HELPSHEET – CUSTOM DESKTOP

The Custom Desktop gives you additional functionality to organise information from various parts of the system. Historically, before the Dashboard was created, this allowed you to follow-up on newly released aspects of the system through simple reporting and some of the functionality available here is superseded by Dashboard cards which have been created.

It is accessed from the main **Custom Desktop** tab in CPL.

The tab is comprised of widgets which can be added to the screen covering functionality on the following areas:

- Keys – this can show you a list of keys which are due to come back in based on information added to the **Keys** tab of individual developments
- Warranties – there is a widget which will allow you to display a list of warranties due to expire. It pulls information from the expiry dates set on warranties across your development portfolio. You can filter by individual property managers/inspectors and job types set against the warranties/maintenance contracts.
- Reminders – these can be created and assigned against various users within your system. You can choose to set a reminder for yourself or another user related to a module within CPL. The widget can then be used to report on which reminders are due for individual users or across all users.
- Web Users – this widget will allow you to authorise and update client web user accounts depending on the set-up for client registration on your Client Web Portal.
- Client Debt Control – this widget would allow you to run lists of clients for whom a Debt Inhibition has been entered on their account with information on when this is due to expire.
- Contractor Insurance Expiry – this will allow you to view a report on which contractors don't have updated insurance recorded on their PL Account. This has really been replaced by the Contractors Dashboard card which gives more detail.
- Development News – This enables you to send out Development News posts (and have this appear on your client portal) across multiple developments, rather than the Development News tab in each development which only allows send out for that individual development.
- Credit Control Review Dates - this widget would allow you to run lists of clients where you had placed them on a client credit control status with a review date.
- Incoming Scanned Mail – this widget was created for people who use the QR Code scan system for scanning, saving and uploading documents.
- Inspections – this will let you see which Inspections are due to be made across developments. It will function from an inspection frequency having been added to the field in the Development Master screen and from when an inspection report was uploaded in the Development Inspections tab, with the inspection marked as completed.

HOW TO ADD A WIDGET

Click on **Add Widget** button in the top-right corner of the Custom Desktop tab.

This will display the list of widgets that you can add to your screen.

Widget Name	Active
Keys	☐
Warranties	☐
Reminders	☐
WebUsers	☐
Client Debt Control	☐
Contractor Insurance Expiry	☐
Development News	☐
Credit Control Review Dates	☐
Incoming Scanned Mail	☐
Inspections	☐

Save   Cancel

Tick to select a widget and click **Save**.

The widget will you selected will now be added to the Custom Desktop screen.

The white arrow in the grey box in the middle of each widget will enable you to access the **Settings** for each widget.
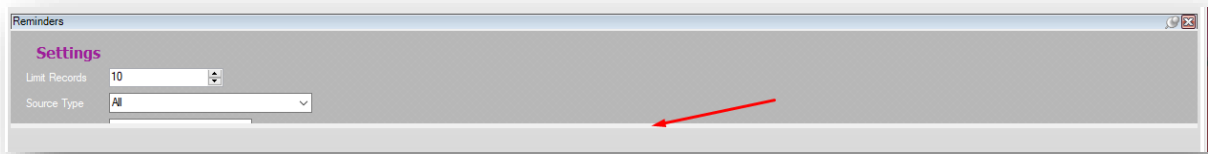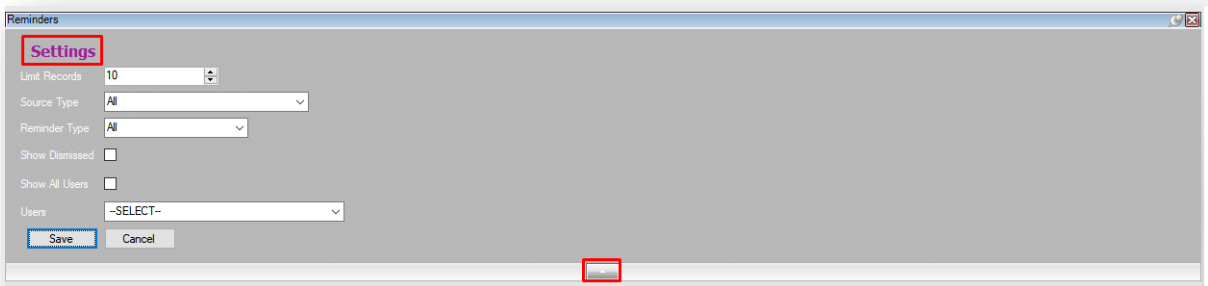
You have to click on the blue title bars (or the grey bottom bar) to drag areas of the widget down to be able to view it on the screen.

Once you have configured the widget, you can click on the white arrow in the grey box to close the **Settings** section.

You may need to drag the grey bar at the bottom of the widget area to view the information for the widget itself. The functionality itself will be different for each widget.
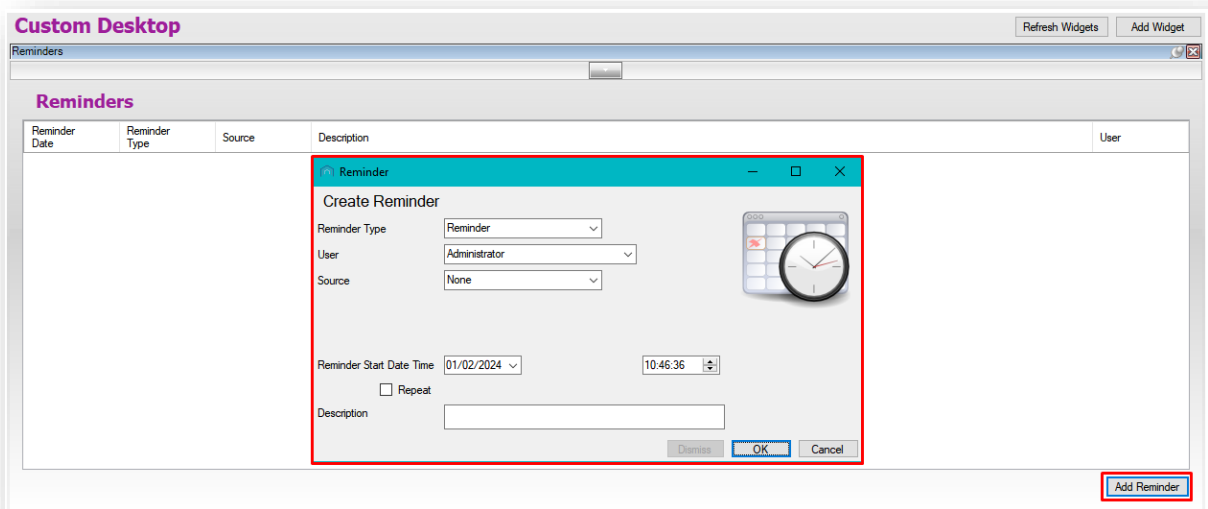

In the Reminders widget, there is a button to add a reminder and any reminders added will then be displayed in the grid above.

Each widget you add will appear as a separate bordered section on your Custom Desktop.

If you click on the blue header bar for a widget and then begin to move it, cross-hairs will appear which will enable you to position widgets onto different parts of the screen and then the tab will remember your selection and keep them there unless you close or re-position them.
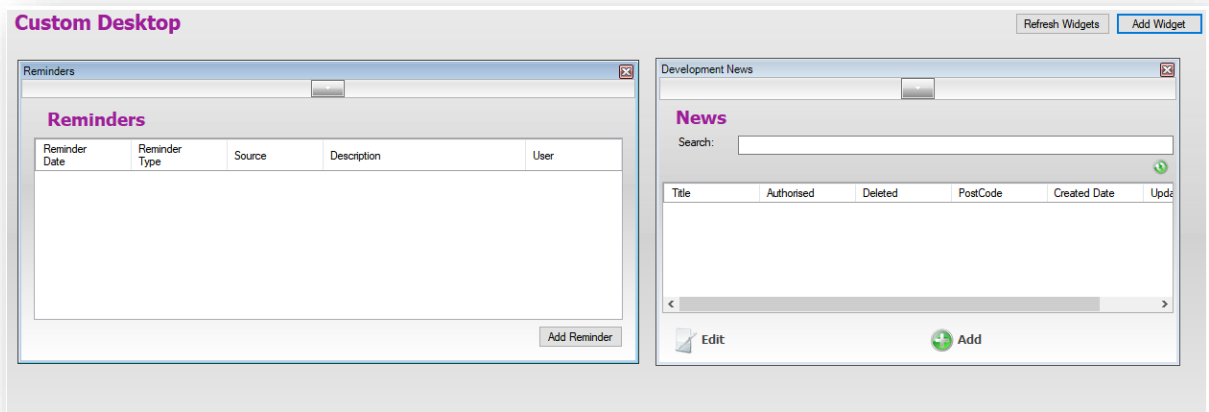
All widgets should automatically refresh themselves on the Custom Desktop tab when you open it but you can click the **Refresh** Widgets button at the top-right if you've had the page open for a while.
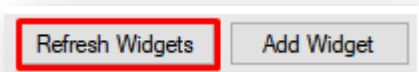
To close a widget, click on the cross in the top-right. You can use the **Add Widget** menu to add a widget at any point back to the Custom Desktop screen.
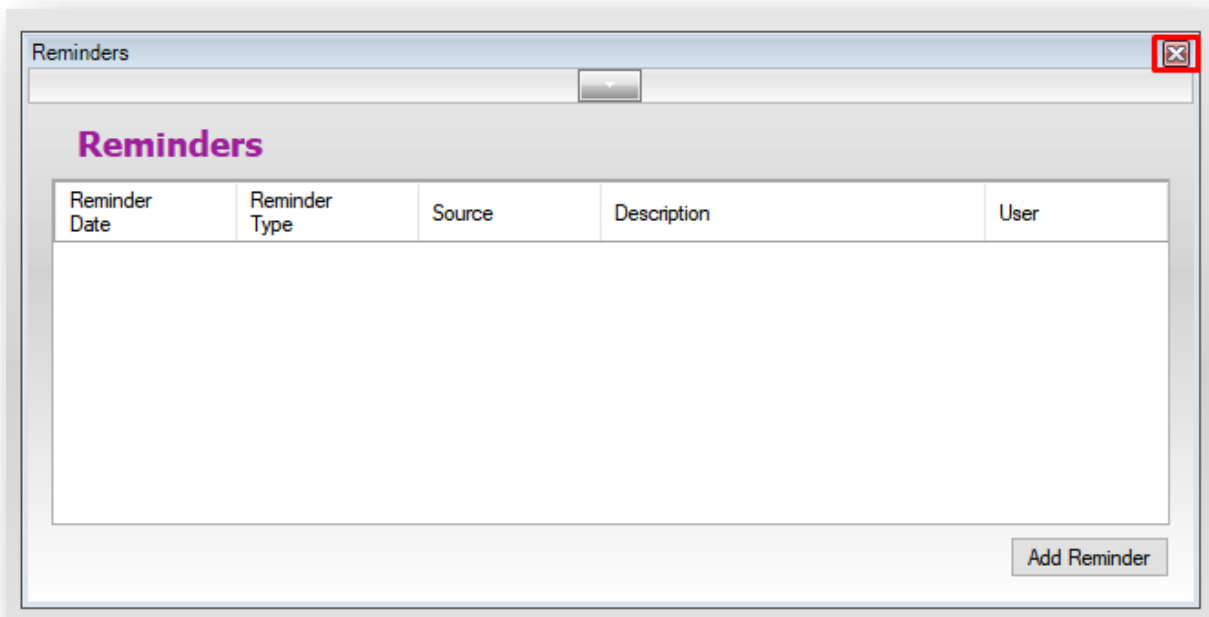
The CPL Knowledge Base will be continually updated with additional guides and information. If you have any questions or suggestions for further guides we'd be happy to hear from you. You can contact CPL Support by emailing us at support@cplsoftware.com or through our portal at https://contact.cplsoftware.com/portal/home or calling us on 0345 646 0240 (option 1).