



Incoming and outgoing emails

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INTRODUCTION TO EMAILING

PropertyIQ automatically records and stores any emails that you generate from within PropertyIQ – called Outgoing emails. PropertyIQ also allows you to save records of the emails you receive outside PropertyIQ – called Incoming emails.

Incoming and outgoing emails can be attached to the records of the lot owner, building or supplier that they relate to.

CONFIGURING OUTGOING EMAILS

You can usually find your mail server settings from the settings area of your email account.

1. The default view is global settings. If you use folios, you can select a folio from the list to set up different mail server settings if the folio uses another mail server
2. Your outgoing mail server URL shows here
3. The port number shows here
4. Your authentication method is selected from the dropdown list here
5. Your authentication protocol is selected from the dropdown list here
6. Your email account username shows here
7. Your email account password is entered here
8. Realm is only needed if you use the authentication method NTLM. Your implementation manager will advise if this is needed
9. Workstation is only needed if you use the authentication method NTLM. Your implementation manager will advise if this is needed
10. Your sender details are entered here
11. This is the email address emails are sent from and will show in the “from” field of the email
12. This is the email address you want replies to go to. If a recipient replies to an email you have sent it will be sent to this address. There are alternative “reply to” options for some email types. These can be set from the Templates menu>Standard Email Templates
13. Select this option to mark your emails as bulk notifications to reduce the possibility of them being categorised as spam by the recipient’s email server. Click on *What Does this Mean* to see this explanation:
14. Enter the maximum number of recipients per email. This is often 500 for applications like outlook. If you’re sending an email to more than the specified number of recipients, PropertyIQ will automatically create multiple duplicate emails.
15. Hover your mouse over the question mark for an explanation
16. Enter an email address and then click *send test email* to trigger a test email

PropertyIQ Strata Currently Logged In as: ama
Role: Super Administrator
0.190.0 13/12/2019

Settings

Company Details | Application Settings | Meetings | Supplier Compliance | Mailing House | Portal Integration | Bank Settings | Reminders | File System Related | Cover Pages | **Mail Server Settings** | Licensing | Connections | SMS | Statistics | PIQ Support

Outgoing | **Incoming**

Follow: Global Settings

Mail Server Settings

Outgoing Mail Server

URL: 127.0.0.1

Port Number: 25

Authentication

Authentication Method: None

Authentication Protocol: None

Username: piqemailtest@gmail.com

Password:

Realm:

Workstation:

Sender details - these will appear on outgoing mail

From name: PropertyIQ

From email: propertyiq@macquarie.com (This setting will only have an effect if the Mail server allows it)

Reply to: propertyiq@macquarie.com

Send Email Options

Mark Emails as Bulk Notifications (Recommended) ☒ [? What does this mean?](#)

Max Local Email Recipients: 500

Test Mail Server Settings

Email Address:

Edit

CONFIGURING INCOMING EMAILS

GETTING STARTED

The first step is to ask your email server administrator to create a new imap (pop addresses are not compatible with this feature) email address on your email server that will not be used by staff members (PropertyIQ will clear the inbox each time it connects)

Once the address had been created you will need to know the following details to proceed with setting up incoming emails:

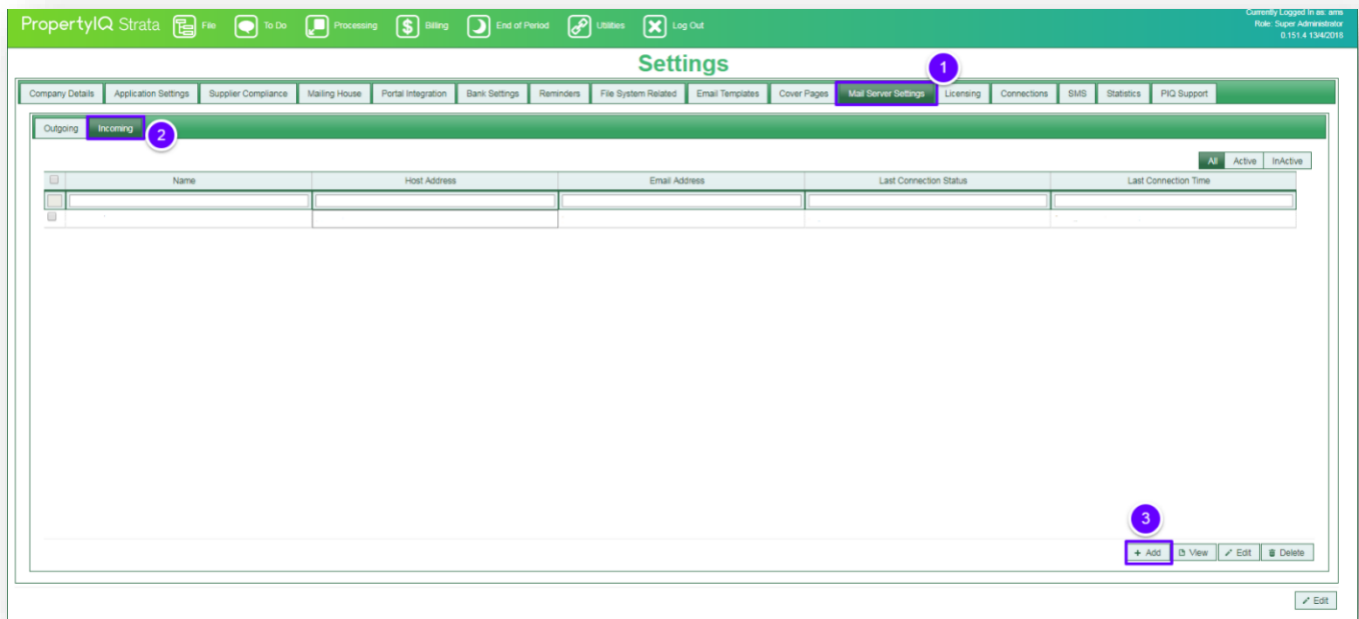
- Email address
- Email username
- Email password (note: an application password may be required to allow PropertyIQ to connect and make changes)
- imap url
- port

We suggest that you create an email address named something like strata-import@yourcompanyname.com.au



Now, go to and select Settings

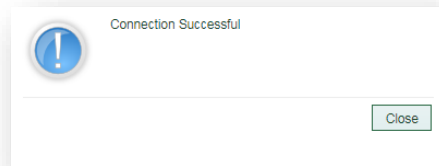
1. Select *Mail Server Settings*
2. Select *Incoming Email*
3. Select *Add*



1. Give the mail box a name you will remember
2. Enter the email address you created in step 1 above. We recommend that you tick the “Please verify settings with Test Connection” This allows you to test your settings before enabling them.
3. Type the details of your company’s incoming mail server. (Your own IT support can help you with this if you need it)
4. Enter the port number (Your own IT support can help you with this if you need it)
5. Select the server type from the dropdown list (Your own IT Support can help you with this if you need it)
6. Select the security type from the dropdown list (Your own IT Support can help you with this if you need it)
7. Type the username here (usually the same as the mail address)
8. Type the password for the email address here
9. From the dropdown list, choose what you want to happen to emails once they are downloaded to PropertyIQ. The choices are:
 - i. *Move to Folder* (recommended). When Property IQ has successfully downloaded the email, the email will be moved from the inbox (on your mail server) into the folder (on your mail server) specified below. This is so Property IQ knows that the email has been imported and won’t re-import the same email again. You can enter the folder name below, and if the folder you enter doesn’t exist on your mail server, PropertyIQ will try to automatically create the folder for you when you click ‘Test Connection’.
 - ii. *Delete from Server* – If this option is selected, after Property IQ has successfully downloaded the email, it will delete the email from your mail server. (This option is not recommended and we suggest only using this if you have very limited space on your mail server.)
A better approach if you have limited space on your mail server is to use the option *Move to Folder*, but every month rename the folder to something like “PIQ-Processed-Jan-2019”, and then “PIQ-Processed-Feb-2019”. And then you can delete/ archive older folders from your mail server when you run low on space.
10. If you selected *move to a folder*, you will need to provide the name of the folder (or use the default of PIQ-Processed) Any emails that have been imported by PropertyIQ will be moved to that folder.
11. Regardless of what option you select from the dropdown list, you will also need to provide a folder name (or use the default of PIQ-Failed) that will be used by Property IQ to move any emails that it cannot import into the application. For example, if an email has an attachment that is too large to be imported in to Property IQ, it will be moved into this folder.

12. *Test Connection* to test whether your details are valid, and also to create the folders (specified above) on your mail server.

If your credentials are valid you will see this message:



If your credentials are invalid the pop-up will show you what the problem is:



13. *Delete* to delete the connection
14. If your credentials are valid – select *Activate* to complete setting up the credentials
15. If you have made any changes you want to keep, *Save* before you exit
16. *Cancel* to cancel any changes you have made and exit the screen

Incoming Email Box

Mailbox Name*
Email imports

Active
☐ Please verify settings with 'Test connection' to unlock this

Mail Address*
strata-import@mystrataco.com.au

Incoming Mail Server

URL*
mail.mystrataco.com.au

Port*
993

Server Type
imap

Security Type
SSL/TLS

Username*
strata-imports@mystrataco.com.au

Password*

After Downloading Emails
Move to folder

Move Processed To Folder*
PIQ-Processed

Move Failed To Folder*
PIQ-Failed

Warning: Please do not use a personal address. It is recommended that you use a dedicated address (e.g. strata-import@company.com) as the emails will either be moved from the Inbox or deleted from the mail server (depending on your selected setting above).

Test Connection
Delete
Activate
Save
Cancel

VIEWING AND EDITING AN EXISTING INCOMING EMAIL BOX

1. Select the incoming email box you want to view or edit
2. *Edit*

The screenshot shows the PropertyIQ Strata Settings page. The top navigation bar includes links for File, To Do, Processing, Billing, End of Period, Utilities, and Log Out. The user is logged in as 'Super Administrator' on 15/01/2018. The 'Settings' section is active, with a sub-tab for 'Incoming' email boxes. A table lists the incoming email boxes with columns for Name, Host Address, Email Address, Last Connection Status, and Last Connection Time. The 'Email imports' row is selected, indicated by a purple circle with the number 1. At the bottom right of the table, there are buttons for '+ Add', 'View', 'Edit', and 'Delete', with the 'Edit' button highlighted by a purple circle with the number 2.

| Name | Host Address | Email Address | Last Connection Status | Last Connection Time |
|---------------|-----------------------|--------------------------------|------------------------|-----------------------|
| gmail test | imap.gmail.com | piqemailtest@gmail.com | Ok | 24/05/2018 - 11:33 am |
| Email imports | mail.mystatato.com.au | strata-import@mystatato.com.au | | |

1. Enter any changes you want to make

2. *Test connection* to test the new settings
3. *Save* when you are ready

The screenshot shows the 'Incoming Email Box' configuration window. It contains the following fields and options:

- Mailbox Name***: Email imports
- Active**: ☐ Please verify settings with 'Test connection' to unlock this
- Mail Address***: strata-import@mystrataco.com.au
- Incoming Mail Server**
 - URL***: mail.mystrataco.com.au
 - Port***: 993 (Callout 1 points to this field)
 - Server Type**: imap
 - Security Type**: SSL/TLS
 - Username***: strata-imports@mystrataco.com.au
 - Password***: [Redacted]
- After Downloading Emails**: Move to folder
- Move Processed To Folder***: PIQ-Processed
- Move Failed To Folder***: PIQ-Failed










Warning: Please do not use a personal address. It is recommended that you use a dedicated address (e.g. strata-import@company.com) as the emails will then be moved from the Inbox or Deleted Items folder to the specified folder from the mail server (depending on your settings above).

Callout 2 points to the warning text, and Callout 3 points to the 'Test Connection' button.

Buttons at the bottom: Test Connection, Delete, Activate, Save, Cancel.

INCOMING EMAIL TYPES

Incoming email types are managed in your Settings>Application Settings tab

PropertyIQ Strata          Currently Logged in as: admin
Role: Super Administrator
ID: 10123456789

Settings

Company Details | **Application Settings** | Viewings | Supplier Compliance | Mailing House | Portal Integration | Bank Settings | Reminders | File System Related | Cover Pages | Mail Server Settings | Licensing | Connections | SMS | Statistics | PIQ Support

Application Settings

GST Rate: 15.00%

Ask Print Charge: \$2.00

Allow over-writing of Fund Balance (but not Account Balance) ☒

Lock Financials once Final Reports are run ☐

Consolidate GST Accounts ☐

Single Page Arrears Notices ☒ ?

Single Page Final Notices ☒ ?

Single Page Legal Notices ☒ ?

Supplier Transactions Defaults ☐

Hold Approval ☐ ?

Approval ☐ ?

External Approval ☐ ?

☒ Increase Management Fees

Income Tax Rate: 30.00%

Income and Expenditure Report Ordered By: Account Name Account Code

Print Zero Due Reminder Notices: ☒

Print Totals Only on Last Page of Reminder Notices: ☒ ?

Include Opening & Closing Balance on Income & Expenditure Statement report: ☒ ?

Include Co details on Header: ☐

Include Bank Account # on Financial Reports: ☐ ?

Strike Chargeback Levies by Default: ☒ ?

Use Chart of Account Get Applicable Setting: ☒ ?

Budget Settings

Round To: \$8.05 \$1.00

No Rounding on Budgets ☐

Budget Calculation ☐

Expenditure Only ☐

Expenditure Less Income ☐

Levy Income Only ☐

Budget Breakdown Layout ☐ Layout 1 ? ☐ Layout 2 ?

Owner & Contribution Summary Layout ☐ Layout 1 ? ☐ Layout 2 ?

Payment Plan Statement

If you are having difficulties paying your levies, please contact your Strata Manager to discuss payment plan options

Ten Processing

Pre-allocation Rules

When processing a TPN file, these rules determine how each owner deposit will be pre-allocated to the owner's levies. The below rules will be applied in order until one of them matches. Any disabled rule will be skipped.

| Order | Enabled | Rule |
|-------|-------------------------------------|--|
| 0 | <input checked="" type="checkbox"/> | Search for matching direct debit transactions Search for direct debit transactions created via the Billing > Direct Debit screen for levies that have not been fully paid. Matching deposits to the transactions on the exact amount, and the CRN. The allocation will be done according to the details of the direct debit transaction. This rule may not be disabled. |
| 1 | <input checked="" type="checkbox"/> | Allocate credit receipts If all the owner's levies are fully paid, allocate the deposit to credit. This rule may not be disabled. |
| 2 | <input checked="" type="checkbox"/> | Search for matching special levies Search all unpaid special levies (including those in the future), and allocate to the first one exactly matching the deposited amount. |
| 3 | <input type="checkbox"/> | Allocate to the oldest levy group Group all unpaid levies by due date, then allocate to the group of oldest levies if their sum equals the deposited amount. You may not enable both this rule and rule 05 (below). |
| 4 | <input type="checkbox"/> | Allocate to all levies first then back to oldest penalties Allocate to all standard levies first, and paying if necessary. Any remaining amount is allocated to special levies, starting with the oldest and proceeding in date order. Partial allocations will be assigned using the Autofill Settings, below. You may not enable both this rule and rule 05 or rule 06. |
| 05 | <input checked="" type="checkbox"/> | Allocate to levies in due date order, part paying if necessary Starting with the oldest levy and proceeding in date order, fully and/or partly pay levies until the full amount is allocated. Partial allocations will be assigned using the Autofill Settings, below. Enabling this rule causes 100% of identifiable owner deposits to be pre-allocated. You can still review the pre-allocations and modify them if you wish. |

Autofill Settings

These settings determine the order in which partial levy allocations are assigned when using Autofill.

Autofill Order:

- ☒ Interest then principle
- ☐ Principle then interest

Partial Discounts:

Partial discounts may occur when an owner partially pays a levy in advance. This setting controls whether Autofill calculates and applies a pro-rata discount on the portion of the levy received, regardless of this setting.

Autofill partial-pro-rata discounts: ☐

Document Types

Name

Insurance Policy ☐

Agency Agreement ☐

Work Order ☐

Quote ☐

Supplier Invoice ☐

Voting Sheet ☐

Meeting Notice ☐

☒ Add Type ☐ View Type

Incoming Email Types

Name

Voting Sheet ☐

Proxy ☐

Repairs and Maintenance ☐

☒ Add Type ☐ View Type

Utility Line Item Types

| Name | Utility Type | Charge Rate Type | Item Type |
|--------------|--------------|------------------|-----------|
| AC | Electricity | Charge per unit | Sub Meter |
| Hot Water | Gas | Charge per unit | Meters |
| Common | Electricity | Charge per unit | Sub Meter |
| On-Peak | Electricity | Charge per day | Sub Meter |
| Common Water | Water | Charge per unit | Admin Fee |
| Pay TV | Other | Charge per unit | Sub Meter |
| Hot Water | Water | Charge per unit | Sub Meter |

☒ Add Type ☐ View Type

Utility Final Read Statement ?

H1 This is a test for Utility Final Read Statement. H1 This is a test for Utility Final Read Statement. H1 This is a test for Utility Final Read Statement. H1 This is a test for Utility Final Read Statement. H1 This is a test for Utility Final Read Statement.

☐ Edit

Privacy Policy | Terms & Conditions

1. Existing types you have created show here
2. Add type here
3. View and edit a type here

The screenshot shows a window titled 'Incoming Email Types'. It contains a table with a header 'Name' and three rows: 'Voting Sheet', 'Proxy', and 'Repairs and Maintenance'. A purple circle with the number '1' is next to the 'Proxy' row. Below the table, there are two buttons: '+ Add Type' and 'View Type'. A purple circle with the number '2' is above the '+ Add Type' button, and a purple circle with the number '3' is above the 'View Type' button.

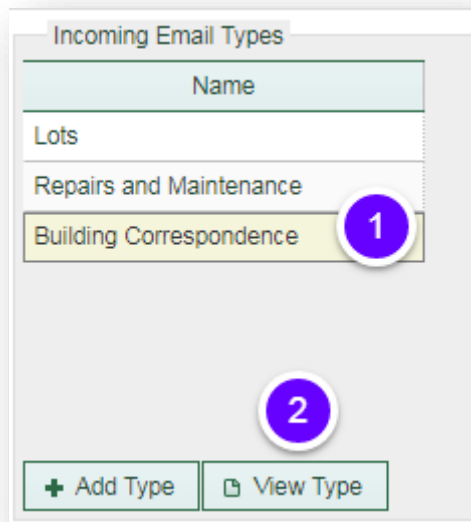
ADD INCOMING EMAIL TYPE

1. *Add Type*
2. Enter a name for the document type
3. *Save*

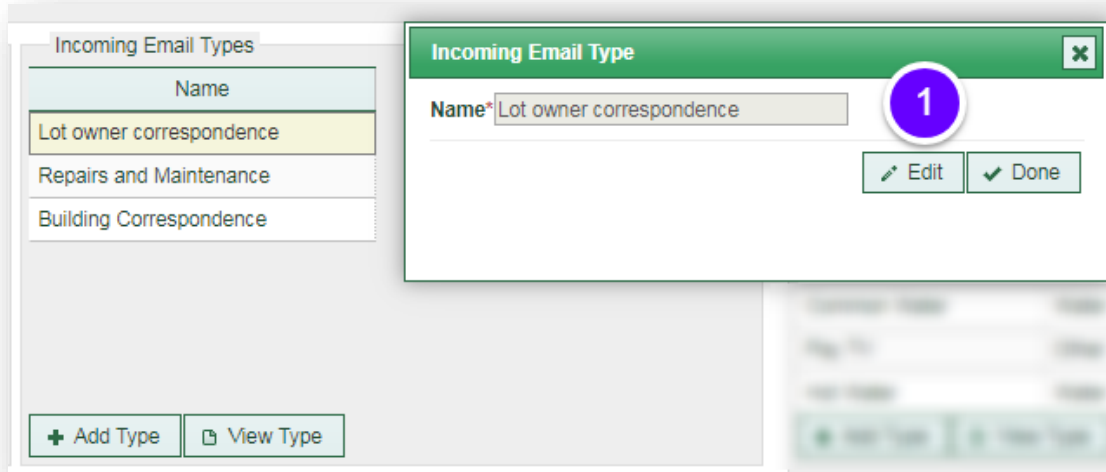
The screenshot shows the 'Incoming Email Types' window in the background. A purple arrow points from the '+ Add Type' button (labeled with a purple circle '1') to a new dialog box titled 'Incoming Email Type'. The dialog box has a green header and a close button (X). It contains a 'Name*' field with the text 'Nomination' (labeled with a purple circle '2'). Below the field are 'Save' and 'Cancel' buttons (labeled with a purple circle '3').

EDIT AN EXISTING INCOMING EMAIL TYPE

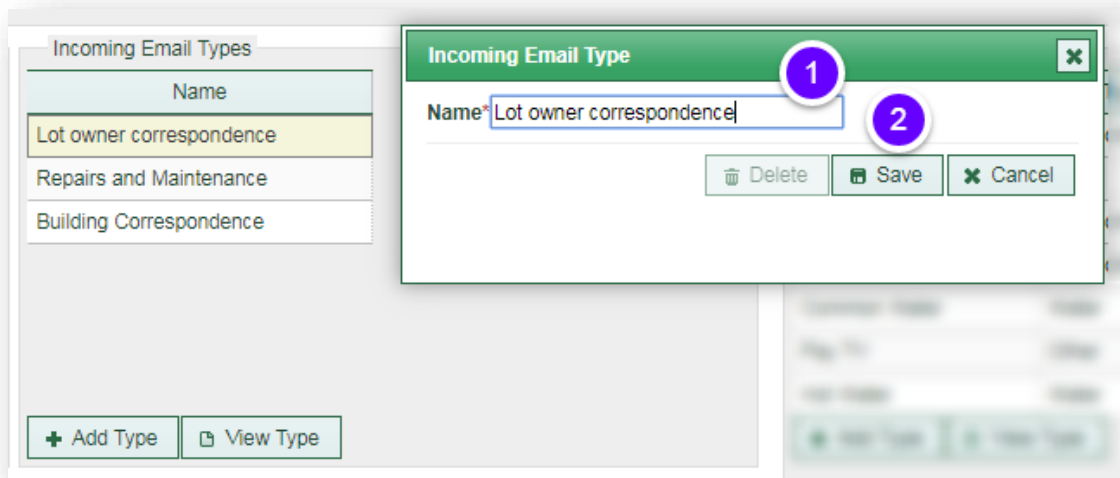
1. Select the item you want to edit
2. *View Type*



1. *Edit*



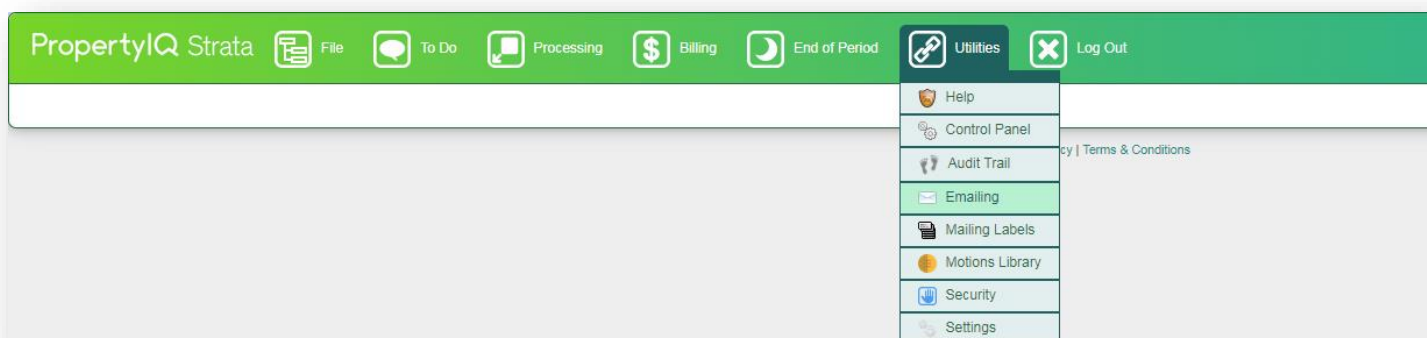
1. Enter your changes
2. *Save*



EMAIL LOGS

The email logs record all incoming emails received from the specified email you set up and all outgoing emails sent from the program.

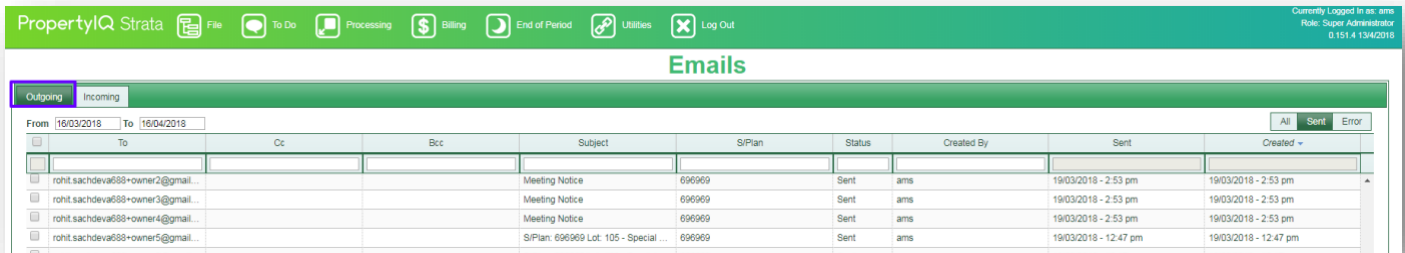
To get started, go to Utilities and select *Emailing*.



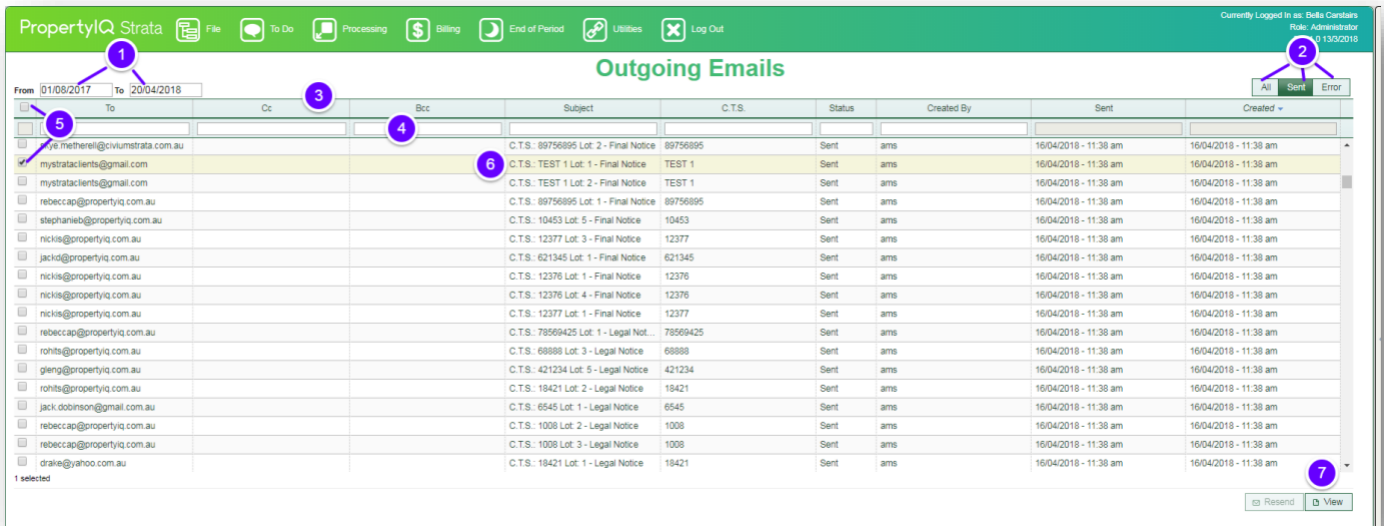
There is a *Resend* button on each emailing screen. This is a placeholder for future development, it doesn't currently function.

OUTGOING EMAILS

The *Outgoing Email* tab is the default tab.




1. The default view is to see all emails for the past month. Click on the boxes to open the calendar and select a date range to filter your view.
2. The default view is to emails that were sent successfully but you can click on the tabs to sort your view to *All* or *Error*
3. Click on a column heading to sort your view by column heading
4. Enter some key letters in any of the empty boxes on the top line to refine your search
5. Click on the boxes on the left of your screen to highlight individual emails or click in the box on the top line to select *All*
6. Click on an item to highlight and then double click *or*
7. Select *View* button at the bottom of the screen



1. The details of the email show here
2. Select the *Additional* accordion to see more details
3. Click on the *Attachments* accordion to see any attachments here – click on the download button to download a PDF copy of the attachment
4. The body of the email shows here.

The screenshot displays the PropertyIQ Strata application interface. On the left, a list of email recipients is shown, with a purple arrow pointing to the email from 'fayeg@propertyiq.com.au'. The main window shows the details of this email. The 'Additional' section (1) displays the email's metadata: Sent Time (10/10/2017 - 1:42 pm), Subject (Annual Levy Notice), To (fayeg@propertyiq.com.au), and Created By (ams). The 'Attachments' section (2) shows a PDF file named 'Annual Levy Notice - 2018.pdf' (30.04 kB) with a 'Download' button. The 'Message' section (3) displays the email body text: 'Please find attached for your records your Owners Corporation notice of contributions for the next budget year. Regards Regina Holsworthy'. The interface also shows a table of sent emails on the right, with columns for 'Sent' and 'Created' times.

INCOMING EMAILS

1. Select the incoming emails tab
2. The date range defaults to the past month, but you can enter any date range you want
3. If you have more than one mailbox in the outgoing email settings, you can click on the drop-down list to select the mailbox you want to view
4. The status defaults to *Read* but you can click on the dropdown list to view emails with other statuses. The choices are:
 - i. All
 - ii. Read
 - iii. Unread
5. You can type some key letters in the box to search for an email(s) that contains a specific subject or text
6. The *Allocation* status defaults to *All* but you can click on the dropdown list to view emails with other allocation statuses. The choices are:
 - i. All
 - ii. Allocated
 - iii. Unallocated
7. The *Allocated By* status defaults to all but you can click on the dropdown list to view emails that have been allocated by an individual user
8. *Folio* defaults to *All* but you can click on the dropdown list to view emails relating to buildings managed by an individual folio
9. The manager defaults to *All* but you can click on the dropdown list to view emails relating to buildings managed by an individual user.
10. When you have finished entering your search criteria, click *Search/Refresh* to view emails that fit your criteria on the screen.
11. *Check now* to search for new emails that haven't yet been allocated.  PropertyIQ doesn't show any new emails automatically. After you click *Check Now*, you need to *Search/refresh* to view any new emails.
12. Click on the boxes on the left to select a single email or click on the box at the top left to select all emails on the screen
13. You can type some key letters in any of the empty boxes on the top line to refine your search.
14. Emails that have not been read show in bold. The email from address shows in this column
15. The email subject shows in this column
16. If the email has been allocated to a building, the strata plan number shows in this column.
17. If the email has been allocated to a lot, the lot number shows in this column
18. If the email has been allocated to a supplier, their name shows in this column
19. If the email has been allocated to a debtor, their name shows in this column
20. The number of attachments to the email shows in this column
21. The date and time the email was received shows here
22. The date and time the email was allocated shows here
23. If you have allocated a type to the email, it shows in this column
24. Hover your mouse over the question mark to see the rules for email auto allocation. (see full instructions below – “How to use auto-allocation to allocate incoming emails”)
25. Select *Run Auto-allocate* if you want PropertyIQ to allocate the selected emails for you. You need to have specific information in the subject line of the email for the auto-allocation to work.
26. Click on the *Allocate* button to allocate selected emails manually (see full instructions below – “How to allocate emails manually”)
27. Click on the *View* button to view the detail of an email (see full instructions below – “Viewing the details of an email”)

Emails

Outgoing

Incoming

From

01/09/2018

To

11/12/2018

Mailbox

All

Read

All

Message or Subject

Allocated

All

Allocated By

All

Folio

All

Manager

All

Search / Refresh

Check Now

| | From | Subject | S/Plan | Lot No | Supplier | Debtor | Attachments | Received | Allocated | Incoming Email Type |
|-------------------------------------|---------------------------------------|--|--------|--------|-------------------|----------------|-------------|----------------------|----------------------|--------------------------|
| <input checked="" type="checkbox"/> | Faye Goodman <fayeg@proper... | Repairs to our ceiling - 15 Jachelor ... | | | | | 0 | 10/12/2018 - 8:49 am | | |
| <input type="checkbox"/> | Property IQ <rohits@propertyiq.com... | Financial reports - The Bachelor Pad... | 1 | | | | 2 | 05/12/2018 - 8:07 pm | 05/12/2018 - 8:43 pm | Repairs and Maintenance |
| <input type="checkbox"/> | Property IQ <rohits@propertyiq.com... | Minutes - Peppermint Gardens SP 99 | 99 | | | | 1 | 05/12/2018 - 8:07 pm | 05/12/2018 - 8:44 pm | Building Correspondence |
| <input type="checkbox"/> | Property IQ <rohits@propertyiq.com... | FWD: Remittance Advice | | | Jonos Maintenance | | 1 | 05/12/2018 - 8:00 pm | 05/12/2018 - 8:43 pm | Repairs and Maintenance |
| <input type="checkbox"/> | Property IQ <rohits@propertyiq.com... | FWD: SIPlan: 161616 Lot: 1 - Specia... | 161616 | 1 | | | 1 | 05/12/2018 - 7:57 pm | 05/12/2018 - 8:43 pm | Lot owner correspondence |
| <input type="checkbox"/> | Property IQ <rohits@propertyiq.com... | FWD: Debtor Statement | | | | Big Billboards | 1 | 05/12/2018 - 7:57 pm | 05/12/2018 - 8:47 pm | Repairs and Maintenance |
| <input type="checkbox"/> | Property IQ <piq@test.com.au> | SIPlan: 555 Lot: 501 - Special Notice... | 555 | | | | 1 | 21/09/2018 - 4:44 pm | 05/12/2018 - 3:21 pm | |
| <input type="checkbox"/> | Property IQ <piq@test.com.au> | FWD: SIPlan: 555 Lot: 503 - Special ... | | | | | 1 | 21/09/2018 - 4:37 pm | | |

1 selected of 8 rows

Run Auto-Allocate

Allocate

View

HOW TO ALLOCATE EMAILS MANUALLY

When you click on the allocate button you will see the option to allocate an email you have selected on the screen to a Building, Lot, Supplier or Debtor.

To allocate to a Building:

1. Highlight the email you want to allocate
2. Select *Allocate*
3. Select *Building* and then click on the search icon
4. Find and select the building you want to allocate the email to

The screenshot displays the PropertyIQ Strata Emails interface. The top navigation bar includes links for File, To Do, Processing, Billing, End of Period, Reporting, Utilities, Help, and Log Out. The main content area is divided into two panes: 'Emails' on the left and 'Buildings' on the right. The 'Emails' pane shows a list of incoming emails. One email is selected, and the 'Allocate Emails' dialog box is open, allowing the user to allocate the email to various entities. The 'Buildings' pane shows a list of buildings with columns for S/Plan, Building Name, Street Name, Suburb, State, Postcode, Manager, Lots, and Folio. A search icon is visible in the top right corner of the 'Buildings' pane. The 'Allocate Emails' dialog box has a search icon in the top right corner. The 'Buildings' pane has a search icon in the top right corner. The 'Allocate Emails' dialog box has a search icon in the top right corner.

Emails

Outgoing Incoming

From: 10/11/2018 To: Mailbox: All Read: All Message or Subject: All

Allocated: All Allocated By: All Folio: All Manager: All

| | From | Subject | S/Plan | Lot No | Supplier | Debtor |
|-------------------------------------|-------------------------------------|---|--------|--------|----------|--------|
| <input checked="" type="checkbox"/> | Property IQ <rohits@propertyiq.com> | Financial reports - The Bachelor Pad SP 1 | 1 | | | |
| <input type="checkbox"/> | Property IQ <rohits@propertyiq.com> | FWD: Debtor | | | | |
| <input type="checkbox"/> | Property IQ <rohits@propertyiq.com> | FWD: Remittance | | | | |
| <input type="checkbox"/> | Property IQ <rohits@propertyiq.com> | FWD: S/Plan | | | | |
| <input type="checkbox"/> | Property IQ <rohits@propertyiq.com> | Minutes - Pepp... | | | | |
| <input type="checkbox"/> | Faye Goodman <faye@propertyiq.com> | Repairs to ou... | | | | |

1 selected of 6 rows

Allocate Emails

Allocate one email to the following entities

☒ Building

☐ Lot

☐ Supplier

☐ Debtor

Incoming Email Type

Buildings

| | S/Plan | Building Name | Street Name | Suburb | State | Postcode | Manager | Lots | Folio |
|----|--------|-----------------------|---------------------|-----------------|-------|----------|------------------|------|--------|
| 1 | | The Bachelor Pad | 1-8 Hollywood Drive | MURWILLUMBAH | NSW | 2556 | Rohit Sachdeva | 11 | QL... |
| 4 | | Penrith Plaza | 1 Smith | BAYBROOK | NSW | 2750 | Anne Flava | 2 | Ro... |
| 5 | | Wayne Tower | 3 East Avenue | GLENELG | VIC | 6000 | Rohit Sachdeva | 5 | QL... |
| 6 | | Belair Apartments | 1 Vulcan Drive | WATSON | NSW | 2602 | Ashley Jones | 3 | SA... |
| 7 | | Moonee Towers | 1-3 Lennox Street | MOONEE PONDS | NSW | 3039 | Jack Dobinson | 1 | Ro... |
| 8 | | KICs | 15 Fifth Avenue | BELLAVUE HILLS | NSW | 2023 | Ashley Jones | 1 | NS... |
| 9 | | The Terrace | 235 St Georges Tce | PERTH | WA | 6000 | Stephanie Schipp | 3 | WA... |
| 10 | | Ablum | 13 Mire Drive | CROYDON | NT | 3072 | Training Manager | 9 | B F... |
| 11 | | The Plaza | 252 David Street | KEILOR | QLD | 3225 | Ashley Jones | 2 | VIC... |
| 12 | | Riverside | Roma Road | HAMILTON | QLD | | Jack Dobinson | 54 | Ro... |
| 13 | | Open Lane | 1-3 Open Lane | BRISBANE | NSW | | Jack Dobinson | 6 | QL... |
| 14 | | Smith Street Building | 1 Smith Street | BRISBANE | SA | 4000 | Ashley Jones | 5 | TA... |
| 15 | | Paper Street House | 537 Paper Street | BARDFORD | QLD | 4000 | Ashley Jones | 5 | C F... |
| 17 | | Isaacs | 235 1st Ave | INDOORILLY | QLD | 4112 | Ashley Jones | 4 | |
| 18 | | Opal House | 12 Opal Ridge Drive | BRISBANE | QLD | 4000 | Jack Dobinson | 0 | QL... |
| 19 | | | 1 George Street | BRISBANE | QLD | | Jack Dobinson | 4 | |
| 20 | | Malvern Grove | 44 Malvern Parade | THE POST OFFICE | NSW | | Rohit Sachdeva | 8 | |
| 22 | | CTS22 | Street | SUBURB | VIC | | Marcus Bottomley | 1 | |

Show Legend

Choose the email type. (Optional) Tick *Incoming Email Type*. The available types are determined by the types you created in your Settings>Application Settings.

Allocate Emails

Allocate one email to the following entities

☒ Building 1 The Bachelor Pad 1-8 Hollywood Drive

☐ Lot

☐ Supplier

☐ Debtor

☒ Incoming Email Type

Clear Allocations Save Close

Lot owner correspondence
Repairs and Maintenance
Building Correspondence

To allocate to a Lot

To allocate to a lot, you first need to select the building, but don't click *Save*

1. Click on the box beside Lot and then
2. Use the search icon to search for the lot you want. You now see all the lot owners for the selected Building.
3. Select the lot you want to allocate to

Allocate Emails

Allocate one email to the following entities

☒ Building 1 The Bachelor Pad 1-8 Hollywood Drive

☒ Lot

☐ Supplier

☐ Debtor

☐ Incoming Email Type

Clear Allocations Save Close

Lots

| S/Plan | Lot | Unit | CRN | Owner | Street | Street Name | Building Name | Strata Manager Name | Corr. | Delve |
|--------|-----|------|----------|------------------------|--------|-----------------|------------------|---------------------|-------|-------|
| 1 | 1 | 1 | 00000... | Owen Owner | 10 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 2 | 2 | 00000... | Ming Hwang & Hsu Huang | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Other | Email |
| 1 | 3 | 3 | 00000... | Brena Mulligan | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Agent | Email |
| 1 | 4 | 7 | 00000... | Kim Kardashian | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Email |
| 1 | 5 | 5 | 00000... | Edward McManus | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 7 | 7 | 00000... | Ricky McAlister | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 8 | 8 | 00000... | Kanav Gouden | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 10 | | 00000... | Edward McManus | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 11 | 11 | 00000... | Jasmine Houlahan | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 12 | 12 | 00000... | Jasmine Houlahan | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 13 | 13 | 00000... | Penny Gardner | 1-7 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 29 | 29 | 00000... | Dante Waterman | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 33 | 33 | 00000... | Brena Mulligan | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 99 | 99 | 00000... | Jocelyn Dante | 1 | Hollywood Drive | The Bachelor Pad | Rohit Sachdeva | Owner | Post |
| 1 | 26 | 26 | 00000... | Edward McManus | 1 | Ingram Place | The Bachelor Pad | Rohit Sachdeva | Owner | Post |

Show Legend Import Add Edit Select Close

Choose the email type. (Optional) Tick *Incoming Email Type*. The available types are determined by the types you created in your Settings>Application Settings.

To Allocate to a Supplier

1. Select *Allocate*
2. Click on the box beside Supplier and use the search icon to find the supplier
3. Double click on the supplier to select them

Choose the email type. (Optional) Tick *Incoming Email Type*. The available types are determined by the types you created in your Settings>Application Settings

Allocate Emails

Allocate one email to the following entities

☐ Building

☐ Lot

☒ Supplier

☐ Debtor

☒ Incoming Email Type

Clear Allocations Save Close

Lot owner correspondence
Repairs and Maintenance

To Allocate to a Debtor

1. Select *Allocate*
2. Click on the box next to Debtor and then use search icon to find the debtor you want
3. Double click on the debtor

Debtors

| Name | Debtor C... | Balance | Phone | Mobile | Email | S/Plan | Lot | Owner Na... |
|----------------|-------------|--------------|-------------|------------|-------------|--------|-----|-------------|
| Fletchers... | FLET | \$230.00 | | | | | | |
| Optus | OPTUS | \$5,044.00 | | | | | | |
| Active Bill... | ACTIVE | \$200.00 | | | nickis@p... | | | |
| Annie's Fl... | ANN | \$130.00 | | | | | | |
| Borensons | BORE | \$250.00 | | | 19_email... | | | |
| Citywide ... | SBUSS | \$5,394.00 | | 0456877... | 20_email... | | | |
| Stocklan... | 555111 | \$100.00 | | | | | | |
| Telstra | TELSTRA | \$127.00 | test | test | 22_email... | | | |
| 222222 | 222222 | \$0.00 | | | | | | |
| Great No... | KEY FOB | \$300.00 | | | | | | |
| Jack's De... | JACK | \$4,613.39 | | | 25_email... | | | |
| Ramsay ... | 1234567... | \$0.00 | | | | | | |
| My Foun... | 1 | \$0.00 | 02 8306 ... | | 27_email... | | | |
| Coca Cola | COCA | -\$165.00 | | | 28_email... | | | |
| Franca S... | GG | -\$399.86... | | | 29_email... | | | |
| Porepunk... | PORE | \$0.00 | | | | | | |
| Property I... | PIQST | \$0.00 | | | | | | |

Allocate Emails

Allocate one email to the following entities

☐ Building

☐ Lot

☒ Debtor

☐ Incoming Email Type

Clear Allocations Save Close

1 Run Auto-Allocate Allocate View

Choose the email type. (Optional) Tick *Incoming Email Type*. The available types are determined by the types you created in your Settings>Application Settings

Allocate Emails

Allocate one email to the following entities

☐ Building

☐ Lot

☐ Supplier

☒ Debtor Porepunkah

☒ Incoming Email Type

Clear Allocations Save Close

Lot owner correspondence
Repairs and Maintenance
Building Correspondence

HOW TO USE AUTO ALLOCATION TO ALLOCATE INCOMING EMAILS

You can allow the program to auto allocate emails based on the subject line of the email. Emails that have the required text in the subject line allocate automatically when they are received. When you hover your mouse over the question mark beside the auto allocate button, you will see the following message explaining how the program auto allocates emails.

Auto-allocation depends on text found in the email subject

To allocate to a building include:
[[splan]]

To allocate to a building and lot include:
[[splan / lot]]

To allocate to a supplier include:
((supplier-code))

To allocate to a debtor include:
{{debtor-code}}

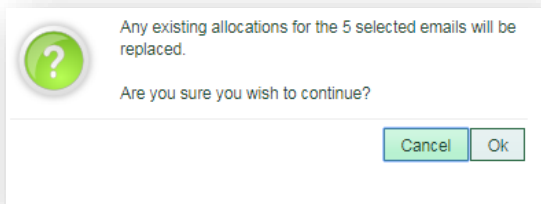
Spaces in the rules are allowed, but not required

More than one rule may be included in the subject
eg [[bld1/lot1]] ((supp1))

You can also prompt auto allocations. After selecting the emails on screen that you want to allocate, select *Run Auto Allocate*.

The pop up reminds you that any existing auto allocations will be over written.

Ok to confirm that you want to continue.



The selected emails are now auto allocated.

VIEWING THE DETAILS OF AN EMAIL

1. Click on the email you want to view, to open it
2. The *From*, *Subject* and *To* details show in this section
3. Click on *Additional* to view additional details
4. The body of the message shows here
5. You can delete the incoming email by selecting the delete button
6. *Allocate* to allocate the email manually (see full instructions above – “How to allocate emails manually”)
7. *Mark Unread* to change its status to unread.
8. *Close* to close the email

PropertyIQ Strata

File To Do Processing Billing End of Period Utilities Log Out

Currently Logged In as: sms
Role: Super Administrator
0.151.4.13/4/2018

| From | To | Subject | SiPlan | Lot |
|--------------------------|--------------------------|--|--------|-----|
| fyayeg@propertyiq.com.au | fyayeg@propertyiq.com.au | Debtor Invoice Active Billboards | 888777 | 2 |
| fyayeg@propertyiq.com.au | fyayeg@propertyiq.com.au | Lot 2 SP 888777 | 888777 | 2 |
| fyayeg@propertyiq.com.au | fyayeg@propertyiq.com.au | Hornsby Towers 888777 Supplier Invoice - ... | 888777 | 2 |
| fyayeg@propertyiq.com.au | fyayeg@propertyiq.com.au | SP 888777 Hornsby Towers | 888777 | 2 |
| piqemailtest@gmail.com | piqemailtest@gmail.com | [[999*1]] ((AAA)) ((BIG)) | 999 | 1 |
| piqemailtest@gmail.com | piqemailtest@gmail.com | Fwd: [[999*1]] ((AAA)) ((BIG)) | 999 | 1 |
| piqemailtest@gmail.com | piqemailtest@gmail.com | [[999*1]] ((AAA)) ((BIG)) | 999 | 1 |
| piqemailtest@gmail.com | piqemailtest@gmail.com | Integrated attachment email | 999 | 1 |
| piqemailtest@gmail.com | piqemailtest@gmail.com | Test Incoming with attachments | 999 | 1 |
| piqemailtest@gmail.com | piqemailtest@gmail.com | Test Incoming Email with Body | 999 | 1 |

1 selected of 10 rows

Run Auto-Allocate Allocate View

Email

From: fyayeg@propertyiq.com.au
Subject: Debtor Invoice Active Billboards
Sent To: gmail test

Additional

To: piqemailtest@gmail.com <piqemailtest@gmail.com>
Sent Time: 16/04/2018 - 8:17 pm
Received Time: 16/04/2018 - 8:17 pm
Allocated By: sms
Debtor: Active Billboards

Message

Currently displaying the text version of the message.
If you trust the sender and want to view the original formatted message, click here.

Dear Anne,
Could you please provide a copy of my last invoice?

Kind regards,
Jane Cruickshank
Big Billboards

Delete Allocate Mark Unread Close

VIEWING OUTGOING EMAILS FOR A BUILDING FROM THE BUILDING CARD – EMAILS TAB

1. The outgoing emails tab is the default, but you can click on the incoming tab to view incoming emails
2. *Sent Emails* is the default view, but you can select the *All* tab to view emails with any status or the *Error* tab to view emails with error status.
3. The default date range is for the past month, but you can click in the boxes to open the calendar and enter a different date range.
4. Click on a column heading to order the screen by that heading
5. Type some key letters in any of the boxes on the top line to refine your search
6. Click on an email to highlight and then double click to open it *or*
7. Click View to view an email that has been highlighted on the screen

The screenshot shows the 'Building' card interface in PropertyIQ. The 'Emails' tab is selected in the top navigation bar. The 'Outgoing' sub-tab is active, showing a list of sent emails. The interface includes various filters and a table of email records.

Building Information:

- S/Plan*: 888777
- Manager*: Training Manager
- Folio*: Group B Folio
- Building Type*: Strata
- Building Sub Type*: Residential
- Building Class:
- Total UOE*: 220
- Active: ☒ All Inclusive Fees: ☐
- Debt Collection: ☒ Payment Plan: ☐

Address:

- Street No: 15
- Street Name*: Florence
- Address 2:
- Suburb: HORNSBY
- State*: NSW
- Building Name: Hornsby Towers
- P/Code: 2077
- Formal Tenancy 38.46%

Emails Tab:

- 1. Settings button
- 2. Log of Changes button
- 3. Date range filter: From 19/03/2018 To 19/04/2018
- 4. 'To' column header
- 5. 'Cc' column header
- 6. Email row (highlighted)
- 7. View button

| | To | Cc | Bcc | Subject | Status | Created By | Sent | Created |
|-------------------------------------|-----------------------|----|-----|----------------|--------|------------|-----------------------|-----------------------|
| <input checked="" type="checkbox"/> | mystatacustomers@g... | | | Meeting Notice | Sent | ams | 13/04/2018 - 12:03 pm | 13/04/2018 - 12:03 pm |
| <input type="checkbox"/> | anna@gmail.com | | | Meeting Notice | Sent | ams | 13/04/2018 - 12:03 pm | 13/04/2018 - 12:03 pm |
| <input type="checkbox"/> | mystatacustomers@g... | | | Meeting Notice | Sent | ams | 13/04/2018 - 12:03 pm | 13/04/2018 - 12:03 pm |
| <input type="checkbox"/> | mystatacustomers@g... | | | Meeting Notice | Sent | ams | 13/04/2018 - 12:03 pm | 13/04/2018 - 12:03 pm |

1 selected

Buttons: Resend, View

Bottom Bar: Opening Balances, Info Certificates, Schedules, Financial Reports, Edit, Done

VIEWING INCOMING EMAILS FOR A BUILDING FROM THE BUILDING CARD – EMAILS TAB

1. The default view is outgoing emails, select the *Incoming* tab to view incoming emails
2. The default date range is for the past month, but you can click in the empty boxes to open the calendar and select a date range
3. If you have more than one incoming mailbox, you can click on the dropdown and select the emails from individual mailboxes
4. The default read status is All, but you can click on the dropdown list to select emails with unread status
5. Type some key letters in the box to refine your email search
6. *Search/Refresh* to view any new emails that have been allocated to the building that fit the criteria you have entered.
7. Click on an email to highlight it on the screen then double click to open the email
8. Hover your mouse over the question mark to see information about auto allocation. (See full instructions above “How to use Auto Allocation to allocate incoming emails”)
9. Select *Run Auto Allocate* to allocate any email(s) selected on the screen. (See full instructions above “How to use Auto Allocation to allocate incoming emails”)
10. Select *Allocate* to manually allocate the email(s) select on the screen. (See full instructions above “How to manually allocate emails”.)
11. *View* to view an email that has been highlighted on screen – or you can double click on the highlighted email

Building

S/Plan* 888777
Manager* Anna
Folio*
Building Type* Strata
Building Sub Type* Residential
Building Class
Total UOE* 240
Active ☒ **All Inclusive Fees** ☐
Debt Collection ☒ **Payment Plan** ☐

Address
Street No 15 **Street Name*** Florence
Address 2
Suburb HORNSBY **State*** NSW
Building Name Hornsby Towers **P/Code** 2077
Formal Tenancy 38%

Settings **Data** **Charges** **Info** **Financials** **Budget** **Notes** **Documents** **Registers** **Alerts** **Work Orders** **Insurance Claims** **Emails** **Log of Changes**

Outgoing **Incoming**

From 01/06/2018 **To** **Mailbox** All **Read** All **Message or Subject** **Search / Refresh**

| | From | Subject | Lot No | Supplier | Debtor | Attach... | Received | Incoming Email Type |
|-------------------------------------|--------------------------|------------------------------|--------|------------------|--------|-----------|-----------------------|---------------------|
| <input type="checkbox"/> | Faye Goodman <fayeg@...> | Repairs to Roof - Strata ... | 1 | | | 0 | 11/12/2018 - 3:21 pm | |
| <input checked="" type="checkbox"/> | Faye Goodman <fayeg@...> | Follow up on maintenanc... | 1 | Hard Workers Ltd | | 0 | 08/06/2018 - 3:13 pm | |
| <input type="checkbox"/> | Faye Goodman <fayeg@...> | [[888777/1]] | 1 | | | 0 | 04/06/2018 - 4:31 pm | |
| <input type="checkbox"/> | Faye Goodman <fayeg@...> | [[888777/1]] | 1 | | | 0 | 04/06/2018 - 11:35 am | |
| <input type="checkbox"/> | Faye Goodman <fayeg@...> | RE [888777/1] | | Hard Workers Ltd | | 0 | 04/06/2018 - 11:33 am | |

1 selected of 5 rows

Run Auto-Allocate **Allocate** **View**

Opening Balances **Info Certificates** **Schedules** **Financial Reports** **Edit** **Done**

VIEWING OUTGOING EMAILS FOR A LOT OWNER FROM THE LOT OWNER CARD - EMAILS TAB

1. The default view is the outgoing emails tab, you can click on the Incoming tab to view incoming emails.
2. The default view is for the past month, but you can click on the boxes to open the calendar and refine your view
3. The default view is *Sent* emails, but you can toggle between tabs to view emails with all statuses or the error tab to view emails with errored status
4. Click on a column heading to sort by that column
5. Type some key letters in any of the empty boxes on the top line to refine your search
6. Click on an item to highlight it on the screen and then double click to select it *or*
7. Click the View button on the bottom of the screen

Lot Owner

S/Plan* 888777 Hornsby Towers 15 Florence

Lot* 1 Unit* 1 Street No 15

Street Name* Florence

Suburb* HORNSBY

Accessory Unit

UOE* 20

CRN 0000000294

Owner Info

Owner Name* Franca Swanden

(Ah) Email 269_email@deadend.piq

(Bh) Salutation

Mobile 0423 324 343 Contact Name

Fax Paid to 30/09/2016 Last Settled

Committee Member: Y Committee Member Status: Active

Change Owner

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS **Emails** Log of Changes

Outgoing Incoming

From 04/09/2017 To 17/04/2018

All Sent Error

| | To | Cc | Bcc | Subject | Status | Created By | Sent | Created |
|-------------------------------------|----------------|----|-----|----------------|--------|------------|-----------------------|-----------------------|
| <input checked="" type="checkbox"/> | anna@gmail.com | | | Meeting Notice | Sent | ams | 13/04/2018 - 12:03 pm | 13/04/2018 - 12:03 pm |

1 selected

Resend View

Lot Owner Page Email Info Certificate Last Info Certificate Edit Done

VIEWING INCOMING EMAILS FOR A LOT OWNER FROM THE LOT OWNERS CARD – EMAILS TAB

1. The default view is *Outgoing* emails, but you can click on the incoming tab to view incoming emails.
2. The default view is for the past month, but you can click on the boxes to enable the calendar and enter a different date range
3. If you have more than one incoming mailbox, you can click on the dropdown and select the emails from individual mailboxes
4. The default read status is *All*, but you can choose unread to view emails with unread status
5. Type some key letters in the message or subject box to search for emails with those words in their message or subject
6. *Search/Refresh* to view any new emails that have been allocated to the building that fit the criteria you have entered.
7. Click on an email to highlight it on the screen and then double click to open the email
8. Hover your mouse over the question mark to see information about auto allocation. (See full instructions above “How to use Auto Allocation to allocate incoming emails”)
9. Select *Run Auto Allocate* to auto allocate the email(s) selected on the screen. (See full instructions above “How to use Auto Allocation to allocate incoming emails”)
10. Select *Allocate* to manually allocate the email(s) select on the screen. (See full instructions above “How to manually allocate emails”).
11. *View* to open an email that has been highlighted on screen

Lot/Owner

S/Plan* 888777 Hornsby Towers 15 Florence

Lot* 1 Unit* 1 Street No* 15

Street Name* Florence

Suburb* HORNSBY

Accessory Unit

UOE* 40

CRN 0000000294

Owner Info

Owner Name* Franca Swanden

(Ah)

(Bh)

Mobile 0423 324 343

Fax

Committee Member: Y

Email fayeg@propertyiq.com.au; fayelynetgoodman@

Salutation

Contact Name

Paid to 22/07/2017 Last Settled 01/11/2018

Committee Member Status: Active

Change Owner

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS **Emails** Log of Changes

Outgoing Incoming

From 01/02/2018 To 12/12/2018 Mailbox All Read All Message or Subject Search / Refresh

| | From | Subject | S/Plan | Supplier | Debtor | Attach... | Received | Incoming Email Type |
|-------------------------------------|--------------------------|-------------------------------|--------|----------|--------|-----------|-----------------------|---------------------|
| <input checked="" type="checkbox"/> | Faye Goodman <fayeg@...> | Repairs to Roof - Strata ... | 888777 | | | 0 | 11/12/2018 - 3:21 pm | |
| <input type="checkbox"/> | Faye Goodman <fayeg@...> | [[888777/1]] | 888777 | | | 0 | 04/06/2018 - 4:31 pm | |
| <input type="checkbox"/> | Faye Goodman <fayeg@...> | [[888777/1]] | 888777 | | | 0 | 04/06/2018 - 11:35 am | |
| <input type="checkbox"/> | fayeg@propertyiq.com.au | Lot 1/15 Florence Street, ... | 888777 | | | 0 | 17/04/2018 - 2:08 pm | |

1 selected of 4 rows

Run Auto-Allocate Allocate View

VIEWING OUTGOING EMAILS FOR A SUPPLIER FROM THE SUPPLIER CARD – EMAILS TAB

1. The outgoing tab is the default, but you can click on the incoming tab to view incoming emails
2. The default view is for the past month, but you can click on the boxes to open the calendar and select a date range
3. The default view is Sent emails, but you can toggle between tabs to view emails with all statuses or error to view emails with error status
4. Type some key letters in any of the empty boxes on the top line to refine your search
5. Click on an item to highlight it on the screen and then double click to select it *or*
6. Click the View button on the bottom of the screen

Supplier

ABN

34323432

Name*

Jack of All Trades

Code

JACK

Check Ref Inv.

☒

GST Registered

☒

Active

☒

Sundry Supplier

☐

License No.

Balance

\$45,300.00

Contact

Address

1 Bolero Drive

Suburb

AMBERLY

State

QLD

Postcode

4092

Contact

Phone 1

Phone 2

Mobile

0423945443

Fax

Accounts Email

100000020_email@deadend.piq

Work Orders Email

mystrataclients@gmail.com

Email remittances

☒

Email Tender Requests

☒

Settings

1

Notes

Documents

Compliance

Alerts

SMS

Emails

Log of Changes

Outgoing

2

Incoming

From

19/03/2018

To

All

3

Sent

Error

| | To | Cc | 4 | Bcc | Subject | Status | Created By | Sent | Created |
|-------------------------------------|---------------------------|-----------------------|---|----------------|---------------------------|--------|------------|----------------------|----------------------|
| <input type="checkbox"/> | mystrataclients@gmail.... | 100000059_email@de... | | | Work Order - S/Plan 1 ... | Sent | ams | 19/04/2018 - 4:39 pm | 19/04/2018 - 4:39 pm |
| <input checked="" type="checkbox"/> | mystrataclients@gmail.... | 100000059_email@de... | 5 | 100000054_e... | Work Order - S/Plan 1 ... | Sent | ams | 19/04/2018 - 4:38 pm | 19/04/2018 - 4:38 pm |

1 selected

6

Resend

View

VIEWING INCOMING EMAILS FOR A SUPPLIER FROM THE SUPPLIER CARD – EMAILS TAB

1. The default view is *Outgoing* emails, but you can click on the incoming tab to view incoming emails.
2. The default view is for the past month, but you can click on the boxes to enable the calendar and enter a different date range
3. If you have more than one incoming mailbox, you can click on the dropdown and select the emails from individual mailboxes
4. The default read status is *All*, but you can choose unread to view emails with unread status
5. Type some key letters in the message or subject box to search for emails with those words in their message or subject
6. *Search/Refresh* to view any new emails that have been allocated to the building that fit the criteria you have entered.
7. Click on an email to highlight it on the screen and then double click to open the email
8. Hover your mouse over the question mark to see information about auto allocation. (See full instructions above “How to use Auto Allocation to allocate incoming emails”)
9. Select *Run Auto Allocate* to auto allocate the email(s) selected on the screen. (See full instructions above “How to use Auto Allocation to allocate incoming emails”)
10. Select *Allocate* to manually allocate the email(s) select on the screen. (See full instructions above “How to manually allocate emails”)
11. *View* to open an email that has been highlighted on screen

Supplier

ABN 34323432
Name* Jack of All Trades
Code JACK
Check Ref Inv. ☒ GST Registered ☒
Active ☒ Sundry Supplier ☐
License No.
Balance \$45,706.00

Contact
Address 1 Bolero Drive
Suburb AMBERLY State QLD
Postcode 4092
Contact
Phone 1
Phone 2
Mobile 0423945443 Fax
Accounts Email
Work Orders Email
☐ Email remittances
☐ Email Tender Requests

Settings Ledger **1** Notes Documents Compliance Alerts SMS **Emails** Log of Changes

Outgoing Incoming **2**

From 01/07/2018 To 12/12/2018 Mailbox All **3** Read All **4** Message or Subject **5** Search / Refresh **6**

| | From | Subject | SI/Plan | Lot No | Debtor | Attachm... | Received | Incoming Email Type |
|-------------------------------------|--|---------|---------|--------|--------|------------|----------------------|---------------------|
| <input checked="" type="checkbox"/> | Faye Goodman <fayeg@pr...> ((JACK)) 7 | | | | | 0 | 11/12/2018 - 3:24 pm | |

1 selected of 1 rows

8 ? **9** Run Auto-Allocate **10** Allocate **11** View

DOCUMENTS THAT ARE RECEIVED AS INCOMING EMAIL ATTACHMENTS

Documents that are received as incoming email attachments are automatically allocated to a document type called *Incoming Email Attachments* and will be seen when viewing:

- Meeting Notice Attachments
- Insurance claim - policy attachments
- Adding attachments to custom merge templates (file > lots > merge button)

They don't show when viewing:

- File > Documents
- Building > Documents Tab
- Lot Owner Card > Documents Tab
- Supplier Card > Documents Tab
- Debtor Card > Documents Tab