

## HELPSHEET – WORKING WITH GREEN FEES

### INTRODUCTION AND SET-UP

As postage costs increase, Green Fees are a more flexible option than Paper Fees which you might want to consider to encourage your clients to go paperless.

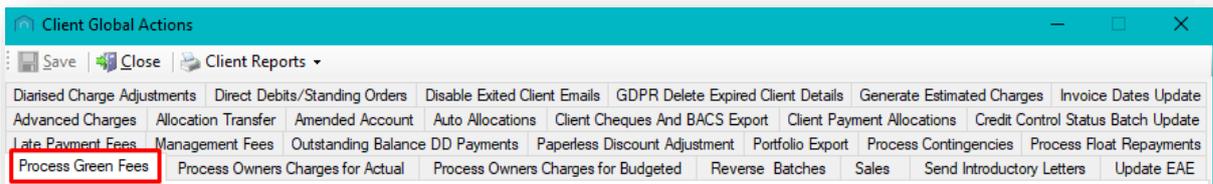
You will need to contact us at CPL Support to speak about us setting up your system to make use of Green Fees. Once this set-up has been completed in your system with default green fees set against all appropriate Unit Types, this will have updated all clients in properties of those Unit Types.

We will ask you to make decisions on the charge description to appear on your client invoices, whether you wish VAT to be applied to these fees, which nominal you wish Green Fees to output to and whether you would like to run it for new owners or whether you would like to give them a grace period without the fee until after they have received their first invoice.

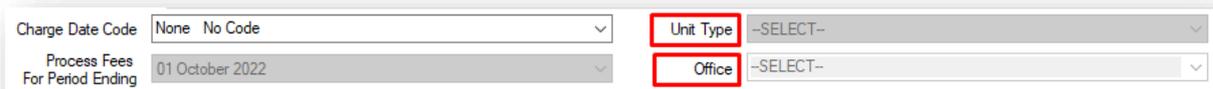
### PROCESSING GREEN FEES

When you process Green Fees, all clients who do not have an email address entered on their account, which is not ticked both **For Documents** and **For Invoice** will receive a Green Fee charge. If clients have these ticked but also have the **Always Print Invoices** option ticked on the account, they will also receive the charge.

Green Fees are processed much like you would process Management Fees in the **Client Global Actions** menu on the **Process Green Fees** tab. Normally you would process these before you run your client invoices for a specific charge period to allow the Green Fees charge to be able to be picked up by the invoice process.



Green Fees can be processed for different charge date periods. There are also filters for **Office** and **Unit Type** which would allow you to process them in smaller batches if you wished.



To get started, select a **Charge Date Code** to process and then select the correct **Process Fees For Period Ending** for the charge date period you have selected.

Process Green Fees	Process Owners Charges for Actual	Process Owners Charges for Budgeted	Reverse Batches	Sales	Send Introductory Letters	Update EAE
Charge Date Code	QTR Quarterly Based On Calendar Year		Unit Type	--SELECT--		
Process Fees For Period Ending	01 October 2022		Office	--SELECT--		
Developments	All <input checked="" type="radio"/>	Range <input type="radio"/>				

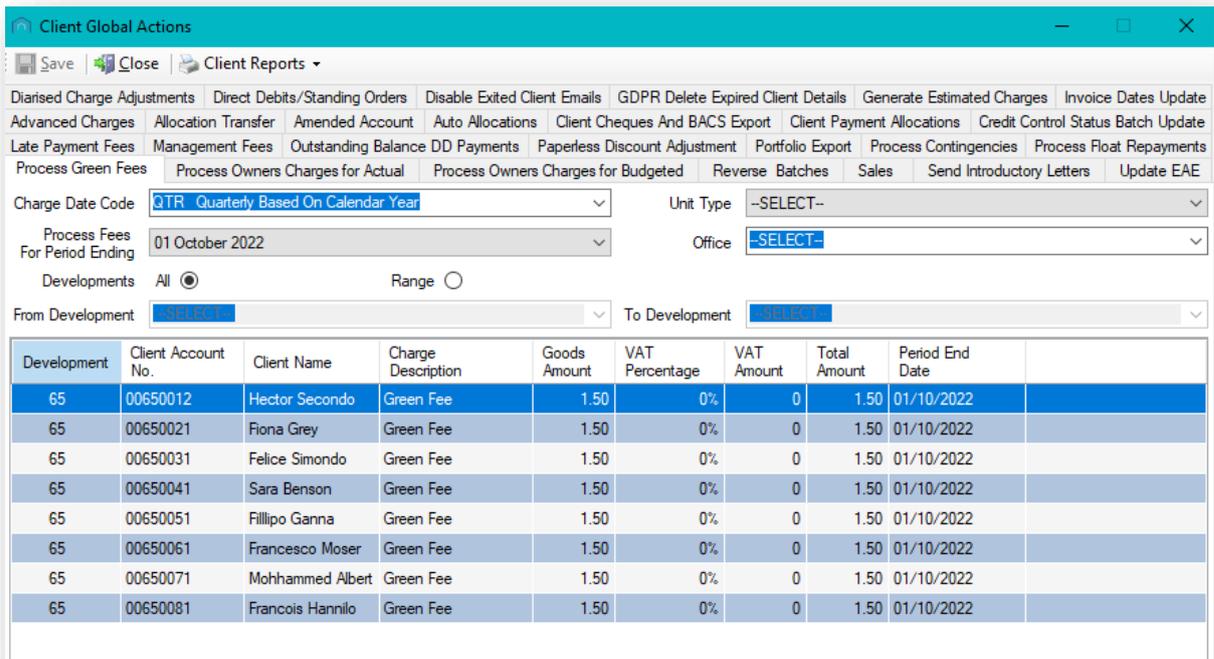
Select to process for **All** developments, or choose the **Range** radio button and select a single development or consecutive range of developments.

Charge Date Code	QTR Quarterly Based On Calendar Year		Unit Type	--SELECT--		
Process Fees For Period Ending	01 October 2022		Office	--SELECT--		
Developments	All <input type="radio"/>	Range <input checked="" type="radio"/>				
From Development	0008 Balmedie Heights		To Development	0008 Balmedie Heights		

Once you have made the relevant selections for your purpose, click on the **Refresh Prelist** button at the bottom-right corner of the window to view what you are about to process.



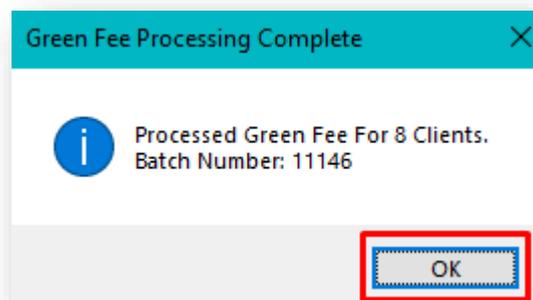
The screen will refresh to display the list of clients in the grid who are about to receive the charge when this is processed. You can export this list if you need to save it outside of CPL by right-clicking in the grid and choosing **Export**.



If you are happy with the clients listed in the Prelist, click on the **Process Fees** button in the bottom-right of the window to process these out to the relevant client accounts.



Once the process is completed, you will receive confirmation of this informing you of how many clients have received a charge and the batch number for the process. Clicking on **OK** will dismiss the confirmation.



If you check one of the client accounts on the **Charge Transactions** tab, you will note that the Green Fee appears there as a charge waiting to be invoiced.

Activity		Diarsed Charges			Web Portal Tracking			Invoice		
Account	Addresses Activity	Transaction Activity	Float Transactions	Charge Transaction	Credit Control	Memos	Letters Documents	Allocations	Maps/Directions	Estimate
Charge Transaction Information										
Trans Date	Batch/DBN	Description	PL Account	Amount	Invoice					
01/10/2022	11146/28338650	Green Fee		1.50						
23/08/2022	11116/28338649	Bin Store Door Repair	HandyMan 101	230.00						
23/08/2022	11116/28338648	Ground Floor Hall Stain Removed	Carpet Cleaning 101	350.00						
01/04/2022	10908/28336239	Management Fee SJC Test		0.33						

## ADJUSTING A GREEN FEE FOR AN INDIVIDUAL CLIENT

Clients who qualify for the fee will have the appropriate fee applied to their account by default based on the Unit Type for their property. You will see that this is listed on the **Properties** tab in the development and on the **Account** tab in the Client Account.

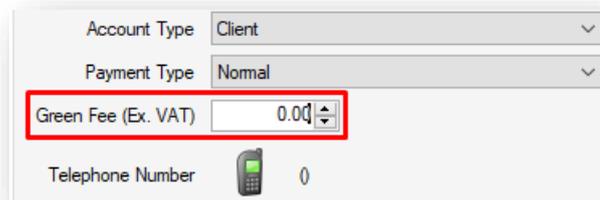
Master										
Blocks										
Properties										
Apportionments										
Diarsed Charges										
Jobs										
Insurance										
Documents										
Check List										
Keys										
Approved Contractors										
Contacts										
Warranties/Maintenance										
Property Information										
Block --SELECT--										
Property	Client Name	Insured for Apportion	Float	EAE	Fee	Green Fee	Sum Insured			
001	00650012 Hector Secondo	<input type="checkbox"/>	180.00	0.00	100.00	1.50	0.00			
002	00650021 Fiona Grey	<input type="checkbox"/>	180.00	0.00	100.00	1.50	0.00			
003	00650031 Felice Simondo	<input type="checkbox"/>	180.00	0.00	100.00	1.50	0.00			
004	00650041 Sara Benson	<input type="checkbox"/>	180.00	0.00	100.00	1.50	0.00			
005	00650051 Fillipo Ganna	<input type="checkbox"/>	180.00	0.00	100.00	1.50	0.00			
006	00650061 Francesco Moser	<input type="checkbox"/>	180.00	0.00	100.00	1.50	0.00			
007	00650071 Mohammed Albert	<input type="checkbox"/>	180.00	0.00	100.00	1.50	0.00			
008	00650081 Francois Hannilo	<input type="checkbox"/>	180.00	0.00	100.00	1.50	0.00			

Activity		Dia	
Account	Addresses Activity	Transaction Activity	Float Transaction
Client Account Information			
Account Number	00650012		
Client Name	Hector Secondo		
Colloquial Name	Mr Secondo		
Client Category	None		
Account Type	Client		
Payment Type	Normal		
Green Fee (Ex. VAT)	1.50		
Telephone Number	0		

You will not find it listed on the Property itself.

Although the Unit Type default Green Fee has been applied to an individual client account, there may be a circumstance in which you wish this client to pay a reduced fee or not to pay a fee at all.

To adjust the default fee, access the Client Account and on the **Account** tab, you can edit the amount in the **Green Fee** field. Don't forget to click to **Save** the account if you make any changes.



The screenshot shows a form with the following fields:

- Account Type: Client (dropdown menu)
- Payment Type: Normal (dropdown menu)
- Green Fee (Ex. VAT): 0.00 (text input field with a red border and a small up/down arrow icon)
- Telephone Number: 0 (text input field with a mobile phone icon)

In the client account above, the fee has been adjusted to be £0.00. Although this client may normally qualify to receive a Green Fee, they won't receive a charge when the green fees are processed. If you had reduced their fee to a lower amount, then they will receive a fee for this reduced amount when you process the Green Fees.

It is worth noting that, when a property sale is processed and a new client is registered to the property, the system will apply the default Green Fee based on the Unit Type to the new client and you will not have to remember to come back and adjust this manually.