



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS  
& BLOCK MANAGERS

# PLANNED MAINTENANCE

## TRAINING GUIDE

JULY 2023

Version 1.0



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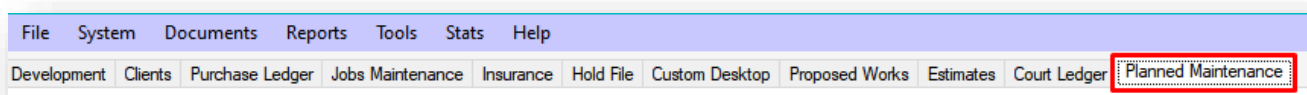
## INTRODUCTION

We have created a new feature called Planned Maintenance to make it easier for you to schedule, keep track of and process recurring jobs without having to recreate these jobs every time. You may wish to use the Planned Maintenance module for regular jobs which get repeated such as gutter cleaning, external painter works, lift maintenance or mechanical and electrical maintenance. Once created a Planned Maintenance record, when processed, will process the job all the way through, creating the work order, setting this to a Job in Progress status and if there's an email present in the PL Account it will also send off the work order to the contractor.

Planned Maintenance has its own main tab in CPL which will allow you to create planned maintenance records. These will contain all the detail the system needs to generate the work orders for each individual job, including the description, the frequency, the PL account, and any internal comments you wish to record. The record can also include any documents you would like to be attached with the Work Order when this is generated in each cycle of the planned maintenance record.

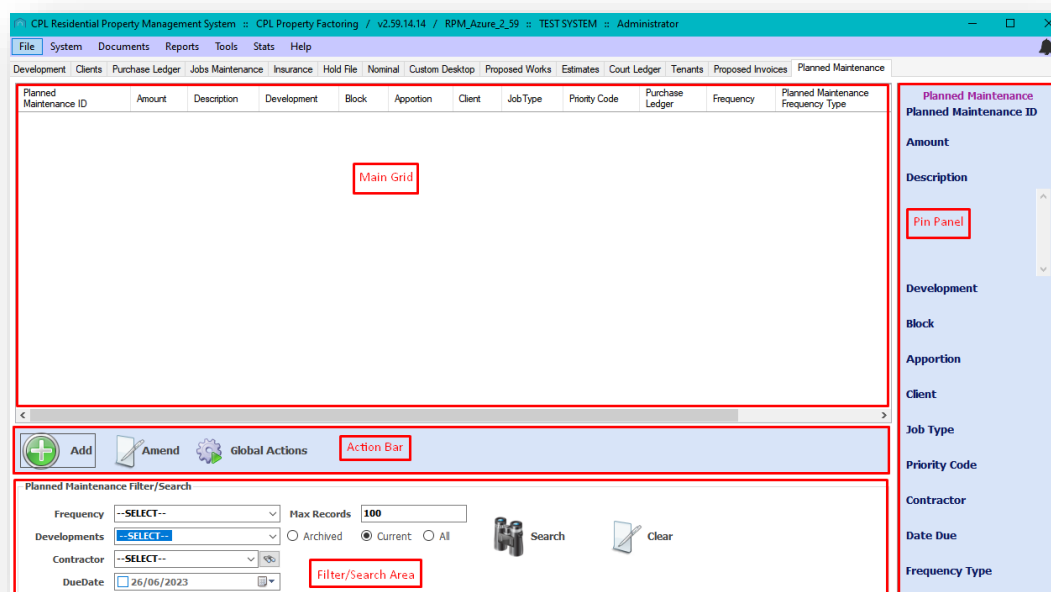
## PLANNED MAINTENANCE PERMISSIONS

To be able to access the Planned Maintenance module once we have configured your database for access, you will need a Superuser within your company to set users up with the correct permissions. Once this is done each user will see the Planned Maintenance tab.



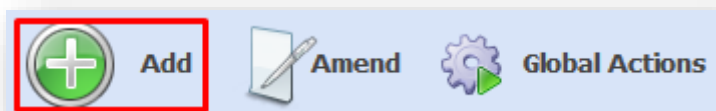
## THE PLANNED MAINTENANCE TAB

Like other tabs in CPL, the Planned Maintenance tab is made up of a grid, a filter/ search area, a pin panel and an action panel across the middle of the screen.



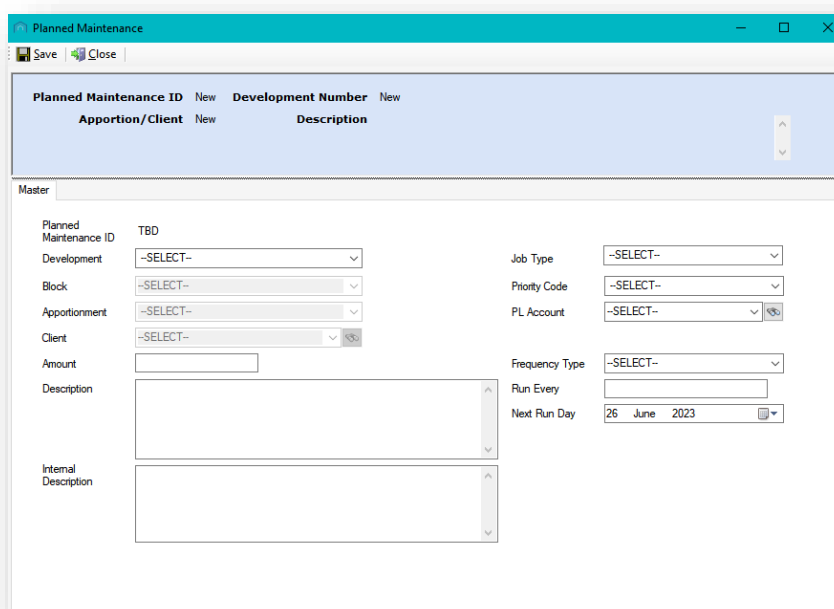
## CREATING A PLANNED MAINTENANCE RECORD

To create a Planned Maintenance record, click on the **Add** option in the action bar on the Planned Maintenance tab.

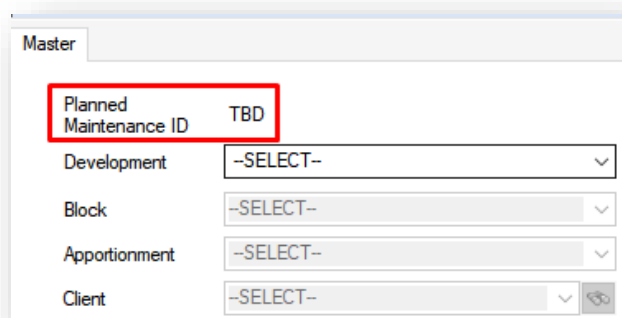


*You will also find information below about creating a planned maintenance record from the Planned Maintenance tab within a development.*

This will launch the **Planned Maintenance** screen.

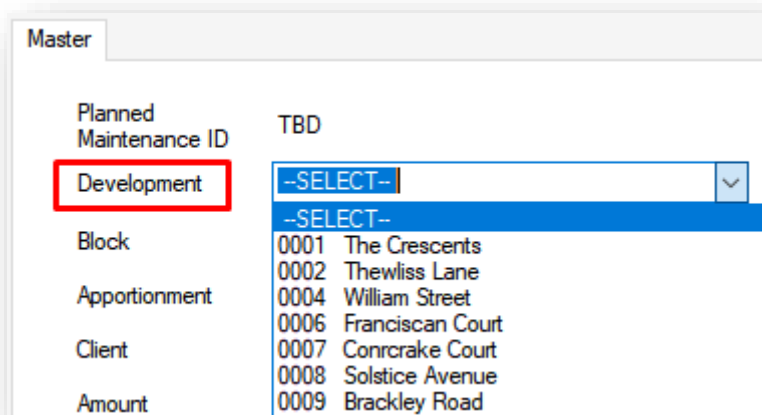


The Planned Maintenance ID field will be populated with the next available ID once you have saved your planned maintenance task.



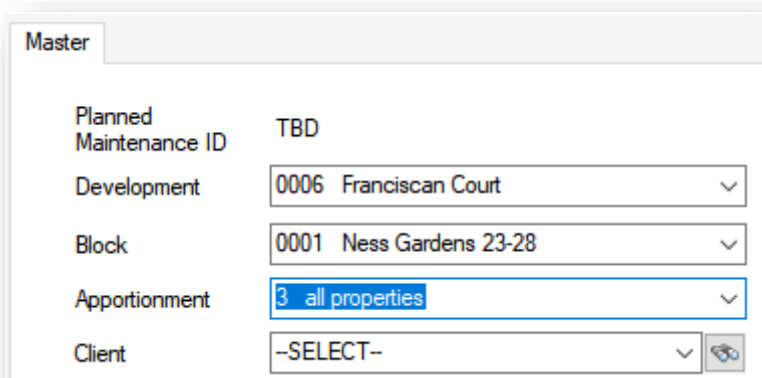
All selections you make and information you enter in the following fields will transfer through to the job each time this is created.

Click on the arrow to select the relevant Development from the drop-down menu.



Master	
Planned Maintenance ID	TBD
Development	-SELECT-
Block	0001 The Crescents
Apportionment	0002 Thewliss Lane
Client	0004 William Street
Amount	0006 Franciscan Court
	0007 Concrake Court
	0008 Solstice Avenue
	0009 Brackley Road

Once you have selected the **Development**, the fields for selecting a **Block**, **Apportionment** and **Client** will become available. You must select either an apportionment or an individual client.



Master	
Planned Maintenance ID	TBD
Development	0006 Franciscan Court
Block	0001 Ness Gardens 23-28
Apportionment	3 all properties
Client	-SELECT-

If you are selecting an individual client, selecting a block first will filter for only clients in the selected block.

You can enter an amount to go against the job when it is created.

Planned Maintenance ID	TBD
Development	0006 Franciscan Court
Block	0001 Ness Gardens 23-28
Apportionment	3 all properties
Client	--SELECT--
Amount	150.00

Enter the **Description** you would like to be included on the work order whenever the planned maintenance task is processed.

Master	
Planned Maintenance ID	TBD
Development	0006 Franciscan Court
Block	0001 Ness Gardens 23-28
Apportionment	3 all properties
Client	--SELECT--
Amount	150.00
Description	Please carry out gutter cleaning as agreed.

There is an option to enter an **Internal Description** into the field below if this would be useful. This will not transfer onto the work order.

Master

Planned Maintenance ID	TBD
Development	0006 Franciscan Court
Block	0001 Ness Gardens 23-28
Apportionment	3 all properties
Client	--SELECT--
Amount	150.00
Description	Please carry out gutter cleaning as agreed.
Internal Description	Contractor has agreed to carry out the work every 6 months or 150.00 charge each time.

In the column on the right of the Planned Maintenance screen, use the drop-down menus to select an appropriate **Job Type**, **Priority Code** and **PL Account** which will be used each time the job is actioned.

Master

Planned Maintenance ID	TBD	Job Type	GU Gutter Cleaner
Development	0006 Franciscan Court	Priority Code	Routine (4d, 3h)
Block	0001 Ness Gardens 23-28	PL Account	Building Company 103 Buildin
Apportionment	3 all properties		
Client	--SELECT--		

Beneath this, you can select a **Frequency Type** of **Weekly** or **Monthly** from the drop-down menu.

Job Type	GU Gutter Cleaner
Priority Code	Routine (4d, 3h)
PL Account	Building Company 103 Buildin
Frequency Type	-SELECT-
Run Every	-SELECT-
Next Run Day	Weekly
	Monthly

You can then enter a value into the **Run Every** field to modify your selected frequency type.

For example, in the scenario below, **Monthly** has been selected as the frequency type and the value of **6** entered in to the **Run Every** field which will mean the planned maintenance record will create a job every 6 months.

Job Type	GU Gutter Cleaner
Priority Code	Routine (4d, 3h)
PL Account	Building Company 103 Buildin
Frequency Type	Monthly
Run Every	6 Months
Next Run Day	26 June 2023

You can then use the calendar within the **Next Run Day** field to select the appropriate date when the planned maintenance record will first be run.

Frequency Type	Monthly
Run Every	6 Months
Next Run Day	19 July 2023

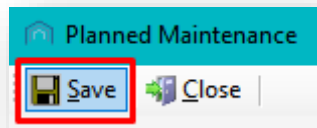
July 2023

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

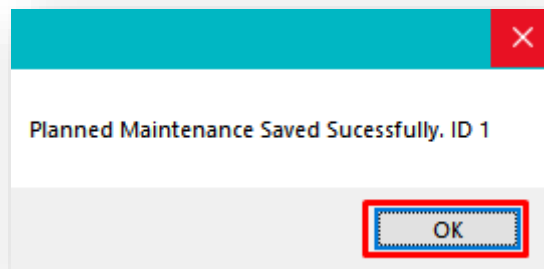
Today: 26/06/2023



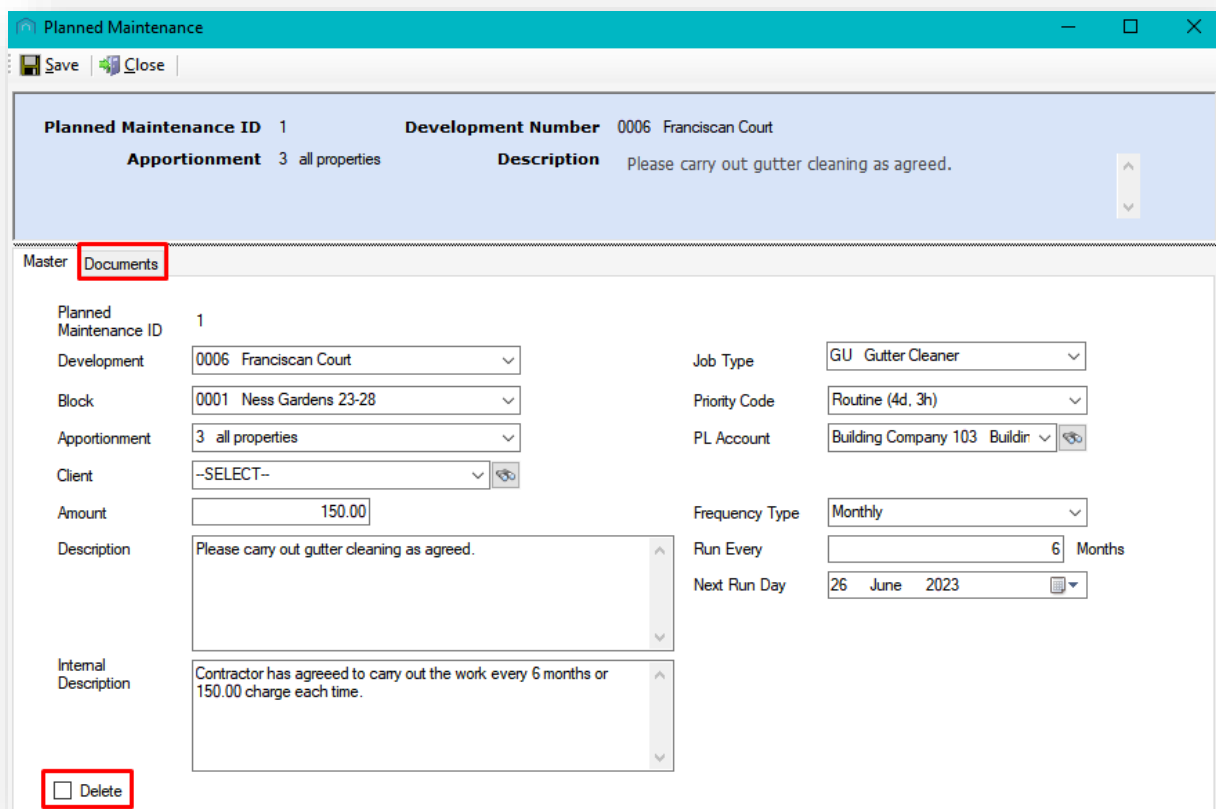
When you have entered all appropriate information, you can click on the **Save** option in the top-left corner of the Planned Maintenance screen to save your record.



The system will confirm that this has been saved successfully and you can click on **OK** to dismiss the confirmation message.



The Planned Maintenance screen will refresh with the updated information included in the pin panel at the top. The **Delete** tick box and the **Documents** tab will become visible for the record you have added.



**Planned Maintenance**

Save Close

**Planned Maintenance ID** 1      **Development Number** 0006 Franciscan Court  
**Apportionment** 3 all properties      **Description** Please carry out gutter cleaning as agreed.

Master **Documents**

Planned Maintenance ID 1

Development 0006 Franciscan Court

Block 0001 Ness Gardens 23-28

Apportionment 3 all properties

Client -SELECT-

Amount 150.00

Description Please carry out gutter cleaning as agreed.

Internal Description Contractor has agreed to carry out the work every 6 months or 150.00 charge each time.

Job Type GU Gutter Cleaner

Priority Code Routine (4d, 3h)

PL Account Building Company 103 Buildir

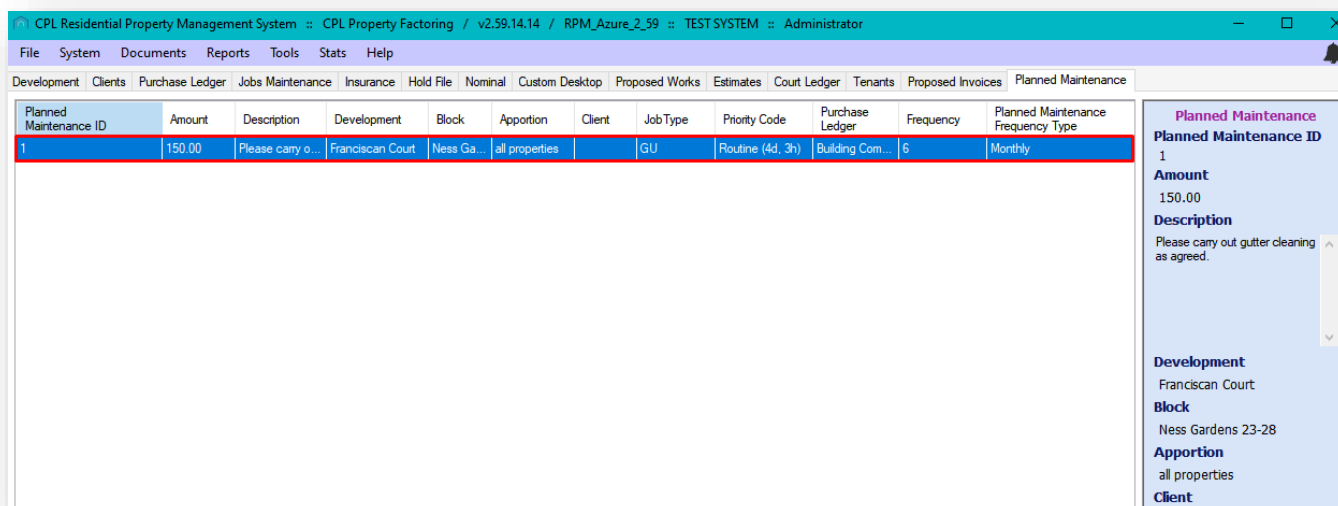
Frequency Type Monthly

Run Every 6 Months

Next Run Day 26 June 2023

☐ Delete

On closing the record screen, you will note that the Planned Maintenance record will now be listed in the grid in the Planned Maintenance tab.



Planned Maintenance ID	Amount	Description	Development	Block	Apportion	Client	Job Type	Priority Code	Purchase Ledger	Frequency	Planned Maintenance Frequency Type
1	150.00	Please carry o...	Franciscan Court	Ness Ga...	all properties		GU	Routine (4d, 3h)	Building Com...	6	Monthly

**Planned Maintenance**

**Planned Maintenance ID**  
1

**Amount**  
150.00

**Description**  
Please carry out gutter cleaning as agreed.

**Development**  
Franciscan Court

**Block**  
Ness Gardens 23-28

**Apportion**  
all properties

**Client**

## ADDING DOCUMENTS TO A PLANNED MAINTENANCE RECORD

When you have saved a Planned Maintenance record, you can click on the **Documents** tab and add documents that you would like to be sent to the contractor along with the work order.



**Planned Maintenance ID** 1      **Development Number** 0006 Franciscan Court


**Apportionment** 3 all properties      **Description** Please carry out gutter cleaning as agreed.

Master **Documents**

Description	Filepath

 Add

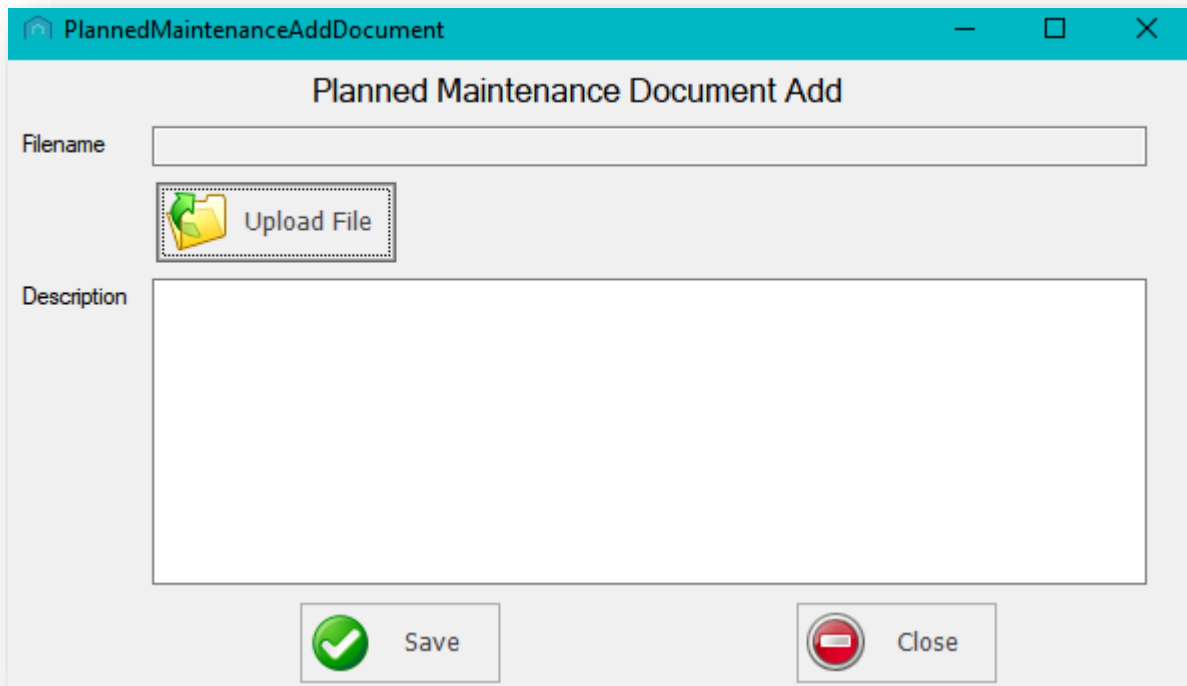
 Preview

 Delete

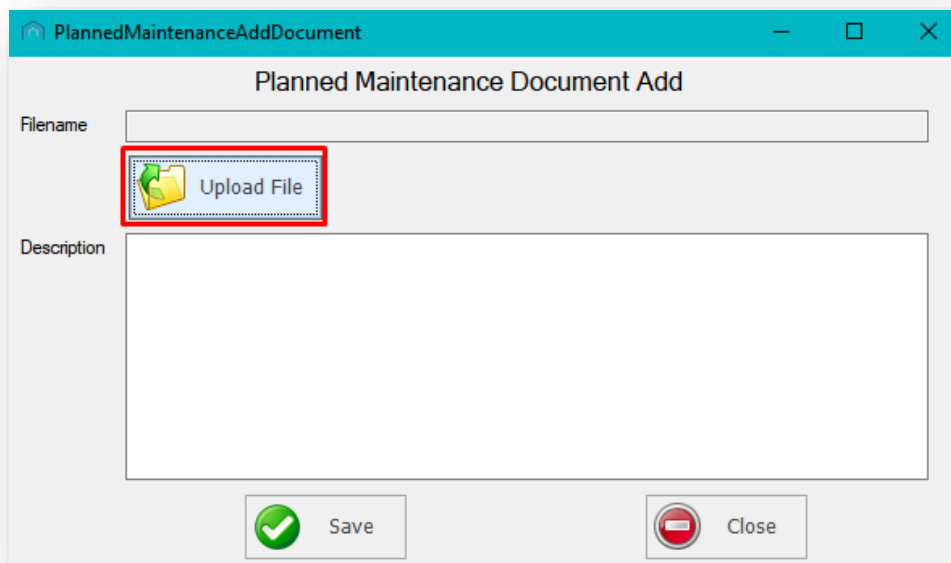
To add a document, click on the **Add** option in the action panel on the left of the Documents tab.



This will open the **Planned Maintenance Add Document** screen.

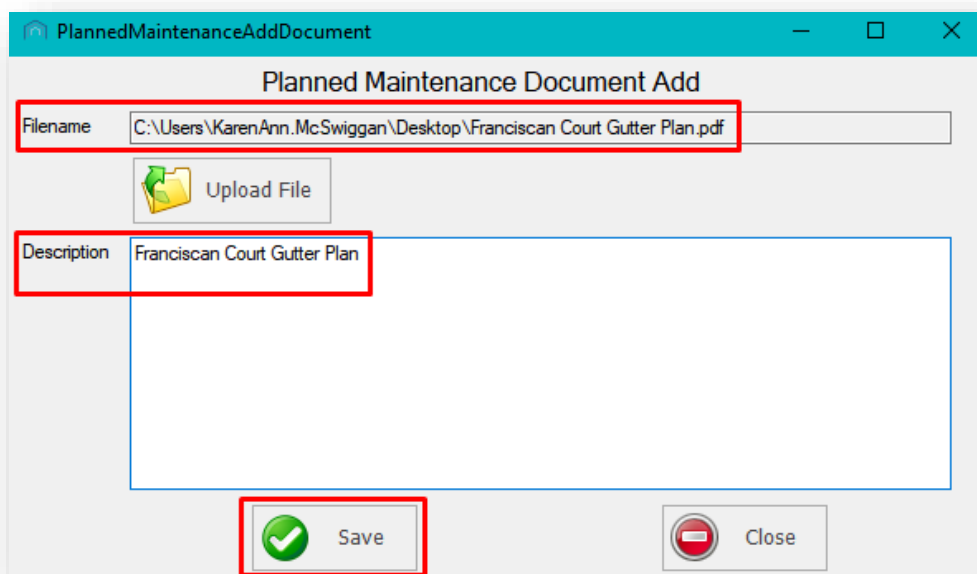


Click on the **Upload File** button to browse for any files you would like to select for upload.



Once you have selected your file, the file path will appear in the **Filename** field above.

Add an appropriate **Description** to accompany your document and then click on the **Save** button when you are ready.



Planned Maintenance Document Add

Filename: C:\Users\KarenAnn.McSwiggan\Desktop\Franciscan Court Gutter Plan.pdf

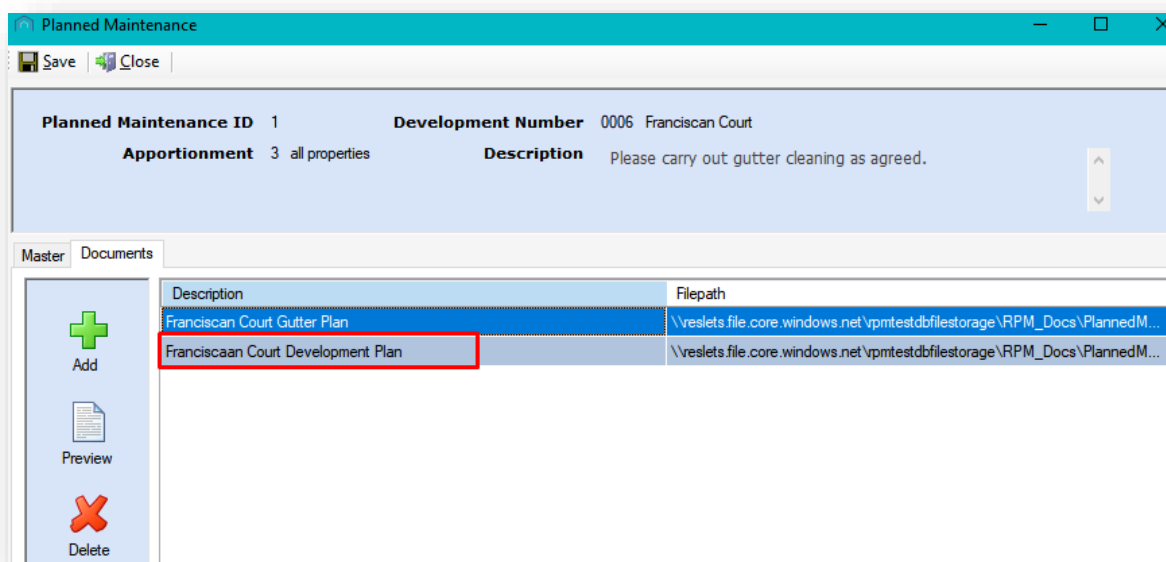
Upload File

Description: Franciscan Court Gutter Plan

Save Close

The Planned Maintenance Add Document screen will close and you will see your document listed in the grid in the Documents tab.

You can click the **Add** button again and repeat the process if you wish to add more than one document.



Planned Maintenance

Save Close

Planned Maintenance ID: 1 Development Number: 0006 Franciscan Court

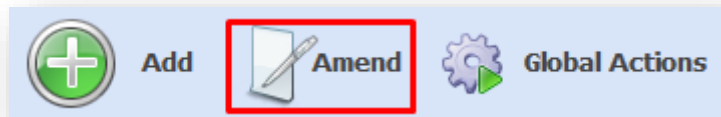
Apportionment: 3 all properties Description: Please carry out gutter cleaning as agreed.

Master Documents

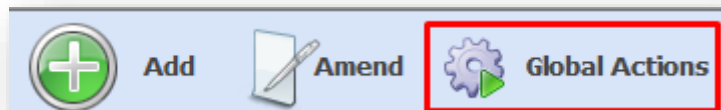
Description	Filepath
Franciscan Court Gutter Plan	\\veslets.file.core.windows.net\vpmttestdbfilestorage\RPM_Docs\PlannedM...
Franciscan Court Development Plan	\\veslets.file.core.windows.net\vpmttestdbfilestorage\RPM_Docs\PlannedM...

Add Preview Delete

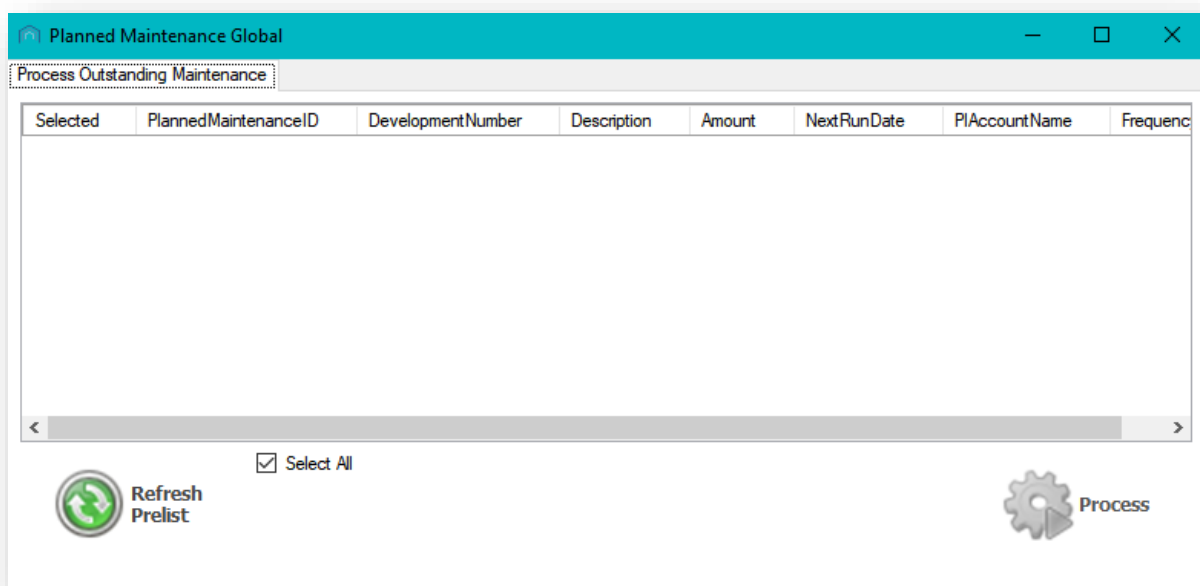
You can amend any Planned Maintenance record in the main screen by double-clicking on the record, or clicking to highlight it in the grid and clicking on the **Amend** option in the action bar. Additional information on this is located below.



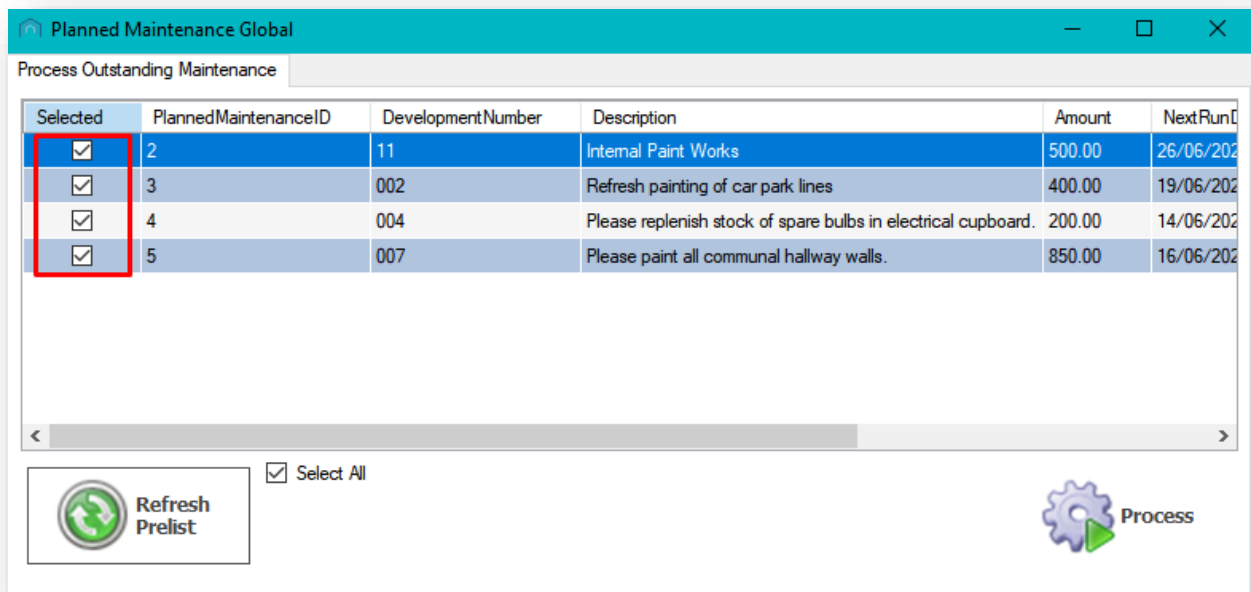
To process Planned Maintenance records and create the jobs, you can click on the **Global Actions** option in the action bar in the main Planned Maintenance tab.



This will open the **Planned Maintenance Global** screen on the **Process Outstanding Maintenance** tab.





Clicking on the **Refresh Prelist** button towards the bottom-left of the screen will load all planned maintenance records with a run date of today or earlier and display them on the grid.



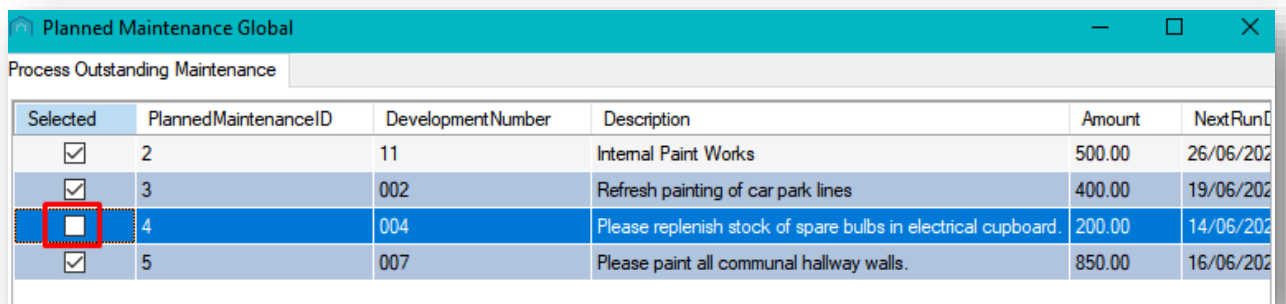
Planned Maintenance Global

Process Outstanding Maintenance

Selected	PlannedMaintenanceID	DevelopmentNumber	Description	Amount	NextRunD
<input checked="" type="checkbox"/>	2	11	Internal Paint Works	500.00	26/06/202
<input checked="" type="checkbox"/>	3	002	Refresh painting of car park lines	400.00	19/06/202
<input checked="" type="checkbox"/>	4	004	Please replenish stock of spare bulbs in electrical cupboard.	200.00	14/06/202
<input checked="" type="checkbox"/>	5	007	Please paint all communal hallway walls.	850.00	16/06/202

 Refresh Prelist ☒ Select All  Process

These will automatically be ticked as **Selected**. If you don't wish to process all of your planned maintenance tasks through to jobs then you can untick them in this screen to deselect them.



Planned Maintenance Global

Process Outstanding Maintenance



Selected	PlannedMaintenanceID	DevelopmentNumber	Description	Amount	NextRunD
<input checked="" type="checkbox"/>	2	11	Internal Paint Works	500.00	26/06/202
<input checked="" type="checkbox"/>	3	002	Refresh painting of car park lines	400.00	19/06/202
<input type="checkbox"/>	4	004	Please replenish stock of spare bulbs in electrical cupboard.	200.00	14/06/202
<input checked="" type="checkbox"/>	5	007	Please paint all communal hallway walls.	850.00	16/06/202

Clicking on the **Process** button to the right of this screen will process all selected planned maintenance tasks through to become jobs.

**Planned Maintenance Global**

Process Outstanding Maintenance

Selected	PlannedMaintenanceID	DevelopmentNumber	Description	Amount	NextRunDate
<input checked="" type="checkbox"/>	2	11	Internal Paint Works	500.00	26/06/2022
<input checked="" type="checkbox"/>	3	002	Refresh painting of car park lines	400.00	19/06/2022
<input checked="" type="checkbox"/>	4	004	Please replenish stock of spare bulbs in electrical cupboard.	200.00	14/06/2022
<input checked="" type="checkbox"/>	5	007	Please paint all communal hallway walls.	850.00	16/06/2022



 Refresh Prelist ☒ Select All  Process

The progress bar will display on the screen as the system is processing these jobs.

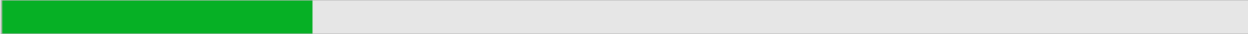
**Planned Maintenance Global**

Process Outstanding Maintenance

Selected	PlannedMaintenanceID	DevelopmentNumber	Description	Amount	NextRunDate
<input checked="" type="checkbox"/>	2	11	Internal Paint Works	500.00	26/06/2022
<input checked="" type="checkbox"/>	3	002	Refresh painting of car park lines	400.00	19/06/2022
<input checked="" type="checkbox"/>	4	004	Please replenish stock of spare bulbs in electrical cupboard.	200.00	14/06/2022
<input checked="" type="checkbox"/>	5	007	Please paint all communal hallway walls.	850.00	16/06/2022

 Refresh Prelist ☒ Select All  Process

Processing Planned Maintenance: 2



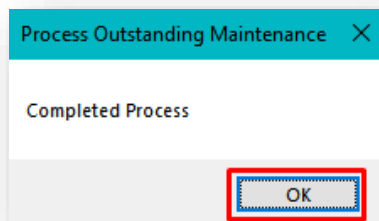
Sending the Work Order for Order: 5530001

Show Details

Jobs will be created with Stage 2 processed with a status of **Job in Progress (JIP)**. This means the work order for each job will be sent to the PL Account if there is an email address available. If there is no email address entered on the PL Account, the work order will open in a print preview window to enable it to be printed instead.

The Planned Maintenance record will be updated to the next appropriate run date, based on the frequency selected. For example, if the initial run date was 1<sup>st</sup> April and the frequency is set to run every 6 months, then the next run date will be updated to 1<sup>st</sup> October.

When all planned maintenance records have been processed, the system will present you with a confirmation window. You can click on **OK** to dismiss this.



You will note that all records will produce jobs which will be listed in both the main Jobs Maintenance tab and on the Jobs tab on each appropriate individual development.

File

System

Documents

Reports

Tools

Stats

Help

Development

Clients

Purchase Ledger

Jobs Maintenance

Insurance

Hold File

Nominal

Custom Desktop

Proposed Works

Estimates


Court Ledger

Tenants

Proposed Invoices

Planned M

Order	Completed Date	Job	Date/Time	Development	Priority	Job Type	PL Account	Status
5530301		55303	27/06/2023 13:40	0007 Concrake Court	Routine (4d, 3h)	Painter	Painting by Nums	JIP
5530201		55302	27/06/2023 13:40	0004 William Street	Routine (4d, 3h)	Electrical	Electrician 101	JIP
5530101		55301	27/06/2023 13:40	0002 Thewliss Lane	Routine (4d, 3h)	Painter	Painting by Nums	JIP
5530001		55300	27/06/2023 13:40	0011 Dev 11 Budgeted	Routine (4d, 3h)	Painter	Painting by Nums	JIP
5529901		55299	27/06/2023 11:12	0011 Dev 11 Budgeted	Routine (4d, 3h)	Painter	Painting by Nums	JIP
5529801		55298	26/06/2023 16:25	0006 Franciscan Court	Routine (4d, 3h)	Gutter Cl...	Building Company 103	JIP

Development 0006 Franciscan Court									
Total Properties 18									
Property Manager ka Total Blocks 7									
Client Charge Summaries Budgets Charge Installments Addresses Estimates Development News Sinking Fund Nominals Nominal Codes									
Master Blocks Properties Apportionments Diarised Charges Jobs Insurance Documents CheckList Keys Approved Contractors									
Job Information									
 Add	Job	Task	Order	Date/Time	Job Type	Status	Client		
	55298	1	5529801	26/06/2023 16:25	Gutter Cl...	JIP			
	55247	1		02/08/2022 10:28	All Trades	PSC			



## THE PLANNED MAINTENANCE TAB WITHIN A DEVELOPMENT

There is also a Planned Maintenance tab available in each development.

This will only display planned maintenance entries for the individual development.

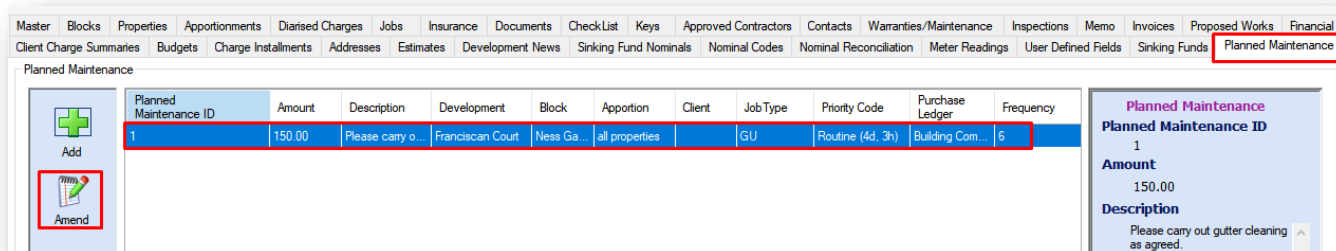
The **Add** button can be used to create a planned maintenance record straight from the development tab, where the individual development will be pre-selected.

This is similar to using the estimate, job or proposed works tabs within a development.

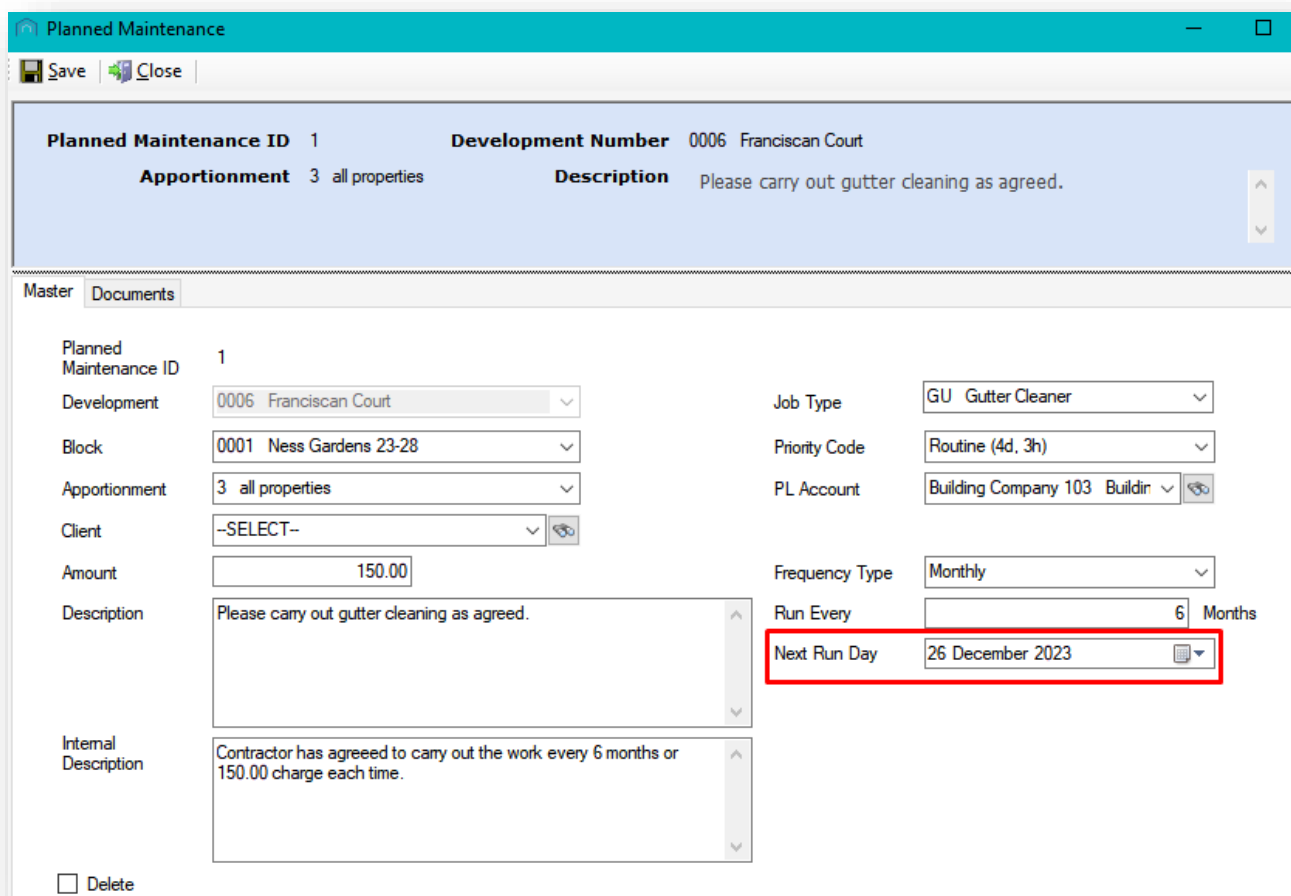
## AMENDING A PLANNED MAINTENANCE RECORD

You can return to an individual planned maintenance record if you wish to edit this at any point. For example, the building may be having a roof repair and you don't wish to process the next instance of the gutter cleaning job until the roof repair is completed.

To do this, go to the main Planned Maintenance tab or the Planned Maintenance tab within a development, double-click the individual record or click to highlight it and then click on the **Amend** button in the action bar.



This will open the planned maintenance record and you can use the **Next Run Day** field to change the date you would next like it to be run.



**Planned Maintenance**

Save Close

**Planned Maintenance ID** 1 **Development Number** 0006 Franciscan Court  
**Apportionment** 3 all properties **Description** Please carry out gutter cleaning as agreed.

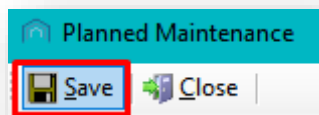
Master Documents

Planned Maintenance ID 1  
 Development 0006 Franciscan Court  
 Block 0001 Ness Gardens 23-28  
 Apportionment 3 all properties  
 Client --SELECT--  
 Amount 150.00  
 Description Please carry out gutter cleaning as agreed.  
 Internal Description Contractor has agreed to carry out the work every 6 months or 150.00 charge each time.

Job Type GU Gutter Cleaner  
 Priority Code Routine (4d, 3h)  
 PL Account Building Company 103 Buildin  
 Frequency Type Monthly  
 Run Every 6 Months  
**Next Run Day** 26 December 2023

☐ Delete

Don't forget to save the record to update it before closing the window.

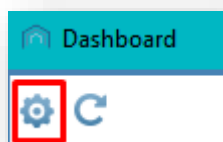


## PLANNED MAINTENANCE DASHBOARD CARDS

There is a new Planned Maintenance Dashboard card available which can be used to help you keep track of outstanding planned maintenance records which are due to be processed through to create the jobs.

If you don't already have the Planned Maintenance card available on your Dashboard, then you can add this in the Dashboard settings.

Click on the **Settings** cog once you have launched the dashboard.



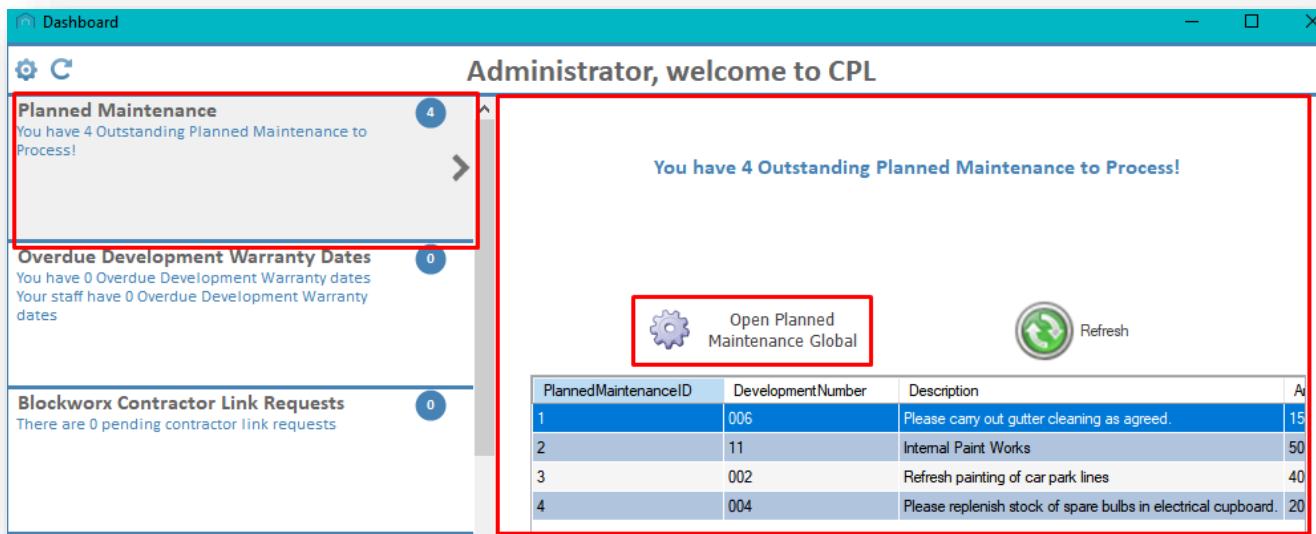
You can tick to view planned maintenance for any developments you are marked as a Property Manager for and also for any user you are marked as a supervisor for in CPL.

Dashboard Settings			
Dashboard Module	Active	Include Subordinates	
PlannedMaintenance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>↑</div> <div>↓</div>
Overdue Development Warranty Dates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Blockworx Contractor Link Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contractors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Unresolved Insurance Claims	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Client Notices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Use the green tick to save any changes you have made.



The Dashboard card will list all outstanding planned maintenance records with a next run date of today or earlier.



**Dashboard**

Administrator, welcome to CPL

**Planned Maintenance**  
You have 4 Outstanding Planned Maintenance to Process!

**Overdue Development Warranty Dates**  
You have 0 Overdue Development Warranty dates  
Your staff have 0 Overdue Development Warranty dates

**Blockworx Contractor Link Requests**  
There are 0 pending contractor link requests

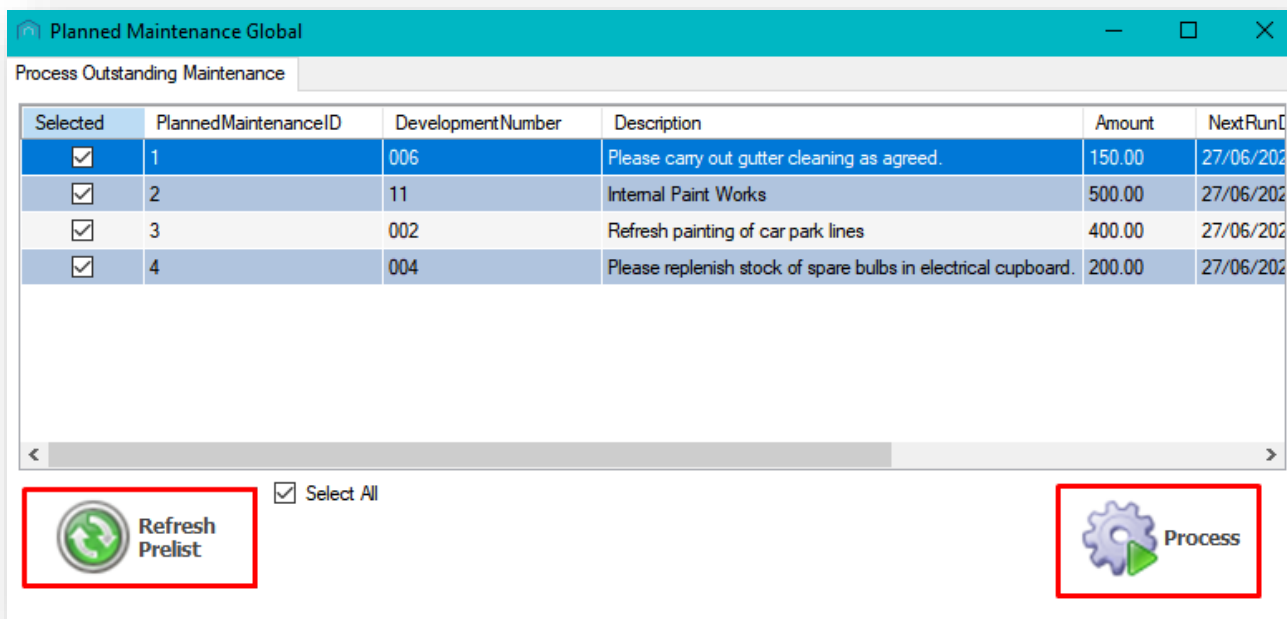
You have 4 Outstanding Planned Maintenance to Process!

Open Planned Maintenance Global

Refresh

PlannedMaintenanceID	DevelopmentNumber	Description	Amount
1	006	Please carry out gutter cleaning as agreed.	150.00
2	11	Internal Paint Works	500.00
3	002	Refresh painting of car park lines	400.00
4	004	Please replenish stock of spare bulbs in electrical cupboard.	200.00

Clicking on the **Open Planned Maintenance Global** option will launch the **Planned Maintenance Global** screen where you can process all outstanding records after clicking **Refresh Prelist** to load these outstanding records onto the screen.



**Planned Maintenance Global**

Process Outstanding Maintenance

Selected	PlannedMaintenanceID	DevelopmentNumber	Description	Amount	NextRunDate
<input checked="" type="checkbox"/>	1	006	Please carry out gutter cleaning as agreed.	150.00	27/06/2022
<input checked="" type="checkbox"/>	2	11	Internal Paint Works	500.00	27/06/2022
<input checked="" type="checkbox"/>	3	002	Refresh painting of car park lines	400.00	27/06/2022
<input checked="" type="checkbox"/>	4	004	Please replenish stock of spare bulbs in electrical cupboard.	200.00	27/06/2022

☒ Select All

Refresh Prelist

Process

This is the same screen which can be accessed from the main Planned Maintenance tab.

*Please contact CPL Support if you wish us to enable Planned Maintenance in your CPL database. The Support Team can also configure the number of days before a planned maintenance is marked as outstanding for it to appear in the list to be processed.*



## 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).