



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS  
& BLOCK MANAGERS

# EMAIL PROPERTIES IN CPL

## TRAINING GUIDE

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## INTRODUCTION

CPL has basic Email Properties (also referred to as Email Types) included for your use.

By default, these will include the following:

- Budget Recon
- Budget Recon Extranet (Client Web Portal)
- Cancel Work Order
- Client Authorised
- Client Document
- Client Introductory Letter
- Client Notice
- Client Request Feedback
- Document
- Estimate Instruction
- Estimate Quote Accept
- Estimate Quote Document
- Estimate Quote Reject
- First Reminder
- Invoice
- Invoice Extranet (Client Web Portal)
- New News Item
- Next Job User
- Notice of Intended Action
- Payment Receipt
- PL Document
- PL Email Remit
- PTX Direct Debit Set Up
- PTX Direct Debit Set Up - Variable
- PTX Direct Debit Set Up with Elevated Payment
- RAMS Email
- Statement
- Two Facto Authentication PIN
- Web Proposed Works Vote Confirmation
- Web User Password Reset
- Work Order

In CPL, these email properties or types operate in a similar fashion to mail merge templates, in that they use keyword fields to insert information into a communication. When a client or contractor is set to receive communication by email, rather than a printed copy, then the appropriate email type will be used as a delivery vehicle with the communication as an attachment.

Once these email properties are set up, they can be used by multiple modules within CPL to create emails which act as templates for these different areas.

For example, the Client Document email property will be used (when a client has chosen to receive their communication by email) as the email body and the document you are sending will be attached to this email. The Work Order related email types will be used to deliver the specific work order for an individual job with this being attached to the email.

Unlike mail merges, there is no table-by-table representation of these keywords for you to select from, and they have to be entered manually into the specific email properties themselves.

This training guide can be used for information on how you can amend the existing email properties to make these appropriate for your company communications. It will also cover where each keyword field can be used and the specific email types they can be inserted into.

In the appendix for this guide, you will find a series of tables covering various areas within CPL. Each table will list the email types on the left and the keyword fields on the right which can be used in those types.

*Please note, that you will only be able to amend existing email types. If you need additional types created, for example, against different offices, then please get in touch with CPL Support and this can be arranged.*

## AMENDING AN EMAIL TYPE

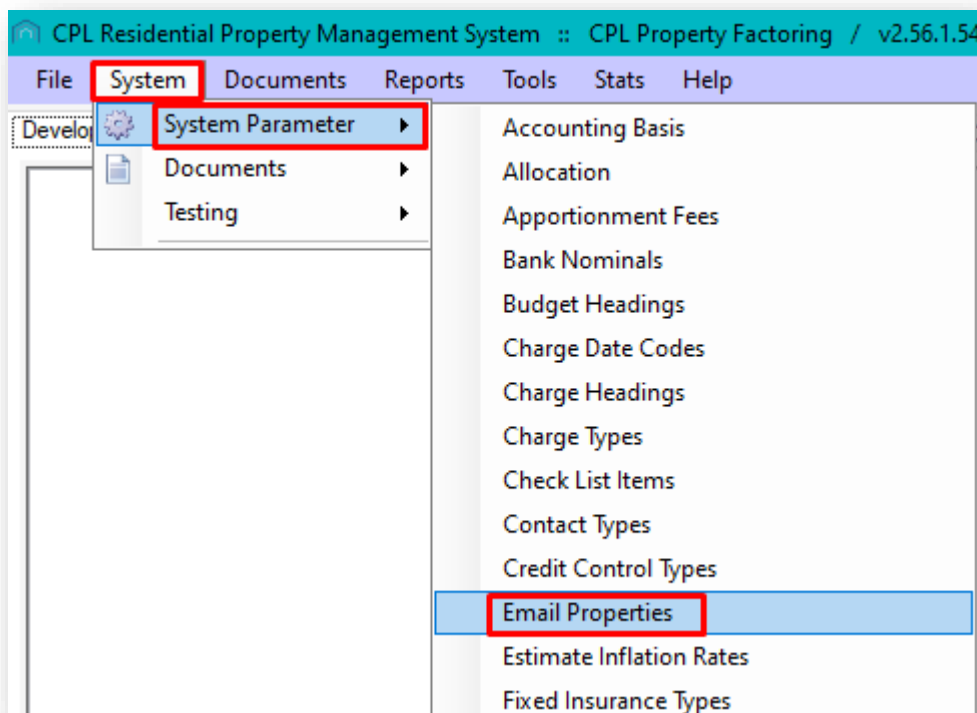
The section below will cover how to amend the email types for your company purposes.

### LOCATING THE EMAIL PROPERTIES IN CPL

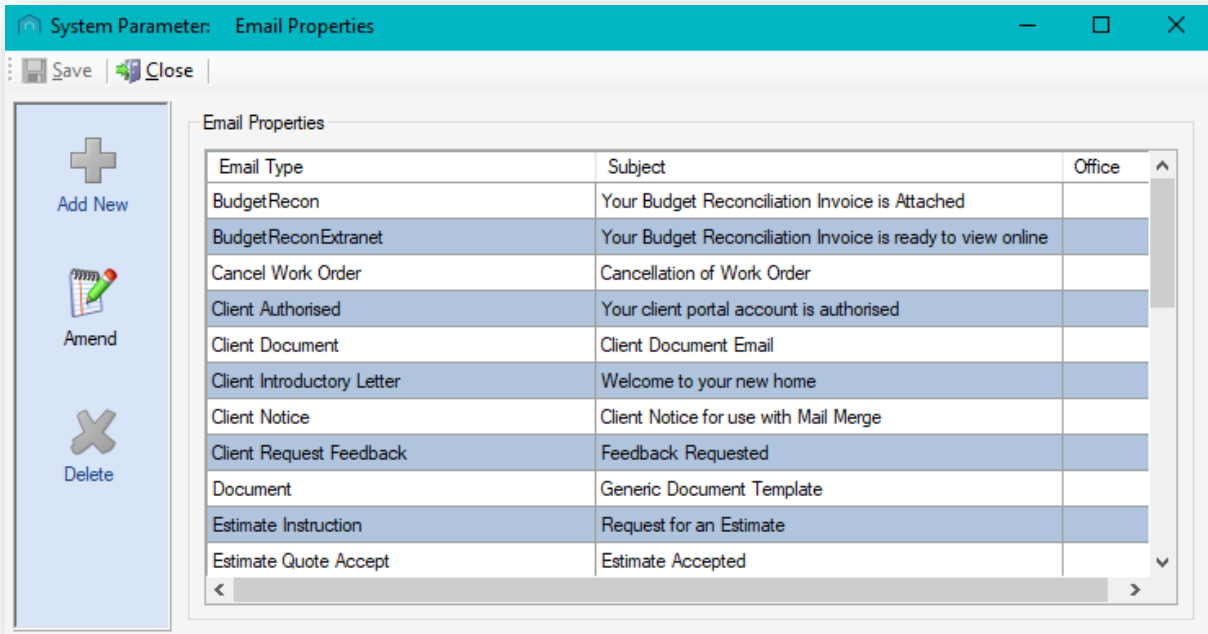
In order to allow you to edit these email types, you will need to locate them in CPL. This will depend on you having the appropriate permissions to do this.

From the main screen of CPL click to select **System**.

On the drop-down menu which appears select **System Parameter** and then on the resulting drop-down menu scroll down and select **Email Properties**.



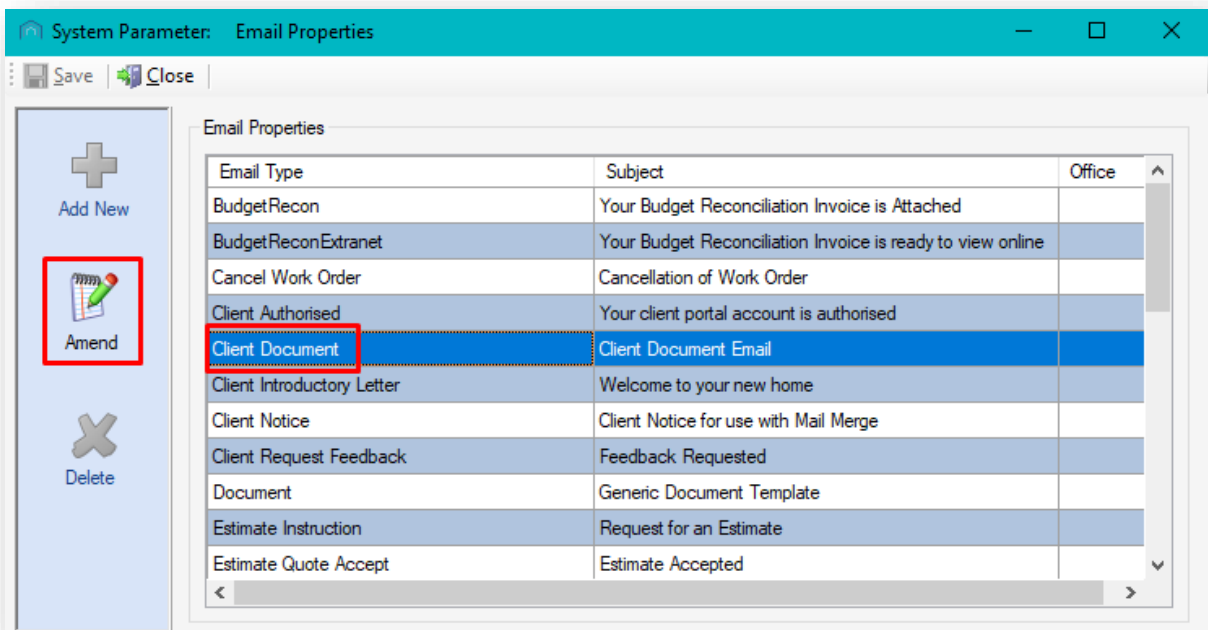
This will open the **System Parameter: Email Properties** window. Here you will see a list of available email types along with their subject heading. You are able to amend any of these. This will allow you to set them more specifically for your company purposes.



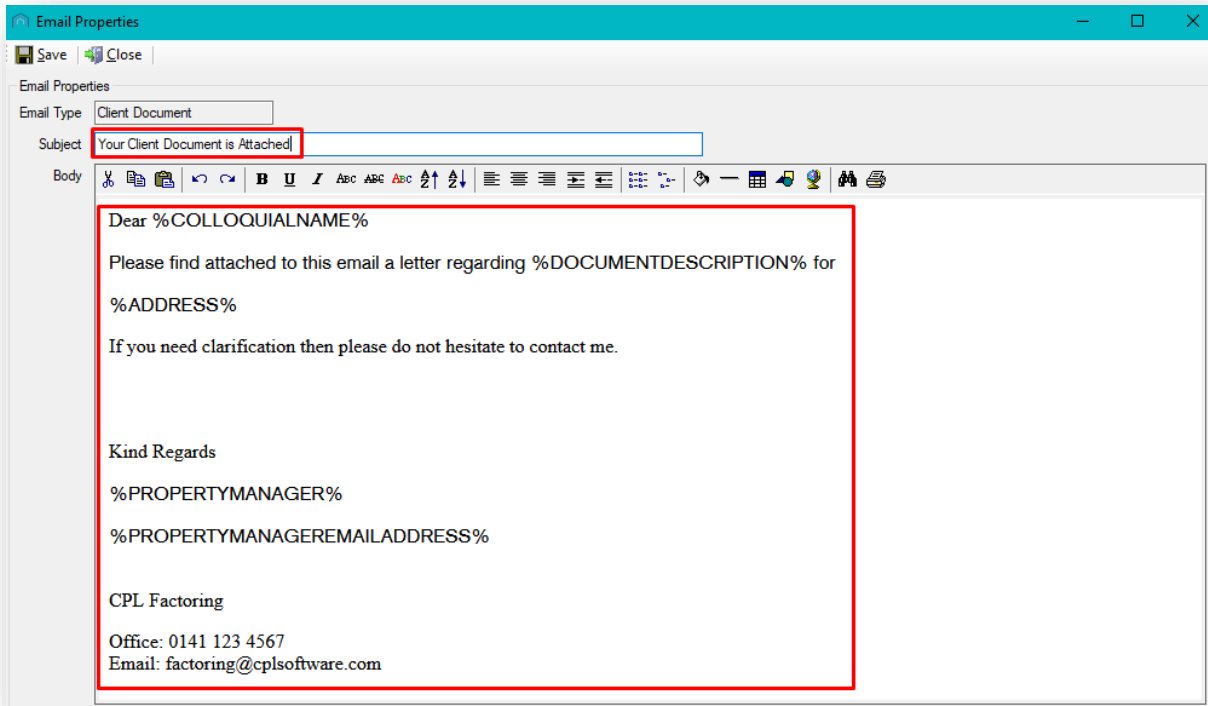
### OPENING THE EMAIL PROPERTY

Select the **Email Type** in the grid you wish to change by clicking to highlight it.

Once you have highlighted this, click the **Amend** button in the action panel on the left. You can also choose to double-click on the email type itself.



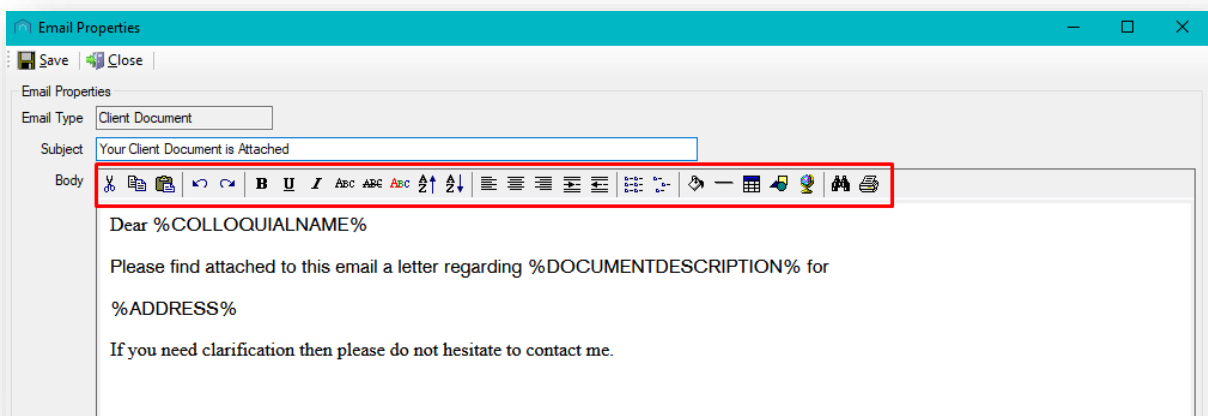
Either of these methods will open the **Email Properties** window for this specific email type.



## EDITING THE EMAIL TYPE

You can edit both the **Subject** line and the email **Body** for this type.

You will also notice a toolbar across the top of the email body with various options for formatting your email type. This includes changing the background colour and inserting a table or an image.



Email types will normally be comprised of a combination of body text and keyword fields. These keyword fields will enable CPL to look up and insert specific information available in the system. This is the same process as you would use in a document with mail merge fields. For example, your email type will allow you to be generic about the information you want to give to all clients in a development but also to use their individual names and individual account numbers on the emails going out to each specific client.

The tables of information which are listed later in the appendix of this training guide will give you help with which keyword field is appropriate to be used in each individual type.

When using the keyword fields to amend your types, it is important to remember that the keywords themselves are case-sensitive and should always be typed in capital letters. They should also always be prefixed and suffixed with a % and in an uppercase format, for example **%CLIENTNAME%**.

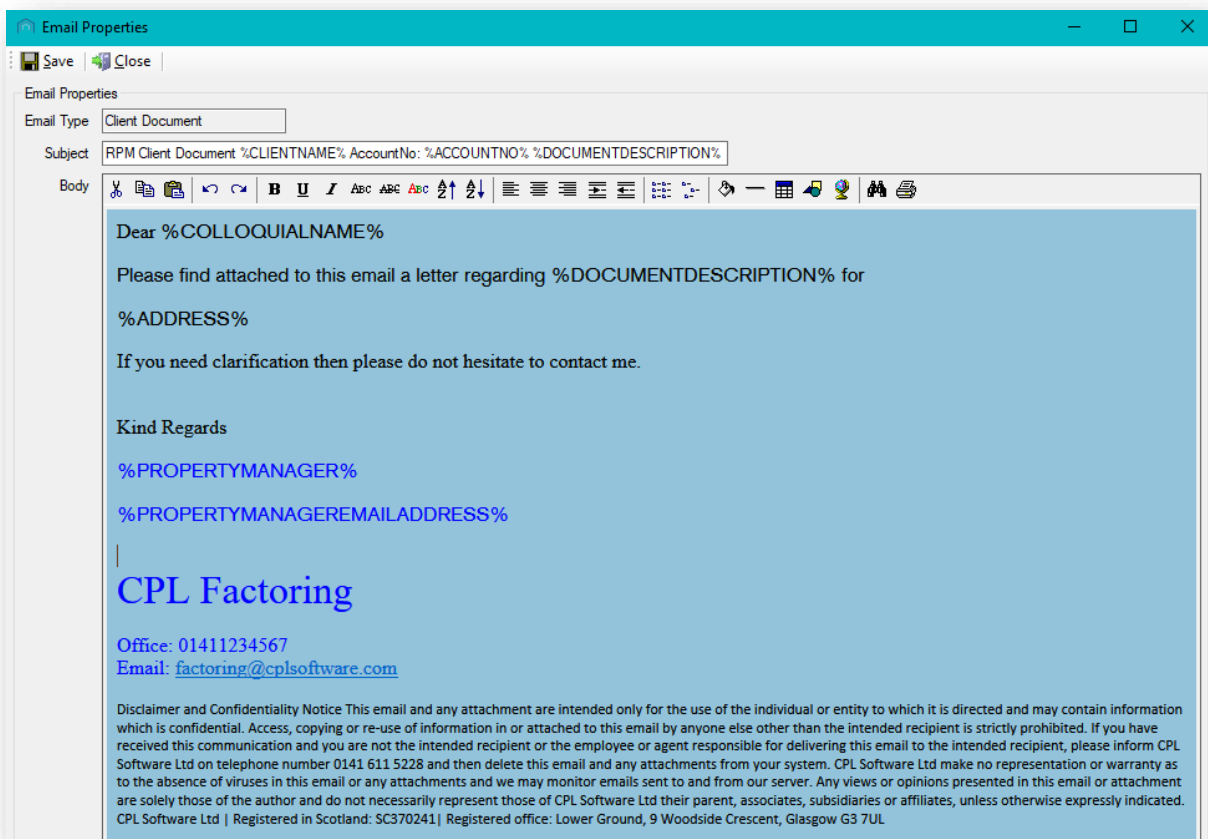
It is important to note that these keyword fields will also work if they are used in the subject field of an email type.

You will also notice that each keyword field uses a name which already describes the information it will be inserting into your email type. This will help you to decide which keyword fields you would like to use.

In the example above, we are amending a **Client Document** email type. By consulting the tables later in this guide you will notice that the type, Client Document is listed under the Client Keyword Types table. This means we can use any of the client keyword fields within the body of this type or its subject line.

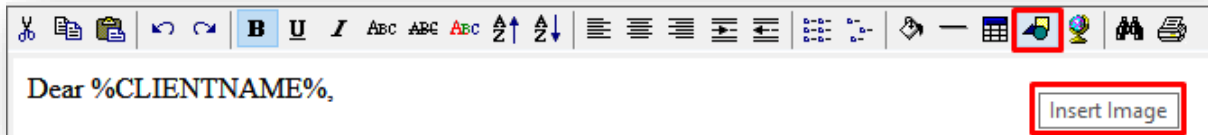
By typing, or copying and pasting these keyword fields into the body of the type we are telling CPL to look up and insert this specific information.

You can also edit how the email reads in general by customising this for your purposes. If you wish to, delete all text used in the type and start from scratch with your own. Insert any keyword fields as and when you see fit.



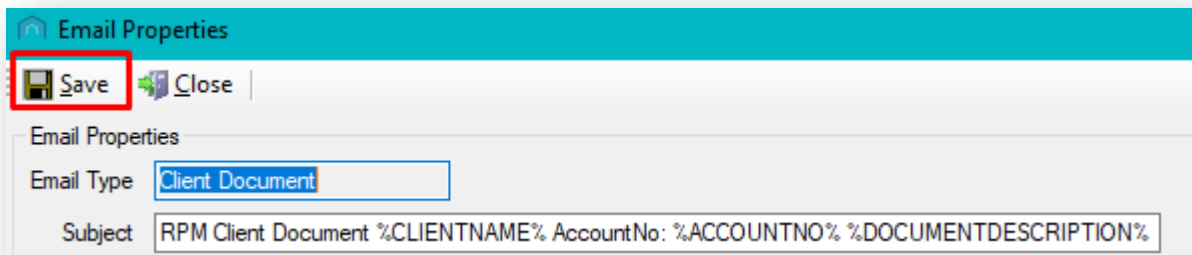
You can also use the text editor options to change the colour of your text and insert any appropriate images for your purpose.

To insert an image, click to place your cursor in the appropriate position in the type and then click on the shapes icon in the editor bar and you will then be able to browse for and upload your image to be used in the email type.



### SAVING YOUR EMAIL TYPE

Once you have made your changes click the **Save** option at the top of the window to save your changes.



Whenever the system sends an email from CPL with a client document or letter, the system will use this email type as the body of the email. Other documents that you are choosing to email out to your clients will be attached to the emails the system creates using these types. These will include any mail merge documents the system is distributing and your client notices.

You do not need to set up the email types as fully-fledged documents in their own right; they are simply cover letters or containers for your documents to be attached to.





## APPENDIX

### LISTS OF KEYWORD FIELDS FOR EACH EMAIL TYPE

Below you will find the tables containing the Email Types on the left and the list of keyword fields which are appropriate to be used for each of these on the right.

#### CLIENT EMAIL TYPES AND KEYWORD FIELDS

Client		
Email Types	Keyword Fields	
<ul style="list-style-type: none"> <li>Budget Recon</li> <li>Budget Recon Extranet (Client Portal)</li> <li>Client Document</li> <li>Client Introductory Letter</li> <li>Client Notices</li> <li>First Reminder</li> <li>Notice of Intended Action</li> <li>Client Request Feedback</li> <li>Invoice</li> <li>Invoice Extranet (Client Portal)</li> <li>Statement</li> <li>Payment Receipt</li> </ul>	%CLIENTID% %ACCOUNTNO% %CLIENTNAME% %COLLOQUIALNAME% %DOCUMENTDESCRIPTION% %ADDRESS% %POSTCODE% %DEVELOPMENTID% %PROPERTYID% %ENTRYDATE% %EXITDATE% %GARAGESPACENO% %INSURANCEDATEADVISEMENT% %CLIENTPAYMENTTYPECODE% %OWNERSELLINGGRACEPERIOD% %CREATED% %UPDATED% %CREATEDBY% %UPDATEDBY% %CREDITCONTROLSTATUS% %INTROPACKSENT%	%ISDELETED% %FLOATREPAYMENT% %FLOATREPAID% %APPCHARGE% %CLIENTTYPE% %NOTEINTEREST% %LASTINVOICEDATE% %CREDITCONTROLSTATUSDATE% %FINALNOTICEDATE% %NOTICEIADAMOUNT% %DEBTRECOVERY% %DEBYRECOVERYAMOUNT% %DRDAMOUNT% %HANDOVERDELETED% %LASTBUDGETINVOICEDATE% %EXCLUDEFROMFEES% %ALTERNATIVEACCOUNTNO% %PROPERTYADDRESS% %PROPERTYPOSTCODE% %PROPERTYMANAGER% %PROPERTYMANAGEREMAILADDRESS% %URN%

#### DOCUMENT EMAIL TYPE

This is the generic email type which will be used when you are sending out a document from various areas within CPL. For example, if you choose to resend correspondence from the Client Documents tab then it would use this template, rather than the Client Document Template.

Document	
Email Templates/Types	Keyword Fields
<ul style="list-style-type: none"> <li>Document</li> </ul>	<i>This template does <b>not</b> make use of any keyword fields.</i>



### ESTIMATES EMAIL TYPES AND KEYWORD FIELDS

These email types will be used when you are communicating with contractors about estimates.

Estimates		
Email Types	Keyword Fields	
<ul style="list-style-type: none"> <li>Estimate Instruction</li> <li>Estimate Quote Accept</li> <li>Estimate Quote Document</li> <li>Estimate Quote Reject</li> </ul>	%CLIENTCONTACTNOTES% %CLIENTCONTACTTELEPHONE% %CLIENTCONTACTEMAIL% %CLIENTCONTACTNAME% %CONTRACTORADDRESS% %DEVELOPMENTADDRESS% %JOBTYPE% %QUOTEREFNO%	%ESTIMATEREFNO% %EXPIRYDATE% %ORDERDATE% %ESTIMATEDDESCRIPTION% %PROPERTYMANAGEREMAILADDRESS% %PROPERTYMANAGER% %CONTRACTORNAME% %DEVELOPMENTNAME%

### WORK ORDER EMAIL TYPES AND KEYWORD FIELDS

These email types will be used when you are communicating with contractors about jobs.

Work Order		
Email Types	Keyword Fields	
<ul style="list-style-type: none"> <li>Cancel Work Order</li> <li>RAMS Email</li> <li>Work Order</li> </ul>	%PROPERTYMANAGERDDINUMBER% %CANCELLATIONREASON% %PROPERTYMANAGERDDINUMBER% %COLLOQUIALNAME% %JOBID% %JOBSEQID% %CLIENTADDRESS% %PROPERTYADDRESS% %PROPERTYPOSTCODE% %PROPERTYLISTEDDESCRIPTION% %DESCRIPTION% %ASBESTOSDESCRIPTION% %AGENTCONTACTDETAILS% %CLIENTCONTACTDETAILS% %COMPANYCONTACTDETAILS% %COMPANYNAME% %DEVELOPMENT% %BLOCK% %JOBDATETIME% %JOBDUEDATETIME% %ORDERID% %OFFICE%	%OFFICETELE% %USERNAME% %USEREMAIL% %CURRENTUSEREMAIL% %PRIORITY% %AGENTTYPE% %CLIENTEMAIL% %CLIENTTEL% %CLIENTNAME% %CLIENTACCOUNTNO% %CLIENTPOSTCODE% %ACCOUNTHOLDERNAME% %PLACCOUNTNO% %AGENTFAX% %AGENTTEL% %AGENTADDRESS% %PROPERTYMANAGER% %PROPERTYMANAGEREMAILADDRESS% %ESTIMATEDCOST% %CONFIRMEDBYUSERDISPLAYNAME% %CONFIRMTYPE%



### PURCHASE LEDGER EMAIL TYPES AND KEYWORD FIELDS

This is the email type which will be used to distribute documents to a Purchase Ledger Account when you send them out from the PL Account Documents tab.

Purchase Ledger		
Email Types	Keyword Fields	
<ul style="list-style-type: none"> <li>PL Document</li> </ul>	%DOCUMENTDESCRIPTION% %DATEBANKINFORECEIVED% %DATETERMSANDCONDITIONSDOCSRECEIVED% %DATEBANKINFOREQUESTED% %DATETERMSANDCONDITIONSDOCSSENT% %SUBCONTRACTS% %CONTRACTOR% %PAYMENTPOSTCODE% %POSTCODE% %STATUS% %CONTACTNAME%	%BANKACCOUNTNAME% %BANKNAME% %INSURANCEEXPIRYDATE% %EMAILORDERS% %GRACEDAYS% %PAYMENTTYPE% %PAYMENTADDRESS% %ADDRESS% %COLLOQUIALNAME% %ACCOUNTHOLDERNAME% %PLACCOUNTNO%

### REMITTANCE EMAIL TYPES AND KEYWORD FIELDS

This is the email type which will be used when you are sending out a Remittance to your contractors as part of the PL Payments process.

Remittance	
Email Types	Keyword Fields
<ul style="list-style-type: none"> <li>PL Email Remit</li> </ul>	%AMOUNT% %PLPAYDBN% %CONTRACTORNAME% %EMAIL% %DATEOFPAYMENT% %TRANSACTIONDESC% %PAIDBY%



### NEXT JOB USER EMAIL TYPE AND KEYWORD FIELDS

This is the email type that will be used to inform another CPL user that you are assigning a job to them to progress onto the next stage.

Next Job User		
Email Types	Keyword Fields	
<ul style="list-style-type: none"> <li>Next Job User</li> </ul>	%STAGENO% %JOBCONFIRMTYPEID% %JOBCOMPLETED% %ORDERCOMPLETED% %ARRIVALDATETIME% %COMPLETEDDATETIME% %PLACCOUNTCOMMENTS% %ESTIMATEREQUIRED% %GCOMPLETEDUSER% %GCREATEDUSERTASK% %CREATEDDATETASK% %GUPDATEDUSERTASK% %UPDATEDDATETASK% %TARGETAMOUNT% %WORKORDERSENT% %WORKORDERSENTTYPEID% %BUDGETHEADINGID% %RAMSRECEIVED% %RAMSREQUESTED% %OPENED% %JOBDATETIME% %ACTIONED% %DESCRIPTION% %CREATEDDATETRANSACTION% %UPDATEDDATETRANSACTION% %RAMS% %JOBDUEDATETIME% %DEVELOPMENT%	%BLOCK% %CLIENT% %INSURANCECLAIM% %CREATEDJOBUSER% %UPDATEDJOBUSER% %ESTIMATEREQUEST% %JOBNUMBERTYPE% %CYCLICALMAINTENANCETASK% %DEVELOPMENTAREACODE% %CYCLICALMAINTENANCEAPPORTION% %WARRANTYDATE% %ALLOCATEDUSER% %JOBCONFIRMATIONTYPE% %JOBSTATUS% %PRIORITY% %PROPERTYMANAGER% %PLACCOUNT% %COMPLETEDUSER% %CREATEDTASKUSER% %UPDATEDTASKUSER% %WORKORDERSENTBY% %BUDGETHEADING% %APPORTION% %NEXTUSER% %CREATEDTRANSACTIONUSER% %UPDATEDTRANSACTIONUSER% %SELF% %CHANGED%



### WEB USER EMAIL TYPES AND KEYWORD FIELDS

Web User		
Email Types	Keyword Fields	
<ul style="list-style-type: none"> <li>Web Proposed Works Vote Confirmation</li> <li>Client Authorised</li> <li>Web User Password Reset</li> <li>Two Factor Authentication PIN</li> </ul>	%WEBUSERNAME% %EMAILADDRESS% %ACCOUNTSTATE% %ACCEPTEDTERMSANDCONDITIONS% %ACCEPTEDTERMSANDCONDITIONSDATE%	%SURNAME% %TELEPHONENUMBER% %LINKEDCLIENTACCOUNTNUMBERS% %FIRSTVALIDCLIENTNAME% %FIRSTVALIDCLIENTACCOUNTNUMBER%

### CLIENT WEB PORTAL DIRECT DEBIT PAYMENT DETAILS EMAIL TYPES AND KEYWORD FIELDS

These are the email types which will be used when you are sending out confirmation to a client who has set up a Direct Debit through the Client Web Portal.

Client Direct Debit Payment Details		
Email Templates/Types	Keyword Fields	
<ul style="list-style-type: none"> <li>PTX Direct Debit Set Up</li> <li>PTX Direct Debit Set Up – Variable</li> <li>PTX Direct Debit Set Up with Elevated Payment</li> </ul>	%CLIENTID% %ACCOUNTNO% %CLIENTNAME% %COLLOQUIALNAME% %DESCRIPTION% %ADDRESS% %POSTCODE% %DEVELOPMENTID% %PROPERTYID% %ENTRYDATE% %EXITDATE% %GARAGESPACENO% %INSURANCEDATEADVISEMENT% %CLIENTPAYMENTTYPECODE% %OWNERSSELLINGGRACEPERIOD% %CREATED% %UPDATED% %HANDOVERDELETED% %LASTBUDGETINVOICEDATE% %EXCLUDEFROMFEES% %ALTERNATIVEACCOUNTNO% %PROPERTYADDRESS%	%CREATEDBY% %UPDATEDBY% %CREDITCONTROLSTATUS% %INTROPACKSENT% %ISDELETED% %FLOATREPAYMENT% %FLOATREPAID% %APPCHARGE% %CLIENTTYPE% %NOTEINTEREST% %LASTINVOICEDATE% %CREDITCONTROLSTATUSDATE% %FINALNOTICEDATE% %NOTICEIADAMOUNT% %DEBTRECOVERY% %DEBYRECOVERYAMOUNT% %DRDAMOUNT% %PROPERTYPOSTCODE% %PROPERTYMANAGER% %PROPERTYMANAGEREMAILADDRESS% %URN%



### DEVELOPMENT NEWS EMAIL TYPES AND KEYWORD FIELDS

This is the email template which will be used when you are informing your clients that there is a new News Item for them to view online in the Client Portal.

Development News		
Email Types	Keyword Fields	
<ul style="list-style-type: none"><li>New News Item</li></ul>	%CLIENTID% %CLIENTACCNO% %CLIENTNAME% %COLLOQUIALNAME% %CLIENTEMAILADDRESS%	%DEVNAME% %PROPERTYADDRESS% %NEWSTITLE% %NEWSBODY%

### 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](mailto:support@cplsoftware.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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