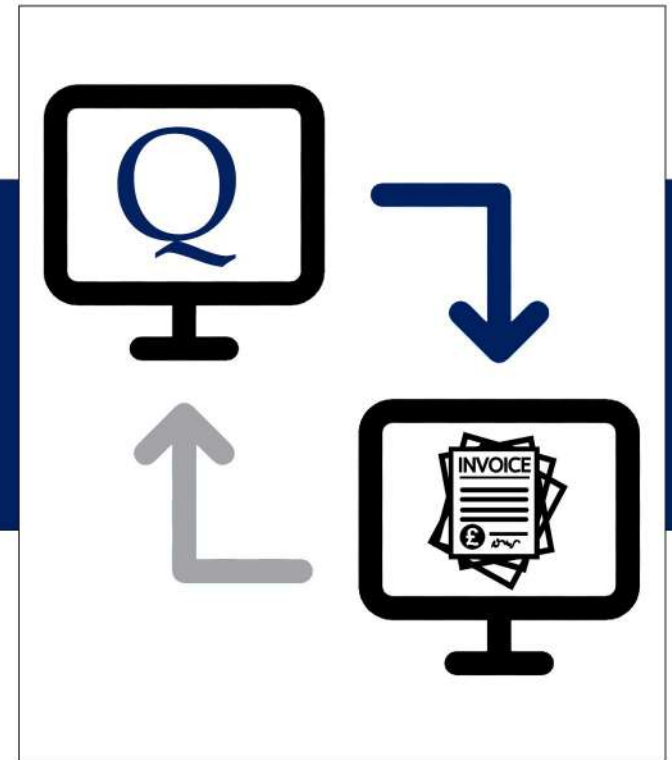# Quadpro

Invoice Integration Module

What is the Invoice Integration Module?

We have created a comprehensive way to manage your invoice payments and approvals via the Quadpro Web Portal.

The Invoice Integration Module (IIM) is compatible with SAGE, PASS and iFinance accounting packages and provides you with the ability to input and approve invoices directly using the Quadpro Web Portal module.

The *IIM* makes the process of inputting, approving and submitting invoices much quicker, easier and more auditable.

As shown in the example, for each invoice you will only need to enter information once. After approval in the *IIM*, the invoices are exported ready for import in the account package.

Two Step Approval Process

We have integrated a two-step approval process in the *IIM* to ensure that you can check each invoice properly.

Tracking Payments

The *IIM* links directly in to your Works Order module so you can keep track of all invoices paid into the Quadpro system.

Invoice

Document:	View invoice
Supplier name:	1st-Surface Ltd
Works order:	4749
Invoice number:	456
Invoice date:	08/04/2022
Description:	Second Payment for Contract Work
Amount:	166.67
VAT rate:	Standard rate 20%
VAT:	33.33
Total:	200.00
Hold payment:	
Notes:	

Back

Submission

Submitted by:	Quadpro Admin
Submission date:	08/04/2022
Submission time:	09:53:53

Delivery Note

Document:	No file uploaded.

Approval

Approval status:	Approved
Assigned to:	Quadpro Admin
Operative approved:	
Operative name:	Quadpro Admin
Approval date:	08/04/2022
Approval time:	09:53:53
Manager approved:	
Invoice type:	Interim
Manager name:	Quadpro Admin
Approval date:	08/04/2022
Approval time:	09:53:53

Export

Export status:	Not exported
Export date:	

WORKS ORDER	SITE	BUILDING	SPACE	COMMENTS	TOTAL ESTIMATES	TOTAL COMMITTED	TOTAL ACTUAL
4749	Main Site	10 High Street			800.00	800.00	0.00

	WORKS ORDER	SUPPLIER	INVOICE TYPE	INVOICE NUMBER	DATE	TOTAL	APPROVER	STATUS
	4749	1st-Surface Ltd	First	123	08/04/2022	200.00	Quadpro Admin	✓ Approved
	4749	1st-Surface Ltd	Interim	456	08/04/2022	200.00	Quadpro Admin	✓ Approved
Total						400.00		

Payments / Invoices

Type	Inv No	Date Approved	Actual Cost	WO No	Export Date
First	001	09/03/2022	600.00	2618	

File Storage

A PDF copy of the invoice and any documents - such as delivery notes are automatically stored in your system alongside the invoice record.

Paper Trail

To assist when approving invoices, each invoice record also displays an audit trail of all related payments for the Works Order you are currently viewing.

What are the advantages of the Invoice Integration Module?

Our Invoice Integration Module provides estates managers with the ability to input and track invoices in the Quadpro system. We know that approving invoices can take longer than expected due to waiting for colleagues to respond to your email or directly contact you to finalise their approvals.

We sought to reduce the time it takes for creating, approving and managing invoices by building a link between your finance package and Quadpro.

Improves Productivity

Avoid the need to enter invoices twice as the information is shared between Quadpro and your finance system upon export.

Once a manager has approved the invoice, it will update in the system automatically and reflect budget changes. You can access the invoice module on tablet or desktop devices.

Viewing and Managing Invoices:

This module provides the flexibility for multiple authorised users to view, manage and approve created invoices.

Email Notification for Approvals

When an invoice is created, an email is sent out to the relevant user advising them of the invoice and that is it ready to be reviewed and signed off.
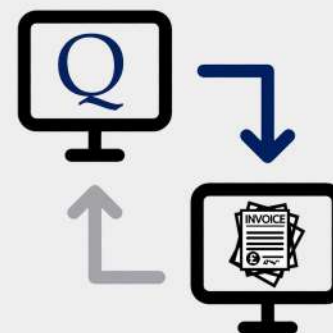
Saves Time and Assists with Productivity

The Invoice Integration Module has everything needed for the input, approval and export of invoices all in one easy to use web interface.

Operatives and Managers are notified of invoices they need to review and aprove.

The direct export of accounts package ready approved invoice records saves entering records twice in accounts and Quadpro, saving you enormous amounts of time and resources.

The full audit trail including documents makes for a secure process.

Hi Steve Manager,

You have a new invoice waiting to be approved:

Works order: 2596
Supplier name: ABC Carpentry
Invoice number: 2

Quadpro

The invoice module is simple to use and can be accessed by any approved user in your system. In seven steps you can easily add invoices to your Quadpro Works Orders and they are then integrated with your finance packages ready for payment.

Step 1:

The invoice is recieved electronically or in paper format by finance/estates department.

Step 2:

Invoice is entered into the Quadpro Web Portal and linked with the Works Order.

Step 3:

User who created Works Order receives an email notifying them of an Invoice that needs approval.

Step 4:

User then approves the invoice.

Step 5:

Invoice is then fully approved by the estates manager.

Step 6:

Invoice is stored in the system and payment is reflected against the Works Order in the desktop system.

Step 7:

Export invoices to your finance department. All relevant PDF attachments such as delivery note and invoice documents will be stored with the invoice record.