PropertyIQ

Settings

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INTRODUCTION TO SETTINGS

The Settings area allows you to configure PropertyIQ for your needs. You can enable/disable system behaviour, set reporting and template preferences, setup integration connections and more.

This area is normally accessed by administrator users. You can manage access to Settings via user permissions and roles. See the manual "Users, Roles and Permissions" for full details.

GETTING STARTED WITH SETTINGS

To get started, go to the Utilities menu and Select Settings.

1. By default, the global settings (for your whole company) show on this page. If you use folios and you want to be able to generate documents and ABA Files with different details for each folio, you can select each folio from the dropdown list to update details. (see *Folio Settings* below)
2. These are the details that will appear on all documents generated from PropertyIQ
3. Select *Upload Logo* to upload your company's logo. The recommended size is 250 px X 60 px and the format should be JPEG or PNG . Find the saved file on your computer and click on it to select.
4. Select here to include an optional disclaimer on reports generated in PIQ. The disclaimer text will appear as a statement in report headers for reports that include company details.
5. This is the remitter name that appears on your ABA files.
6. Select from the dropdown list to select your time zone
7. Select from the dropdown list to choose a default label type. Label types are added in the Mailing Labels area. For full details, see the manual "Mailing Labels"
8. Select here to enable emailing annual levy notices. If this is ticked, annual levy notices will be emailed to lot owners when they are generated as part of the budget acceptance process. This will apply to all buildings you manage or to all buildings in a folio if you are editing folio settings.
9. Select here to send annual levy notices with AGM Minutes. If this is selected, the annual levy notice becomes the cover page of your AGM minutes. This will apply to all buildings you manage or to all buildings in a folio of you are editing folio settings. You can have one or both options ticked.
10. *Save*

FOLIO SETTINGS

If you use Folios, you can utilise the folio settings so that the information that is merged onto documents comes from the folio settings. For example, this is useful if your company has different locations with different Directors and you want your Information Certificates and other documents to show differently for each Portfolio. To utilise this function, your Building Manager's role will need to have Folio specific data enabled.   For full details, see the Manual "Users, Roles and Permissions"

1. Find the folio you want from the dropdown list. Note: Folios are created from the building card, by selecting the Folios box on the top left of the building card.
2. Ensure the *Use Folio Company details* box is ticked (it will be unticked by default)
3. You can edit the folio details here.
4. You can upload a different logo for this folio.
5. You can enable, disable or set a report disclaimer for this folio here.
6. You can edit the details here if you want them to be different for this folio.

NOTE If you are using the folio option, the merge fields that will be used in your documents and certificates are:
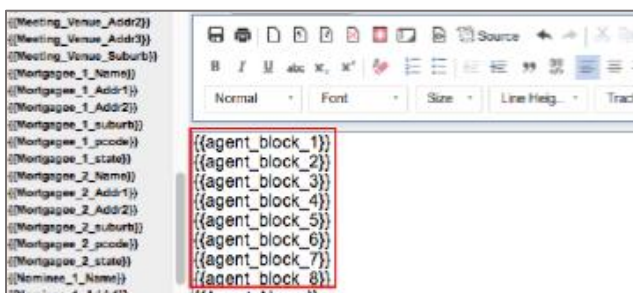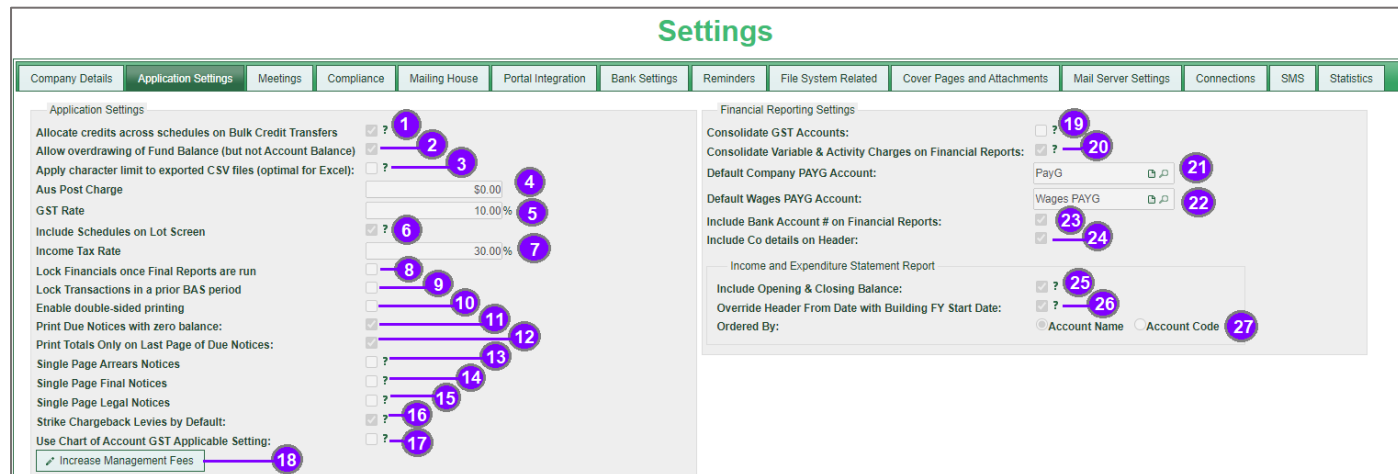

For full information about merging, see the manual "Templates"

The application settings screen contains settings that determine functionality across a number of areas in PropertyIQ. See the details for each section below

Select the ✏ Edit button on the bottom right of your screen to edit your Application Settings

GENERAL

1. Select here if you want to allocate lot credits across schedules using the standard allocation rules (see *TXN file processing settings* below). When this is not selected, credit balances within a schedule will be applied to levies within the same schedule only (for past and future dated levies).
2. Select here if you want fund to be able to overdraw individual building funds. For example, when you are processing supplier payments and your administration fund has no funds but your sinking/reserve/capital works fund does, the payment will still be allowed. This *will not* allow the actual bank account balance to be overdrawn.
3. Select here if you want to truncate data when exporting to CSV, where any fields exceed 32,000 characters. This will avoid any unexpected formatting issues within the file.
4. *Redundant field* - This is a historical field related to the amount Australia Post charged for handling payments made at an Australia Post outlet. This fee is now redundant as it's no longer charged (as at late 2022).
5. This is the GST rate that will be applied to transactions for your GST registered buildings.
6. Select here if you want to see schedule details for each lot in a new column on the *File>Lots* screen.
7. The default income tax rate can be entered here for buildings that are ticked to be included in income tax return reports. When you generate tax return reports, the tax payable will be generated as taxable income x percentage entered here.
8. Select Lock *Financials once final Reports are run* if you want to prevent any financial transactions being made for the financial year that was reported on, once final reports have been run for a building.
9. Select here to lock transactions in a prior BAS period. If this is selected, editing of transactions that took place in a prior BAS period will be restricted.
10. Select here to make double-sided printing more manageable for certain printing jobs that are **manually handled**.
    a. When the setting is enabled, the system will apply padding/breaks within the PDF file used for manual printing between each recipient's notice. This will ensure that the last page of one notice isn't printed on the first page of the next notice. When the setting is disabled, the system will behave as it currently does. This does not impact delivery via BING and email.
    b. Setting applies to printing jobs for: Due/Fee Notices, Special Notices, Utility Notices, Arrears/Final/Legal Notices, Meeting Notices and Minutes, Mail merge letters (Lots & Committee), Utility debtor invoices, and Debtor statements.
11. Select here if you want PropertyIQ to generate notices when you conduct a due notice run, if the balance owing is zero.
12. Select here if you only want the totals owing on a reminder notice to appear on the last page.
13. Select here to restrict arrears notices to a single page. If a lot owner has multiple arrears they will be summarised.

14. Select here to restrict final notices to a single page. If a lot owner has a multiple arrears they will be summarised.
15. Select here to restrict legal notices to a single page. If a lot owner has multiple arrears they will be summarised.
16. If *Charge Strike back levies by default* is selected, the box "Strike Chargeback Levies for Arrears/Final/Legal Notices" will be ticked by default on the Due Notices screen.
17. If this is ticked, when you receive funds on a .txn file that need to be allocated, then the GST setting that you have allocated for that chart of accounts code will default. For example, if you had a chart of accounts code for bank fees that is ticked as GST free, then when you allocate funds to that code, the item will be GST free by default.
18. If your management fees are increased by the CPI percentage you can globally increase management fees here. Management fees are set up in the building card charges tab. This should be done with caution as it will increase management fees for all Buildings by the percentage entered. (See *Increase Management Fees* below)
19. Select here if you want to consolidate GST chart of acccounts codes on the balance sheet report into one account. You can create an applicable name for this account.
20. Select here to consolidate/group all variable and activity charges created by the Fee Schedule run into one generic line item per invoice for certain Financial Reports (Income and Other Expenses, Funds Management and Cash Management).
21. Enter a default chart of accounts code for Company PAYG. When processing BAS, PropertyIQ will allocate Company PAYG payments to this account. This account will also be used to report 'Tax Paid' when generating an Income Tax Return report in PropertyIQ.
22. Enter a default chart of accounts code for Wages PAYG. When processing BAS, PropertyIQ will allocate Company PAYG payments to this account.
23. Select here to include the bank account number details on balance sheets.
24. Select here to include your company details as a header on program generated documents.
25. Select here if you want to show the opening and closing balances on Income and Expenditure reports.
26. Select here if you want to show the building's financial year start date as the *From* date (instead of opening balance date) when generating an Income and Expenditure Report during a building's first financial year in PIQ.
27. Select here to determine whether income and expenditure reports are ordered by account name or account code order.

INCREASE MANAGEMENT FEES

1. Select the *Increase Management Fees* button.
2. Type the percentage amount you want to increase fees by
3. Update

SUPPLIER TRANSACTION DEFAULTS

1. Select here to set the default status for Supplier Transaction invoices on the Supplier Payments screen to **Hold** here. Invoices won't be paid while they are set to *Hold* status.
2. Select here to set the default status for Supplier transaction on the *Supplier Transactions* screen as **Approval** (needing internal approval) Invoices won't be paid while they have *Approval* status.
3. To set the default status for Supplier Transaction Invoices on the Supplier Transactions screen as **External Approval** (needing approval from the building's committee/council) click here. Invoices won't be paid while they have *External Approval* status.

DEBT COLLECTION SETTINGS

GENERAL

These settings are relevant to the Debt Collection V2 feature that must be enabled by PropertyIQ.

- To learn more about this feature and how to enable it, visit Debt Collection V2 resources page on our website.
- For more detailed instructions, see our Debt Collection V2 help manual.

PAYMENT PLAN STATEMENT

1. Payment plan statement. This is the statement that will appear on arrears, final and legal notices if the building has the box "Payment Plan" ticked on its building card and you have added the merge field {{&Payment_Plan_Statement}} to the standard merge templates for arrears, final and legal notices.

1. Choose whether you want to round levy instalments to the nearest 0.05c or the nearest $1.00
2. Select to disallow any rounding on budgets
3. Select your preference for budget calculation
   a. Expenditure only – the budget will be calculated based only on the expenses you enter (you can still enter income items – they just won't be taken into account when calculating the budget)
   b. Expenditure less income – the budget will be calculated based on any expenses you enter less any income you enter.
   c. Levy income only. The budget calculation is based only on the amount you enter as income using the default levy income chart of accounts code. (You can still enter expense items – they just won't be taken into account when calculating the budget)
4. There are two layout options for printing budgets. You can hover your mouse over the question mark to see full details about each layout
   a. Layout 1 prints in Landscape style
   b. Layout 2 prints in Portrait style
5. There are two layout options for owner and contribution summary pages. You can hover your mouse over the question mark to see full details about each layout.
   a. Layout 1 shows a line for each lot
   b. Layout 2 allows you to group lots with the same UOE together to reduce the overall size of the report.

PROPOSED BUDGET LAYOUT 1

PROPOSED BUDGET LAYOUT 2

PropertyIQ

The allocation rules determine how funds are allocated when you process a TXN file and run the Bulk Credit Transfer function.

1. This rule ensures that transactions that have been processed via the direct debit process will be recognised when the show on the .txn file.
2. This rule ensures that owners are allocated a credit if they pay more than all levies that are due. This rule cannot be unchecked.
3. Select here to allocate owner payments to future special levies if the amount they are paying matches a future special levy.
4. Select here to allocate owner payments to the oldest unpaid group of levies if the amount they are paying matches the group of levies. This rule fosters payment of the oldest owner debts first.
5. Select here to allocate owner payments to standard levies first and then allocate back to special levies, the oldest first. This rule fosters payment of standard levies first.
6. Select here to allocate levies in due date order, part paying if necessary. This will allocate all owner payments to the oldest due levies and ensure that they are paid first.
7. Autofill order. Click on the circle dial to choose between allocating owner funds received against interest first and then principal or principal first and then interest.
8. Select here to tick to apply discounts globally if levies are paid early.

NOTE The percentage amount of discount, and time period to apply it are all set individually for each Building in the *Building Card>Settings Tab>Levy Discount accordion*.

Document types are used in PropertyIQ to categorise and store files and documents.

There is a default list of document types, however you can edit and create additional types as required.
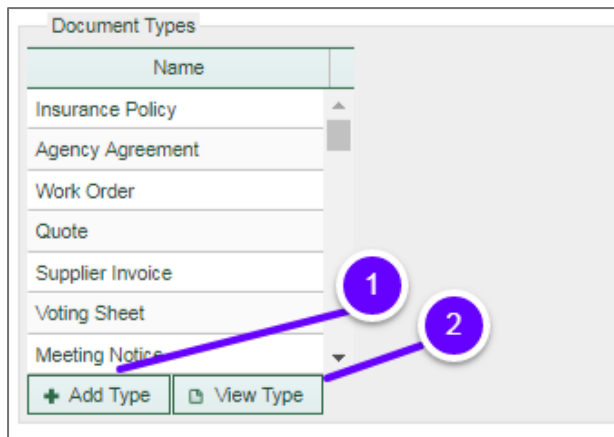
1. This area shows the types of documents that are available for your company. Click here to add a new type of document.   See below for a list of default document types you should never alter.
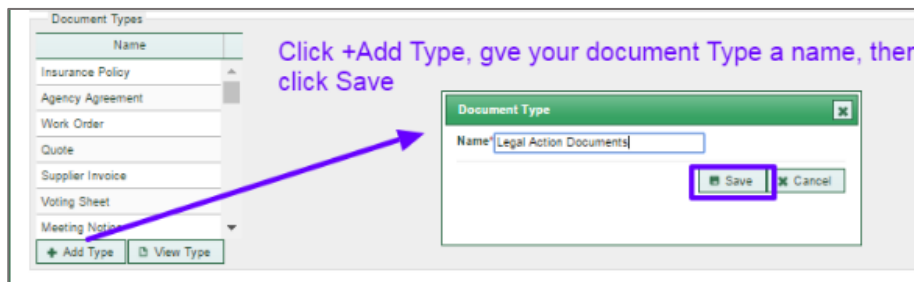
2. Click here to view a document type and edit its name.
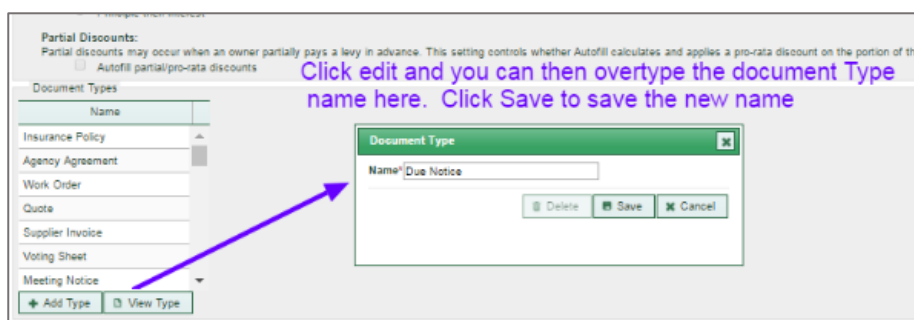
DEFAULT DOCUMENT TYPES YOU SHOULD NOT ALTER

The following system default document types ***should never*** be altered as they draw information from other areas in PropertyIQ.

These document types cannot be deleted.

- Work Order
- Quote
- Supplier Invoice
- Meeting Notice
- Meeting Minutes
- Levy Notice
- Due Notice
- Arrears Notice
- Final Notice
- Legal Notice
- Correspondence
- Insurance
- Financial
- Annual Notice
- Published Document
- BAS Report
- Budget Report
- Remittance Advice File
- Tender Request
- Electricity Utility Notice
- Gas Utility Notice
- Water Utility Notice
- Income Tax Report
- Bas Clearing Journal Summary
- Work Order Attachment
- Work Order Email Attachment
- Quote Request
- Quote Attachment
- Quote Email Attachment
- Other Utility Notice
- Cash Book Reports & Statements
- Cash Book Month End
- Change of Owner

INCOMING EMAIL TYPES

This setting is relevant to the **Incoming Email** feature that must be enabled by PropertyIQ.

For more details, see Incoming Email Settings and Incoming Email Types sections in this manual.

1. Any existing incoming email types show here
2. Select *+Add Type* to add a new incoming email type
3. Select *View Type* to view/edit an existing email type you have highlighted
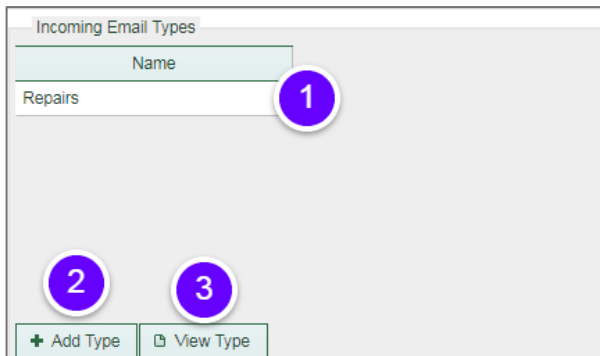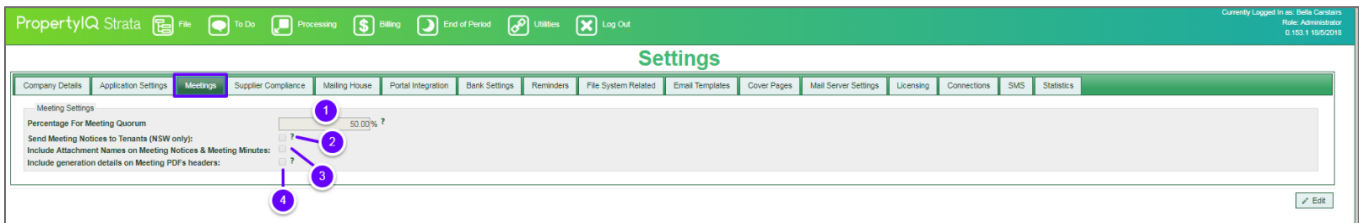
Settings that affect meetings are located on this tab.

Select the [✏ Edit] button to edit your meeting settings.

1. This is the default percentage of lot owners in attendance at a meeting that is required for a quorum. When you create a new meeting, the percentage entered here will default, but you can override for an individual meeting from the meeting card.
2. If this is ticked, when generating meeting notices for a NSW building, it will also generate extra notices to any formal tenants who are not already selected as the recipient for meeting notices.
3. If this is ticked, the names of any documents that you attach to a meeting notice, will show at the bottom of each page of the attachment.
4. If this is ticked the time of generation and the user that generated any documents that you attach to a meeting notice, will show at the top of each page of the attachment.

The Compliance tab determines all the functions that affect **supplier compliance** and the **building compliance register**.
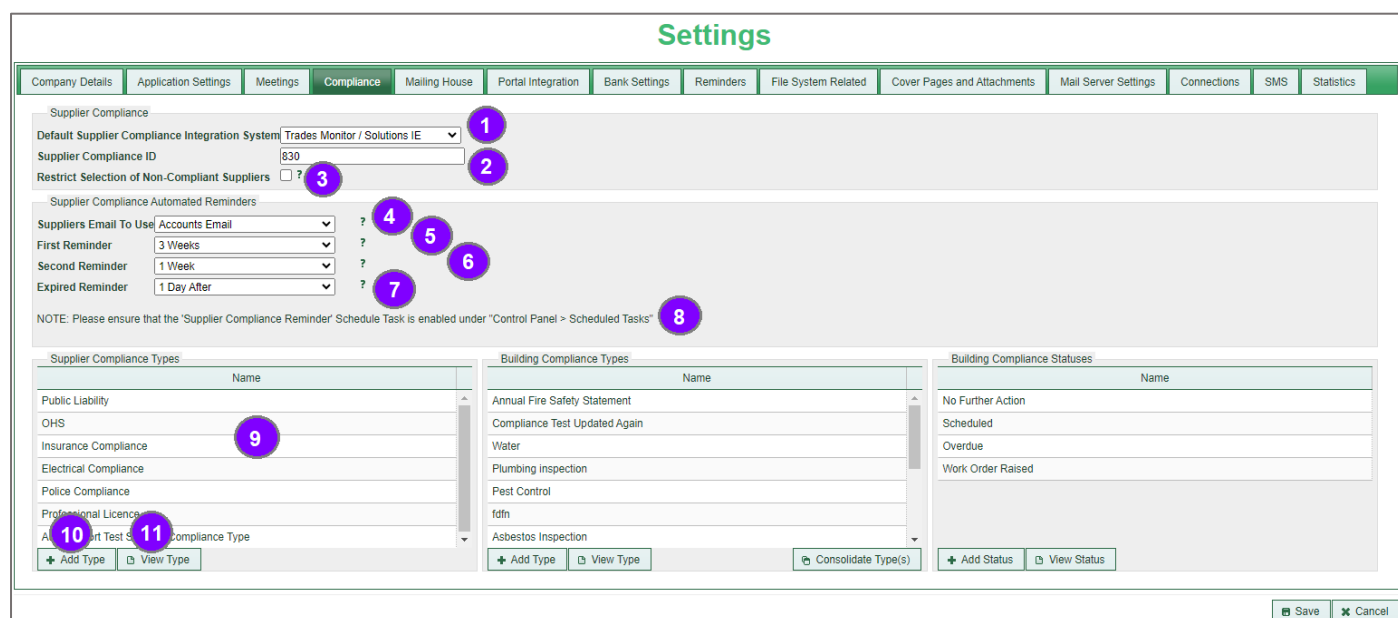
Supplier compliance
- You can select whether you use an external provider to monitor and update your supplier compliance or whether you maintain compliance records manually.
- Choosing an external provider allows you to upload data from the *Supplier* screen in .CSV format to send to the provider and import the updated compliance data they provide to you. You will need to have an account with the provider.

Building compliance
- You can setup and manage your default list of building compliance types and statuses.
- These will form your default list to choose from when adding or editing items in the building compliance register in *Building card>Registers tab>Compliance Register accordion*.
- Ensures consistency and uniformity in what's selected by users and what's shown in reports.

SUPPLIER COMPLIANCE

Select the [Edit] button to edit your compliance settings.

1. Select whether you want to update supplier compliance manually or select Trades Monitor from the dropdown list.
2. If you are using Trades Monitor, enter your account ID here. This is provided by Trades Monitor.
3. If you tick this box, non-compliant suppliers will not be selectable for work orders, quote requests or invoices
4. If you want to send automated supplier compliance emails, select which of the email addresses entered on the supplier card you want to send the reminders to
5. Select the time period prior to the supplier's compliance expiring that you want the first automatic email reminder to send.
6. Select the time period prior to the supplier's compliance expiring that you want the second automatic email reminder to send.
7. Select the date you want the "compliance expired" email to send

   [NOTE] If you want to send automated supplier compliance emails, you need to create the appropriate email templates from the *File>Templates>Standard Email Templates* tab. For full details, see the manual "Templates". The names of existing compliance types appear in this list.

8. If you want to send automated supplier compliance emails you need to enable the scheduled task "Supplier Reminder" from the *Control Panel > Scheduled tasks*. For full details, see the manual "Control Panel".

9. The existing supplier compliance types show in this list
10. Use *+Add Type* button to add a new compliance type
11. Select *View Type* button to view an existing compliance type

ADDING A NEW SUPPLIER COMPLIANCE TYPE

1. Select *Add Type*
2. Enter a name for the new supplier compliance type
3. *Save*

BUILDING COMPLIANCE

1. The existing building compliance types show in this list. It will be empty by default for a new client.
2. Use *+Add Type* button to add a new building compliance type.
3. Select *View Type* button to view an existing building compliance type.
4. Select *Consolidate Types* button to merge two or more types together, allowing you to clean up and delete redundant types.
5. The existing building compliance statuses show in this list. It will be empty by default for a new client.
6. Use *+Add Status* button to add a new building compliance type.
7. Select *View Status* button to view an existing building compliance status.

ADDING A NEW BUILDING COMPLIANCE TYPE

1. Select *Add Type*
2. Enter a name for the new building compliance type
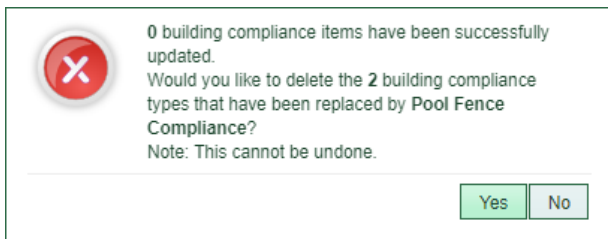3. *Save*

CONSOLIDATE BUILDING COMPLIANCE TYPES

1. Click *Consolidate Types.*
2. Click *Select Target Compliance Type* to choose **one** target type from the list – this will replace the type/s you select in Step 7.
3. Find and select the type.
4. The number of register items linked to this type will show here.
5. Click *Select*.
6. The selected target type will be shown here.
7. Click *Select Compliance Types to be Replaced* to choose one or more types from the list.
8. The selected types that will be replaced will be shown here.
9. Click *Complete*

10. Click *Yes* to confirm.

0 building compliance items have been successfully updated.
Would you like to delete the **2** building compliance types that have been replaced by **Pool Fence Compliance**?
Note: This cannot be undone.

Yes | No

11. You also have the option to delete the old types you've replaced. Click *Yes* to delete, or *No* to keep them.
You can still delete a type from the list at any time by viewing them and using the delete button.

NOTE You can only delete a type that is **not** linked to any compliance register items in your PropertyIQ.

ADDING A NEW BUILDING COMPLIANCE STATUS
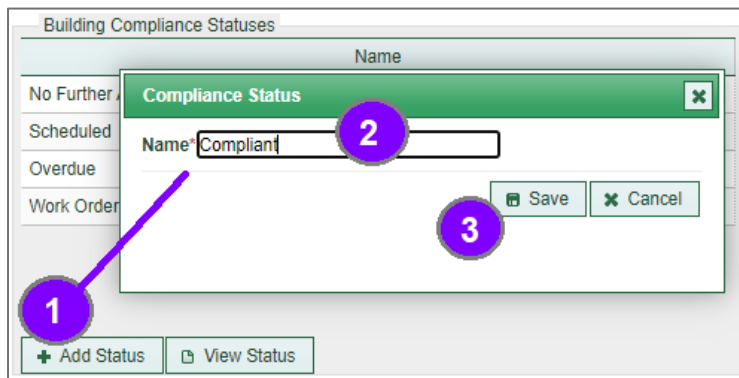
1. Select *Add Status*
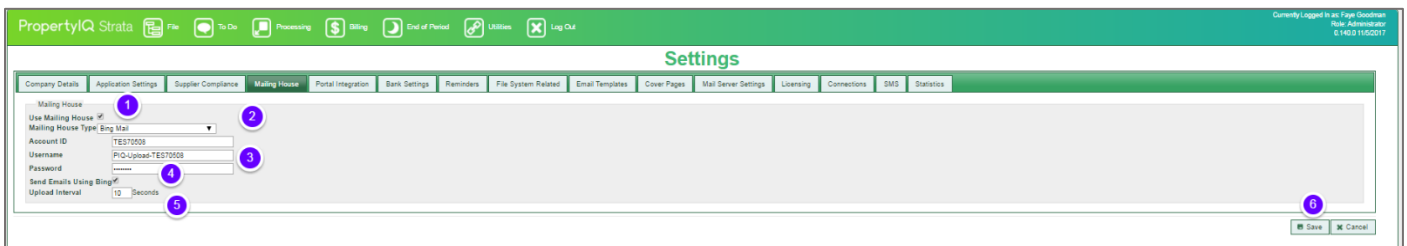2. Enter a name for the new building compliance status
3. *Save*

MAILING HOUSE

You can elect to have your documents sent to Bing mailing house for processing (Currently [Bing](#) is the only mailing house that integrates with PropertyIQ)

If Mailing House is selected, any documents you generate that are set to *Post* are sent to the mailing house for printing, enveloping and posting. You can also elect to have your emails sent by a Bing. You will need to set up your own account with Bing.

Select the [✎ Edit] button to enable editing

1. Select here to enable using a Mailing House
2. Choose *Bing* from the dropdown list
3. Enter the account ID and username provided by Bing
4. Select here if you also want Bing to send emails
5. Select the upload interval here
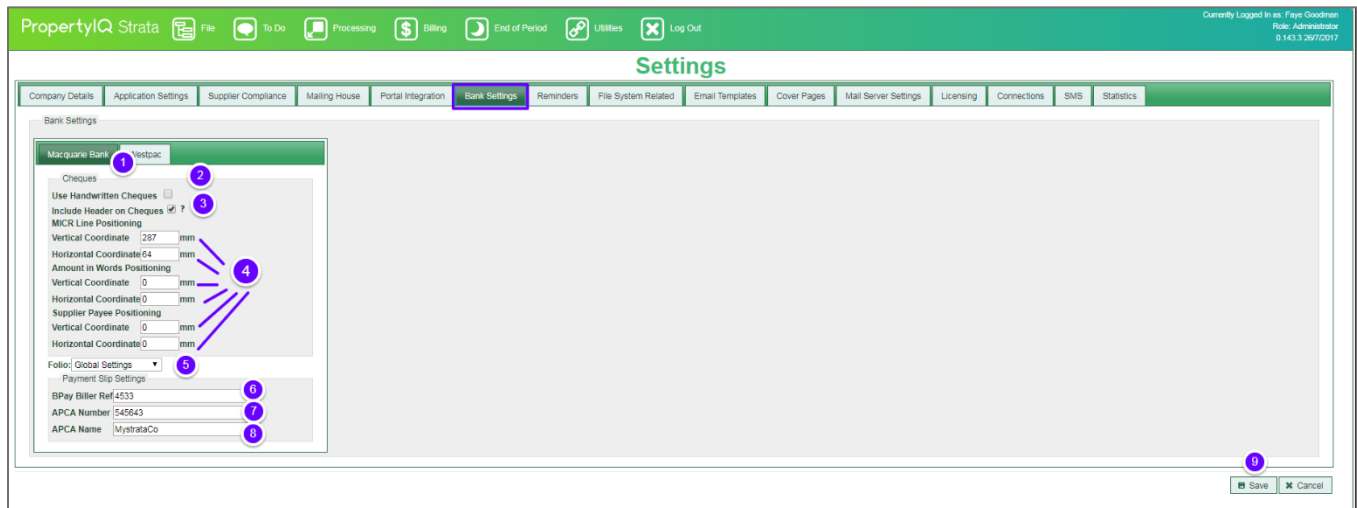6. *Save*

PORTAL INTEGRATION (PORTAL V1)

These settings were for users of Portal V1 – a third party integration with CoreLogic.

These settings are now **redundant** and are no longer relevant (since 2021). **Do not use.**

BANK SETTINGS

The bank settings tab records the settings from your bank.

Select the [Edit] button to start editing your bank settings.

1. Macquarie bank should be selected
2. Select here if you are using handwritten cheques. If this is not ticked, PropertyIQ will produce printed cheques
3. If you have selected *Include Co. Details on Header* in your Applications Settings, you can tick or untick here to alter whether header details show on cheques
4. These are the positioning details on your cheque stationery. You can physically measure one of your printed cheques and then enter the co-ordinates here.
5. If you are using folios, and your folios have a different BPay and APCA credentials, you can enter separate details for each folio. Note: to utilise this function, your Building Manager's role will need to have Folio specific data enabled. For full details, see the Manual "Users, Roles and Permissions"
6. If you are a BPAY Biller, your BPAY Biller reference is entered here. This is supplied to your bank by BPAY and they will supply it to you.
7. Your six-digit APCA ID number is entered here. This is supplied by your bank.
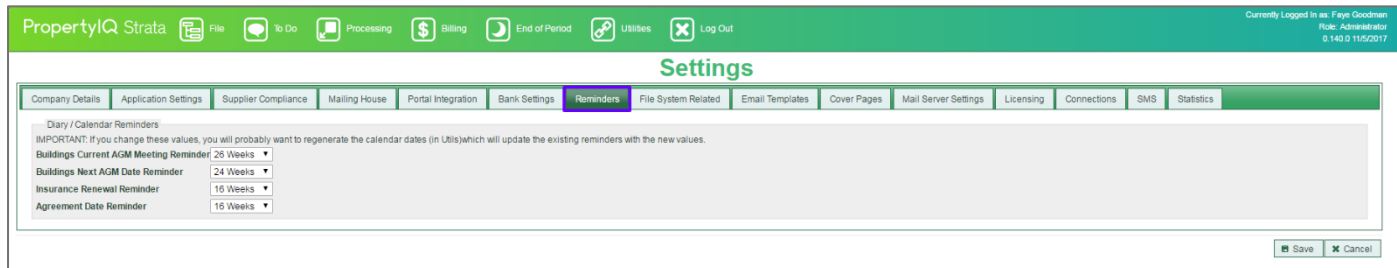8. Your APCA ID name is entered here
9. *Save*

REMINDERS

The reminders settings area is where you set the timeframe for advance reminders in your diary for specified events.

Select the [✏ Edit] button to edit the reminder settings, then select the length of time you want advance reminders to trigger, from the dropdown list.

NOTE If you alter the reminder periods you should email support@propertyiq.com.au and ask for the calendar to be regenerated so that any existing reminders can be updated.

FILE SYSTEM RELATED

These settings were used for locally hosted PropertyIQ clients. All PropertyIQ clients are now hosted in the cloud using Amazon Web Services (AWS), with automated backups and monitoring. The use of drop folders on local servers is not available in PIQ cloud hosted environments.

These settings are now **redundant** and are no longer relevant. **Do not use.**

COVER PAGES & ATTACHMENTS

This tab is where you can:

1. View and select **cover pages** (using a custom merge template)
2. View and select **attachments** (using a saved PDF document in PropertyIQ)

Here you can nominate cover pages and attachments at the Global or Folio level as required. These will then be included when issuing the relevant notices.

TIPS:

- You can also nominate cover pages and attachments at a Building level under *File > Buildings > select building > Documents tab.*
- You can only use 1 cover page at any time. The cover page at the building level will override any set at the Global or Folio level. If none is set at the building level, it will use Folio. If there is none for Folio, it will use Global.
- You can configure and use **both** an attachment at the building level AND an attachment at the folio or global level.
- When using cover pages and attachments, the <u>print order</u> will be:
    - o Cover page – building or global/folio
    - o Notice/Report
    - o Attachments – building
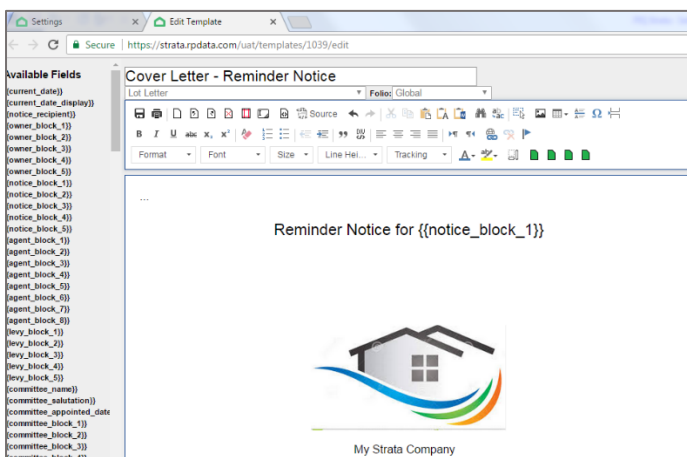   - o Attachments – global or folio
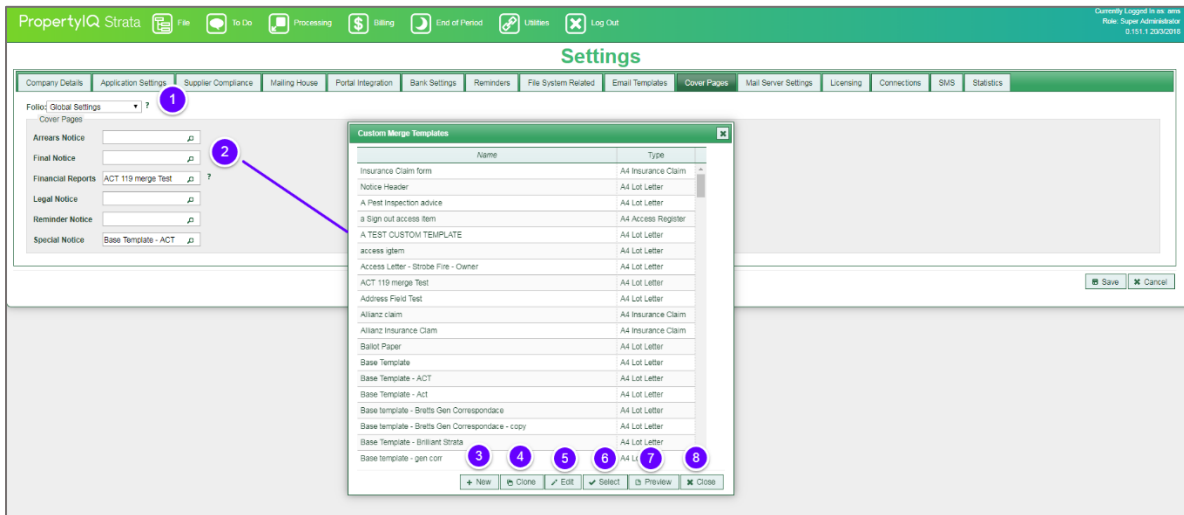
COVER PAGES

1. The cover pages area defaults to global settings, but if you are using Folios, you can click on the dropdown list to attach different cover sheets for each Folio
2. Use the search icon to search for a custom merge document template to attach. This will open the templates box.
3. Use the New button to create a new custom merge document
4. Click on at template to highlight it and click on the clone button to clone an existing document
5. Click on a template to highlight it and click on the Edit button to edit an existing document
6. Click on a template to highlight it and click on the Select button to select an existing document
7. Click on a template to highlight it and select *Preview* to open a preview
8. *Close* to exit templates

The template editor will open the selected document in a new tab. You can then edit the template. For full details about editing templates, see the manual "Templates"

ATTACHMENTS

1. The attachments area defaults to global settings, but if you are using Folios, you can click on the dropdown list to attach different attachments for each Folio.
2. Select the search icon for the notice type you want the attachment applied to
3. If the document is already saved in PIQ, search and select it from the list
4. If the document is not yet saved into PIQ, upload and save the document from your local computer using the *+Document Entry* button
5. Once the document is selected, click the *Select* button

1. The selected attachment will appear here
2. Select *Save* to save the changes and apply the attachment
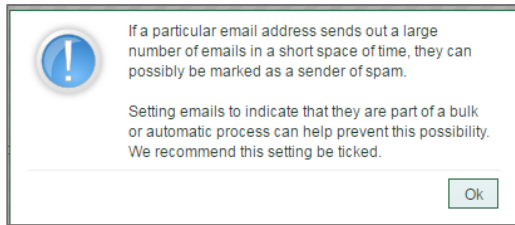
MAIL SERVER SETTINGS

There are two tabs in the mail server settings area – *Incoming* and *Outgoing*.
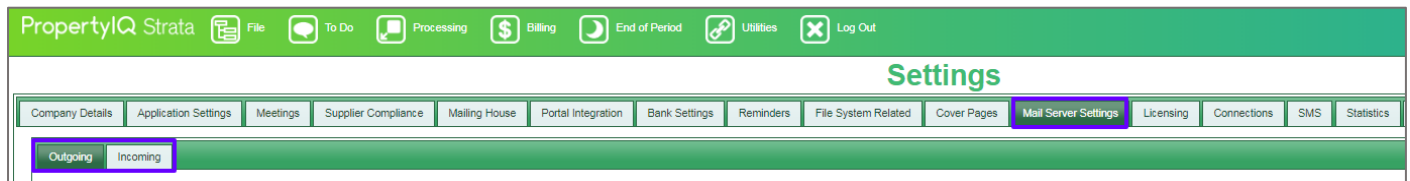
OUTGOING EMAILS

The outgoing emails settings allow you to configure PropertyIQ to send emails to lot owners, suppliers, committee members and others directly from PropertyIQ. You can usually find your mail server settings from the settings area of your email account.

1. Select the Outgoing tab from the Mail Server settings page.
2. 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
3. Select your mail server type. The choices are
    a. Office 365
    b. Outlook
    c. Google (gmail)
    d. Other (if you select Other, you will need to enter all other details manually)
4. Once you've selected your mail server type your outgoing mail server URL shows here
5. Once you've selected your mail server type your port number shows here
6. Once you've selected your mail server type authentication method shows here
7. Once you've selected your mail server type, your authentication protocol shows here
8. Enter your email account username shows here your company the email address)
9. Your email account password is entered here
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. this will show for your recipients if your mail server allows it.
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:

If a particular email address sends out a large number of emails in a short space of time, they can possibly be marked as a sender of spam.

Setting emails to indicate that they are part of a bulk or automatic process can help prevent this possibility. We recommend this setting be ticked.

Ok

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. *Save*.

Once you have saved your settings you can click *send test email* to trigger a test email.

NOTE   If you change these settings and save, the *Test mail server settings* field becomes available. You can enter an email address here, select *Send Test Email* and will receive an email confirming your emails are working

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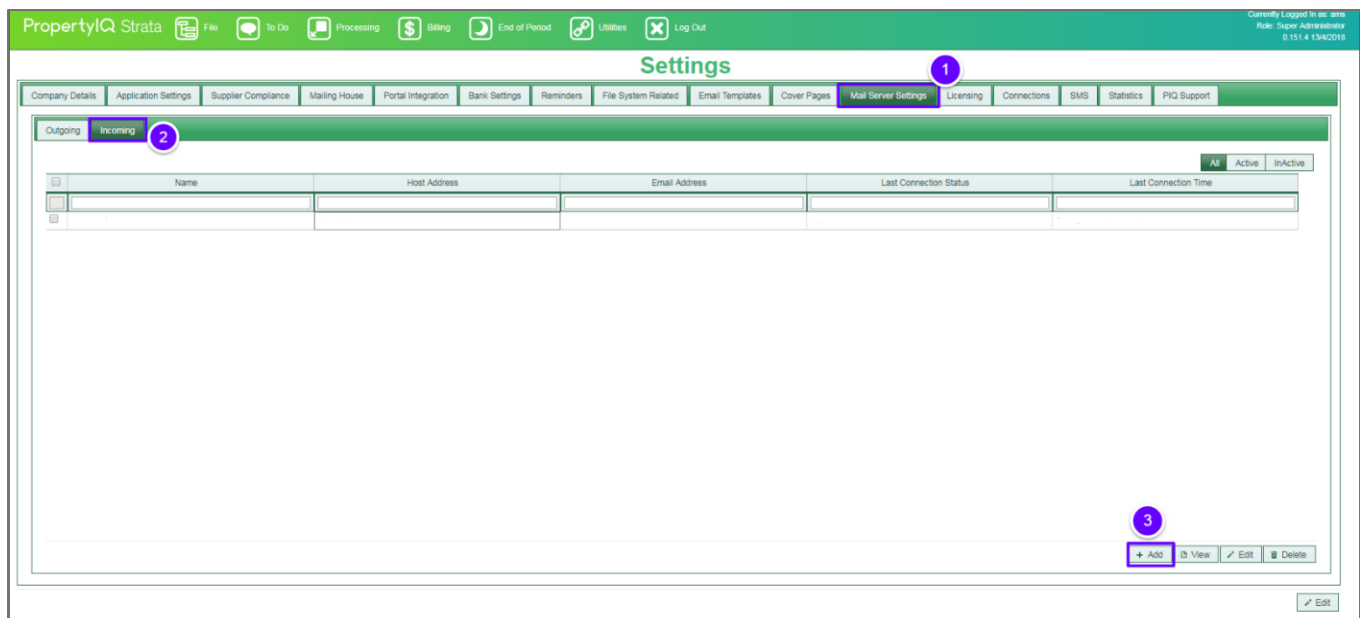
Once the address had been created you will need to know the following details to proceed with setting up incoming emails:

- 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 ![Utilities] 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.
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.

PropertyIQ

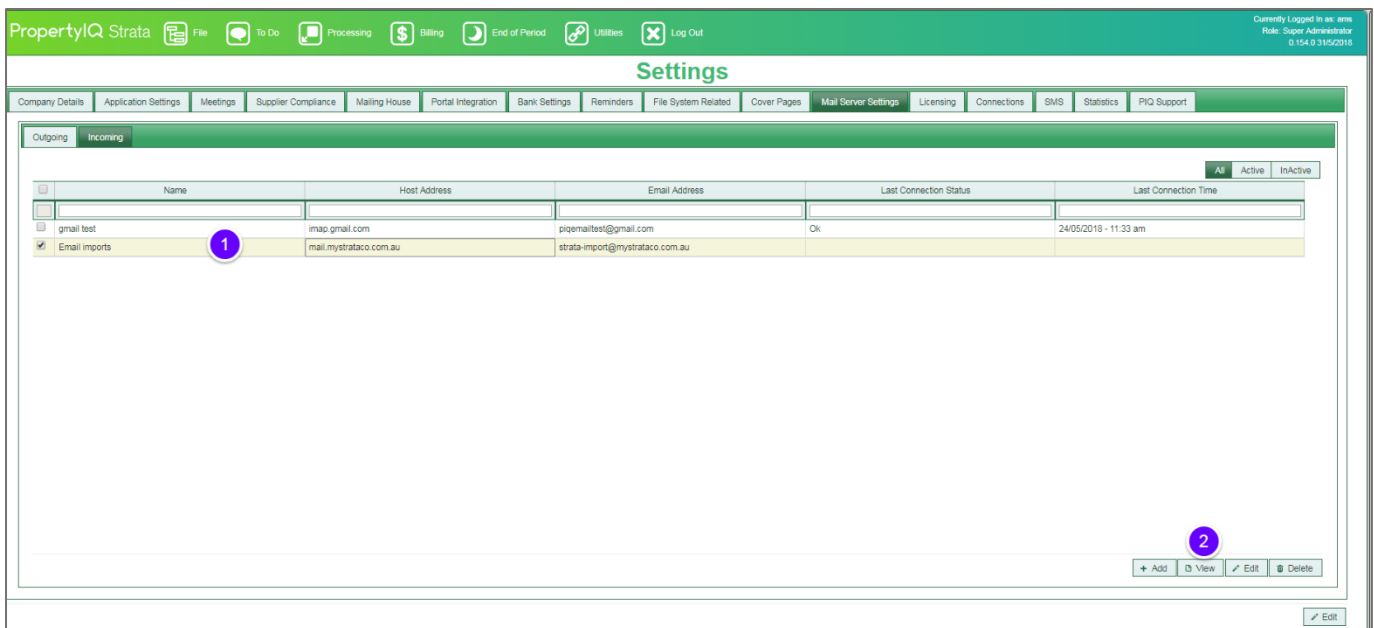If your credentials are valid you will see this message:
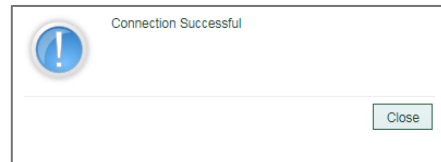
If your credentials are invalid the pop-up will show you what the problem is:

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

VIEWING AND EDITING AN EXISTING INCOMING EMAIL BOX

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

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 setting above).

[✏ Test Connection] [🗑 Delete] [‖ Activate] [🖫 Save] [✖ Cancel]

1. Enter any changes you want to make
2. *Test connection* to test the new settings
3. *Save* when you are ready

You can allocate types to your Incoming emails to help categorise them (similar to document types but for emails).

Go to Application Settings > Incoming email types.

1. Your existing incoming email types show in this list. It will be empty by default for a new client.
2. Use *+Add Type* button to add a new incoming email type.
   a. Enter a name for the type. Optionally assign a document type for the storage of email attachments, and optionally select whether you want email attachments to automatically save to this document type when you allocate the incoming email.
3. Select *View Type* button to view an existing incoming email type.

1. These are your *Macquarie Direct Uploads* credentials. These are provided by your Macquarie Bank relationship manager.

2. These are your Macquarie Direct Downloads credentials. These are provided by your Macquarie Bank relationship manager

3. These are your Macquarie Direct Debit Authority credentials. These are provided by your Macquarie Bank Relationship Manager.

4. Invoice Express is no longer available and has been replaced by Automated Invoice Management (AIM) If you would like more information about AIM, email support@propertyiq.com.au

5. Macquarie Outbound Communications is no longer available

6. These are your ABN lookup service credentials. This is usually enabled by your implementation team as part of your account configuration. You can enable ABN Lookup yourself by registering with the Department of Industry Innovation and Science's ABN lookup service. Click here for more information about the ABN Lookup Service Once this is enabled, when you enter an ABN on a Supplier's card PropertyIQ will check the ABN lookup service and advise whether you have entered a valid ABN. If the ABN is valid, PropertyIQ will also tick the supplier as being GST registered.
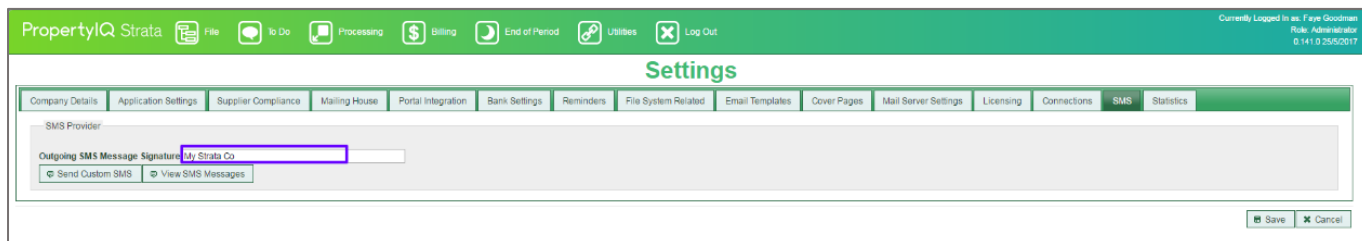
SMS

If you have SMS enabled, you can test your SMS is working and review your SMS history from the SMS Tab.
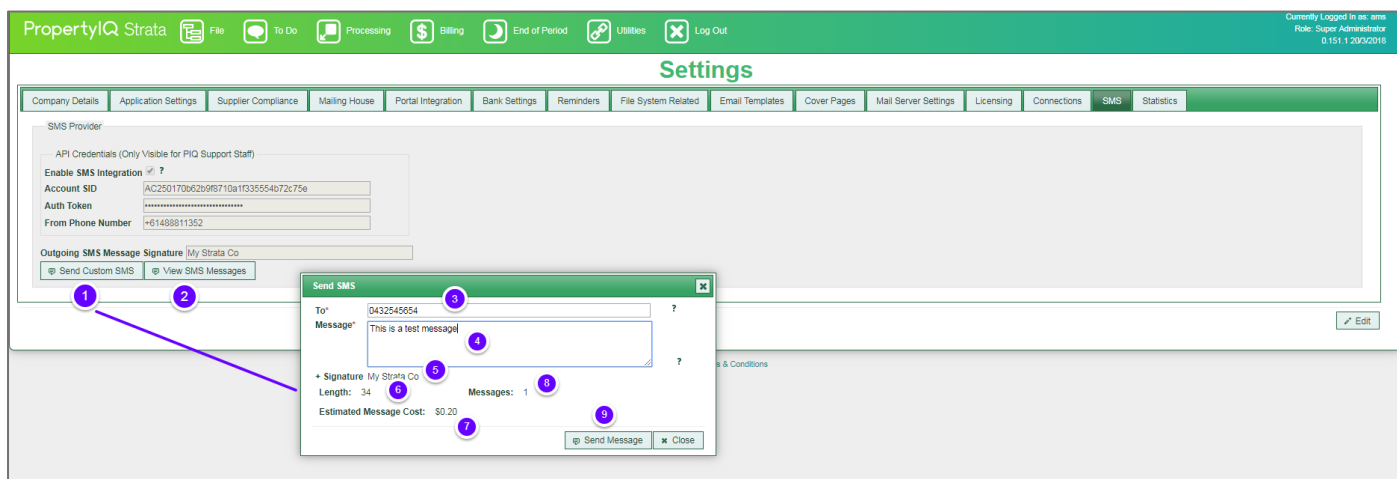
SMS SIGNATURE

To edit your outgoing SMS signature, select the Edit button and enter the signature you want here.
This will show on all SMS messages sent from your company.

SEND CUSTOM SMS (TEST)

You can test your SMS by sending a Custom SMS message to yourself.

1. Select *Custom SMS*
2. Select *View Text Messages* to view a log of SMS messages (see below)
3. Enter your own mobile number
4. Enter the text you want to send
5. The standard signature shows here
6. The number of characters in the message shows here. There's no limit on the number of characters but once the message is more than 160 characters you will be charged for a second message.
7. The total cost of the message shows here
8. The number of messages you will be charged for shows here.
9. *Send Message*

You should receive an SMS to the mobile number you entered.

To view your SMS history, click on the *View SMS Messages* button.

1. Select the date range by clicking in the date fields to enable the calendar
2. The view defaults to *Sent* but you can toggle your view to see *All*, *Sent* or *Error* SMS
3. To refine your search, enter some key letters in any of the empty boxes on the top line
4. The details of each SMS show here.

STATISTICS

The statistics tab shows your current position. The statistics from this tab are emailed to the accounts department at PropertyIQ each month by the scheduled task "Lot Count Emailer".

1. The default view is all folios, but if you use folios, you can select to view individual folios from the dropdown list
2. Your statistics show here