



Buildings – Info tab

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INFO TAB

The Info tab holds all the information about committee members, preferred tradespeople, insurance policies, investment accounts and precinct/community associations or other entities that this building is a part of.

COMMITTEE

1. This is where you record all the members of the building's committee or council. Click on the white arrow to open
2. The screen defaults to view active committee members but you can click on the tabs to switch your view to all, appointed, active or resigned
3. The committee member's details show here
4. Click in the boxes to select individual committee members or click on the top line to select them all
5. You can record any committee spending limits here. This does not affect any other part of PropertyIQ, it is just for your information
6. Once you have selected at least one committee member on the screen, the email button will no longer be greyed out and you can click to email the selected members. Clicking on the *Email* button opens your email program and automatically inputs the selected members as recipients. NOTE: Emails sent by this method are not saved in PropertyIQ and committee member will be able to see each other's email address.
7. Once you have selected at least one committee member on the screen, the *Merge Committee Member* button will no longer be greyed out and you can click to email the selected members. See below for mail merging instructions

8. Once you have selected at least one committee member on the screen, the *Mailing Labels* button will no longer be greyed out and you can click to create mailing labels for the selected members. This creates a job in the mailing labels centre for you to print later. For full details on mailing labels, see the manual “Mailing Labels”
9. If you have SMS enabled on your account and you have selected at least one committee member on the screen, the *Bulk SMS* button will no longer be greyed out and you can click to bulk SMS the selected members.
10. Click the *+Add* button to add a new committee member. See instruction below
11. Click *View* to view an individual committee member’s card

Building

C.T.S.*

270976

Manager*

Anne Fluva

Folio*

QLD Branch

Building Type*

Strata

Building Sub Type*

Residential

Building Class

Module

Accommodation

Type

Mixed

Total UOE*

200

Total Int Ent*

200

Active

☒

All Inclusive Fees

☐

Debt Collection

☒

Payment Plan

☐

Address

Street No

63

Street Name*

Cavill Avenue

Address 2

Suburb

SURFERS PARADISE

State*

QLD

Building Name

Moorings on Cavill

P/Code

4217

Plan

270976

Parish

SURFERS PARADISE

County

Settings

Dates

Charges

Info

Financials

Budget

Notes

Documents

Registers

Alerts

Work Orders

Insurance Claims

Log of Changes

Committee

All

Appointed

Active

Resigned

	Position	Name	Lot	Appointed	Resigned	Status	Contact	Email	Type
<input checked="" type="checkbox"/>		Rocco Silvester	1	1/1/2017		Active	0414 332 332	fayeg@propertyiq.com.au	
<input checked="" type="checkbox"/>		Celia Chan	4	1/6/2017		Active		mystratacustomers@gmail.com	
<input checked="" type="checkbox"/>	Secretary	Costa Gianapolous	5	2/8/2017		Active	0415453 456	costagian@gmail.com	
<input type="checkbox"/>	Secretary	Celia Chan	4	21/8/2017		Active		mystratacustomers@gmail.com	

Spending Limits

Committee Expenditure

\$500.00

Major Spending

\$2,000.00

Date of Resolution

06/06/2017

Email

Merge Committee Letter

Add Mailing Labels

Bulk SMS

+ Add

View

Tradespeople

Insurance

Investment Accounts

Community Association / Precinct Association / Building Management Committee

Opening Balances

Schedules

Financial Reports


Edit

Done

MAIL MERGING TO COMMITTEE MEMBERS

1. Click *Merge Committee Letter* to get started
2. Click on the search icon to find the template you want to merge to
3. Committee members with email selected as their delivery method will be emailed – Enter an email subject line here
4. Tick here if you want to override committee member delivery methods and create a PDF that you can print and post for all the selected committee members.
5. The name of each recipient shows here, and their delivery method
6. Click on the attachments accordion to open it
7. Click here to add a document
8. Click close to exit the mail merge process

Custom Template Merge

Current Selected Template: 

Template Type: Existing Template

Email Subject: Committee Appointment

Override Email To Post ☐

Template will be sent to 3 recipients

S/Plan	Lot	Name	Delivery
270976	4	Celia Chan	Email
270976	5	Costa Gianapolous	Email
270976	4	Celia Chan	Email

Attachments

Name	Date	Size

+ Add Document

- Remove Document

Customise

Preview

Generate

Close

Street Name* Cavill Avenue

RFERS PARADISE

State* QLD

ings on Cavill

P/Code 4217

976

Parish SURFERS PARADISE

County

Documents

Registers

Alerts

Work Orders

Insurance Claims

Log of Changes

	Lot	Appointed	Resigned	Status	Contact	Email	Type
	1	1/1/2017		Active	0414 332 332	fayeg@propertyiq.com.au	
	4	1/6/2017		Active		mystratacustomers@gmail.com	
	5	2/8/2017		Active	0415453 456	costagian@gmail.com	
	5	21/8/2017		Active		mystratacustomers@gmail.com	

Email

Merge Committee Letter

Add Mailing Labels

Bulk SMS

+ Add

View

Spending Limits

Committee Expenditure \$500.00

Major Spending \$2,000.00

Date of Resolution 06/06/2017

Tradespeople

Insurance

Investment Accounts

Community Association / Precinct Association / Building Management Committee

Opening Balances

Schedules

Financial Reports

Edit

Done

ADDING A DOCUMENT TO THE MAIL MERGE

1. Select *Add Documents*
2. The documents show on the screen
3. Click on the document, to highlight it, and then double click to select it
4. Click on the *Document Entry* button to add a document that is on your computer, but not saved in PropertyIQ. This will also add the document to the building's document card
5. You can also remove a document that you have previously added, by clicking on the *Remove Document* button

The screenshot displays the 'Custom Template Merge' window. On the left, the 'Current Selected Template' is 'Existing Template' with the subject 'Committee Appointment'. Below this is a table of recipients:

S/Plan	Lot	Name
270976	4	Celia Chan
270976	5	Costa Gianapoulos
270976	4	Celia Chan

Below the recipients table is the 'Attachments' section with a table:

Name	Date
Account Ledger Report.pdf	28/8/...
Storage area keys.PNG	25/8/...
Debtor Invoice 2017-08-25.pdf	25/8/...
Financial Report Final 25-08-2016 to 24-08-...	25/8/...
Financial Report Final 25-08-2016 to 24-08-...	25/8/...
The Bachelor Pad 2017 Proposed Budget ...	25/8/...
Detailed Attendance Report.pdf	25/8/...
Attendance Report.pdf	25/8/...

On the right, the 'Documents' table lists various documents for different buildings. A purple arrow points from the 'Add Document' button (1) to the 'Attachments' table (2). Another purple arrow points from the 'Remove Document' button (5) to the 'Attachments' table (2). A third purple arrow points from the 'Document Entry' button (4) to the 'Documents' table. A fourth purple arrow points from the 'Account Ledger Report.pdf' document (3) to the 'Attachments' table.

SENDING A BULK SMS TO COMMITTEE MEMBERS

If you subscribe to the SMS service, you can bulk SMS Committee members

1. Select the committee members you want to SMS and click on the *Bulk SMS* button
2. The recipients and their mobile numbers show here
3. Enter your message here.
4. Your standard signature is set up in the settings menu - SMS tab. For more detail, see the manual "SMS"
5. The character count shows here
6. The estimated cost per message shows here. Messages are charged in 160 character blocks. If your message is up to 160 characters, it will count as one message for billing purposes, if more than 160 it will count as two and so on.
7. The number of messages per recipient shows here. As this message is more than 160 characters, two messages per recipient will be charged.
8. The total estimated cost of the bulk message shows here
9. Click *Send Bulk Message* when you are ready to send. The SMS will be recorded on each committee member's card
10. Click *Close* to exit the bulk SMS

Building

S/Plan* 888777
 Manager* Anne Fluva
 Folio* Support Team Training
 Building Type* Strata
 Building Sub Type* Residential
 Building Class
 Total UOE* 220
 Active ☒ All Inclusive Fees ☐
 Debt Collection ☒ Payment Plan ☒

Settings Dates Charges Info Financials

Committee

Position	Name	Lot	Appointed	Resigned	Active	Mobile	Email	Type
<input checked="" type="checkbox"/> Chairperson	Franca Swanden	1	1/7/2016		Active	0423 324 343	fayeg@propertyiq.com.au	Rep
<input checked="" type="checkbox"/> Secretary	Sally Bennett	4	1/7/2016		Active	0432 343 434	sallybennett@gmail.com	Rep
<input checked="" type="checkbox"/> Treasurer	Bailey Brown	8	1/7/2016		Active	0412 544 344	mystratacustomers@gmail.com	Rep
<input checked="" type="checkbox"/> Chairperson	Carolyn Samuels	12	8/11/2017		Active	0422 343 434	cs@gmail.com	
<input checked="" type="checkbox"/>	Ellery Borenson	3	19/12/2017		Active	0414 223 554	elleryb@gmail.com	
<input checked="" type="checkbox"/> Manager	Nicole Bauer	30	15/1/2018		Active	0422 894 764		
<input checked="" type="checkbox"/> Chairperson	Carolyn Samuels	12	25/7/2018		Active	0422 343 434		

Spending Limits
 Committee Expenditure \$200.00
 Major Spending \$10,000.00
 Date of Resolution 01/11/2017

Send Bulk SMS

Message will be sent to 8 recipients

Name	Mobile
Franca Swanden	0423 324 343
Sally Bennett	0432 343 434
Bailey Brown	0412 544 344
Carolyn Samuels	0422 343 434
Ellery Borenson	0414 223 554

Message* Hi everyone, reminder that the strata committee meeting is on tonight at 7 pm in our offices - 224 Pacific Highway, Vaucluse. Please email me if you cant attend.

+ Signature My Strata Co

Length: 174 # Of Messages Per Recipient: 2
 Estimated Cost Per Recipient: \$0.40 Total Estimated Cost: \$3.20

Send Bulk Message Close

Email Merge Committee Letter Add Mailing Labels Bulk SMS + Add View

ADDING COMMITTEE MEMBERS

Click **+Add** to add committee members. You can add lots/owners from here, but you would normally do this in the lots/owners area and create all the lots and owners before this step.

1. Click on the search icon to find a lot owner.
2. All lot owners for that building show here. Click on the lot owner you want to add to the committee, to highlight them then double click to select them

Committee Member

Let: [Search Icon] View Lot

Name* [Field] Salutation [Field] Appointed* [Field]
 Position [Field] Resignation [Field]
 Nominater* [Field] Financial Reports Recipient* [Field]
 Schedule [Field] Work Order Recipient* [Field]
 Rep [Field] Sub Rep [Field] Insurance Claim Recipient* [Field]
 External Approver [Field]
 Address [Field] Suburb [Field] State [Field] Post Code [Field]
 Contact Details [Field] Home [Field] Work [Field] Email [Field] Mobile [Field]
 Delivery Method [Field] Note [Field]

Lots


S/Plan	Lot	Unit	CRN	Owner	Street	Street Name	Building Name	Strata Manager Name	Com. M.	Deliver	Other I.
2709	1	1	000000	Rocco Silvestro	83	Cavill Avenue	Moorigins on Cavill	Anne Fluva	Owner	Email	
2709	2	2	000000	Maria Stelino	83	Cavill Avenue	Moorigins on Cavill	Anne Fluva	Owner	Email	
2709	3	3	000000	Boltech Pty Ltd	83	Cavill Avenue	Moorigins on Cavill	Anne Fluva	Owner	Post	
2709	4	4	000000	Celia Chan	83	Cavill Avenue	Moorigins on Cavill	Anne Fluva	Owner	Post	
2709	5	5	000000	Costa Gianapolous	83	Cavill Avenue	Moorigins on Cavill	Anne Fluva	Owner	Post	
2709	6	6	000000	Costa Gianapolous	83	Cavill Avenue	Moorigins on Cavill	Anne Fluva	Owner	Post	
2709	7	7	000000	Costa Gianapolous	83	Cavill Avenue	Moorigins on Cavill	Anne Fluva	Owner	Post	
2709	8	8	000000	Costa Gianapolous	83	Cavill Avenue	Moorigins on Cavill	Anne Fluva	Owner	Post	

Show Legend Import Merge + Add View Edit Select Close

Export + Add View



If the committee/council member is not a lot owner, skip this step and enter their details directly onto the committee/council member's card

1. If you have selected the lot owner, their details show here, select  to view the card *or*
2. If you have selected a lot owner, you can view the lot card here
3. If you sync with lot owner, any changes you make to the lot card will update the committee card automatically
4. The lot owners name from the lot card shows here.
5. The salutation from the lot card shows here.
6. Select their committee position from the dropdown list
7. Use the calendar to select the date they were appointed to the committee
8. Use the search icon to select the lot owner that nominated the committee member here
9. If the committee member resigns from the committee, use the calendar to select their resignation date
10. If this is a multi-schedule building and this member is a committee member for a single schedule, select the schedule here
11. Select here if they are a representative or a sub representative for the lot owner
12. Select here if this person has the authority to approve supplier payments that need committee/council approval. If this is ticked, when you are processing supplier transactions and you select that the invoice requires external approval, they will automatically be emailed an invoice approval request.
13. Select here if this member receives a copy of financial documents when generating in bulk from the Reporting menu
14. Select here if this member receives a copy of work orders when you send them to suppliers
15. Select here if this member receives a copy of insurance claims when you send them to insurers
16. If you don't sync with the lot owner information, you can update any of the address details for this person here
17. If you have synced with the lot owner, the details from their lot card show here. If not, you can update any of the contact details for this person here
18. Tick their preferred delivery method for committee related correspondence (this can be different to their preferred method of delivery for lot owner correspondence)
19. You can record notes here that relate to the person's committee member role.
20. *Save*

Committee Member

1

2

3

Lot:

4/4 Celia Chan

View Lot

Sync With Lot Owner

Name*

Celia Chan

4

Salutation

Ms

5

Position

Secretary

6

Appointed*

10/03/2020

7

Nominator

2/2 Maria Stellino

8

Resignation

9

Schedule

Moorings Standard C

10

Financial Reports Recipient

☒

13

Rep

☐

11

Work Order Recipient

☐

14

Sub Rep

☐

12

Insurance Claim Recipient

☒

15

External Approver

☒

Address

Address

Unit 4, 63 Cavill Avenue

16

Suburb

SURFERS PARADISE

State

QLD

Post Code

4217

Contact Details

Home

17

Fax

Work

Mobile

0421 233 233

Email*

mystratacustomers@g

Delivery Method

Email

☒

18

Post

☐

Note

19

20

Save

Cancel

If you have SMS enabled on your account, you can SMS a single committee member from their committee card. Select *Send SMS*

Committee Member

Lot: 4/4 Celia Chan

View Lot

Sync With Lot Owner

Name* Celia Chan

Salutation Ms

Position Member

Appointed* 27/06/2018

Nominator

Resignation

Schedule

Financial Reports Recipient

Rep

Work Order Recipient

Sub Rep

Insurance Claim Recipient

External Approver

Address

Address Unit 4, 63 Cavill Avenue

Suburb SURFERS PARADISE

State QLD

Post Code 4217

Contact Details

Home

Fax

Work

Mobile 0414 323 434

Email* mystratacustomers@g

Delivery Method

Email

Post

Note

SMS

To	Message	Status	Sent	Created By

Send SMS

EditDone

1. The committee member needs to have a valid mobile number
2. Enter your SMS text
3. There's an automatic signature applied to each text that is configured in your Settings>SMS area
4. The number of characters in your message shows here. SMS is charged in blocks of 160 characters. If your message exceeds 160 characters but is less than 320 characters, you'll be charged for 2 messages and so on. Some special characters count as two characters.
5. The number of messages shows here
6. The estimated total cost of the message shows here
7. *Send*

The screenshot shows a 'Send SMS' dialog box with the following elements and numbered callouts:

- 1**: Points to the 'Mobile' field containing '0414 323 434'.
- 2**: Points to the 'Message' text area containing 'Hi Celia, pls call me urgently!'.
- 3**: Points to the bottom of the 'Message' text area.
- 4**: Points to the '+ Signature' field containing 'My Co'.
- 5**: Points to the 'Messages: 1' label.
- 6**: Points to the 'Estimated Message Cost: \$0.06' label.
- 7**: Points to the 'Send Message' button.

Other visible text includes 'Name: Celia Chan', 'Send to: [checkmark]', 'Length: 43', and a 'Close' button.



You can record the building's preferred tradespeople here. You will still be able to select any tradespeople you want when creating a work order, as this area is just for your information.

1. Make sure you are *not* in edit mode on the building card and click here to get started
2. Enter some key letters to search for the tradesperson you want
3. *Select* to add them

You can remove a preferred tradesperson

1. Highlight the tradesperson you want to remove
2. Click *Remove Tradesperson* to remove them from the list. This will not remove their supplier record from PropertyIQ.

You can print a list of all preferred tradespeople for the building by clicking on the *Print* button.

INSURANCE

You can record all insurance policies relating to the building here. Recording your insurance policies here creates entries in your diary so you won't miss any policies expiring. This information is also utilised when you process an insurance claim. For full details about insurance claims, see the manual "Insurance Claims"

1. Any existing insurance policies will show here. Click on the policy to highlight it, and then double click to open it
2. You can enter the latest insurance valuation amount and the date of the latest Insurance Valuation here
3. You can add insurance valuer suppliers here - click on the search icon to search for a supplier.
4. **+Add** button to add a new insurance policy or
5. **View** button to view an insurance policy that you have already highlighted on the screen

Building

S/Corp* 4345
Manager* Anne Fluva
Folio*
Building Type* Strata
Building Sub Type* Residential
Building Class
Total UOE* 120
Active ☒ **All Inclusive Fees** ☐
Debt Collection ☒ **Payment Plan** ☐

Address
Street No 2 **Street Name*** Dorinda Place
Address 2
Suburb PORT AUGUSTA **State*** SA
Building Name Dorinda Waters **P/Code** 5232

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

Committee
Tradespeople
Insurance

Policy Number	Insurance Company	Type	Renewal Date	Premium
43543555	CGU Insurance		12/3/2017	\$5,000.00

Insurance Valuation \$3,000,000.00 Valuer ABC Valuers
Valuation Date 01/05/2017

Valuer Details
Name ABC Valuers **Phone** 102 76676777
Address 101 High Street **Phone** 202 76676888
SYDNEY NSW 2000 **Mobile** 042876543
Email john@abcvaluer.com

+ Add View

Investment Accounts
Community Association / Precinct Association / Building Management Committee

Save Cancel

ADDING AN INSURANCE VALUER

1. Use the search icon to search for a supplier
2. Enter some key letters in any of the empty boxes on the top line to refine your search
3. Click on the supplier you want to highlight them and then double click to select
4. You can also add, view, edit and select suppliers here. For full details, see the Manual "Suppliers Screen"

The screenshot displays the PropertyIQ software interface. On the left, the 'Building' form is open, showing details for 'C.T.S.' and 'Lea Mac'. The 'Insurance' section is highlighted, showing a table with columns for Policy Number, Insurance Company, and Type. A purple arrow points from this section to the 'Suppliers' window on the right.

The 'Suppliers' window is titled 'Suppliers' and contains a table with columns: Supplier Name, Supplier Co., Balance, Type, Suburb, Phone, Mobile, ABN, and Compla. The table lists several suppliers, including 'Dean Scarce Electrical PL', 'Adam Plumber', and 'ABC Valuers'. A search bar is located at the top of the table, and a search icon is highlighted with a blue circle (1).

Below the table, there are buttons for '+ Add', '+ View', '+ Edit', '+ Select', and '+ Close'. The '+ Add' button is highlighted with a blue circle (4).

At the bottom of the 'Suppliers' window, there is a section for 'Insurance Valuation' with a value of '\$3,000,000.00' and a date of '01/04/2017'. Below this, there is a section for 'Valuer Details' with fields for Name, Address, Phone, Mobile, and Email. The 'Valuer Details' section is highlighted with a blue circle (3).

ADDING AN INSURANCE POLICY

+Add to get started

The screenshot shows the 'Building' software interface. The top section contains fields for 'S/Corp' (4345), 'Manager' (Anne Flava), 'Address' (Street No: 2, Street Name: Dorinda Place), 'Suburb' (PORT AUGUSTA), 'State' (SA), and 'Building Name' (Dorinda Waters). Below this is a table with columns: Policy Number, Insurance Company, Type, Renewal Date, and Premium. A single row is visible with Policy Number 43543555, Insurance Company OGU Insurance, Type, Renewal Date 12/3/2017, and Premium \$5,000.00. At the bottom, there is a section for 'Insurance Valuation' with fields for 'Insurance Valuation' (\$3,000,000.00), 'Valuation Date' (01/05/2017), and 'Value' (ABC Valuers). To the right of this section is a '+ Add' button highlighted with a red box, and a 'View' button. Below the '+ Add' button is a form for 'Value Details' with fields for Name, Address, Phone, Mobile, and Email.

1. Enter the policy number here
2. If you have an insurance company contact, enter their name here
3. Enter the start date and end dates of the policy here
4. Enter the date you want to manage the renewal here – enter this well ahead of the actual expiry as this creates a diary reminder for the strata manager and gives you time to ensure the policy doesn't expire
5. The policy is active by default, but you can inactivate it if you need to
6. Use the search icon to search for an insurer.
7. Click on an insurer name to highlight them then double click to select them
8. **+Add** button to add a new Insurer.
9. Once you have highlighted an Insurer on the screen, **View** to view their details
10. Once you have highlighted an Insurer on the screen, **Edit** to edit their details
11. Click on an insurer name and then **Select** to attach that insurer to the policy



When adding an insurer, make sure you enter an email address in the claims email section so insurance claims can be emailed to them.

Insurance Policy

Insurer Details

Policy Number

4345

Period From

15/08/2018

To

14/08/2019

Contact

Petina Fanech

Active

☒

Renewal Date

15/07/2018

Insurer

Insurance Company

Address

Suburb

State

Post Code

Broker

Insurance Broker

Address

Suburb

State

Post Code

Commission

Actual: \$0.00

Anticipated: \$0.00

Upload Policy Document

Select Policy Document

Insurance Policy Document:

Upload Endorsement

Select Endorsement

Endorsement Document:

Note:

Premium Details

Premium \$0.00

Date Paid

Amount Paid \$0.00

Coverage Details

Add Cover

Save

Cancel

Insurers

All

Active

InActive

Company Name	Phone 1	Phone 2	Fax	Note
CGU Insurance	02 8569 4521	02 5468 6589	02 5426 8596	
AAMI				
Suncorp	0396765678			Note found on the...
Insurance Alliance				
CHU	1300 361 263		1300 361 269	

Add

View

Edit

Select

Close

Add

View

BROKERS

Complete this section if you are using a broker.

1. Use the search icon to open the brokers list. This will show all existing brokers
2. Click to highlight a broker and click *View* to view that broker's details (or double click on the highlighted broker)
3. *+Add* to add a new broker
4. *View* to open and view an existing broker's details
5. *Edit* to edit the details of a broker
6. Click to highlight a broker and *Select* to add them to the insurance policy details (or double click on the highlighted broker)

Insurance Policy

Insurer Details

Policy Number: 4345 Period From: 15/08/2018 To: 14/08/2019

Contact: Petrina Fenech Renewal Date: 15/07/2018

Active: ☒

Insurer: CGU Insurance

Insurance Company: CGU Insurance

Address: 54 Cumberland Road

Suburb: RICHMOND

State: NSW

Post Code: 4526

Phone 1: 02 8569 4521

Phone 2: 02 5468 6589

Fax: 02 5426 8596

Email: 1_email@deadend.piq

Claims Dept Email: 1_claimsEmail@deadend.piq

Broker:

Insurance Broker

Address

Suburb

State

Post Code

Commission

Actual: \$0.00 Anticipated: \$0.00

Upload Policy Document Select Policy Document

Insurance Policy Document:

Upload Endorsement Select Endorsement

Endorsement Document:

Note:

Premium Details

Premium: \$0.00 Date Paid:

Amount Paid: \$0.00

Coverage Details

Add Cover

Save Cancel

Insurance Brokers

Broker Name	Phone 1	Phone 2	Fax	Note
Kinnane Insuranc...	03 5264 8569	03 9745 6523	03 9744 5264	
Bennaris Insuran...				
Regina Holsworthy	1300 878 989			Note found on the...
Body Corporate B...				
CRM Brokers	1300 880 494		9225 9943	
Direct Insurance ...				

+ Add View Edit Select Close

+ Add View

1. Enter your actual insurance commission here.
2. Enter your anticipated commission here.
3. Click here to upload a new policy document. See section below – [uploading insurance documents](#)
4. Click here to attach a document to this policy that is already in PropertyIQ. See section below – [uploading insurance documents](#)
5. Click here to upload a new Insurance endorsement document/policy alteration document. See section below – [uploading insurance documents](#)
6. Click here to attach an endorsement document to this policy that you have already attached to PropertyIQ. See section below – [uploading insurance documents](#)
7. Enter the amount of the premium shown on the insurance policy documents here
8. Enter the date the premium was paid here
9. Enter the actual amount of premium paid here e.g. if you are paying in monthly instalments you can enter the amounts here.
10. *Add Cover* to add details of cover

Insurance Policy

Insurer Details

Policy Number* 4335 Period From* 01/08/2018 To* 31/07/2019

Contact Lila Pertone Renewal Date 01/07/2018

Active ☒

Insurer: *CGU Insurance

Insurance Company CGU Insurance Phone 1 02 8569 4521

Address 54 Cumberland Road Phone 2 02 5468 6589

Suburb RICHMOND Fax 02 5426 8596

State NSW Email 1_email@deadend.piq

Post Code 4526 Claims Dept Email 1_claimsEmail@deadend.piq

Broker: Kinnane Insurance Broke

Insurance Broker Kinnane Insurance Brokers Phone 103 5264 8569

Address 762 The Plaza Phone 203 9745 6523

Address Line 2 Fax 03 9744 5264

Address Line 3 Email 1_email@deadend.piq

Suburb FITZROY

State VIC

Post Code 3256

Commission

Actual: \$500.00 Anticipated: \$500.00

Insurance Policy Document:

Endorsement Document:

Note:

Premium Details

Premium \$25,000.00 Date Paid 16/07/2018

Amount Paid \$25,000.00

Coverage Details

ADDING INSURANCE COVER

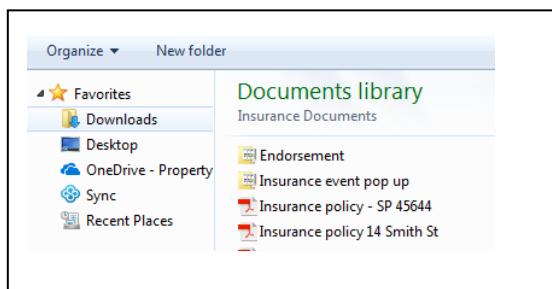
1. Choose the type of cover from the dropdown list
2. Enter the sum insured
3. Enter the amount of weekly premium payable (if paid weekly)
4. Enter the amount of excess payable if you make a claim
5. Enter any additional notes here
6. You can delete the cover here (This does not delete the whole policy, just this area of cover)
7. *Save*



You will not be able to process an insurance claim on a policy unless it has Building/Common property cover attached to it.

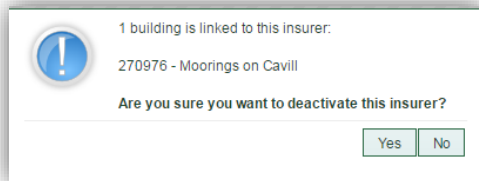
UPLOADING INSURANCE DOCUMENTS

Click on *upload policy documents* or *upload endorsement* to attach a document that is saved on your computer but not yet uploaded into PropertyIQ. If you have already added the policy document or endorsement document to PropertyIQ, you can click *select policy document* to search for it.

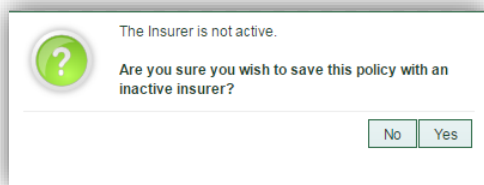


NOTE ABOUT INACTIVE INSURERS

You can deactivate insurers, but to prevent you from activating insurers that are already attached to an insurance policy, you will receive this warning if you try to deactivate an insurer that is attached to any policies.



If you edit and then try to save an Insurance policy that is attached to an inactive insurer, you will receive the following warning:



INVESTMENT ACCOUNTS

Some buildings have separate investment bank accounts, where they transfer some of the funds they don't need for immediate use to earn interest. C

lick on *+Add Investment Account* to get started

1. *+Add Investment Account*
2. To search for an existing investment account, enter some key letters here to refine your search
3. *+Add* to add a new investment account. The permission to add or edit bank accounts is usually restricted to the roles of Administrator and Accounts, but roles may be customised in your company.
4. To view or edit the details of an account, highlight the bank account you are looking for and click *View*
5. To select a bank account, highlight the account you want and then click *Select* (or double click on the account you want to select)

Building

S/Plan* 283423
Manager* Training Manager
Folio* NSW
Building Type* Strata
Building Sub Type* Residential
Building Class* Townhouses
Total UOE* 40
Active ☒ All Inclusive ☐

Address
Street No 29-31 Street Name* Mile End Road
Address 2
Suburb ROUSE HILL
Building Name Morada Place

Bank Accounts

Account No.	BSB	Account No.	Admin Balan.	Sinking Bala.	Balance
SP 16	182-222	784512963	\$2,515.00	\$0.00	\$2,515.00
Additional ac...	011-234	124576587	\$0.00	\$0.00	\$0.00
SP 73074 A...	182-222	434345444	\$20,000.00	\$30,000.00	\$50,000.00

Investment Accounts

Account Name	Account No.	BSB
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Buttons: + Add, View, Select, Close

COMMUNITY ASSOCIATIONS, PRECINCT ASSOCIATIONS AND BUILDING MANAGEMENT COMMITTEES

These are the organisations that sit above an individual strata scheme (and usually incorporate a number of strata schemes.) The information entered here merges onto an information certificate. The building you manage may have to pay levies to these organisations for items that affect the whole of the precinct, for example swimming pool expenses for a pool that services a number of strata plans.

1. Select the type of association/committee you want to enter
2. Enter the name of the association/committee
3. Enter the address of the association/committee
4. Enter the date the association/committee levies were determined
5. Enter the date levies due to the association/committee are paid to
6. Enter the amount of any arrears owed to the association/committee
7. Enter any amounts that have been paid in credit (advance) to the association/committee
8. You can enter the details of any levies due here
9. *Save*

The screenshot shows the 'Building' form with the 'Building Management Committee' sub-form open. Numbered callouts indicate the following steps:

1. Select the type of association/committee you want to enter (in the 'Community Association / Precinct Association / Building Management Committee' section).
2. Enter the name of the association/committee (Name of Building Management Committee*).
3. Enter the address of the association/committee (Address for service of notices).
4. Enter the date the association/committee levies were determined (Date Determined).
5. Enter the date levies due to the association/committee are paid to (Paid To).
6. Enter the amount of any arrears owed to the association/committee (Current Arrears).
7. Enter any amounts that have been paid in credit (advance) to the association/committee (Current Credit).
8. You can enter the details of any levies due here (in the table below).
9. *Save* (Save button).

This is a close-up of the 'Building Management Committee' form. It shows the following fields:

- Name of Building Management Committee*: Rouse Hill Residential Precinct
- Address for service of notices: PO Box 245 ROUSE HILL NSW 2155
- Date Determined: 01/10/2016
- Paid To: 01/03/2017
- Current Arrears: \$0.00
- Current Credit: \$400.00
- Last Updated: 30/01/2017 - 2:20 pm

The table for entering levy details is as follows:

Period From	Period To	Due Date	Admin	Capital Works
1/3/2017	1/6/2017	1/3/2017	\$5,000.00	\$3,000.00