



cfp winMan™

setting the standard



CFP Software – Setting the Standard

CFP Software is the market leader and the largest supplier of Property Management & Lettings Software with over 3000 clients and tens of thousands of users throughout the UK

Over 20 years' experience

Developing Software solutions for property professionals since 1989, CFP Software have a history of meeting and exceeding the needs of the industry and today focus on setting the standard for Property Management and Lettings Agents with their Institute of Chartered Accountants in England and Wales (ICAEW) accredited product, CFPwinMan.

CFPwinMan is the ONLY Property Management Software package to be accredited by the ICAEW, as well as being ARLA, NAEA, NALS, RICS, NFOPP and Law Society compliant.

Also accredited since 1998 by Microsoft, CFP Software is proud to be a "Microsoft Certified Partner".

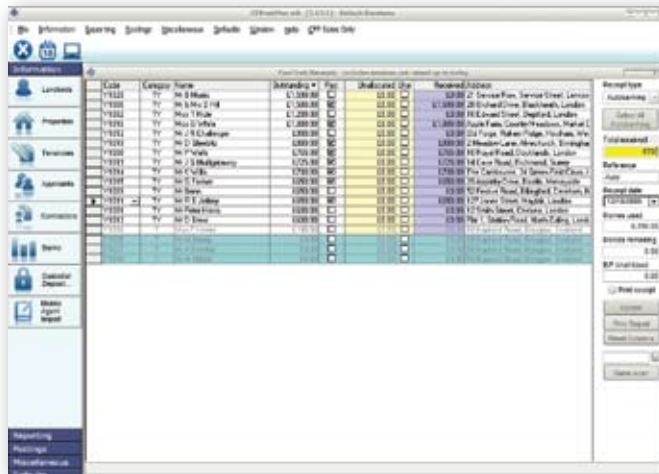
Our history and accreditation means that CFPwinMan can give you that vital edge that makes the difference and will enable you to provide the highest level of service to Landlords and Tenants.



Disclaimer: The Institute of Chartered Accountants in England and Wales has accredited CFPwinMan v3.2, from CFP Software, under the terms of the ICAEW Accreditation Scheme. Purchasers should ensure that the software, its security features and related support meet their own specific requirements, as the Institute will not be liable for any damage whatsoever, incurred by any person, occasioned by the use of the software, or any related products or services howsoever caused.



- **One-click Automated Letter Printing**
The fast and efficient way to produce the required paperwork. Produce as many letters as you wish with just one click!
- **Full Suite of Marketing Tools**
Window cards, brochures, property lists, newspaper adverts all completed in seconds.
- **SMS, MMS and e-mail Facility**
Direct from the programme – links with Microsoft Outlook.
- **Custom Report Generator**
Powerful, built in report generator to produce virtually any report you require.



Ground breaking technology simplifying all financial administration

- Complete double entry client cash accounting system – compliant with RICS, ARLA, NAEA, NALS & accredited by the Institute of Chartered Accountants in England and Wales (ICAEW).
- Facility for Overseas Tax and Multiple Client Accounts.
- Full Deposit Protection facilities, including optional live link to The Dispute Service to upload information and download Certificates automatically.
- Simple 'tick off' Bank Reconciliation.
- Fast Track Receipts Screen for entering batches of receipts quickly against a list of outstanding items.
- Multiple payments facility when paying Landlords and Contractors by BACS.
- Full secure Audit Trail.
- User-definable receipt types – debit card, credit card, etc.
- Standing Order import from bank software (optional).
- Direct Debit Module with AUDDIS processing/import verification/reporting which allows a Direct Debit call file to be sent to the bank (optional).

CFP multi-portal upload service

CFP Software offers a fully automated service that will allow you to upload all of your properties to a number of the UK's main property portals and third party technology suppliers including *Rightmove* and *Facebook*.

For a full and current list, please visit:

www.cfp-software.co.uk/products/multi-portal-upload

You will need to join the portals in the normal way (*subject to their individual membership and advertising conditions*) and they will then contact us to activate the data feed.

For further information on establishing a professional presence on Facebook, contact us on **0845 230 5333**.



Be seen on
the Social scene



Promote your business, effortlessly



Create all your marketing material in multiple formats from one central set of data. No duplication is required for CFPwinMan to produce:

- High impact brochures, client matching property lists and window cards.
- Store unlimited number of photographs, floor plans and virtual tours.
- Full e-mail, SMS text message and MMS multimedia message facilities included.
- AdDesigner module for rapid print-ready advertising production.
- Automatic link with The Mobile Agent.

integrated optional extras

CFP Software has a number of optional modules and partners offering market leading solutions which complement the way you do business

TDS Upload Module

The TDS Upload Module automatically uploads all the relevant information that is required by "The Dispute Service" directly to their website using your internet connection.

This is a fully automated system, which integrates with CFPwinMan, to save you time and reduce the risk of tenancy details not being sent to TDS.

It uploads all required fields and downloads the completed TDS Certificate as a PDF file, saving it straight back into the CFPwinMan database.

Any changes made to the tenancy details (e.g. a new start date, renewal, or if the tenancy becomes periodic), are also updated to the TDS website automatically; and at the end of the tenancy, the amounts returned to each party are recorded back onto the website to complete and close the tenancy.

Standing Order Module

The standing order module offers you the chance to import CSV files, issued by bank software, which contain information concerning standing order payments.

The module enables CFPwinMan to read the majority of CSV files and join together confirmed transactions with their relevant receipts.

If a file is rejected, our Standing Order Import Module won't simply dismiss it, the user has the opportunity to manually join the transactions in the import file to outstanding receipts. CFPwinMan will then 'learn' this link and it will remember for the next import, automating the process for you.

Once these transactions have been joined together, the user can then authorize the import and all receipts will automatically be updated. To further add to the flexibility of this module; Tenancies, Tenants and Landlords all have the ability to be included in this process.

CFPkeyBook Module

Have you ever lost a key? The CFPkeyBook Module makes it easy for you to fulfil your responsibility to manage the vast number of keys entrusted to you. The CFPkeyBook Module enables you to keep a full inventory of all keys per property, separately identifying sets for viewings and maintenance, tenants and master sets etc. A range of reminders and reports built into the software allows you to track overdue and key returns.

Postcode Integration

Enter the postcode and CFPwinMan's optional Postcode Integration will fill the address lines into the software, leaving you just the house number or name to enter.

CFPwordBro

The CFPwordBro Module allows the use of Microsoft Word 2000 (or later versions) for production of property brochures, in addition to the desktop publisher that is already built into CFPwinMan. Use of this module allows an unlimited number of Microsoft Word document templates to be built for your own presentation of property particulars. CFPwordBro allows for almost unlimited flexibility in size and format.



Service Charge Module

CFPwinMan's Service Charge Module caters for residential and commercial block management specialists.

Create **multiple invoices** with relevant notices easily by simply setting a budget for each expenditure category and a percentage contribution for each tenant/leaseholder. Budgets are then calculated and apportioned automatically and can be charged over any period (monthly, quarterly, half-yearly, yearly or even in arrears)!

Set up **multiple bank accounts** for trouble-free segregation of rents, deposits, grounds rents, sinking funds etc, with a separate **reconciliation for each bank account** you have.

The **comprehensive reporting suite** includes detailed expenditure reports against the budgets you have set and **balancing statements** for year end accounting.

The integrated commercial functionality can even generate **pro-forma invoicing** and **client VAT analysis** per property.



Landlords Online

Upload key information that landlords require access to via a secure website to give them anytime access. This means fewer phone calls, puts the landlord back in control and delivers efficient communication.

- Access to their accounts 24 hours a day, 7 days a week.
- Copies of previous statements.
- Messages that can't get lost.
- Completed SA105 Land & Property self-assessment tax forms at the end each year.

Agreements, Notices and Letters

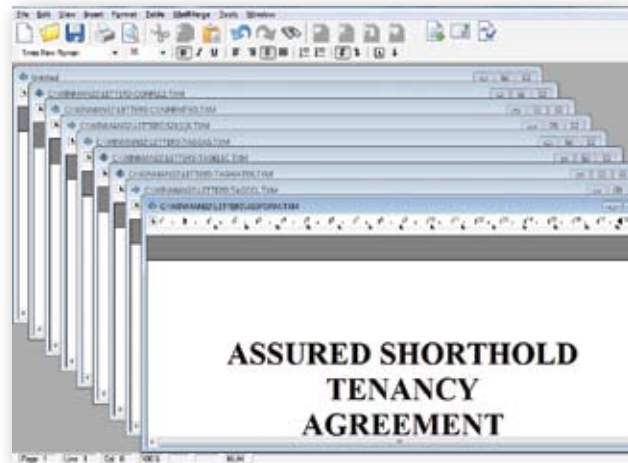
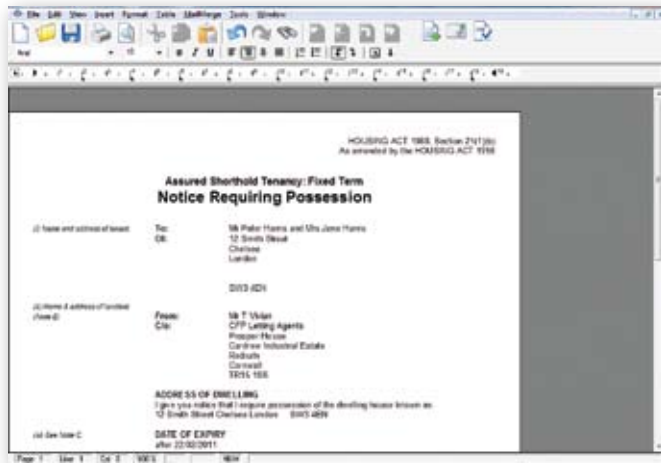
We have strong relationships with the industry leading tenancy documentation providers and can supply documents built into CFPwinMan from The Letting Centre, Pain Smith Solicitors

both of which are long established and well regarded legal advisory bodies that aid the Lettings Industry

These professional quality tenancy agreements are available under licence and come complete with an update service and Drafting Notes which provide comprehensive information about the use of tenancy agreements, recent legal precedents, restrictions on term, stamp duty, etc. Many additional legal notices and everyday standard letters are also included, making these documents invaluable to most of our customers.

The documents are all revised and checked frequently by specialists and can be tailored individually according to each firm's requirements.

These contracts, letters and notices from our providers are already integrated with our CFPwinMan software, allowing you to mail merge, print and automatically save documents either individually, or in groups, with just one click!



Rolling Screens

Designed for displaying your available properties in a sleek and professional manner, perhaps on a plasma/LCD screen in your office window, on a projector, or even on your desktops, this module allows your applicants to easily see your stock in the best possible way.

An option in the Miscellaneous/Property Lists screen within CFPwinMan^{scdb} allows for a simple export of information to the Rolling Screen Module.

Once done, with just a right mouse click you can customise the appearance of your properties, choosing from options such as number of rooms, transition effects, RSS news feeds, etc.





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**Rest assured all aspects of your
accounts are in the safest hands**

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CFPsolutions

Outsourced client cash accounting service

Are you spending more time on administrative and client accounting tasks than you are growing your business?

Do you worry about covering staff sickness and holiday or the costs of employing an accountant?

Do the growing levels of compliance and legislation give you sleepless nights?

As the market leader in property management software we know our customers and the concerns and responsibilities they have to contend with on a daily basis.

We are pleased to be able to offer a service that will enable you to focus on the things that really matter and make a measurable difference to your bottom line.

How it works

CFP Solutions works by taking responsibility for inputting accounting transactions into your CFPwinMan software on your behalf.

CFP Solutions connects remotely to a computer in your office and inputs your account transactions for you. This can be done on a daily basis, or, if you prefer, at set times during the week.

All printouts are produced at your office for your convenience, and you still retain control of any physical financial transactions based on the information that we have provided.

Key benefits

In addition to the extra time that you are able to save with this service, there are a number of other major advantages CFP Solutions will bring to your business:

- All your accounting transactions taken care of, satisfying HM Revenue and Customs' rules.
- Avoid annual accounts problems.
- Problems of staff sickness and holidays become a thing of the past.
- No National Insurance contributions.
- No staff training required.
- Cut down your payroll costs.
- Reduce management time.
- Tax deductible!

Contact us today for a tailored solution

For competitively priced solutions, tailored to meet your needs, contact us today on **0844 573 6095** or email us at **cfpsolutions@cfp-software.co.uk** and enjoy a dependable service that saves you both time and money.



customer support

We offer the highest levels of support and training and listen to our customers' requirements to ensure we develop our software to meet their changing needs

Telephone Hotline Support & Updates

At CFP Software, we consider we have the best (and largest) support team in the business. We constantly monitor call traffic to be able to provide the optimum response times and we record and monitor calls for customer satisfaction & training purposes. We pride ourselves on our levels of support and receive large numbers of enquiries each month from customers recommending us to others they know in the industry.

Our support team is made up of highly trained professionals who are dedicated solely to telephone support. Our Support and Updates program covers the maintenance of the software, assistance in the use of the software and free updates as the software is continually developed.

Product Development

Our development strategy is defined as far ahead as we can practically forecast to accommodate all legislative and technical change. We consult with professionals across the industry to ensure our development program delivers functionality and performance at a pace that can be relied upon to provide consistency, compliance and quality. Our latest release, CFPwinMan^{scdb} (SQL database), allows us greater product flexibility and scalability to accommodate multiple office networks.

Training

Training is essential to ensure you get the most out of your investment and give you and your staff the ability to understand and benefit from all the functionality the system has to offer. We have a nationwide field based team available to support you all the way from installation through to refresher sessions and helping with the induction of new staff.

Training can take place at one of our Regional Training Centres or by telephone, but for specific training, we recommend that it takes place in your office, so we can provide you with a practical real-life experience, using your own data.

the techy bit

Microsoft's new State-of-the-Art platform offering better resilience, superior database and enhanced performance

Features

- Scalable performance not degraded by volume.
- Microsoft's State-of-the-Art platform – SQL Server.
- Secure database.
- No limit on database size.
- Backup available even when in use.

Hardware Specification Required

A consequence of CFPwinMan being continually developed is that our hardware, operating system and network specification is reviewed on a regular basis. Please check with the Sales Office on 01209 314371 to find out the latest Hardware and Software specification required to run CFPwinMan; or look on our website www.cfp-software.co.uk. Our experience tells us that to make the most out of such a powerful piece of software, it is vital that the hardware, operating system and network meet our suggested specification.





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