

CFP Software Ltd

CFPwinMan^{sdb}

Version 4.7.1.5

Any changes since the initial release of version 4.7
will be available at the foot of this document.

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Introduction

CFPwinMan Version 4.7.1.4 onwards now offers:

- Consent management for contractors and guarantors.
- Linked files display option.
- Preference Centre on tenancy.

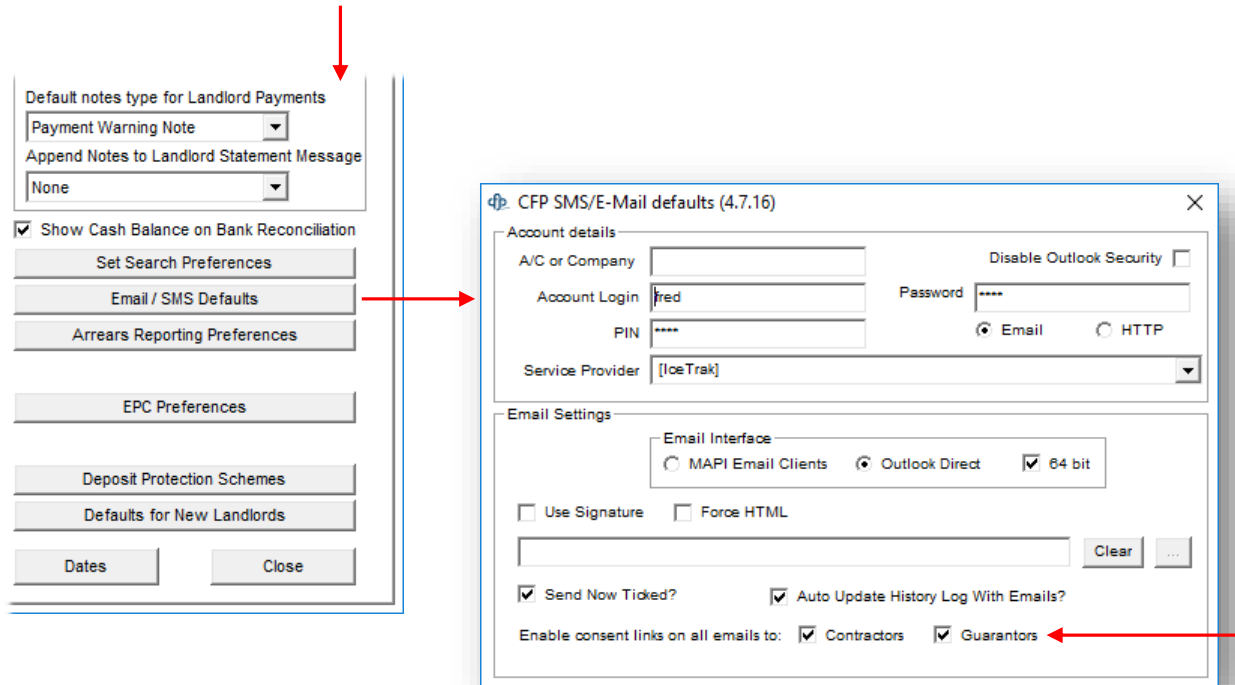
CFPwinMan Version 4.7.1.5 onwards now offers:

- Agency as default Billing Name and Contact for Access on Works Orders.
- Custom Report Generator updates.
- Broadband switching for MoveIt.
- Disable prompt to adjust Letting Fee on tenancy save.
- Warn of EPC rating below 39 when creating tenancy.
- Blocks and warnings for Anonymised Contacts (GDPR)

Improvements in CFPwinMan version 4.7.1.4

Consent Management for Contractors and Guarantors

Users of CFPwinMan can now remove consent preference links from contractor and guarantor correspondence. Go to: **User Defaults -> Preferences -> General** and select **Email / SMS Defaults**.



The screenshot shows the 'User Defaults' preferences window. A red arrow points to the 'Email / SMS Defaults' button. The dialog box 'CFP SMS/E-Mail defaults (4.7.16)' is open, showing account details and email settings. A red arrow points to the 'Enable consent links on all emails to:' section, where both 'Contractors' and 'Guarantors' are currently checked.

Account details:

- A/C or Company: []
- Account Login: [fred]
- PIN: [****]
- Service Provider: [IceTrak]
- Password: [****]
- Disable Outlook Security:
- Email Interface: Email HTTP

Email Settings:

- Email Interface: MAPI Email Clients Outlook Direct 64 bit
- Use Signature: Force HTML:
- Send Now Ticked?: Auto Update History Log With Emails?:
- Enable consent links on all emails to: Contractors Guarantors

To remove consent links from contractors and/or guarantors simply untick the respective option(s).

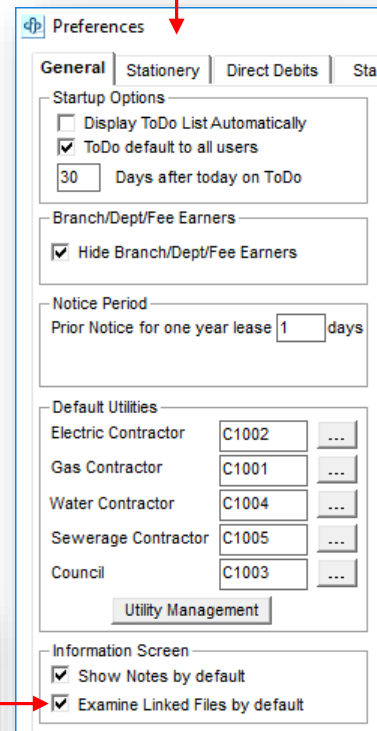
Examine Linked Files by default

CFPwinMan 4.7.1.4 now includes an option to qualify documents listed on Links tabs by default. This restores functionality to that of CFPwinMan version 4.7.0.6.

To change this option go to: **User Defaults -> Preferences.**

Select **Examine Linked Files by default.**

When enabled, all files listed on Links tabs are qualified when the tab is displayed. This means all file information (modified date / type / size / created date) is available instantly for located files - coloured blue - without further interaction from the user. You can sort the list of files by simply clicking on any heading. Files that cannot be located are displayed in red.



Preferences

General | Stationery | Direct Debits | Sta

Startup Options

Display ToDo List Automatically

ToDo default to all users

30 Days after today on ToDo

Branch/Dept/Fee Earners

Hide Branch/Dept/Fee Earners

Notice Period

Prior Notice for one year lease 1 days

Default Utilities

Electric Contractor C1002 ...

Gas Contractor C1001 ...

Water Contractor C1004 ...

Sewerage Contractor C1005 ...

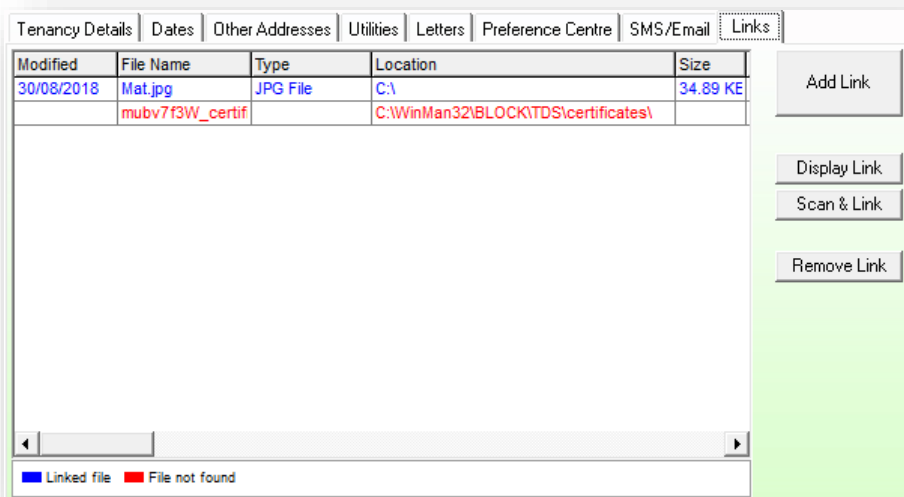
Council C1003 ...

Utility Management

Information Screen

Show Notes by default

Examine Linked Files by default



Tenancy Details | Dates | Other Addresses | Utilities | Letters | Preference Centre | SMS/Email | Links

Modified	File Name	Type	Location	Size
30/08/2018	Mat.jpg	JPG File	C:\	34.89 KE
	mubv7f3W_certif		C:\WinMan32\BLOCK\TDS\certificates\	

Add Link

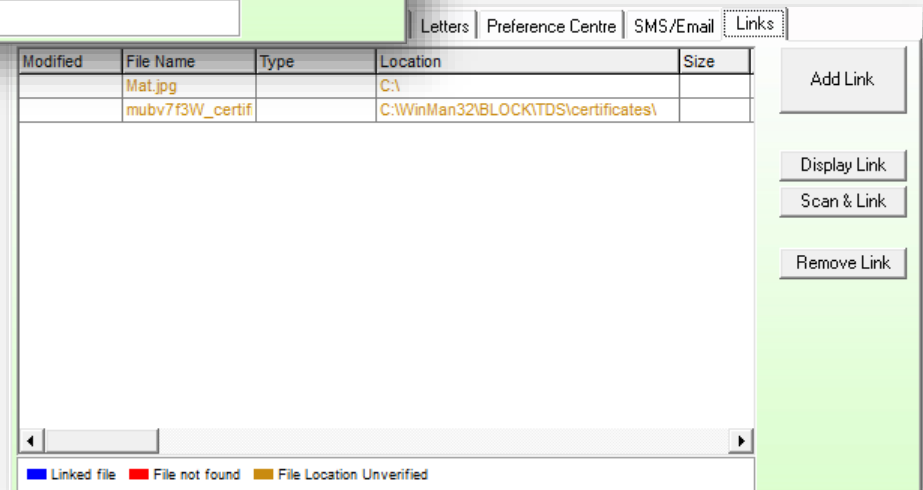
Display Link

Scan & Link

Remove Link

Linked file File not found

When the option is disabled all links are amber until the file is accessed, at which time they are examined as → above. This speeds up display of the Links tab for users with slow drives / networks / servers.



Letters | Preference Centre | SMS/Email | Links

Modified	File Name	Type	Location	Size
	Mat.jpg		C:\	
	mubv7f3W_certif		C:\WinMan32\BLOCK\TDS\certificates\	

Add Link

Display Link

Scan & Link

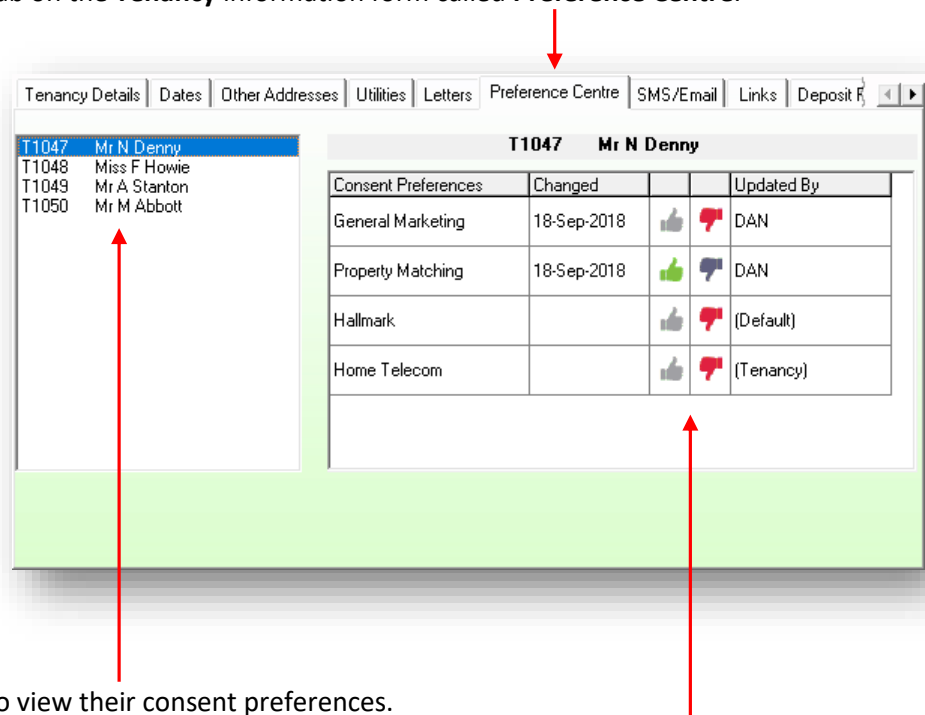
Remove Link

Linked file File not found File Location Unverified

Preference Centre on Tenancy

Users will notice a new tab on the **Tenancy** information form called **Preference Centre**.

Tenancy Preference Centre displays the contact preferences of each Tenant attached to the Tenancy.



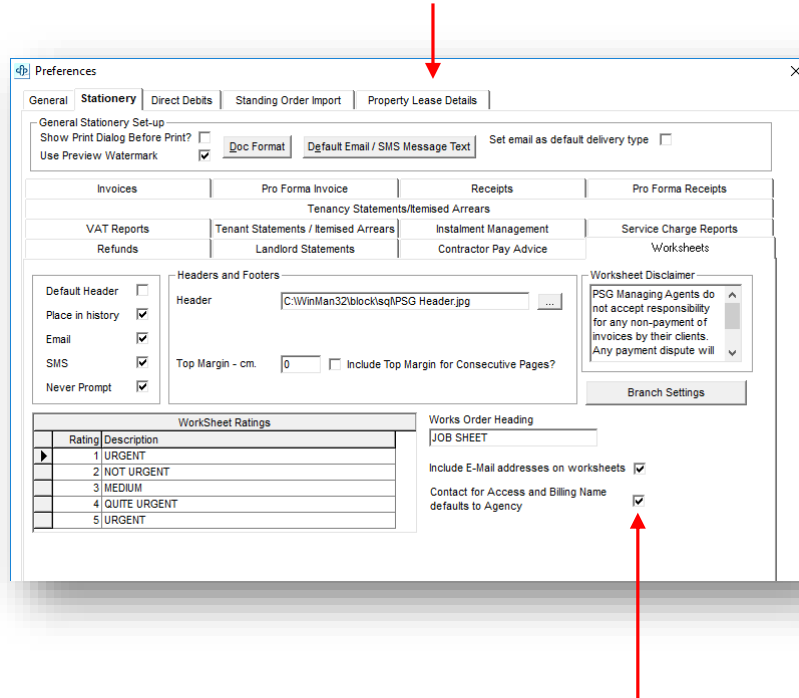
- Select a tenant to view their consent preferences.
- You can then edit the tenant's preferences which will be saved to the individual Tenant record.

Improvements in CFPwinMan version 4.7.1.5

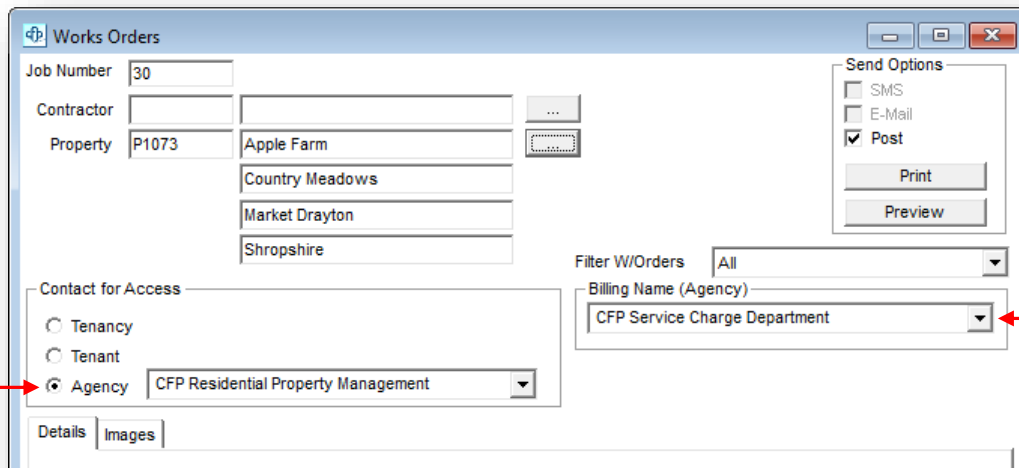
Agency as default Billing Name and Contact for Access on Works Orders

Users can now set **Agency** as the default **Billing Name** and **Contact for Access** on new **Works Orders**.

To set this option go to **User Defaults -> Preferences -> Stationery -> Worksheets**.



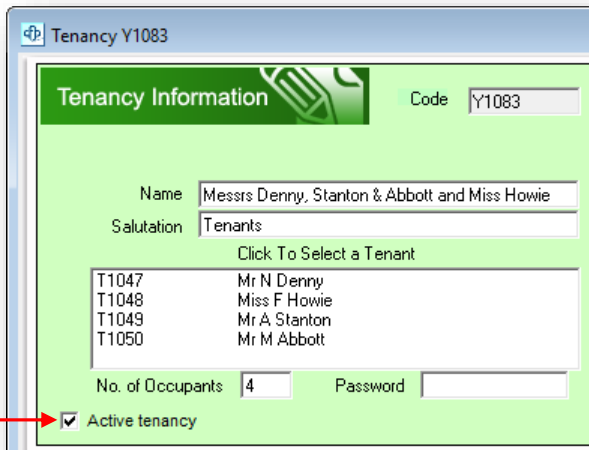
Select **Contact for Access and Billing Name defaults to Agency**.



Both **Contact for Access** and **Billing Name** will then default to **Agency** for all newly created Works Orders.

Custom Report Generator updates

The **Active tenancy** tick box is now reportable in the CFPwinMan **Custom Report Generator**.



Tenancy Information Code Y1083

Name Messrs Denny, Stanton & Abbott and Miss Howie

Salutation Tenants

Click To Select a Tenant

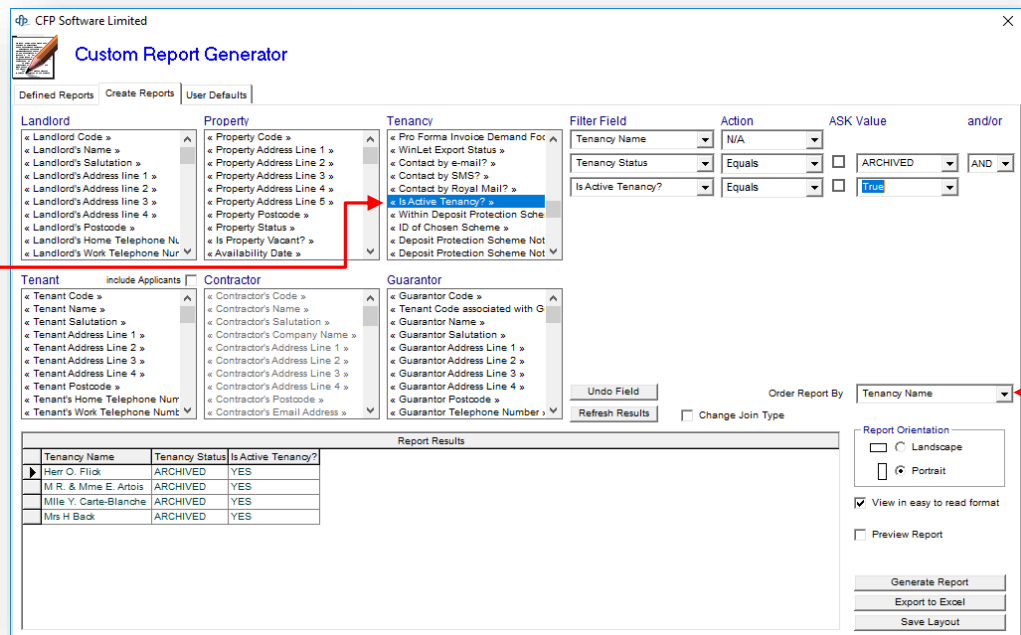
T1047	Mr N Denny
T1048	Miss F Howie
T1049	Mr A Stanton
T1050	Mr M Abbott

No. of Occupants 4 Password

Active tenancy

To access the Custom Report Generator go to **Reporting -> General -> Custom -> Finished**.

Is Active Tenancy? is listed in on the **Create Reports** tab.



CFP Software Limited Custom Report Generator

Defined Reports Create Reports User Defaults

Filter Field	Action	ASK Value	and/or
Tenancy Name	N/A		
Tenancy Status	Equals	<input type="checkbox"/> ARCHIVED	AND
Is Active Tenancy?	Equals	<input type="checkbox"/> True	

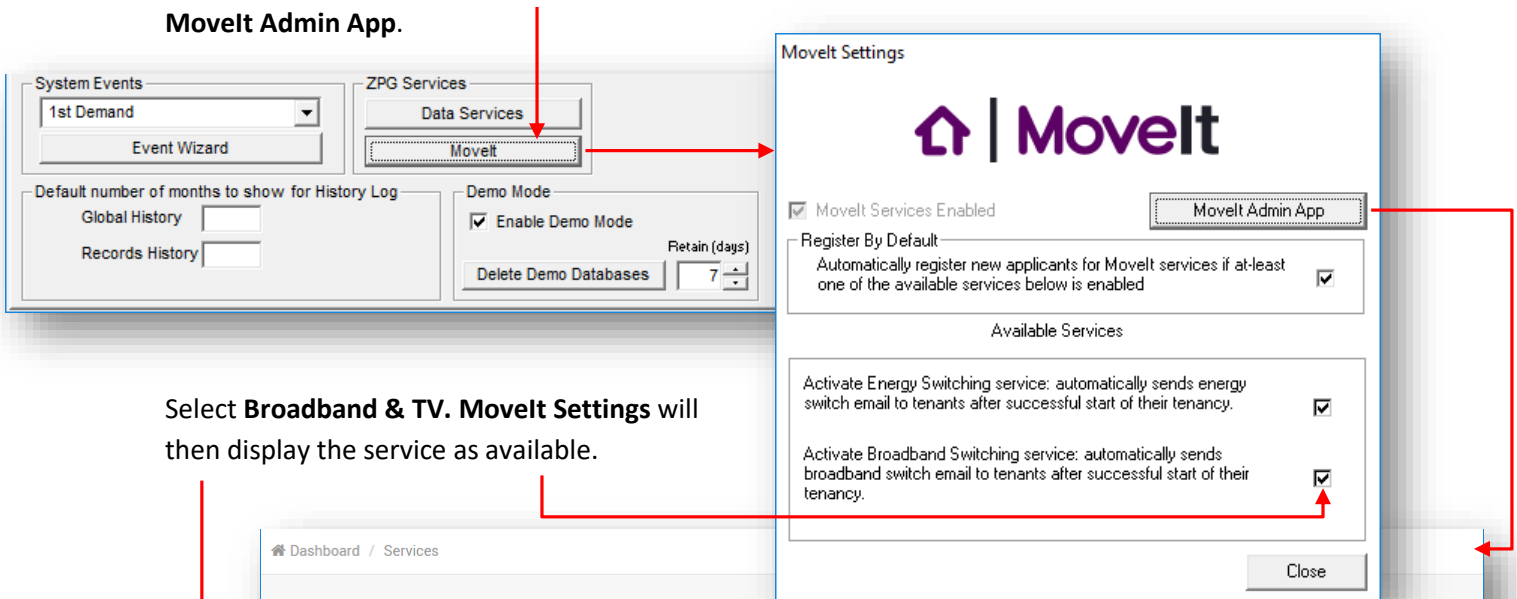
Report Results

Tenancy Name	Tenancy Status	Is Active Tenancy?
Herr O. Flick	ARCHIVED	YES
M R. & Mme E. Artois	ARCHIVED	YES
Mlle Y. Carte-Blanche	ARCHIVED	YES
Mrs H Back	ARCHIVED	YES

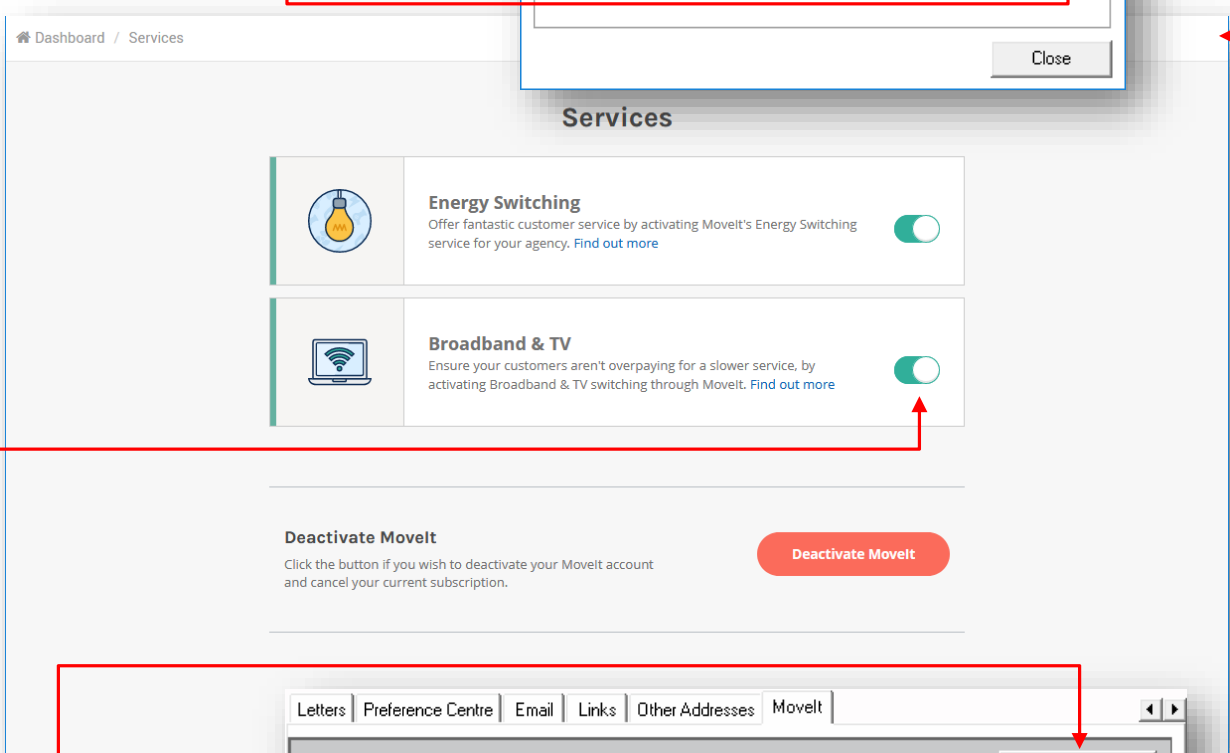
Users can now also choose in which order they wish the report. Select a field in **Order Report By**.

Broadband & TV switching for MoveIt

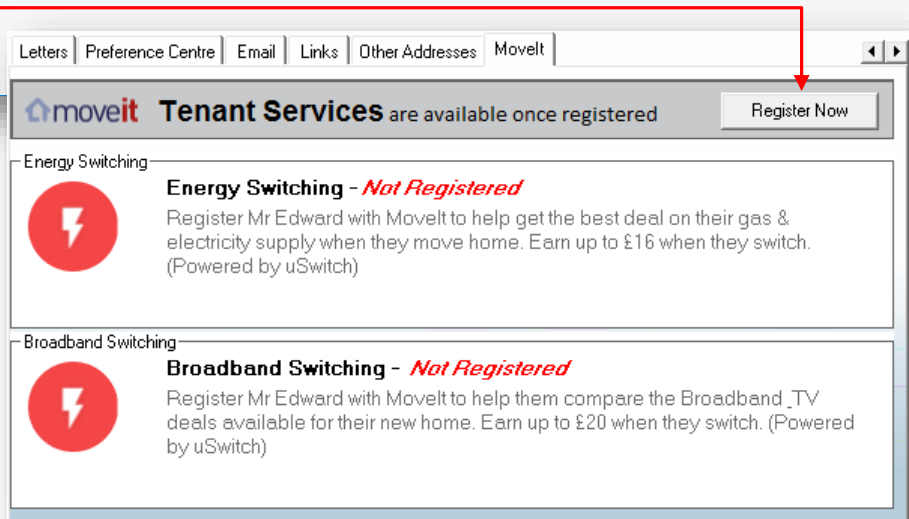
MoveIt now includes a switching service for Broadband & TV! To enable it go to **User Defaults -> MoveIt -> MoveIt Admin App**.



Select **Broadband & TV**. **MoveIt Settings** will then display the service as available.



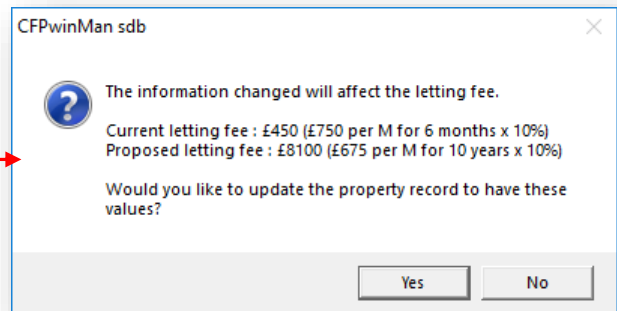
You can **Register** each Tenant for MoveIt services via the **Tenant Information -> MoveIt** tab.



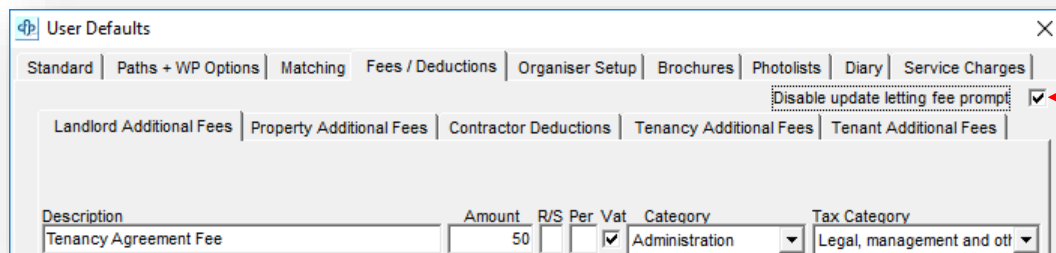
Disable prompt to adjust Letting Fee

Users are now able to suppress the message prompting them to update the **Property Letting Fee** when saving changes to a Tenancy record.

Currently when changes are saved to a Tenancy record the user is prompted if the **Period** and **Rent Per Month** calculation does not match the **Letting Fee** listed on the associated **Property** record.

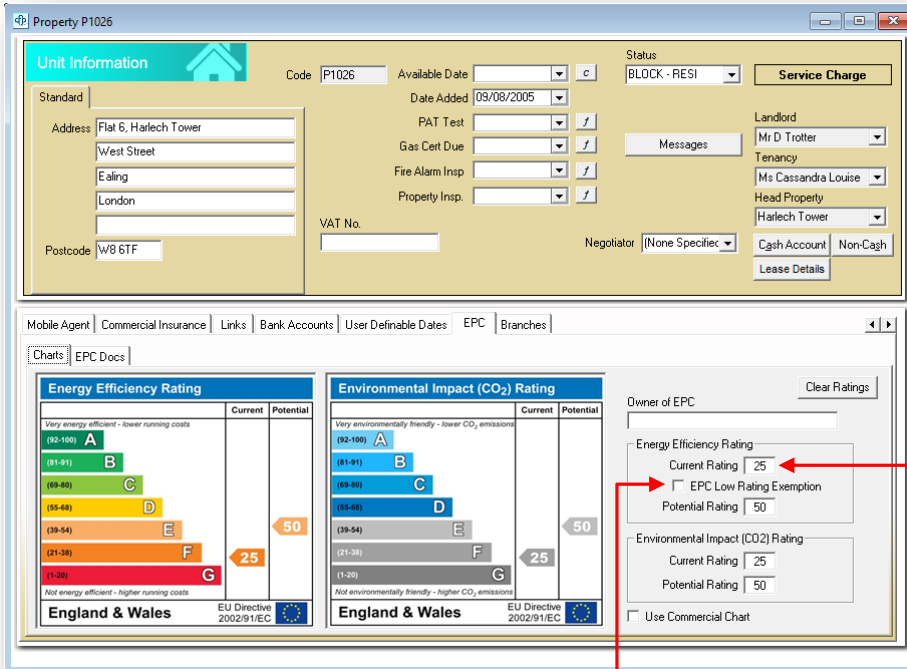


This prompt can be removed by going to **User Defaults -> Fees / Deductions** and ticking **Disable update letting fee prompt**.



EPC ratings below 39

CFPwinMan version 4.7.1.5 provides functionality to warn users when creating a tenancy against properties with an EPC rating below 39 (category E), and provides reports to locate those properties.

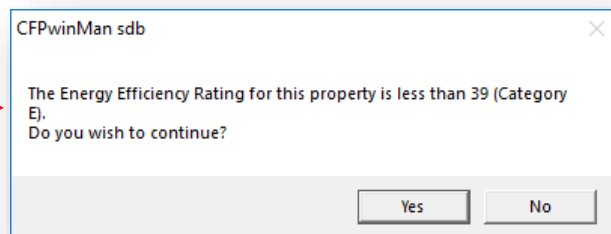


The screenshot shows the 'Property P1026' information screen. The 'EPC' tab is selected, displaying two rating charts: 'Energy Efficiency Rating' and 'Environmental Impact (CO₂) Rating'. Both charts show a 'Current' rating of 25 (Category E) and a 'Potential' rating of 50 (Category B). A red arrow points from the 'Current Rating' field in the 'Energy Efficiency Rating' section to the text on the right.

The **Current Rating** is listed on the **Property** information screen **EPC** tab.

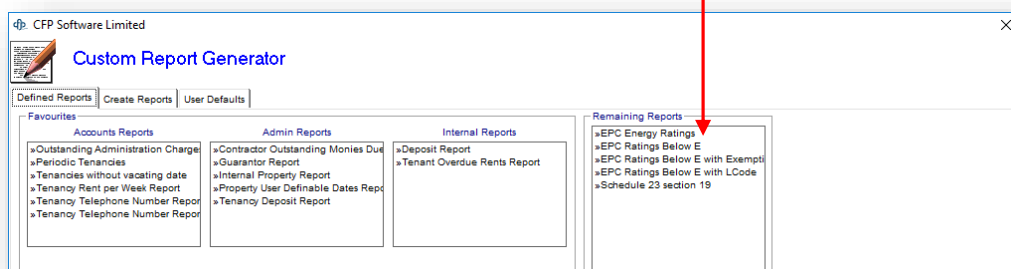
If you wish to suppress the warning when creating tenancies against properties with a rating less than 39 you can do so by selecting **EPC Low Rating Exemption**. This will also remove the property from the reports below.

Left unselected, when creating a tenancy against this property you will receive a prompt.



The dialog box contains the following text: "The Energy Efficiency Rating for this property is less than 39 (Category E). Do you wish to continue?" Below the text are two buttons: "Yes" and "No".

New reports to list properties with low ratings are available via **Reporting -> General -> Custom -> Finished**.



The 'Custom Report Generator' window shows a list of reports under the 'Remaining Reports' section. The reports listed are: "EPC Energy Ratings", "EPC Ratings Below E", "EPC Ratings Below E with Exempt", "EPC Ratings Below E with LCode", and "Schedule 23 section 19". A red arrow points from the text above to this section.

GDPR – Blocks and Warnings for Anonymised Records

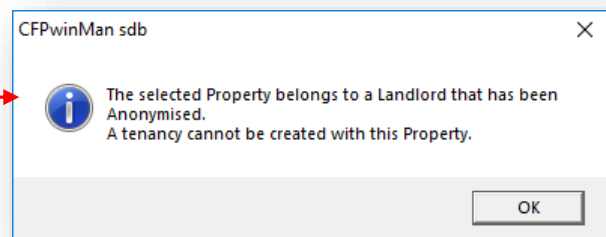
Following on from the anonymisation facilities introduced earlier this year to comply with GDPR guidelines, we have now introduced further steps in CFPwinMan to stop those records from being used elsewhere in the program.

It should be noted that users are already notified when setting a contacts record to Archived and the balance is not zero, so this should be heeded. Records anonymised for at least 7 days cannot be un-anonymised and therefore accounts cannot be corrected past this time if the warning is ignored.

Additionally, the following will occur for anonymised records:

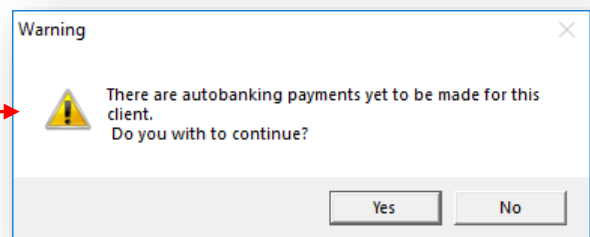
- Creation of tenancy records against properties whose landlords have been anonymised.

You will be advised this process is blocked:



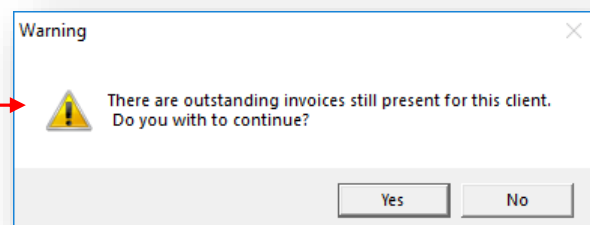
- Anonymise contacts with pending auto banking payments.

You will be warned of pending payment(s). We recommend you process these via Miscellaneous -> Print Auto Banking Report before anonymising the record.



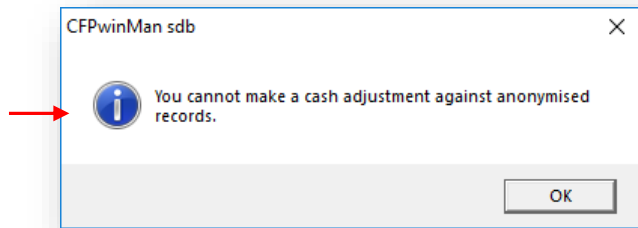
- Anonymise contacts with outstanding invoices.

You will be warned of outstanding invoices. We recommend you receipt or credit note these before anonymising the record.



- Adjust cash against anonymised records

You will be advised this process is blocked:



- Process Direct Debits or Standing Order against anonymised contacts.

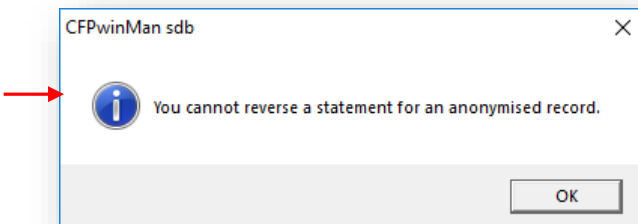
The lists will no longer be populated with these records.

- Use Multiple Invoicing against anonymised contacts.

Anonymised records will no longer be populated when accessing Postings -> Multiple Invoicing.

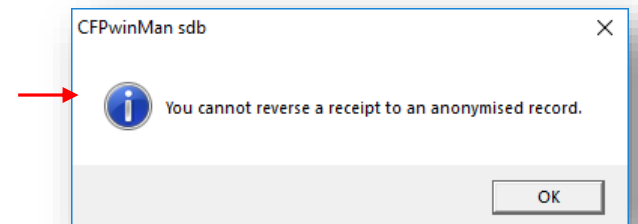
- Reverse statements against anonymised contacts.

You will be advised this process is blocked:



- Reverse receipts against anonymised contacts.

You will be advised this process is blocked:



- Transmit messages to anonymised contacts.

Anonymised records will no longer be populated when going to Miscellaneous -> Transmit Messages.