

PropertyIQ™

Supplier screen

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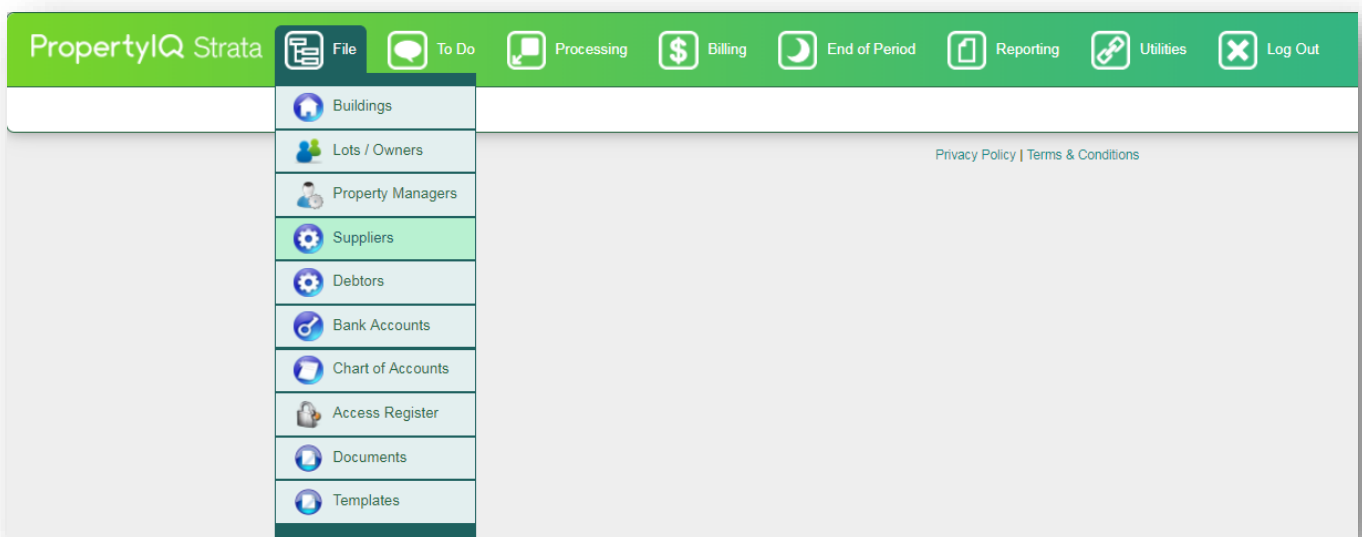
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INTRODUCTION TO THE SUPPLIER SCREEN

The supplier screen shows the information relating to supplier records and allows you to perform tasks in bulk, such as updating compliance details from external providers, emailing, creating mailing labels and exporting.

GETTING STARTED

To get started go to  and click on Suppliers



1. Click in the boxes on the left column to select a supplier (or click in the top row to select All)
2. Type some key letters in any of the empty boxes to refine your search and find the supplier you want
3. The supplier name shows in this column. You can click on any column heading to sort the screen in order of that heading
4. When you create a supplier, you can create a code for them. This is a handy reference to search by. For full details, see the Manual "Supplier Card"
5. The balance column shows the total of processed but unpaid invoices that are currently owing to that supplier. For detailed information about paying supplier invoices, see the manual "Supplier Transactions".
6. You can allocate a type that indicates the type of work they do. This is a handy reference when creating work orders. For full details on work orders, see the manual "Work Orders"
7. The supplier's suburb shows in this column
8. The supplier's main phone number shows here
9. The supplier's mobile phone number shows here
10. The supplier's ABN shows here
11. The supplier's compliance status shows here. Two ticks indicates that both their Public Liability and OHS are current. A cross and a tick indicates that one of the two is invalid, two crosses indicate that both are invalid. Two question marks indicate that no compliance details have been entered for this Supplier. For details about entering compliance information, see the manual "Supplier Card".
12. The screen will default to show Active suppliers but you can toggle to show All, Active or just Inactive suppliers
13. If you are using an external provider to maintain your compliance records, for example Trades Monitor, click the Compliance button to either export data for submission or to import updated data from the provider. See section below on Compliance
14. Click on the Email button to send a general bulk email to any Suppliers that are selected on the screen. See section below on Emailing suppliers
15. Click on the Export button to export the details of any Suppliers that are selected on the screen. See section below on Export. **Do not** use this button to export to Trades monitor
16. Click on the *Add Mailing Labels* button to create mailing labels for any suppliers that are selected on the screen. For detailed information about mailing labels, see the manual "Mailing Labels"
17. Click on the *+ Add* button to add a new supplier. For full details on adding a supplier, see the manual "Supplier Card"
18. Click on the *View* button to view the supplier card for a supplier that is selected on the screen.

PropertyIQ Strata File Tools Processing Billing End of Period Utilities Log Out Currently Logged In as: Faye Goodman Role: Administrator 1/13/2020 20:01

Suppliers

Supplier Name	Supplier Code	Balance	Type	Suburb	Phone	Mobile	ABN	Compliance
1800-Got-Junk?	1800-GOT-JUNK?	\$620.00	Agent	DARLING	03 9598 5657	0414 303 968	9856324	✓✓
Adam Plumber		\$352.00	Plumber, Removalist, Electricians, Owner	PARRAMATTA		0424515115	9856324	✓✓
Bob The Builder	BOB	\$0.00		SMILETOWN		0434 369 841	21434654656	✓✓
Boris Venn Handyman Services	VENN	\$0.00	Handyman	EPPING		0413434 345	4325446543	✓✓
Brett Earle		\$600.00	Agent	MELBOURNE		0424515115		✓✓
DARRYL JOHN HAMMOND		\$750.00	Plumber, Gardening				19354173582	✓✓
Dean Scarce Electrical P/L	DEANSELEC	\$18,401.86	Electricians, Gardening, Plumber, Handyman, Removalist		03 9856 5264	+61414392000	85975685212	✓✓
Folio Supplier 100	111	\$4,569.91	Handyman				67888889	?
Glens Doors		\$0.00		SMITHTOWN			4645464848792	?
Glens Plumbing		\$0.00	Plumber	SYDNEY				✓
Gym Equipment Australia		\$0.00		ST KILDA			234543333	?
Henry The Man	35555	\$0.00	Handyman	SYDNEY	0288765678	0412654655	1238766	✓✓
Hornaby Garden Maintenance	HORNS	\$0.00	Gardening	WAHROONGA		0412 345 345	21434434545	✓✓
Jack of All Trades	JACK	\$600.00				0423945443		✓✓
Joe's Plumbing	22345	\$0.00		REDSTONE	0398767837	0402799887		✗✗
John Electrical		\$0.00	Electricians				8521446	✗
JOHN RAYMOND SCHMIDT		\$0.00	Window Cleaner				90180473311	?
John the water man		\$0.00						?

1 selected

Compliance
Email
Export
Add Mailing Labels
+ Add
View

COMPLIANCE BUTTON

The Compliance button is used to send your supplier details and receive updated information from an external compliance monitoring service provider, such as Trades Monitor.



If you are using an external compliance provider, the provider needs to be selected in the settings>supplier compliance function. By default, only administrators have access to the settings function but your company may have altered permissions.

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File To Do Processing Billing End of Period Utilities Log Out

Settings

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

Supplier Compliance

Default Supplier Compliance Integration System: Trades Monitor / Solutions IE

Supplier Compliance ID: 625

Save Cancel

1. Type some key letters in the empty boxes on the top row to refine your search and find the suppliers you want
2. Tick the box on the top left to select all (or you can click on the supplier's individually if you don't want to send data for them all)
3. Click on the *Compliance* button at the bottom of the screen

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File To Do Processing Billing End of Period Utilities Log Out

Suppliers

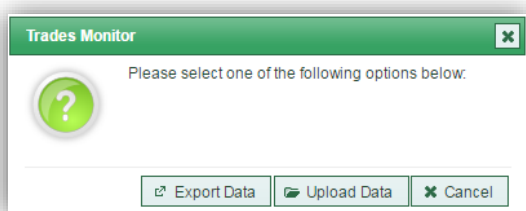
Supplier Name Supplier Code Balance Type Suburb Phone Mobile ABN Compliance

1800-GOT-JUNK?	1800-GOT-JUNK?	\$620.00	Agent	DARLING	03 9598 5857	0414 303 988	9856324	✓✓
Adam Plumber		\$352.00	Plumber, Removalist, Electricians, Owner	PARRAMATTA		0424515115	9856324	✓✓
Bob The Builder	BOB	\$0.00		SMILETOWN		0434 369 841	21434654656	✓✓
Boris Venn Handyman Services	VENN	\$0.00	Handyman	EPPIING		0413434 345	43254455543	✓✓
Brett Earle		\$600.00	Agent	MELBOURNE		0424515115		✓✓
DARRYL JOHN HAMMOND		\$750.00	Plumber, Gardening				19354173582	✓✓
Dean Scarce Electrical PIL	DEANSELEC	\$18,401.86	Electricians, Gardening, Plumber, Handyman, Removalist		03 9856 5264	+61414392000	85975685212	✓✓
Folio Supplier 100	111	\$4,569.91	Handyman				67888889	✓✓
Glens Doors		\$0.00		SMITHTOWN			4645464848792	✓✓
Glens Plumbing		\$0.00	Plumber	SYDNEY				✓✓
Gym Equipment Australia		\$0.00		ST KILDA			234543333	✓✓
Henry The Man	35555	\$0.00	Handyman	SYDNEY	0288765678	0412654655	1238766	✓✓
Hornsby Garden Maintenance	HORNS	\$0.00	Gardening	WAHROONGA		0412 345 345	21434434545	✓✓
Jack of All Trades	JACK	\$600.00				0423945443		✓✓
Joe's Plumbing	22345	\$0.00		REDSTONE	0398767837	0402799887		✓✓
John Electrical		\$0.00	Electricians				8521446	✓✓
JOHN RAYMOND SCHMIDT		\$0.00	Window Cleaner				90180473311	✓✓
John the water man		\$0.00						✓✓

37 selected

Compliance Email Export Add Mailing Labels Add View

You will see this screen pop up



The Export Data button creates an Excel spreadsheet in CSV format that you can send to your external provider.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
AGID	SoftVend	SoftReg	SPID	TMID	TMRef	OK	Name	Contact	TID	Title	Address	Suburb	State	PCode	Phone	Mobile	Fax	Email	ABNEntity	ABN	GST	TType	SM2TM	TMComm	LastUpD	Memos		
825	PROPERTY	PropertyI	14959	1E+08	TEST3	Y	TESTER	Nobody	N	Electrician	1 Nobody	SYDNEY	NSW	2000				nadia.tannous@mac	123456	R				First Aid Supplier	28/01/16	Description	[Status]	[Comments]
825	PROPERTY	PropertyI	14960	1E+08	JMAINT	Y	Jonos	Maintenance		Lift Contr						4.25E+08		jono@pixolut.com		R				Supplier Only - Not f	27/01/16	Description	[Status]	[Comments]
825	PROPERTY	PropertyI	Q Strata Te	1E+08			Test													R								
825	PROPERTY	ProerttyI	Q Strata Te	1E+08			JOHN RAYMOND SCHMIDT			Window C										9.02E+10	R							

When you receive the updated information from the provider, save it in a place you will remember. Click on the *Compliance* button again and select the *Upload Data* option. Find the file and upload it. This will update the information in PropertyIQ.

EMAIL BUTTON

You can bulk email suppliers from the supplier's screen.

1. Type some key letters to refine your search and find the suppliers you want
2. Click in the boxes on the left side of the screen to select the suppliers you want (Or click in the box on the top line to Select All)
3. Click on the *Email* button

PropertyIQ Strata

File

To Do

Processing

Billing

End of Period

Utilities

Log Out

Currently Logged In as: Faye Goodman

Role: Administrator

9/13/9 2020/01/7

Suppliers

All

Active

InActive

Supplier Name	Supplier Code	Balance	Type	Suburb	Phone	Mobile	ABN	Compliance
1800-Got-Junk?	1800-GOT-JUNK?	\$620.00	Agent	DARLING	03 9598 5657	0414 303 968	9856324	✓✓
Adam Plumber		\$352.00	Plumber, Removalist, Electricians, Owner	PARRAMATTA		0424515115	9856324	✓✓
The Builder	BOB	\$0.00		SMILETOWN		0434 369 841	21434654656	✓✓
Boris Venn Handyman Services	VENN	\$0.00	Handyman	EPPING		0413434 345	43254456543	✓✓
Brett Earle		\$600.00	Agent	MELBOURNE		0424515115		✓✓
DARRYL JOHN HAMMOND		\$750.00	Plumber, Gardening				19354173582	✓✓
Dean Scarce Electrical PIL	DEANSELEC	\$18,401.86	Electricians, Gardening, Plumber, Handyman, Removalist		03 9856 5264	+61414392000	85975685212	✓✓
Folio Supplier 100	111	\$4,569.91	Handyman				67888889	✓?
Glens Doors		\$0.00		SMITHTOWN			4645464848792	??
Glens Plumbing		\$0.00	Plumber	SYDNEY				✓✓
Gym Equipment Australia		\$0.00		ST KILDA			234543333	??
Henry The Man	35555	\$0.00	Handyman	SYDNEY	0288765678	0412654655	1238766	✓✓
Hornsby Garden Maintenance	HORNS	\$0.00	Gardening	WAHROONGA		0412 345 345	21434434545	✓✓
Jack of All Trades	JACK	\$600.00					0423945443	✓✓
Joe's Plumbing	22345	\$0.00		REDSTONE	0398767837	0402799887		✗✗
John Electrical		\$0.00	Electricians				8521446	✗✗
JOHN RAYMOND SCHMIDT		\$0.00	Window Cleaner				90180473311	??
John the water man		\$0.00						??

35 selected

Compliance

Email

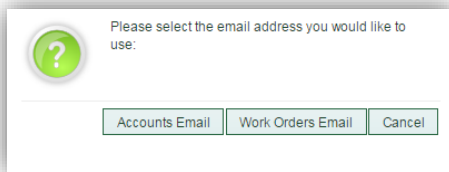
Export

Add Mailing Labels

Add

View

You will see this screen pop up

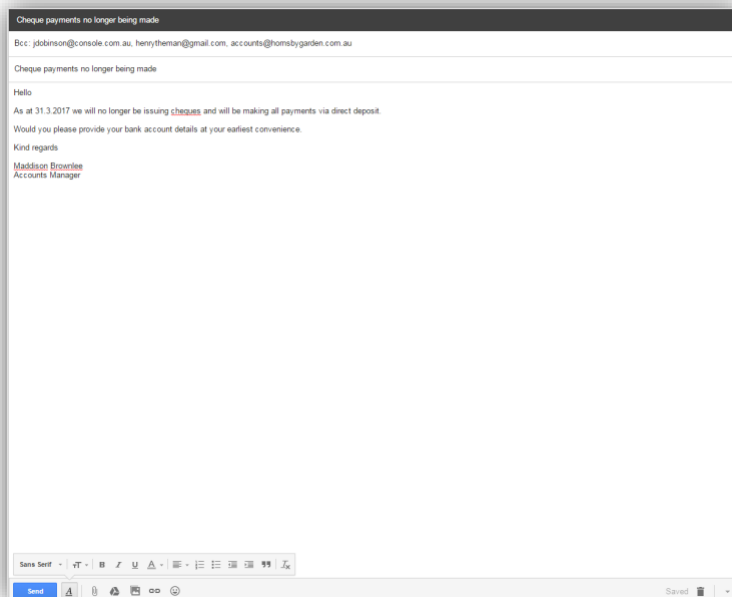


All Supplier cards allow for an Account Email address and a Work Orders Email address. For full details on adding the emails, see the Manual “Supplier Card”. Choose the option you want depending on the subject of your email.

This will open your email account. Type your message and click *Send* when done.



Recipients will automatically be Bcc'ed so they can't see one another's email address



These emails are sent from your email account and will show in the Sent items of your email account. To save them into PropertyIQ Strata, you will need to create a PDF or Image file and upload into Documents. See the manual “Documents” for full details.

EXPORT BUTTON

Click on the *Export* button on the bottom of the screen to export all the supplier information for any suppliers selected on the screen. **Do Not** use this button to send information to an external compliance provider such as Trades Monitor

1. Type some key letters in any of the empty boxes on this line to refine your search and find the lot owners you want to export
2. Click in the boxes on the left to select the suppliers you want to export. (or click in the top line to Select All)
3. Click on the *Export* button.

PropertyIQ Strata

File To Do Processing Billing End of Period Utilities Log Out

Suppliers

Supplier Name Supplier Code Balance Type Suburb Phone Mobile ABN Compliance

1800-Got-Junk? 1800-GOT-JUNK? \$620.00 Agent DARLING 03 9598 5657 0414 303 968 9856324

Adam Plumber \$352.00 Plumber, Removalist, Electricians, Owner PARRAMATTA 0424515115 9856324

The Builder BOB \$0.00 SMILETOWN 0434 369 841 21434654656

Boris Venn Handyman Services VENN \$0.00 Handyman EPPING 0413434 345 43254456543

Brett Earle \$600.00 Agent MELBOURNE 0424515115

DARRYL JOHN HAMMOND \$750.00 Plumber, Gardening 19354173582

Dean Scarce Electrical PIL DEANSELEC \$18,401.86 Electricians, Gardening, Plumber, Handyman, Removalist 03 9856 5264 +61414392000 85975685212

Folio Supplier 100 111 \$4,569.91 Handyman 67888889

Glens Doors \$0.00 SMITHTOWN 4645464848792

Glens Plumbing \$0.00 Plumber SYDNEY 234543333

Gym Equipment Australia \$0.00 ST KILDA 234543333

Henry The Man 35555 \$0.00 Handyman SYDNEY 0286765678 0412654655 1238766

Hornby Garden Maintenance HORNS \$0.00 Gardening WAHROONGA 0412 345 345 21434434545

Jack of All Trades JACK \$600.00 0423945443

Joe's Plumbing 22345 \$0.00 REDSTONE 0398767837 0402799887

John Electrical \$0.00 Electricians 8521446

JOHN RAYMOND SCHMIDT \$0.00 Window Cleaner 90180473311

John the water man \$0.00

35 selected

Compliance Email Export Add Mailing Labels Add View

This will create an Excel spreadsheet in CSV format.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	A									
1	Name	Supplier	CABN	Contact	Address 1	Address 2	Address 3	Suburb	Postcode	Phone	Mobile	Fax	Accounts	Work	Ord-Type	Payment	Cheque	P	BPAY	Bille	BSB	Account	N	Account	T	Public	Lial	Public	Lial	OHS	Statu	OHS	Expir	Complian	Last	Paid	Date
2	Sundry Creditor			testing a really long name to see what happens												Direct	djgdjfdj																				
3	Managing Agent	5.45E+08			address 1	address 2		SUBURB	3333							Direct	Managing	65987	123-456	1212121		1212121		title	Owner												
4	Tax Creditor															Bpay	mm	supplie	43435																		
5	Dean Scar	DEANSELE	8.6E+10		82 Charter	Carlton	VIC	3053		03 9856 52	6.14E+10		stephanie steveh@p	Electrician	Bpay	Dean Scar	12345	182-222	5.87E+08	Dean Scar	Valid	01/11/14	Valid	01/11/14	Valid	01/11/14	Valid	01/11/14	Valid	01/11/14	Valid	01/11/14	Valid	01/11/14	Valid	01/11/14	Valid
6	TESTER		123456													TESTER	111-111	1.11E+08	TESTER	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	
7	Locksmith	LOCSUP	5.41E+10		John Smit	3 City	Street	Melbourn	3000	85861245			rebeccap@rebeccap	Security	Cheque	John Smith	183-334	2245784	Locksmith	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	01/09/14	Valid	
8	ron a	GARDENS	1.25E+09	ron	currie	street		adelaide	5000		4.2E+08		rebeccap@rebeccap	Gardening	Cheque	Ron A	5688			Restricted	31/12/14	Invalid	28/02/15	01/12/14	11/07/16												
9	1800-Got-1800-GOT-		9856324		PO Box	1274		DARLING	3145	03 9598 56	0414 303 968		steveh@p	steveh@p	Agent	Bpay	12345			Valid	01/03/18	Valid	01/03/18	Valid	01/03/18	Valid	01/03/18	Valid	01/03/18	Valid	01/03/18	Valid	01/03/18	Valid	01/03/18	Valid	
0	DARRYL JOHN HAMM	1.94E+10											rebeccap@rebeccap	Plumber	Direct		96503	182-222	5487521	Chester p	Valid	31/01/16	Valid	31/01/16	Valid	31/01/16	Valid	31/01/16	Valid	31/01/16	Valid	31/01/16	Valid	31/01/16	Valid		

ADD MAILING LABELS BUTTON

Use the *Add Mailing Labels* button to create labels that can be printed later from the Mailing Labels area.

1. Type some key letters in any of the boxes on the top line to refine your search and find the suppliers you want to print labels for
2. Click in the boxes on the left side of the page to select the suppliers you want. (Or click in the top line to select all suppliers on the screen)
3. Click on the *Add Mailing Labels* button

Supplier Name	Supplier Code	Balance	Type	Suburb	Phone	Mobile	ABN	Compliance
1800-Got-Junk?	1800-GOT-JUNK?	\$620.00	Agent	DARLING	03 9598 5657	0414 303 968	9856324	✓✓
Adam Plumber		\$352.00	Plumber, Removalist, Electricians, Owner	PARRAMATTA		0424515115	9856324	✓✓
The Builder	BOB	\$0.00		SMILETOWN		0434 369 841	21434654656	✓✓
Venn Handyman Services	VENN	\$0.00	Handyman	EPPIING		0413434 345	43254456543	✓✓
Brett Earle		\$600.00	Agent	MELBOURNE		0424515115		✓✓
DARRYL JOHN HAMMOND		\$750.00	Plumber, Gardening				19354173582	✓✓
Dean Scarce Electrical PIL	DEANSELEC	\$18,401.86	Electricians, Gardening, Plumber, Handyman, Removalist		03 9656 5264	+61414392000	85975685212	✓✓
Folio Supplier 100	111	\$5,838.02	Handyman				67888889	✓✓
Glens Doors		\$0.00		SMITHTOWN			4645464848792	✓✓
Glens Plumbing		\$0.00	Plumber	SYDNEY				✓✓
Gym Equipment Australia		\$0.00		ST KILDA			234543333	✓✓
Henry The Man	35555	\$0.00	Handyman	SYDNEY	0288765678	0412654655	1238766	✓✓
Hornsby Garden Maintenance	HORNS	\$0.00	Gardening	WAHROONGA		0412 345 345	21434434545	✓✓
Jack of All Trades	JACK	\$600.00				0423945443		✓✓
Joe's Plumbing	22345	\$0.00		REDSTONE	0396767837	0402799887		✗✗
John Electrical		\$0.00	Electricians				8521446	✗✗
JOHN RAYMOND SCHMIDT		\$0.00	Window Cleaner				90180473311	✓✓
John the water man		\$0.00						✓✓

Add Mailing Labels

Type: Suppliers
Address Options
☒ Contact Details

+ Add X Cancel

The contact details circle is selected by default. Click on the + *Add* button to create the mailing labels job. For full details on printing mailing labels, see the manual “Mailing Labels”

ADD BUTTON

Click on the +*Add* Button to add a new supplier to the program. For full details on adding a supplier, see the manual “Supplier Card”

VIEW BUTTON

Click on the *View* Button to view the supplier card for a supplier that is selected on the screen. For full details on the supplier card, see the manual “Supplier Card”