



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

PROPOSED WORKS

TRAINING GUIDE

JULY 2022

Version 2.0



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INTRODUCTION

A Proposed Work is a fund or special collection account which is separate from the normal invoicing procedure to gauge interest in or collect money for a job of abnormally high value in advance of the work being done.

It is important that monies collected for such proposed works are kept separate from the development and/or company accounts and not used to cover normal costs. Money received is therefore kept in Proposed Works until such time that the works are instructed and then the charge can be billed to the remaining clients yet to pay.

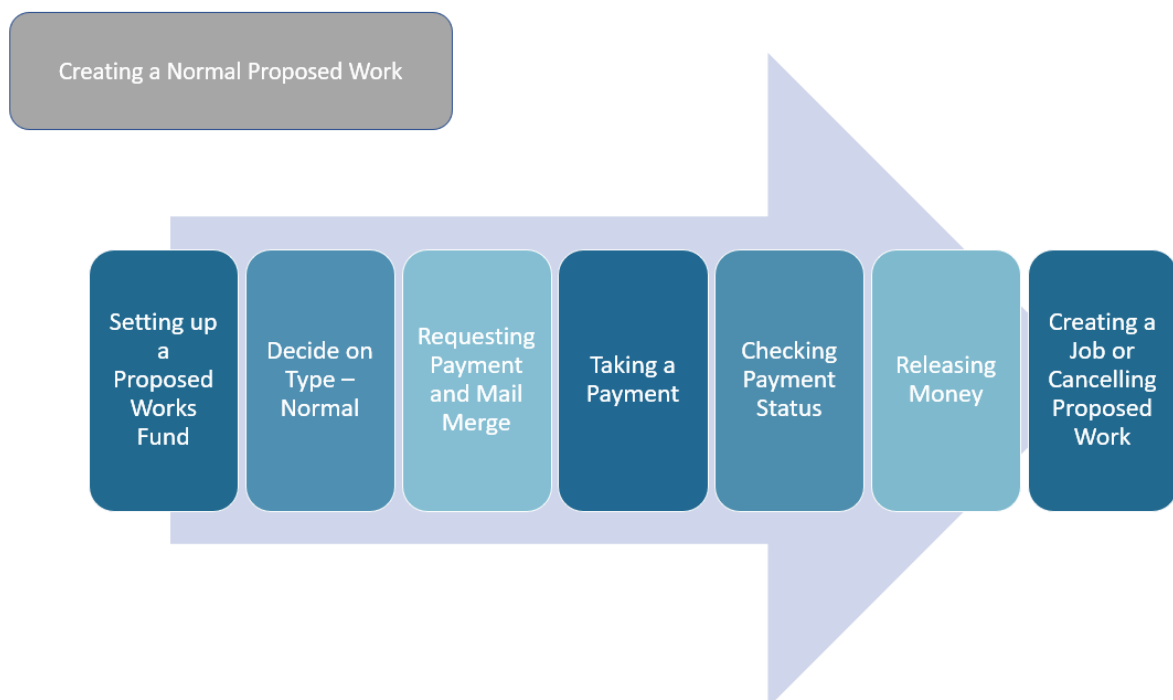
In CPL there are two types of proposed works available: **Normal** and **Voting Only**.

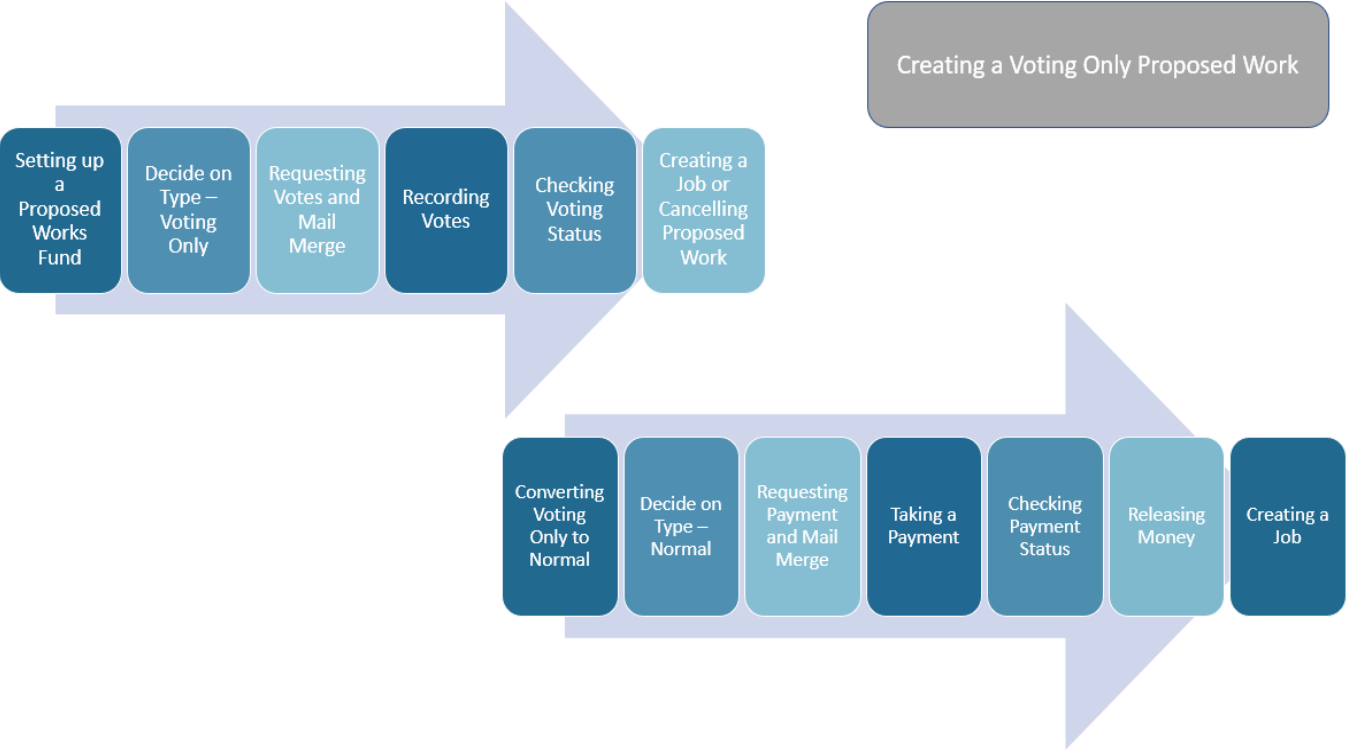
Normal is a request for monies for a proposed work, and **Voting Only** is for your clients to have their say on if they feel the work should be carried out.

It is possible to start off with a **voting only** proposed work and then edit this to recategorise as a **normal** proposed work. This would mean you don't have to enter the information again in order to collect money if this suits your purpose. Alternatively, you may wish to start again with a **normal** proposed work when you come to collect payment.

As these two stages can work independently of each other they will be explained separately in this training guide.

Please note there is also a Proposed Work tab which can be added to the CPL Client Portal which will allow clients to vote and pay funds towards any works. This will be explained later in this training guide.



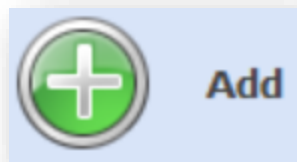


SETTING UP A NEW PROPOSED WORK FUND

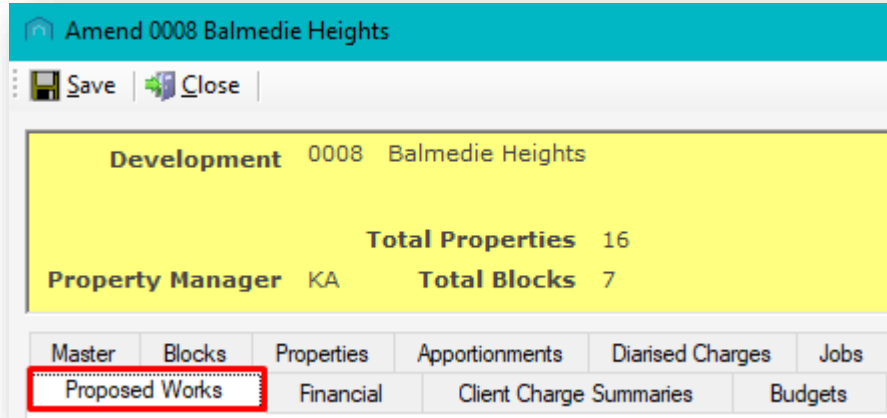
From inside CPL, select the main **Proposed Works** tab from the top of the screen.



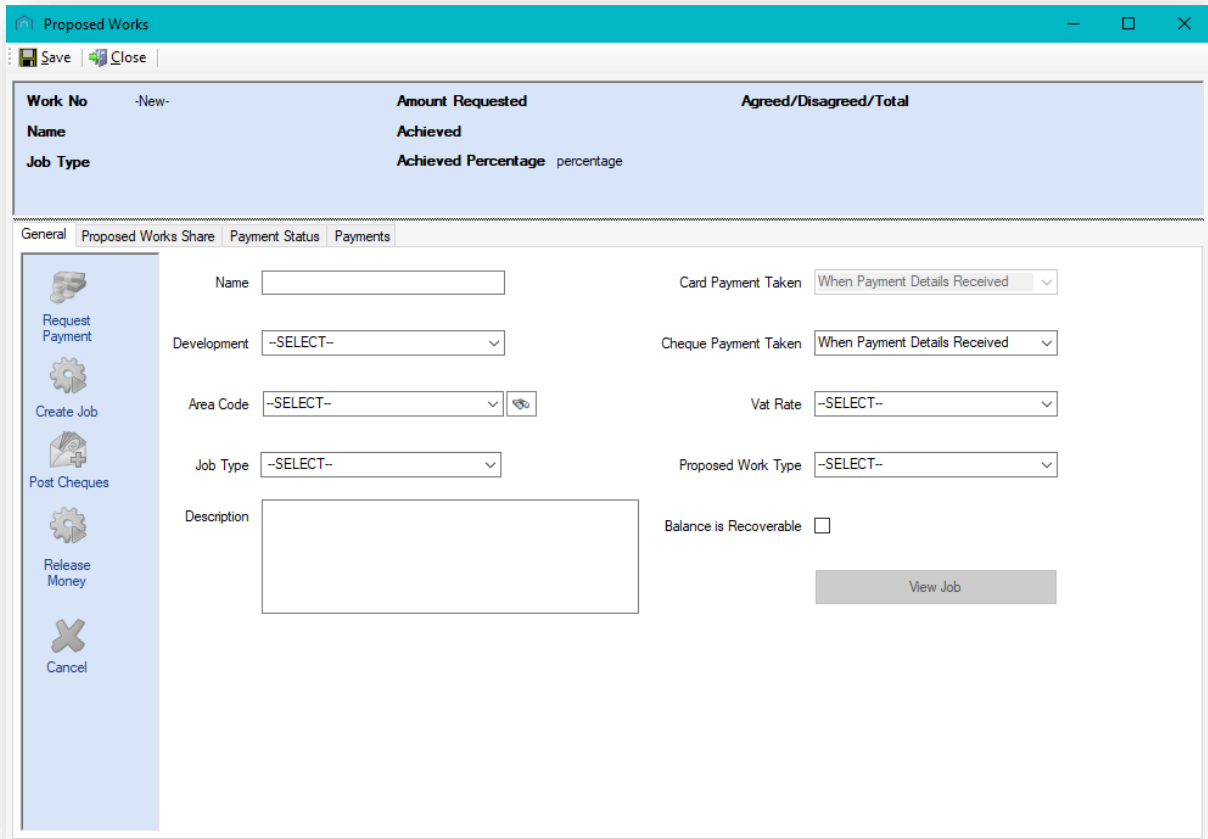
To set up a new proposed work, click the **Add** button on the left-hand side of the page.



Alternatively, within the relevant development screen, select the **Proposed Works** tab and click the **Add** button to create a proposed work for this development.



Find This will open the **Proposed Works** screen and allow you to enter the information to request payment from your clients.



In the **Name** field enter an appropriate name for your proposed work.

Choose the appropriate **Development**. If you have clicked **Add** from the Proposed Works tab within a development then this field will already be pre-populated for you.

If you notice an **Area Code** field this will only be relevant if you are using **Development Area Codes**. If not then you can ignore this field.

Select the relevant **Job Type** and enter the **Description**.

Decide at which point you would like the **Cheque Payment Taken** if this is an option in your system.

Select the relevant **VAT** rate.

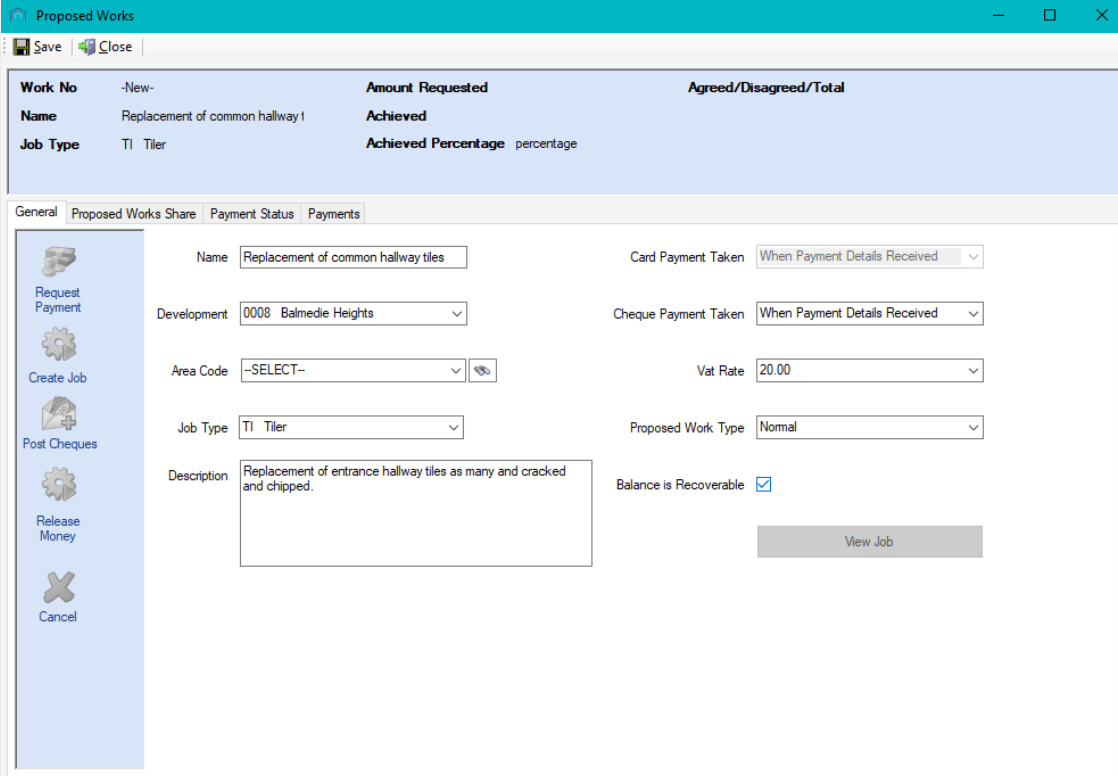
In the **Proposed Work Type** field select **Normal** if you are requesting funds from clients.

There is a **Balance is Recoverable** option available on this first Proposed Work screen.

Balance is Recoverable ☐

Placing a tick in this box will inform the system that the apportioned amounts for each client are recoverable if not paid. If these remain outstanding, they will therefore be included when you run your reminders process in **Client Notices**.

Voting Only will be explained later in this guide.



The screenshot shows the 'Proposed Works' window with the 'General' tab selected. The window has a title bar with 'Proposed Works' and standard window controls. Below the title bar are 'Save' and 'Close' buttons. A table at the top displays job details:

Work No	-New-	Amount Requested	Agreed/Disagreed/Total
Name	Replacement of common hallway t	Achieved	
Job Type	TI Tiler	Achieved Percentage	percentage

Below the table are tabs for 'General', 'Proposed Works Share', 'Payment Status', and 'Payments'. The 'General' tab is active, showing a sidebar with icons for 'Request Payment', 'Create Job', 'Post Cheques', 'Release Money', and 'Cancel'. The main form area contains the following fields:

- Name: Replacement of common hallway tiles
- Development: 0008 Balmedie Heights
- Area Code: --SELECT--
- Job Type: TI Tiler
- Description: Replacement of entrance hallway tiles as many and cracked and chipped.
- Card Payment Taken: When Payment Details Received
- Cheque Payment Taken: When Payment Details Received
- Vat Rate: 20.00
- Proposed Work Type: Normal
- Balance is Recoverable: ☒
- View Job button

Once you have completed the information on the **General** tab within the **Proposed Works** screen you can click to move to the **Proposed Works Share** tab.

PROPOSED WORK FROM AN ESTIMATE






Please note that if you created an estimate of the type **Proposed Work** then you will automatically be transferred through to the initial proposed work screen at the point where you have accepted a quote. The information from your estimate will be brought through onto this **General** screen:

Proposed Works Wizard

Save Close

Work No	-New-	Amount Requested	Agreed/Disagreed/Total
Name		Achieved	
Job Type		Achieved Percentage	percentage

General - Step 1 Proposed Works Share


Request Payment

Create Job

Post Cheques

Release Money

Cancel

Name Balmedie - Painting of all common hallway

Development 0008 Balmedie Heights

Area Code --SELECT--

Job Type PA Painter

Description From Proposed Works Estimate Request 30198 using quote 30424: Please provide a quote to cover the painting of all common hallways across Balmedie Heights Development.

Card Payment Taken When Payment Details Received

Cheque Payment Taken When Payment Details Received

Vat Rate --SELECT--

Proposed Work Type --SELECT--

Balance is Recoverable ☐

View Job



PROPOSED WORKS SHARE

Proposed Works

Save Close

Work No	-New-	Amount Requested	Agreed/Disagreed/Total
Name	Replacement of common hallway 1	Achieved	
Job Type	TI Tiler	Achieved Percentage	percentage

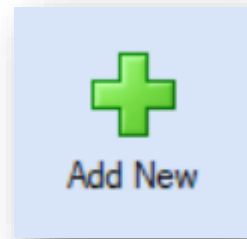
General Proposed Works Share Payment Status Payments


Add New

Delete

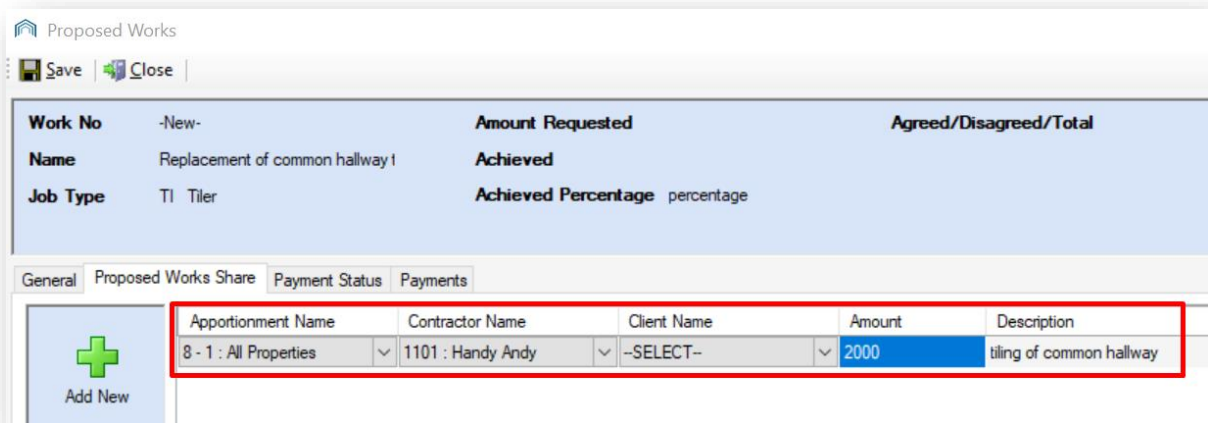
Apportionment Name	Contractor Name	Client Name	Amount	Description

This tab requires that you provide additional information in the form of the **Apportionment Name** being applied in this instance, the **Contractor Name**, an individual **Client Name**, if this is appropriate, the **Amount** due and any relevant **Description**.

To begin to enter this information, click the **Add New** icon in the action bar on the left-hand side of the screen.



You can then select from or enter information into each of the different fields.



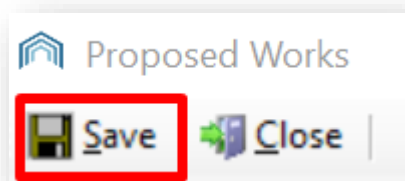
Select the **Apportionment Name** from the available apportionments for this development from the drop-down menu in the grid.

Select the **Contractor Name** for the appropriate contractor for the proposed work from the drop-down menu in the grid.

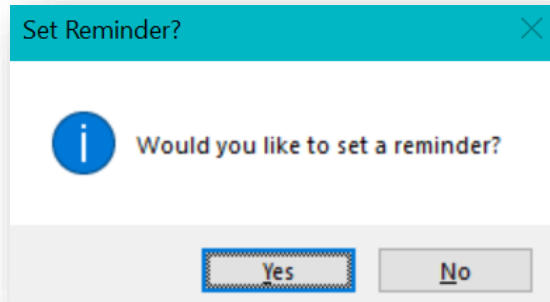
Set the **Amount** in total you have been quoted and a basic description for the work or this share of the work.

You can add additional items to this screen if appropriate. If a job will have multiple contractors carrying out the work or you need to apply further lines with different apportionments then you can do this here by using the **Add New** button on the left-hand side to add another row.

Once you have entered the required information click on the **Save** icon at the top left of the tab.

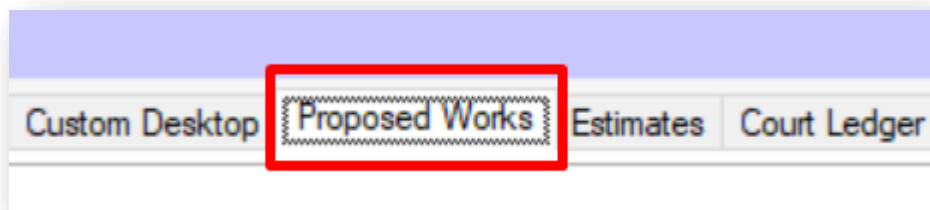


At this point you will be offered the opportunity to set a **Reminder** in the system. This will allow you to receive a notification to come back and check on the progress of this proposed work.

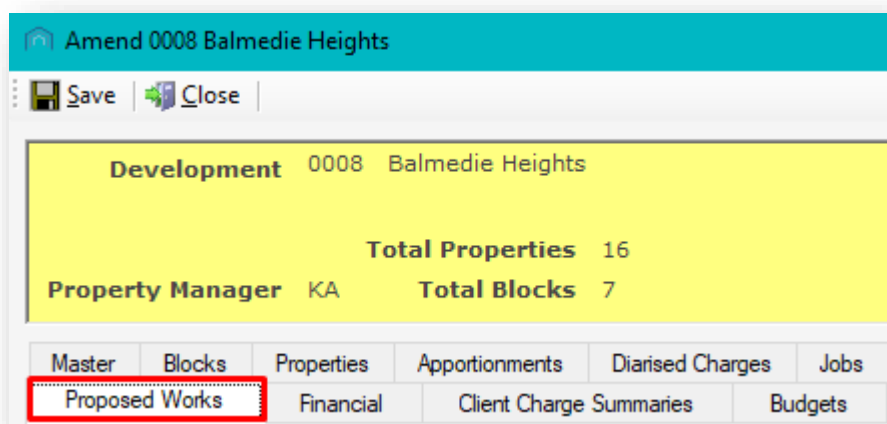


REQUESTING PAYMENT

You will now be able to request that your clients submit payment for the work you are proposing. If you have navigated away from your proposed work then select the main **Proposed Works** tab from the top of the screen.



Alternatively, within the relevant development screen, select the **Proposed Works** tab to display only the proposed works for this particular development.



Find the proposed work you previously created and double-click to open this item. Alternatively, click to highlight the correct proposed work in the list and click on the **Amend** button.

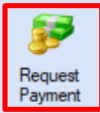
On the **General** tab you will notice that the **Request Payment** icon has now become available in the left-hand action panel when previously this was greyed out.

Proposed Works

Save Close

Work No	20225	Amount Requested	£3,000.00
Name	Window painting	Achieved	£0.00
Job Type	PA Painter	Achieved Percentage	0.0%

General Proposed Works Share Payment Status Payments Documents Memos Nominal Transfer

 Name Window painting

Development 0008 Balmedie Heights

After clicking on this, the **Documents: Distribute (New)** screen will now open and allow you to use a Proposed Work document template to contact your clients and request that they submit payment.

Documents: Distribute (New)

Distribute Type pro work DO NOT USE Proposed Works

Template

Search...

Type	Name	De
Proposed Works	Development Prop. Works	Dev
Estimate Requested	Proposed Work Estimated	Pro

Description

Sent From Administrator

Audience

Type Private (Account only)

Web Type --SELECT--

Distribution Tools

Show Tools

Print/Send Generate Documents Email / SMS Get Recipients

Proposed Works Filter

Development --SELECT--

Proposed Work 20225 - Window painting

Has Agreement All

☐ Has Email

Recipients

Recipient	Last Emailed	Emailed
<input checked="" type="checkbox"/> 00080041 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008007 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080081 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008010 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008011 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080122 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080131 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008014 - Client 0...	19/03/2018	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> 0008016 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008017 - Client 0...	19/03/2018	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> 00080181 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080211 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008024 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008027 - Client 0...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080281 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080331 - Client ...	28/11/2017	<input checked="" type="checkbox"/>

Make sure the correct Document **Template** is selected towards the top-left of the screen.

Template

Search...

Type	Name	De
Proposed Works	Development Prop. Works	De
Estimate Requested	Proposed Work Estimated	Pro

Enter a suitable description in the **Description** field, for example, the date and the contents of the communication you are sending.

Description

06-010-20 Hallway notice

SELECTING RECIPIENTS AND SENDING YOUR MERGES

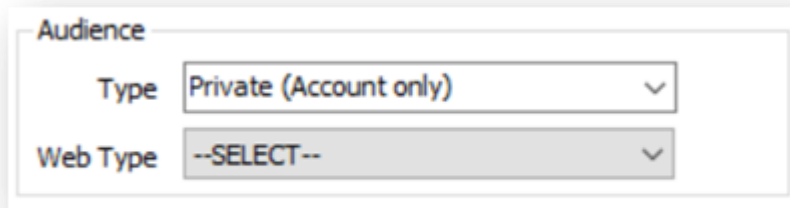
On the right-hand side of this screen, you will see the list of **Recipients** which has already been pre-populated based on the development you selected in your **General** proposed work tab. You can select all by ticking the check box at the top of the list or tick to select individual clients:

Recipients

<input checked="" type="checkbox"/>	Recipient	Last Emailed	Emailed
<input checked="" type="checkbox"/>	00040151 - Clie...		<input type="checkbox"/>
<input checked="" type="checkbox"/>	00040152 - Ne...		<input type="checkbox"/>
<input checked="" type="checkbox"/>	0006001 - Clie...		<input type="checkbox"/>
<input checked="" type="checkbox"/>	0006002 - Clie...		<input type="checkbox"/>
<input checked="" type="checkbox"/>	0006003 - Clie...	31/11/2018	<input type="checkbox"/>

If your clients have opted for email correspondence, you will see a tick in the box in the column on the right-hand side of the recipients list.

There is an **Audience** section on the left-hand side of the screen. If you have not subscribed to a Client Portal and Client App with CPL, then please leave these set to Type: **Private (Account only)** and Web Type: **--Select--**

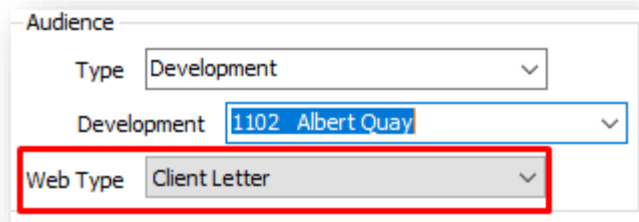


Audience

Type

Web Type

If you have subscribed to a client portal and app for your clients then you can use the **Type** and **Web Type** filter to select how you would like this information to appear on the client portal.



Audience

Type

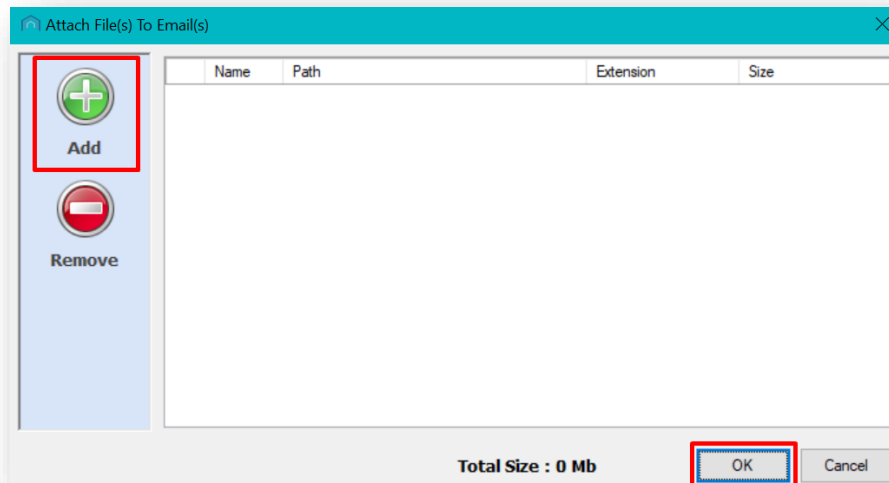
Development

Web Type

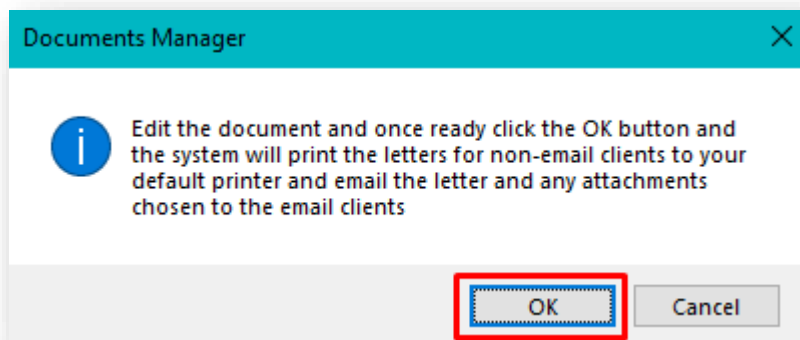
In order to generate the mail merges so that you can check them before you send them out to clients (this will be your last chance to change anything in the letter) click the **Print/Send** button:



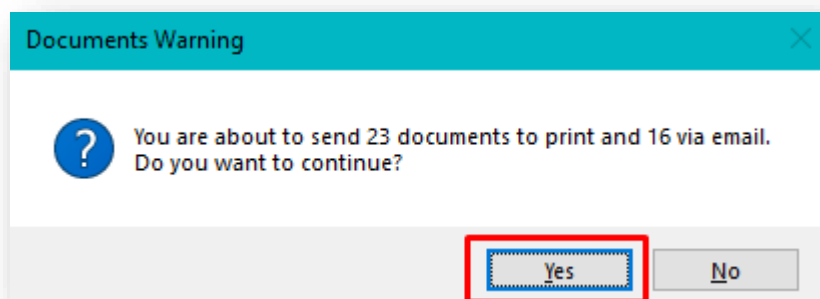
CPL will open the **Attach File(s) To Email(s)** screen to offer you an option to send any attachments. You may wish to send photos or related quotes for the work you are proposing. To attach a file, click on the **Add** button and browse for the file. When you have uploaded all attachments or you wish to proceed without any attachments, click on **OK**.



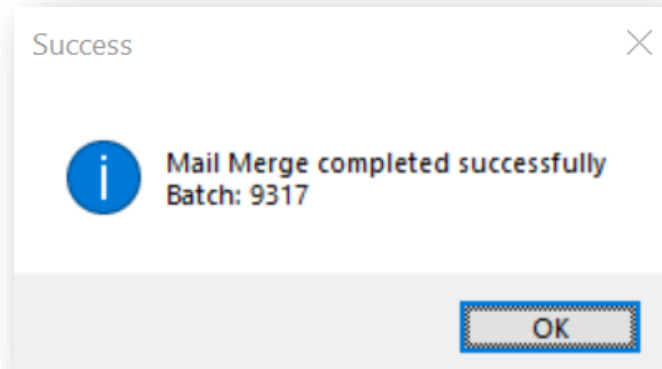
The system will now open Word for you and display your merged results. Check the information is correct and click **OK** in the pop-up window which appears, without closing Word.



You will then see a **Documents Warning** pop-up window letting you know how many documents are being printed or emailed. This is based on the contact preferences you have set for your clients. If these mail merge results meet your requirements, accept them by clicking on **Yes** and CPL will then print/ email your mail merged documents.



You will see a **Success** pop-up window with the batch number listed.



Once you finished distributing your request for funds for the proposed works to your clients, you can exit the screen and await any payments coming in.

If you are using a Client Portal and are subscribed to the **Documents** or the **Proposed Works** tabs then your clients will be able to access the information you have shared straight from the portal in the **Documents/ Proposed Works** area where they will also be able to click to access any attachments.

If you your clients have access to the **Documents** tab then they will see this here:

Documents			
You can edit what goes here 5			
Development Letter			
Client Letter			
Date Uploaded	Description	View Document	View Attachments
08/10/2020	Test for Attachments 2	Download Document	
08/10/2020	Test for Attachments in Web Portal	Download Document	
13/08/2020	Proposal open for voting to install a door entry system for the development's main door.	Download Document	View Attachments
13/08/2020	Proposal to engage a tree surgeon to prune overhanging trees from west development boundary. Requesting payment.	Download Document	View Attachments

If your clients have access to the **Proposed Works** tab in the Client Portal then they will see the document there:

Proposed Works

You can edit what goes here 8

Show Archived

List Details Documents

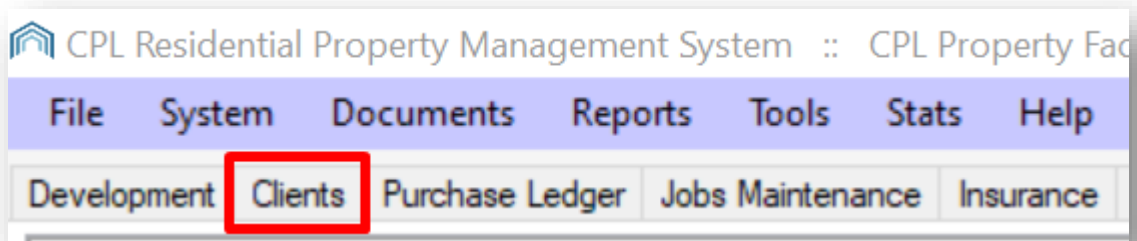
Number: 20226

Upload Date	Description	Download
03/03/2020	Proposed works to increase height of entrance wall at Albert Quay	Download Document
05/03/2020	Request for payment - entrance wall Albert Quay	Download Document
05/03/2020	Request for payment - entrance wall Albert Quay	Download Document

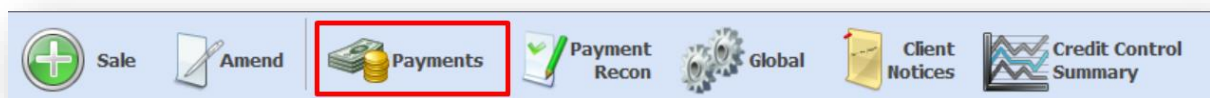
TAKING A PROPOSED WORKS PAYMENT

Proposed Works payments should be made through the client payments screen unless your clients have access to the client portal. This will be covered in the next section below.

In the main CPL window select the **Clients** tab.



Use the **Client Filter/Search** to locate your appropriate client details and then click on the **Payments** icon in the action bar highlighted in blue.



This will open the **Daily Posting for Client Account** screen for your selected client where you can set the details of the amount and type of payment your client wishes to make.

Daily Posting for Client Account: 00080041 - Client 00080041

Save and Close | Close

Client Details Client 00080041 00080041 Dev 8 Street		Status Normal	
SO16 8LS		Current Balance	£532.10
		Balance Due	£532.10
		Float Balance	£250.00
		P/W Balance	£274.89
Telephone No			
Email Address karen-ann.mcswiggan@cplsoftware.com			

Daily Posting

Account Number 00080041 - Client 00080041 ... all

Date 30/01/2020

Post Amount 532.10 Float Amount 250.00


Payment Type Cash


Payment Received - Cash

Instalment Details View Instalment

Dr/Cr Cr

Proposed Works 0.00 ...

 Post

Before making the payment, click on this button to the right of the **Proposed Works** amount towards the bottom right of the screen .

This will open the **Active Proposed Works** screen which lists all Proposed Works relevant for that particular client.

Active Proposed Works

<input type="checkbox"/>	Work No	Proposed Work	Payable	Paid	Outstanding	To Pay
<input type="checkbox"/>	20225	Window painting	85.71	0.00	85.71	0.00
<input type="checkbox"/>	20224	External Painting	57.14	0.00	57.14	0.00
<input type="checkbox"/>	20217	Gutter replacement	37.15	0.00	37.15	0.00
<input type="checkbox"/>	20223	External Redecoration	2400.00	0.00	2400.00	0.00

View Memos OK

By ticking in the appropriate box on the left of this screen, you can select which proposed work it is you wish to make the payment for.

If you double-click in the **To Pay** field in the grid on this screen you can set the amount that this client is paying. This allows you to make partial payments for a particular proposed works fund.

As you can see in the screenshot below, this client is choosing to pay £40 to a proposed works fund where £57.14 is the total which has been requested.

Active Proposed Works


<input type="checkbox"/>	Work No	Proposed Work	Payable	Paid	Outstanding	To Pay
<input type="checkbox"/>	20225	Window painting	85.71	0.00	85.71	0.00
<input checked="" type="checkbox"/>	20224	External Painting	57.14	0.00	57.14	40.00
<input type="checkbox"/>	20217	Gutter replacement	37.15	0.00	37.15	0.00
<input type="checkbox"/>	20223	External Redecoration	2400.00	0.00	2400.00	0.00

View Memos OK

Click on **OK** when you have entered the amount the client is paying and you will be returned to the **Daily Posting for Client Account** screen with the appropriate payment amount entered into the **Proposed Works** field.

Proposed Works ...

Court Ledger ...

 Post

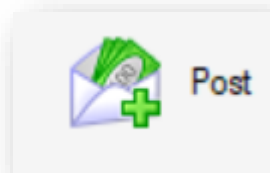
Make sure you clear any amount listed in the **Post Amount** field unless the client is also making a payment to their outstanding balance.

Post Amount

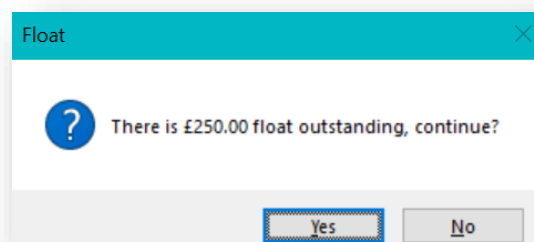
Make sure you also clear any amount from the **Float Amount** field if the payment does not contain an amount towards the float.

Float Amount 250.00

Once you have taken care of these options and you are ready to make the client payment, you can click on the **Post** icon at the bottom right of this screen.

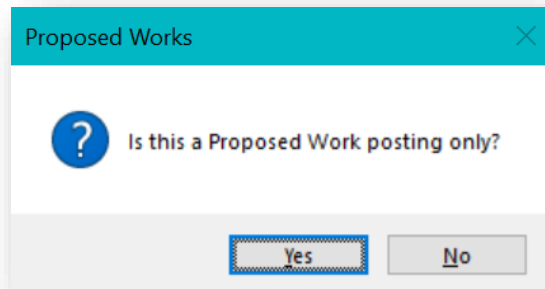


If there is a float amount outstanding for this client you will then see a pop-up message informing you of this and asking if you would like to continue.



Click on **Yes** if you wish to proceed without paying anything towards the outstanding float amount.

If you are only choosing to make a payment for a proposed works amount you will then see another pop-up message asking you to confirm that this is a proposed works only payment.



The payment will be made and you will then be returned to the **Daily Posting for Client Account** screen.

USING THE CLIENT PORTAL TO MAKE A PROPOSED WORK PAYMENT

Your clients can submit payment for the proposed work directly through the client portal if you have this.

To do this your clients will click on the **Proposed Work** tab in the dark blue bar.



They will be taken to a list of any proposed works where they will be able to select the relevant item by clicking anywhere in this row.

Proposed Works

You can edit what goes here 8

Show Archived

ListDetailsDocuments

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 Votes	Voting Only	£1000.00	£0.00

They will be able to view the detail for the proposed work including the name, whether it is voting only or normal, what the full target amount is and what their share of that is. They can also submit a vote and make a payment directly from the options on this screen.

Proposed Works

You can edit what goes here 8

List

Details

Documents

Please vote on whether you would agree for this proposed work to go forward:

FOR

AGAINST

£120.00 share outstanding to be paid.

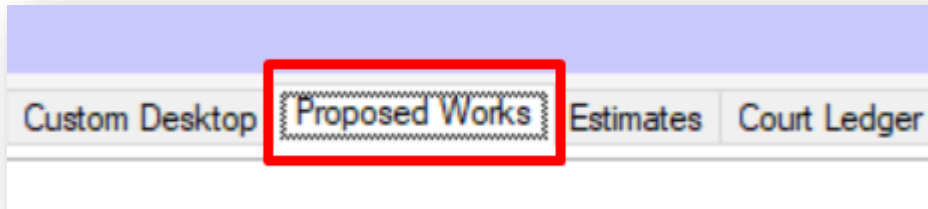
MAKE PROPOSED WORK PAYMENT

Proposed Work No	20227
Proposed Work Name	Door for External Bin Store
Created Date	05 March 2020
Status	Awaiting Client Funds ⓘ
Description	Door to be fitted to external bin store
Proposed Work Type	Normal ⓘ
Target Amount	£600.00
Achieved Amount	£0.00
Your Share	1/5
Amount Due	£600.00

PAYMENT STATUS

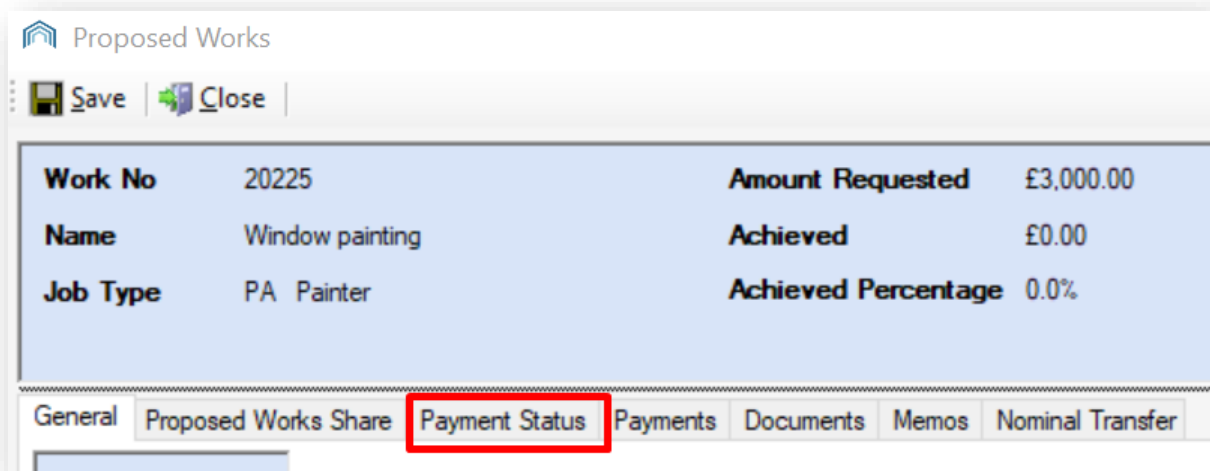
Once your clients start to make a payment towards the fund you can return to the proposed work and check on the status of payments.

Select the main **Proposed Works** tab from the top of the screen.



Using the **Proposed Work Filter/Search** you will be able to find the proposed work you previously created and double-click to open this.

Click on the **Payment Status** tab.



The screenshot shows the 'Proposed Works' window. At the top, there is a title bar with the CPL logo and the text 'Proposed Works'. Below the title bar, there are two buttons: 'Save' and 'Close'. The main area of the window contains a table with the following data:

Work No	20225	Amount Requested	£3,000.00
Name	Window painting	Achieved	£0.00
Job Type	PA Painter	Achieved Percentage	0.0%

At the bottom of the window, there is a tabbed interface with the following tabs: 'General', 'Proposed Works Share', 'Payment Status', 'Payments', 'Documents', 'Memos', and 'Nominal Transfer'. The 'Payment Status' tab is highlighted with a red rectangular box.

In here you can see exactly who has and who has not paid for the proposed work.

Proposed Works

SaveClose

Work No	20224	Amount Requested	£2,000.00	Agreed/Disagreed/Total	2/0/16
Name	External Painting	Achieved	£211.43		
Job Type	PA Painter	Achieved Percentage	10.6%		

General

Proposed Works Share

Payment Status

Payments

Documents

Memos

Nominal Transfer

Account No	Client Name	Payable	Paid	Balance	Memos	Agreed	Agreed Narrative	Cheque Received	Outstanding
00080041	Client 00080041	£171.43	£171.43	£532.10		Yes	Client Payment Received	No	£0.00
0008007	Client 0008007	£57.14	£0.00	£72.40		Undecided			£57.14
00080081	Client 00080081	£114.29	£0.00	£0.00		Undecided			£114.29
0008010	Client 0008010	£57.14	£0.00	£158.75		Undecided			£57.14
0008011	Client 0008011	£57.14	£0.00	-£176.74		Undecided			£57.14
00080122	Client 00080122	£57.14	£40.00	£187.85		Yes	Client Payment Received	No	£17.14
00080131	Client 00080131	£114.29	£0.00	£363.10		Undecided			£114.29
0008014	Client 0008014	£57.14	£0.00	£66.57		Undecided			£57.14
0008016	Client 0008016	£57.14	£0.00	£138.67		Undecided			£57.14
0008017	Client 0008017	£57.14	£0.00	£136.37		Undecided			£57.14
00080181	Client 00080181	£171.43	£0.00	£0.00		Undecided			£171.43
00080211	Client 00080211	£228.57	£0.00	£0.00		Undecided			£228.57
0008024	Client 0008024	£57.14	£0.00	-£313.06		Undecided			£57.14
0008027	Client 0008027	£57.14	£0.00	£0.00		Undecided			£57.14
00080281	Client 00080281	£342.86	£0.00	£875.34		Undecided			£342.86
00080331	Client 00080331	£342.86	£0.00	£805.33		Undecided			£342.86

At the top of the screen you will notice the summary information of who has paid beside the **Agreed/Disagreed/Total**. You can also see the total requested and the amount paid in the summary information.

Below this you can see payments made by individual clients and any outstanding balance due.

The **Paid** column shows who has paid and how much has been paid. If a client has only made a partial payment, you can see from the **Balance** column any outstanding balance they still owe.

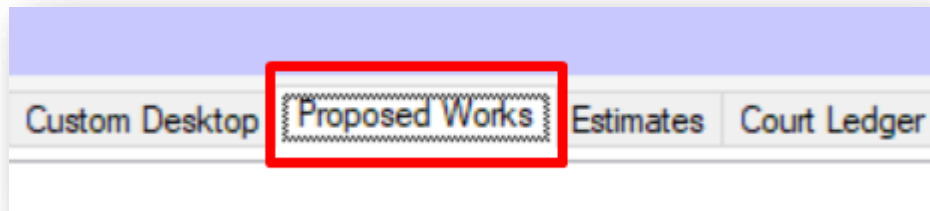
If you find that you need to chase clients for payment you can send them reminder letters from within the Documents tab. In the **Documents: Distribute (New)** screen you can use the **Recipients** filter to only send your communication to specific clients.

You can also add any notes into the Memos tab for someone else who may be working with you on this proposed work.

RELEASE MONEY

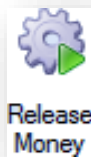
When you have all or the majority of payments received for the proposed work you may want to release these funds.

Select the main **Proposed Works** tab from the top of the screen.



Using the **Proposed Work Filter/Search** you will be able to find the proposed work you previously created and double-click to open this. Remain on the **General** tab.

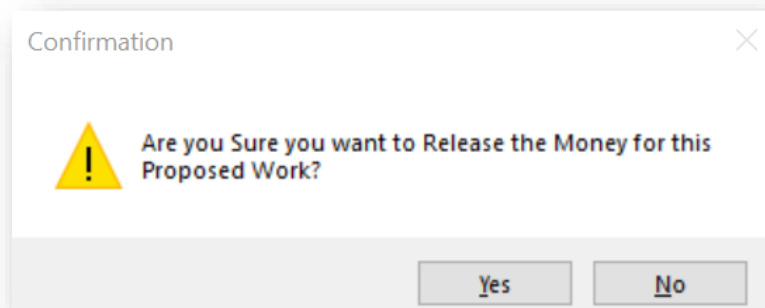
In the blue action panel on the left of the screen you will notice there is a **Release Money** icon.



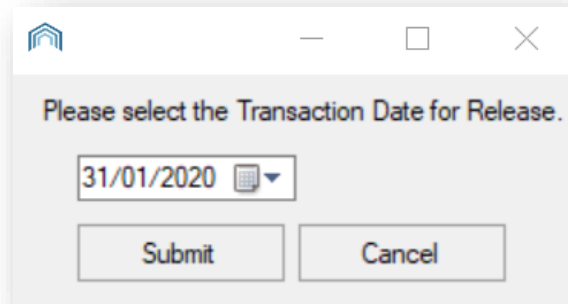
This takes any funds which have already been submitted by clients out of the proposed works payment and transfers them into either the Hold File, the Charge File or the Transaction File. This is dependent upon on a System Setting which CPL can activate for you. Please contact support to have this set or if you would like it changed.

The money will then be available when the corresponding invoice from your contractor for the job comes in.

When you click on the **Release Money** icon you will see a **Confirmation** pop-up message asking if you are sure you want to release it.



Once you click on **Yes** you will see another pop-up window asking you to **Please select the Transaction Date for Release**. Set the date you wish and click on **Submit**.



On releasing the money, you will see another pop-up window confirming that money has been released for the clients who have paid and you will be given the appropriate **Batch Number**. On clicking **OK** you will be returned to the main proposed works screen.

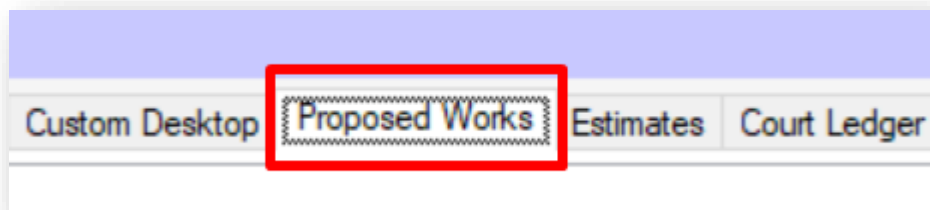
If required, you can return to release further funds from the proposed work when more money is submitted by clients.

When you have reached a certain percentage of collected funds for the proposed work you may now want to go ahead and instruct your contractor to proceed with the job.

CREATING A JOB FROM YOUR PROPOSED WORK

When you are ready to create a job from your proposed work you can do this directly from the **Proposed Works** main screen.

If you have navigated away from the screen, select the main **Proposed Works** tab from the top of the screen.

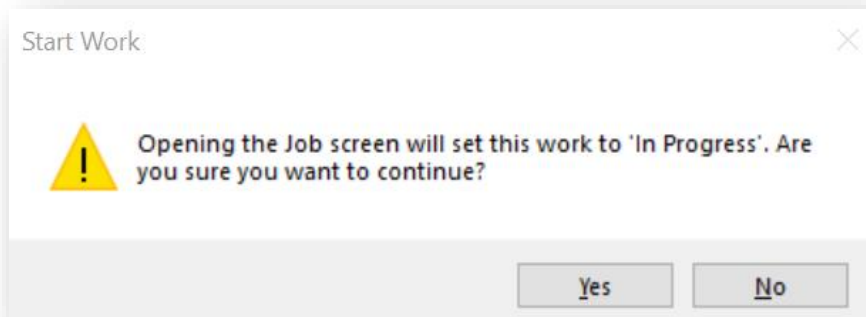


Using the **Proposed Work Filter/Search** you will be able to find the proposed work you previously created and double-click to open this.

On the general tab you will see there is a **Create Job** icon in the left-hand side action panel.



When you click on this icon you will receive a pop-up message titled **Start Work** and warning you that this will set your work to **In Progress**. If you are happy with this click on **Yes** to continue.



This will open up the **Jobs for Development** window at **Stage 2** of the job creation process with the appropriate details filled out in the relevant fields. You can now process and create the job as you would normally.

If you navigate away from this screen, you can find the proposed works job under the **Jobs Maintenance** tab where you can update its progress through to completion.

Whilst the job is underway you can still receive client payments towards the proposed works, and even instruct further reminder letters/ emails if necessary.

POST CHEQUES

If you choose the option for the cheques to be processed **at the point of payment details received** then cheque postings will be treated just like all other payments and hit the bank account at the point of payment.



However, if you chose the option for cheques to be taken **at the point the works are approved** then they are only recorded in the system when you process the payment.

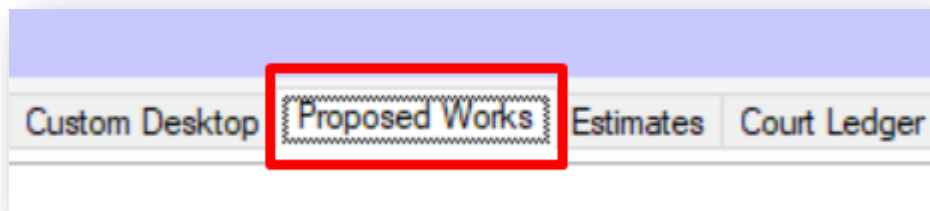
The **Post Cheques** option is only designed for the latter option – as it puts the cheques on a payment reconciliation ready for banking.

SETTING UP A NEW PROPOSED WORK VOTE

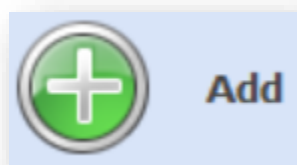
One of the features of a proposed work is the ability to ask clients to vote for whether they would like the work to be carried out prior to asking them to submit any funds.

You can use voting to assess whether you would like to move ahead with asking for funds to be submitted.

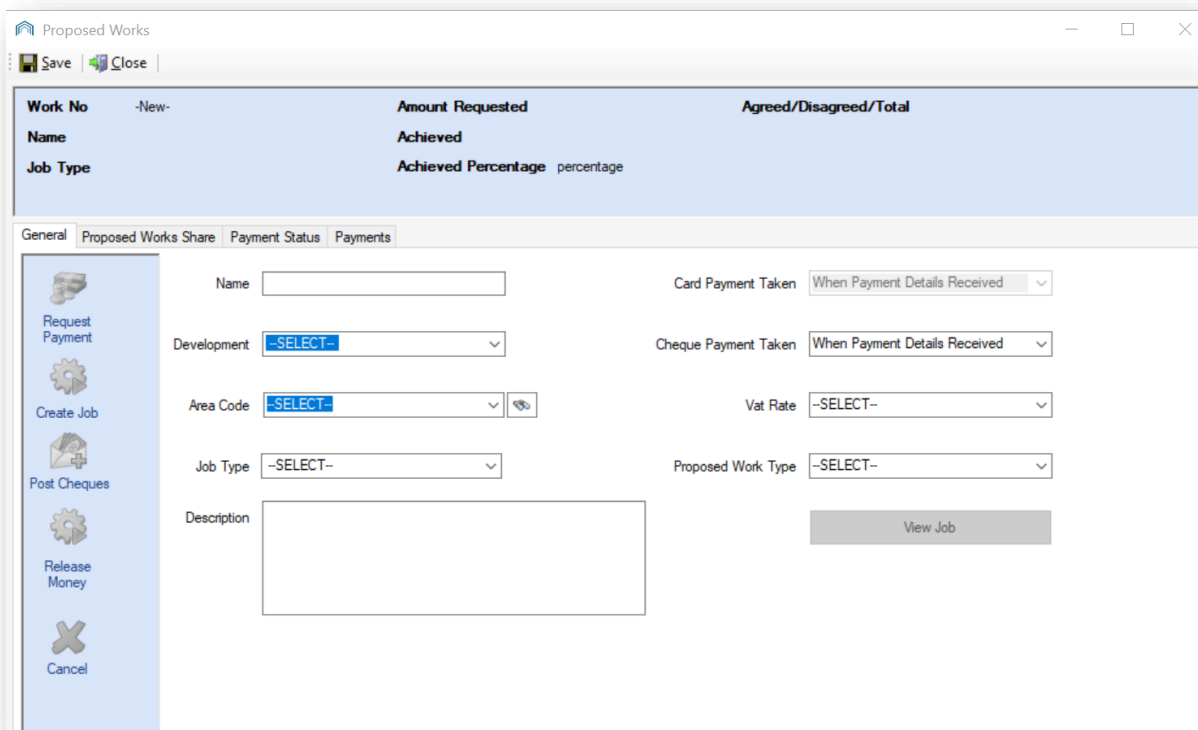
From inside CPL, select the main **Proposed Works** tab from the top of the screen.



To set up a new proposed work vote, click the **Add** button on the left-hand side of the page.



This will open the **Proposed Works** screen and allow you to enter the information to request that your clients vote.



In the **Name** field enter an appropriate name for your proposed work.

Choose the appropriate **Development**.

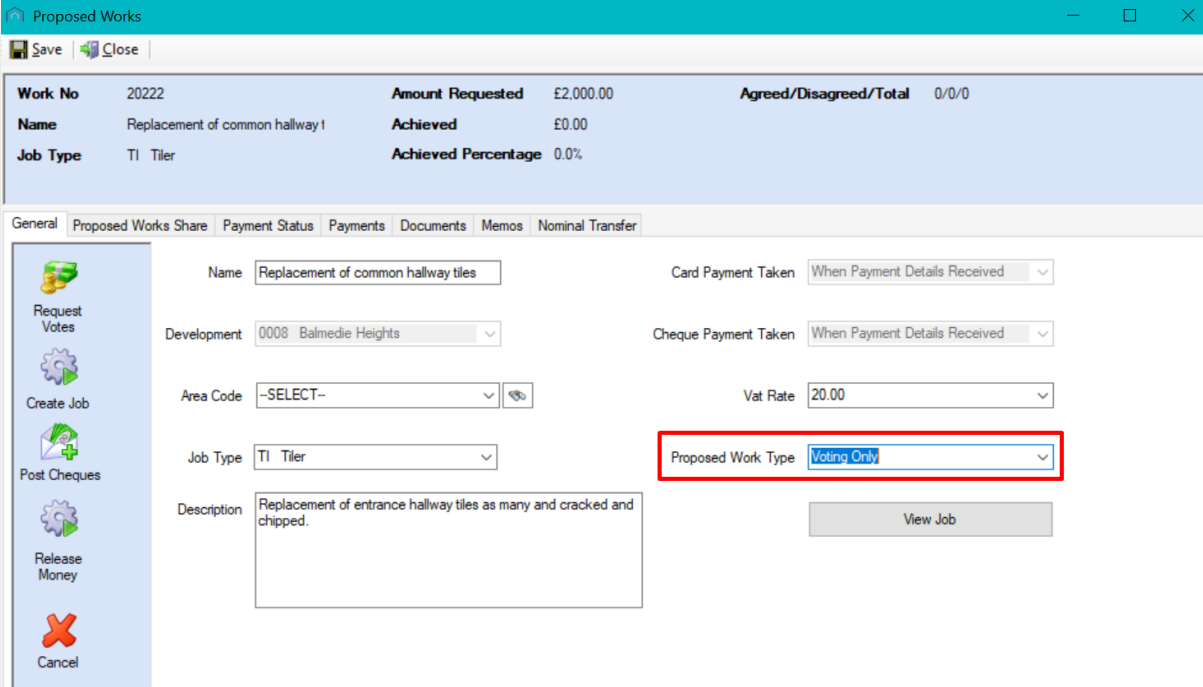
If you notice an **Area Code** field this will only be relevant if you are using **Development Area Codes**. If not then you can ignore this field.

Select the relevant **Job Type** and enter the **Description**.

Decide at which point you would like the **Cheque Payment Taken** if this is an option in your system.

Select the relevant **VAT** rate.

In the **Proposed Work Type** field select **Voting Only** if you are requesting your clients vote on whether they would like the work to go ahead.

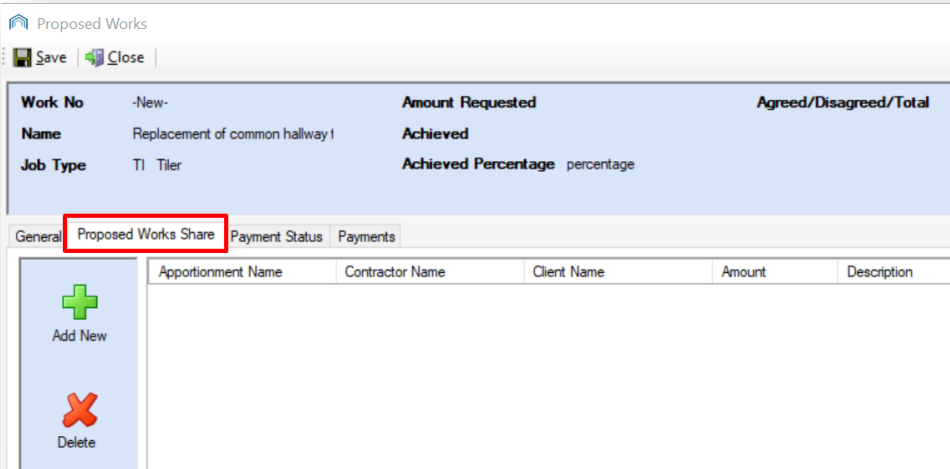


The screenshot shows the 'Proposed Works' window with the following details:

- Work No:** 20222
- Name:** Replacement of common hallway t
- Job Type:** TI Tiler
- Amount Requested:** £2,000.00
- Achieved:** £0.00
- Achieved Percentage:** 0.0%
- Agreed/Disagreed/Total:** 0/0/0

The 'General' tab is selected. The 'Proposed Work Type' dropdown is highlighted with a red box and set to 'Voting Only'. Other fields include 'Name' (Replacement of common hallway tiles), 'Development' (0008 Balmedie Heights), 'Area Code' (-SELECT-), 'Card Payment Taken' (When Payment Details Received), 'Cheque Payment Taken' (When Payment Details Received), 'Vat Rate' (20.00), and 'Description' (Replacement of entrance hallway tiles as many and cracked and chipped).

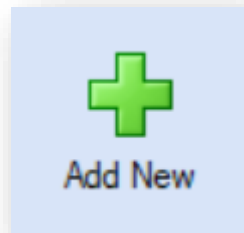
Once you have completed the information on the **General** tab within the **Proposed Works** screen you can click to move to the **Proposed Works Share** tab.



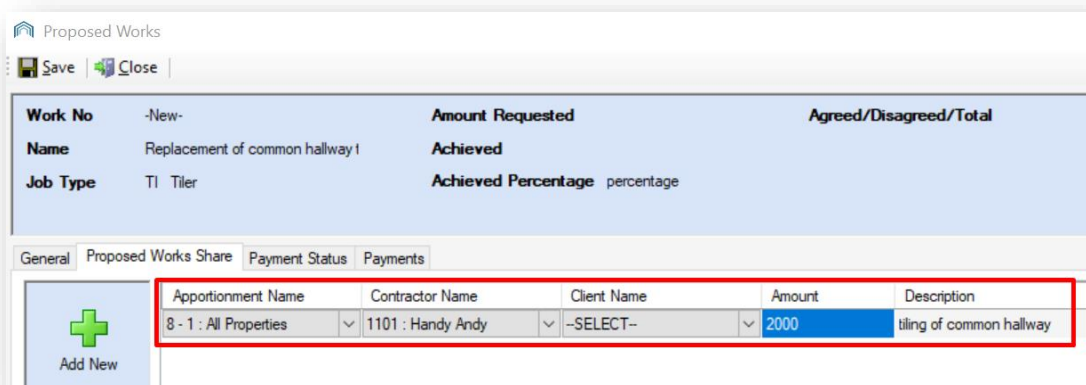
The screenshot shows the 'Proposed Works' window with the 'Proposed Works Share' tab selected. The 'Proposed Works Share' tab is highlighted with a red box. The 'General' tab is also visible. The 'Proposed Works Share' tab contains a table with the following columns: Apportionment Name, Contractor Name, Client Name, Amount, and Description. The 'Add New' button is highlighted with a green plus icon, and the 'Delete' button is highlighted with a red minus icon.

This tab will allow you to provide additional information such as the **Apportionment Name** being applied in this instance, **Contractor Name**, an individual **Client Name**, if this is appropriate, the **Amount** due and any relevant **Description**.

To enter this information, click the **Add New** icon on the left-hand side of the screen.



You can then select or enter into each of the different fields.



Apportionment Name	Contractor Name	Client Name	Amount	Description
8 - 1 : All Properties	1101 : Handy Andy	--SELECT--	2000	tiling of common hallway

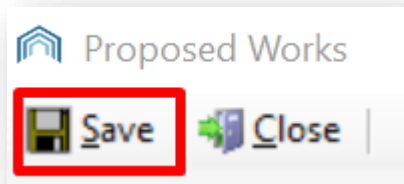
Select the **Apportionment Name** from apportionments you have set up for this development from the drop-down menu in the grid.

Select the **Contractor Name** for the contractor who provided you with the quote for the proposed work from the drop-down menu in the grid.

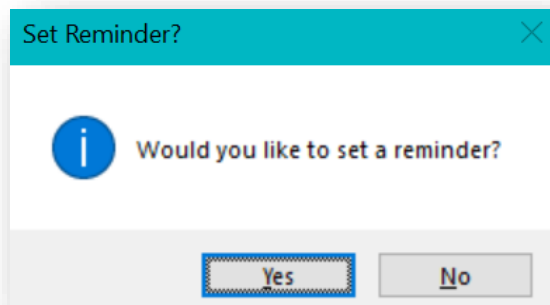
Set the **Amount** in total you have been quoted and a basic description for the work or this share of the work.

You can add additional items to this screen if appropriate. If a job will have multiple contractors carrying out the work or you need to apply further lines with different apportionments then you can do this here by using the **Add New** button on the left-hand side to add another row.

Once you have entered the required information click on the **Save** icon at the top left of the tab.



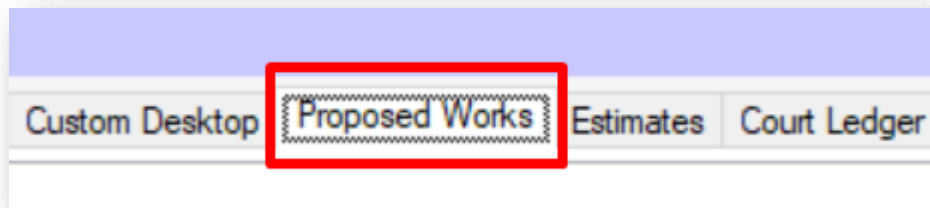
At this point you will be offered the opportunity to set a **Reminder** in the system. This will allow you to receive a notification to return to check on responses.



REQUESTING VOTES

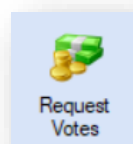
You will now be able to request that your clients submit their vote for the work you are proposing.

If you have navigated away from your proposed work then select the main **Proposed Works** tab from the top of the screen.

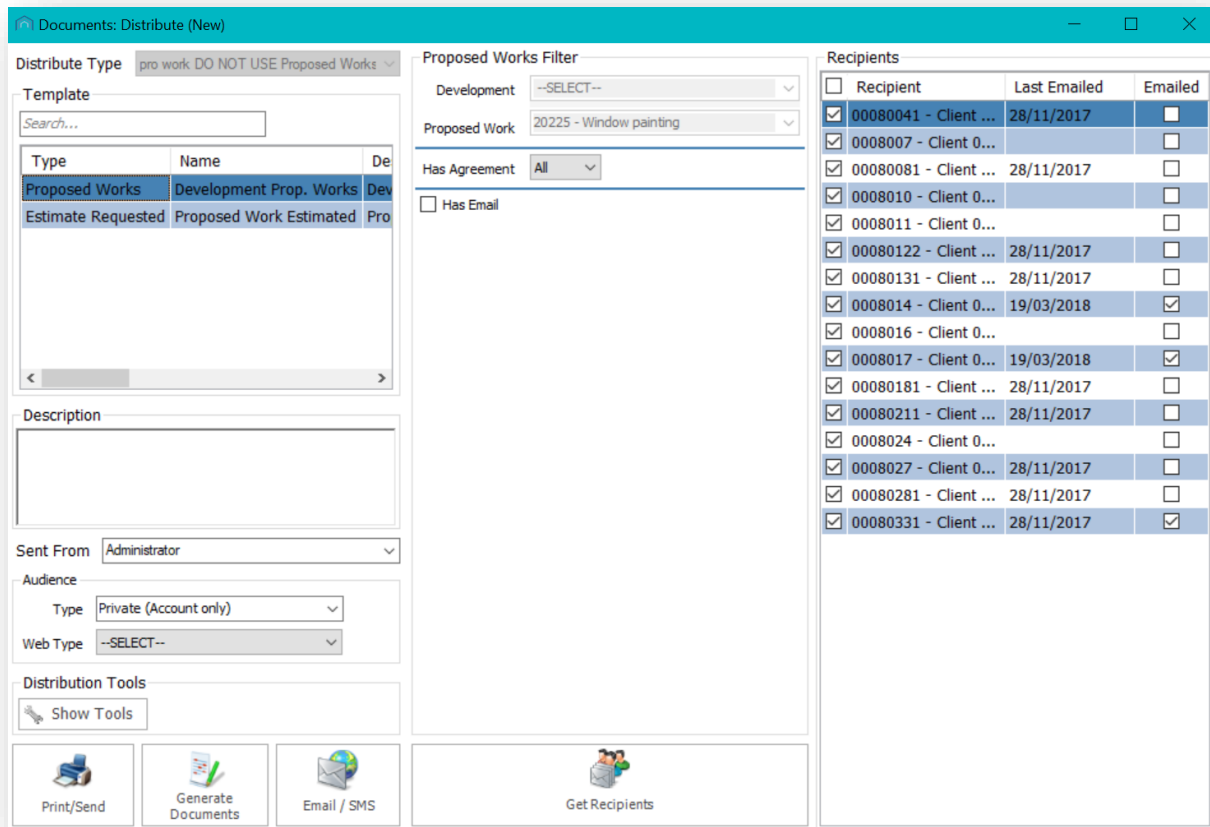


Find the proposed work you previously created and double-click to open this.

On the **General** tab you will notice that the **Request Votes** icon has now become available in the left-hand action panel.



After clicking on this, the **Documents: Distribute (New)** screen will now open and allow you to contact your clients to ask for their vote.



Documents: Distribute (New)

Distribute Type: pro work DO NOT USE Proposed Works

Template

Search...

Type	Name	De
Proposed Works	Development Prop. Works	Dev
Estimate Requested	Proposed Work Estimated	Pro

Proposed Works Filter

Development: --SELECT--

Proposed Work: 20225 - Window painting

Has Agreement: All

☐ Has Email

Recipients

<input type="checkbox"/> Recipient	Last Emailed	Emailed
<input checked="" type="checkbox"/> 00080041 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008007 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080081 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008010 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008011 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080122 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080131 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008014 - Client 0...	19/03/2018	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> 0008016 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008017 - Client 0...	19/03/2018	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> 00080181 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080211 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008024 - Client 0...		<input type="checkbox"/>
<input checked="" type="checkbox"/> 0008027 - Client 0...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080281 - Client ...	28/11/2017	<input type="checkbox"/>
<input checked="" type="checkbox"/> 00080331 - Client ...	28/11/2017	<input checked="" type="checkbox"/>

Sent From: Administrator

Audience

Type: Private (Account only)

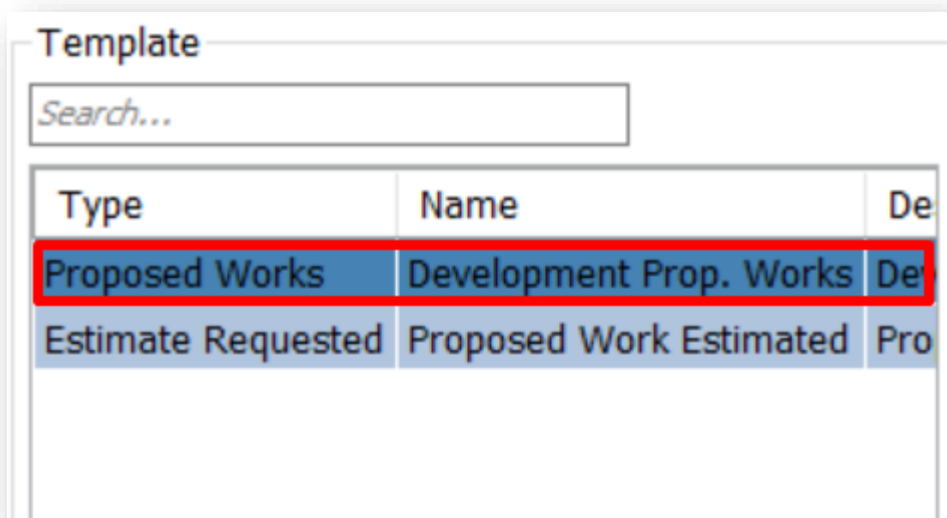
Web Type: --SELECT--

Distribution Tools

Show Tools

Print/Send | Generate Documents | Email / SMS | Get Recipients

Make sure the correct template is selected towards the top-left of the screen.



Template

Search...

Type	Name	De
Proposed Works	Development Prop. Works	De
Estimate Requested	Proposed Work Estimated	Pro

Enter a suitable description in the **Description** field, for example, the date and the contents of the communication you are sending.

Description

06-010-20 Hallway notice

SELECTING RECIPIENTS AND SENDING YOUR MERGES

On the right-hand side of this screen, you will see the list of **Recipients** which has already been pre-populated based on the development you selected in your proposed work. You can select all recipients by ticking the tickbox at the top of the list or tick to select individual clients:

Recipients			
<input checked="" type="checkbox"/>	Recipient	Last Emailed	Emailed
<input checked="" type="checkbox"/>	00040151 - Clie...		<input type="checkbox"/>
<input checked="" type="checkbox"/>	00040152 - Ne...		<input type="checkbox"/>
<input checked="" type="checkbox"/>	0006001 - Clie...		<input type="checkbox"/>
<input checked="" type="checkbox"/>	0006002 - Clie...		<input type="checkbox"/>
<input checked="" type="checkbox"/>	0006003 - Clie...	31/11/2018	<input type="checkbox"/>

If your clients have opted for email correspondence, you will see a tick in the box in the column on the right-hand side of the recipients list.

There is an **Audience** section on the left-hand side of the screen. If you have not subscribed to a Client Portal and Client App with CPL, then please leave these set to Type: **Private (Account only)** and Web Type: **--Select--**

Audience

Type

Private (Account only)

Web Type

--SELECT--

If you have subscribed to a client portal and app for your clients then you can use the **Type** and **Web Type** filter to select how you would like this information to appear on the client portal.

Audience

Type

Development

Web Type

This will allow the request for votes to appear on a section (the **Web Type**) of the **Documents** tab of the Client Portal if you have subscribed to this. If you have subscribed to the **Proposed Work** tab in your Client Portal then this request for votes will also appear there.

In order to generate the mail merges so that you can check them before you send them out to clients (this will be your last chance to change anything in the letter) click the **Print/Send** button:



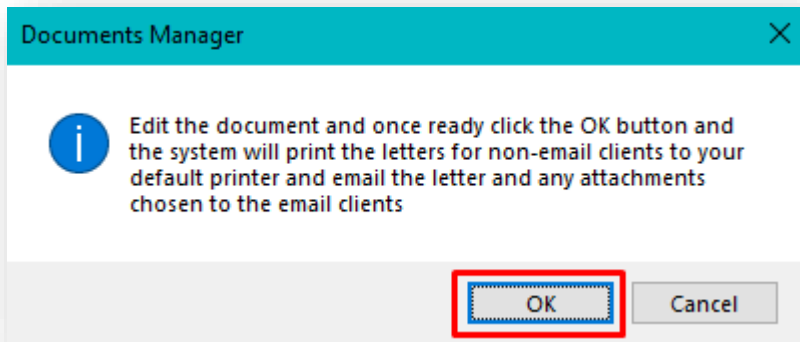
CPL will open the **Attach File(s) To Email(s)** screen to offer you an option to send any attachments. You may wish to send photos or related quotes you receive for the work you are proposing. To attach a file click on the **Add** button and browse for the file. When you have uploaded all attachments or you wish to proceed without any attachments, click on **OK**.

Attach File(s) To Email(s)

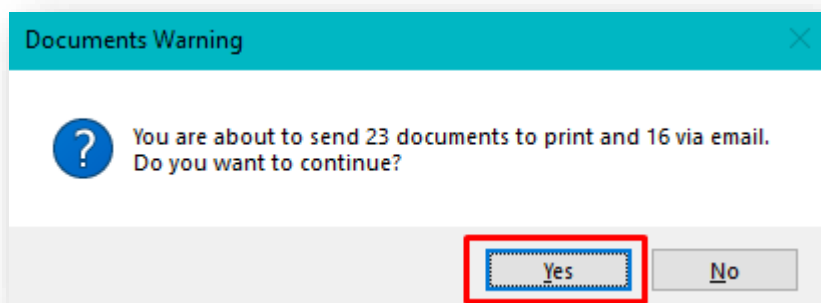
Name	Path	Extension	Size

Total Size : 0 Mb

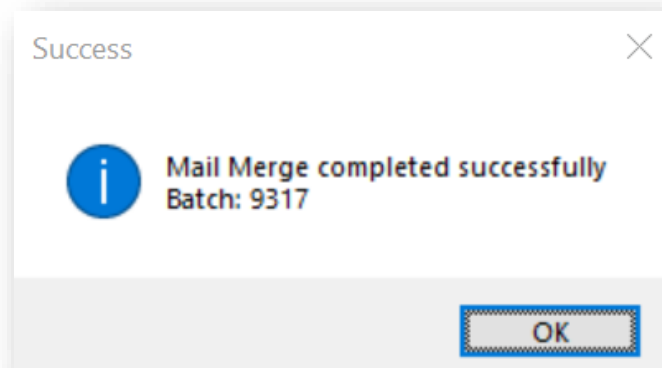
The system will now open your template in Microsoft Word and display your merged results. Check the information is correct and click **OK** in the pop-up window which appears, without closing Word.



You will then see a **Documents Warning** pop-up window letting you know how many documents are being printed or emailed. This is based on the contact preferences you have set for your clients. If these mail merge results meet your requirements, accept them by clicking on **Yes** and CPL will then print/ email your mail merged documents.



You will see a **Success** pop-up window with the batch number listed.



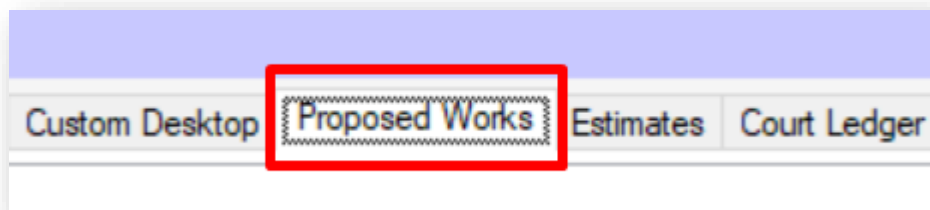
Once you have written to the owners with a request for their votes for the proposed works, you can exit the screen and await any contact in return.

RECORDING VOTES IN CPL

If a client contacts you either by post, email or phone to inform of you of their vote, you will need to record it inside CPL.

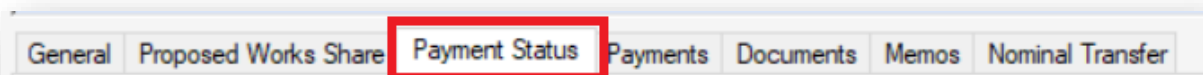
Please note that you would not have to record votes in this way when the Proposed Works tab in the Client Portal is being used as the system will automatically register any votes made through this method.

If you have navigated away from your proposed work then select the main **Proposed Works** tab from the top of the screen.



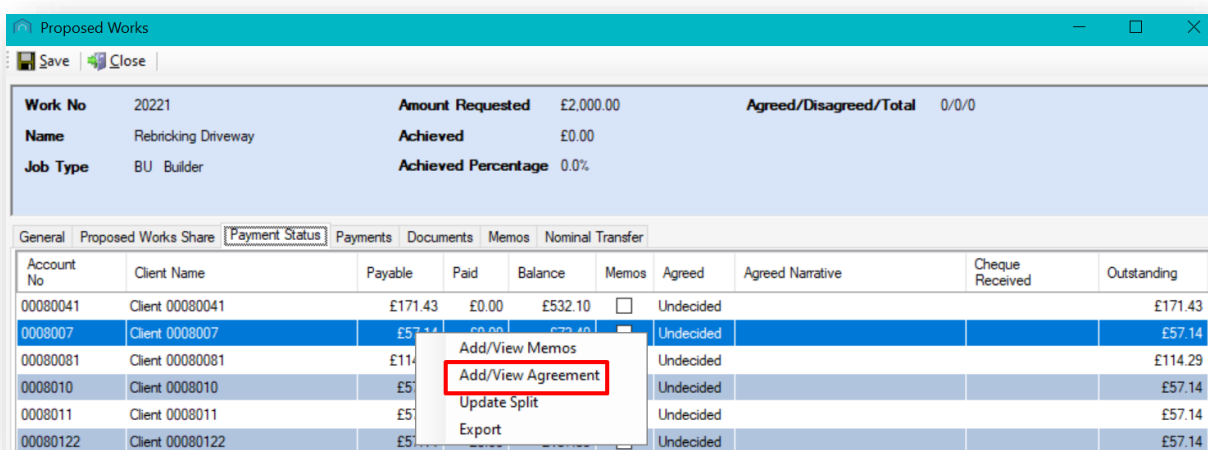
Find the proposed work you previously created and double-click to open this.

Now select the **Payment Status** tab in this window.

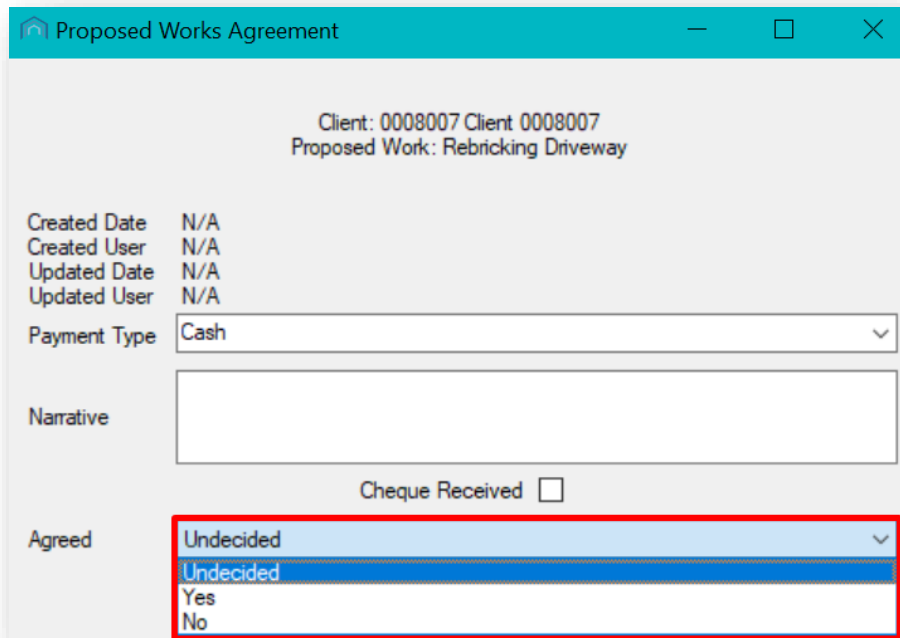


You will see the list of clients who you have asked to vote on your proposed work. Select the appropriate client who has contacted you and right-click on them to open a menu.

From this menu select the **Add/View Agreement** option.



This opens the **Proposed Works Agreement** window. It is here you will be registering the client's vote.



At the bottom of this window is a drop-down **Agreed** field. There are three options to choose from:

- Undecided
- Yes
- No

Make your selection according to the information provided by the client. You can add any notes to the **Narrative** box and click on **OK** to save this.

VOTING USING THE CLIENT PORTAL

Alternatively, your clients can submit their vote themselves using the CPL client portal if you have made this available to them. They will be able to do this if you have purchased the Proposed Works module for the client portal.

Once they have logged into the portal they should access the **Proposed Work** tab in the dark blue bar if this is available.



They will be taken to a list of any proposed works where they will be able to select the relevant item by clicking anywhere in this row.

Proposed Works

You can edit what goes here 8

Show Archived

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 Votes	Voting Only	£1000.00	£0.00

They will then be taken to the **Details** screen where they will have an option to submit their vote by clicking on **For** or **Against**.

List
Details
Documents

Please vote on whether you would agree for this proposed work to go forward:

FOR
AGAINST

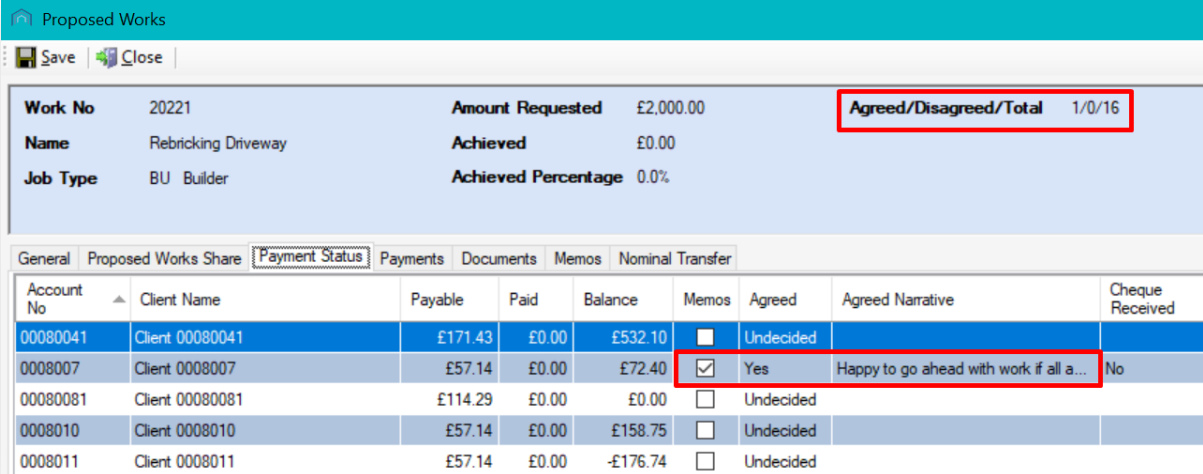
After choosing an option they will then see a pop-up screen asking them to confirm their choice which will be followed by another pop-up letting them know that voting is complete.

They will be able to return to the proposed work detail in the client portal at any time and see information on the status of all voting for the proposed work.

Voting For	3
Voting Against	0
Voting Properties	5
Total Votes Received	3

VIEWING RECORDED VOTES

However your votes were recorded, either by using the **Payment Status** tab in Proposed Works, or by your client voting using the client portal you will see the vote registered in the **Agreed** column in the grid in the main window in CPL, along with any narrative you entered in the next column along. You will notice the **Agreed/Disagreed/Total** being updated in the summary panel at the top of the screen.



Proposed Works

Save Close

Work No: 20221 Amount Requested: £2,000.00 Agreed/Disagreed/Total: 1/0/16

Name: Rebricking Driveway Achieved: £0.00

Job Type: BU Builder Achieved Percentage: 0.0%

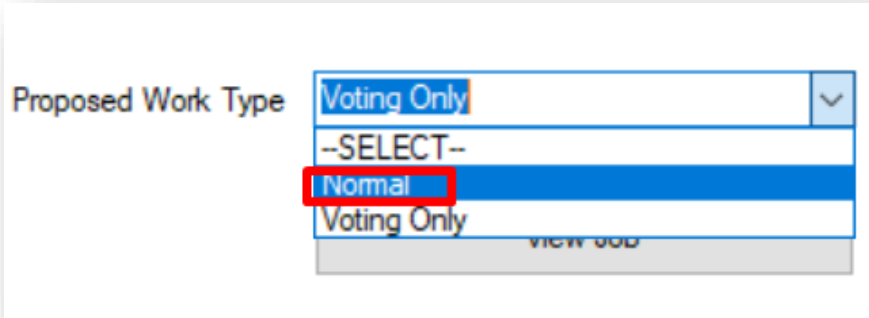
General Proposed Works Share **Payment Status** Payments Documents Memos Nominal Transfer

Account No	Client Name	Payable	Paid	Balance	Memos	Agreed	Agreed Narrative	Cheque Received
00080041	Client 00080041	£171.43	£0.00	£532.10		<input type="checkbox"/> Undecided		
0008007	Client 0008007	£57.14	£0.00	£72.40		<input checked="" type="checkbox"/> Yes	Happy to go ahead with work if all a...	No
00080081	Client 00080081	£114.29	£0.00	£0.00		<input type="checkbox"/> Undecided		
0008010	Client 0008010	£57.14	£0.00	£158.75		<input type="checkbox"/> Undecided		
0008011	Client 0008011	£57.14	£0.00	£-176.74		<input type="checkbox"/> Undecided		

CREATING A JOB FROM A PROPOSED WORK

Once you have received all votes you can raise a job from the **Create Job** icon on the **General** tab in the proposed works window, and invoice your clients for the costs as you normally would.

You could also return to the **General** tab and edit the **Proposed Work Type** field to **Normal**.



Proposed Work Type

Voting Only

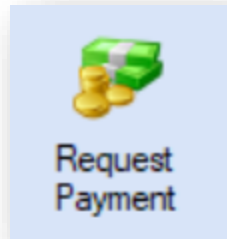
-SELECT-

Normal

Voting Only

view job

After clicking to **Save** this you will get the option to **Request Payment** you can then proceed with the normal proposed work as previously in this guide.



If you are using the client portal your clients will be able to go on and submit payment as previously in the proposed work tab.

Alternatively, after receiving your votes you could proceed to cancel the proposed works.

POSTING AN INVOICE FOR THE PROPOSED WORKS JOB

When you receive the invoice for your job, post this as you normally would in CPL.

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@cplsoftwareltd148.zohodesk.com or through our portal at <https://contact.cplsoftware.com/portal/home> or calling us on 0345 646 0240 (option 1).