



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

**IN-TRAY EXCHANGE SERVICE
AND OUTLOOK IN-TRAY ADD-IN
INTEGRATION
TRAINING GUIDE**

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Version 1.0



CONTENTS

Overview.....	3
Automatically Processing Unlinked Emails.....	3
Manually Processing Unlinked Emails.....	3
Incoming Emails - Linking to the In Tray.....	4
Outgoing Emails – Linking to Client's Documents.....	6
Outlook Categories.....	7
Message Pending Processing.....	7
Message has Already Been Processed.....	9
No Banner at All.....	11
Linking Emails With a Combination of Status Banners.....	11
This Message has Already Been Processed by a User with the RPM In-Tray Outlook Add-In..	13
An Email with Multiple Banners.....	14
Changing Category Colours.....	15
CPL Knowledge Base.....	17



OVERVIEW

The RPM In-Tray Exchange Service is a Windows Service designed to automatically check incoming and outgoing emails on an Exchange or Office 365 server, and attempt to link any emails to In-Tray (incoming) or Client (outgoing) within CPL.

The In-Tray Exchange Service runs on a Windows server, and is set up and maintained by CPL Software. Users do not interact directly with the service, and won't see any additional software on their machines. They will not need to change how they work as the service will do everything automatically in the background.

However, it may help users to be aware of what the In-Tray Exchange Service does, and how it interacts with the Outlook In-Tray Add-in.

Additionally, one or more users will need to be assigned to monitor the Default In-Tray. This is where emails that the service was unable to link to a specific user will go. This will be decided in advance by the company using the service, and set up by CPL Software accordingly.

Once set up and running, the In-Tray Exchange Service will check for new incoming and outgoing emails on a cycle, with a minimum of one minute between check cycles to avoid overlapping checks. This delay between checks can be increased if required.

Incoming emails will be examined to see who they are from, and if matched to a client or a purchase ledger account they will be sent to the appropriate In-Tray. Details of how the matching is performed and which In-Tray an email will be sent to are contained in this guide.

Please note that all emails will still go into the user's Outlook email list, the In-Tray Exchange Service does not change that in any way.

Outgoing emails will be examined to see who they are being sent to, and if matched to a client they will be sent to either that client's documents list, or to the In-Tray of that client's property manager, depending on which option your company requires.

AUTOMATICALLY PROCESSING UNLINKED EMAILS

By default, emails that cannot be matched to any client or purchase ledger account are ignored by the In-Tray Exchange Service, and are not processed. However, the service can optionally be configured to process emails even if they cannot be linked to anyone. In this case, they will be placed in the **Default In-Tray**, for the user(s) responsible for maintaining that In-Tray to deal with as they deem appropriate.

Please note, if this option is enabled, then all emails received and sent will end up in the In-Tray system. This means that if an email account is used for both business and personal emails, the personal emails will be placed into the In-Tray in CPL.

MANUALLY PROCESSING UNLINKED EMAILS

As an alternative to the above, users can use the **Outlook In-Tray Add-In** to manually process emails that the Exchange Service was unable to link.

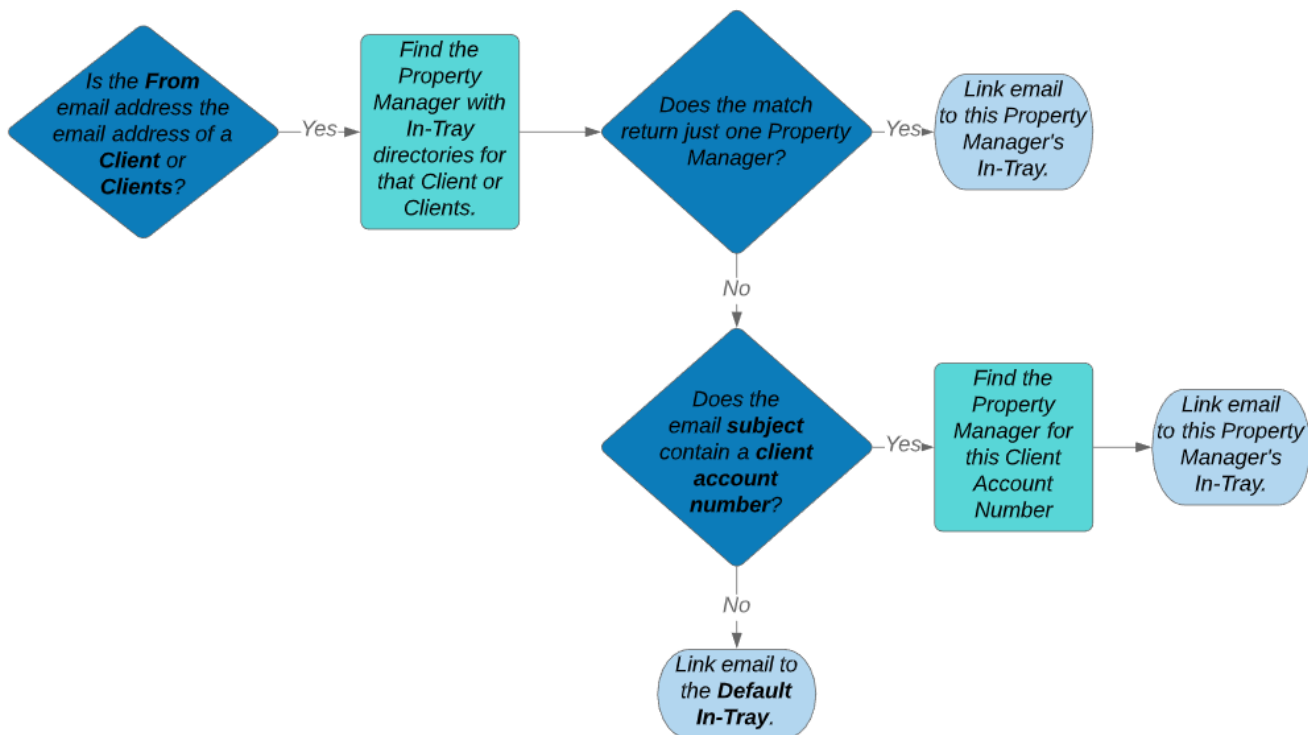
For example, let's say an email arrives from a client informing you that they have changed their email address. The email is from their new address, and so will not yet be recorded in CPL. This means the email will not be linked by the Exchange Service. This email will still appear in the user's Outlook emails because the In-Tray Exchange Service doesn't change that at all. The user can then manually link the email to the In-Tray of the property manager for that specific client. That property manager can then add the new email address to the appropriate client's record.



INCOMING EMAILS - LINKING TO THE IN TRAY

To determine which user's In-Tray the message should go to, the In-Tray Exchange Service will perform the following checks:

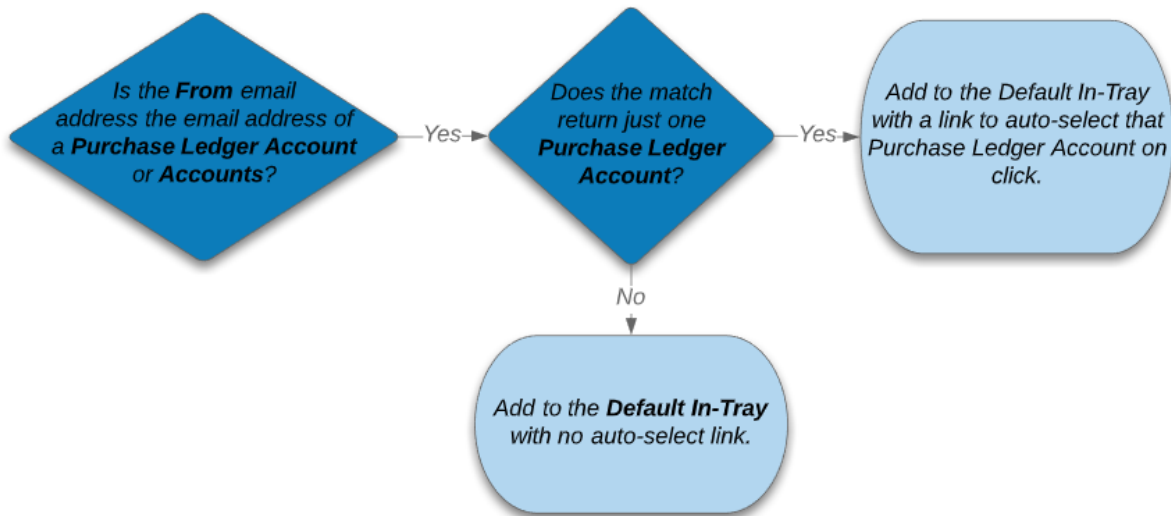
1. Email from a Client or Clients only



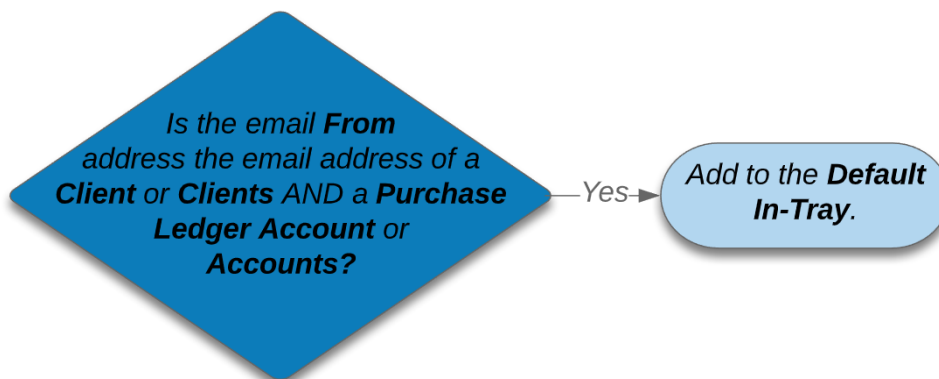
Please Note that if the email links to a single client, then an auto-select will be added to the In-Tray to select that client. When the email is clicked in the In-Tray, that client will be automatically selected too.



2. Email from a Purchase Ledger Account company

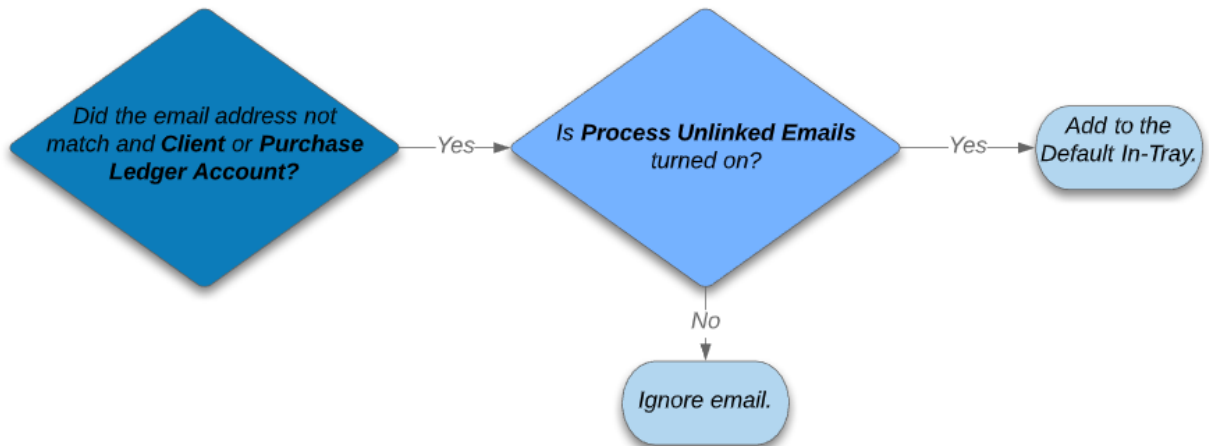


3. Email from an address used for multiple purposes

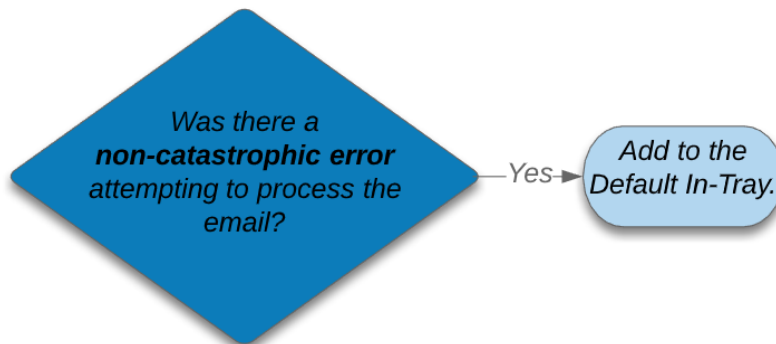




4. Email from an Unknown Address



5. Error processing Emails



*Please Note that for catastrophic errors, the email will be forwarded to the **Forward Failed Emails To** address for manual processing. See the section on **Failed Emails** later in this guide for more details.*

OUTGOING EMAILS - LINKING TO CLIENT'S DOCUMENTS

Outgoing emails can either be linked to the **In-Tray**, using exactly the same rules as above, or to the **Client's Documents**.

This is a global setting, determined by the company and then set by CPL Software. It must be set for one or the other and cannot be set as a combination of both.

If this is set to link outgoing emails to the **Client's Documents**, then the following criteria must be true:

- The email address of the recipient must be used by only one client
- The email address of the recipient must not be used by a PL Account

If both of these conditions are met, then the email will appear in the documents tab of the client that the email is being sent to.

Activity		Diarised Charges			Web Portal Tracking				
Account	Addresses	Memos	Documents	Transaction Activity	Credit Control	Float Transactions	Charge Transaction	Allocations	Maps/Directions
Documents History									
Show		Current	DocumentType	--SELECT--	Transmit Types		--SELECT--		
Search									
Date Time	Document Type	Description	User	Sent / Received	Deleted	Read / Unread	Web Document Type		
19/11/2019 16:07:09	Client Letters	Test of Outgoing email saved to Client's Doc...	Administrator	Sent	<input type="checkbox"/>	<input type="checkbox"/>			
31/10/2019 17:11:42	Client Letters	Test of capturing email address	Leslie	Received	<input type="checkbox"/>	<input type="checkbox"/>			

Please Note that the email will display as **Client Letters** in the **Document Type** column and **Sent** in the **Sent/Received** column rather than as an Email. The **user** will also be marked as **Administrator**.

If either of the above criteria are not met, then the outgoing email will be processed into the In-Tray, using the same rules as for incoming emails previously mentioned.

OUTLOOK CATEGORIES

To let the user know that an email has been processed by the Service, it will get flagged in **Outlook** using a **Category** when it is **selected** or **opened**. Please note that the flagging won't happen until this point, as checking is only possible when the User interacts with the email.

Please note that the categories will only show up in Outlook if you are using the **RPM In Tray Outlook Add-In**. Some categories will only show up if you are using both the **RPM In Tray Outlook Add-In** and the **Exchange Service**.

The categories are listed and explained below.

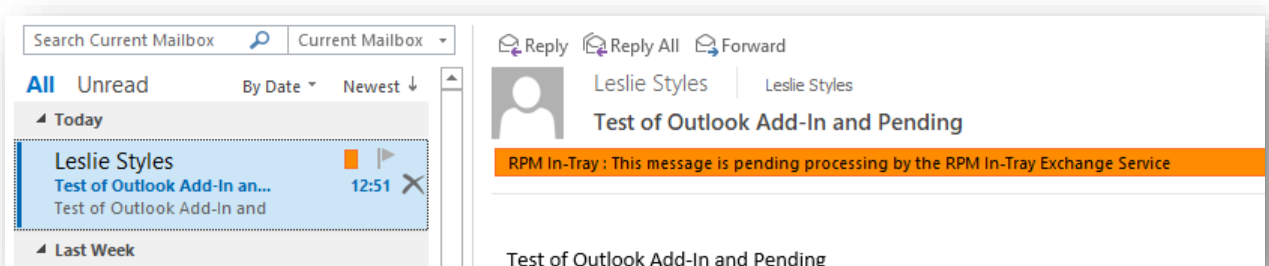
MESSAGE PENDING PROCESSING

RPM In-Tray : This message is pending processing by the RPM In-Tray Exchange Service

Because the Exchange Service checks for and processes new emails on a cycle, it is quite likely that users will see an email in Outlook before the Service has managed to process it.

In this case, the email will have an orange banner above it, notifying the user of this.

The email will also display an orange tag in the email list, as shown below:

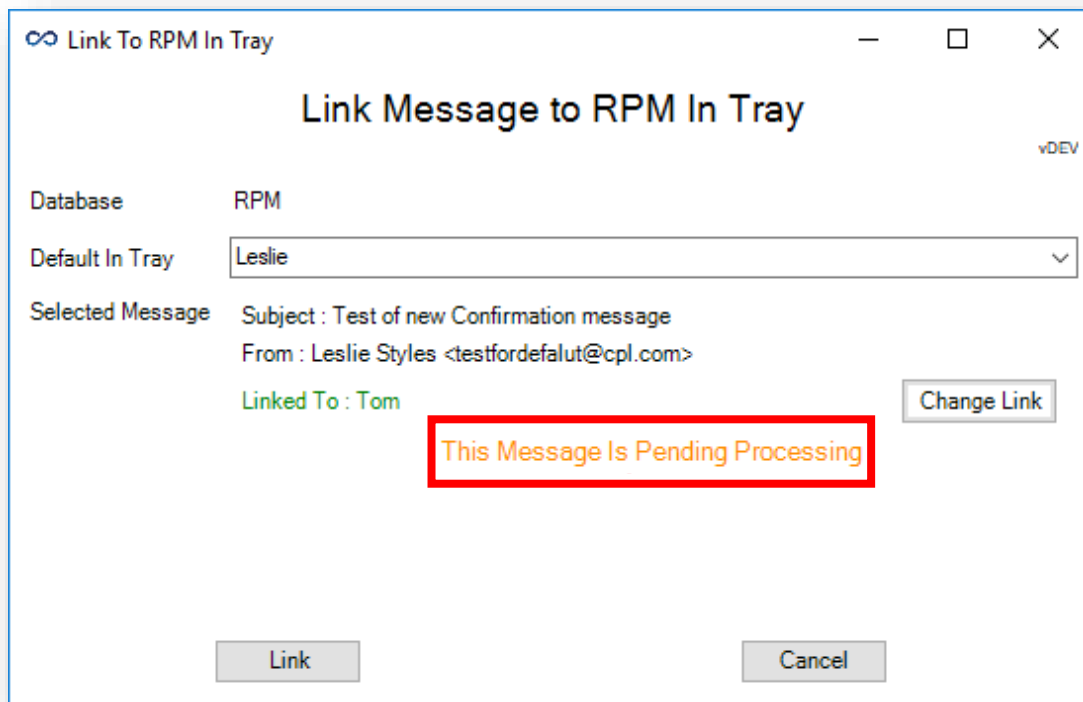




This information banner and tag will only show up if you are using both the **RPM In Tray Outlook Add-In** and the **Exchange Service**.

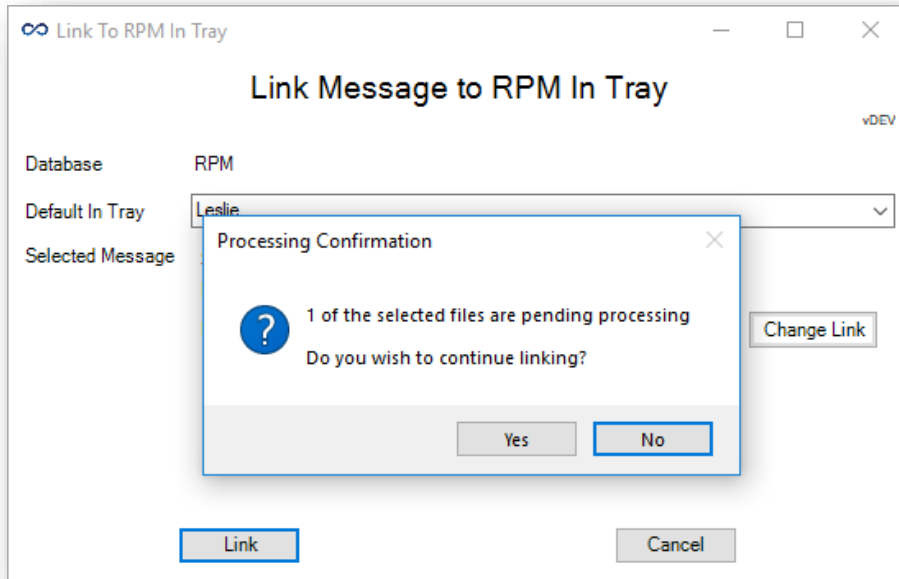
This banner is purely for information purposes, and will not stop the user from doing anything with the email.

This means they will also be able to manually process it with the RPM In Tray Outlook Add-In. However, in this case the user will be warned that it has not yet been processed, as can be seen in the screenshot below:



This is a warning only, and does not prevent the user from continuing.

If the user chooses to continue, and click **Link**, they will get a second warning.



If they click **Yes** to continue, then the email will be linked to the In-Tray.

If a user does continue to manually process the email, there is a possibility that the email will end up in the In-Tray system twice as the Exchange Service links it as well as it being manually linked.

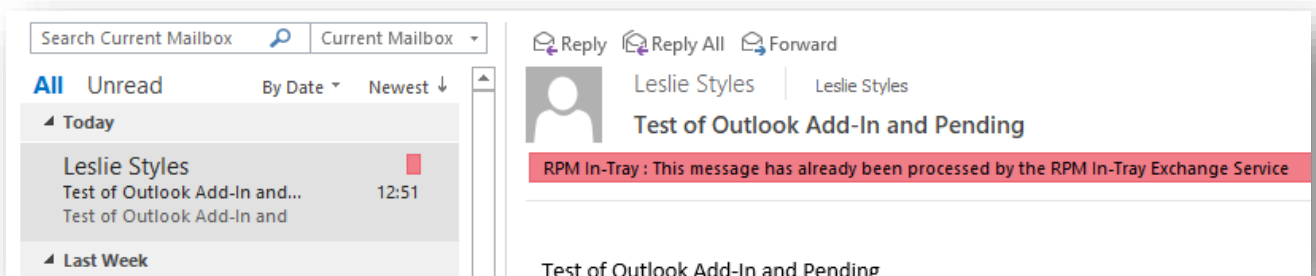
Care should therefore be taken when manually processing an email that is still pending automatic processing.

MESSAGE HAS ALREADY BEEN PROCESSED

If the email has been processed by the Service, it will display a red banner saying:

RPM In-Tray : This message has already been processed by the RPM In-Tray Exchange Service

The email will also display a matching red tag in the email list, as shown below:

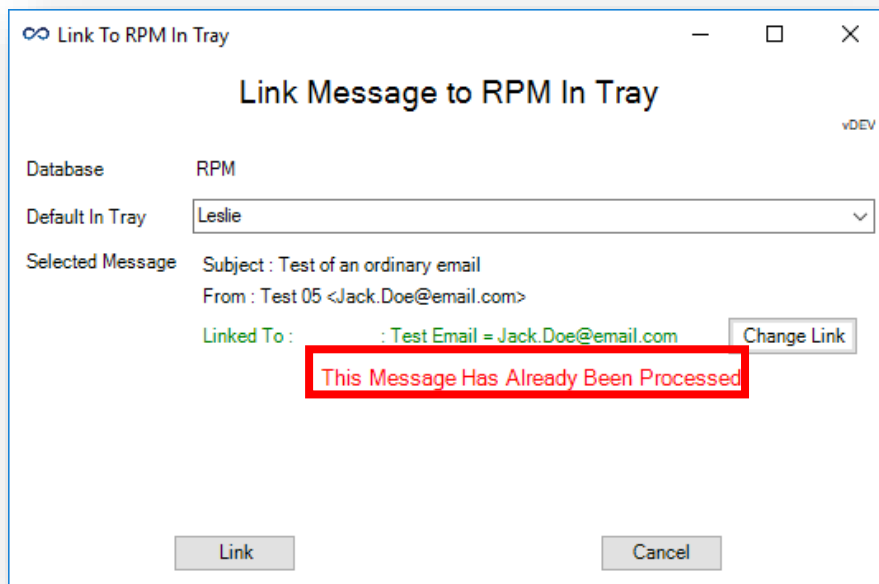


This banner and tag will only display if you are using both the **RPM In Tray Outlook Add-In** and the **Exchange Service**.

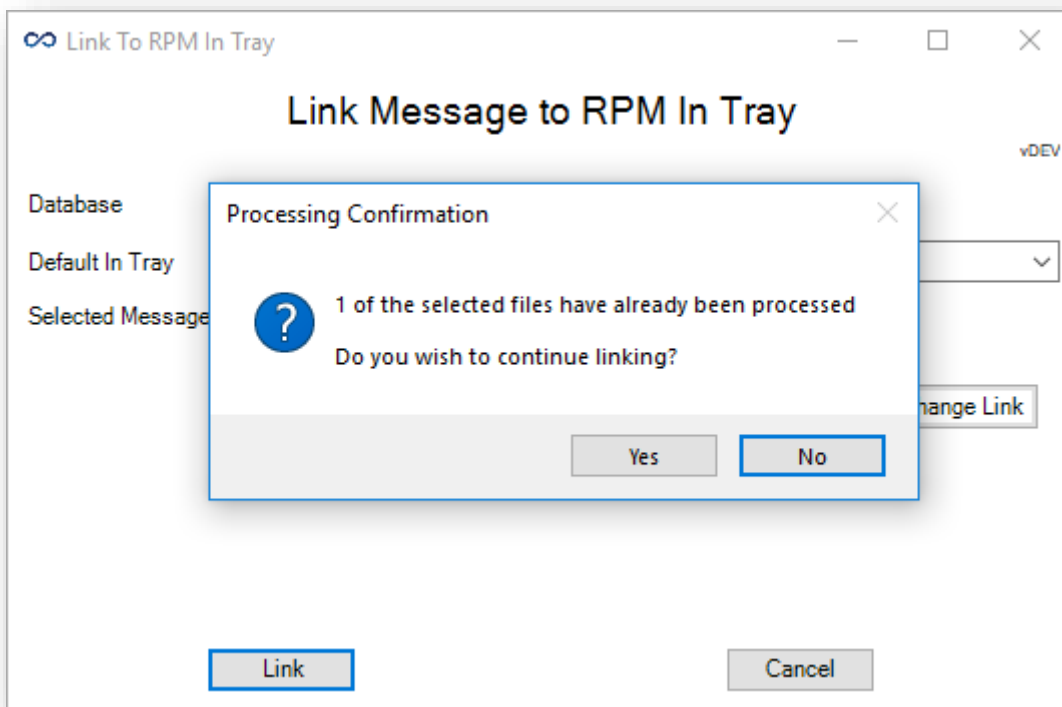


This banner is purely for information purposes, and will not stop the user from doing anything with the email.

This means they will also be able to manually process it with the RPM In Tray Outlook Add-In. However, in this case the user will be warned that it has already been processed, as shown in the screenshots below.



If the user chooses to continue, and click **Link** anyway, they will get a second warning letting them know that the email has already been processed by the Exchange Service.



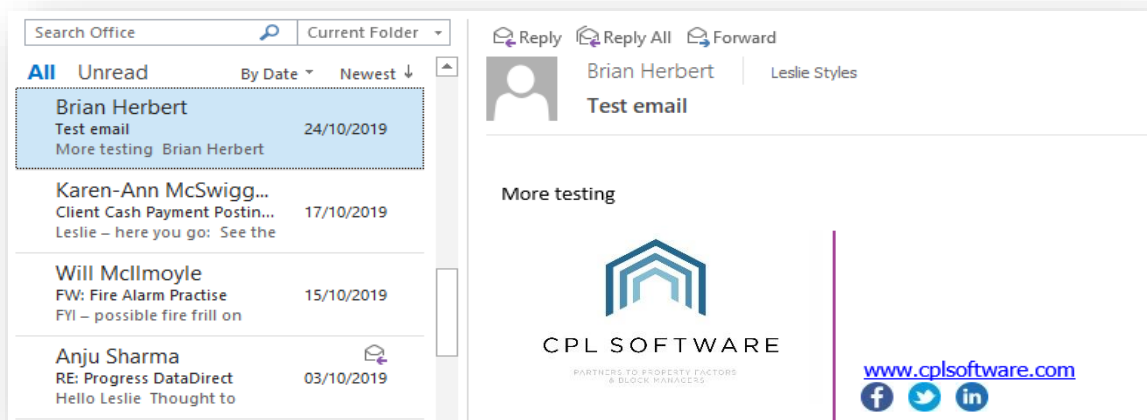


If they click **Yes** to continue, then the email will be linked to the In-Tray.

NO BANNER AT ALL

If the email has no banner at all, then the Exchange Service has processed the email but has not been able to link it.

Please note that this assumes that they're using **both** the **Exchange Service** and the **Outlook In-Tray Add-In**.



If they are not using either of these, then they will not see either of the banners already mentioned.

As you can see, the above email doesn't display a banner or a tag.

At this point, the Exchange Service has decided that it can't automatically link the email, and has been set up not to process unlinked emails.

The user can now decide whether to manually link the email using the Outlook In-Tray Add-In.

If it is a work-related email, for example the previous example of a client notifying the company that they have a new email address, then the user can manually link the email to that client's property manager.

Please note there is a known Microsoft bug where a tag may not always disappear straight away.

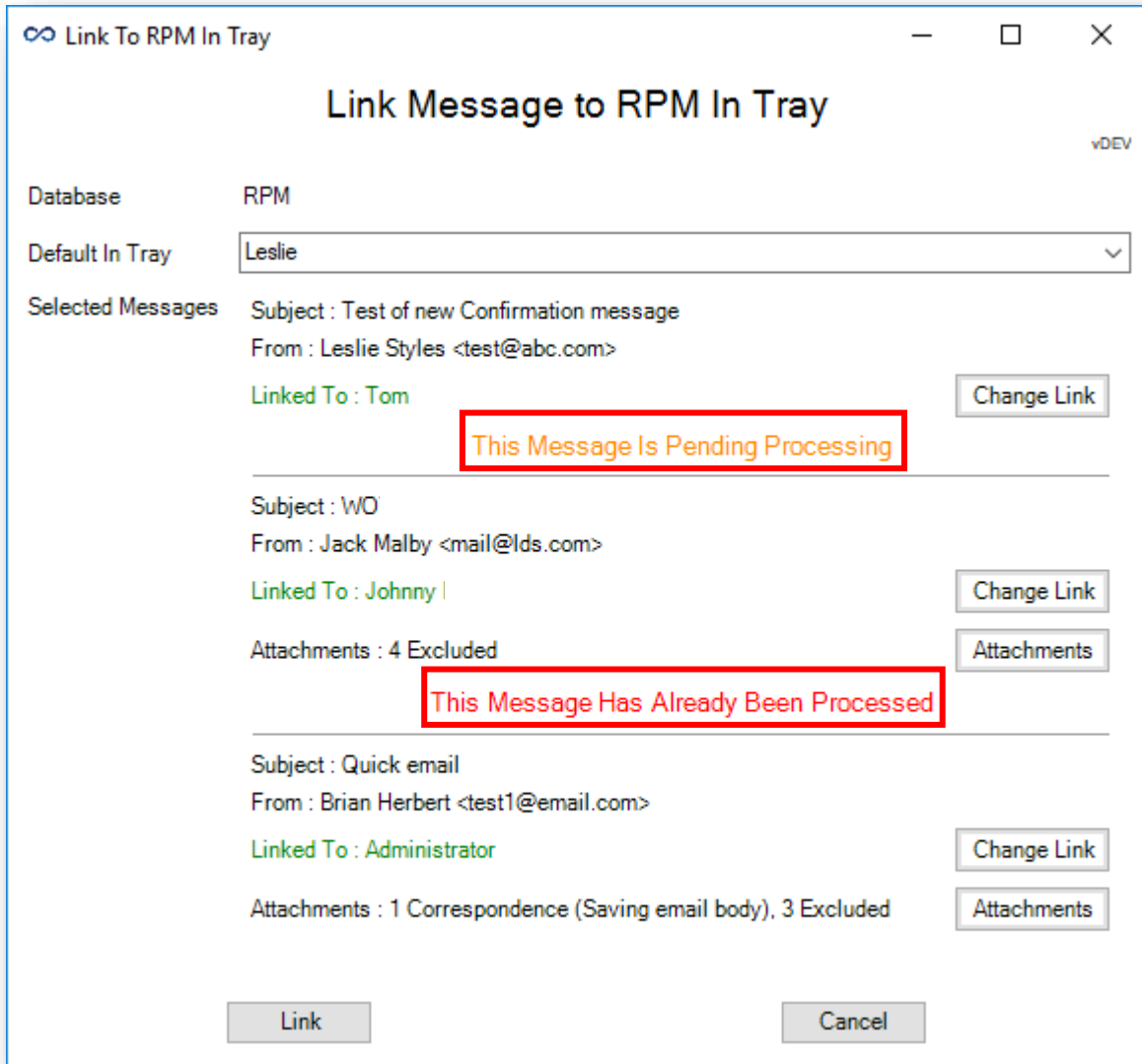
In this situation, users might find that sometimes the orange 'pending' tag will remain, despite there no longer being a banner informing them of this.

This is out of our control, unfortunately, however next time Outlook is restarted the tags should reset correctly.

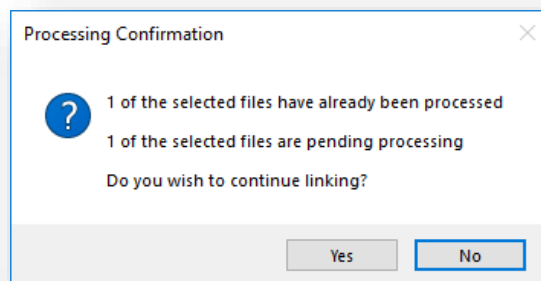
LINKING EMAILS WITH A COMBINATION OF STATUS BANNERS

Using the Outlook In-Tray Add-In, it is possible to select and link multiple emails at once.

This raises the possibility of linking items with a combination of status banners, as shown below:



These are warnings only, and will not prevent the user from continuing. As previously, the user will get a secondary warning if they continue to click **Link**.



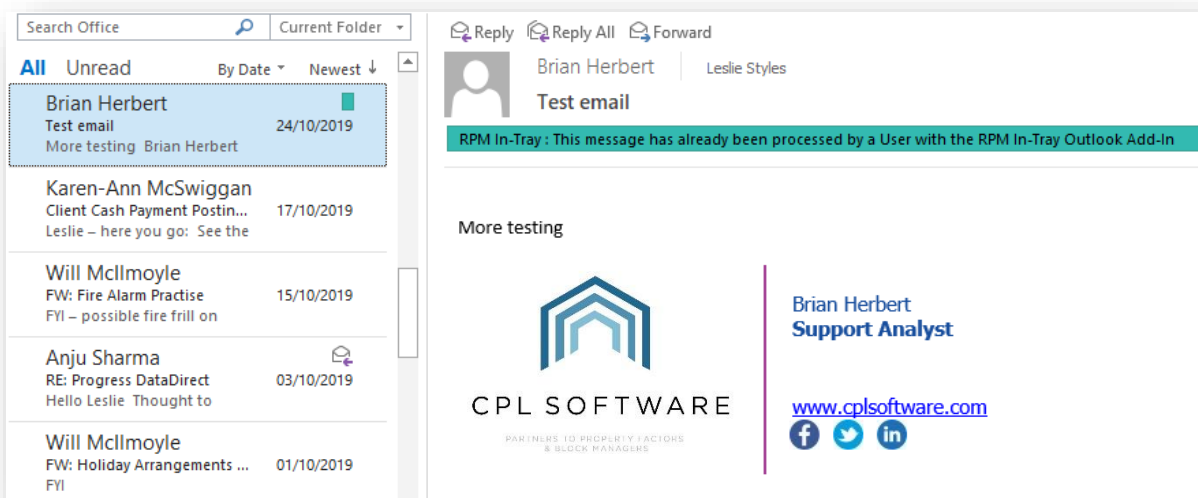
They will then see a **Processing Confirmation** message. Clicking **Yes** on this will continue and link all selected emails to the In-Tray.



THIS MESSAGE HAS ALREADY BEEN PROCESSED BY A USER WITH THE RPM IN-TRAY OUTLOOK ADD-IN

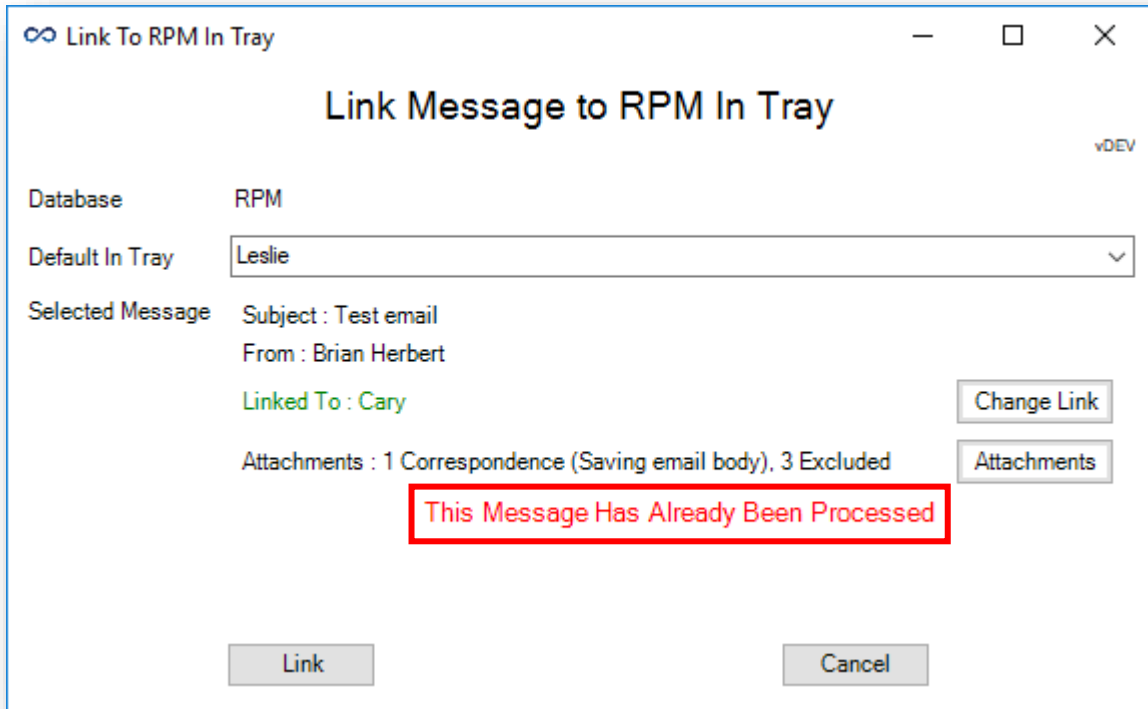
If the email has been processed by an Outlook In-Tray Add-In user, it will be have a cyan tag in the email list, and a cyan banner saying:

RPM In-Tray : This message has already been processed by a User with the RPM In-Tray Outlook Add-In



Please note that this banner is only dependent upon using the Outlook In-Tray Add-In, and will appear irrespective of whether the company are using the Exchange Service.

In this instance, if the user attempts to link the email again, a warning message will be displayed.

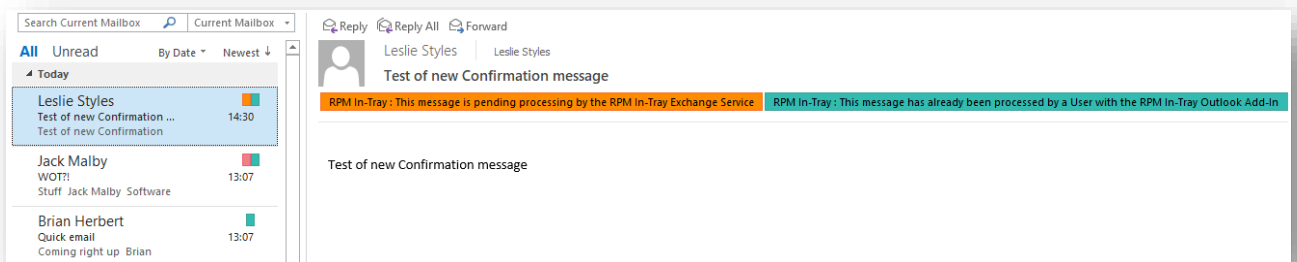


This will then be followed by the same secondary confirmation if the user clicks to **Link** the email.

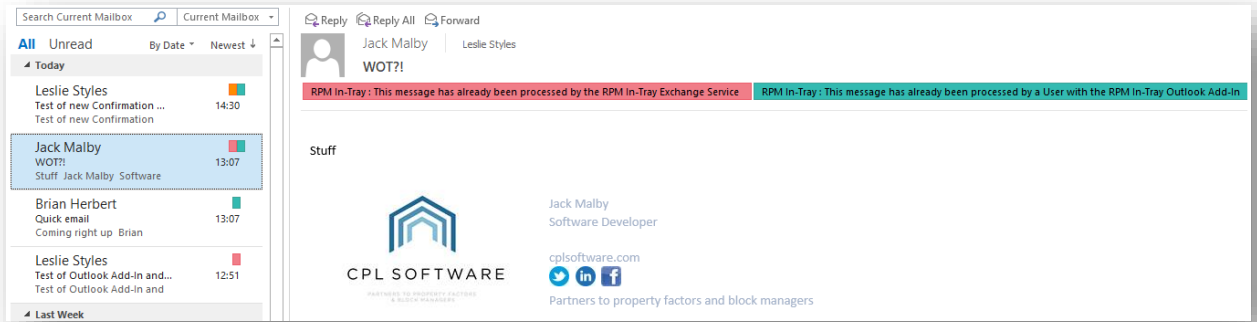
AN EMAIL WITH MULTIPLE BANNERS

Because emails can be processed manually using the Outlook In-Tray Add-In as well as automatically by the Exchange Service, it is possible that they can have two banner statuses.

For example, if an email is manually processed while still pending automatic processing, they will see both the orange **Pending** banner and the cyan **Processed by User** banners display.



If an email has been automatically processed and manually processed, they will see both the red **Automatically Processed** and green **Manually Processed** banners display.

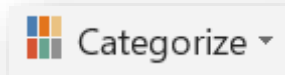


In both cases, you will see they also get two tags in the email list to match.

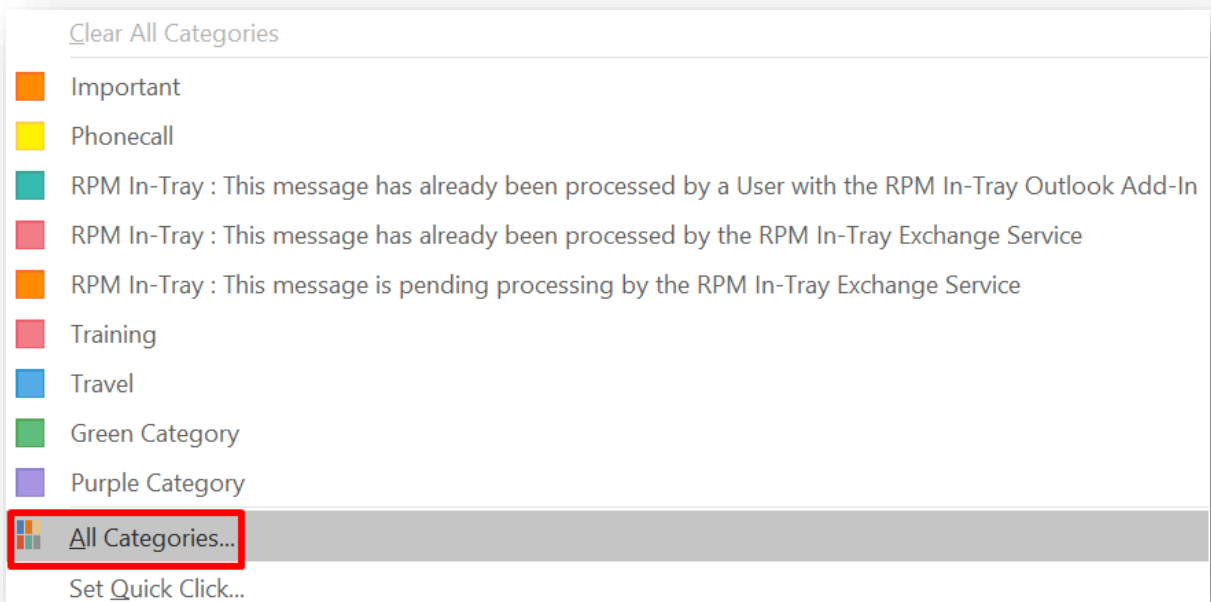
CHANGING CATEGORY COLOURS

Whilst the banners and icons shown above will default to red or green, it is possible for the user to change that to another colour in Outlook, for example if they're already using a red category for another purpose.

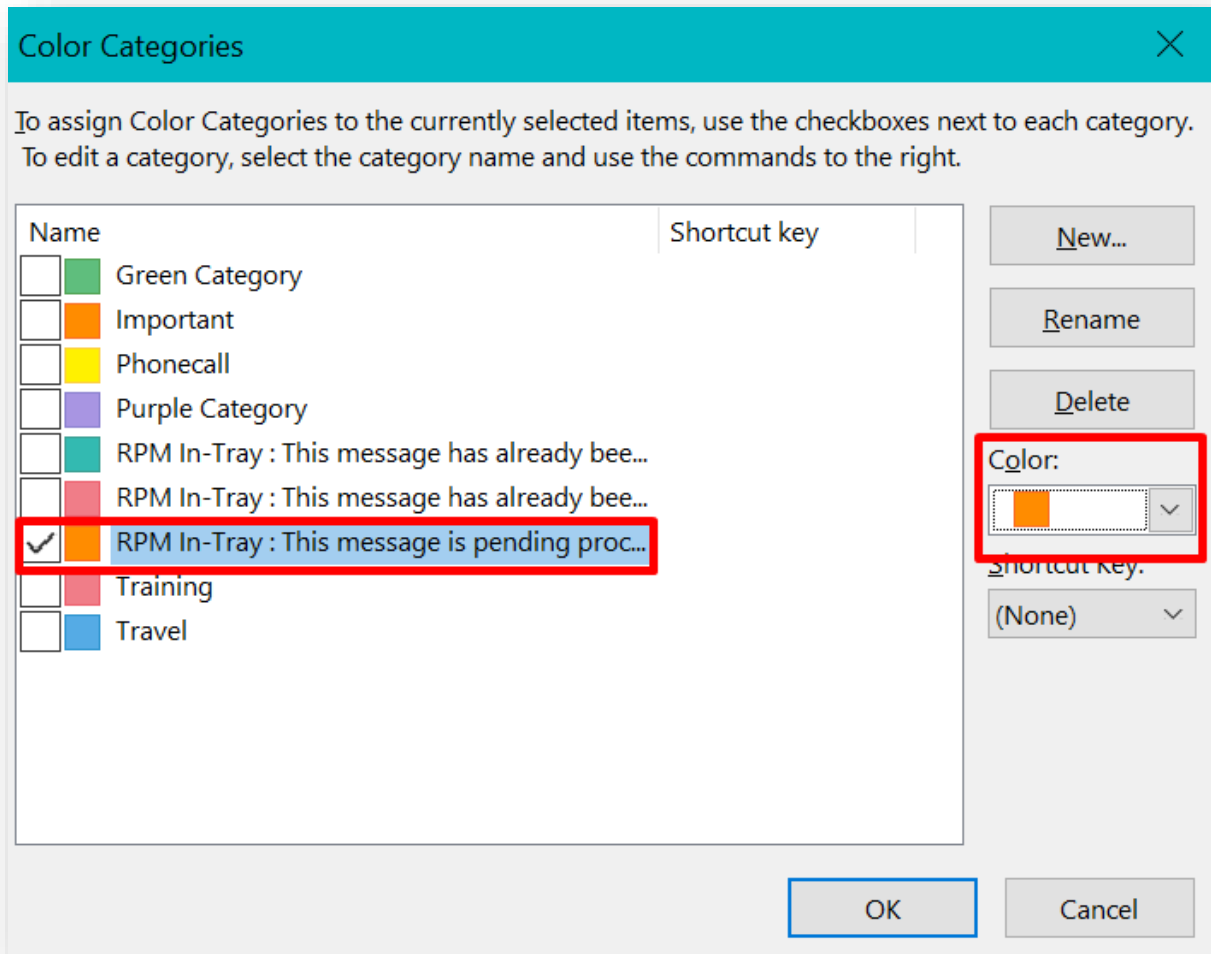
To do this, click on **Categorize** in the **Home** menu ribbon in Outlook.



This will bring up a drop-down list containing the **All Categories** option.



Clicking on the **All Categories** item in the drop-down menu will open the **Color Categories** list.



Select the item you wish to change the colour for, and then select the colour from the **Color** drop-down menu on the right.



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CPL KNOWLEDGE BASE

This training guide forms part of CPL's Knowledge Base which is available for all CPL users at <https://contact.cplsoftware.com/portal/home>

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@cplsoftwareltd148.zohodesk.com or through our portal at <https://contact.cplsoftware.com/portal/home> or calling us on 0345 646 0240 (option 1).

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