PropertyIQ

Supplier screen

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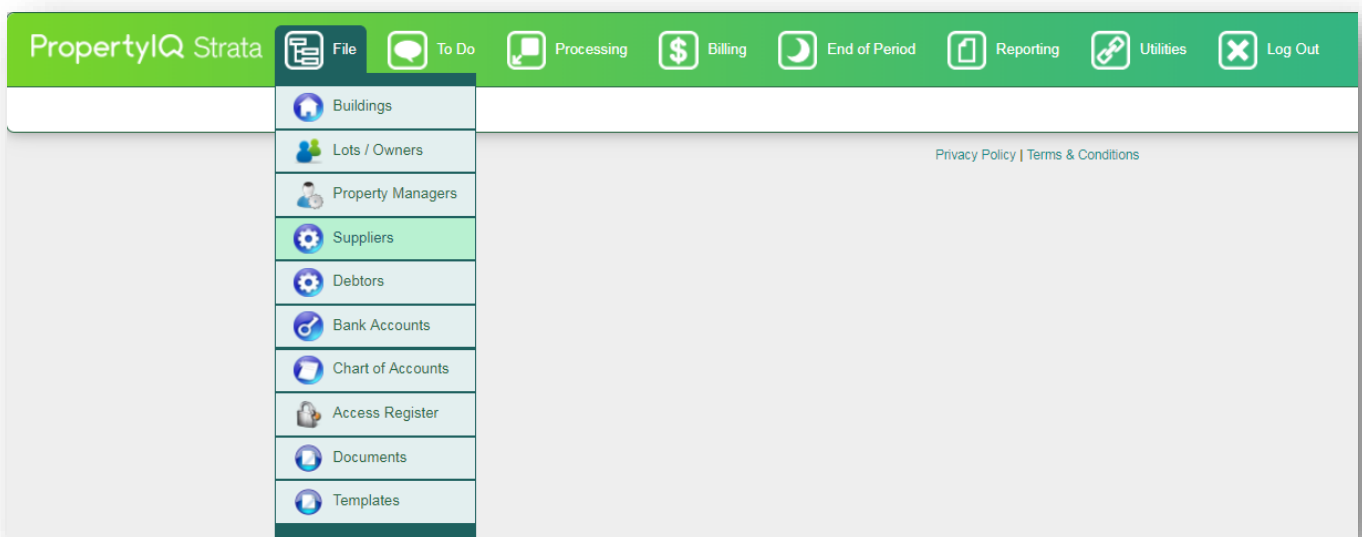
INTRODUCTION TO THE SUPPLIER SCREEN

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 colum 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 showsin 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 tht 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. Ths is handy reference when creating work wrders. 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.

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.

NOTE   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.

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

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.

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
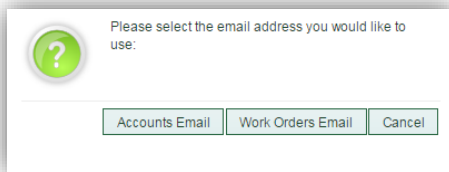
You will see this screen pop up

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 acount. Type your message and click *Send* when done.

 Recipients will automatically be Bcc'ed so they can't see one another's email address
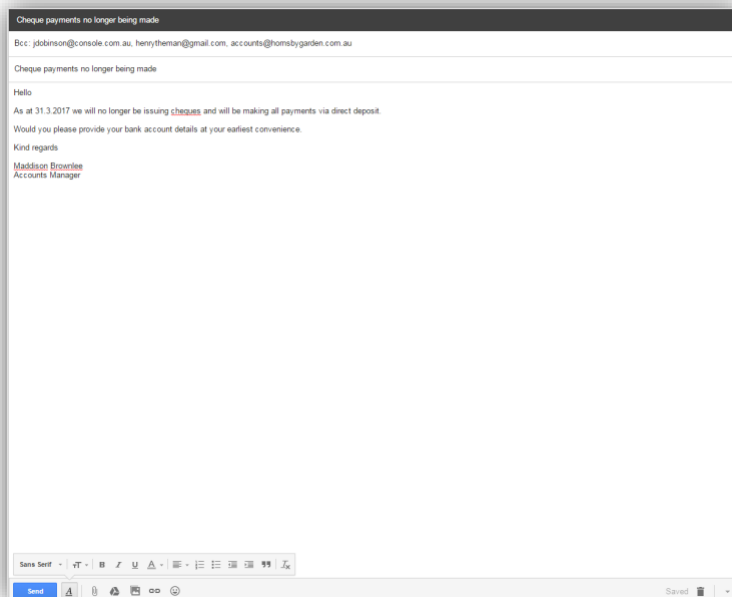
 These emails are sent from your email account and will show in the Sent items of your email account. To save them into PropertyIQ Strata, you willl need to create a PDF or Image file and upload into Documents. See the manual "Documents" for full details.

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.

This will create an Excel spreadsheet in CSV format.

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

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"