

PropertyIQ™

Buildings – Dates tab

The Dates tab is where you enter the important dates for the building

1. Enter the first date of the current financial year.
2. Enter the date of the next AGM
3. Enter the date of the first AGM (if known)
4. Enter the date of the last AGM
5. Enter the levy year start date.
6. Use the dropdown list to select how frequently you need to generate levy instalments for this building
7. Select the number of Pre-Issues – (also called Interim Levies) you want to allow. Pre-issues allow you to create the specified number of levies into the next financial year. For example, if your levy year runs from 30 April 2020 to 29 April 2021 - your AGM might not be held until May 2021. You could create pre-issue levies to cover the period just after your 2021 AGM until the budget process is completed and new levies for 2021-2022 can be created.
8. Enter the date the building was registered
9. Enter the date the building was built, if known.
10. Enter the date you acquired management of the building here
11. If you lose the management later, you can record the date it was resigned here
12. Click on the *+Add Custom Date* button to add a custom date. You can add as many custom dates as you want.
13. Enter a description for the custom date
14. Enter the date the item is due
15. Enter a type for the custom date
16. You can remove an existing custom date by clicking on the Remove Button
17. Click *Save* to save the dates you have entered.



The AGM date and any custom dates you create will appear in the diary and by default, will belong to the strata manager for the building.

Building

S/Plan*283423

Manager*Training Manager

Folio*NSW

Building Type*Building Management Committee

Building Sub Type*Residential

Building ClassTownhouses

Total UOE*40

Active☒

Debt Collection☒

All Inclusive Fees☐

Payment Plan☐

Address

Street No29-31

Street Name*Mile End Road

Address 2

SuburbROUSE HILL

State*NSW

Building NameMorada Place

P/Code2155

Settings

Dates

Charges

Info

Financials

Budget

Notes

Documents

Registers

Alerts

Work Orders

Insurance Claims

Log of Changes

Fin Year*09/07/2017

Next AGM12/07/2018

First AGM14/07/2015

Last AGM13/07/2016

Levy Year Start*26/07/2016

Levy Frequency*Quarterly

PreissueNone

Date Registered05/05/2015

Date Built01/10/2014

Date Acquired31/07/2017

Date Resigned

Custom Dates

DescriptionBy Laws to be

Date31/10/2017

TypeCOMMITTEE

Remove

Add Custom Date

Save

Cancel



You can save the building without all tabs being complete, but you will not be able to save it without entering a financial year start date, levy year start date, levy frequency and attaching a bank account