



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

WORKING WITH CONTRACTORS WHO ARE USING BLOCKWORX

AUG 2020

Version 1.0



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INTRODUCTION

This Guide will assist you with getting the best from working with your contractors who are using Blockworx.

Please make sure that the correct people in your organisation have access to this Helpsheet to enable them to link contractors to CPL and work more effectively with estimates, jobs and invoices.

In order to be able to work effectively in CPL with your contractors who are making use of Blockworx, they will need to request to link with you and you will need to link them to their PL Account.

There is a new **Blockworx Contractor Link Requests** card which you will be able to add to your CPL Dashboard and you will find information on this below, including a permission required to allow users to add this card to their Dashboard.

Please ensure that there is an existing PL Account for you to link each contractor to.

You will also benefit from making sure you do not have toaster popup notifications disabled in CPL.

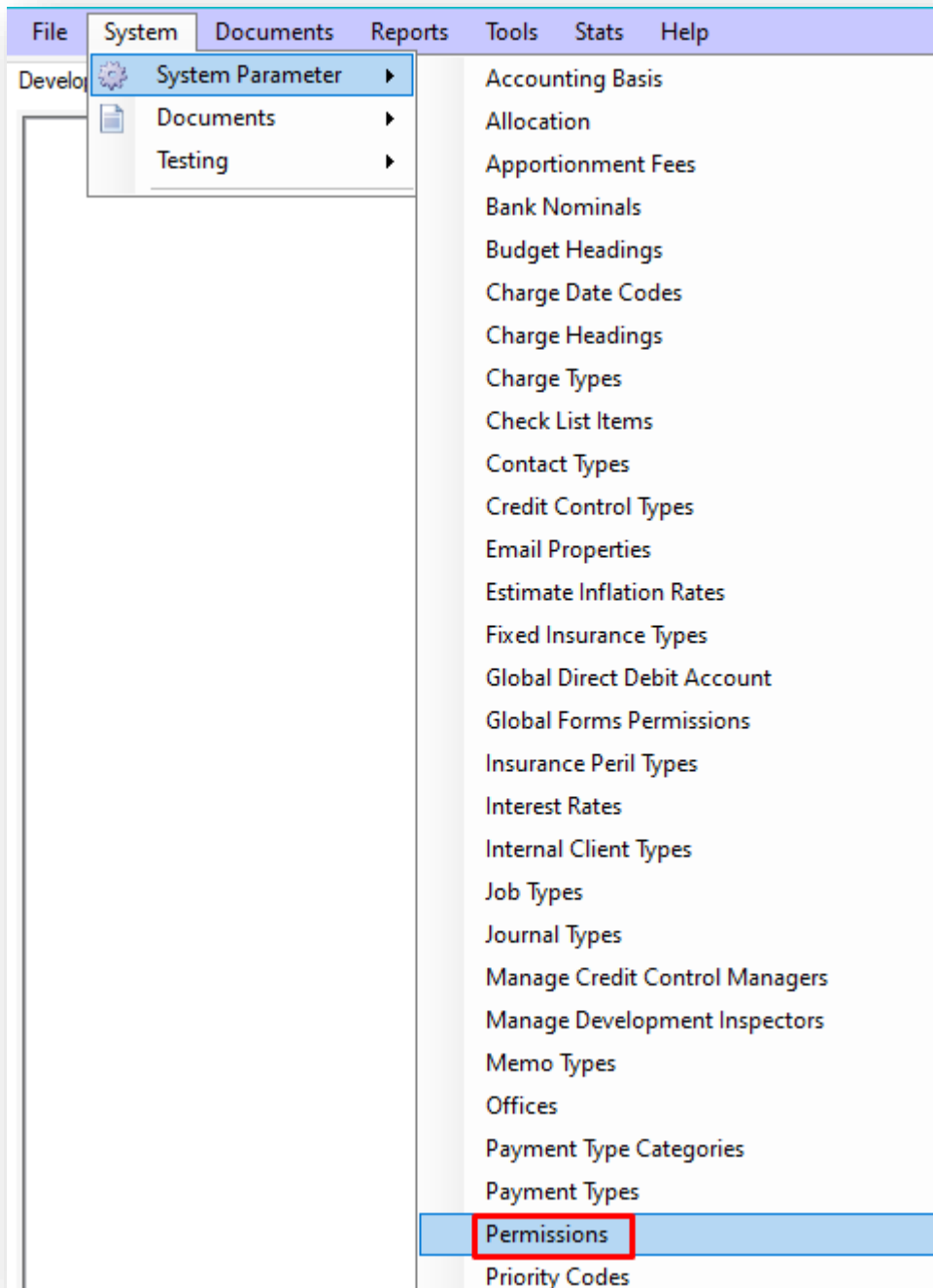
SETTING PERMISSIONS FOR A USER TO ACCESS THE BLOCKWORX CONTRACTOR LINK REQUESTS DASHBOARD CARD

If the CPL user is a Superuser then you will not have to set permissions to enable them to turn the new Dashboard card on.

If they are not a superuser then you will need to set a permission for them.

This permission is called **DashboardBlockworxLinkRequests**.

Click on **System** in the top menu bar in the main CPL screen. Once you have clicked on **System**, select **System Parameter** from the drop-down menu which appears. This reveals another drop-down menu. Scroll through this menu until you see the **Permissions** option and click to select this.



When the **Permissions** screen opens, select the individual **Permission** field and scroll until you find the **DashboardBlockworxLinkRequests** permission. Click on the **Search** icon.


Permissions Filter

User:

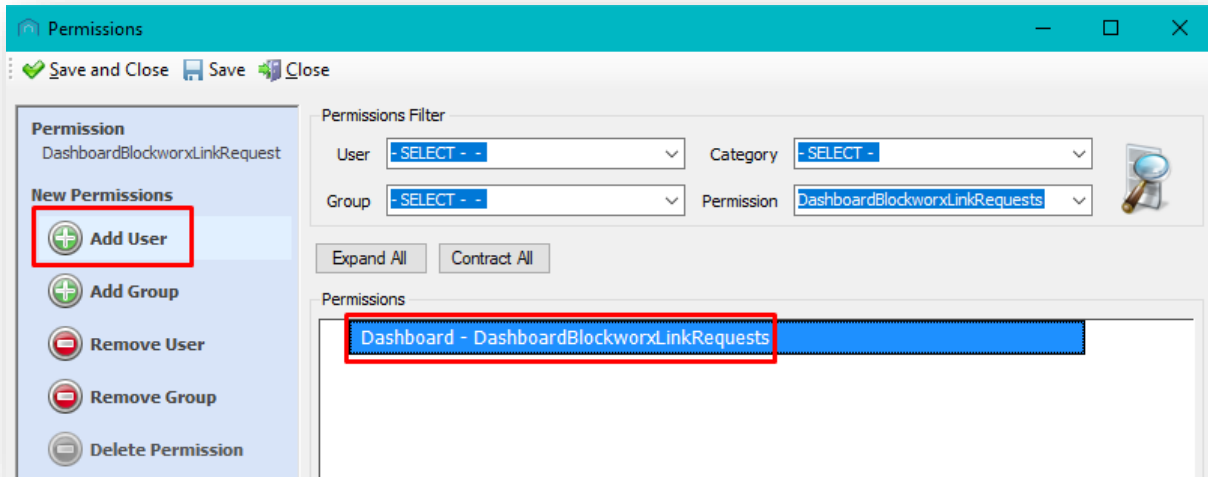
Category:

Group:

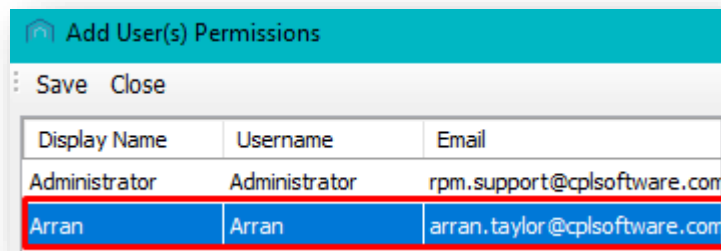
Permission:



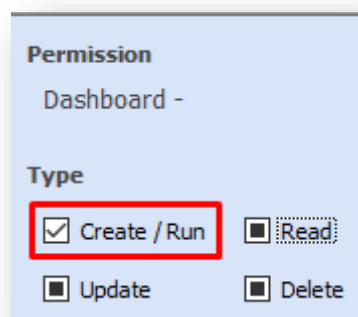
Click to highlight the permission in the grid and on the left of the screen click on **Add User**



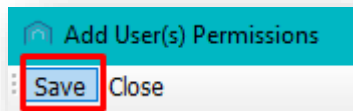
This will open the **Add User(s) Permissions** screen where you can click to select a user in the grid.



Once you have selected the user you will need to use the Permission **Type** tickboxes to set the correct level of permission. On the right of the window where the permission types are located, click twice to place a tick in the **Create/Run** type.



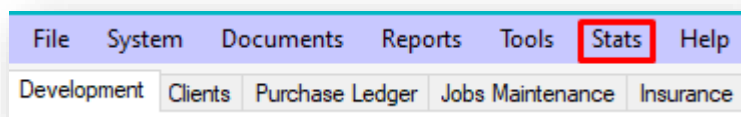
Click on **Save** in the top-left of the window to save this.



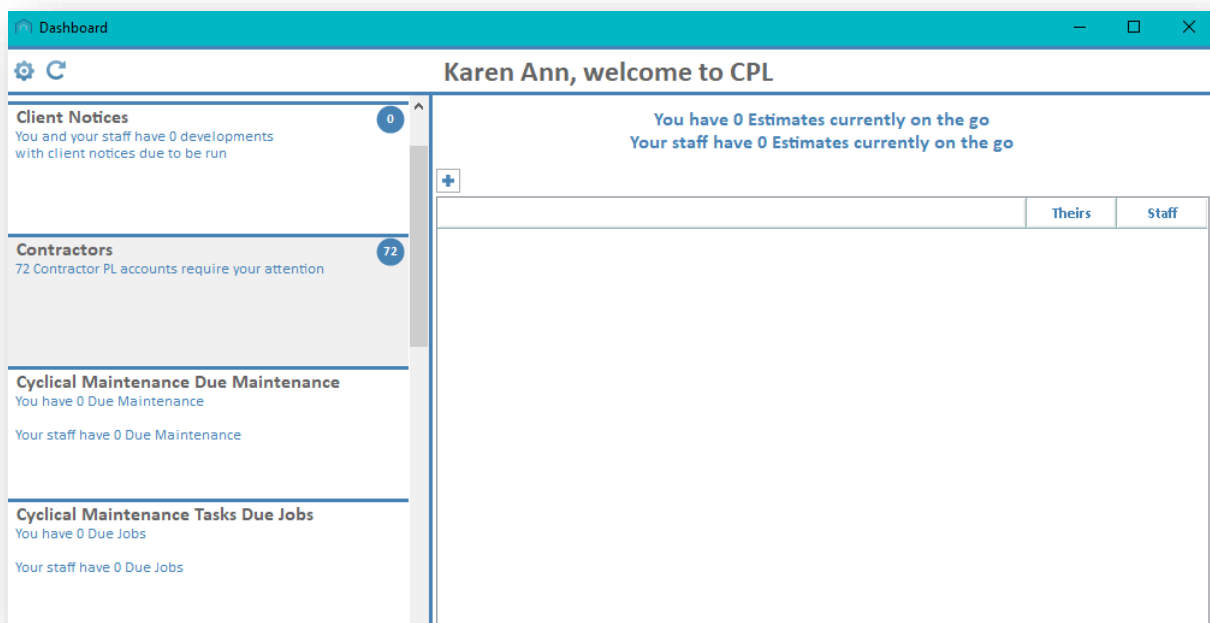
ADDING THE BLOCKWORX CONTRACTOR LINK REQUESTS CARD TO THE DASHBOARD

To add this card to your Dashboard please make sure you have the Dashboard opened in CPL.

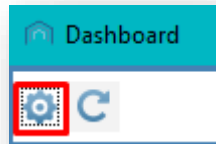
If the Dashboard is not already opened then click on the **Stats** option in the header menu of the CPL screen.



This will open the CPL Dashboard.



If you do not already have the **Blockworx Contractor Link Requests** card on your Dashboard then click on the settings cog icon towards the top-left in order to add this.



This will open the **Dashboard Settings** window.

Dashboard Settings

Dashboard Module	Active	Include Subordinates
Blockworx Contractor Link Requests	<input type="checkbox"/>	<input type="checkbox"/>
Jobs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estimates	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Unresolved Insurance Claims	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Warranties For Retender	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client Notices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contractors	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cyclical Maintenance	<input type="checkbox"/>	<input type="checkbox"/>
Cyclical Maintenance Tasks	<input type="checkbox"/>	<input type="checkbox"/>
Hold Files	<input type="checkbox"/>	<input type="checkbox"/>
In Tray	<input type="checkbox"/>	<input type="checkbox"/>
Overdue Development Warranty Dates	<input type="checkbox"/>	<input type="checkbox"/>
Development Warranty Dates	<input type="checkbox"/>	<input type="checkbox"/>
Expiring Warranties	<input type="checkbox"/>	<input type="checkbox"/>
Pending Direct Debit Setups	<input type="checkbox"/>	<input type="checkbox"/>
Proposed Invoices	<input type="checkbox"/>	<input type="checkbox"/>
Summary	<input type="checkbox"/>	<input type="checkbox"/>

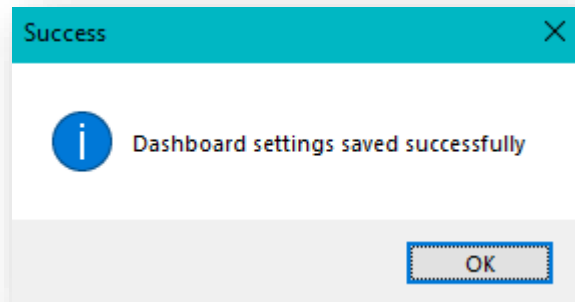
↑

↓

✓

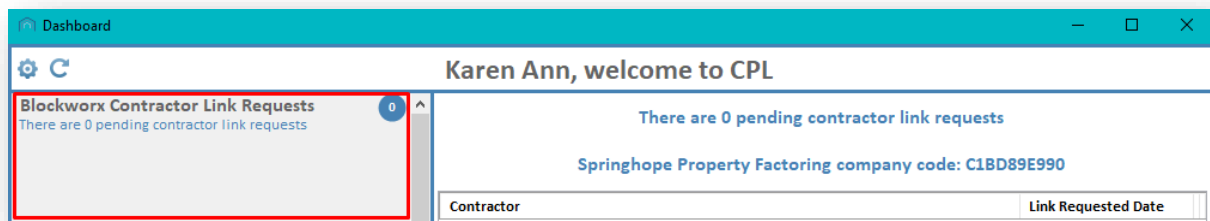
Click to place a tick in the **Active** column for **Blockworx Contractor Link Requests** and then click on the green tick to implement this setting.

You will see a pop-up message confirming that your settings have been saved successfully.



Click on **OK** to dismiss this message.

The new card will now be added to your Dashboard.



This Dashboard card will list your **Company Code**. You will need to distribute this code to any contractors who you want to be able to use Blockworx to link with you as they will need to enter this into Blockworx in order to request the link up.

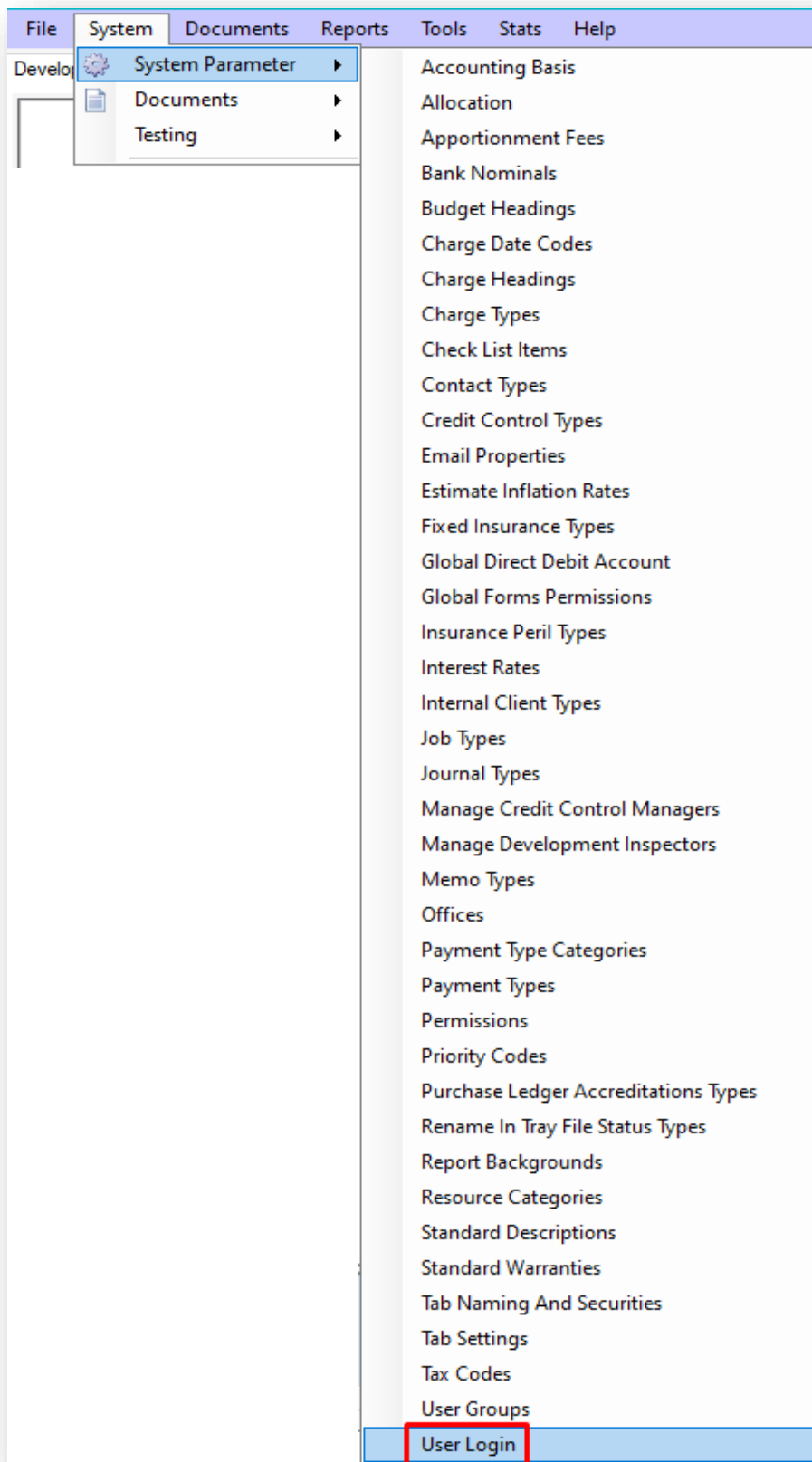
NOTIFICATIONS

In addition to having the permission to allow the Dashboard card to be added, the user would also benefit from receiving the toaster pop-up notifications. This will enable them to be alerted when they receive comments from the contractor.




Being able to see these notifications would depend upon them not being disabled on the **Amend User** screen for this user.

In order to check that notifications are not disabled for a user, access their **Amend User** screen.

From the menu bar at the top of the CPL screen select **System, System Parameter** and scroll down to select **User Login**.



This will open the **User Logins** screen, containing a list of the users in CPL.

User Logins								
System Parameters Details <input type="checkbox"/> Show Deleted Users								
	User Name	Display Name	Inspector Code	Change Password	Deleted	Initial Main Tab	Initial Sub Tab	Is Property Manager
	Leslie	Leslie	LMS	False	False	tabClient	Account	False
	LisaPiper	Lisa	LP	False	False	ClientPortfolios		True
	FireMgr	Fire Manager	FM	False	False	ClientPortfolios		True
	Liam	Liam	LPQ	False	False	tabClient	Account	True
	Crawford	Crawford	INS	False	False	ClientPortfolios		True
	BrianJones	Brian Jones	BJ	False	False	tbDevelopment	Master	True
	Sindy	Sindy	SJC	False	False	tbDevelopment	Memo	False
	Contractor	Contractor	Contractor	False	False	tbPurchaseLedger	PurchaseAccountInfo...	False
	Arran	Arran	AT	False	False	ClientPortfolios		True
	DemoUser	DemoUser	demo	False	False	tbPurchaseLedger	PurchaseAccountInfo...	True
	KarenAnn	Karen Ann	KA	False	False	ClientPortfolios		True
	Administrator	Administrator		True	False	tbDevelopment	Master	True
	Brian	Brian	BW	False	False	ClientPortfolios		True

Locate the individual user on this screen and double-click to open their **Amend User** screen.

Amend User

Save and Close Close

User Logins

User Name [Add Profile Picture](#)

Password

Display Name

Inspector Code

Email ID BCC Email ID

SMTP User Name * User will need to restart RPM for changes to take effect Supervisors

SMTP Password

DDI Number

Signature Path

Job Title

In Tray Directory

QR Printer Name

Security

Available Groups

Selected Groups

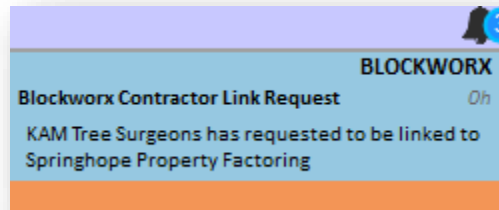
Initial Main Tab

Initial Sub Tab

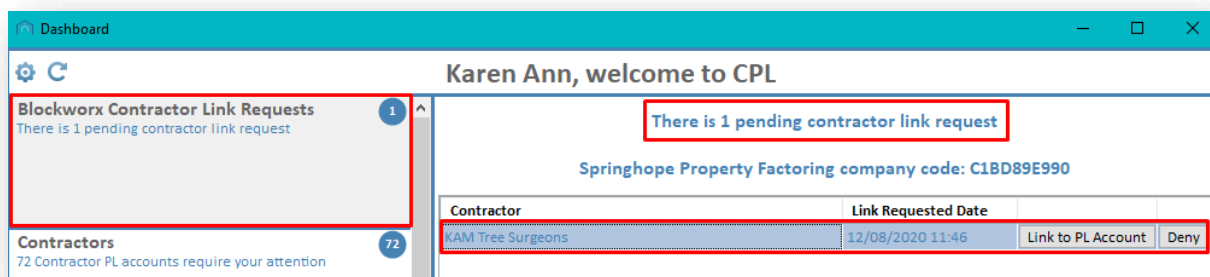
* = Required ☐ Disable Toaster Popups ☐ Disable Welcome Dashboard

Make sure there is not a tick in the **Disable Toaster Popups** box if you wish this user to be able to receive notifications.

When a contractor has requested to link with your company using Blockworx then notifications will be able to be viewed on the right of your CPL screen.



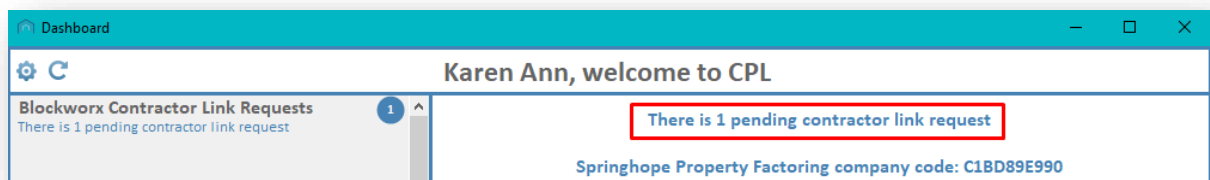
Clicking on the individual notification will open the Dashboard with the **Blockworx Contractor Link Requests** card selected.



LINKING THE CONTRACTOR TO A PL ACCOUNT

Your contractors will use a specific code which has been issued to them in order to request to link to your company. The next step is for you to connect this contractor to a Purchase Ledger Account you have set up for them in CPL.

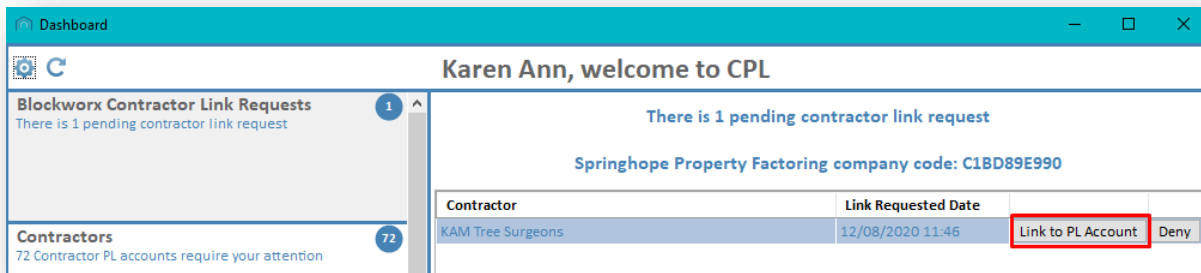
In order to view any link requests you have received, head to the **Blockworx Contractor Link Requests** card on your Dashboard.



You will see a message informing you of any pending link requests awaiting your attention.

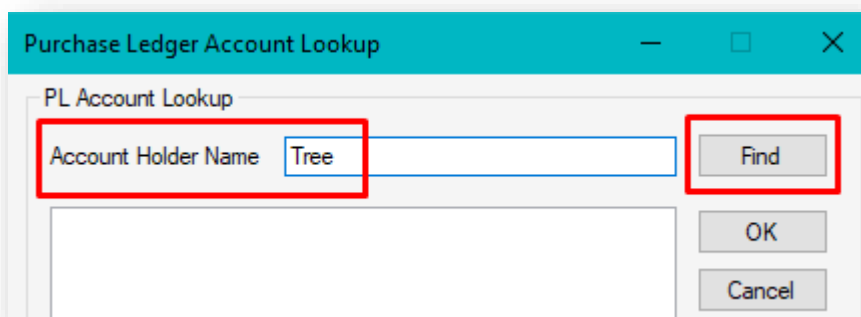
The link requests will be listed on the Dashboard card and you can link or deny them straight from here.

To link the contractor, click on the **Link to PL Account** button on the Dashboard card.

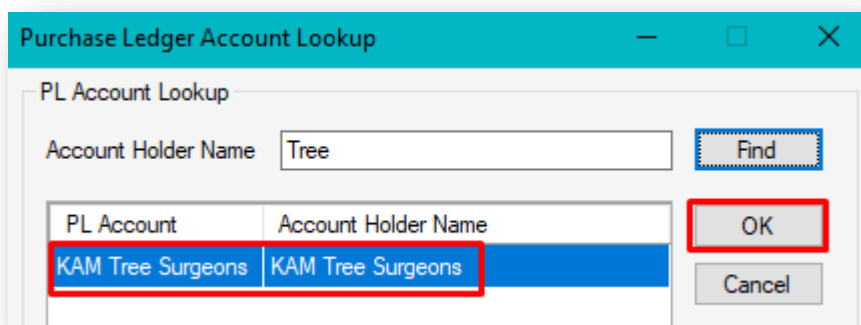


This will open a **Purchase Ledger Account Lookup** window which will enable you to search for the appropriate account.

Add the contractor name or code into the **Account Holder Name** field and click on the **Find** button.



Once you have located the correct account, click to highlight it in the list of results and click on the **OK** button.

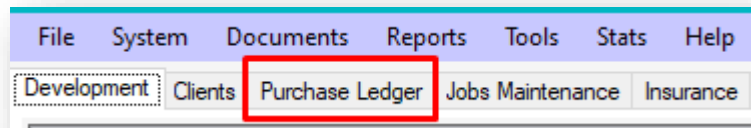


The contractor has been linked and will now be able to receive and respond to estimates and jobs and submit invoices to you in CPL via their Blockworx account.

REMOVING A LINK WITH A CONTRACTOR

If for any reason you wish to remove a link with a contractor, head to the Purchase Ledger Account screen for the contractor in question.

Click on the **Purchase Ledger** tab on the main CPL screen.



Search for their account by using the filters at the bottom of the screen and double-click to open the **Amend Purchase Ledger Account** window for this contractor.

Amend Purchase Ledger Account: Plumbing Company 108 Account Name: Plumbing Company 108

Save Close

PL Account Number	Contact Name	Status	Balance
Plumbing Company 108	Bob 108	Normal	11000.75

Account Holder Name	Telephone	Job Type
Plumbing Company 108		

Purchase Account Information Transaction Activity Memos Letter Documents Development Analysis Accreditations

Purchase Ledger Account Information

PL Account Code Plumbing Company 108 Account Status Normal Contractor ☐

Account Holder Name KAM Plumbing Job Type

Colloquial Name KAM Plumbing Email Address Send Email

Contact Name Karen-Ann McSwiggan

Address 7 Woodside Crescent Glasgow

Postcode G3 0BQ Payment Type Manual Account Type --SELECT--

☒ Payment Address Same as Address Grace Days 0 Show Web Invoices ☒

Payment Address 7 Woodside Crescent Glasgow VAT Registration VAT 20.00 Subcontracts ☐

Payment Postcode G3 0BQ Office

Telephone Number N/A H & S Expiry 12 August 2020 Use E Insurance ☐

E Insurance Expiry 12 August 2020 Use PL Insurance ☐

PL Insurance Expiry 12 August 2020 Asbestos Awareness Training ☐

T&C Docs Sent 12 August 2020 Bank Info Requested 12 August 2020

T&C Docs Received 12 August 2020 Bank Info Received 12 August 2020

Unlink Blockworx Contractor

Clicking the **Unlink Blockworx Contractor** button will mean that the contractor can no longer send comments and files to you on Jobs and Estimates using Blockworx. They will still exist as a PL Account in CPL, as before.

COMMUNICATING WITH A CONTRACTOR

When your contractor is using Blockworx there is much more opportunity for them to communicate with you as their comments, quotes and invoices will come directly into the appropriate modules within CPL.

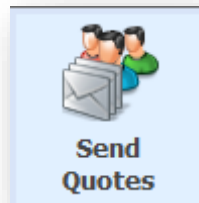
In the following sections you will find explanation for where you will see these comments, quotes and invoices and how this can help you achieve better communication with your contractor for a more efficient and smoother process for repairs and maintenance.

ESTIMATES

Create an estimate in CPL as you normally would, adding the contractors you would like to receive quotes from.

Estimate Request Wizard						
Contractors	View	Description	Amount	Duration	State	Updated
		0 - KAM Tree Surgeons : KAM Tree Surgeons		00:00:00	Population	
		0 - Gardening Company 14 : Gardening Company 14		00:00:00	Population	
		0 - Gardening Company 68 : Gardening Company 68		00:00:00	Population	

Once you have completed the estimate details, click on the **Send Quotes** icon as usual.



The contractor highlighted above has a Blockworx account and you have linked them through to their PL Account in CPL.

As well as receiving the estimate quote request by the normal method from CPL, your contractor will also receive information about this in their Blockworx website and app.

Estimate Requests						
10 records						
Company Name	Reference	ER Type	Quote Status	Created Date	Expiry Date	
Job Type	Estimate Name			Request Details		
Springhope Property Factoring	30204	Job	Requested	12/08/2020 02:00:14		
	UrgentTree Surgeon Work Required for Hopetoun Grange Development Please quote for pruning of 5 trees on the edge of the Hopetoun Grange Development which are overhanging the boundary pavement and road.					

They receive the information above and can also download the estimate details straight from Blockworx.

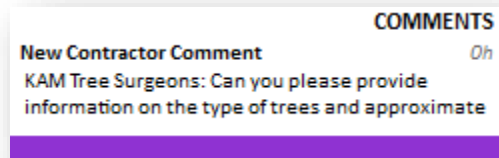
[Download Estimate Instructions](#)

When your contractor is ready to send their quote to you, they can do this through Blockworx.

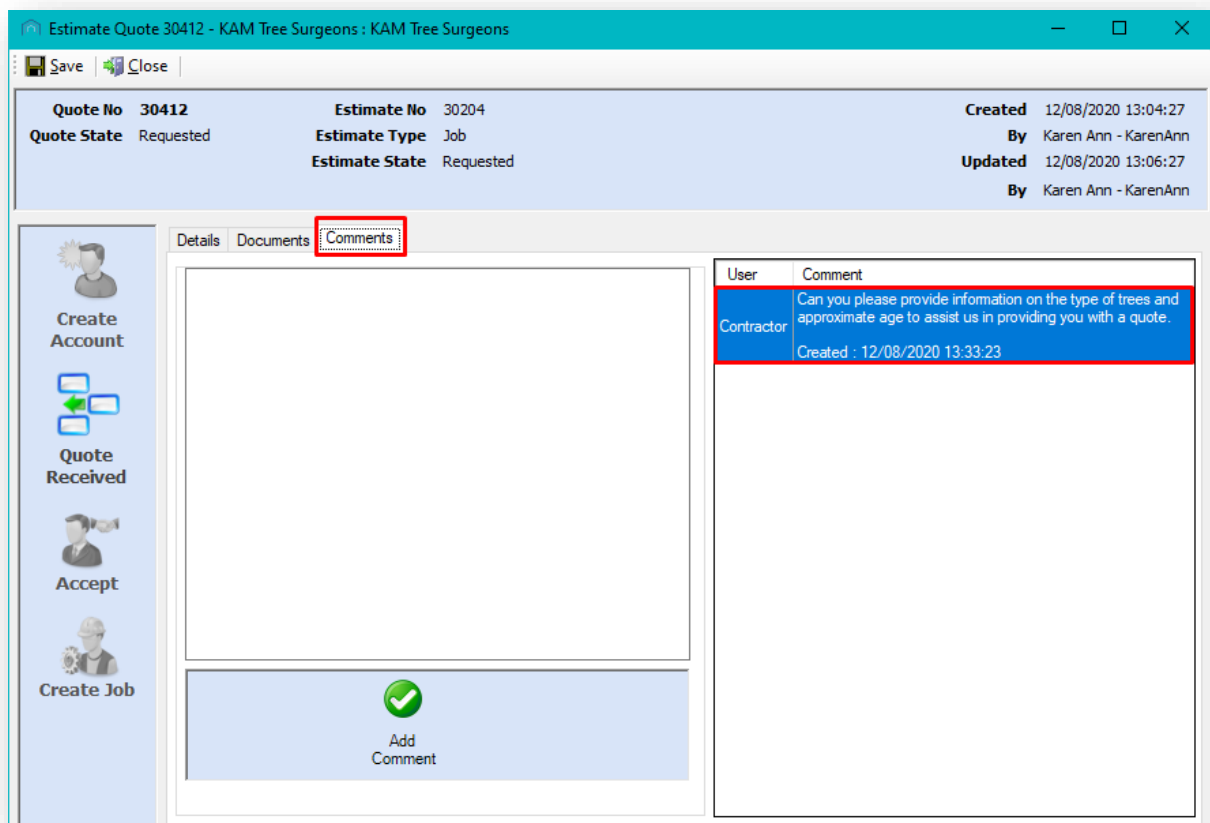
The contractor can also send you comments ahead of them submitting their quote. They may for example want additional information from you to enable them to provide a quote.

Any comments they submit regarding your estimate request will be available on the **Estimate Quote** window for that particular contractor.

If you raised this estimate (and you have not chosen to disable toaster popups) then you will receive a **New Contractor Comment** notification when the contractor sends a comment.



Clicking on this notification will open the **Comments** tab on the **Estimates Quote** window for this contractor and you will be able to review any comment they have sent by looking at the comments field on the right of the page.



You can type a return comment by entering this into the **Comment** field on the left of the screen.

Estimate Quote 30412 - KAM Tree Surgeons : KAM Tree Surgeons

Save

Close

Quote No

30412

Quote State

Requested

Estimate No

30204

Estimate Type

Job

Estimate State

Requested

Create Account

Quote Received

Accept

Create Job

Details

Documents

Comments

The trees are all Beech trees and they are over 100 years old.

You are amending a comment.

Click here

to enter a new comment.

Add Comment

Once you have typed the comment you wish to send, click on the **Add Comment** button to send this.

Your comment will then be added to the record in the field on the right of the screen and the contractor will receive an alert in Blockworx and be able to see your comment.

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User	Comment
Contractor	Can you please provide information on the type of trees and approximate age to assist us in providing you with a quote. Created : 12/08/2020 13:33:23
Karen Ann	The trees are all Beech trees and they are over 100 years old. Created : 12/08/2020 13:52:04 Updated : 12/08/2020 15:55:30

If you are not clicking on the notification to locate any comments from a contractor then you can navigate your own way to the comments tab by opening your estimate request and clicking on the **Quotes** tab.

Estimate Request No 30204

Save

Close

Estimate No30204

Estimate TypeJob

Estimate StateComplete

Estimate Progress

Created12/08/2020 13:00:14

ByKaren Ann - KarenAnn

Updated12/08/2020 18:03:47

ByKaren Ann - KarenAnn

Resend Quotes

Details

Quotes

Documents

Memos

View	Description	Amount	Duration	State	Updated	Remove
	30412 - KAM Tree Surgeons : KAM Tree Surgeons	1000.00	04:00:00	Task Created	12/08/2020 16:06	
	30413 - Gardening Company 14 : Gardening Company 14	1200.00	00:05:00	Rejected		
	30414 - Gardening Company 68 : Gardening Company 68	1300.00	00:06:00	Rejected		

Double-click on the contractor to open the **Estimate Quote** window and you can select the **Comments** tab.

Estimate Quote 30412 - KAM Tree Surgeons : KAM Tree Surgeons

Save

Close

Quote No

30412

Estimate No

30204

Created

12/08/2020 13:04:27

Quote State

Requested

Estimate Type

Job

By

Karen Ann - KarenAnn

Estimate State

Requested

Updated

12/08/2020 13:06:27

By

Karen Ann - KarenAnn

Create Account

Quote Received

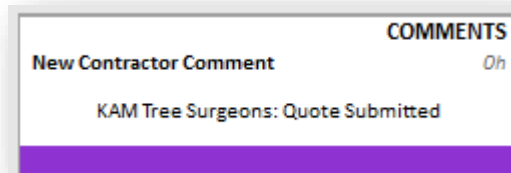
Details

Documents

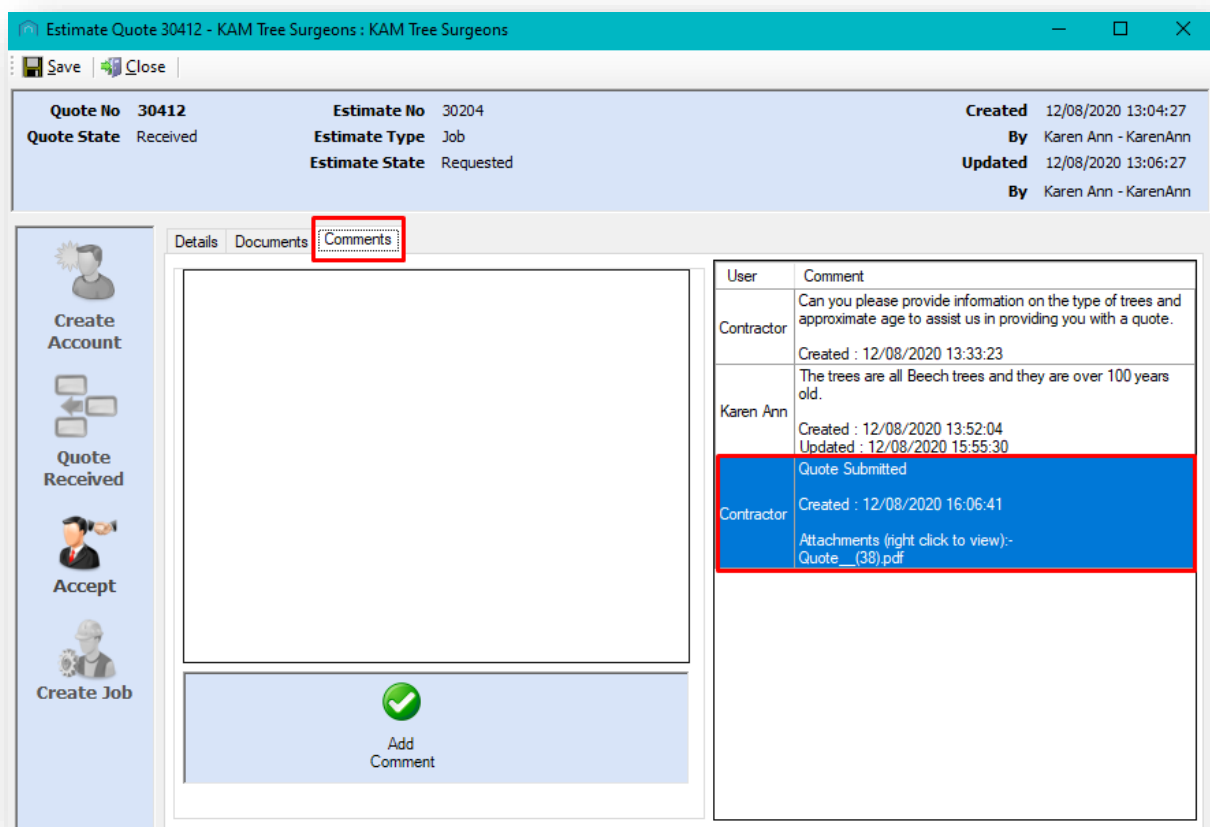
Comments

User	Comment
Contractor	Can you please provide information on the type of trees and approximate age to assist us in providing you with a quote.
	Created : 12/08/2020 13:33:23

Your contractor will be able to use Blockworx to submit an estimate quote to you and you will receive another notification to alert you to this.



Clicking on the notification will again take you to the **Comments** tab of the **Estimate Quote** window, where you will find an update to confirm that a quote has been submitted by the contractor.



If you click on the **Details** tab you will see that the fields have been automatically populated with the information from the contractor's quote and marked as a **Quote Received**.

Estimate Quote 30412 - KAM Tree Surgeons : KAM Tree Surgeons

Save Close

Quote No 30412	Estimate No 30204	Created 12/08/2020 13:04:27
Quote State Received	Estimate Type Job	By Karen Ann - KarenAnn
	Estimate State Requested	Updated 12/08/2020 13:06:27
		By Karen Ann - KarenAnn

Details Documents Comments

Amount 1000.00

Duration 04:00:00

Account [KAM Tree Surgeons : KAM Tree Surgeons](#)

Contact

Address

Postcode

Email

☐ Contact by Email

Create Account

Quote Received

Accept

Create Job

If you click on the **Documents** tab, you will find the quote has already been uploaded.

Estimate Quote 30412 - KAM Tree Surgeons : KAM Tree Surgeons

Save Close

Quote No 30412	Estimate No 30204	Created 12/08/2020 13:04:27
Quote State Received	Estimate Type Job	By Karen Ann - KarenAnn
	Estimate State Requested	Updated 12/08/2020 13:06:27
		By Karen Ann - KarenAnn

Details Documents Comments

Documents History

Send

Receive

Preview

Amend

Delete

Show Current Document Type --SELECT--

Transmit Types --SELECT-- Show Archived No

Search Refresh

Date Time	Document Type	Description
12/08/2020 16:06:44	Estimate Request Quote	Uploaded Document from Contractor P...

Source/Distribute Account
Estimate Request Quotes

Template

Document Type
Estimate Request Quote

Description
Uploaded Document from Contractor Portal

Batch No

Audience
Jobs

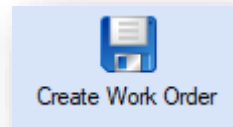
Document Also Sent To

You can now proceed, as you normally would, to accept the appropriate quote you would like to move ahead with and send emails.

JOBS

Once your estimate becomes a job, you would proceed as normal, through adding the additional information on Stage 1 of the Jobs Maintenance screen and click **Create New Job**.

On Stage 2 of the Jobs Maintenance screen your contractor will already be selected as usual. Once you have added the additional information to the other fields, click on the **Create Work Order** icon as you normally would.



As soon as you have clicked to create the work order for this job, your contractor will receive a notification in Blockworx with the full details.

Company Name	Created Date	Status	Completed
Job Type	Priority	Order	
Springhope Property Factoring	12/08/2020 06:29:25	Job In Progress	
Tree Surgeon	Urgent (1d)	5494801	✗

They also have the capacity to access the work order straight from their Blockworx app or website.


Download Work Order

This will all happen automatically for your contractors, before you have even chosen to email or print the work order.

Similar to your estimate, the **Comments** tab on your job will be able to be used for comments between yourself and the contractor. This works in exactly the same way as it did with comments on your estimate request.

Stage 1: Create Job Stage 2: Create Work Order Stage 3: Complete Work Order Job Memos Documents **Comments**

User	Comment
Karen Ann	Will you be out on-site at Hopetoun Grange today? Created : 12/08/2020 17:55:47
Contractor	Yes, we are planning to be there and have started work on the trees within the next hour. Do you want us to let you know when we arrive? Created : 12/08/2020 17:57:11
Karen Ann	Yes, if you could let me know, then that would be great. I would also like you to take a look at a tree on the west side of the property that might need attention. Created : 12/08/2020 17:58:02

 Add Comment

As before, the contractor will receive notifications when you make a comment about the job and you will receive a notification in CPL when the contractor has made a comment to you.

If, when you created the job, you allocated it to another CPL user, or allocated a follow-up user then the appropriate user would receive the notifications within CPL when a comment is received.

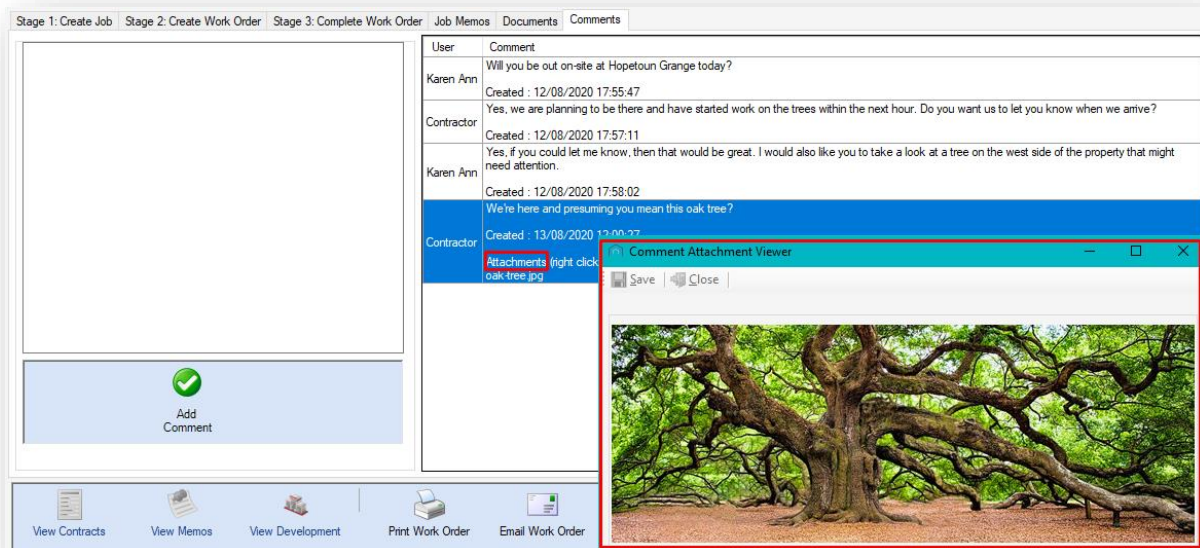
Allocated User Next User

COMMENTS

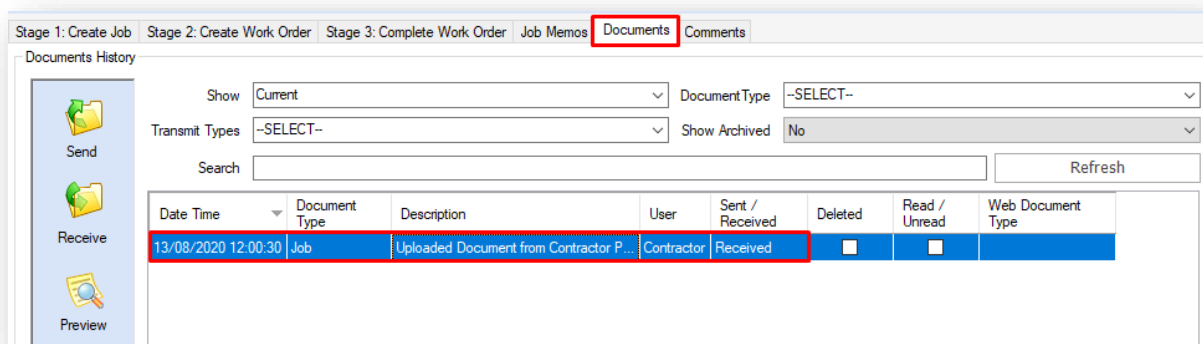
New Contractor Comment Oh

KAM Tree Surgeons: We're here and presuming you mean this oak tree?

Your contractors will also be able to attach files, including images to their comments which you will be able to view in the comments tab of the job.



Any attachments submitted with your contractor's comments will also be available on the **Documents** tab for the job.



Messages can be sent backwards and forwards between you and your contractor at any time using their Blockworx account and you can come to agreement there and then. For example, they could be using the Blockworx App when they are onsite and message you directly with an image concerning the job.

You will also have a full record of all comments made in one place for the job, rather than a series of emails and phonecalls.

Previously, you would have had to mark the job as completed on Stage 3 of the Jobs process. However, the job will now be marked as completed when the contractor uses Blockworx to note the date and time and submit their invoice to you.



User	Comment
Karen Ann	Thanks, that's the one - I will send a separate estimate request for pruning this tree back. I'd be grateful if you could let me know how you get on with the other trees. Many thanks. Created : 13/08/2020 12:13:23
Contractor	It looks as though the Beech trees may take longer to prune than we had previously thought and there is an issue with some disease on one of them which will have to be treated. Created : 13/08/2020 12:14:54
Karen Ann	Ok, understood. Can you let me know how much you think that will add to the total cost for the job please? Created : 13/08/2020 12:16:03
Contractor	Bob is looking at that just now and thinks it will add another hour onto the job. This will add another £200 onto the total cost. Would you like us to go ahead with the additional treatment for this tree? Created : 13/08/2020 12:17:48
Karen Ann	Yes, please go ahead with that additional work. Created : 13/08/2020 12:18:21

Contractor	Thanks - the job is now completed and we've cleared everything up and left the site. Created : 13/08/2020 12:27:32
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PROPOSED INVOICES

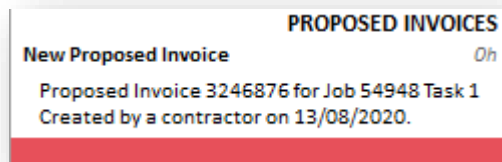
Your contractor can also use Blockworx to submit their invoice to you.

COMMENTS	
New Contractor Comment	<i>Oh</i>
KAM Tree Surgeons: Proposed Invoice (3246876) Submitted at 13/08/2020 12:52:03	

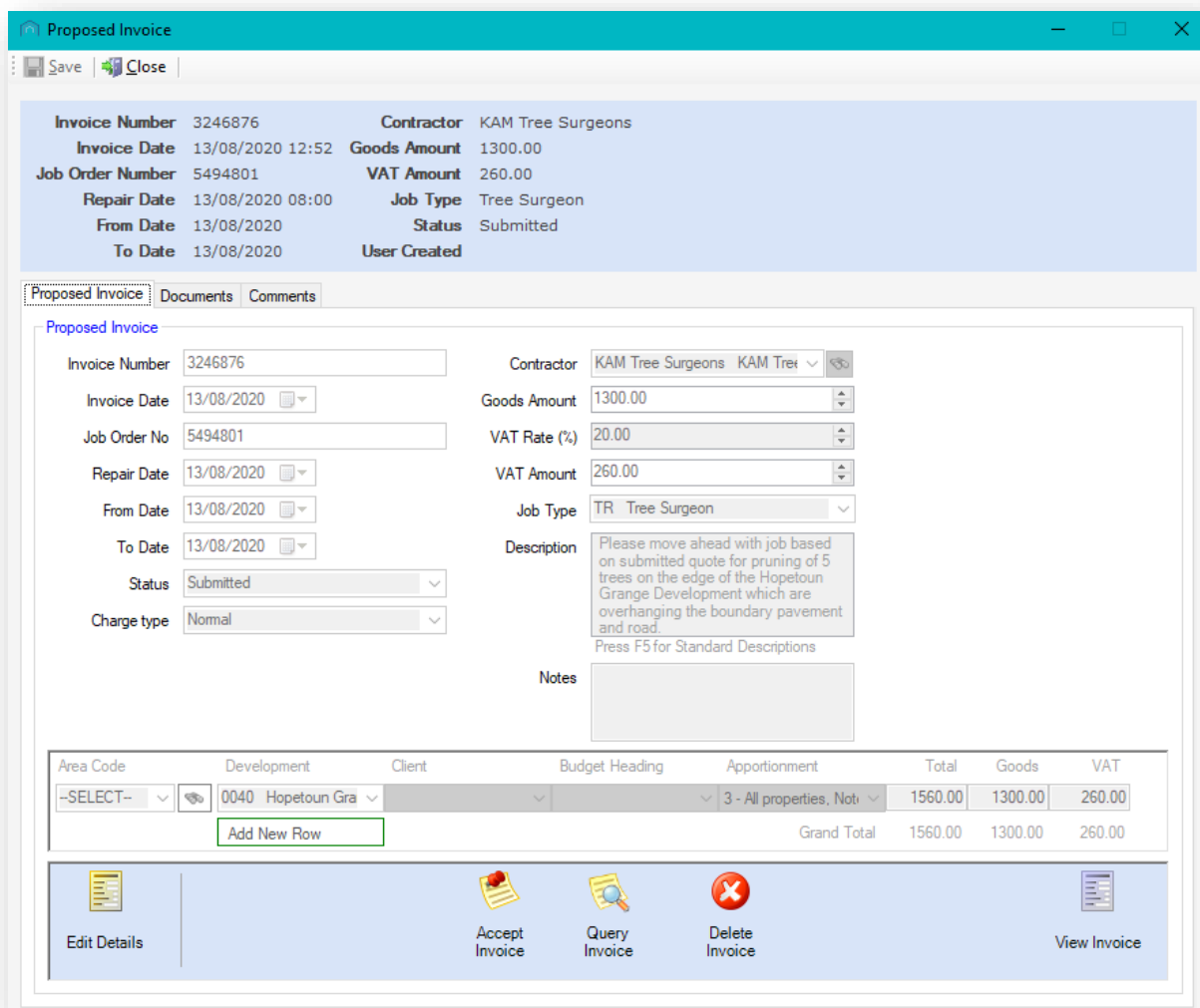
When they have done this, you will receive a notification telling you that the comment on the job has been updated. Clicking on this notification will open the job and take you to the comments tab where the new comment will be listed.

Contractor	Proposed Invoice (3246876) Submitted at 13/08/2020 12:52:03 Created : 13/08/2020 12:52:03
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You will also receive a separate notification informing you that there is a new proposed invoice awaiting your attention.



Clicking on this notification will open the individual **Proposed Invoice** screen which will contain all details of the contractor invoice for the work carried out.



Proposed Invoice [Save] [Close]

Invoice Number	3246876	Contractor	KAM Tree Surgeons
Invoice Date	13/08/2020 12:52	Goods Amount	1300.00
Job Order Number	5494801	VAT Amount	260.00
Repair Date	13/08/2020 08:00	Job Type	Tree Surgeon
From Date	13/08/2020	Status	Submitted
To Date	13/08/2020	User Created	

Proposed Invoice | Documents | Comments

Proposed Invoice

Invoice Number: 3246876 Contractor: KAM Tree Surgeons KAM Trei

Invoice Date: 13/08/2020 Goods Amount: 1300.00

Job Order No: 5494801 VAT Rate (%): 20.00

Repair Date: 13/08/2020 VAT Amount: 260.00

From Date: 13/08/2020 Job Type: TR Tree Surgeon

To Date: 13/08/2020 Description: Please move ahead with job based on submitted quote for pruning of 5 trees on the edge of the Hopetoun Grange Development which are overhanging the boundary pavement and road. Press F5 for Standard Descriptions

Status: Submitted

Charge type: Normal

Notes:

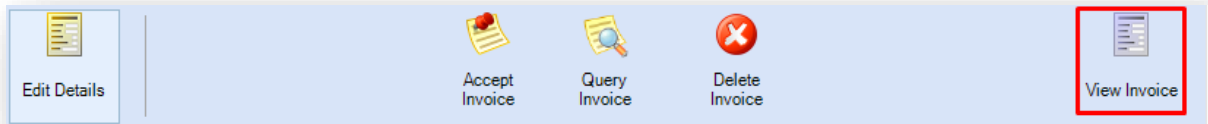
Area Code	Development	Client	Budget Heading	Apportionment	Total	Goods	VAT
-SELECT-	0040 Hopetoun Gra			3 - All properties, Not	1560.00	1300.00	260.00
Grand Total					1560.00	1300.00	260.00

Add New Row

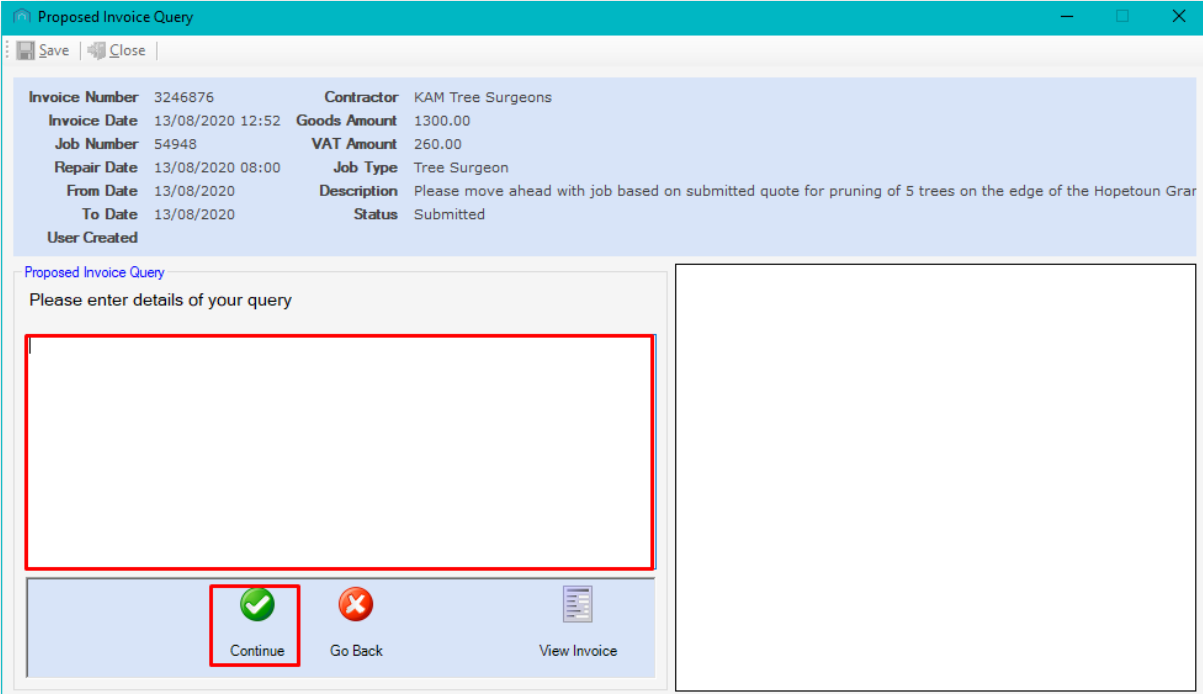
Edit Details Accept Invoice Query Invoice Delete Invoice View Invoice

If you use the In-Tray in CPL then you will already be familiar with linking invoices through to the Proposed Invoices module. This allows you to view the invoice, query or delete and once you are happy with all details, accept it.

To view the invoice, click on the **View Invoice** icon in the action bar at the foot of the screen and you will see the invoice submitted by the contractor.



If you wish to query any aspect of the invoice, you can click on the **Query Invoice** icon and the **Proposed Invoice Query** window will launch. This works in the same way as the comments tabs for both your estimate and your job, except in this instance the comments will be held on the proposed invoice screen.






Proposed Invoice Query

Save Close

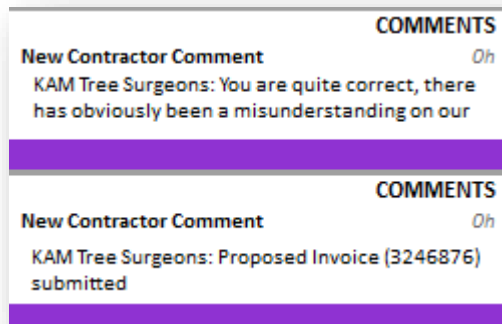
Invoice Number	3246876	Contractor	KAM Tree Surgeons
Invoice Date	13/08/2020 12:52	Goods Amount	1300.00
Job Number	54948	VAT Amount	260.00
Repair Date	13/08/2020 08:00	Job Type	Tree Surgeon
From Date	13/08/2020	Description	Please move ahead with job based on submitted quote for pruning of 5 trees on the edge of the Hopetoun Grar
To Date	13/08/2020	Status	Submitted
User Created			

Proposed Invoice Query
Please enter details of your query

 Continue  Go Back  View Invoice

Enter the query message you wish to send to the contractor in the field on the left of the screen and click on the **Continue** icon to send this. This will send your message to the contractor and close the additional **Proposed Invoice Query** window.

When the contractor responds with a comment and/or an updated invoice a notification will be received by the Property Manager and the Credit Control Manager listed for the individual Development in CPL.









Clicking on either of these notifications will link you back through to the appropriate **Proposed Invoice** screen. Your updated invoice will now be available from there and the pin panel at the top of the screen will show the updated invoice amounts in red to alert you to the fact that these have changed.

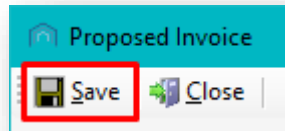
Invoice Number	3246876	Contractor	KAM Tree Surgeons
Invoice Date	13/08/2020 13:51	Goods Amount	1200.00
Job Order Number	5494801	VAT Amount	240.00
Repair Date	13/08/2020 08:00	Job Type	Tree Surgeon
From Date	13/08/2020	Status	Submitted
To Date	13/08/2020	User Created	

Click on the **Edit Details** icon, if you wish to amend details such as the apportionment, or the budget heading or to update the totals now that the contractor has updated the invoice.

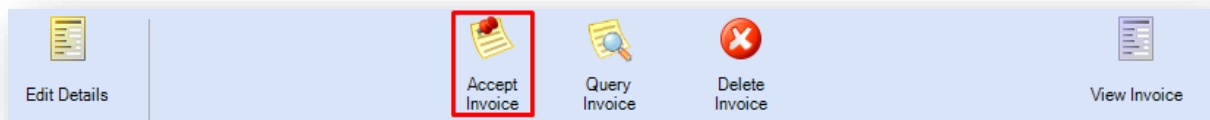
Area Code	Development	Client	Budget Heading	Apportionment	Total	Goods	VAT
-SELECT-	0040 Hopetoun Gra			3 - All properties, Not	1560.00	1300.00	260.00
Add New Row					Grand Total	1560.00	1300.00

 Edit Details
  Discard Changes
  Accept Invoice
  Query Invoice
  Delete Invoice
  View Invoice

Once you have edited any of the posting details, head to the top of the screen and click on the **Save** option to ensure any changes are saved.



When you are happy with the invoice you can click on the **Accept Invoice** option in the action bar at the foot of the screen.



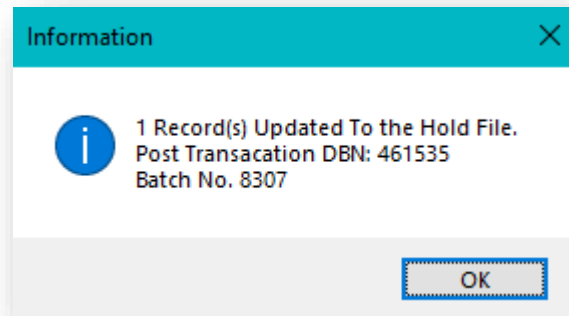
This will open the **Accept Proposed Invoices** screen where you can make any further changes required.

 A screenshot of the 'Accept Proposed Invoice' screen. The window has a title bar with a house icon and the text 'Accept Proposed Invoice'. Below the title bar is a toolbar with 'Save' and 'Close' buttons. The main area is divided into several sections:

- Invoice Details:** A light blue section containing fields for Invoice Number (3246876), Invoice Date (13/08/2020 13:51), Job Order Number (5494801), Repair Date (13/08/2020 08:00), From Date (13/08/2020), To Date (13/08/2020), Contractor (KAM Tree Surgeons), Goods Amount (1200.00), VAT Amount (240.00), Job Type (Tree Surgeon), Status (Submitted), and User Created.
- Accept Proposed Invoice:** A section with form fields for Post Type (Next Invoice Run), VAT Rate (20.00), Cash Book Reference, Invoice Due (13/08/2020), Auto Release (checkbox), Transaction Date (13/08/2020), and Internal Notes (Invoice re-submitted by contractor after incorrect agreed amount on 1st invoice).
- Description:** A text area containing the description: 'Please move ahead with job based on submitted quote for pruning of 5 trees on the edge of the Hopetoun Grange Development which are overhanging the boundary pavement and road.'
- Charge Type:** A dropdown menu set to 'Normal'.
- Table:** A table with columns: Area Code, Development, Client, Budget Heading, Apportionment, Total, Goods, and VAT. It shows a single row for '0040 Hopetoun Grang' with a total of 1440.00, goods of 1200.00, and VAT of 240.00. A 'Grand Total' row is also present.
- Action Bar:** At the bottom, it contains 'Post Invoice' (with a green plus icon), 'Go Back' (with a red X icon), and 'View Invoice' (with a document icon). The 'Post Invoice' button is highlighted with a red rectangular box.

When you are satisfied with everything, you can click on **Post Invoice** to post the invoice through to the Hold File as normal.

Your invoice will be posted and you will receive a confirmation pop-up message.



DIARISED CHARGES

Working with diarised charges for your developments with a contractor who is using Blockworx will now also be slightly different. The invoices will come in through Blockworx from your contractor when they are prompted by you running the diarised charge. The diarised charge will be suspended until the corresponding invoice comes in from your contractor and is approved by you.

When you have created a diarised charge, you will still run this in the **Diarised Charges** tab in PL Global for a period as normal. However, your contractor will now be able to get a notification in their **Outstanding Charges** area within Blockworx each time you do this.

Outstanding Invoices					
PM Company	Name	Description	Invoice Date	Amount	Status
Springhope Property Factoring	Drains and Gutter Check	Drains and Gutter Check for Hopetoun Grange	01/08/2020	£50.00	Invoice Required

This acts as a prompt for your contractor who can then use Blockworx to generate and submit an invoice to you for this charge.

This invoice will be transmitted directly to CPL where you can view, approve or reject it.

Prior to being approved, the invoice will automatically be placed on **Suspend** in the Purchase Ledger as can be seen in the PL Account on the **Transaction Activity** tab for this contractor below.

Amend Purchase Ledger Account: KAM Plumbing Account Name: KAM Plumbing

Save Close

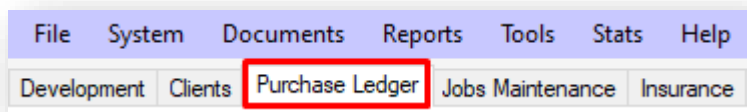
PL Account Number	KAM Plumbing	Contact Name	Karen-Ann McSwiggan	Status	Normal	Balance	11060.75
Account Holder Name	KAM Plumbing	Telephone		Job Type			

Purchase Account Information Transaction Activity Memos Letter Documents Development Analysis Accreditations

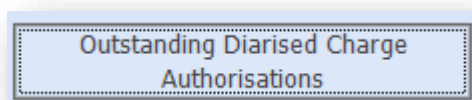
Posted Invoices Information

Transaction Description	Insurance Policy No.	Invoice	Total	Goods	VAT	O/S	Running Balance	Notes	S
Drains and Gutter Check for...		Drains and Gutter Check 13082020	£60.00	£50.00	£10.00	£60.00	£11,060.75		<input checked="" type="checkbox"/>
Pumping Station Costs 01.0...		42933	£106.99	£106.99	£0.00	£106.99	£11,000.75	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Septic tank charges		SBC0179696	£356.00	£356.00	£0.00	£356.00	£10,893.76	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Septic Tank Charges		SBC0178794	£356.00	£356.00	£0.00	£356.00	£10,537.76	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Septic tank empty		2429585	£356.00	£356.00	£0.00	£356.00	£10,253.76	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Septic Tank Charges		2429585	£356.00	£356.00	£0.00	£356.00	£9,897.76	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Septic tank emptying		SBC0175787	£356.00	£356.00	£0.00	£356.00	£9,541.76	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Emptying septic tank		SBC0175113	£356.00	£356.00	£0.00	£356.00	£9,185.76	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To approve or reject the invoice, click on the **Purchase Ledger** tab on the main CPL screen.



This will open the Purchase Ledger screen. Click on the **Outstanding Diarised Charge Authorisations** button on the pin panel on the right of the screen.



This will open the **Outstanding Diarised Charge Authorisation** screen, where you will find the diarised charge invoice listed with a corresponding preview.

PL Account No

KAM Plumbing

Invoice Date

01/08/2020

Invoice Goods Amount

£50.00

PL Acc Name

KAM Plumbing

Client

--None--

Invoice VAT Amount

£10.00

Invoice No

Drains and Gutter

Apportionment

All properties

Invoice Total Amount

£60.00

Authorised?

No

Authorise

Reject

Invoice No	Invoice Date	PL Account No	PL Acc Name
101: Garden/Gro...	01/11/2017	1004	HandyMan 101
101: Garden/Gro...	01/12/2017	1004	HandyMan 101
4933: abcbcab...	01/12/2017	1001	Insurance 1001
Drains and Gutter...	01/08/2020	KAM Plumbing	KAM Plumbing
Grounds Mainten...	01/06/2017	Gas Company 53	Gas Company 53
Grounds Mainten...	01/07/2017	Gas Company 53	Gas Company 53
Grounds Mainten...	01/08/2017	Gas Company 53	Gas Company 53
Grounds Mainten...	01/09/2017	Gas Company 53	Gas Company 53
Grounds Mainten...	01/10/2017	Gas Company 53	Gas Company 53
Grounds Mainten...	01/11/2017	Gas Company 53	Gas Company 53
Grounds Mainten...	01/12/2017	Gas Company 53	Gas Company 53

Attachment Viewer

TAX INVOICE

Invoice Date

13 Aug 2020

Invoice Number

Drains and Gutter Check13082020

Reference

Drains and Gutter Check13082020

VAT Number

Description

Drains and Gutter Check

Goods

50.00

VAT

10.00

Total

60.00

If you are not happy with this invoice then you can choose to **Reject** it by clicking on the red button at the top of the screen. This will remove this invoice from the screen and the contractor would then be alerted to submit another invoice. You could then repeat this process for navigating to the **Outstanding Diarised Charge Authorisation** screen to locate the new invoice.

When you are happy to **Authorise** the invoice, click on the green button at the top of the screen. Once authorised, if you click on anything else in the list you will notice that your diarised charge has turned green.

PL Account No

Gas Company 53

Invoice Date

01/06/2017

Invoice Goods Amount

£120.00

PL Acc Name

Gas Company 53

Client

--None--

Invoice VAT Amount

£0.00

Invoice No

Grounds Maintenance

Apportionment

All residents

Invoice Total Amount

£120.00

Authorised?

No

Authorise

Reject

Invoice No	Invoice Date	PL Account No	PL Acc Name
101: Garden/Gro...	01/11/2017	1004	HandyMan 101
101: Garden/Gro...	01/12/2017	1004	HandyMan 101
4933: abcbcab...	01/12/2017	1001	Insurance 1001
Drains and Gutter...	01/08/2020	KAM Plumbing	KAM Plumbing

Attachment Viewer

Sindy Word Document

Dear <ClientName>

Test letter merge<ClientNo> <ClientDescription>

<ClientEmail>



If you head back to the PL Account for this contractor and back to the **Transaction Activity** tab you will see that, since it has been approved, the diarised charge is no longer on suspend.

Purchase Account Information

Transaction Activity

Memos

Letter Documents

Development Analysis

Accreditations

Posted Invoices Information

View

Transaction Description	Insurance Policy No.	Invoice	Total	Goods	VAT	O/S	Running Balance	Notes	S	C
Drains and Gutter Check for...		Drains and Gutter Check13082020	£60.00	£50.00	£10.00	£60.00	£11,060.75	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pumping Station Costs 01.0...		42933	£106.99	£106.99	£0.00	£106.99	£11,000.75	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

This diarised charge will now come through for your normal payment runs since it is no longer suspended.



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