



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS  
& BLOCK MANAGERS

# PROCESSING INVOICES IN THE IN-TRAY V1.0

## TRAINING GUIDE

FEB 2024

Version 1.0

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## INTRODUCTION

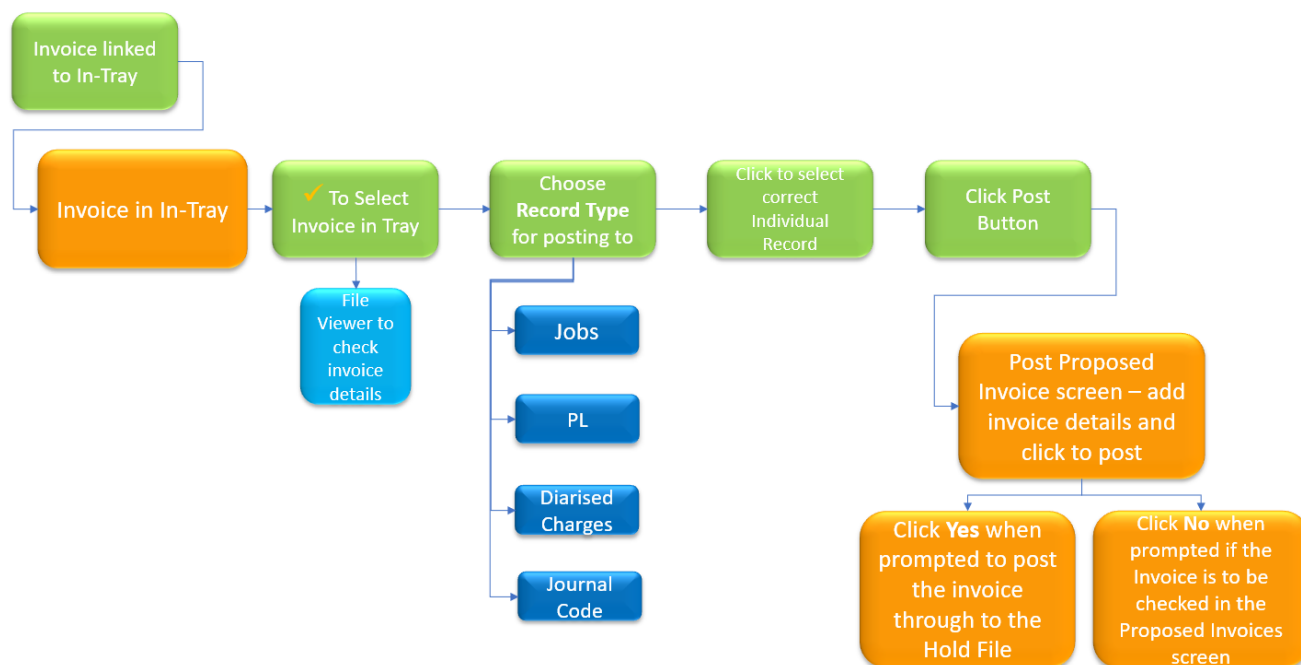
Invoices can be processed through into the Hold File from the In-Tray. This process utilises the Proposed Invoices module in CPL and there are different options which can be selected to suit the authorisation process within your company.

There is a section at the end of this guide covering the In-Tray Outlook Add-In tool which will enable you to set this up and use it correctly. Please note, there will be an RPM Outlook Add-In install file available in the RPM Distributions folder in your CPL mapped drive.

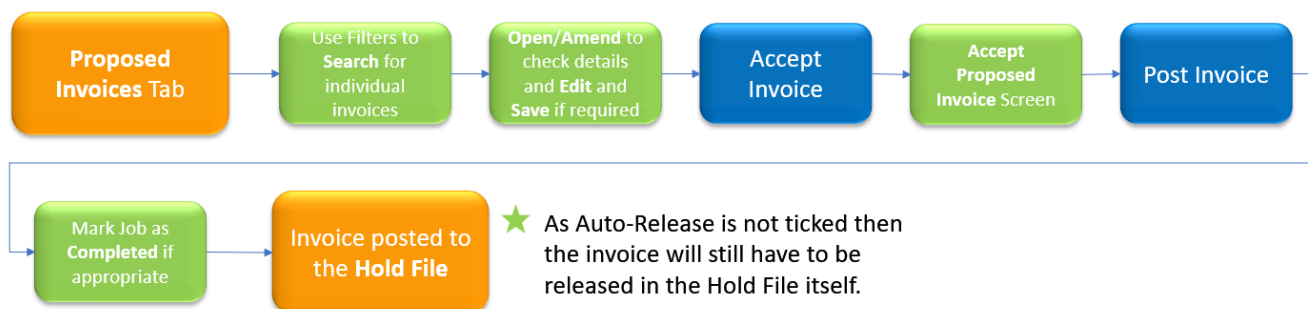
The diagram below sets out all of the stages for processing invoices through from the In-Tray. This process presumes you have already processed any contractor invoices into the In-Tray to begin with. These could have arrived in the In-Tray by one of the following methods:

- Invoice files can be linked from Outlook using the In-Tray Add-in tool.
- Paper invoices can be scanned and sent directly to the appropriate user's In-Tray directory.
- Invoice files can be dragged and dropped into the appropriate user's In-Tray.
- Invoice files can be automatically sent through to using the Exchange Service/Email Parser.

The diagrams below represent the process for posting invoices through from In-Tray and into the Hold File.



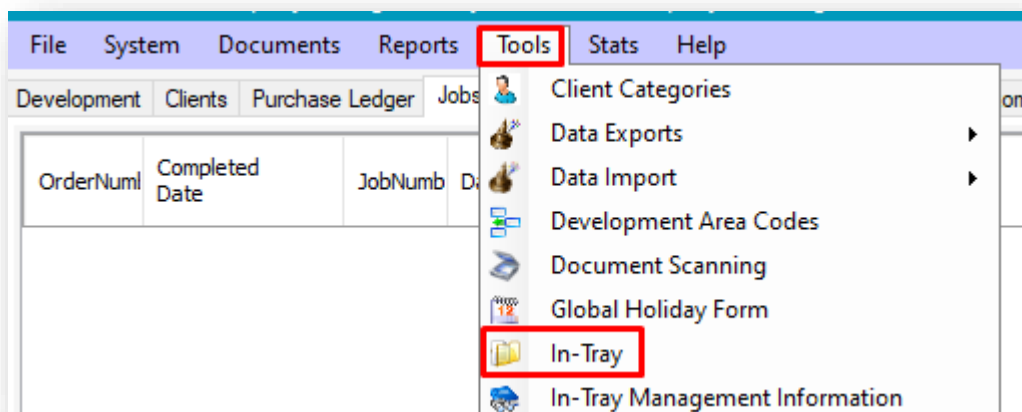
This leads onto the following workflow in Proposed Invoices.



## POSTING INVOICES FROM THE IN-TRAY

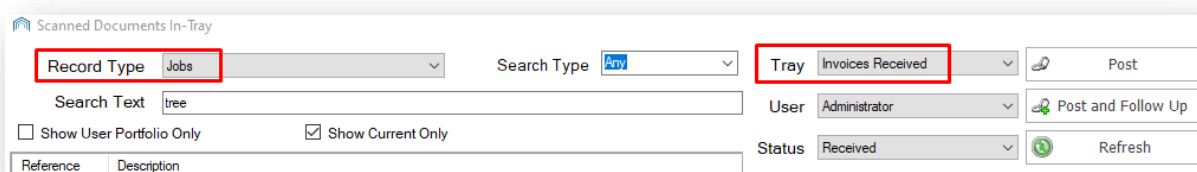
### ACCESSING THE IN-TRAY

To access the In-Tray in CPL, click on the **Tools** menu in the top bar in CPL and you will see that a menu appears where you can click to select the **In-Tray** option.



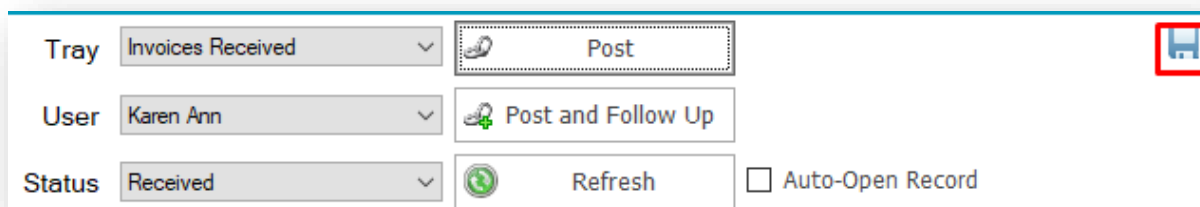
### SETTING UP YOUR IN-TRAY

On the main In-Tray window, select your **Tray** as **Invoices Received** and select your **Record Type** on the left of the screen as **Jobs** or **Purchase Ledger**.



It is also useful to set your **Status** option to **Received**.

When you have completed your set-up, click on the **Save** icon in the top-right of the screen.



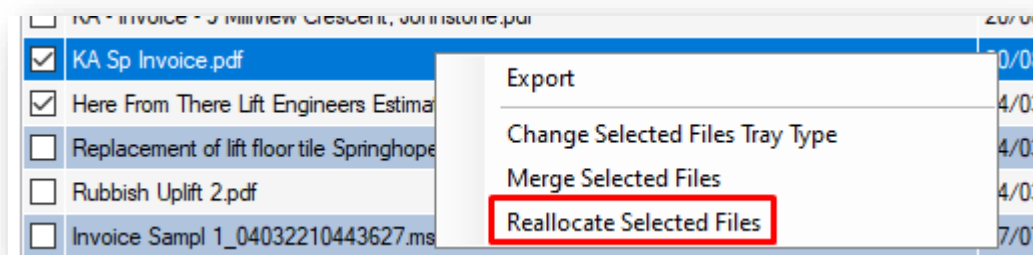
### INVOICES YOU HAVE RECEIVED

The invoices which have been added to an In-Tray will be listed in the In-Tray grid.

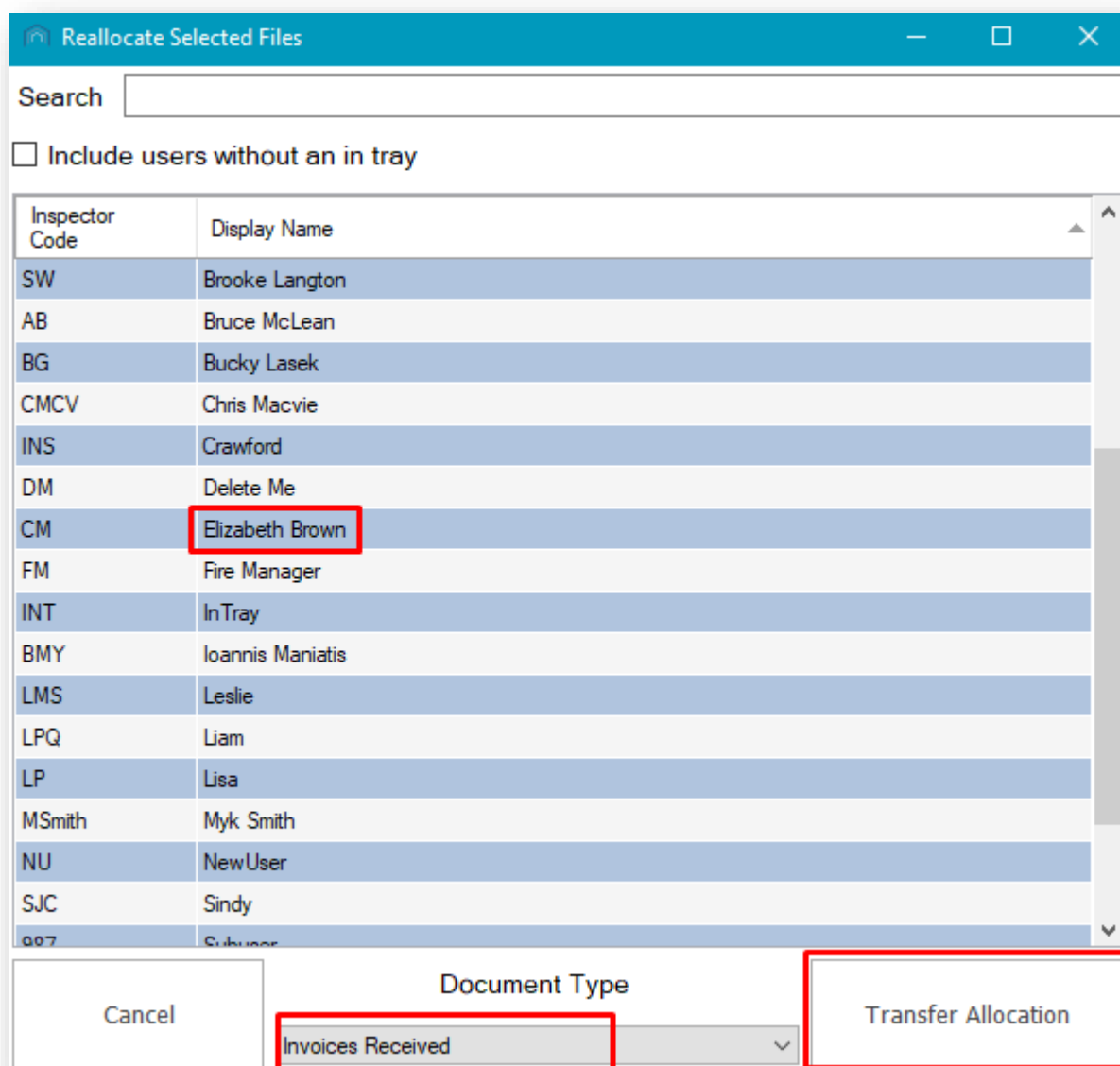
If you think you have received one in error which should go to another user then you can allocate this to them instead.

## REALLOCATING AN INVOICE TO ANOTHER USER

Right-click on the invoice you wish to send to another user and you will see a menu appear.



Click on **Reallocate Selected File** and a screen will appear which will allow you to choose another user.

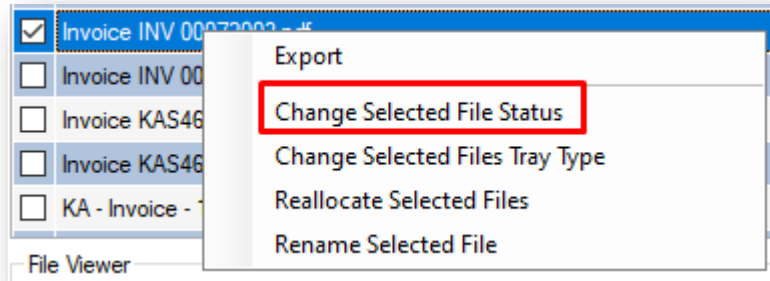


Start to type the name of the user and then click on their name. Make sure the **Document Type** is set for **Invoices Received** and then click on the **Transfer Allocation** button and the invoice will be transferred to the other user's In-Tray.

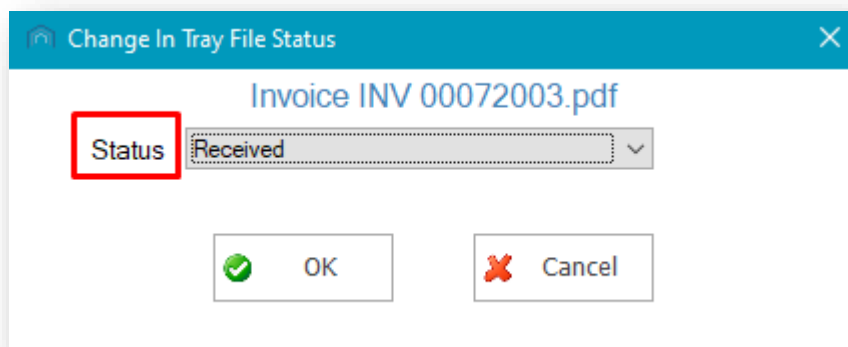
#### INVESTIGATING AND INVOICE WITHOUT IMMEDIATE POSTING

You can choose to take time to investigate and verify an invoice is correct, before posting it into the system. You may want to move the invoice from your **Received** status tray to a **To Do** tray in the meantime.

To do this, right-click on the invoice in question and you will see a menu of options appear.

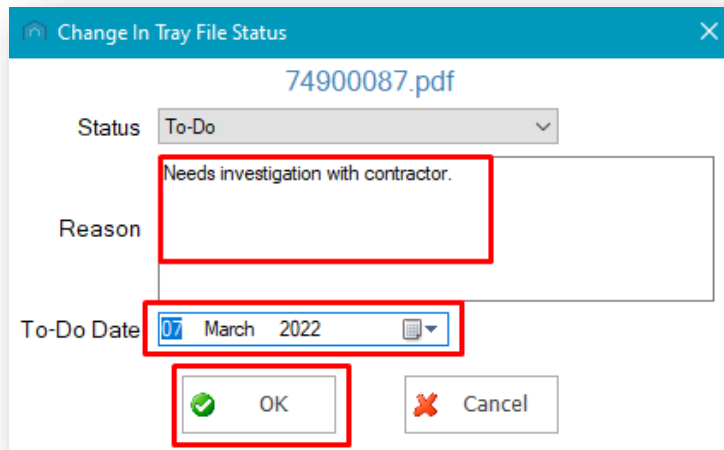


Click on **Change Selected File Status** and another screen will appear.



Click on the **Status** drop-down menu and choose **To Do**.


The screen will change and allow you to type a reason for setting it to this status.



Add a reason, a date when it should be actioned and then click on **OK**. You will see a confirmation screen telling you that the status has been updated.

#### ACCESSING TO DO INVOICES


When you are returning to post this invoice through the system, make sure you change your **Status** tray to **To Do** and you will be able to view any invoices you had set to be investigated before posting through the system.





The invoice can then be posted through the system as per the steps below.



#### POSTING AN INVOICE AGAINST AN INDIVIDUAL JOB

Click to select the relevant Invoice from the In-Tray grid on the right of your screen. You will see a preview of your purchase ledger invoice in the **File Viewer** section below.

Tray: Invoices Received  Post

User: Administrator  Post and Follow Up

Status: Received  Refresh ☐ Auto-Open Record

File	Scanned Date	
<input type="checkbox"/> CPL Cleaning Excel Test Invoice.xlsx	18/02/2021 11:40	
<input checked="" type="checkbox"/> Danny McIntosh PInvoice for 551001.pdf	23/02/2022 14:39	


File Viewer

# INVOICE

**DATE**  
16/02/2022



Danny McIntosh Tree Surgeons  
Glasgow

**EXPIRATION DATE**  
16/03/2022

 **Danny McIntosh Tree Surgeons**  
**Invoice 13309FG**

**TO:** CPL Property Factoring  
GLASGOW OFFICE  
9 Woodside Crescent  
Glasgow  
G3 7UL

If you have established that you are ready to post this invoice into the system, click to place a tick next to the invoice in the tray.


File	Scanned Date	
<input type="checkbox"/> CPL Cleaning Excel Test Invoice.xlsx	18/02/2021 11:40	
<input checked="" type="checkbox"/> Danny McIntosh PInvoice for 551001.pdf	23/02/2022 14:39	

You will need to select the correct record on the left of your In-Tray screen to allow you to post the invoice against this.

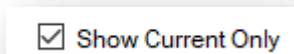
Click on the **Record Type** drop-down menu to select the appropriate record. In this instance, the invoice is from a contractor who carried out a work order from a job which has been raised in the system.



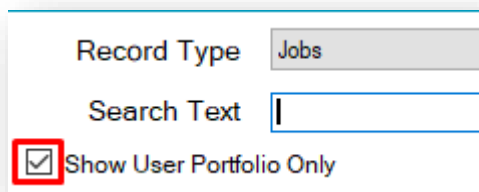
Make sure you select **Jobs** from the **Record Type** menu.



Make sure that the **Show Current Only** box is ticked to allow you to view current jobs in CPL.



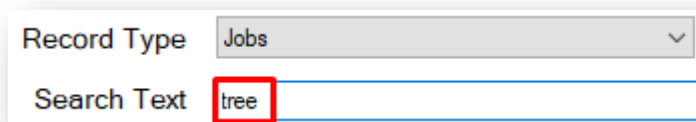
If you are a Property Manager of the Development where the job was carried out, you may find it beneficial to click in the **Show User Portfolio Only** box.



This will allow only jobs for the developments you manage to be displayed.

If you are not a property manager for the development the job is for then leave this unticked.

You can enter text used in the Job Description into the **Search Text** field to allow you to search only for jobs where this is relevant.



If you click at the head of the **Reference** column in the records grid, it will allow the jobs to be ordered by the most recent job order numbers.

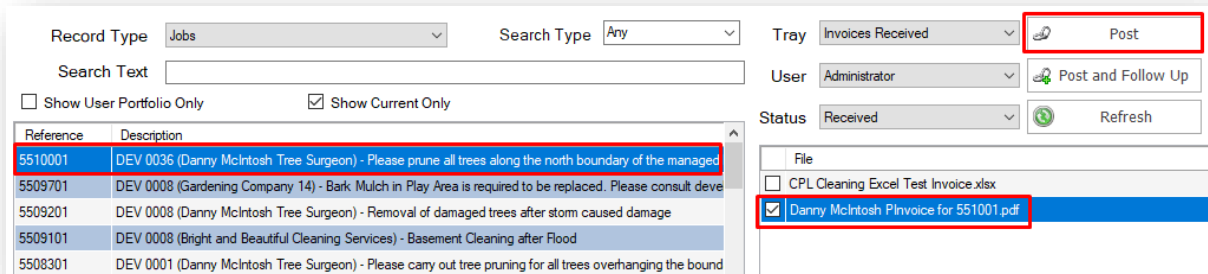
Reference	Description
5510001	DEV 0036 (Danny McIntosh Tree Surgeon) - Please prune all trees along the north boundary of the managed land
5509201	DEV 0008 (Danny McIntosh Tree Surgeon) - Removal of damaged trees after storm caused damage
5508301	DEV 0001 (Danny McIntosh Tree Surgeon) - Please carry out tree pruning for all trees overhanging the boundary

Clicking on the **Reference** column again will arrange the job order numbers from the oldest first.

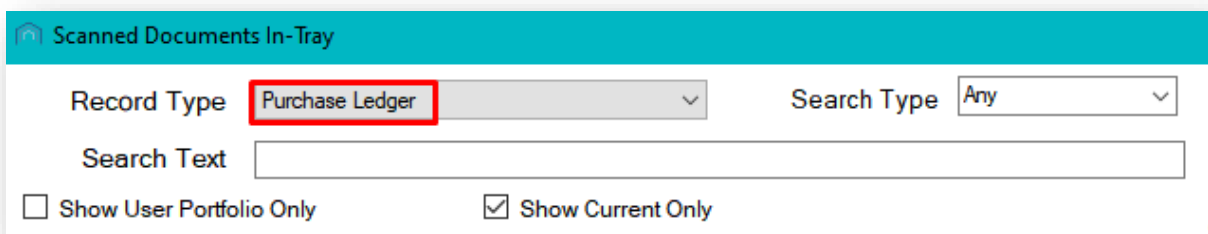
If your contractor has included the **Job Order Number** in their purchase invoice, then this will help you to locate the job in question.

Once you have found the correct job, click to highlight this in the grid.

Making sure that your invoice is still ticked on the right of the screen, with the job highlighted on the left, click on the **Post** button in the top-right of the screen.

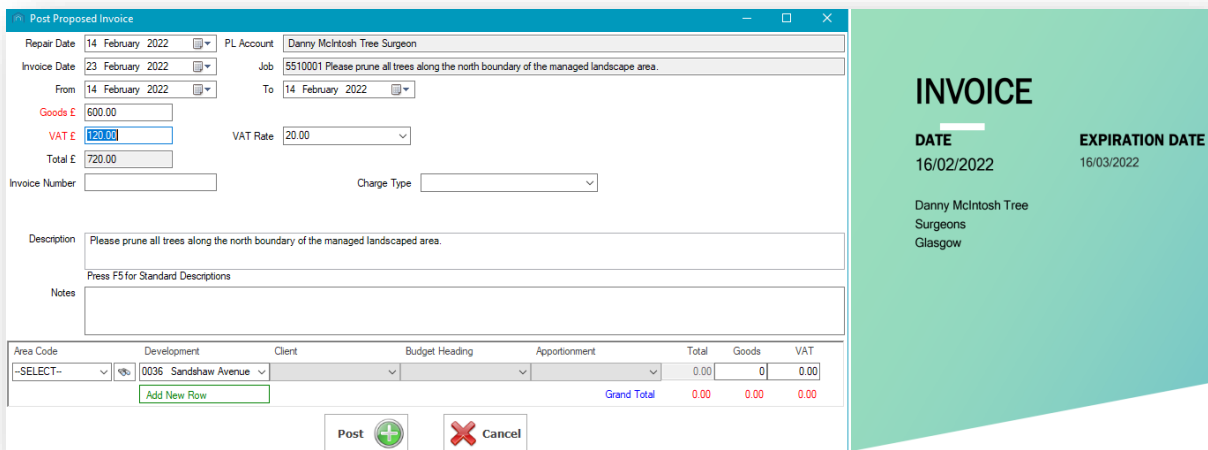


Invoices can also be posted directly against the appropriate Purchase Ledger Account.



## POSTING TO PROPOSED INVOICES

The **Post Proposed Invoice** screen will now open on the left of your screen and the **Invoice file** you are posting will open on the right of your screen.



Some of the fields in your **Post Proposed Invoice** screen may already be populated with the information entered into CPL when the job and work order were created.

Make sure that the **Repair Date** and the **From** and **To** dates are correct and if not you can edit these.

Repair Date	14 February 2022	PL Account	Danny McIntosh Tree Surgeon
Invoice Date	23 February 2022	Job	5510001 Please prune all trees alo
From	14 February 2022	To	14 February 2022

If it's not already there then you can add the appropriate **Goods** amount in the top left of the screen. This will pick up the default VAT settings for this PL Account and calculate the VAT and Total as appropriate. You can change the VAT rate if this is not correct and CPL will recalculate the VAT and Total.

Add the **Invoice Number** to match the one provided on your invoice from the invoice you have received.

Repair Date	14 February 2022
Invoice Date	23 February 2022
From	14 February 2022
Goods £	720.00
VAT £	144.00
Total £	864.00
Invoice Number	13309FG

Set the **Charge Type** as appropriate from the drop-down menu displaying any charge types you are using in the system.

Charge Type	Normal
-------------	--------

*Please note, if you do not see the Charge Types you expect to be able to view in this list, you can raise a ticket with the CPL Support Team to have these added.*

The description entered will be the original description you entered for the work order for your contractor. You can edit this to contain the description you wish your clients to have listed on their invoice.

Description	Tree pruning all north boundary trees.
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You may wish to consider setting up **Standard Descriptions** in your **System Parameters** menu in **CPL** to allow you to quickly select from a menu of pre-prepared descriptions. Once these are set up you can click on **F5** on your computer keyboard to access this menu.

You can use the **Notes** field to add any internal notes that you wish to hold in the system for this invoice. These notes will not be visible to your clients.

In the lower section of the **Post Proposed Invoice** screen, you can make sure that the correct information is present to allow this invoice to be apportioned to the correct client or apportionment.

The Development will already be entered from when you raised the job and if you chose an individual client or selected an apportionment then this will also be brought over from the job details.

Development	Client	Budget Heading	Apportionment
0036 Sandshaw Avenue ▾	▾	▾	1 - All Properties ▾

You can enter a **Budget Heading** if you are posting this invoice to become a charge on a budgeted development.

You can also choose to split your invoice down further by clicking on the **Add New Row** option and dividing the total between the rows if this is appropriate.

Development	Client	Budget Heading	Apportionment	Total	Goods	VAT
0036 Sandshaw Avenue ▾	▾	▾	1 - All Properties ▾	720.00	600.00	120.00
0036 Sandshaw Avenue ▾	00360012 Peter Falconi ▾	▾	▾	144.00	120.00	24.00

If you need to remove a row you have added, this can be achieved by clicking on the red cross to the right of any added row.

0036 Sandshaw Avenue ▾	00360012 Peter Falconi ▾	▾	▾	144.00	120.00	24.00	
------------------------	--------------------------	---	---	--------	--------	-------	---

Make sure you have entered the correct **Goods** amount in the grid to match with the **Goods** total in the field in the top-left section of the screen. This should automatically add the appropriate **Total** and **VAT** amounts. If you have changed these, then add the correct **Goods** amount and click on the **Tab** key on your keyboard to correct the **Total** and **VAT** amounts.

When your totals show in blue on the screen, they match the totals in the top-left of the screen and you are ready to post your invoice through into the system.



Grand Total	864.00	720.00	144.00
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If your totals are showing in red then you will need to edit them as they don't match the totals above and you will need to correct them before being able to proceed to post your invoice.

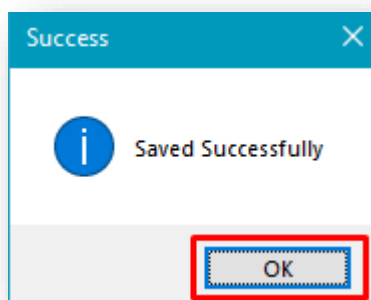
Grand Total	852.00	710.00	142.00
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Once you are happy that you have entered everything correctly on the **Post Proposed Invoice** screen, click on the **Post** button in the middle at the bottom of the screen.

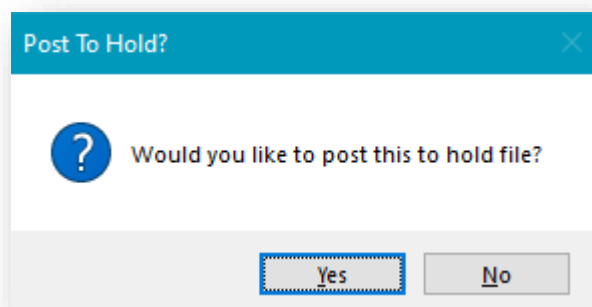
Development	Client	Budget Heading	Apportionment	Total	Goods	VAT
0036 Sandshaw Avenue			1 - All Properties	864.00	720.00	144.00
Add New Row				Grand Total	864.00	720.00 144.00

**Post** 
 **Cancel**

You will be presented with a **Success** window to inform you that your invoice has been saved to the Proposed Invoices tab in CPL. Clicking on **OK** will dismiss this message.



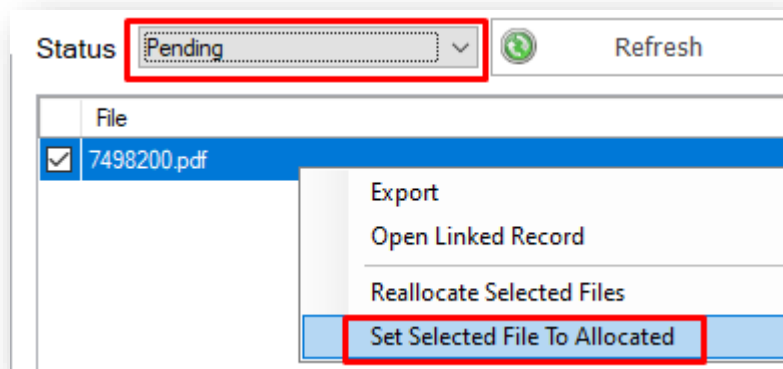
If you have the required level of permissions, you will then be presented with a **Post To Hold File** window option.



If you wish to post the invoice through to the Proposed Invoices tab in CPL to be checked by another user (for example a property manager) click on **No**.

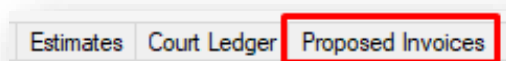
### POST AND FOLLOW UP OPTION

Please note that the **Post and Follow Up** option in In-Tray will post the invoice against the job into CPL, but will leave this in your **Pending** status invoice tray if you would like a reminder to follow something up later. If you have done this, then once you have followed it up you can right-click on this invoice and choose to **Set Selected File to Allocated** and it will no longer display in your In-Tray.



### ACCESSING YOUR PROPOSED INVOICES

Click on the **Proposed Invoices** tab in CPL to locate invoices waiting to be accepted and posted to the Hold File.



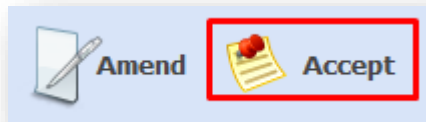
From this main tab in CPL, invoices can be viewed, accepted, amended or deleted by a user with the correct access privileges prior to being processed on to the Hold File to enable purchase ledger

accounts to receive payment and to enable the appropriate charges to be applied against your client accounts.

Use the search filter fields at the bottom of the screen to help you locate an invoice or group of invoices you would like to accept.

Once you have set your search criteria to display the appropriate invoices in the grid on the **Proposed Invoices** tab, clicking to highlight an individual invoice will display the invoice details on the pin panel on the right of the screen.

If this is enough information for you to decide to proceed, then you have the option to click on the **Accept** icon located in the action bar beneath the grid.



If you wish to view the invoice in its own window or edit any of the details entered at the previous stage of the process from the In-Tray, you can double-click on the invoice in the grid, or click to highlight it and click on the **Amend** icon located in the action bar beneath the grid.

Either method will open the individual **Proposed Invoice** for you.

**Proposed Invoice**

Save Close

<b>Invoice Number</b>	13309FG	<b>Contractor</b>	Danny McIntosh Tree Surgeon
<b>Invoice Date</b>	23/02/2022	<b>Goods Amount</b>	720.00
<b>Job Order Number</b>	5510001	<b>VAT Amount</b>	144.00
<b>Repair Date</b>	14/02/2022	<b>Job Type</b>	Tree Surgeon
<b>From Date</b>	14/02/2022	<b>Status</b>	Submitted
<b>To Date</b>	14/02/2022	<b>User Created</b>	Administrator

Proposed Invoice Documents Comments

**Proposed Invoice**

Invoice Number: 13309FG Contractor: 1090 Danny McIntosh Tree St

Invoice Date: 23/02/2022 Goods Amount: 720.00

Job Order No: 5510001 VAT Rate (%): 20.00

Repair Date: 14/02/2022 VAT Amount: 144.00

From Date: 14/02/2022 Job Type: TR Tree Surgeon

To Date: 14/02/2022 Description: Tree pruning all north boundary trees.

Status: Submitted

Charge type: Normal

Notes: Press F5 for Standard Descriptions

Area Code	Development	Client	Budget Heading	Apportionment	Total	Goods	VAT
-SELECT-	0036 Sandshaw Av			1 - All Properties	864.00	720.00	144.00
Grand Total					864.00	720.00	144.00

Edit Details Accept Invoice Delete Invoice View Invoice

The invoice will appear with the information added when it was processed through from the In-Tray.

You can click on the **View Invoice** icon in the action bar at the bottom of the screen to view the original invoice from the purchase ledger account which has been submitted for payment.

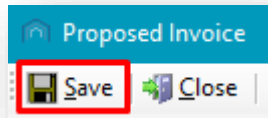
Edit Details Accept Invoice Delete Invoice View Invoice

The invoice will be displayed on the screen alongside your **Proposed Invoice** window.

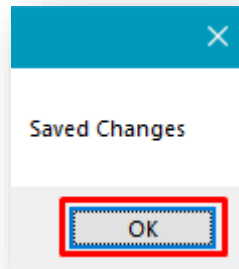
If you wish to edit any of the details added, click on the **Edit Details** icon in the action bar at the bottom of the screen and all fields will now be available for you to edit if you wish.

If you do edit any details, make sure you click on **Save** at the top-left of the window when you have finished.

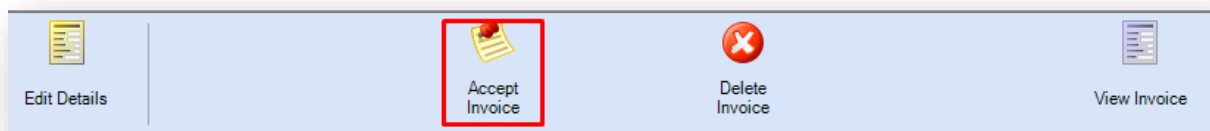




Your changes will have been saved and you will be presented with a **Saved Changes** confirmation message. Clicking on **OK** will dismiss this message and you will be back on your **Proposed Invoice** screen.

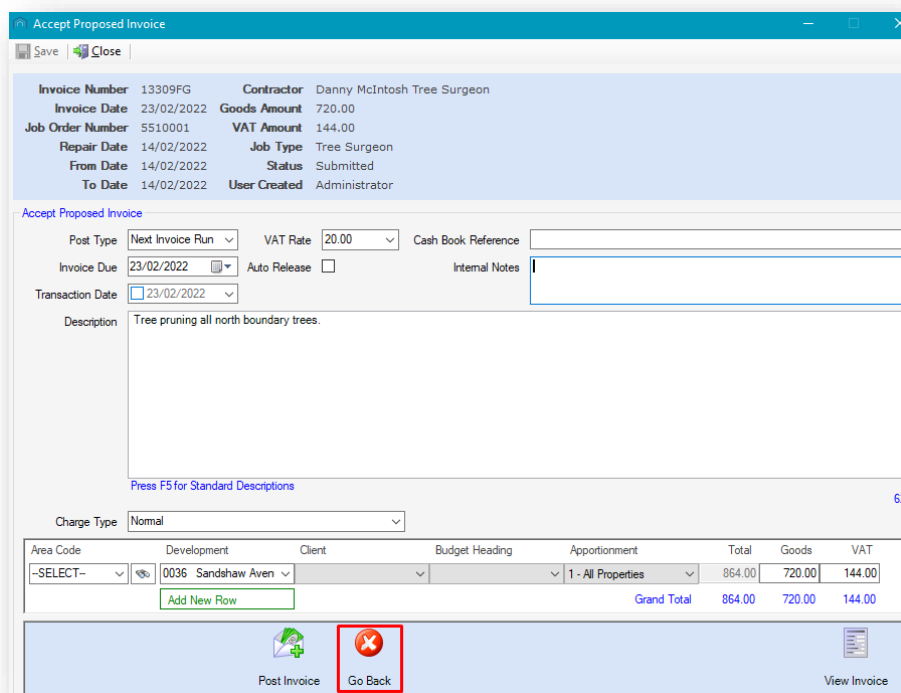


If you are ready to accept the invoice at this point, you can click on the **Accept Invoice** icon in the action bar at the bottom of the window.



### ACCEPTING YOUR PROPOSED INVOICE

The **Accept Proposed Invoice** screen will open, displaying all of the options from your previous screen. This will allow you to have a final check on the details being posted from the contractor invoice. You will be taken directly to this screen if you clicked **Accept** from the action bar in the main **Proposed Invoices** tab.



**Accept Proposed Invoice**

Save Close

Invoice Number: 13309FG Contractor: Danny McIntosh Tree Surgeon  
 Invoice Date: 23/02/2022 Goods Amount: 720.00  
 Job Order Number: 5510001 VAT Amount: 144.00  
 Repair Date: 14/02/2022 Job Type: Tree Surgeon  
 From Date: 14/02/2022 Status: Submitted  
 To Date: 14/02/2022 User Created: Administrator

Accept Proposed Invoice

Post Type: Next Invoice Run VAT Rate: 20.00 Cash Book Reference:   
 Invoice Due: 23/02/2022 Auto Release: ☐ Internal Notes:   
 Transaction Date: 23/02/2022 Description: Tree pruning all north boundary trees.  
 Press F5 for Standard Descriptions

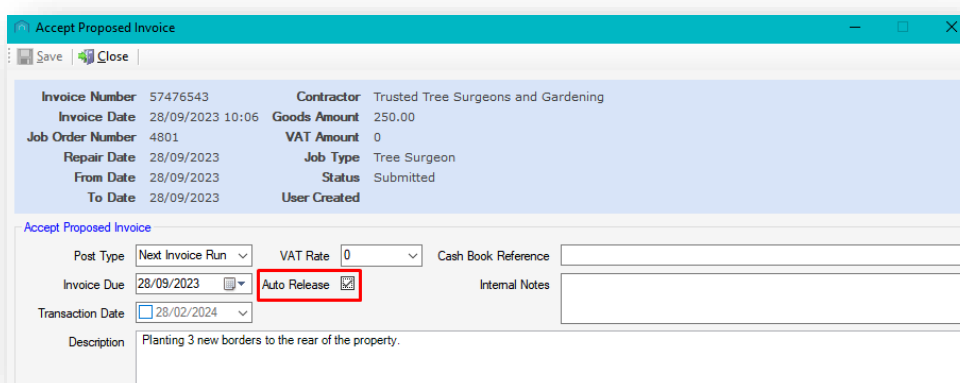
Charge Type: Normal

Area Code	Development	Client	Budget Heading	Apportionment	Total	Goods	VAT
--SELECT--	0036 Sandshaw Aven			1 - All Properties	864.00	720.00	144.00
Grand Total					864.00	720.00	144.00

Post Invoice Go Back View Invoice

If you notice something which needs to be rectified, you can click on the **Go Back** icon in the action bar at the bottom of the screen. This will take you to the previous **Proposed Invoice** screen where you can make further changes and then click to accept the invoice when you are ready.

You may have a system option set in your database which will already have ticked the Auto Release option in this screen. This will mean that the invoice will be marked as released when it is posted through to the Hold File.



**Accept Proposed Invoice**

Save Close

Invoice Number: 57476543 Contractor: Trusted Tree Surgeons and Gardening  
 Invoice Date: 28/09/2023 10:06 Goods Amount: 250.00  
 Job Order Number: 4801 VAT Amount: 0  
 Repair Date: 28/09/2023 Job Type: Tree Surgeon  
 From Date: 28/09/2023 Status: Submitted  
 To Date: 28/09/2023 User Created:

Accept Proposed Invoice

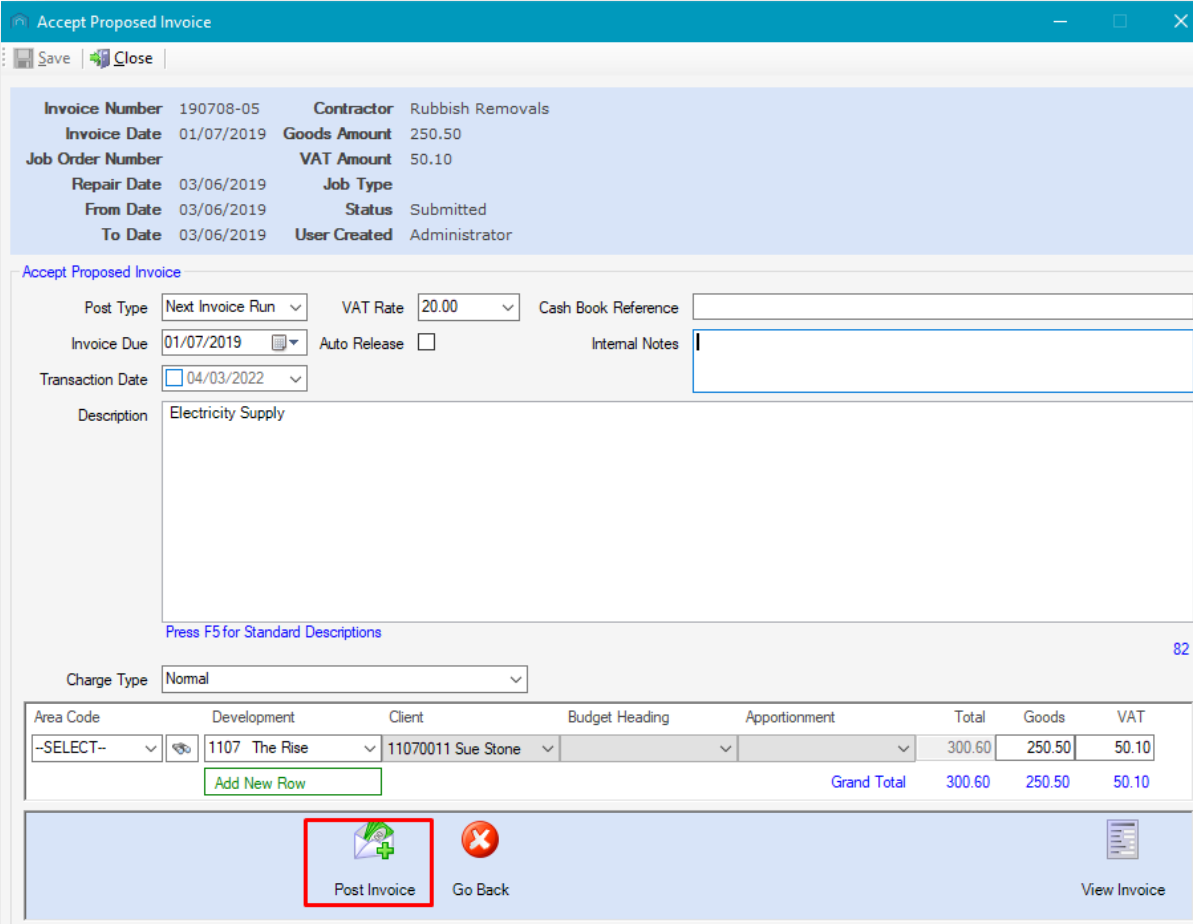
Post Type: Next Invoice Run VAT Rate: 0 Cash Book Reference:   
 Invoice Due: 28/09/2023 Auto Release: ☒ Internal Notes:   
 Transaction Date: 28/02/2024 Description: Planting 3 new borders to the rear of the property.

If this is not ticked and you wish the invoice to be marked as released when it is posted to the Hold File, since it has already been checked, then you can tick this option.

If you are ready to accept your invoice you can do this from the **Accept Proposed Invoice** screen.

## POSTING YOUR INVOICE

When the **Accept Proposed Invoice** screen opens, you can have one last check that you are ready to proceed.



**Accept Proposed Invoice**

Save Close

Invoice Number	190708-05	Contractor	Rubbish Removals
Invoice Date	01/07/2019	Goods Amount	250.50
Job Order Number		VAT Amount	50.10
Repair Date	03/06/2019	Job Type	
From Date	03/06/2019	Status	Submitted
To Date	03/06/2019	User Created	Administrator

**Accept Proposed Invoice**

Post Type: Next Invoice Run VAT Rate: 20.00 Cash Book Reference:

Invoice Due: 01/07/2019 Auto Release: ☐ Internal Notes:

Transaction Date: 04/03/2022

Description: Electricity Supply


Press F5 for Standard Descriptions

Charge Type: Normal

Area Code	Development	Client	Budget Heading	Apportionment	Total	Goods	VAT
-SELECT-	1107 The Rise	11070011 Sue Stone			300.60	250.50	50.10
Grand Total					300.60	250.50	50.10

Post Invoice Go Back View Invoice

When you are ready, click on the **Post Invoice** icon in the action bar across the bottom of the screen to post it through to the Hold File.

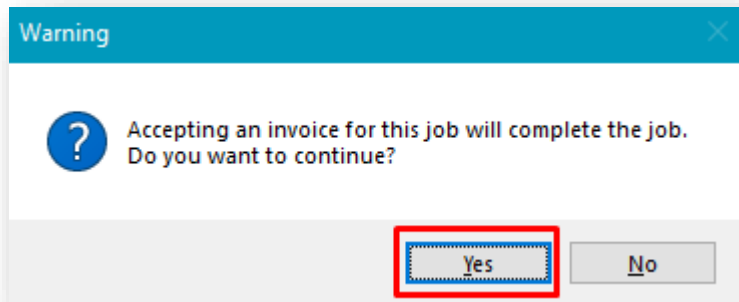


Post Invoice Go Back View Invoice

## MARKING THE JOB AS COMPLETED

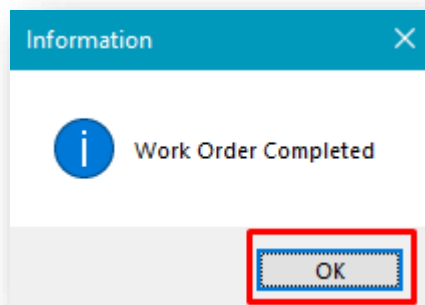
If your invoice is being posted against a current job in the system, which has not already been marked as completed then, at this point, you will get the option to complete the job.

You will see a pop-up **Warning** message.

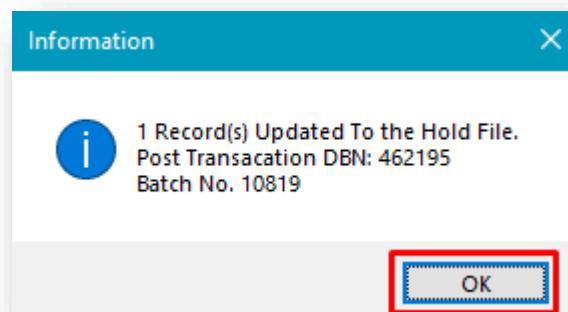


Clicking on **Yes** will allow you to mark the job as completed since the work has been carried out and you have received the invoice from the contractor.

You will receive an **Information** pop-up message informing you that the work order has been marked as completed. Clicking on **OK** will dismiss this message.



You will receive another **Information** pop-up message informing you that a record has been updated to the Hold File. You will be given the day book and batch number for this invoice posting. Clicking on **OK** will dismiss this message.



Your invoice has now been posted through to the Hold File ready to appear on the PL Payments screen and to be processed to the Client Charge File.

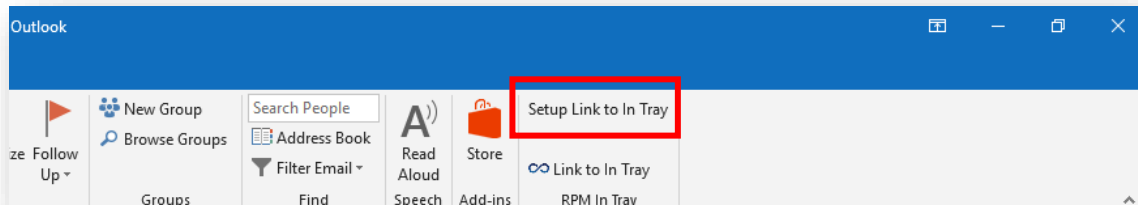
## USING THE OUTLOOK ADD-IN

### CONFIGURING THE OUTLOOK ADD-IN

*The screenshots below have been taken using Outlook 2019. Please be aware that if you have a different version these may appear slightly differently.*

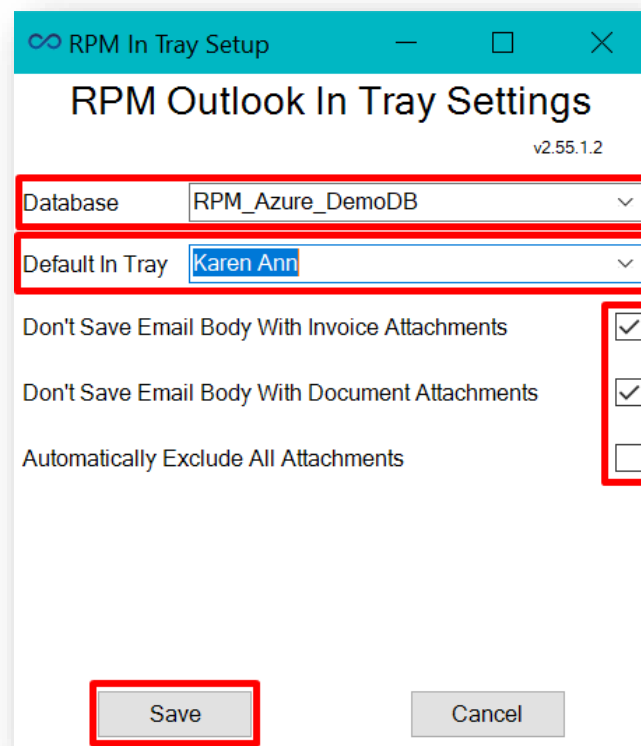
Once the Add-in has been installed you can make some configurations within Outlook itself.

Open Outlook and on the **Home** tab you should see the **RPM In-Tray** menu is now in the menu bar/ ribbon.



Select the **Home** tab in Outlook and click on the **Setup Link to In Tray** option in the menu bar.

This will open the **RPM Outlook In Tray Settings** window:



Using the drop-down menus, select the **Database** as **RPM** if it is not already selected and the **Default In Tray** as your own username in CPL.

In this window, there are also three tick box options available.

These are:

- **Don't Save Email Body With Invoice Attachments**
- **Don't save Email Body With Document Attachments**
- **Automatically Exclude All Attachments**

These options govern what you are transferring through to CPL using the Add-in. You can choose whether you are saving only the documents/ invoices attached to your email or both the email and the attached documents. You can also choose not to save any attachments at all.

You may wish to speak with your local IT services representative or your management team about these settings as they can affect your data storage.

Use the tick boxes to make your selections and click the **Save** button.

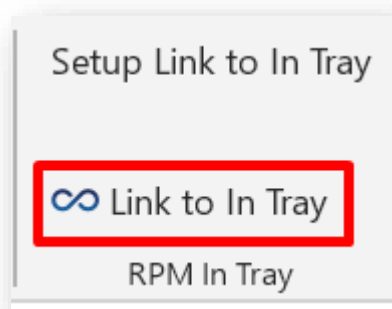
Upon saving, your choices will become the default settings for your In-Tray Add-in. However, they are easily modified by clicking the **Setup Link to In Tray** option, which will open the settings window again and allow you to adjust as required. Remember to click **save** to implement any subsequent changes.

## USING THE OUTLOOK ADD-IN

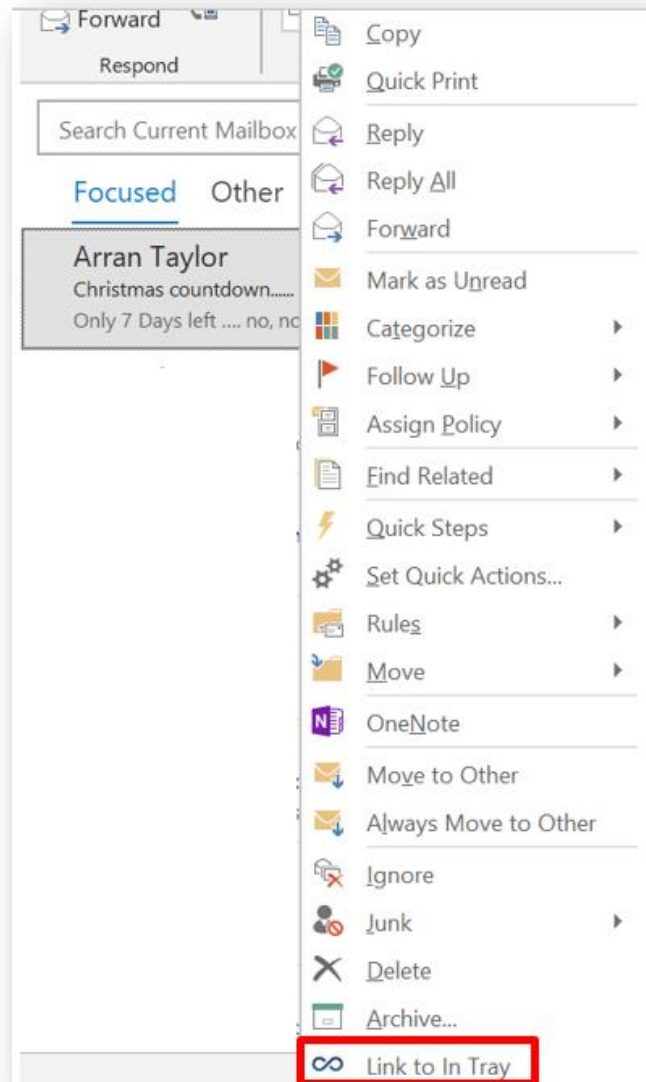
### LINKING AN INVOICE FROM OUTLOOK TO IN-TRAY

Having installed the add-in and completed the set-up, you can get started with sending invoices from Outlook to the In-Tray module.

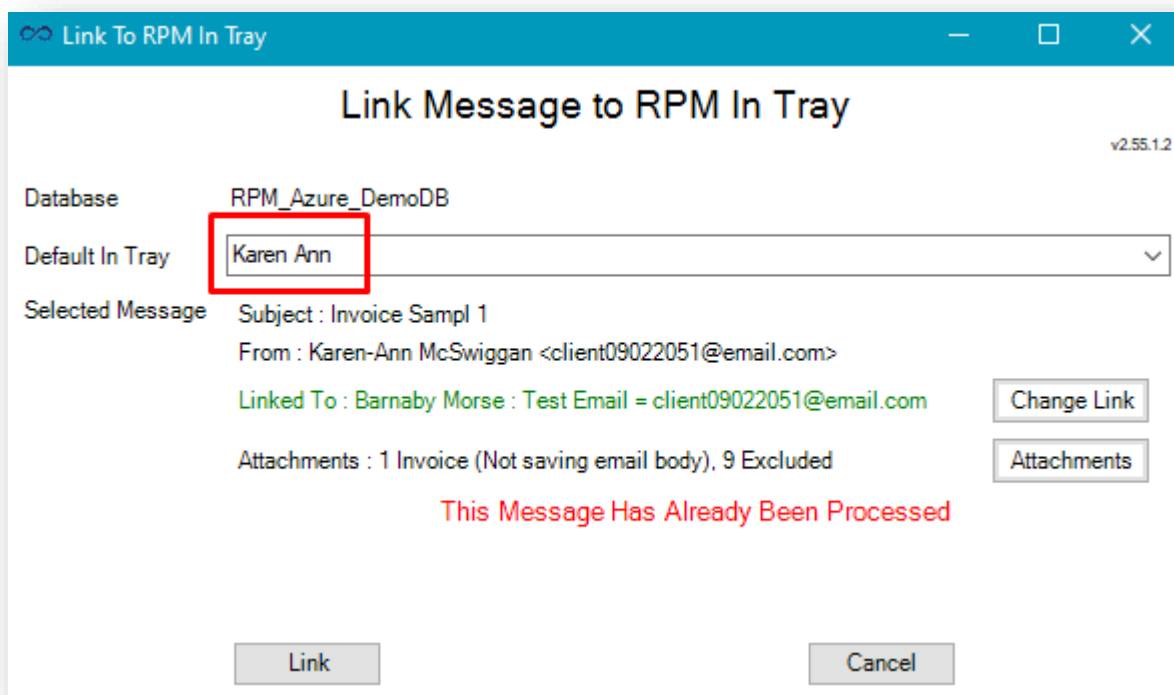
You can select an email in Outlook that has an invoice attached you wish to send to the In-Tray module in CPL. While this email is selected, click the **Link to In Tray** option (with the CPL logo next to it) in the Outlook Menu Bar.



Alternatively, right-clicking on this email will display your Outlook menu with a **Link to In Tray** option at the bottom of the drop-down list.



Using either of these methods will result in you being presented with the **Link To RPM In Tray** window.



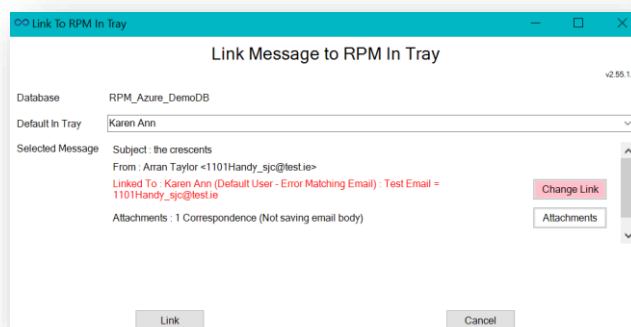
In the **Default In Tray** section you can click on the drop-down menu to select a different user in CPL you would like to receive the invoice.

Clicking the **Change Link** button will also allow you to do this for each individual email you are dealing with. There is more comprehensive information on this in the In-Tray Training Guide available in the CPL Knowledge Base.

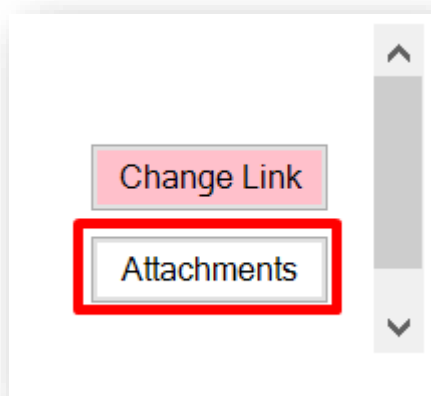
#### CHANGING ATTACHMENT SELECTION.

On the **Link Message to RPM In Tray** screen there is also an option which allows for further customisation in linking your documents by deciding which attachments from an email you would like to link.

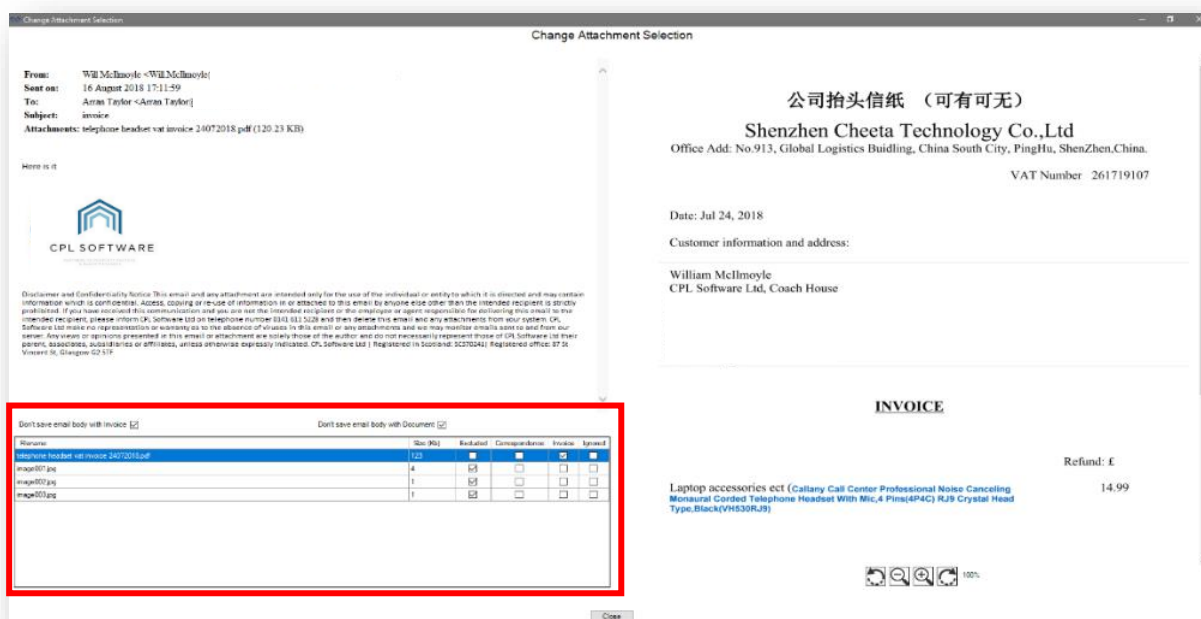
To change the documentation being forwarded to the **CPL In-Tray** system, click the **Attachments** button on the **Link Message to RPM In Tray** window.







This will open the **Change Attachment Selection** window. This screen allows you to select which attachments you are linking through to the In-Tray.



When the **Change Attachment Selection** window opens, you will be presented with a preview of the original email (on the left), and the selected attachment or attachments (on the right).

In the bottom left-hand corner, you will find a grid with options available to you.

Don't save email body with Invoice ☒

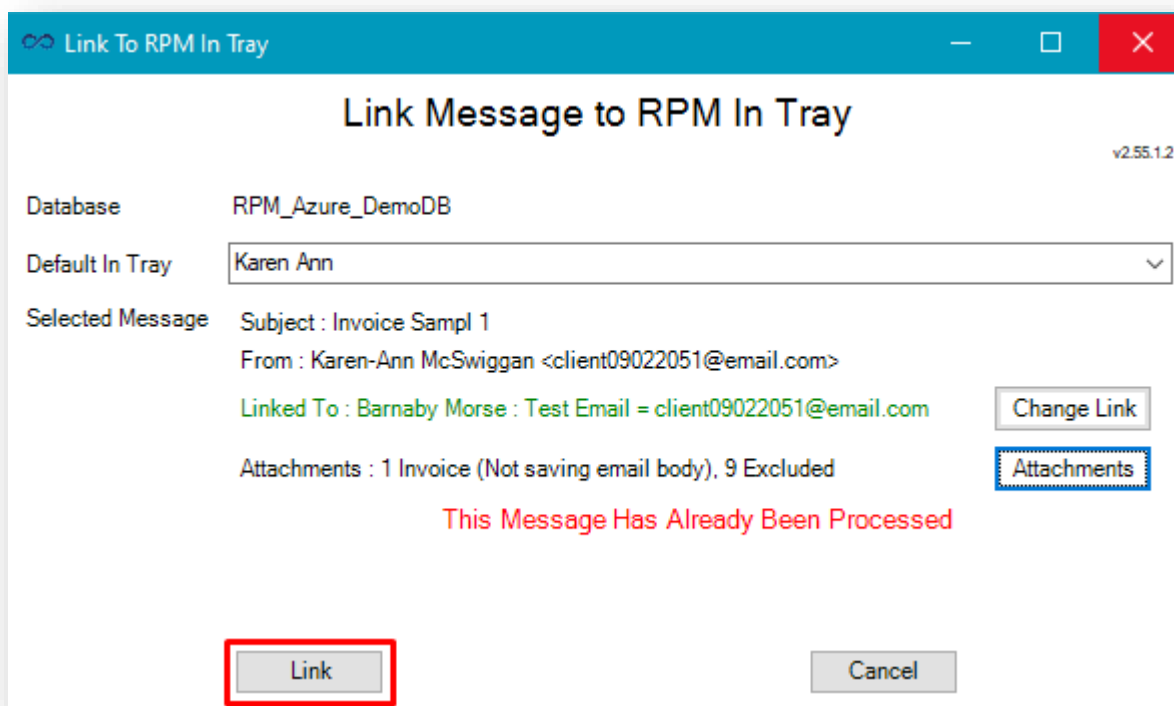
Don't save email body with Document ☒

- Make sure **Invoice** is ticked for any invoices you want to link through

Make sure any attachments you don't need such as logos from the contractor or supplier are marked as **Excluded** so that these do not come through as files into the PM's In-Trays.

Click on **Close** when you have made your selections.

You will be back on the **Link Message to RPM In Tray** screen where you can click on the **Link** button.



Link To RPM In Tray

Link Message to RPM In Tray v2.55.1.2

Database RPM\_Azure\_DemoDB

Default In Tray Karen Ann

Selected Message

Subject : Invoice Sampl 1

From : Karen-Ann McSwiggan <client09022051@email.com>

Linked To : Barnaby Morse : Test Email = client09022051@email.com

Attachments : 1 Invoice (Not saving email body), 9 Excluded

Change Link

Attachments

This Message Has Already Been Processed

Link Cancel

The invoice will now be added to the In-Tray for the user selected and it will be ready to be processed through to the Proposed Invoices screen for you to be accepted and posted to the Hold File.

## CPL KNOWLEDGE BASE

This training guide will form part of CPL's Knowledge Base. This 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@cplsoftware.com](mailto:support@cplsoftware.com) or through our Support Portal at <https://contact.cplsoftware.com/portal/home> or calling us on 0345 646 0240 (option 1).