

PropertyIQ™

Quick guide to adding a building – New South Wales

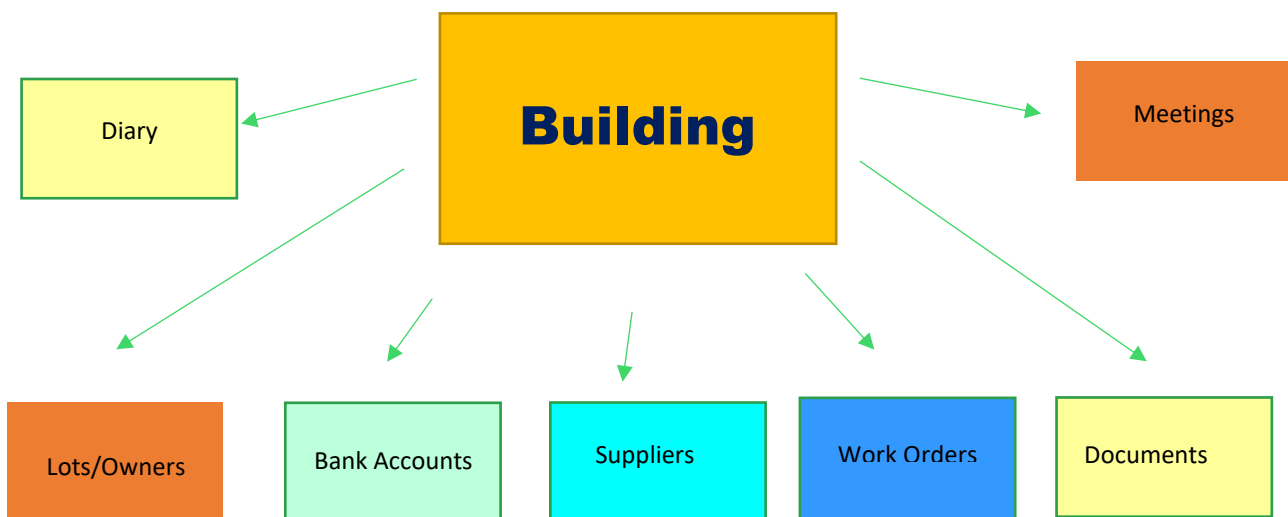
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INTRODUCTION TO BUILDINGS

Reminder – we recommend that you always use Chrome as your browser for PropertyIQ

The buildings card stores all the information relating to each Building. The buildings area interacts with all areas of PropertyIQ.



This is where you can add, view and edit:

Settings – bank account, tax status, interest and discounting rules and important contacts

Dates – Important dates such as AGM and financial year

Charges – your fixed and variable management fees.

Info – Committee members, tradespeople, Insurance, Investment accounts, internal committees.

Financials – balances and owner positions, create and manage contribution schedules

Budget – planning and implementing the expenditure and income for a building

Notes – here you can add, edit and view any notes relating to the building

Documents – view, email and print all documents relating to the building

Registers – keep track of assets, lot authorisations, contracts and funding proposals

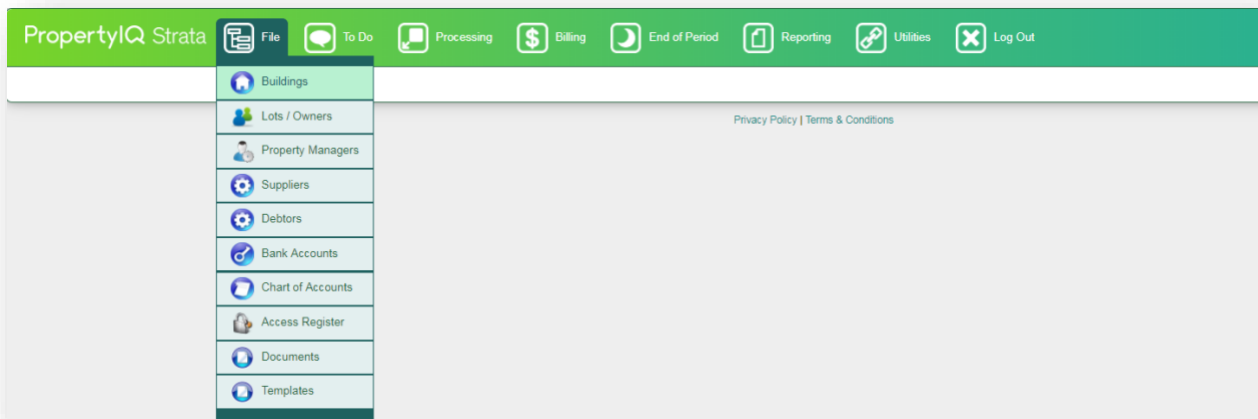
Alerts – create and manage alerts for important events

Work Orders – view and edit work orders for the building

Log of Changes – view a change log for the building

ADDING A NEW BUILDING

To add a new building go to  and select Buildings



Click on *+Add* at the bottom of the screen

PropertyIQ Strata File To Do Processing Billing End of Period Reporting Utilities Log Out Current Logged In as Role: Super Administrator 0.156.0 26/7/2018

Buildings

S/Plan	Building Name	Street No	Street Name	Suburb	State	Post Code	Manager	Lots	Folio
<input type="checkbox"/>									
<input type="checkbox"/>	1	The Bachelor Pad	1-8	Hollywood Drive	MURWILLUMBAH	WA	2656	Rohit Sachdeva	11
<input type="checkbox"/>	4	Penrith Plaza	1	Smith	BAYBROOK	NSW	2750	Anne Fliva	2
<input type="checkbox"/>	5	Wayne Tower	3	East Avenue	GLENELG	QLD	6000	Rohit Sachdeva	5
<input type="checkbox"/>	6	Belair Apartments	1	Vulcan Drive	WATSON	NSW	2602	Ashley Jones	3
<input type="checkbox"/>	7	Moonee Towers	1-3	Lennox Street	MOONEE PONDS	NSW	3039	Jack Dobinson	1
<input type="checkbox"/>	8	KCs	15	Fifth Avenue	BELLAVUE HILLS	NSW	2023	Ashley Jones	1
<input type="checkbox"/>	9	The Terrace	235	St Georges Tce	PERTH	WA	6000	Stephanie Schipp	3
<input type="checkbox"/>	10	'Tempo'	13	Mitroian Drive	CROYDON	NSW	3072	Training Manager	9
<input type="checkbox"/>	11	The Plaza	252	David Street	KEILOR	QLD	3225	Ashley Jones	2
<input type="checkbox"/>	12	Riverside		Roma Road	HAMILTON	QLD		Jack Dobinson	54
<input type="checkbox"/>	13	Open Lane	1 - 3	Open Lane	BRISBANE	NSW		Jack Dobinson	6
<input type="checkbox"/>	14	Smith Street Building	1	Smith Street	BRISBANE	SA	4000	Ashley Jones	5
<input type="checkbox"/>	15	Paper Street House	537	Paper Street	BARDFORD	QLD	4000	Ashley Jones	5
<input type="checkbox"/>	16	Belyando	27	Scarborough Parade	BRISBANE	QLD	4000	Jack Dobinson	9
<input type="checkbox"/>	17	Isaacs	235	1st Ave	INDOORAPILLY	QLD	4112	Ashley Jones	4
<input type="checkbox"/>	18	Opal House	12	Opal Ridge Drive	BRISBANE	QLD	4000	Jack Dobinson	0
<input type="checkbox"/>	19		1	George Street	BRISBANE	QLD		Jack Dobinson	4
<input type="checkbox"/>	20	Malvern Grove	44	Malvern Parade	THE POST OFFICE	NSW		Rohit Sachdeva	8

0 selected

Show Legend Export Add View

BUILDING DETAILS

1. You should first select the state from the dropdown list first. This determines other available fields and settings that are specific to the state
2. Enter the strata plan number
3. Use the dropdown list to select the strata manager from the list of users
4. Use the dropdown list to select the folio (if you use folios in your company)
5. If you have selected a folio, you can remove it by clicking on the trash symbol
6. Use the dropdown list to select the building type from the dropdown list. The building types available are specific to NSW. Your selection affects the terminology and layout of your levy notices.
7. Select the building sub-type – commercial or residential – from the dropdown list
8. Enter a building class (optional)
9. Enter the total units of entitlement for the building (pre-set by the strata plan)
10. The *active* tick will be ticked by default. You can untick to make the building inactive if you no longer manage it
11. *Debt collection* will be ticked by default. Leave this ticked if you want this Building to be included when you process a due notice run that includes arrears, final or legal notices. Only untick this if the building has instructed that they don't want you to conduct debt collection for them.
12. Tick *all inclusive fees* if your fees for managing this building are all inclusive. For example, if you don't charge extra for phone calls or photocopying. This is just a reminder for you not to charge extra fees, it doesn't actually affect your charges or fee schedules.
13. If *debt collection* is ticked, you can also tick here to include a payment plan statement that will show whenever Arrears, Final or Legal notices are sent. A payment plan statement must be set up in your application settings and you must have the correct merge field set up on your notice template for this to work. See the manuals "Settings" and "Templates" for full details
14. Type the street number here
15. Type the street name here
16. Type the suburb here
17. Type a building name here (optional)
18. Type the postcode here.

Building

S/Plan* 283423

Manager* Training Manager

Folio* GroupT

Building Type* Strata

Building Sub Type* Residential

Building Class Townhouses

Total UOE* 40

Active ☒

Debt Collection ☒

All Inclusive Fees ☒

Payment Plan ☒

Address

Street No 29-31

Street Name* Mile End Road

Address 2

Suburb ROUSE HILL

Building Name Morada Place

State* NSW

PI/Code 2155

Settings | Dates | Charges | Info | Financials | Budget | Notes | Documents | Registers | Alerts | Work Orders | Insurance Claims | Log of Changes

Bank Account	Owner Interest
Tax Settings	Levy Discount
Original Proprietor	Parking
Auditor	Onsite Manager
	Caretaker

Save Cancel



You need to complete all the fields with an asterisk on the main screen and at least the financial year, levy start year and levy frequency in the Dates Tab and attach a bank account to the Building before you can save the Building. (except the folio field) All other information can be added later.

SETTINGS TAB – BANK ACCOUNT

You must attach a bank account to the building before you can save a building

1. From the *Settings* tab, click on the little white arrow on the *Bank Account* accordion to open it
2. Click on the search Icon in the account box to search for a bank account to attach
3. Type some key letters to refine your search and find the bank account you are looking for
4. Click on the bank account you want to highlight it and then double click *or*
5. Click on the *Select* button at the bottom right of the screen

For detailed instructions on how to add a bank account, see the manual – “Bank accounts”

FINANCIAL YEAR AND LEVY YEAR ENTRY - DATES TAB

You must enter at least the financial year start date and levy year start date before you can save a building.

1. Enter the financial year start date here
2. Enter the next AGM date here
3. Enter the first AGM date here
4. Enter the last AGM date here
5. Enter the levy year start date here
6. Enter the levy frequency here
7. If the building has pre-issue levies, select the number you are going to issue here
8. Enter the date the strata plan was registered here
9. Enter the date the building was built here
10. Enter the date you acquired the management here
11. If the management is resigned (lost) in the future, enter the date here

Building

S/Plan* 283423

Manager* Training Manager

Folio* NSW BRANCH

Building Type* Strata

Building Sub Type* Residential

Building Class Townhouses

Total UOE* 45

Active ☒

Debt Collection ☒

All Inclusive Fees ☐

Payment Plan ☐

Address

Street No 29-31 Street Name* Mile End Road

Address 2

Suburb ROUSE HILL State* NSW

Building Name Morada Place P/Code 2155

Formal Tenancy 33%

Settings

Dates

Charges

Info

Financials

Budget

Notes

Documents

Registers

Alerts

Work Orders

Insurance Claims

Emails

Log of Changes

Fin Year* 01/07/2017

Next AGM 12/07/2018

First AGM 14/07/2015

Last AGM 31/07/2016

Levy Year Start* 01/08/2017

Levy Frequency* Quarterly

Preissue None

Date Registered 05/05/2015

Date Built 01/10/2014

Date Acquired 31/07/2017

Date Resigned

Custom Dates

Description

Date

Type

By Laws to be

31/10/2017

COMMITTEE

+ Add Custom Date

Remove

Save

Cancel

FORMAL TENANCY PERCENTAGE

If any tenants have been entered on a lot owner card and ticked as the *formal tenant*, then the percentage of lots with a formal tenant shows here. If you have entered any text in the field *Accessory Unit* on the lot owner card, then that lot will be ignored for the purpose of calculating the formal tenancy percentage.

Building

S/Plan*

283423

Manager*

Training Manager

Folio*

NSW BRANCH

Building Type*

Strata

Building Sub Type*

Residential

Building Class

Townhouses

Total UOE*

45

Active

☒

All Inclusive Fees

☐

Debt Collection

☒

Payment Plan

☐

Address

Street No

29-31

Street Name*

Mile End Road

Address 2

Suburb

ROUSE HILL

State*

NSW

Building Name

Morada Place

PI Code

2155

Formal Tenancy 67%

Settings

Dates

Charges

Info

Financials

Budget

Notes

Documents

Registers

Alerts

Work Orders

Insurance Claims

Emails

Log of Changes

Bank Account

Owner Interest

Tax Settings

Levy Discount

Original Proprietor

Parking

Auditor

Onsite Manager

Caretaker

Opening Balances

Info Certificates

Schedules

Financial Reports

Edit

Done

For detailed information on the other tabs, please refer to the other “Buildings” manuals -

Settings
 Dates
 Charges
 Info
 Financials
 Budget
 Notes
 Documents
 Registers
 Alerts
 Opening Balances