



HELPSHEET 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.

If you would like support with editing the Email Types, please refer to the Email Properties in CPL Training Guide which is available on the CPL Knowledge Base.

CLIENT EMAIL TYPES AND KEYWORD FIELDS

Client		
Email Types	Keyword Fields	
<ul style="list-style-type: none"> Budget Recon Budget Recon Extranet (Client Portal) Client Document Client Introductory Letter Client Notices First Reminder Notice of Intended Action Client Request Feedback Invoice Invoice Extranet (Client Portal) Statement Payment Receipt 	%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"> Document 	<i>This template does not 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"> Estimate Instruction Estimate Quote Accept Estimate Quote Document Estimate Quote Reject 	%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"> Cancel Work Order RAMS Email Work Order 	%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"> PL Document 	%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"> PL Email Remit 	%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"> Next Job User 	%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"> Web Proposed Works Vote Confirmation Client Authorised Web User Password Reset Two Factor Authentication PIN 	%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"> PTX Direct Debit Set Up PTX Direct Debit Set Up – Variable PTX Direct Debit Set Up with Elevated Payment 	%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"> New News Item 	%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 or through our portal at <https://contact.cplsoftware.com/portal/home> or calling us on 0345 646 0240 (option 1).



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS