



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

HELPSHEET – CLIENT PORTAL TAB OPTIONS

INTRODUCTION

The CPL Client Portal gives you a company branded online space to share information and allow your clients to pay and interact with you online. Your company name, logo, company colours and information can be part of your portal.

The Client Portal and App integrate with your CPL database and clients can self-serve payments and access information at the click of a button. It can also provide an easier method for you to communicate with them 24/7.

There is a consistency in design and in client interaction across all of the tabs available for the client portal.

All descriptions on each tab of the client web portal are customisable by your company.

The App gives the majority of the content and experience of the web portal with the added benefit of being able to receive notifications.

ACCESSING THE CLIENT PORTAL AND APP

You would be provided with an impersonator account to allow you to log in as different client accounts to enable you to view information as they see it.

There are different options for how you would like to give your clients access to your web portal which is listed at the end of this helpsheet but please get in touch if you would like to discuss this.

Two Factor Authentication can be activated on your client portal. If this was turned on for your users then they'd add their email address and then the system would send an email with a pin which they would add to be able to access the portal each time they log in.

LOG ON

Logging on will take your client to the **Home** page which is common to all clients in that development.

Unless your company has subscribed to additional portal modules, the default portal tabs are **Home** and **Accounts**.

CLIENT INFORMATION – ON THE RIGHT

This information won't change as we go through the other sections of the portal. It will always inform your clients about their **Outstanding Balance** and give them an option to **Make Payment** or **Set Up Direct Debit** if you have this second option configured.

Your Outstanding Balance

Current Balance: £3,405.31

MAKE PAYMENT


SET UP DIRECT DEBIT

DEVELOPMENT AND PROPERTY MANAGER INFORMATION – ON THE RIGHT

This information will also be static on the right of any screen as the client navigates through the portal.

Details of the Property/ Development and the contact details for the Property Manager can appear here along with an image of the property manager if this has been added in the Amend User screen in CPL.

Property Manager Information



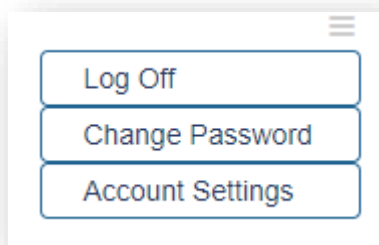
Property Manager
Karen-Ann

Phone Number
0345 646 0240

Email Address
Karen-Ann.McSwiggan@cplsoftware.com

UPDATING CLIENT INFORMATION

Clients can update their account information by using the menu in the top right-hand corner:

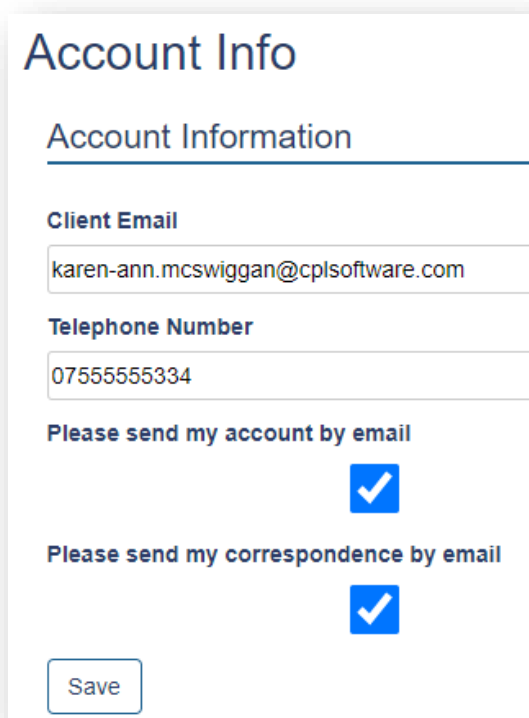


A white dropdown menu with a hamburger icon in the top right corner. It contains three blue-outlined buttons stacked vertically: "Log Off", "Change Password", and "Account Settings".

If a client hasn't already set up a direct debit arrangement, then you could provide this option in the client portal. This would require additional sign up with a provider and some configuration of your client portal.

ACCOUNT SETTINGS

If a client clicks on this then they would be able to update the email address and telephone number held on the system for them. It also allows the client to decide to have their correspondence and accounts sent by email by ticking in the box and this would then flow through to the client account on your CPL database.



A form titled "Account Info" with a sub-header "Account Information". It contains the following fields and options:

- Client Email**: A text input field containing "karen-ann.mcswiggan@cplsoftware.com".
- Telephone Number**: A text input field containing "07555555334".
- Please send my account by email**: A checkbox that is checked, indicated by a blue checkmark icon.
- Please send my correspondence by email**: A checkbox that is checked, indicated by a blue checkmark icon.
- Save**: A button at the bottom left of the form.

Clients can choose to link additional properties managed by your company that they may own to a single portal login by clicking on the **Add Property** option.



A blue button with white text that says "Add Property".

Once they have done this, when they log on, they will get the option to select the individual property they wish to view details for.

Properties		
Account No	Property Address	
00030081	2/4 Sandshaw Avenue Baillieston Glasgow	View Details
00020021	2 Lonbain Crescent Anniesland Glasgow	View Details
00020031	3 Lonbain Crescent Anniesland Glasgow	View Details

HOME TAB

All companies get the **Home Tab** as standard as this is essentially a welcome page for the portal.

Development News

Development News

Archives

Welcome Note

Welcome to your new property and to your online portal. Your portal allow you to interact electronically with us as your managing agent for your property. Here you will be able to see a number of things related to your account and the development including details of your account, the invoices we have raised to you, the payments you have made, the balance on your account and also ...

18 September 2019

View Post

You can add anything at all here that you'd like to inform your clients about through your CPL database. This can be added per development or for all developments as part of a bulk process.

The **View Post** link will expand the information seen on the screen if it is a longer piece of news.

ACCOUNTS TAB

The **Accounts** tab will always display a list of recent invoices with the most recent displaying at the top of the list. We can set this for a number of months as per your requirements. For example, you can choose to have your clients access the last 12 months of invoices or the last 24.

Statement of Account

[DOWNLOAD STATEMENT](#)

You can edit what goes here 4

Transaction Date	Description	Invoice No	Type	Amount	Balance	View Invoice
17/09/2019	Test Account Transaction		Debit	£17.95	£3,405.31	
17/09/2019	Test Account Transaction		Debit	£48.77	£3,387.36	
▼ 28/06/2019	Invoice for Charges to 01/07/2019	625724	Debit	£0.00	£3,338.59	Download Invoice
▼ 27/06/2019	Invoice for Charges to 01/07/2019	625648	Debit	£300.30	£3,338.59	Download Invoice
▼ 18/06/2019	Amended Invoice for Charges to	624059	Debit	£200.00	£3,038.29	Download Invoice
▼ 04/06/2019	Invoice for Charges to 01/07/2019	623795	Debit	£2,909.81	£2,838.29	Download Invoice
▼ 19/03/2019	minus amot - Purchase invoice - Transaction File	622512	Debit	£152.22 CR	£71.52 CR	Download Invoice

The client can also click on the **Download Statement** button to generate their own statement straight from this screen.

[DOWNLOAD STATEMENT](#)

This will allow them to set a date range to display the details of all invoices issued and payments made within that period and it will utilise your statement template and download as a PDF file for them.

Download Statement

From

To

[DOWNLOAD](#)
[CANCEL](#)

On each of your developments in CPL you can set options to allow the client invoices to be expanded into their individual charges and also choose to allow them to access the PL Invoices if you have brought these on through the In-Tray or they've come from contractors using Blockworx.

10/11/2020	Invoice for Charges to 01/01/2021	627347	Debit	£151.42	£151.42	Download Invoice
Charge Date	Description	Invoice No	Full Amount	Share Divide	Share Amount	View PL Invoice
01/01/2021	Management Fee SJC Test		£54.00	1/1	£54.00	
10/11/2020	Installing Door Entry System		£1,000.00	3/35	£85.72	
10/11/2020	Roof Repair to all bin stores		£2,000.00	3/35	£171.43	
01/10/2020	Contingency Fund - Flood Defences		£0.71	1/1	£0.71	
01/10/2020	Contingency Fund - Roof Replacement Fund		£0.71	1/1	£0.71	
09/09/2020	Tree surgeon work	345938479	£120.00	3/35	£10.28	Download PL Invoice
07/09/2020	Replacement of north wall guttering - Paid in Advance		£171.43 CR	1/1	£171.43 CR	

The following tabs are add-ins to the basic Client Web Portal.

You can have your own customised descriptions appear at the top of each of these additional tabs.

DOCUMENTS TAB

The Documents tab can be used to enable your clients to view and download any letters or documents which have been shared via the **Web Document Type** field from CPL. This can give your clients much better access to any documents you wish to share with them without the need to email or post these out.

You can ask us to set up various Web Document Types which act as sub-headings for documents you are making available for your clients to view on this tab. In the example below, the types selected are Fire Safety Documents, Insurance and Key Development Information. However, these could be whatever you would like. For example, you could have a Written Statement of Service web type set up and share your WSS each time you are disseminating this.

Fire Safety Documents			
Date Uploaded	Description	View Document	View Attachments
26/02/2024	Little Square Fire Alarm Contract Inspection Report Feb 2024	Download Document	
Insurance			
Key Development Information			

Documents will be able to appear under these sub-headings each time you are receiving documents into your database or sending documents out simply by selecting a web document type.

Fire Safety Documents			
Date Uploaded	Description	View Document	View Attachments
26/02/2024	Little Square Fire Alarm Contract Inspection Report Feb 2024	Download Document	

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

PROPOSED WORK TAB

The Proposed Work tab enables your clients to access detailed information relating to any current proposed works. They can get information which wouldn't be available to them anywhere else. For example, they could see what votes have already come in and funds that may still be outstanding.

The **List** option will display a grid containing all details for the proposed work including the **Status** which will tell them what stage it is at, whether it is **Voting Only** or **Normal**, the **Target** amount for the work and what has been **Achieved** towards that target so far.

List

Details

Documents

No	Created	Name	Description	Status	Type	Target	Achieved
20227	05/03/2020 10:05:30	Door for External Bin Store	Door to be fitted to external bin store	Awaiting Client Funds	Normal	£600.00	£0.00
20226	03/03/2020 16:31:50	Extension to entrance wall	Proposed extension to entrance wall for Albert Quay	Awaiting Client Funds	Normal	£1000.00	£0.00

When a proposed work is selected, there is a summary of information for the individual client at the top of the screen for the progress made on that individual proposed work. For example, if they have already voted or whether they have the option to make a payment or have already paid.

List
Details
Documents

You Voted

FOR

AGAINST

£120.00 share outstanding to be paid.

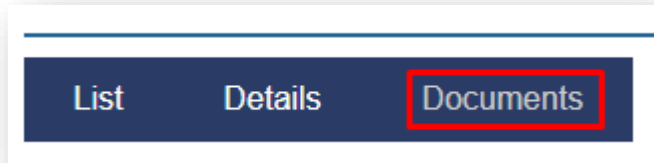
MAKE PROPOSED WORK PAYMENT

PROPOSED WORK - DETAILS

If the client clicks to access one of the listed Proposed Works the tab at the top will move to the **Details** option.

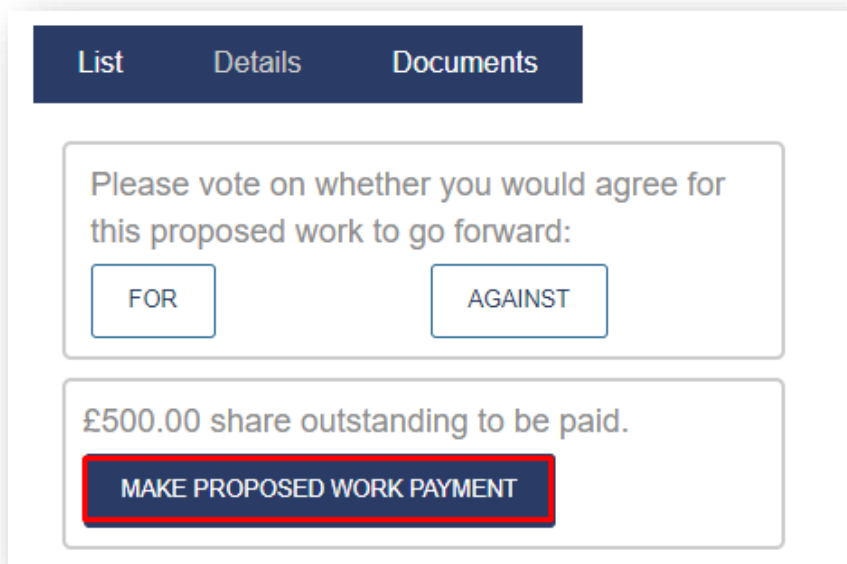
PROPOSED WORK – DOCUMENTS

There is also a **Documents** sub-tab in this section showing you all documents which have been issued relating to individual proposed works.



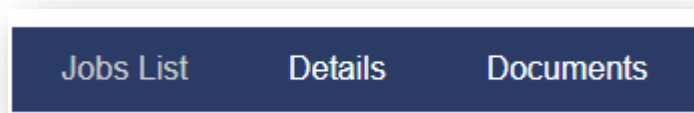
PROPOSED WORK – MAKE A PAYMENT

The client can click to make a payment directly from this screen if it is not a voting only proposed work.



JOBS TAB

The **Jobs** tab has a similar look and feel to the Proposed Work tab on the Client Portal. It has the same row of tabs covering the **Jobs List**, **Details** and **Documents**.



Underneath this is a grid which will list all jobs which are in progress for the client's development.

Order No	Date Created	Description	Contractor	Status	Last Updated
5501301	24/04/2020	Please clean blockage from gutter on sou...	1004 HandyMan 101	Job In Progress	24/04/2020
5501201	24/04/2020	Please check and repair aerial on main r...	1003 Electrician 101	Job In Progress	24/04/2020
5500901	24/04/2020	Repair to entrance wall brickwork.	Building Company 103 Building Company 103	Job In Progress	24/04/2020

Clients will be able to click on any job in this grid for additional information.

DEVELOPMENT TAB

This tab enables you to share additional information on the client's development.

This tab is organised into four separate areas which will display information you have already entered into the Development tab in CPL.

Development Info
Insurance
Approved Contractors
Contacts

DEVELOPMENT INFO

This is the same information shared on the right of each screen in the Client Web Portal.

INSURANCE

You have the ability to share all insurance policy details for a Development.

Insurance						
Policy No	Policy Code	Company	Renewal Date	Insurance Type	Total Valuation	Valuation Date
556781	FI663992	Foxgrove Insurance	01/11/2024 00:00:00	Normal	1000000	26/02/2024 13:40:45

APPROVED CONTRACTORS

You can let your clients know which companies have been set as approved contractors working on the Development.



Approved Contractors				
Job Type	Contractor	Contractor Code	Email Address	Phone No
Tree Surgeon	Trusted Tree Surgeons and Gardening	0001	KAM@treesurgeons.com	0766555324
Decorators	Professional Painting and Decorating	0004	PPD@PPD.co.uk	
Builder	Strath Building Services	0006	sytathbuilding@strathbuilding.com	

DEVELOPMENT CONTACTS

This could be a concierge/ janitor or other relevant development contacts to enable you to keep your clients better informed.

Contacts				
Name	Contact Type	Email Address	Phone No	Address
	CHAIRMAN			
Concierge Service	CON	conciergeservicecontact@conciergeservices.co.uk	01224 555667	11 Gorman Street Aberdeen AB11 6TF

All of this information is pulled from the Contacts tab in the Development in CPL.

CREDIT CONTROL TAB

Status	No. Clients	Outstanding Balance	
▼ 3rd Reminder ⓘ	2	£77838.54	
Apartment Name	Name	Amount	
Tall Building Flat Lane Main City	Cira Blackx	£6743.52	
Tall Building Flat Lane Main City	Kevin O'Krill	£71095.02	
Total	2	£77838.54	

This allows you to share information on debt and the balance within your development. For example, if you have a **Distribution of Debt** agreement for your development or you've issued an NOPL you would be able to advertise the fact that clients are about to become liable for another client's debt. This information displayed here would be drawn from clients in the development who had been placed on specific credit control statuses and would be dependent upon settings on the specific credit control statuses which would govern how much information is displayed here in terms of whether it is only totals for each status or whether there would also be names of clients.

BUDGETS TAB

This tab will only be relevant if you operate with budgeted accounts for your clients.



This would enable your clients to follow how much is budgeted for the year and see additional information on charges as they come in ahead of running the Budget Reconciliation at the end of the budget term.

ADMINISTERING THE PORTAL ACCOUNTS

There are two main options you can use to enable your customers to register for your Client Web Portal.

1. We can pre-create your client accounts for your Web Portal. Each client would then log in using their account number which is provided on their invoice information and a URN which you would send out to them in a mail merged document.
2. There can be a button for your clients to register on your Client Web Portal itself and in this case you would have to authorise each registered account in the New Web User widget in the Custom Desktop in CPL.

Once registered, client accounts can be administered from the **Custom Desktop** tab on the **Web Users** widget.



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