Working with Folios

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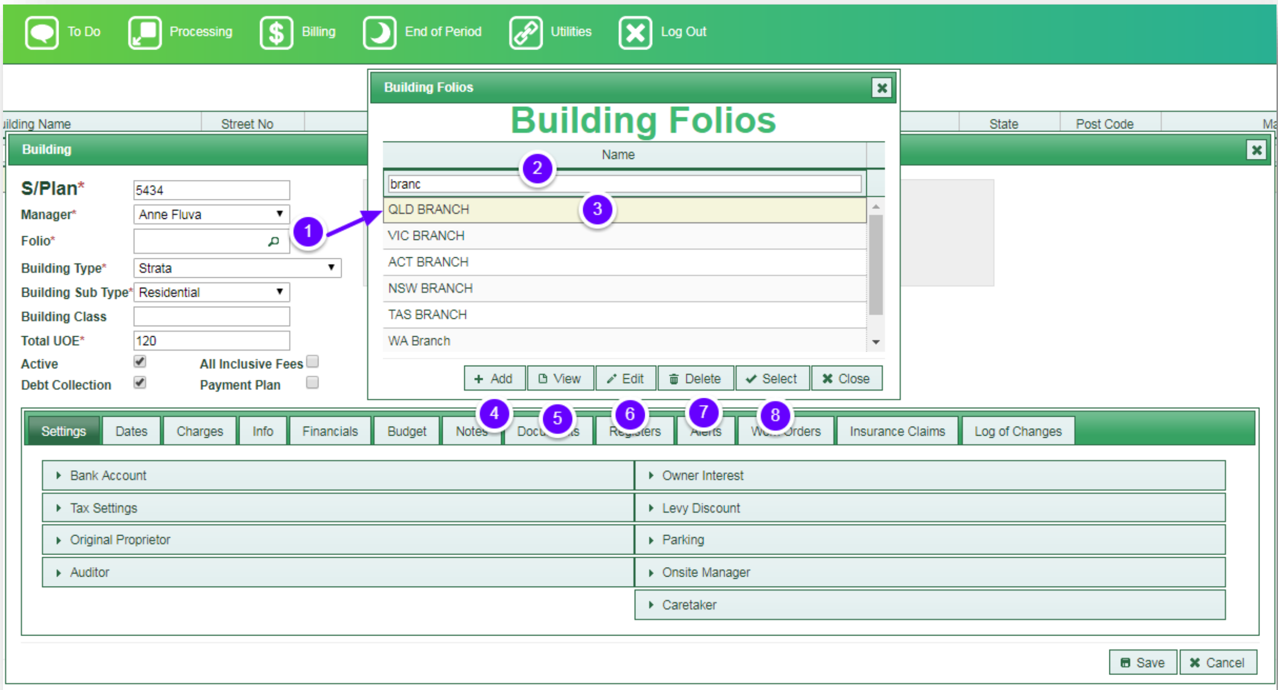
INTRODUCTION TO FOLIOS

The Folio functionality in PropertyIQ allows you to assign one or more strata managers and other users to a group of managed buildings. If you have a single office, you could assign teams to a folio. If you have multiple branches you can also utilise the folio functionality and set each branch up as a folio.

CREATING AND EDITING FOLIOS

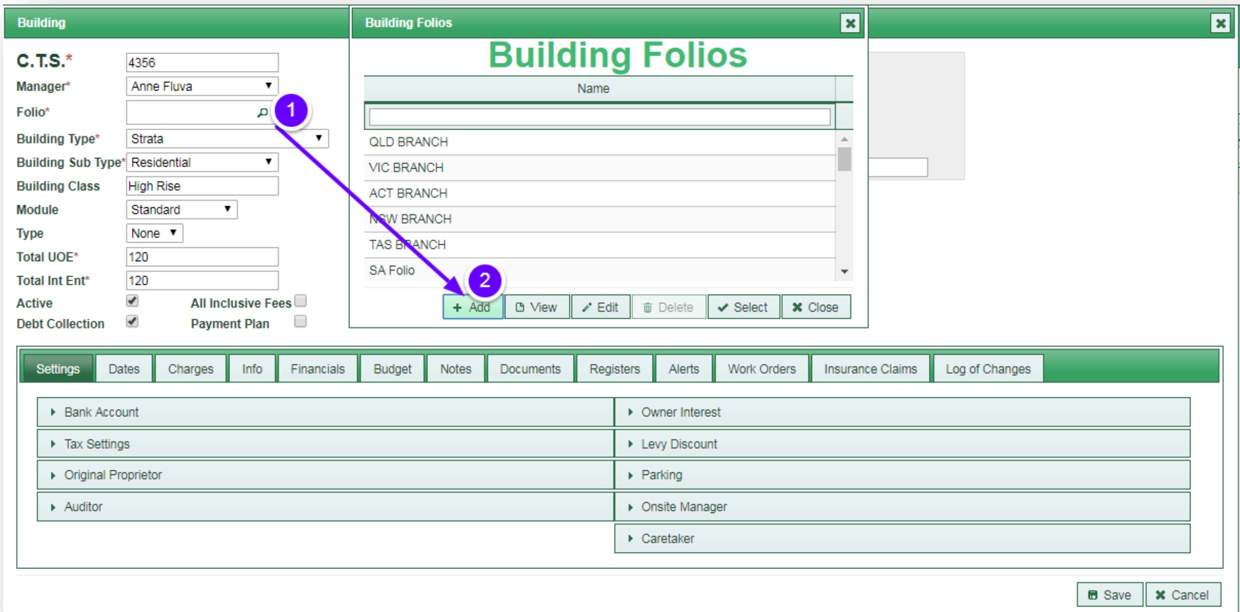
You can add, edit and delete folios from any building card.

1. From any building card, click on the search icon to look for a folio
2. Type some key letters in the empty box on the top line to refine your search
3. Click on a folio to highlight it, and then double click to open it.
4. Click on the *+Add* button to add a new Folio
5. Click on the *View* button to view a folio you have highlighted on the screen
6. Click on the *Edit* Button to edit a folio you have highlighted on the screen
7. Click on *Delete* to delete a folio. You will only be able to delete a folio that doesn't have any buildings attached to it
8. Click on the *Select* button to select a folio you have highlighted on the screen. The building will now be attached to the selected folio.

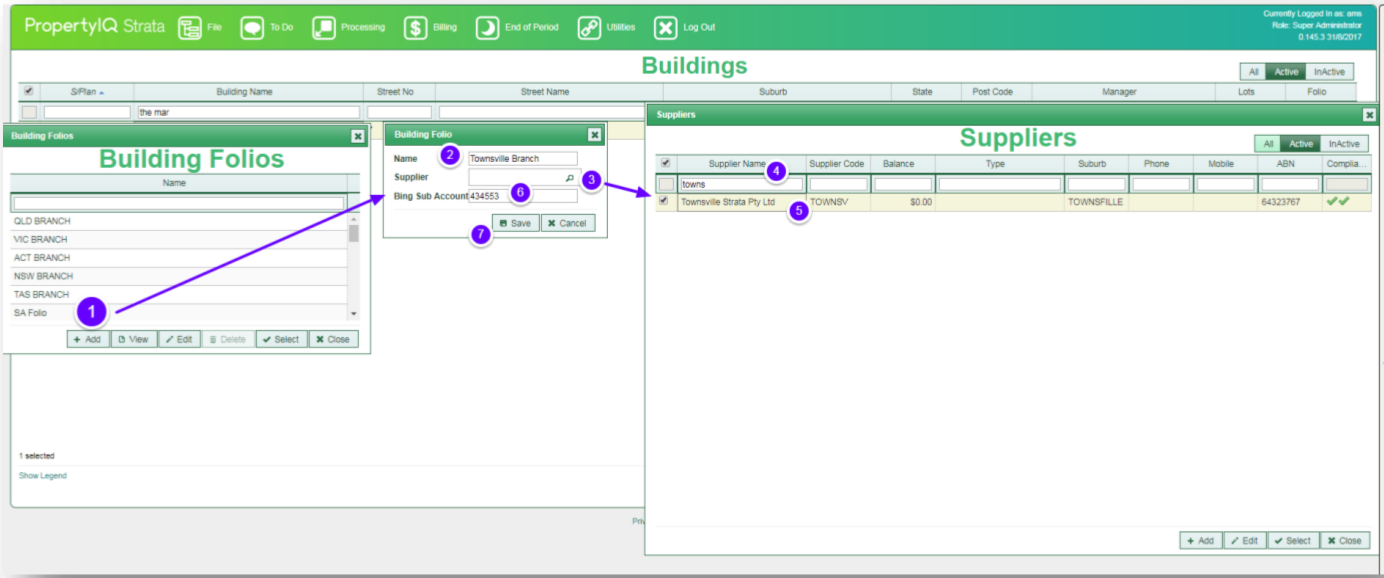


ADDING A NEW FOLIO

1. Click on the search icon from the folio box
2. Click on the *+Add* button

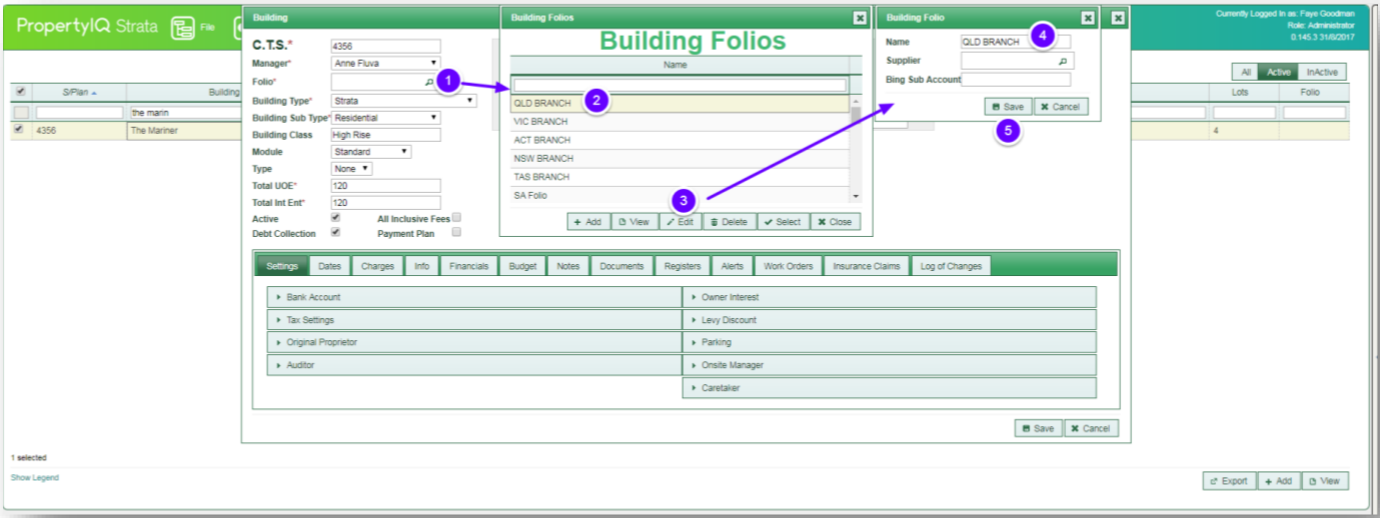


1. When you click on the *+Add* button, the folio card will pop up
2. Type a name for the new folio
3. If the folio is acutally another entity, for example a branch office that has a different ownership, you can select a supplier to receive all management fees for that Folio. Click on the search icon to look for the supplier you want. This will open the suppliers screen.
4. Type some key letters in any of the empty boxes on the top line to refine your search. If your supplier is not already recorded, you can add suppliers from the the suppliers screen here. For information about adding suppliers, see the manual "Supplier Card"
5. Click and then double click on the supplier you want, to select them
6. If this folio is actually another entity, and has its own account with Bing Mailing Service you can enter the Bing account number here.
7. *Save*. You will now be able to attach any building you choose to the new folio.



EDITING AN EXISTING FOLIO

1. From any building card, click on the search icon to search for the folio you want to edit
2. Click on the folio you want to edit, to highlight it
3. Click on the *Edit* button
4. Type any changes you want to make
5. Click *Save* to save your changes.



SETTINGS FOR FOLIOS

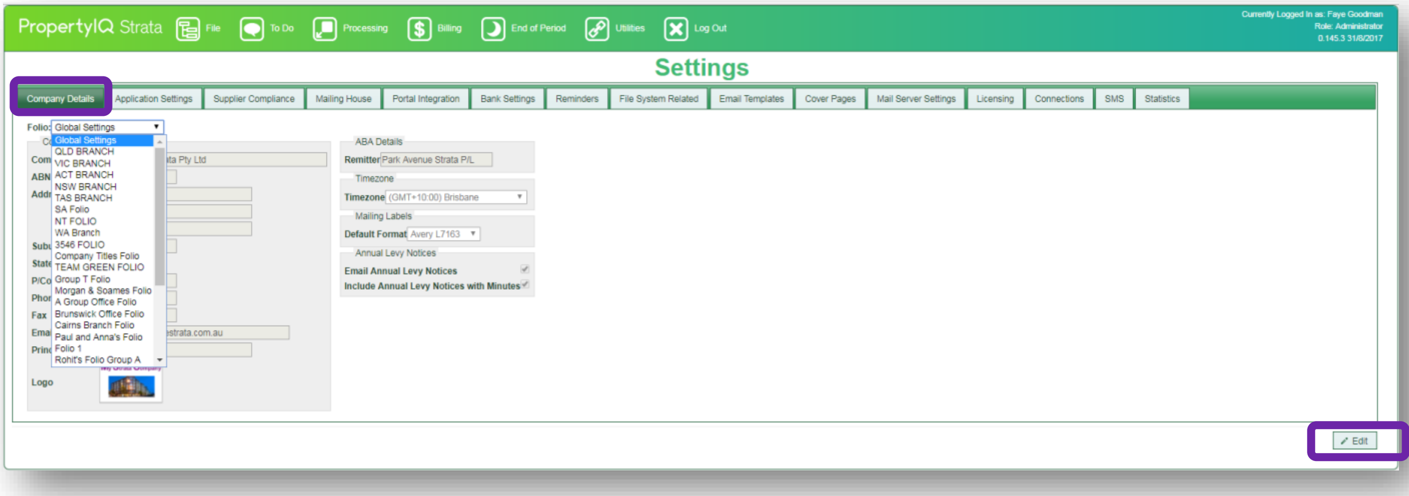
The folios functionality allows you to set up a number of specifications and defaults for each folio. This is really useful if your folios are actually separate entities.

NOTE The ability to edit settings is usually restricted to the administrator role, but permissions can be edited for each user.

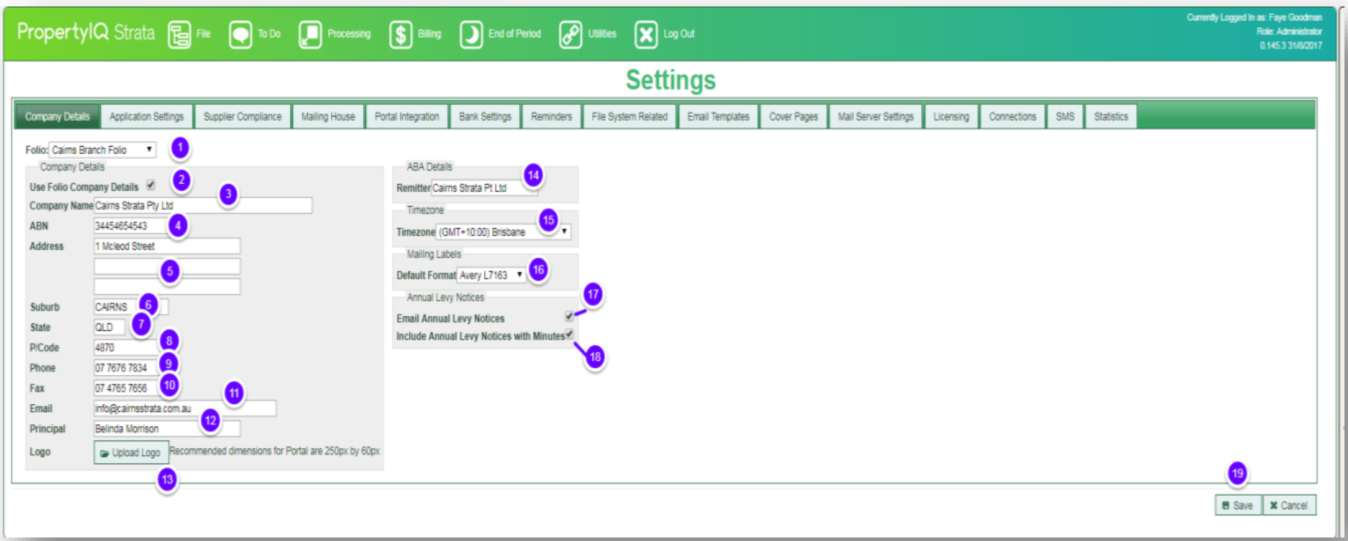
To get started go to the Utilities menu and select *Settings*.

The company details tab is the default tab. Click on the *Edit* button to start editing your settings.

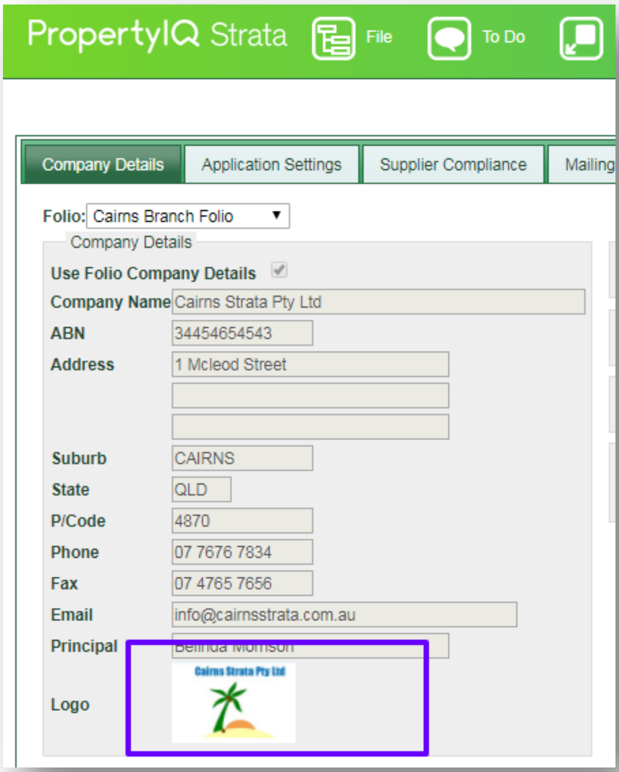
Click on the folios dropdown list and select the folio that you want to create settings for, from the list.



1. The folio you selected will now show in the dropdown list
2. Click here to enble using the details you are entering here on templates, ABA files etc.
3. Type the name of the folio company here
4. Type the ABN of the folio company here
5. Type the street address of the folio company here
6. Type the suburb of the folio company here
7. Type the state of the folio company here
8. Type the postcode of the folio company here
9. Type the main phone number for the folio company here
10. Type the main fax number for the folio company here
11. Type the main email for the folio company here. This will show on templates for this folio and will also be the default email when setting reply options for program generated emails.
12. Type the name of the folio company principal here
13. Click here to upload a logo from your computer. Take note of the recommended dimensions if you are going to use the owners portal for this company.
14. Type the remitter name to appear on any ABA files that are generated by this company to make supplier payments
15. Select the correct timezone for the folio company’s location
16. If you are using mailing abels, select the default layout for any mailing labels that are created for the folio company. You can also add and edit mailing label formats from the mailing labels function. For full details, see the manual “Mailing Labels”
17. Click here if you want annual levy notices to be emailed out once a new budget is accepted and the levies are struck
18. Click here if you want the annual levy notices that were created when the new budget was accepted, to be attached as the front page of your AGM minutes.
19. *Save* when you are ready



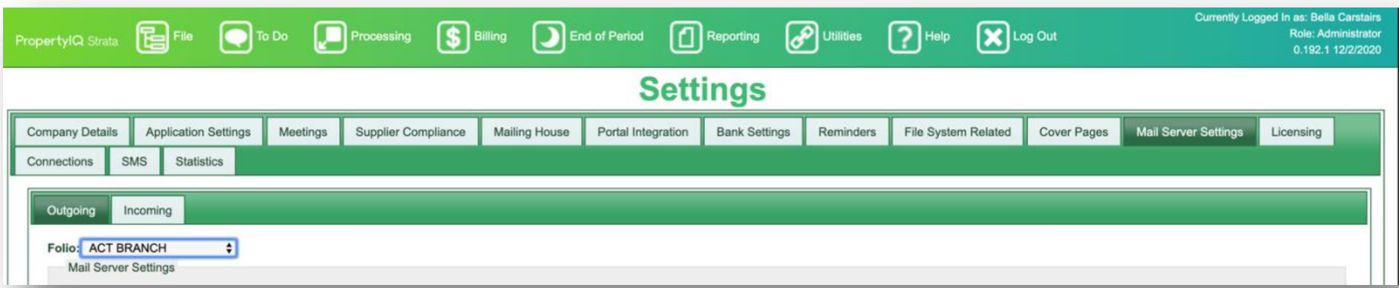
If you have uploaded a logo, it shows here



Repeat this process for all your folios.

OUTGOING MAIL SERVER SETTINGS FOR FOLIOS

If you use different mail servers for different folios, you can set them from the Settings>Mail Server Settings area. See the "Settings" manual for full details.



FOLIO SPECIFIC ROLES

You can give a user full or partial permisions to work within their own folio only.

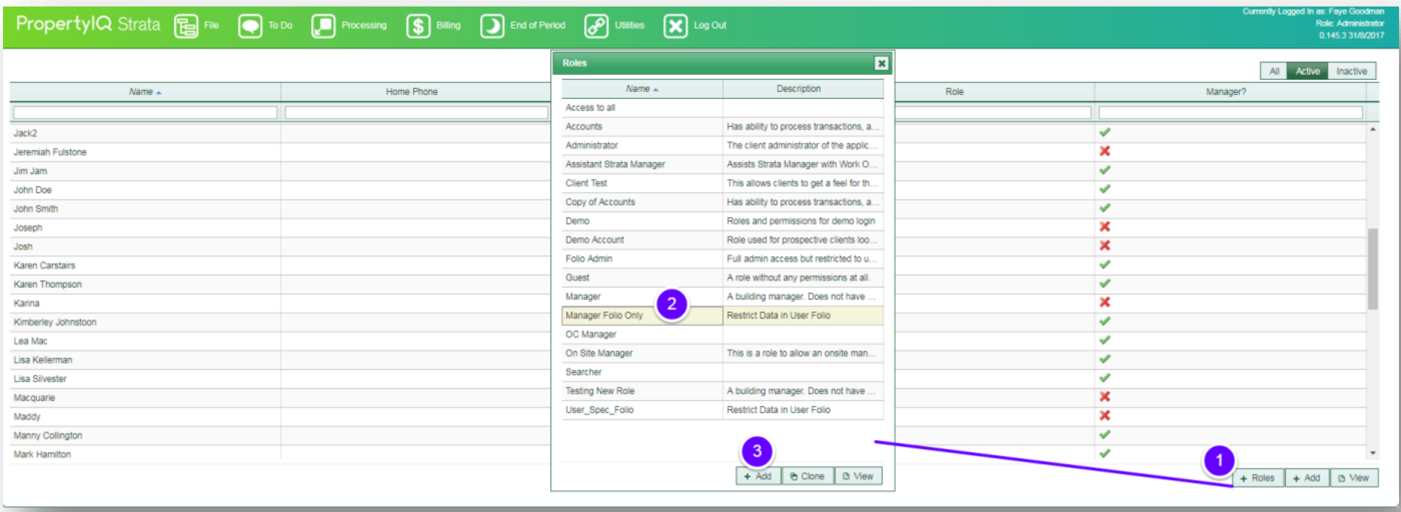
The ability to edit roles and users is usually restricted to the administrator role only.

There are two steps to this processs.

First you need to create a “folio specific” role

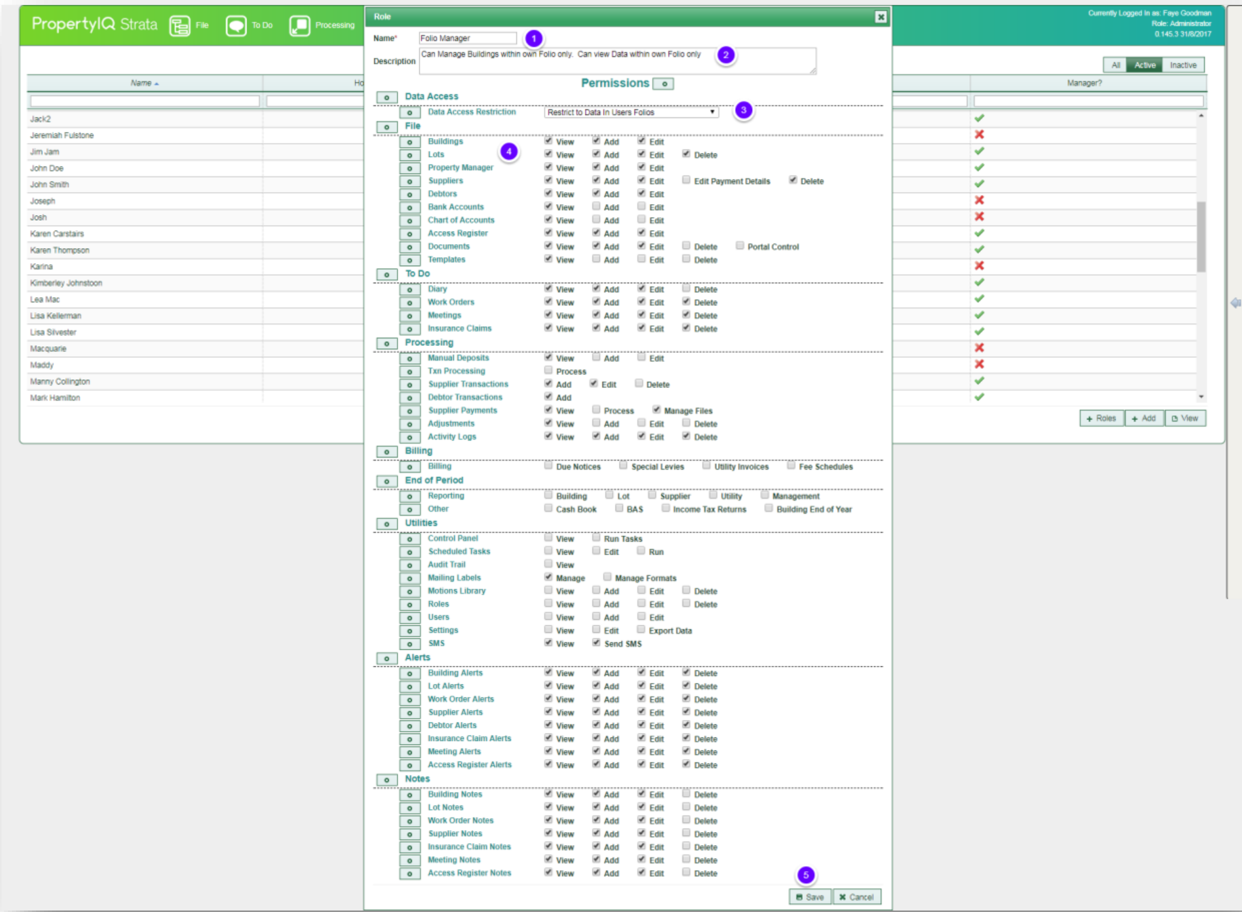
Go to the Utilities Menu and select *Security*

1. Click on the *+Add* button to add a new Role
2. Check to see if you already have any folio specific Roles set up
3. Click on +Add to add a new role



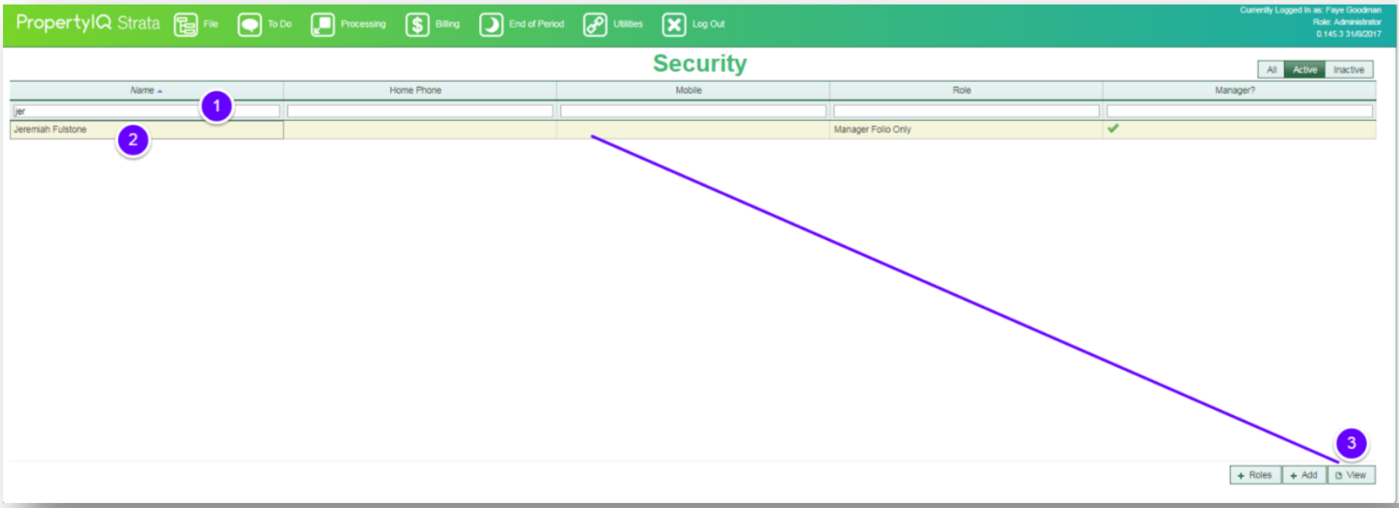
You can now define the permissions that will be attached to this role

1. Type a name for the new role
2. Type a description for the new role
3. Select “Restrict to Data in Users Folios
4. Click to tick all the permissions you want the new role to have
5. Click Save when you are ready to save the new role



Next, assign the role to the appropriate user(s)

1. On the *Security* creen, type some key letters to refine your search and find the user you want to assign the new role to. For full details on adding a new user, see the manual “Users, Roles and Permissions”
2. Highlight the user you want to work with and then double click to select them *or*
3. *View*



You can now view the user’s card

1. Click the folio specific role you just created from the dropdown list
2. Click to choose their primary folio
3. You can also choose other folios for this user to be able to access. Click on each one you want to add to select them. You can add as many as you want.