 125620.06

Proposed Works Financial Client Charge Summaries Charge Installments Addresses Estimates Development News Sinking Fund Nominals Conti

Master Blocks Properties Apportionments Diarised Charges Jobs Insurance Documents CheckList Keys Approved Contractors Contacts Warranties/Maintenance

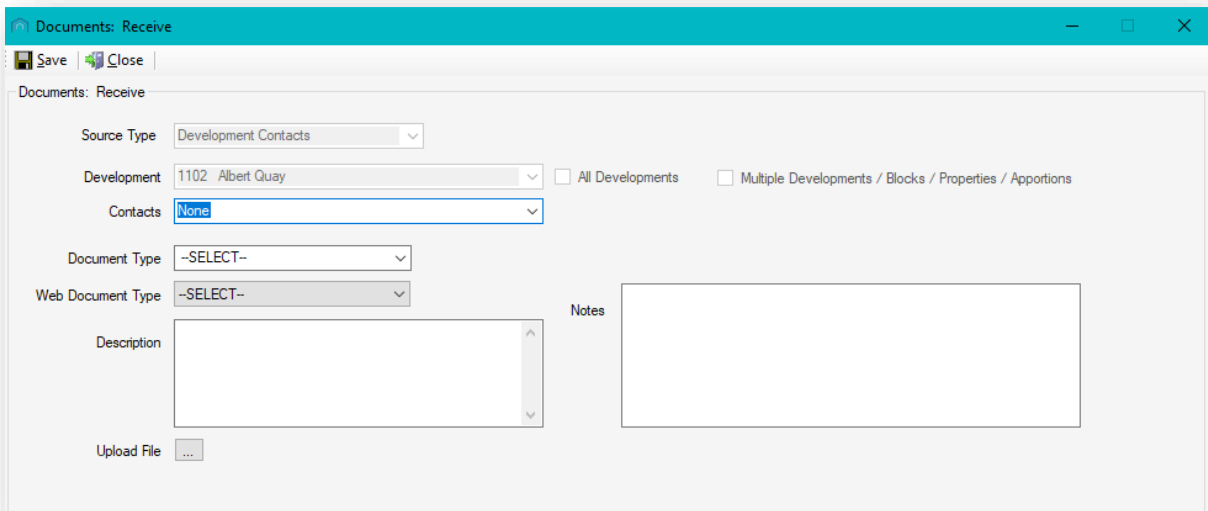
Documents History

Show Current Document Type -SELECT- Transmit Types -SELECT-

Search

Date Time	Document Type	Description	User	Sent / Received	Deleted	Read / Unread	Web Document Type
12/05/2020 09:38:38	Development Letters	External Painting Notification	Karen Ann	Received	<input type="checkbox"/>	<input type="checkbox"/>	Development Letter
05/03/2020 16:39:32	Proposed Works	Request for payment - entrance wall Al...	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	Client Letter
05/03/2020 11:54:31	Proposed Works	Proposed Work - external door for bin ...	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	Client Letter
05/03/2020 11:28:57	Proposed Works	Proposed Work - external door for bin ...	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	Development Letter
03/03/2020 16:52:52	Proposed Works	Proposed works to increase height of ...	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	Development Letter
20/03/2019 14:19:46	Insurance Claim Letters	Regression 2.52 test send	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	

If you choose **Receive** then you will see the following screen.



Documents: Receive

Save Close

Documents: Receive

Source Type Development Contacts

Development 1102 Albert Quay All Developments Multiple Developments / Blocks / Properties / Apportions

Contacts None

Document Type -SELECT-

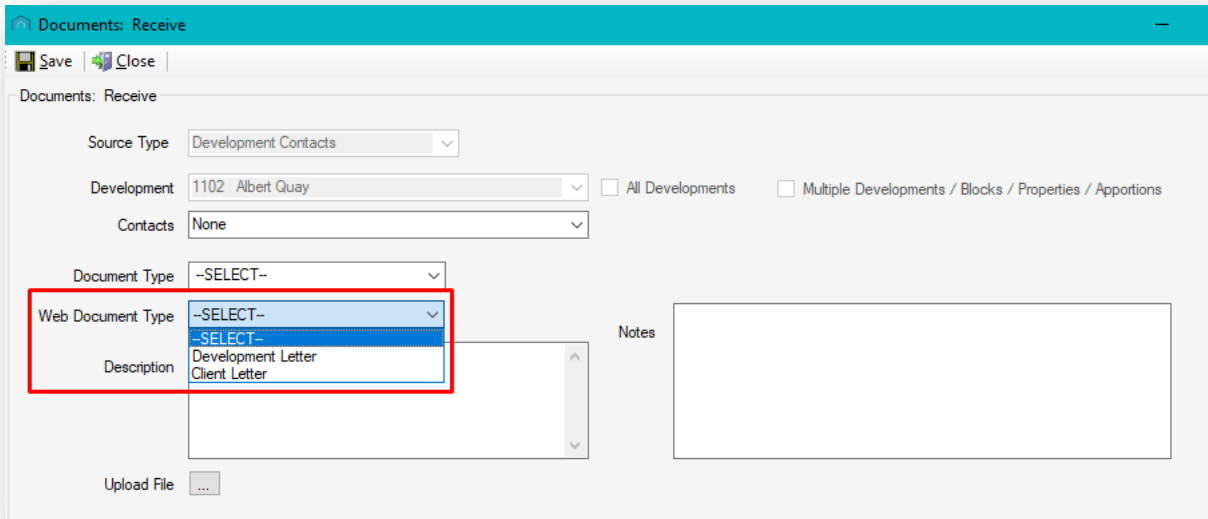
Web Document Type -SELECT-

Description

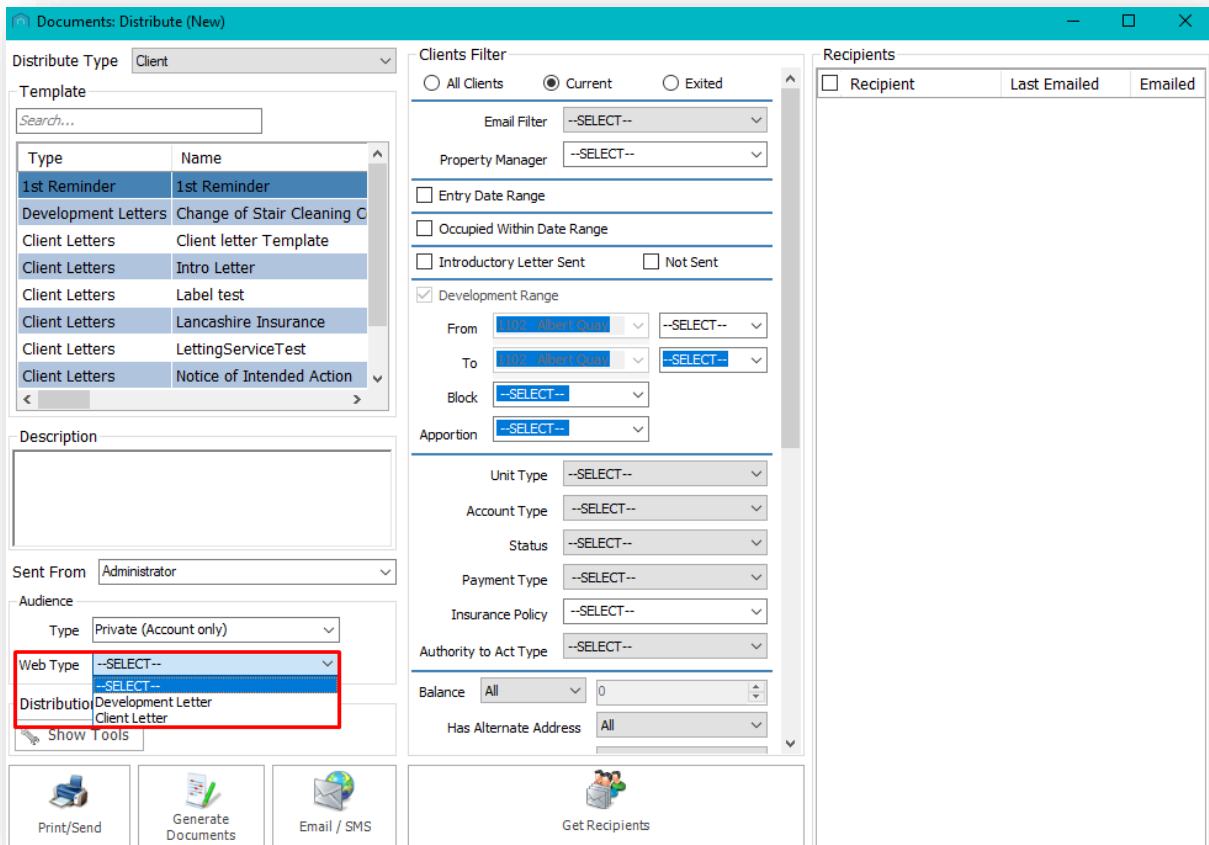
Upload File ...

Notes

There will be options for how to display the document you are uploading into the Client Web Portal by choosing the appropriate **Web Document Type**.



You could also choose **Send** and you would be taken to the **Documents: Distribute** screen in CPL.



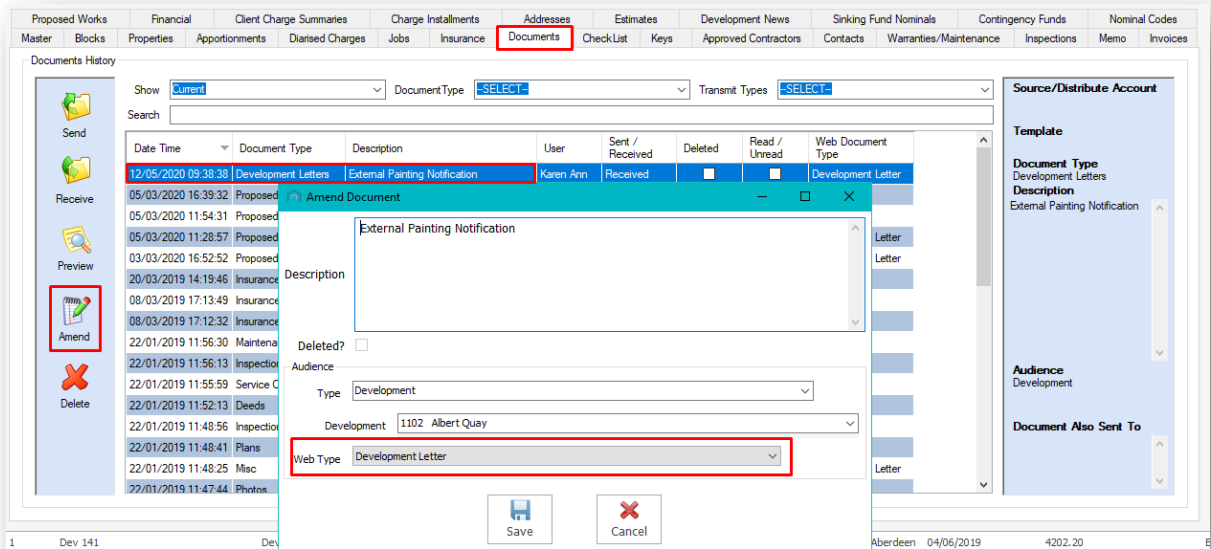
This will allow you to distribute any document in the normal fashion by printing and sending/ emailing but will also allow you to select a **Web Type** to have the document display in a section within the **Documents** tab of the Client Web Portal.

CHANGING HOW A WEB DOCUMENT IS DISPLAYED ON THE WEB PORTAL

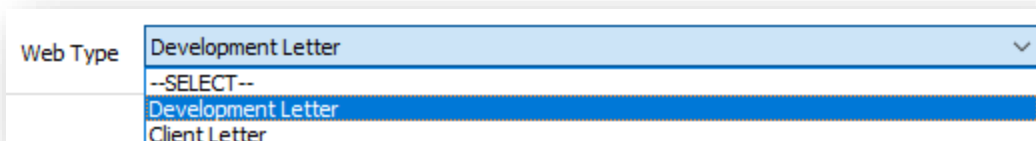
If you have shared a document to the Client Web Portal but have selected the wrong **Web Type** then you change this.

Navigate to wherever you shared the document from or whatever audience you set for it in CPL.

Click on the document in the **Documents** tab and then click on **Amend**.



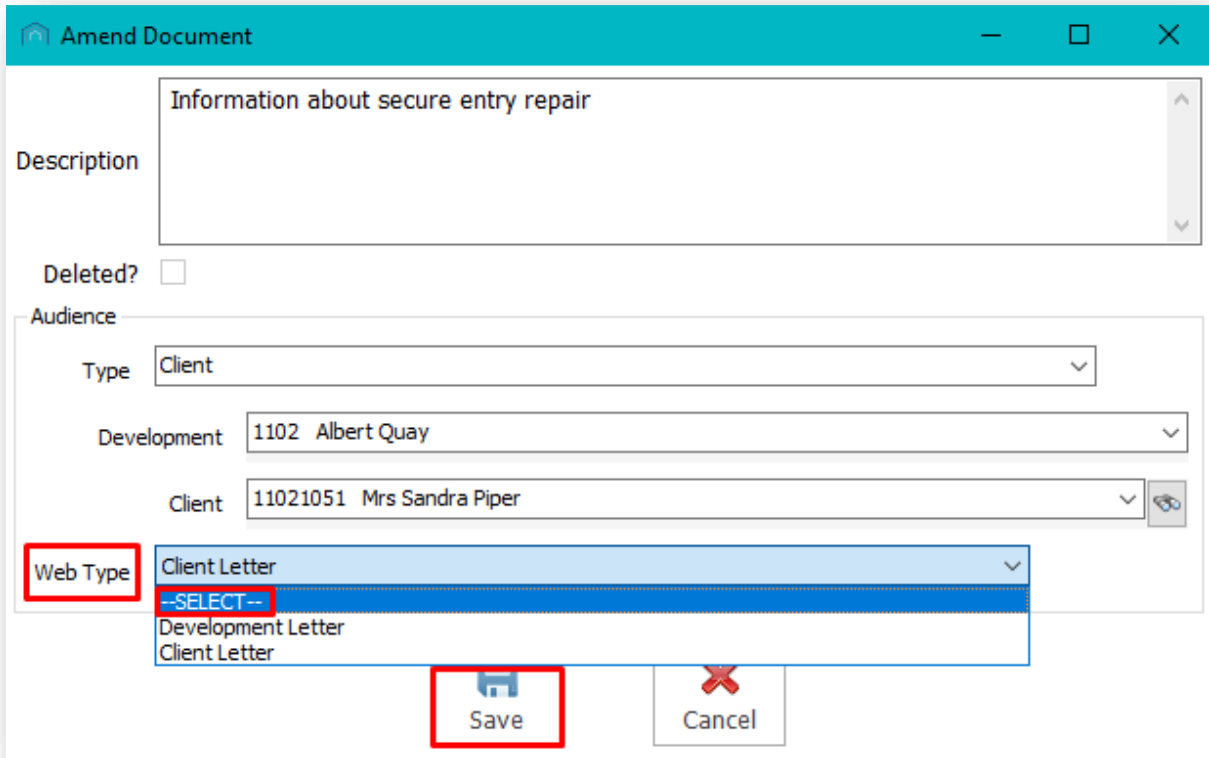
You will be able to use the **Web Type** option to change the section your document is displayed in the documents tab of the client web portal and then click **Save** to make your change.



REMOVING A WEB DOCUMENT FROM THE CLIENT WEB PORTAL

If you would like to remove the document from the client portal altogether but keep it wherever it is located in CPL then follow the same process as above to locate your document and then when you amend it and change the **Web Type** you can set this to **--SELECT--**.

Click **Save** to make your changes.



Amend Document

Description: Information about secure entry repair

Deleted?

Audience

Type: Client

Development: 1102 Albert Quay

Client: 11021051 Mrs Sandra Piper

Web Type: Client Letter, --SELECT--, Development Letter, Client Letter

Save Cancel

It will still be available in the relevant document library in CPL but will no longer be available on the Client Web Portal or App.