



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

WORKING WITH CLIENT PORTAL DOCUMENTS

TRAINING GUIDE

APRIL 2023

Version 1.0

CONTENTS

Introduction	3
Making a Document Available Whilst Receiving it into CPL	3
Option 1A - Uploading a Document to the main Receive In Area.....	3
Option 1B - Uploading a Document to the main Receive In Area to share with Individual Blocks, Properties and Apportionments	7
Selecting a Development	8
Selecting one or more Blocks	9
Selecting one or more Apportionments	10
Selecting one or more Developments	10
Option 1C - Uploading a Document to a Specific Document Area in CPL	12
Option 2 – Making a Previously Uploaded Document Available in your Client Web Portal	15
Making a Document Available Whilst Sending it Out	18
Option 3 – Distributing a Document and Making it Available in your Client Web Portal	18
Removing a Document from your Client Web Portal.....	20
CPL Knowledge Base.....	23

INTRODUCTION

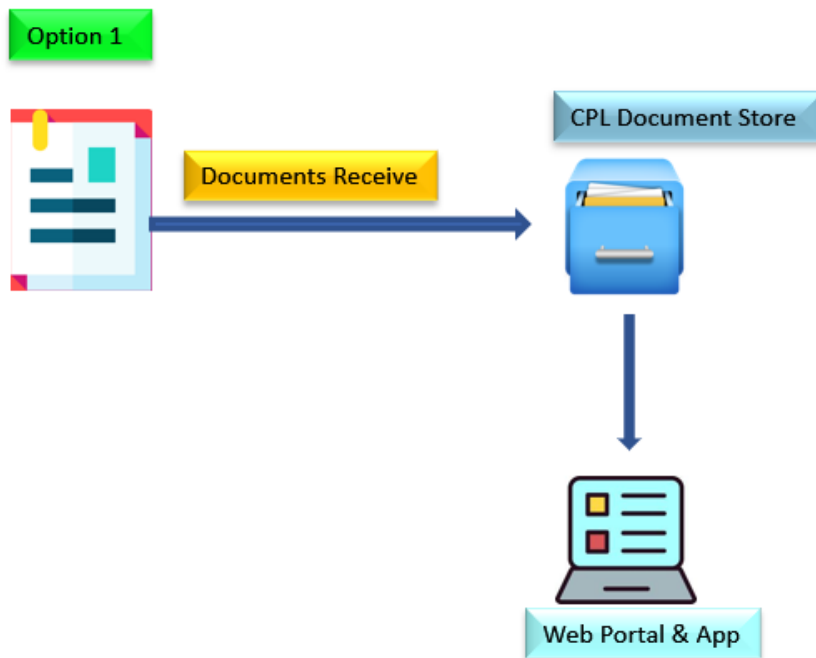
If you have subscribed to the Documents tab available in your Client Web Portal, then it is possible to have documents and letters appearing on this tab for your clients to download. You can ask us at CPL to create multiple **Web Document Types** which act as sub-headings within your Documents tab on the portal. When sharing your documents, you can select the relevant Web Document Type that you wish your individual documents to appear under.

You can enable a document to appear in the Documents tab of your client portal as part of the receiving in process or the sending out process in CPL.

This training guide will cover the steps required to upload a document to a document area in CPL and make it available on your portal. It will cover how to make a document available on your portal as part of the documents distribute process. It will also cover how documents can be removed from the Documents tab on your portal.

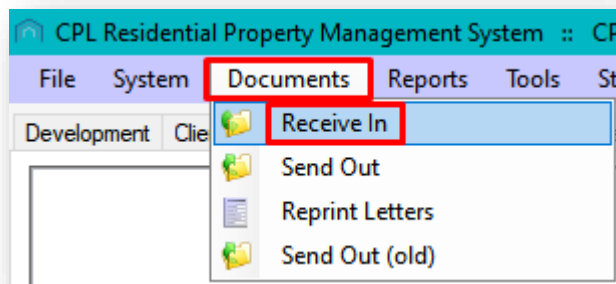
MAKING A DOCUMENT AVAILABLE WHILST RECEIVING IT INTO CPL

If the document you wish to make available on your portal is not a document you are sending to clients through the Documents Distribute screen in CPL, then it may not have already been added to a CPL Document library. This section will cover two options detailing how your document will first need to be uploaded to a Documents area in CPL in order for you to be able to make it available on your client web portal.

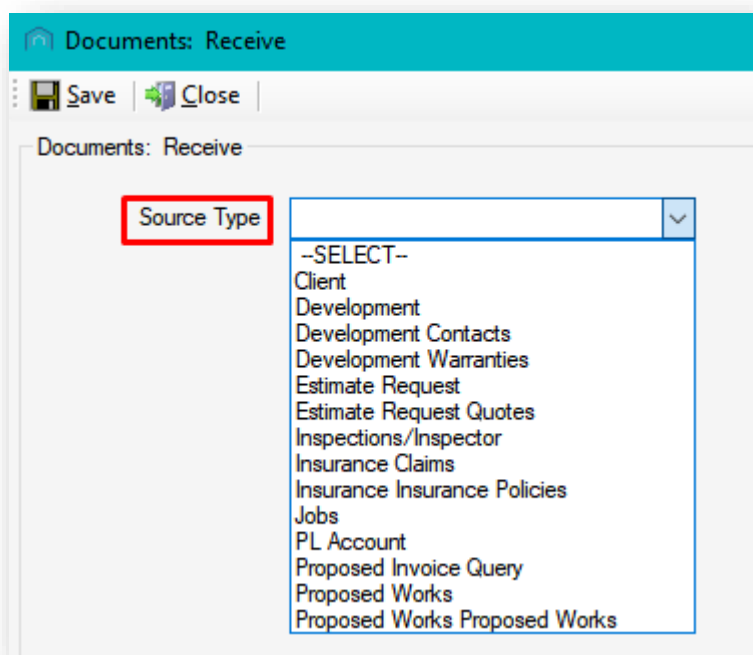


OPTION 1A - UPLOADING A DOCUMENT TO THE MAIN RECEIVE IN AREA

Documents can be uploaded into any Documents tab in CPL but also through the main **Receive In** option under **Documents** in the main header bar of CPL.

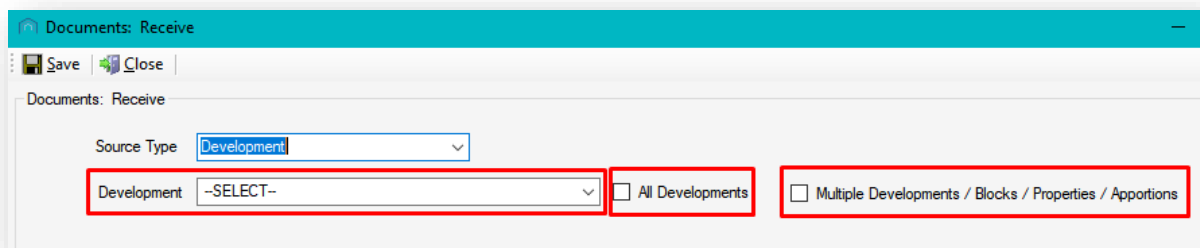


When you click on the **Receive In** option under the main **Documents** menu in CPL, you will be taken to the **Documents: Receive** screen where you will need to select a **Source Type** for your document.



As you are receiving a document into CPL, then setting the Source Type is about saying where the document has come from. It will allow you to tell CPL which area you would like to receive the document into.

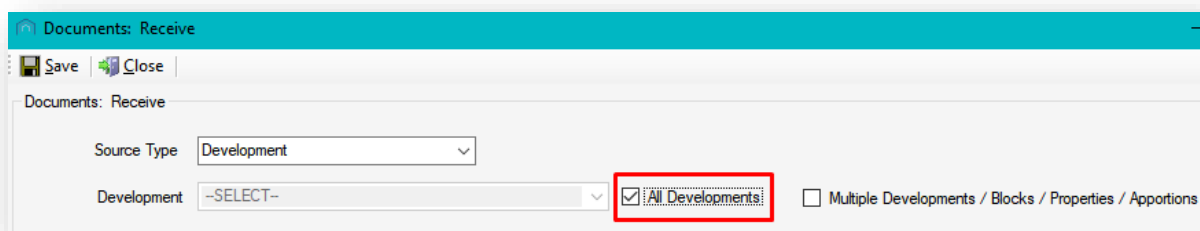
If you select **Development** as your Source Type, then the screen will change to allow you to select an individual development, all developments, or enable you to select from across a range of developments, blocks, properties and apportionments.



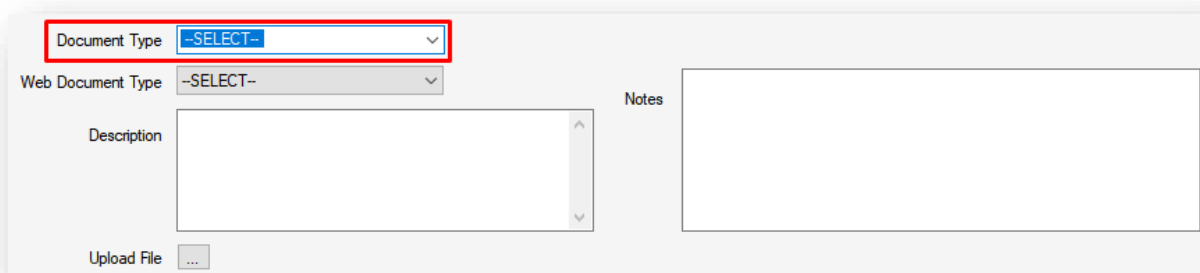
Making an appropriate selection here can also help you to control the clients who will be able to access the document on the Documents tab in your portal.

For example, if you are sharing your client statement of service, you may want to make this available to every client in every development you manage.

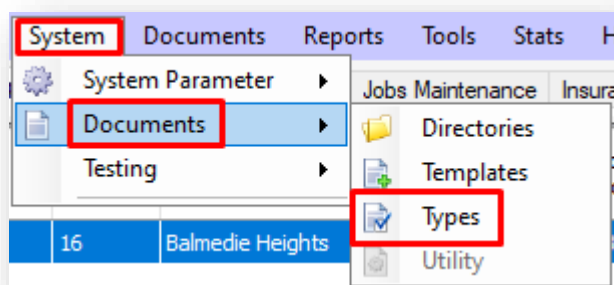
In this example, you place a tick against the **All Developments** option.



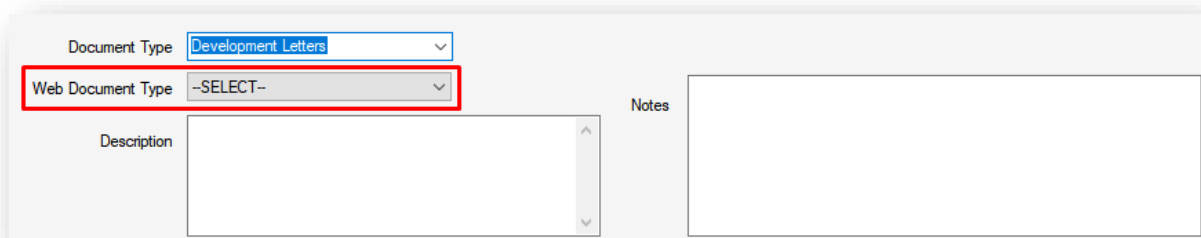
You will then need to select a **Document Type** for storing your document. Document Types categorise your document, enabling it to be searched for more easily in a document library. When you assign a document type to your document it will also control where it is received into, how it can be distributed or sent out and also the audience that the document will be able to be distributed to.



*The document types which appear in the drop-down list are the ones which are already available in your CPL database. You can edit the behaviour of existing types and create new types if required, by accessing the **Types** tool under the main **Documents** menu.*



The next option in the **Documents: Receive** screen is to select a **Web Document Type** for your document. You must select one to be able to have it appear in your portal for clients to download.

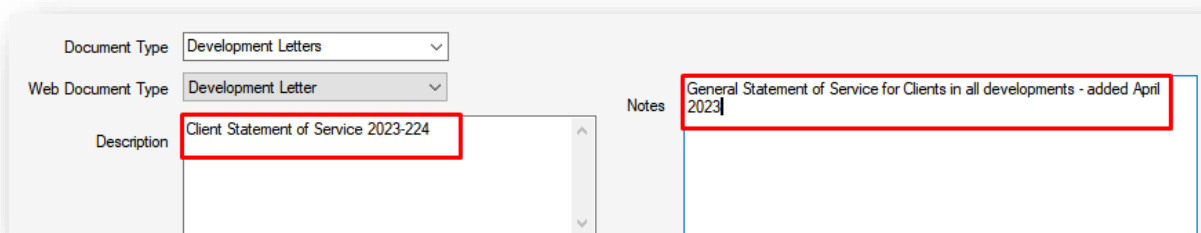


The list of web document types available to you will depend on which document types you asked us to set up for your Document tab on your client web portal. These act as sub-headers for your documents to appear under on the Documents tab itself.

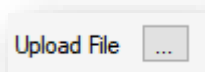
Click to select the relevant web document type for your document to appear under on your portal.

To make it easier to locate documents in document stores, you must add a **Description** for your document in the **Documents: Receive** screen. This description is also what your clients will see in the Documents tab on your portal.

If you wish to add any additional information which can be viewed internally by other users in your company then you can add this in the **Notes** section in the screen.



Click on the grey button to the right of the **Upload File** label to be able to browse to the location on your computer for the document you wish to make available.



When you have selected a document, the file path will appear on the screen.

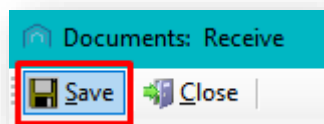
At the bottom of the Documents: Receive screen you will see an **Audience Type** field. This may appear to be greyed out without the option to change this setting. This is controlled by the **Document Type** selection you made above and if there was only one audience type selected originally for the document type then you will not be able to change this.

*Please be aware that the **Audience Types** selected for an individual document type can dictate who can see the document once it has been added to your portal. It is generally better to err on the side of caution and make sure this is set to **Private (Account Only)**. This will mean that if there are different versions of a document being distributed, the clients would see their version only.*

There is an option on this screen to tick **Print QR Code**. Tick this to print out a QR Code sticker for your physical document if this is something you already use in CPL.

☐ Print QR Code

Otherwise, ignore this option and click to **Save** your document in the top-left corner of the screen. The document will be listed in the relevant document library in CPL and will also be available on your portal.



Your document will become available for the appropriate clients to download under the relevant web document type on the Documents tab of your portal.

Development Letter			
Date Uploaded	Description	View Document	View Attachments
10/04/2023	Client Statement of Service 2023-224	Download Document	

OPTION 1B - UPLOADING A DOCUMENT TO THE MAIN RECEIVE IN AREA TO SHARE WITH INDIVIDUAL BLOCKS, PROPERTIES AND APPORTIONS

You can also choose to share the document with a selection of individual blocks, properties or apportionments from this screen.

To do this, click in the tick box to the left of **Multiple Developments / Block / Properties / Apportions**.

Source Type: Development

Development: [SELECT](#) ☐ All Developments ☒ Multiple Developments / Blocks / Properties / Apportions

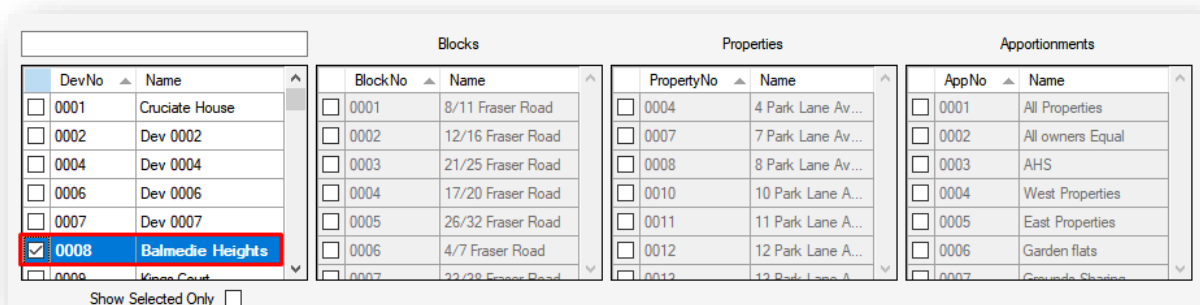
This will open a section at the bottom of the screen for you to make the relevant selections.

DevNo		Name	BlockNo		Name	PropertyNo		Name	AppNo		Name
<input checked="" type="checkbox"/>	0001	Cruciate House									
<input type="checkbox"/>	0002	Dev 0002									
<input type="checkbox"/>	0004	Dev 0004									
<input type="checkbox"/>	0006	Dev 0006									
<input type="checkbox"/>	0007	Dev 0007									
<input type="checkbox"/>	0008	Balmedie Heights									
<input type="checkbox"/>	0009	Kings Court									

Show Selected Only ☐

Within this section there are four standard selector boxes: **Developments**, **Blocks**, **Properties** and **Apportionments**.

When you click to highlight a development, the blocks, properties and apportionments for that development will appear in each section.



DevNo	Name
<input type="checkbox"/> 0001	Cruciate House
<input type="checkbox"/> 0002	Dev 0002
<input type="checkbox"/> 0004	Dev 0004
<input type="checkbox"/> 0006	Dev 0006
<input type="checkbox"/> 0007	Dev 0007
<input checked="" type="checkbox"/> 0008	Balmedie Heights
<input type="checkbox"/> 0009	Kings Court

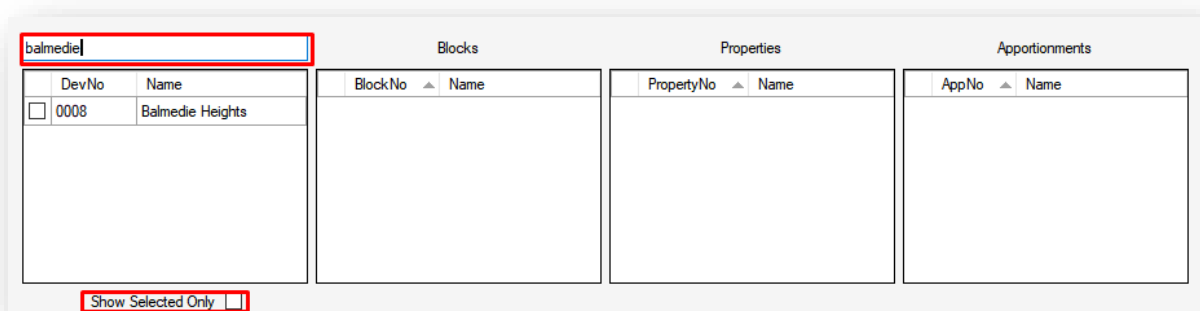
Show Selected Only ☐

BlockNo	Name
<input type="checkbox"/> 0001	8/11 Fraser Road
<input type="checkbox"/> 0002	12/16 Fraser Road
<input type="checkbox"/> 0003	21/25 Fraser Road
<input type="checkbox"/> 0004	17/20 Fraser Road
<input type="checkbox"/> 0005	26/32 Fraser Road
<input type="checkbox"/> 0006	4/7 Fraser Road
<input type="checkbox"/> 0007	23/28 Fraser Road

PropertyNo	Name
<input type="checkbox"/> 0004	4 Park Lane Av...
<input type="checkbox"/> 0007	7 Park Lane Av...
<input type="checkbox"/> 0008	8 Park Lane Av...
<input type="checkbox"/> 0010	10 Park Lane A...
<input type="checkbox"/> 0011	11 Park Lane A...
<input type="checkbox"/> 0012	12 Park Lane A...
<input type="checkbox"/> 0013	13 Park Lane A...

AppNo	Name
<input type="checkbox"/> 0001	All Properties
<input type="checkbox"/> 0002	All owners Equal
<input type="checkbox"/> 0003	AHS
<input type="checkbox"/> 0004	West Properties
<input type="checkbox"/> 0005	East Properties
<input type="checkbox"/> 0006	Garden flats
<input type="checkbox"/> 0007	Grounds Shaping

There is a **Search** box to enable you to search for Developments and display only those. It will list all developments where the Development ID or Development name contain your typed text:



balmedie

DevNo	Name
<input type="checkbox"/> 0008	Balmedie Heights

Show Selected Only ☐

BlockNo	Name
---------	------

PropertyNo	Name
------------	------

AppNo	Name
-------	------

There is also a **Show Selected Only** check box which will enable you to reduce the blocks, properties and apportionments displayed to only the ones relevant to your chosen Development.

You may wish select blocks, properties and/or apportionments to share your document with across several developments. The information below will help you make the appropriate selections.

SELECTING A DEVELOPMENT

If you tick the box against an individual development, then the document will be able to be shared with all clients in the development. In this case:

- The text for this development will change to bold text.
- The Blocks, Properties, and Apportionments sections would be disabled.

DevNo	Name	BlockNo	Name	PropertyNo	Name	AppNo	Name
<input type="checkbox"/> 0001	Cruciate House	<input type="checkbox"/> 0001	8/11 Fraser Road	<input type="checkbox"/> 0004	4 Park Lane Av...	<input type="checkbox"/> 0001	All Properties
<input type="checkbox"/> 0002	Dev 0002	<input type="checkbox"/> 0002	12/16 Fraser Road	<input type="checkbox"/> 0007	7 Park Lane Av...	<input type="checkbox"/> 0002	All owners Equal
<input type="checkbox"/> 0004	Dev 0004	<input type="checkbox"/> 0003	21/25 Fraser Road	<input type="checkbox"/> 0008	8 Park Lane Av...	<input type="checkbox"/> 0003	AHS
<input type="checkbox"/> 0006	Dev 0006	<input type="checkbox"/> 0004	17/20 Fraser Road	<input type="checkbox"/> 0010	10 Park Lane A...	<input type="checkbox"/> 0004	West Properties
<input type="checkbox"/> 0007	Dev 0007	<input type="checkbox"/> 0005	26/32 Fraser Road	<input type="checkbox"/> 0011	11 Park Lane A...	<input type="checkbox"/> 0005	East Properties
<input checked="" type="checkbox"/> 0008	Balmedie Heights	<input type="checkbox"/> 0006	4/7 Fraser Road	<input type="checkbox"/> 0012	12 Park Lane A...	<input type="checkbox"/> 0006	Garden flats
<input type="checkbox"/> 0009	Kings Court	<input type="checkbox"/> 0007	22/28 Fraser Road	<input type="checkbox"/> 0013	13 Park Lane A...	<input type="checkbox"/> 0007	Grounds Flats

SELECTING ONE OR MORE BLOCKS

If you tick one or more blocks in the **Blocks** selector, then your document will be able to be shared with clients in properties for those blocks only. In this case:

- The blocks will be ticked and will be displaying bold text
- The development will have a square in its box to signify that it is partially selected and the text will be in italics to signify you have selected blocks from this development but not the whole development.
- The Properties and Apportionments selectors will be disabled. This is because you cannot select whole blocks and also select properties or apportionments.

DevNo	Name	BlockNo	Name	PropertyNo	Name	AppNo	Name
<input type="checkbox"/> 0001	Cruciate House	<input checked="" type="checkbox"/> 0001	8/11 Fraser Ro...	<input type="checkbox"/> 0004	4 Park Lane Av...	<input type="checkbox"/> 0001	All Properties
<input type="checkbox"/> 0002	Dev 0002	<input type="checkbox"/> 0002	12/16 Fraser Road	<input type="checkbox"/> 0007	7 Park Lane Av...	<input type="checkbox"/> 0002	All owners Equal
<input type="checkbox"/> 0004	Dev 0004	<input checked="" type="checkbox"/> 0003	21/25 Fraser R..	<input type="checkbox"/> 0008	8 Park Lane Av...	<input type="checkbox"/> 0003	AHS
<input type="checkbox"/> 0006	Dev 0006	<input type="checkbox"/> 0004	17/20 Fraser Road	<input type="checkbox"/> 0010	10 Park Lane A...	<input type="checkbox"/> 0004	West Properties
<input type="checkbox"/> 0007	Dev 0007	<input checked="" type="checkbox"/> 0005	26/32 Fraser R.	<input type="checkbox"/> 0011	11 Park Lane A...	<input type="checkbox"/> 0005	East Properties
<input checked="" type="checkbox"/> 0008	Balmedie Heights	<input type="checkbox"/> 0006	4/7 Fraser Road	<input type="checkbox"/> 0012	12 Park Lane A...	<input type="checkbox"/> 0006	Garden flats
<input type="checkbox"/> 0009	Kings Court	<input type="checkbox"/> 0007	22/28 Fraser Road	<input type="checkbox"/> 0013	13 Park Lane A...	<input type="checkbox"/> 0007	Grounds Flats

SELECTING ONE OR MORE PROPERTIES

If you tick one or more properties in the **Properties** selector, then your document will be able to be shared with clients in only those properties. In this case:

- The properties will be ticked and will be displaying bold text
- The development will have a square in its box to signify that it is partially selected and the text will be in italics to signify you have selected properties from this development but not the whole development.
- The blocks and apportionments selectors will be disabled. This is because you cannot select individual properties and also select whole blocks or apportionments.

		Blocks		Properties		Apportionments	
DevNo	Name	BlockNo	Name	PropertyNo	Name	AppNo	Name
<input type="checkbox"/> 0001	Cruciate House	<input type="checkbox"/> 0001	8/11 Fraser Road	<input checked="" type="checkbox"/> 0004	4 Park Lane ...	<input type="checkbox"/> 0001	All Properties
<input type="checkbox"/> 0002	Dev 0002	<input type="checkbox"/> 0002	12/16 Fraser Road	<input type="checkbox"/> 0007	7 Park Lane Av...	<input type="checkbox"/> 0002	All owners Equal
<input type="checkbox"/> 0004	Dev 0004	<input type="checkbox"/> 0003	21/25 Fraser Road	<input checked="" type="checkbox"/> 0008	8 Park Lane ...	<input type="checkbox"/> 0003	AHS
<input type="checkbox"/> 0006	Dev 0006	<input type="checkbox"/> 0004	17/20 Fraser Road	<input checked="" type="checkbox"/> 0010	10 Park Lan...	<input type="checkbox"/> 0004	West Properties
<input type="checkbox"/> 0007	Dev 0007	<input type="checkbox"/> 0005	26/32 Fraser Road	<input type="checkbox"/> 0011	11 Park Lane A...	<input type="checkbox"/> 0005	East Properties
<input checked="" type="checkbox"/> 0008	Balmedie Heights	<input type="checkbox"/> 0006	4/7 Fraser Road	<input type="checkbox"/> 0012	12 Park Lane A...	<input type="checkbox"/> 0006	Garden flats
<input type="checkbox"/> 0009	Kings Court	<input type="checkbox"/> 0007	22/28 Fraser Road	<input type="checkbox"/> 0013	13 Park Lane A...	<input type="checkbox"/> 0007	Garden Sheds

SELECTING ONE OR MORE APPORTIONMENTS

If you tick one or more apportionments in the **Apportionments** selector, then your document will be able to be shared with clients only in those properties which are part of those apportionments. In this case:

- The apportionments will be ticked and will be displaying bold text
- The development will have a square in its box to signify that it is partially selected and the text will be in italics to signify you have selected apportionments from this development but not the whole development.
- The Blocks and Properties selectors will be disabled. This is because you cannot select individual apportionments and also select blocks or properties.

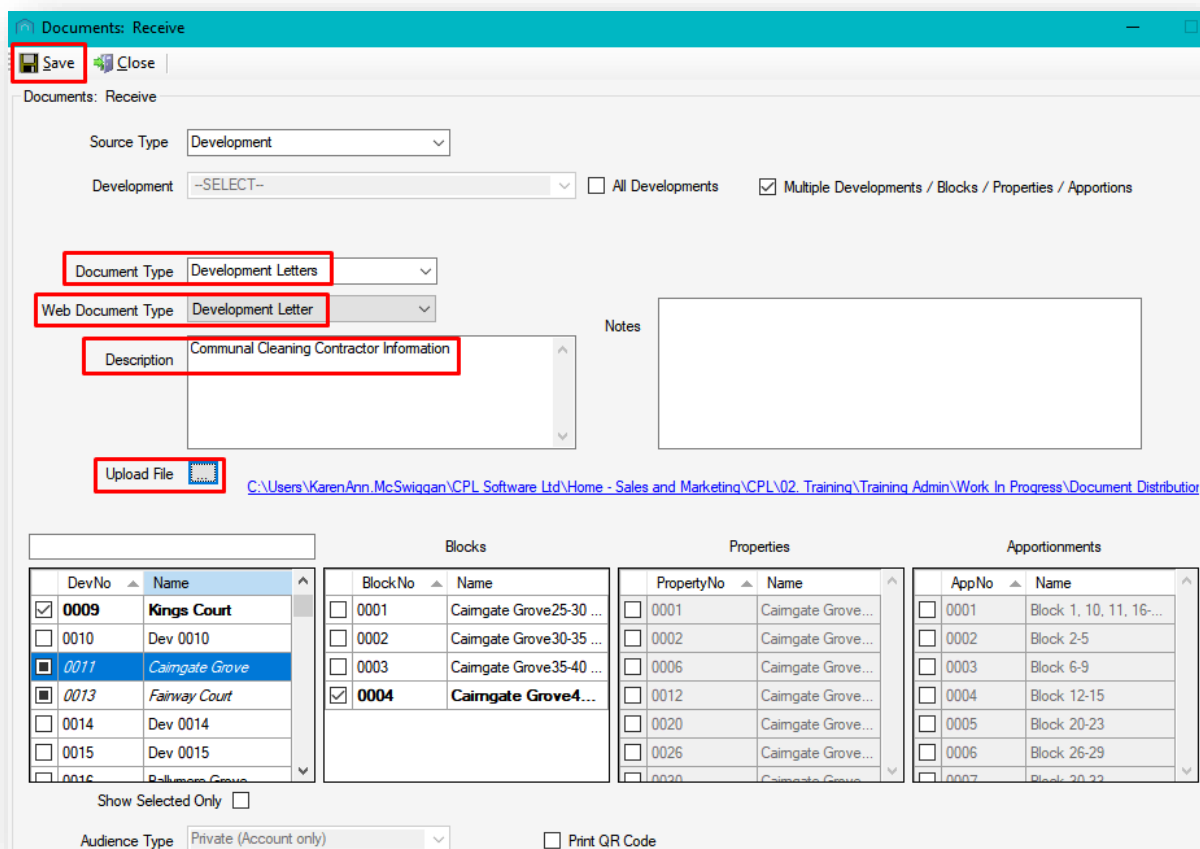
		Blocks		Properties		Apportionments	
DevNo	Name	BlockNo	Name	PropertyNo	Name	AppNo	Name
<input type="checkbox"/> 0001	Cruciate House	<input type="checkbox"/> 0001	8/11 Fraser Road	<input type="checkbox"/> 0004	4 Park Lane Av...	<input type="checkbox"/> 0001	All Properties
<input type="checkbox"/> 0002	Dev 0002	<input type="checkbox"/> 0002	12/16 Fraser Road	<input type="checkbox"/> 0007	7 Park Lane Av...	<input type="checkbox"/> 0002	All owners Equal
<input type="checkbox"/> 0004	Dev 0004	<input type="checkbox"/> 0003	21/25 Fraser Road	<input type="checkbox"/> 0008	8 Park Lane Av...	<input type="checkbox"/> 0003	AHS
<input type="checkbox"/> 0006	Dev 0006	<input type="checkbox"/> 0004	17/20 Fraser Road	<input type="checkbox"/> 0010	10 Park Lane A...	<input checked="" type="checkbox"/> 0004	West Properties
<input type="checkbox"/> 0007	Dev 0007	<input type="checkbox"/> 0005	26/32 Fraser Road	<input type="checkbox"/> 0011	11 Park Lane A...	<input checked="" type="checkbox"/> 0005	East Properties
<input checked="" type="checkbox"/> 0008	Balmedie Heights	<input type="checkbox"/> 0006	4/7 Fraser Road	<input type="checkbox"/> 0012	12 Park Lane A...	<input type="checkbox"/> 0006	Garden flats
<input type="checkbox"/> 0009	Kings Court	<input type="checkbox"/> 0007	22/28 Fraser Road	<input type="checkbox"/> 0013	13 Park Lane A...	<input type="checkbox"/> 0007	Garden Sheds

SELECTING ONE OR MORE DEVELOPMENTS

You are not restricted to selecting from only one development. Should you want to, then your document can be shared with clients from across several developments, selected in the same manner as above. You can mix your selection from whole developments (ticked), to blocks, properties and apportionments selected from other developments (appearing in italics).

		Blocks		Properties		Apportionments	
DevNo	Name	BlockNo	Name	PropertyNo	Name	AppNo	Name
<input checked="" type="checkbox"/> 0009	Kings Court	<input type="checkbox"/> 0001	Cairngate Grove25-30 ...	<input type="checkbox"/> 0001	Cairngate Grove...	<input type="checkbox"/> 0001	Block 1, 10, 11, 16...
<input type="checkbox"/> 0010	Dev 0010	<input type="checkbox"/> 0002	Cairngate Grove30-35 ...	<input type="checkbox"/> 0002	Cairngate Grove...	<input type="checkbox"/> 0002	Block 2-5
<input checked="" type="checkbox"/> 0011	Cairngate Grove	<input type="checkbox"/> 0003	Cairngate Grove35-40 ...	<input type="checkbox"/> 0006	Cairngate Grove...	<input type="checkbox"/> 0003	Block 6-9
<input checked="" type="checkbox"/> 0013	Fairway Court	<input checked="" type="checkbox"/> 0004	Cairngate Grove4...	<input type="checkbox"/> 0012	Cairngate Grove...	<input type="checkbox"/> 0004	Block 12-15
<input type="checkbox"/> 0014	Dev 0014			<input type="checkbox"/> 0020	Cairngate Grove...	<input type="checkbox"/> 0005	Block 20-23
<input type="checkbox"/> 0015	Dev 0015			<input type="checkbox"/> 0026	Cairngate Grove...	<input type="checkbox"/> 0006	Block 26-29
<input type="checkbox"/> 0016	Bullmore Grove			<input type="checkbox"/> 0028	Cairngate Grove...	<input type="checkbox"/> 0007	Block 30-33

Having made your decisions for sharing your document, remember to make your selections and upload your document in the other fields in this screen.



Documents: Receive

Save Close

Source Type: Development

Development: --SELECT-- ☐ All Developments ☒ Multiple Developments / Blocks / Properties / Apporionments

Document Type: Development Letters

Web Document Type: Development Letter

Description: Communal Cleaning Contractor Information

Notes:

Upload File <C:\Users\KarenAnn.McSwiggan\CPL Software Ltd\Home - Sales and Marketing\CPL\02. Training\Training Admin\Work In Progress\Document Distribution>

DevNo	Name
<input checked="" type="checkbox"/> 0009	Kings Court
<input type="checkbox"/> 0010	Dev 0010
<input checked="" type="checkbox"/> 0011	Cairgate Grove
<input checked="" type="checkbox"/> 0013	Fairway Court
<input type="checkbox"/> 0014	Dev 0014
<input type="checkbox"/> 0015	Dev 0015
<input type="checkbox"/> 0016	Dev 0016

Show Selected Only ☐

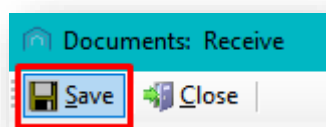
BlockNo	Name
<input type="checkbox"/> 0001	Cairgate Grove25-30 ...
<input type="checkbox"/> 0002	Cairgate Grove30-35 ...
<input type="checkbox"/> 0003	Cairgate Grove35-40 ...
<input checked="" type="checkbox"/> 0004	Cairgate Grove4...

PropertyNo	Name
<input type="checkbox"/> 0001	Cairgate Grove...
<input type="checkbox"/> 0002	Cairgate Grove...
<input type="checkbox"/> 0006	Cairgate Grove...
<input type="checkbox"/> 0012	Cairgate Grove...
<input type="checkbox"/> 0020	Cairgate Grove...
<input type="checkbox"/> 0026	Cairgate Grove...
<input type="checkbox"/> 0029	Cairgate Grove...

AppNo	Name
<input type="checkbox"/> 0001	Block 1, 10, 11, 16-...
<input type="checkbox"/> 0002	Block 2-5
<input type="checkbox"/> 0003	Block 6-9
<input type="checkbox"/> 0004	Block 12-15
<input type="checkbox"/> 0005	Block 20-23
<input type="checkbox"/> 0006	Block 26-29
<input type="checkbox"/> 0007	Block 30-33

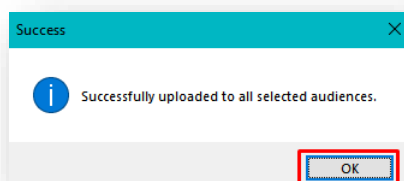
Audience Type: Private (Account only) ☐ Print QR Code

Don't forget to click on **Save** in the top-left of the screen when you have finished.



CPL will warn you that it may take a while to complete your selection and then confirm when this is completed.

You can click on **OK** to dismiss the confirmation.



Your document will become available for the appropriate clients to download under the relevant web document type on the Documents tab of your portal.

Development Letter			
Date Uploaded	Description	View Document	View Attachments
20/04/2023	Communal Cleaning Contractor Information	Download Document	
10/04/2023	Client Statement of Service 2023-224	Download Document	

OPTION 1C - UPLOADING A DOCUMENT TO A SPECIFIC DOCUMENT AREA IN CPL

In the example below, a document is being uploaded to the **Documents** tab within an individual development.

The screenshot shows the 'Amend 0008 Balmedie Heights' window. The top section displays summary information: Development 0008 Balmedie Heights, Total Properties 16, Total Blocks 7, Property Manager KA. Financial summary includes Total Allocated Charges 3473.21, Total Hold File 118347.90, Difference 114874.69, Development Balance £16,746.56, Balance Due £16,746.56, and EAE 0.00. The bottom navigation bar has the 'Documents' tab highlighted with a red box.

You can either click on the **Receive** icon in the action panel on the left or just drag the document you wish to upload onto the screen.

The screenshot shows the 'Documents History' screen. On the left, the 'Receive' icon in the action panel is highlighted with a red box. The main area contains a table of document history with columns: Date Time, Document Type, Description, User, Sent / Received, Deleted, Read / Unread, and Web Document Type. The table lists several documents, including 'Bin Store Complaint', 'Bin Store and Domestic Items Reminder', 'Bin Store Roof Repair - Request for Vo...', 'Landscaper Information', 'April Contractor Notification Letter', 'Replace Bark Mulch in Play Area Feb ...', and 'Notification of Change of Landscaping...'. The 'Receive' icon is also highlighted in the left action panel.

Either of the above methods will load the **Documents Receive** screen as long as you have the System Setting activated for this. *Please contact CPL Support if you would like more information on this.*

If you have dragged the file onto the Documents tab then it will already be linked for upload and you won't have to click to browse for your file.

Depending on the location of the document library you are uploading your document to, you may see different fields at the top of the screen.

In the example below, you will note that this is the Documents tab within an individual development.

The **Source Type** and **Development** fields are greyed out because an individual development has already been selected before bringing the document in.

*Please note, If you would like to choose to share the document with individual blocks, properties or apportionments then you will need to receive the document in through the main **Receive In** screen under **Documents** in the main header bar of CPL and information about this can be found in the previous section - Option 1B - Uploading a Document to the main Receive In Area to share with Individual Blocks, Properties and Apportionments.*

If the document has come from a Development Contact, then this contact can be selected in the **Contact** field. Otherwise, you can leave this as **None**.

As in the section described above in Option 1A, you can continue on to select a **Document Type** and a **Web Document Type** as appropriate for your purpose. Remember that the selection you make in the Web Document Type field will control which of the sub-headings your document will appear under in the Documents tab on your portal.

Documents: Receive

Source Type

Development

Contacts

Document Type

Web Document Type

If you dragged your document into the Documents screen, then the **Description** will be set automatically as **Import document received**.

Description

You should click into the field to edit this default description as otherwise, your clients will see the document labelled as this in the portal.

Description

If you dragged your document into the Documents tab as mentioned above, then the file path to your document will already appear and you will not need to click on an upload link to browse for your document.

Document Type

Description

Notes

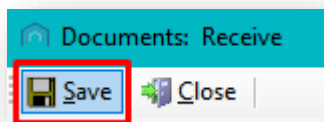
<C:\Users\KarenAnn.McSwiggan\CPL Software Ltd\Home - Sales and Marketing\CPL\02. Training\Training Admin\Work In Progress\Blockworx\Quotes In>

If the Document Type you have selected has more than one Audience Type selected against it, then you can select a specific Audience Type for this document. Otherwise, this option may be greyed out.

Audience Type Private (Account only) ▾

If required, you can place a tick beside the **Print QR Code** option.

Otherwise, ignore this option and click to **Save** your document in the top-left corner of the screen. The document will be listed in the relevant document library in CPL and will also be available on your portal.

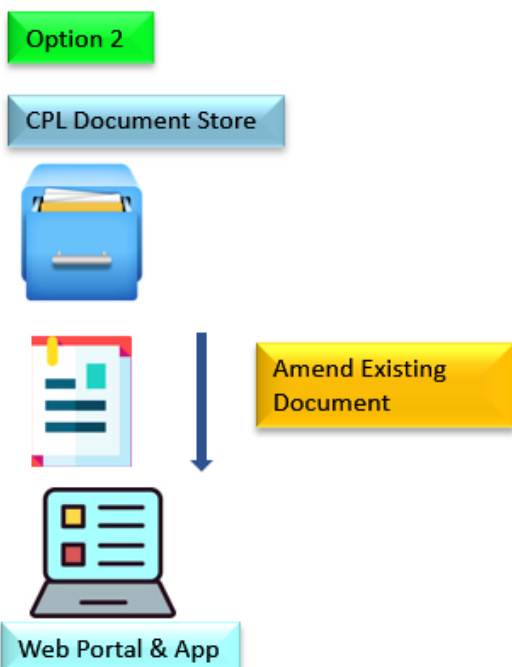


Your document will become available for the appropriate clients to download under the relevant web document type on the Documents tab of your portal.

Development Letter		
Date Uploaded	Description	View Document
20/04/2023	Balmedie Heights Development Site Plan	Download Document

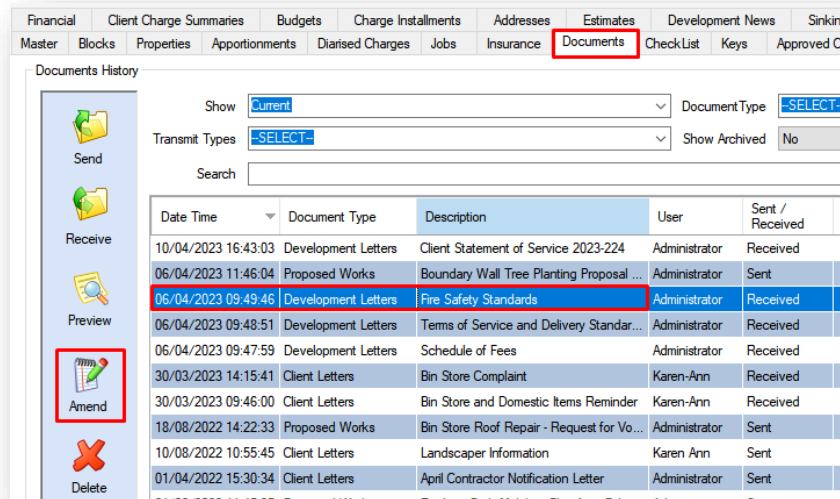
OPTION 2 - MAKING A PREVIOUSLY UPLOADED DOCUMENT AVAILABLE IN YOUR CLIENT WEB PORTAL

This section will cover the steps required to make a document available on your portal which has previously been uploaded to a documents area within CPL.



If you have previously uploaded a document to a document library in CPL, or sent a document out to clients through the Documents Distribute screen, you can amend the document to make it available in your portal.

To do this, navigate to the appropriate document library and click to highlight the document in the grid you wish to make available in your portal and click on the **Amend** option in the action panel to the left of the grid.



The **Amend Document** screen will launch and you will note that if the document has not already been shared to the portal, then the **Web Type** field will be set at **Select**.

Amend Document

Description: Fire Safety Standards

Deleted? ☐

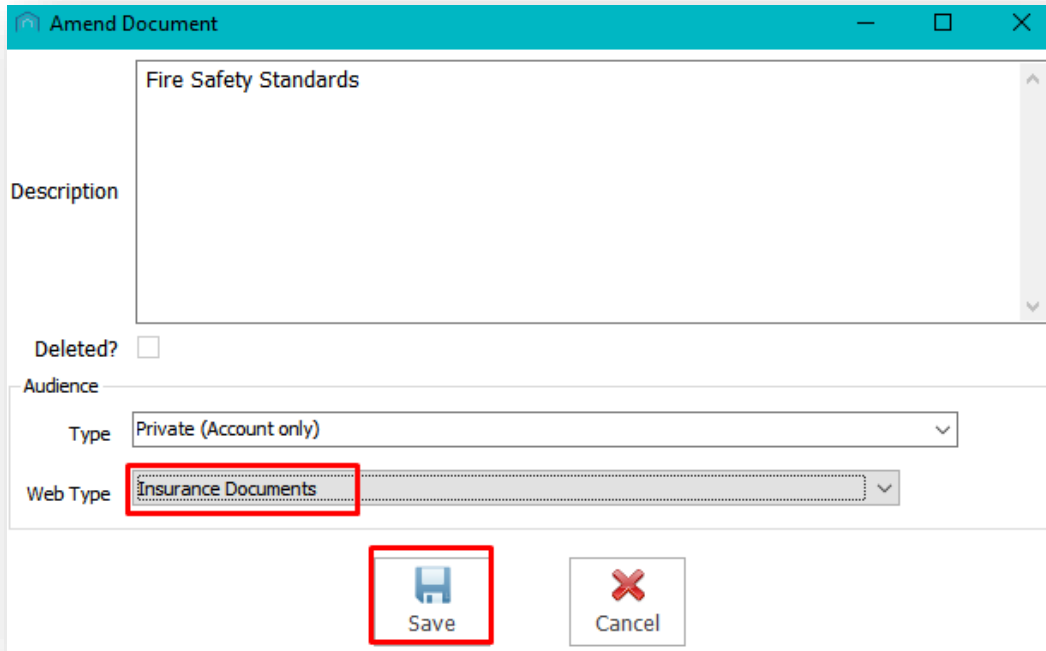
Audience Type: Private (Account only)

Web Type: --SELECT--

Save Cancel

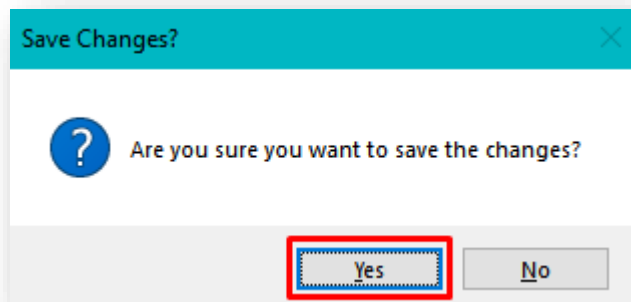
This means a web document type has not already been chosen. Click on the drop-down arrow and the list of your web document types will appear.

Click to select the relevant web document type for your document to appear under on your portal and then click on the **Save** option at the bottom of the screen.



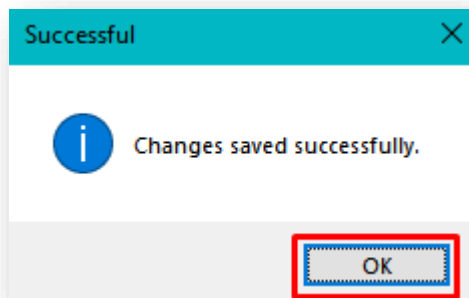
The 'Amend Document' dialog box has a teal header with a home icon and the title 'Amend Document'. It contains a 'Description' field with the text 'Fire Safety Standards'. Below this is a 'Deleted?' checkbox which is unchecked. Under the 'Audience' section, the 'Type' dropdown is set to 'Private (Account only)'. The 'Web Type' dropdown is set to 'Insurance Documents', which is highlighted with a red rectangle. At the bottom, there are two buttons: 'Save' (with a floppy disk icon) and 'Cancel' (with a red X icon). The 'Save' button is also highlighted with a red rectangle.

Click **Yes** on the **Save Changes** screen to confirm.



The 'Save Changes?' dialog box has a teal header with a close icon. It features a question mark icon and the text 'Are you sure you want to save the changes?'. At the bottom, there are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red rectangle.

CPL will confirm it has done this and you can click on **OK** to dismiss the confirmation screen.



The 'Successful' dialog box has a teal header with a close icon. It features an information icon and the text 'Changes saved successfully.'. At the bottom, there is a single button labeled 'OK', which is highlighted with a red rectangle.

You will note that the grid in the Documents tab now displays a Web Document Type against this document.

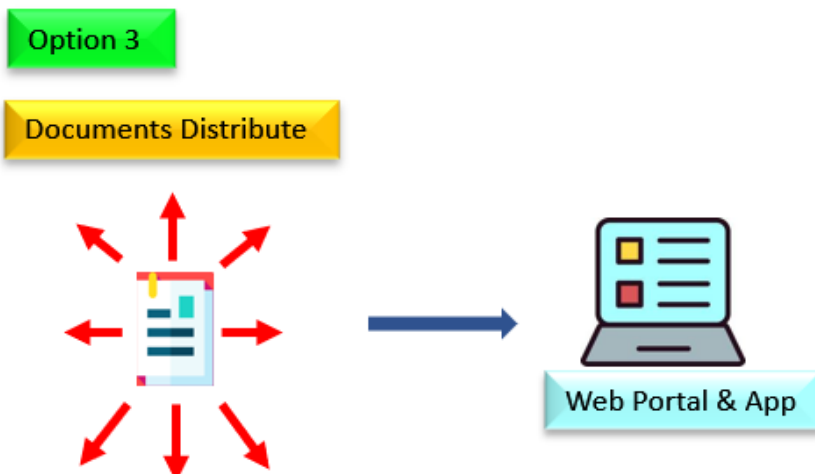
Date Time	Document Type	Description	User	Sent / Received	Deleted	Read / Unread	Web Document Type
10/04/2023 16:43:03	Development Letters	Client Statement of Service 2023-224	Administrator	Received	<input type="checkbox"/>	<input type="checkbox"/>	Development Letter
06/04/2023 11:46:04	Proposed Works	Boundary Wall Tree Planting Proposal ...	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	Development Letter
06/04/2023 09:49:46	Development Letters	Fire Safety Standards	Administrator	Received	<input type="checkbox"/>	<input type="checkbox"/>	Insurance Documents
06/04/2023 09:48:51	Development Letters	Terms of Service and Delivery Standar...	Administrator	Received	<input type="checkbox"/>	<input type="checkbox"/>	Development Letter
06/04/2023 09:47:59	Development Letters	Schedule of Fees	Administrator	Received	<input type="checkbox"/>	<input type="checkbox"/>	Client Letter

Your document will become available for the appropriate clients to download under the relevant web document type on the Documents tab of your portal.

Insurance Documents		
Date Uploaded	Description	View Document
06/04/2023	Fire Safety Standards	Download Document

MAKING A DOCUMENT AVAILABLE WHILST SENDING IT OUT

The following section will cover how you can distribute a document via the Documents Distribute screen whilst also choosing to make it accessible in your portal.

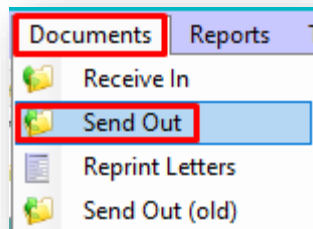


OPTION 3 – DISTRIBUTING A DOCUMENT AND MAKING IT AVAILABLE IN YOUR CLIENT WEB PORTAL

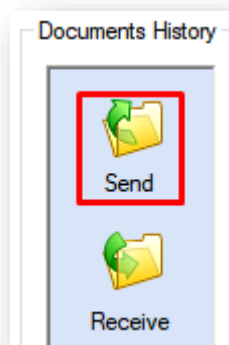
You can choose to make a document available on your portal as part of the Documents Distribute process in CPL.

You may wish to access the CPL Mail Merge Training Guide for additional support but a summary of this process related to choosing a Web Document Type is covered below.

In order to send out a document to your clients, you will click on the main **Send Out** option under the **Documents** header.

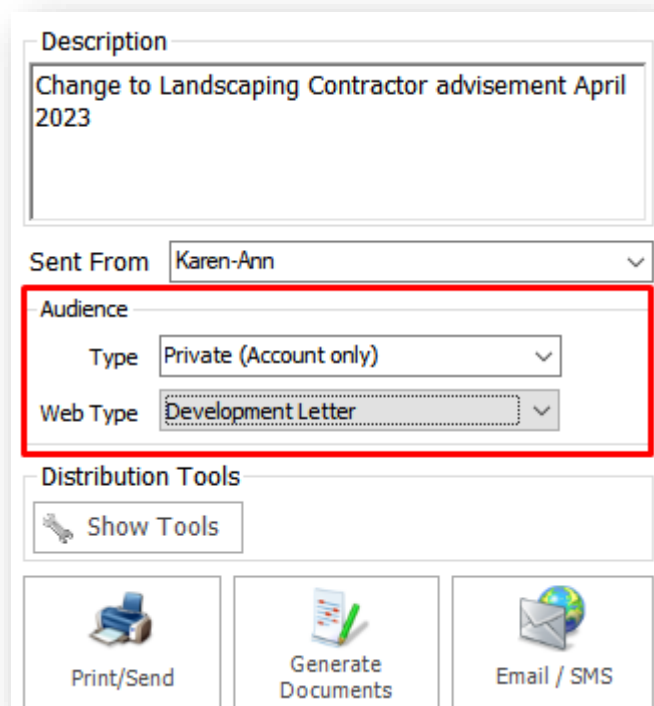


Alternatively, you can click on the **Send** option in the left-hand action bar in any document library in CPL.



There are also other areas, for example, within a Proposed Work when you click on the **Request Votes** or **Request Payment** button, which will launch the **Documents: Distribute** screen.

On the Documents: Distribute screen, there is an **Audience** section available in the left-hand column.


 A screenshot of the 'Documents: Distribute' screen. It features a 'Description' field with the text 'Change to Landscaping Contractor advisement April 2023'. Below this is a 'Sent From' dropdown menu showing 'Karen-Ann'. The 'Audience' section is highlighted with a red rectangle and contains a 'Type' dropdown menu set to 'Private (Account only)' and a 'Web Type' dropdown menu set to 'Development Letter'. Below the 'Audience' section is a 'Distribution Tools' section with a 'Show Tools' button. At the bottom, there are three buttons: 'Print/Send' (with a printer icon), 'Generate Documents' (with a document icon), and 'Email / SMS' (with an envelope icon).

This contains both a **Type field**. This will enable you to select **Private (Account Only)** to make sure that each client can only access their own mail merged version of the template and not all clients' versions.

There is also a **Web Type** field which will enable you to make sure that the distributed template can appear under the appropriate sub-heading in your portal.

You can continue with the remainder of the Documents Distribute process as you normally would. The process will still send the required documents to your printer for postage to the relevant clients and will email the copies through to the email clients. However, it will also make the document you are sending out available to the relevant clients on your portal.

Development Letter		
Date Uploaded	Description	View Document
10/04/2023	Client Statement of Service 2023-224	Download Document
06/04/2023	Boundary Wall Tree Planting Proposal Information	Download Document

Remember that the web types available will depend on the ones you asked us to create when we set up the Documents tab on your portal.

REMOVING A DOCUMENT FROM YOUR CLIENT WEB PORTAL


To stop a document appearing for download in your portal is a simple process of amending the document and removing the Web Document Type you have assigned to it. Without a web document type it will no longer appear on your portal.

To do this, access the document in the appropriate document area. In the example below, a document has been uploaded to an individual development's document tab and shared to the portal from there.


Make your way to Document tab where the document was initially added.

Click on the document in the grid and click on the **Amend** button on the action bar to the left of the grid.


Documents History




Send



Receive



Preview



Amend

Show

Current

Document Type

-SELECT-

Transmit Types

-SELECT-

Show Archived

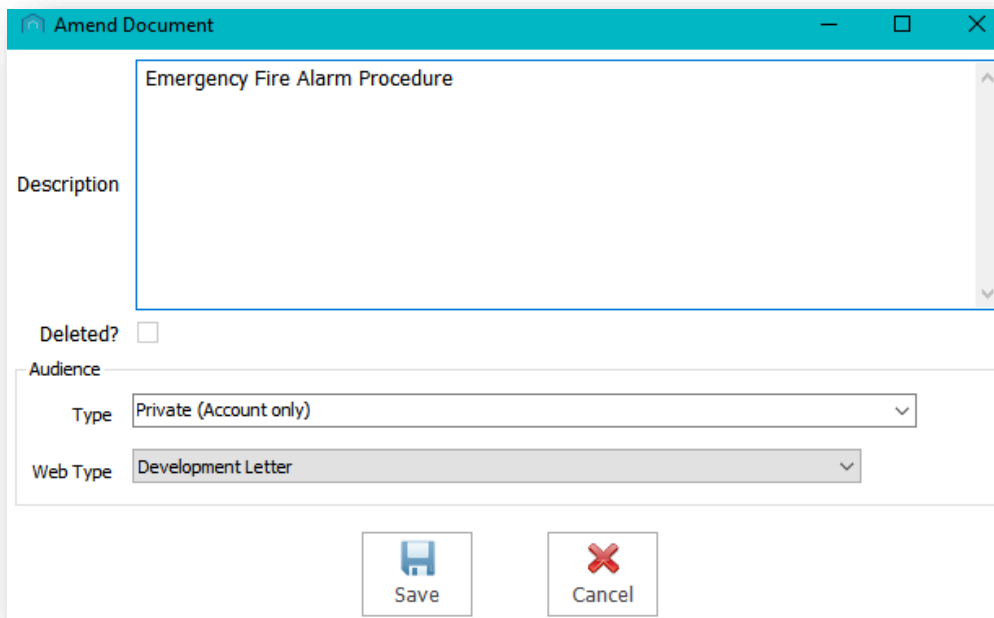
No

Search

Refresh

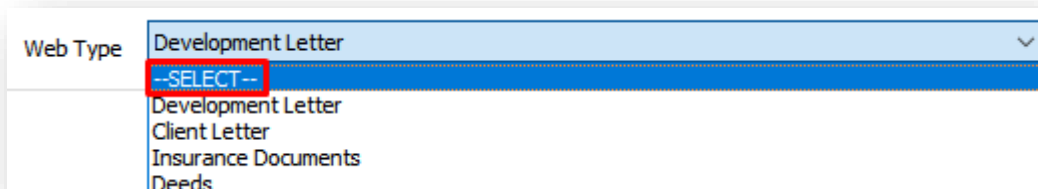
Date Time	Document Type	Description	User	Sent / Received	Deleted	Read / Unread	Web Document Type
10/04/2023 16:43:06	Development Letters	Client Statement of Service 2023-224	Administrator	Received	<input type="checkbox"/>	<input type="checkbox"/>	Development Letter
20/02/2023 09:58:01	Proposed Works	Bin Store Area Painting Work	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	
21/02/2022 15:47:18	Proposed Works	Roof Repair - Request for Payment	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	
24/06/2019 10:05:41	Client Letters	Terms of Service Document - Intro Letter	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	Client Letter
19/03/2019 10:19:38	Client Letters	Terms of Service Document - Intro Letter	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>	Development Letter
28/02/2019 17:03:47	Misc	Import document received	Administrator	Received	<input type="checkbox"/>	<input type="checkbox"/>	
28/02/2019 16:22:44	Misc	Emergency Fire Alarm Procedure	Administrator	Received	<input type="checkbox"/>	<input type="checkbox"/>	Development Letter
28/02/2019 16:15:52	Misc	Import document received	Administrator	Received	<input type="checkbox"/>	<input type="checkbox"/>	

This will open the **Amend Document** screen.



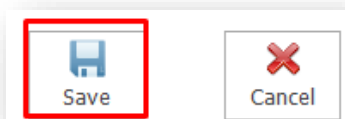
The 'Amend Document' window shows a document titled 'Emergency Fire Alarm Procedure'. It includes a 'Description' field, a 'Deleted?' checkbox, an 'Audience' section with 'Type' set to 'Private (Account only)' and 'Web Type' set to 'Development Letter'. At the bottom are 'Save' and 'Cancel' buttons.

Click on the **Web Type** drop-down menu and choose to set it back to **Select**.



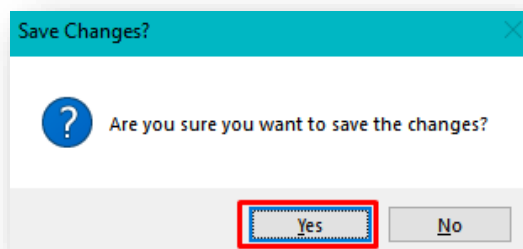
The 'Web Type' drop-down menu is open, showing options: 'Development Letter', '--SELECT--', 'Development Letter', 'Client Letter', 'Insurance Documents', and 'Deeds'. The '--SELECT--' option is highlighted with a red box.

When you have done this, click on the **Save** option at the bottom of the screen.



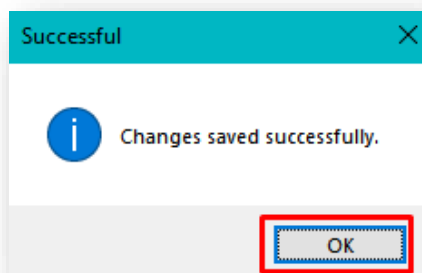
The 'Save' and 'Cancel' buttons are shown at the bottom of the screen. The 'Save' button is highlighted with a red box.

Click **Yes** to confirm that you do wish to make the change.



A 'Save Changes?' dialog box appears with the question 'Are you sure you want to save the changes?'. It has 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box.

You can then click on **OK** to dismiss CPL's confirmation.

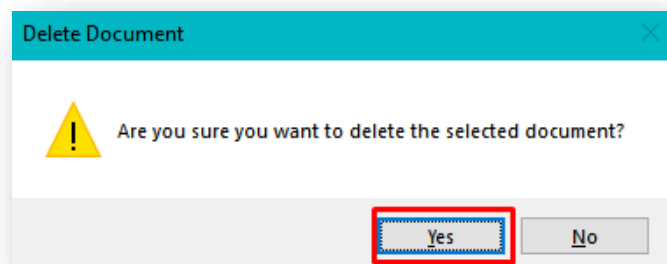


This will remove the document from your portal whilst allowing the document to remain in your document library.

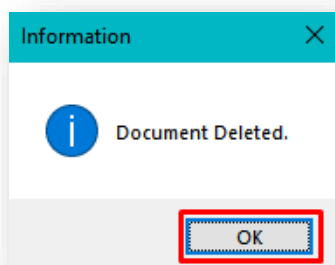
Alternatively, if you wish to remove the document completely from CPL, click to highlight your document in the grid and click on the **Delete** option in the action bar to the left of the grid.



You will be asked to confirm your deletion.



You can then click on **OK** to dismiss CPL's confirmation of the deletion.



This will remove the document from your portal and your document library.

If the document was allocated to multiple developments, it will remove the document for all clients in all developments it was allocated to.

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).