CFP Software Ltd

CFPwinMan^{sdb}

Version 4.7.1.8



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Introduction

CFPwinMan Version 4.7.1.8 onwards now offers:

- 2101+ Dates on Custom Reports and History Log.
- Custom Report for Consent Preferences.
- Making Tax Digital Export for Fees.
- Statement filename for Landlord.
- Ad Hoc Bullet Points.
- Tenant Fees Act 2019: Clear all Fees buttons.
- Tenant Fees Act 2019: Deposit Warnings.
- Tenant Fees Act 2019: Renewals Report.
- Tenant Fees Act 2019: Start and Renewal on Organiser Arrears.
- User deactivation warnings.



Improvements in CFPwinMan version 4.7.1.8



2101+ Dates

CFPwinMan now accepts dates past 31st December 2100 on both the **Custom Report Generator** and **History Log**.

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Clear All Fees buttons

New buttons easily remove all default fees for new tenants and tenancies.

They are found in **Defaults -> User Defaults -> Fees / Deductions -> Tenancy Additional Fees** and **Tenant Additional Fees**.

-v2 Oser						. 1	-		1.			
Standar	d Paths + WP Options	Matching	Fees / Ded	uctions	Organiser Se	etup	Broo	chur	es Ph	otolists Diary S	ervice Cha	irges
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								Th or	is will new	clear all templat tenancies.	ed fees	
										_		
								Ar	e you	sure?		



Fees VAT Exports

New reports are available to export your fees for Making Tax Digital.

Go to **Reporting -> Accounts** then either **VAT (Cash)** or **VAT (Accrual)**.

•			
Image: Date Filter To 17/07/2019 From 17/06/2019 To	Sort Order © Date Order C Ref. Order	Select your Da	ate range.
All Accounts Choose Account Filter by Head Property Filter by Head Property Sector 2 Receipts Cash Adjustments Payments Cash Adjustments Cash Adjustments Payments Cash Adjustments Cash Adjustments Cash Adjustments Cash Adjustments Cash Book Summary Landlord Control a/c NRL Tax a/c Tnt / Tcy Control a/c NRL Tax Income Per Leaseholder Contractor Creditors Report 17/07/2019 Debtors Report Agency Fees Agency Fees Agency Account Landlord Agency Payments Tenancy / Tenant Fees Agency Payments Tenancy / Tenant Fees VAT (Cash) Batch Fees VAT (Accrual) Contractor Report Landlord Unallocated	Period Statements From To ZZZZZZZZ Status Any Period Statement Status Any Period Statement Status Any Period Statement Status Any Period Statement Status Any Status Any Period Statement Expenses report Expenses Report Expenses Report Report Options Group by Item © In Date Order Preferred Method © Pretivew Preferred Method Print C Export © Print C Export © Preview Projected Fees		
Paid Date Payment Ref Branch Client Client Account (Contact Code Contact Name Contact Address Our Ref Prog 23/01/2019 AutoBank CFP Resi 8 The Mail Client L000 Mr P Roberts 23 Green Avenue 6 23/01/2019 AutoBank CFP Resi 8 The Mail Client L1001 Nick Whitney AutoBank P100 23/01/2019 AutoBank CFP Resi 8 The Mail Client L1001 Nick Whitney AutoBank P100 23/01/2019 AutoBank CFP Resi 8 The Mail Client L1001 Nick Whitney AutoBank P100 23/01/2019 AutoBank CFP Resi 8 The Mail Client L1001 Nick Whitney AutoBank P100 23/01/2019 AutoBank CFP Resi 8 The Mail Client L1001 Nick Whitney AutoBank P100 23/01/2019 AutoBank CFP Resi 8 The Mail Client L1001 Nick Whitney AutoBank P100 23/01/2019 AutoBank CFP Resi 8 The Mail Client L1001 Nick Whitney AutoBank P100 23/02/2014 CFP Prop C1010 Mrs Beryl Clark 124 North End Road, 1241 24/06/2014 CFP Prop C1010 Nrs Beryl Clark 124 North	perty Property Address Property Mana Charge to De 57 Shop 6, The Mall COMMERCIAL Landlord 55 Shop 3 and 5, The COMMERCIAL Landlord Ms 54 Shop 2, The Mall COMMERCIAL Landlord Ms 54 Shop 2, The Mall COMMERCIAL Landlord Ms Supplier Commission from Contractor Payment Supplier Commission from Contractor Payment Supplier Commission from Contractor Payment Supplier Commission from Contractor Payment	Nominal Nominal Nom nagement Fees (P1057) Calc. at 12% PLCOM Land nagement Fees (P1055) Calc. at 12% PLCOM Land nagement Fees (P1055) Calc. at 12% PLCOM Land nagement Fees (P1054) Calc. at 12% PLCOM Land Nominal Nominal Code Description Invoice Nu PCCOM Contractor Commission PCCOM Eventractor Commission PCCOM Contractor Commission PCCOM Eventractor Commission PCCOM Contractor Commission PCCOM Eventractor Commission	Innal Code Description Invoice Net VAT Total VAT Rate VAT Rate DAT RaT Rate DAT Rate DAT RaT Rate

- Cash lists all items that have been included in agency payments. •
- Accrual lists all fees raised. •

You may need to create a new mapping in your accounting software to import the file.



Consent Preferences reports

Reports to display your contacts consent preferences are now available.

You can access these via **Reporting -> General -> Custom -> Finished**.

CFP Software Limited Custom Report Create Report User	Generator	·	>
Accounts Reports *Outstanding Administration Charge »Periodic Tenancies > Tenancies without vacating date > Tenancy Rent per Weak Report > Tenancy Telephone Number Repor > Tenancy Telephone Number Repor	Admin Reports «Contractor Outstanding Monies Due «Ouarantor Report »Internal Property Report «Property User Definable Dates Report »Tenancy Deposit Report	Internal Reports »Deposit Report »Tenant Overdue Rents Report	Hemaining Keports > Agency Payments Export for Sage > Consent Preferences - Contractor > Consent Preferences - Landlord > Consent Preferences - Tenant > EPC Ratings Below E > EPC Ratings Below E with Exempti > EPC Ratings Below E with LCode > Schedule 23 section 19 > Tenant Fees Act Renewal Report CP report 07112018044

— Three are available. Select your desired report and then Generate Report.

			Consent F	Preferences	- Tenant			
Code	Name	Status Ge	neral Marketing Prop	erty Matching	Hallmark	Home Telecom	Movelt	
T1001	Mr Hall	COMMERCIAL	Unknown	Unknown	No	No	Yes	
T1002	Mr White	COMMERCIAL	Unknown	Unknown	No	No	Yes	
T1003	Mr Baker	COMMERCIAL	Unknown	Unknown	No	No	Yes	
T1004	Mrs SKurt	COMMERCIAL	Unknown	Unknown		No	No	
T1005	Mr Cutter	COMMERCIAL	Unknown	Unknown		No	No	
T1006	Mr D Edward	PRIVATE	Unknown	Unknown	No	No	No	



Renewal report

Code

Y2041

A **Renewal Report** for the Tenant Fees Act 2019 is now available.

To run it, go to: **Reporting -> General -> Custom -> Finished**.

Accounts Reports Dutstanding Administration Charge: Periodic Tenancies Tenancies without vacating date Tenancy Rent per Week Report Tenancy Telephone Number Repor Tenancy Telephone Number Repor	Admin Reports Contractor Outstanding Monies Due Guarantor Report Internal Property Report Property User Definable Dates Report Tenancy Deposit Report	Internal Reports »Deposit Report »Tenant Overdue Rents Report	»Agency Payments Export for Sage «Consent Preferences - Contractor «Consent Preferences - Landlord «Consent Preferences - Tenant »EPC Charlings Below E »EPC Ratings Below E with Exempti »EPC Ratings Below E with LCode	
			CFP report 071120181044	

Т

The report displays information for tenancies with a **Renewal Date** set in the future and total receipts of **Deposit Held** that are over the Maximum Permitted Deposit (**Threshold**) for each tenancy. This includes funds transferred to the Custodial Deposit Scheme.

Tenant Fees Act Renewal Report

Annual Rent

£5999.76

Threshold

£576.90

Deposit

£750.00

Renewal Date

02 Jul2019

Status

HARLE CH

Name

New Applicant



Ad Hoc Bullet Points

New items for **Bullet Points** have been added to the **Property Information** form.



The Ad Hoc bullet points are free type, so do not require any additional set up in Defaults and can be completely different for each property.

They are listed appropriately on your brochures and property portals.



Organiser Arrears Start and Renewal

Tenancy Start and Renewal dates are now available on Organiser -> Arrears.

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in TDS Uploads Add	tional Da	tes » 16 Direct	Debits								_								
List	5 🖂	ck for ToDo 👻]⊙si	ummary C	Detail														
sheets	8	View	i 🖂									Arrears							
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to calculate		VIEW	- 1	£300.00	80.00	2 1075	Overdue		Y1052	L1003	P1022	Flat 2, Harlech Tower	Head Office	Block Mana	James				01/08/1990
	16	>>>>>		£50.00	£0.00	1 710	Overdue		Y1057	L1003	P1027	Flat 7, Harlech Tower	Head Office	Block Mana	James				31/12/2018
rds to pay/Inc dep.	×	Calculate		£50.00	£805.00	1 557	Overdue			L1023			Head Office	Front Office	AGEN				
ial Transfers Due	2	View		£765.00	80.00	2 526	Overdue		Y2017	L2019	P2018	The Shack	Head Office	Front Office	AGEN				01/01/2018
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																	101000		

As there are quite a few fields in the list, you will probably need to scroll right to see the new columns.



Statement Document on Landlord History Log

To assist in the location of landlord statements, users of CFPwinMan will notice that the statement filename is now available on the History Log.

Go to Landlord and select History Log on the main toolbar.		CFPwinMan sdb (4.7.1.6) - VPC-NW-SQL2014 Data002 File Information Reporting Postings Miscellaneous Defaults Window Help Branch Settings
Landlord Information Code [L2002 Status FREEHOLDER	Go to Landlord and select History Log on the main toolbar.	Intermetion Teporting Formation Teporting Teporting
Properties Name Victor #2		Landlord Information Code L2002 Status FREEHOLDER Home 01209 313121

Scroll right on the grid until the **Document** column is visible, which displays the document filename.

Þ. I	History Log	J								
119	story Log	3								
<u>H</u> is	story Log 🛛 <u>F</u>	iltering/Reports	Add Entry							
	Criteria Type C All C	Landlord C P	roperty O	enancy C T	fenant C Guarantor C	Contractor	Management Co	C Bank Account	Information	View STATEMENT
Г					Showing all records					
	TCODE	GCODE	CCODE	AccountID	Management Company	Documen	t	ID 🔺		
				7		L2002 7 C	02 20190614.PDF	1703		
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Tenant Fees Act 2019 updates

We have made updates to CFPwinMan in version 4.7.1.8 to support the Tenant Fees Act 2019 (the Act). Functionality relating to these changes is controlled by a tick box called **Show Deposit Amount Warning** found in **User Defaults -> Preferences.** This is enabled by default:

General Stationery Direct Debits Sta	nding Order Import Property Lease Details	
Startup Options Display ToDo List Automatically ToDo default to all users Days after today on ToDo Branch/Dept/Fee Earners Hide Branch/Dept/Fee Earners	Data Export Auto Tick for Export PDF Settings C CFPcommercial Export Any V Live import Export Any V New Style Edit Category Maps Choose Import Paths Tenant Referencing	Landlord Statements Display works orders on payment Separate Invoice Use Invoice Up To Date Align 'Inv. Up to Date' to Trans. Up to Date Show Account Known As on Statements Prompt before recalculating multi acc form Distributions
Notice Period Prior Notice for one year lease 1 days	Miscellaneous ☐ Gross Overseas Tax ☐ Calculate rents by default ☑ Always use invoice no	Initial manual contractor involces Display landlord details on each page Number of Statements Shortfall Allocation
Default Utilities Electric Contractor C1002 Gas Contractor C1001 Water Contractor C1004 Sewerage Contractor C1005 Council C1003 Utility Management	Manual Amount for Agency Fee Show Unallocated Money on Invoices Warn if contractor invoice already used Auto calc VAT For unknown contractor Allocate Invoice Number on update Show account known as on contractor statement VAT on all invoice items VAT on expense items Default to Pro Forma Pay contractor bills using brought forward retention Batch direct debt receipts	Allocation Order Allocation Order Fees C Expenses Default multi-landlord payment type Standing Order Default notes type for Landlord Payments Payment Warning Note Append Notes to Landlord Statement Message
Property Area Units	Show Deposit Amount Warning	None
Floor Area O Ft Sq M Sq Land Acres Hectares	Tenancy/Tenant Clearance Period (in days) Description Clearance </td <td>Show Cash Balance on Bank Reconciliation Set Search Preferences</td>	Show Cash Balance on Bank Reconciliation Set Search Preferences
Tenancy Top-Up Scheme	Autobanking 0 Cheque 5 Cash 0	Email / SMS Defaults Arrears Reporting Preferences

Active tenance	cy Me:	ssage all tenants
Tenancy Details	Dates Other Addresses Utilities Letters Preference Centre SMS/Email Lin Daily F	ks Deposit R 🚺 🕨
Tenancy Start Date	07/12/2018 Period M Months 0	Years 5
Current Start Date	07/12/2018 Rent Per Month 3,250.00 Rent Per Week	750.00
First Full Rent Due	01/01/2019 🔽 Deposit Type Deposit Held 🖵 Deposit Reques	ted 6,000.00
Renewal Date	16/05/2019 Periodic Tenancy Maximum Permitted	Deposit: £ 3750.00 🗲
Notice to Quit	06/10/2023 🔽 Calculate Rents 🗖 Deposit Protection Scheme 🔽	Registration No.
Vacating Date	Apportioned Rent The Dispute Service	HrxF4F
Main Payments	Bank Details	
Receipt Type Int	ternet 💽 🏳 Print Receipt Day of Month 1st of each month	
Pa	ayment must be made on or before t 🚽 Pro Forma Type Payment must be made	on or before 💌
Ter	enancy Agreement Name	
Build Name	r David Hill & Mrs Susan Hill Original Invoited Invitial Invoi	ice Complete

Users will notice a label on the **Tenancy Information** screen **Tenancy Details** tab stating **Maximum Permitted Deposit.**

This label updates to the maximum allowed deposit under the Act when either **Rent Per Month** or **Rent Per Week** amounts are changed. This is currently calculated as 5 weeks rent for tenancies under £50,000 per annum or 6 weeks rent for tenancies equal or above £50,000 per annum.

If the amount in **Deposit Requested** is above the maximum permitted the label turns red.



Whenever the tenancy **Renewal Date** is changed the current deposit balance against the tenancy is checked. This can be viewed by selecting **Deposit** on the tenancy information screen and the Custodial Deposit Scheme. If the current deposit balance is higher than the Maximum Permitted Deposit then a warning is displayed:



Selecting **Yes** will keep your change, selecting **No** will return the **Renewal Date** to its previous value.

	Tenancy In	Invoice										
	Landl	Idlord	L1007	Nick Whitney							Send Options -	
	Prope	perty	P1033	28 Orchard Drive				Place	Invoice i		Post	
	Tenar	ancy	Y1064	Mr & Mrs D Hill				Histor	у	V	Update	
				Shared Invo	pice						Preview Invo	ice
a total amount of all						00			00.00		Preview Pro fo	orma
le total amount of all	Inve	nvoice Date	29/05/2019	Trans Up To: 29/05/2019	Referenc	e 28	Invo	ice Numbe	er 2346		Close	
posit Held invoices	Invoice	ivoice Date ice Remark	Payment mu	Trans Up To: 29/05/2019 ist be made on or before the Due d	ate.	e 28	Invo		er 2346 Show A	ccoun	Close t Balance for Tenar	
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e total amount of all eposit Held invoices compared against e current tenancy posit balance.	Pro Forma	nvoice Date ice Remark ma Remark Date 5/2019 [2]	Payment mu Payment mu Payment mu Item Deposit Held	Trans Up To: 29/05/2019 ist be made on or before the Due d ist be made on or before the Due d to add a new ir Description Deposit		go to th /AT Per .00 S - Si	e last i User Pr DAN	OW O Forma	Calc S/U	D D	Close It Balance for Tenar ID 10411	
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Additionally, the same check is made whenever deposit invoices are raised via **Tenancy Information** -> **Invoice**.

Selecting Yes to the prompt will raise your invoice(s), selecting No will leave your invoices unraised.



This also occurs when using **Postings -> Multiple Invoicing**.



Selecting an individual tenant or tenancy will display the same prompt as above, and choosing No will leave Deposit Held invoices unselected but raise everything else as normal.

Selecting the top node will evaluate all tenants/tenancies and list them on the prompt. Again, selecting No will leave deposit held invoices unraised but select the rest.

Maximum	permitted deposit exceeded advisory	\times	
1	In accordance with the Tenant Fees Act 2019 (the Act), and based on the rent amount recorded on the details tab, you should not hold more than the total deposit for these tenancies listed below.		
•	Y1064 : £6000. Y2040 : £14,42 Y2043 : £1153.85 Y2045 : £576.92		
	It is your responsibility to ensure that any payments you receive (as the letting agent) or the landlord receives from the tenant, including the deposit, comply with the provisions set out in the Act.		
	Do you wish to continue?		
	Yes No		



User Deactivation Prompts

Administrators will notice a warning message when deactivating users.

Roles						Users			
Name		Active	Select	▲ Name	Initials	Colour	Role	Position	Email
Admin									
Full Access		\checkmark		Aarran Ellis	AE		Full Access		
Non Accounts Staff				Alex Chewins	AC		Full Access		
Sales		_ <u></u>		Amy Smith	AMY	Light green	Full Access	Sales Manag	
		-		Pany monobarit		Light yollow	T dir Hoodoo	ookiidio Ha	anytheriobanite
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You can make a user	inact	ive b	y goir	ng to	Name	Aarran Ellis			Active
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You can make a user Defaults -> User Defa	inact aults	ive b -> Pa	y goir I sswo	ng to r ds	Name Role	Harran Ellis	:		V Active
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You can make a user Defaults -> User Defa and either unticking Management or dou to display the Mainta unticking Active.	inact aults Active uble cl ain Us	ive b -> Pa e unc ickin sers f	y goir sswo ler Us g the form a	ng to r ds ser user and	Name Role Details Sen Position Email Mobile	Aarran Ellis Full Access curity Diary	gn Signatory		Active

When doing so you will receive the prompt. Select **Yes** to deactivate the user.



Additionally, you can no longer make your currently logged in user inactive.

If you wish to make your user inactive you will require another administrator to do so.