

Fixflo

QubePM Integration

How it works and onboarding guide



Crown
Commercial
Service
Supplier



What is covered.

- How the integration works and how we sync data from your QubePM system to your Fixflo system.
- A step-by-step guide to how to start the set-up and what data we require from you to get started.
- A detailed look at the next steps in our onboarding process and get the integration up and running.

System Requirements

- You will need an existing QubePM environment running version 12.1
- You must use the 'Property Management' Module and 'Funds Ledger' Module in Qube as they are separate APIs and we use both for the integration.



How the integration works



Overview - Entity and data sync

- Sync Frequency:
 - **Daily sync:** Properties, Landlords, Tenants, Contractors. This means that when you add any of these entities to Qube if they meet the correct criteria will be synced (sent) over to Fixflo within a day.
 - **Near live-time:** Issues & Documents

Entities that are synced to Fixflo from Qube:

- Properties
- Units
- Tenants
- Owners
- Contractors
- Cost codes

Data that we send to Qube:

- Works orders (Issues)
- Purchase Orders
- Invoices

Properties

- Properties from Qube are sent to Fixflo and synced as 'Blocks'.
- A block will need a **postcode**, **first line of address**, a **property status** and **property type** that we have set to sync across.
- A block is archived in Fixflo when the status or type is different to what is set.
- What we sync is dependant on what status and type is set for each property which can be set to your liking, we will need the status and type of the properties that you want sent to Fixflo. This is in the 'How to set it up' section of the guide.
- Field mapping of data we sync:

Fixflo Property (Block within the API) Field	Qube PM Property Field
ExternalBlockRef	Reference
Name	Description
AddressLine1 AddressLine2 Town	Line 1 = AddressLine 1 Line 2 = AddressLine2 Line 3 = Town Line 4 = County
PostCode	Postcode

How properties are archived in Fixflo

- A property must fulfil all the sync criteria in order to be added to Fixflo.
- If a property doesn't have a first line of address and/ or a postcode then the property will not sync or will be archived.
- If a property changes status and / or type that hasn't been set up to sync then the property will be archived.

Units

- Units in Qube are synced as Units in Fixflo.
- For a unit to sync into Fixflo it **must be associated with a block (property) that we sync**.
- Unit must have a **status** and **type** that has been set to sync over to Fixflo.
- What we sync is dependant on what status and type is set for each unit which can be set to your liking, we will need the status and type of the properties that you want sent to Fixflo. This is in the 'How to set it up' section of the guide.
- Field mapping of what data we sync:

Fixflo Unit (Property within the API) Field	Qube PM Field
ExternalPropertyRef	Unit Reference
AddressLine1 AddressLine2 Town	Unit Description Line 1 = AddressLine 1 Line 2 = AddressLine2 Line 3 = Town Line 4 = County
PostCode	Postcode

How Units are archived in Fixflo

- A Unit must fulfil all the sync criteria in order to be added to Fixflo.
- If a unit changes status and / or type that hasn't been set up to sync then the property will be archived.
- If a unit is not associated with a block then it will not be synced / archived.

Tenants

- Tenants are synced as 'Leaseholders' in Fixflo.
- For a Tenant to be synced it **must be associated with a unit we sync**
- Tenant must have a **status** and **type** that has been set to sync over to Fixflo.
- What we sync is dependant on what status and type is set for each property which can be set to your liking, we will need the status and type of the properties that you want sent to Fixflo. This is in the 'How to set it up' section of the guide.
- Field mapping of what data we sync:

Fixflo Leaseholder (Tenant within the API) Field	Qube PM Field (Tenant or Alt Address)
ExternalRef	Tenant Reference (Alt address record number is appended to end for uniqueness when an alt address)
CompanyName	Name
AddressLine1 AddressLine2 Town	Line 1 = AddressLine 1 Line 2 = AddressLine2 Line 3 = Town Line 4 = County
PostCode	Post code
ContactNumber	Telephone[1]
ContactNumberAlt	Telephone[2]
Email	Email[1]

- Owners are synced as 'Landlords' in Fixflo
- Owners must be associated with a block (property) that is synced.
- As contact details in Qube are contained within the address, we have the following logic in place:
 - If there is no associated addressee for an owner they'll still be synced, but no contact details will be synced.
 - If an owner has multiple addresses, all address details will be synced. The email address and phone number will be taken from the first address.
- Field mapping of what data we sync:

Fixflo Landlord Field	Qube PM Field (Owner address)
ExternalRef	Owner reference
DisplayName	Name
CompanyName	Company
AddressLine1 AddressLine2 Town County	Line 1 = AddressLine 1 Line 2 = AddressLine2 Line 3 = Town Line 4 = County
PostCode	Postcode
ContactNumber	Telephone[1]
EmailAddress	Email[1]

Suppliers

- Suppliers are synced as 'Contractors' in Fixflo
- A contractor is not synced if they are, if 'locked for posting' is set to:
 - Posting invoices
 - Posting orders
- If set to 'no' the contractor is synced to Fixflo.

Location of 'locked for posting' in Qube.

Purchase ledger > Supplier accounts > Edit

Locked for posting setting located at the bottom of page.

Disclaimer: The send to Fixflo checkbox is not functional with this integration and is used for the old Qube owned integration.

Supplier data

Field mapping of what data we sync:

Fixflo Contractor Field	Qube PM Supplier Field
ExternalContractorRef	Reference
AddressLine1 AddressLine2 Town County	Line 1 = AddressLine 1 Line 2 = AddressLine2 Line 3 = TownLine 4 = County
PostCode	Postcode
CompanyName	Name
EmailAddress	Email address specified by the supplier's Purchase Order Email setting (found on the correspondence tab of the supplier in Qube PM 2018+) or via a configuration setting pre 2018.
EmailCC	Email address is added here, instead of 'EmailAddress', if the email address is already used by another contractor on Fixflo, in which case the 'EmailAddress' field is cleared.
Tel1	Telephone[1]
Tel2	Telephone[2]

Fund schedule headings

Fixflo

- Fund schedule headings are synced to Fixflo as building 'cost codes'.
- Building cost codes can be found in Fixflo under '**Blocks > Select Block > Block Profile > Cost codes**'
- Cost codes are synced if:
 - Fund-Schedule-Heading is not locked:
 - Fund-Schedule-Heading should be associated with a Property (a.k.a. Block) we sync
 - Fund-Schedule-Heading should have 'Use = Expenditure or Income/Expenditure or Apportion/Income/Expenditure or Loans'
- We archive cost codes that have a locked Fund-Schedule-Heading.

Archiving of Entities

- For a Property, Unit or Tenant if any of the sync criteria changes to something we do not sync then the entity will be archived in Fixflo. This can be any of the following:
- Properties:
 -

Setting up the Integration

We require a few items from you before we can proceed in setting up the integration. These are listed below and will go into more detail in the next slides.

- Which line number is associated with which addresses.
- The statuses and types you have for properties & units in Qube.
- The statues and types you have set for tenants in Qube.

Please email us back with the above information and we can get started on turning on the Qube integration



Address line numbers

Location in Qube - *Utility Modules > Tables Database > External Choices >...*

We require what the line number that is associated with each part of the address as well as how this named within your Qube system.

For example, Locality, Town/City. = 4.

In enquiry and maintenance, fields with blank labels will be hidden.

Fields marked " will be displayed, but will have no label beside them.

The line numbers refer to the lines retrieved from the Address Selector.

Addresses:

	Address:	Line number:
Unit name or number:	<input type="text"/>	<input type="text" value="1"/>
Building name or number:	<input type="text" value=""/>	<input type="text" value="2"/>
Street:	<input type="text" value=""/>	<input type="text" value="3"/>
Locality:	<input type="text" value="Town/City:"/>	<input type="text" value="4"/>
Town:	<input type="text" value="County:"/>	<input type="text" value="5"/>
Administrative area:	<input type="text" value="Country:"/>	<input type="text" value="6"/>
Postcode:	<input type="text" value="Postcode:"/>	<input type="text" value="7"/>

Contact details:

Main telephone number:	<input type="text" value="Telephone:"/>
Other telephone number:	<input type="text" value="Alt.Telephone:"/>
Mobile number:	<input type="text" value="Mobile:"/>
Fax number:	<input type="text" value="Fax:"/>
Main email address:	<input type="text" value="Email 1:"/>
Email address 2:	<input type="text" value="Email 2:"/>
Email address 3:	<input type="text" value="Email 3:"/>

Property / unit status

Location in Qube: Core Modules > Property Management > Property or Unit > Status

Property = Block in Fixflo.

- We will need the status you have set for properties and units to be sent over to Fixflo.
- The status we sync as default are: "let", "live", "under offer", "vacating".

The screenshot displays the 'Summary' tab of a property management system. On the left is a sidebar menu with options: Summary (selected), User Info, Values, Purchase Details, Insurance, Alterations, Notice Board, and Carbon Usage. The main content area shows property details for 'OGS Trust Ltd'. The 'Status' dropdown menu is highlighted with a red rectangular box and is currently set to 'LIVE'. Other visible fields include Owner (001), Reference (001-001), Known as (Fermoy House - Kensal Town), Address (Fermoy House, Fermoy Road, Kensal Town, London), Town/City (London), County, Country, Postcode (W9 3NJ), VAT elected (unchecked), Property type (RESIDENTIAL), Area code (S), Lifespan period (n/a to n/a), Election date (n/a), Tenure (Freehold), Portal Suite, IPD area, LocalAuth (Brent Council), Water (South East Water), and Property Manager (DM Peter Martin).

Owner:	001	OGS Trust Ltd
Reference:	001-001	
Known as:	Fermoy House - Kensal Town	
Address:	Fermoy House Fermoy Road Kensal Town London	
Town/City:	London	
County:		
Country:		
Postcode:	W9 3NJ	
VAT elected:	<input type="checkbox"/>	
Property type:	RESIDENTIAL	
Status:	LIVE	
Area code:	S	
Lifespan period:	n/a to n/a	
Election date:	n/a	
Tenure:	Freehold	
Portal Suite:	-	
IPD area:	-	
LocalAuth	Brent Council	
Water	South East Water	
Property Manager:	DM Peter Martin	

Property / unit type

Location in Qube: Core Modules > Property Management > Property or Unit > Property/Unit type

The property and unit types below are ones sync as default to Fixflo. Please let us know if you want any changes and adjustments to this.

- Block (property) types:

"residential", "offices", "shops", "car parking", "storage",
"houses", "apartments", "site", "block", "commercial", "industrial",
"office", "retail"

- Unit Types:

"flat", "apartment", "residential", "commercial", "house", "car space", "office"

The screenshot shows a form for creating or editing a property/unit type. The 'Property type' dropdown is highlighted with a red box and set to 'MIXED'. Other fields include:

Address:	Phoenix House
	Phoenix Place
	Islington
Town/City:	London
County:	
Country:	
Postcode:	EC2P 2DD
VAT elected:	<input checked="" type="checkbox"/>
Property type:	MIXED
Status:	LIVE
Area code:	S
Lifespan period:	n/a to n/a
Election date:	n/a
Tenure:	Freehold
Portal Suite:	-
IPD area:	-
LocalAuth	Islington Council
Water	South East Water

Tenant status and type

Core Modules > Property Management > Tenant

Tenant = Leaseholder in Fixflo.

- We will need the status and type of tenants that you would like synced over to Fixflo.
- By default we sync these statuses:

Tenant Types:

"individual tenant", "managed tenant", "head tenant", "receipts tenant", "non-resident tenant", "residuals tenant", "individual leaseholder", "managed leaseholder", "sub-lessee", "multi-party lease", "sharer"

Tenant Statuses:

"current", "previous", "vacating", "in dispute"

Unit:	001-002-001	Phoenix House - Apartment 1
Property:		
Reference:	001-002-001A	
Tenant name:	Mr Ashley Lewis	
Status:	Previous	Non Current Status
Parent tenant:		Type: Individual tenant
Base currency:	GBP	
Address:	Apartment 1	
	Phoenix House	
	Phoenix Place	
Town/City:	Islington	
County:		
Country:		
Postcode:	EC2P 2DD	
Dear:	Mr Lewis	
Yours:	sincerely	
Telephone:	020 3504 4928	Alt.Telephone:
Mobile:		Fax:
Email 1:	trainer@training.com	
Email 2:		

Order type