PropertyIQ™

PIQ+ Readiness Wizard

Quick Reference Guide

Version 1. April 2025

Overview

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Description	• This is a Quick Reference Guide for the **PIQ+ Readiness Wizard**.
	• You'll need to run the PIQ+ Readiness Wizard for all users in your business as the **first step** of onboarding to PIQ+.

What you'll learn	This guide will assist you to navigate the following:
	• What is PIQ+ readiness wizard
	• What you need to do before the wizard
	• How to run the wizard

Who should read this	• Users responsible for managing PIQ Users
	• Administrators

Read time	7 minutes

What is PIQ+ readiness wizard

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The PIQ+ readiness wizard

- allows access to PIQ+

- enables single sign-on so users can navigate between PIQ and PIQ+ without logging in again

- forces users to login into PropertyIQ with a **unique email address** once the wizard is run

- updates you to the new log in screen for PropertyIQ.

💡 **TIP**

- You only need to **run the wizard once** for your business. This will validate and enable all existing users in your PropertyIQ. When creating new users, they'll be automatically validated and enabled for PIQ+ as part of the creation process using the login email field.

User login email (same as email field on user card)

New log in screen

What you need to do before the wizard

Before running the PIQ+ readiness wizard, you'll need to:

1 Review and tidy up all your users in PropertyIQ under **Utilities> Security**.

2 Deactivate any redundant and/or unnecessary users.

3 Ensure each user has a **unique email address**.

You can use the **Login Email** column to easily review, search and sort users by email address.

! IMPORTANT NOTE
- PIQ+ requires each user to have a **unique email address** that'll be used for logging in.
- If you have multiple users sharing the same email and/or a missing email address for a user, you'll need to update their user details in PropertyIQ.

💡 TIP
- You can edit and deactivate users from the PIQ+ Readiness Wizard screen as you go. The wizard screen will show you a preview of all your users and whether there are any issues with individual users.

How to run the wizard

There are 9 steps to running the PIQ+ readiness wizard. Below are steps 1-2.

1 > 2 > 3 > 4 > 5 > 6 > 7 > 8 > 9

1 In PropertyIQ, go to **Utilities>Security** menu.

2 Click the **PIQ+ Readiness Wizard** button.

How to run the wizard (continued)

There are 9 steps to running the PIQ+ readiness wizard. Below are steps 3-5.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |

3 — **Pending** tab will show all users that have not been processed through the wizard and still need to be checked and validated.

4 — **Completed** tab will show all users that have been processed through the wizard. These users have a valid email address and password and can successfully log into PIQ+.

5 — **Users with missing or non-unique emails** - you need to take action and update user details.

For the users that appear under this section, you will either need to:
- Enter an email address for the user as it's missing
- OR Update the email address for the user as the current one is not unique

Once you've updated the user, the table will automatically refresh to remove the user from this section. They will then appear in one of the other two sections to complete the process.

PIQ+ Readiness Wizard

3 Pending | **4** Completed

▼ Users with missing or non-unique emails

With the new login experience, users will need a unique email address. The users listed below either don't have an email or they're sharing an email with another user as specified in the Description column.
Please provide a new unique login email for these users by double clicking on them in the table.
You can also deactivate any users by double-clicking on them in the table.

5

Name ▲	Login Email	Email	Description
			Please specify an email
			Please specify an email
			Please specify an email
			Please specify an email

▼ Users requiring a password reset

The users listed below haven't logged in for a while and need to reset their passwords. Their details will be updated as specified in the Description column. Their passwords will be reset and they'll receive an email with a temporary password when you click 'Complete'.
You can also deactivate any users by double clicking on them in the table.

Name ▲	Login Email	Email	Description

How to run the wizard (continued)

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There are 9 steps to running the PIQ+ readiness wizard. Below are steps 6-7.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
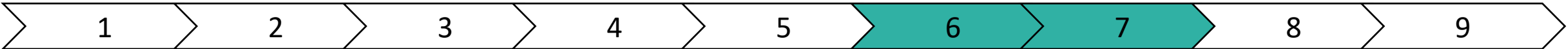
6 **Users requiring a password reset -** the users in this section haven't reset their passwords for over 12 months and must firstly reset their passwords to be able to log into PIQ+.

- If these users are still required, you can automatically trigger a password reset by completing the next step – see Step 7.
- OR you can deactivate them by double clicking on them and selecting the Deactivate button on the user card.

7 Click the **Complete** button to trigger a password reset for the users displayed in the table.

After clicking complete, the users will then appear in the **Completed** tab at the top of the screen and can successfully log into PIQ+ on their next login.

PIQ+ Readiness Wizard

Pending | Completed

▸ Users with missing or non-unique emails

▾ Users requiring a password reset

The users listed below haven't logged in for a while and need to reset their passwords. Their details will be updated as specified in the Description column. Their passwords will be reset and they'll receive an email with a temporary password when you click 'Complete'.
You can also deactivate any users by double clicking on them in the table.

Name ▲	Login Email	Email	Description
			Password will be reset

✔ Complete

▾ Users ready to move to PIQ+

The users listed below have a valid email address and password.
Their details will be updated as specified in the 'Description' column when you click 'Complete'.

Name ▲	Login Email	Email	Description

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There are 9 steps to running the PIQ+ readiness wizard. Below are steps 8-9.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |

8

Users ready to move to PIQ+ – the users in this section have a valid email and password. Their email address will be used as their login once they're processed through the wizard –

Continue to Step 9.

9

Click the **Complete** button to update the users login email.

After clicking complete, the users will then appear in the **Completed** tab at the top of the screen and can successfully log into PIQ+ on their next login.

All done! Your users are now ready to use PIQ+ and will have single sign-on between PropertyIQ and PIQ+.