PropertyIQ

Buildings – Info tab

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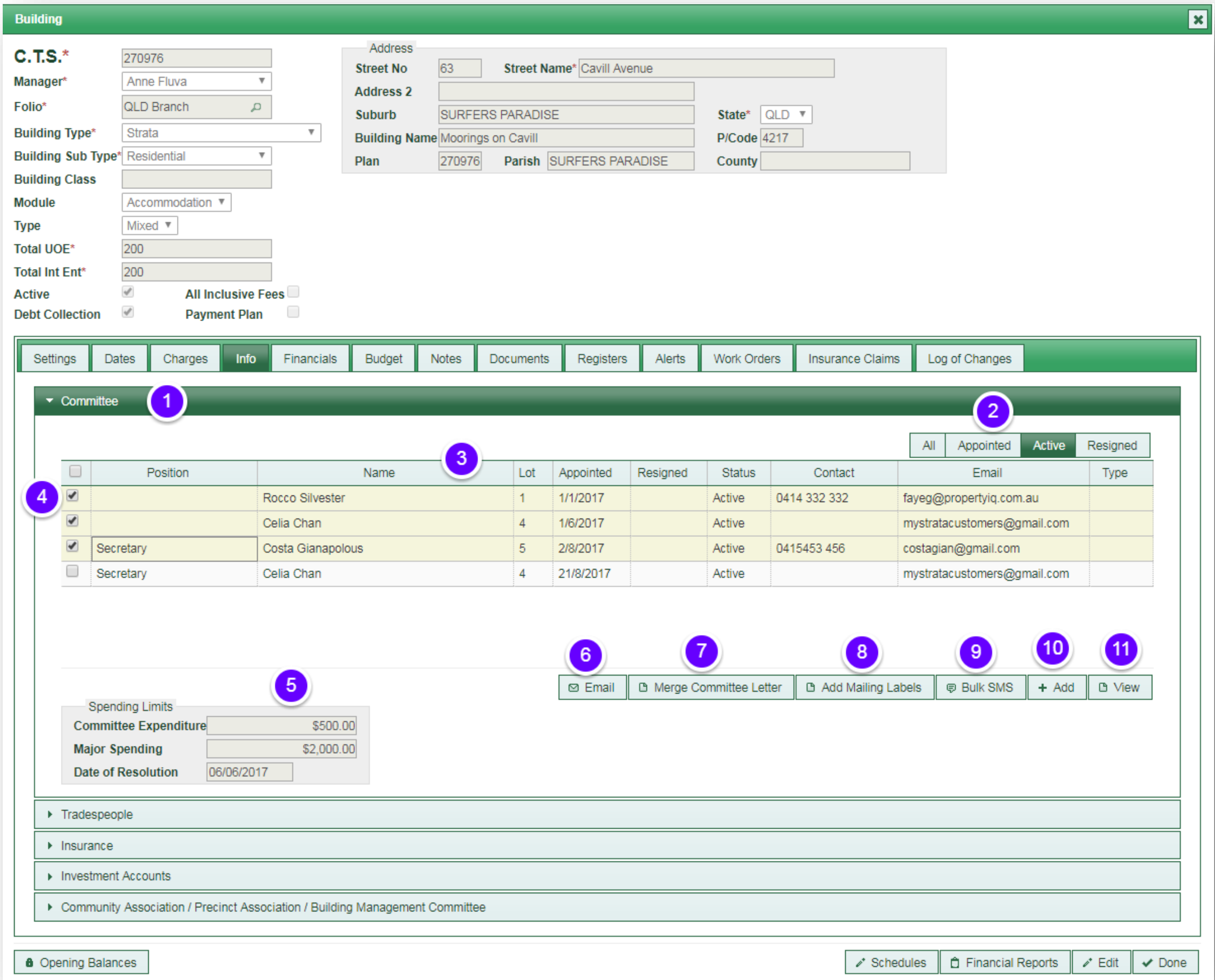
INFO TAB

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

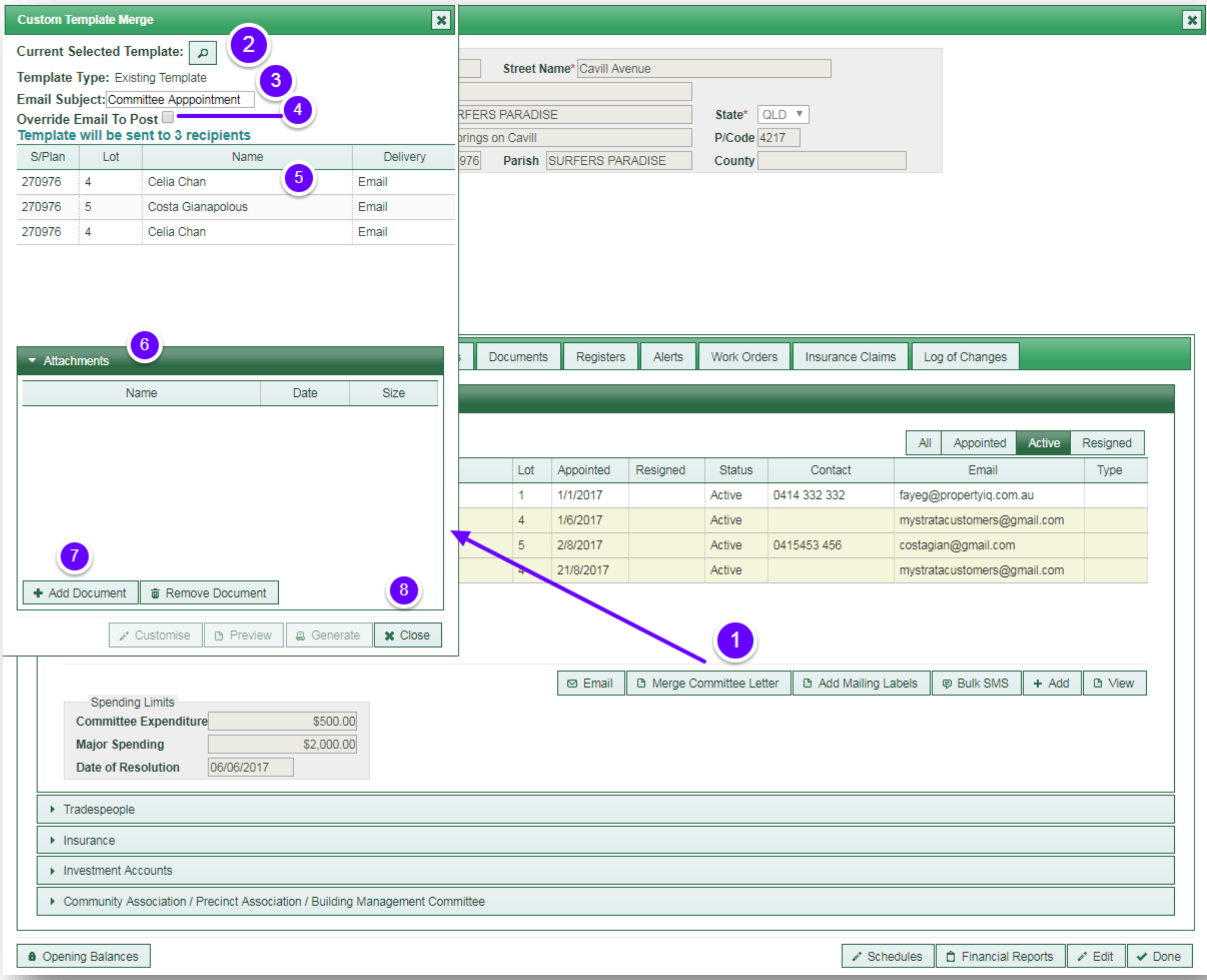
1. This is where you record all the members of the building's committee or council. Click on the white arrow to open
2. The screen defaults to view active committee members but you can click on the tabs to switch your view to all, appointed, active or resigned
3. The committee member's details show here
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



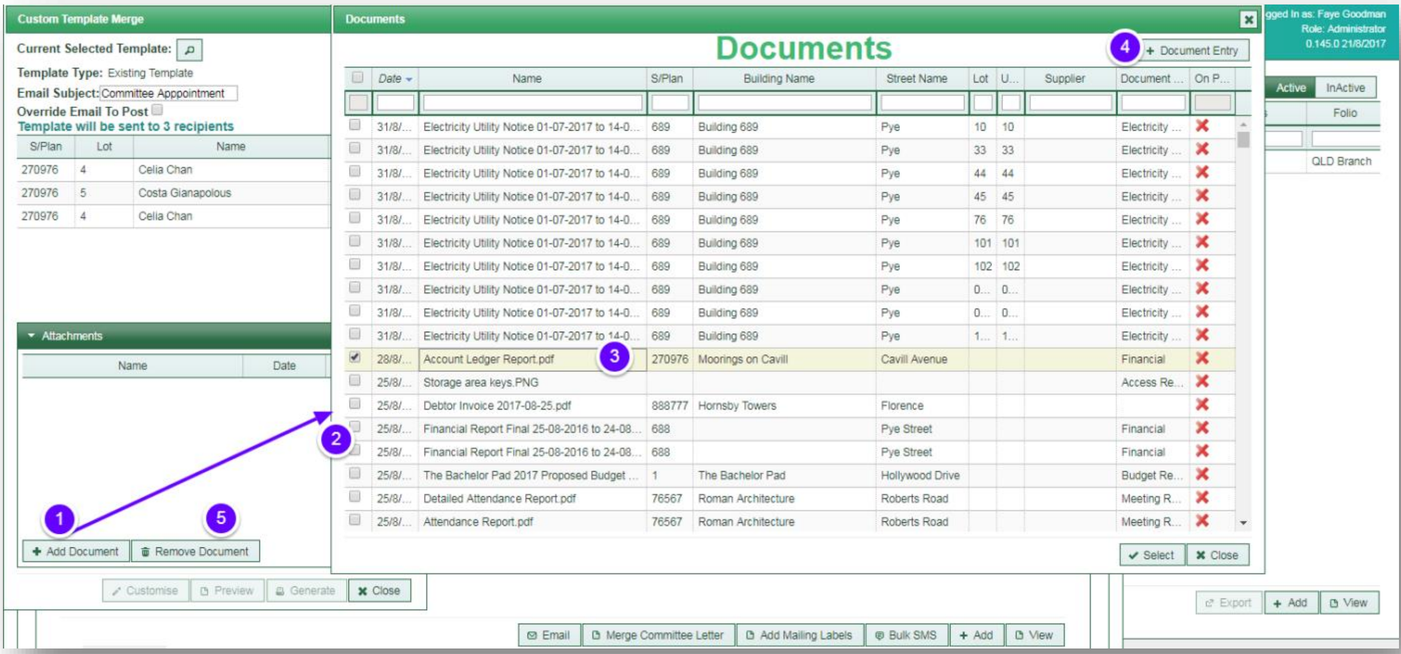
MAIL MERGING TO COMMITTEE MEMBERS

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



ADDING A DOCUMENT TO THE MAIL MERGE

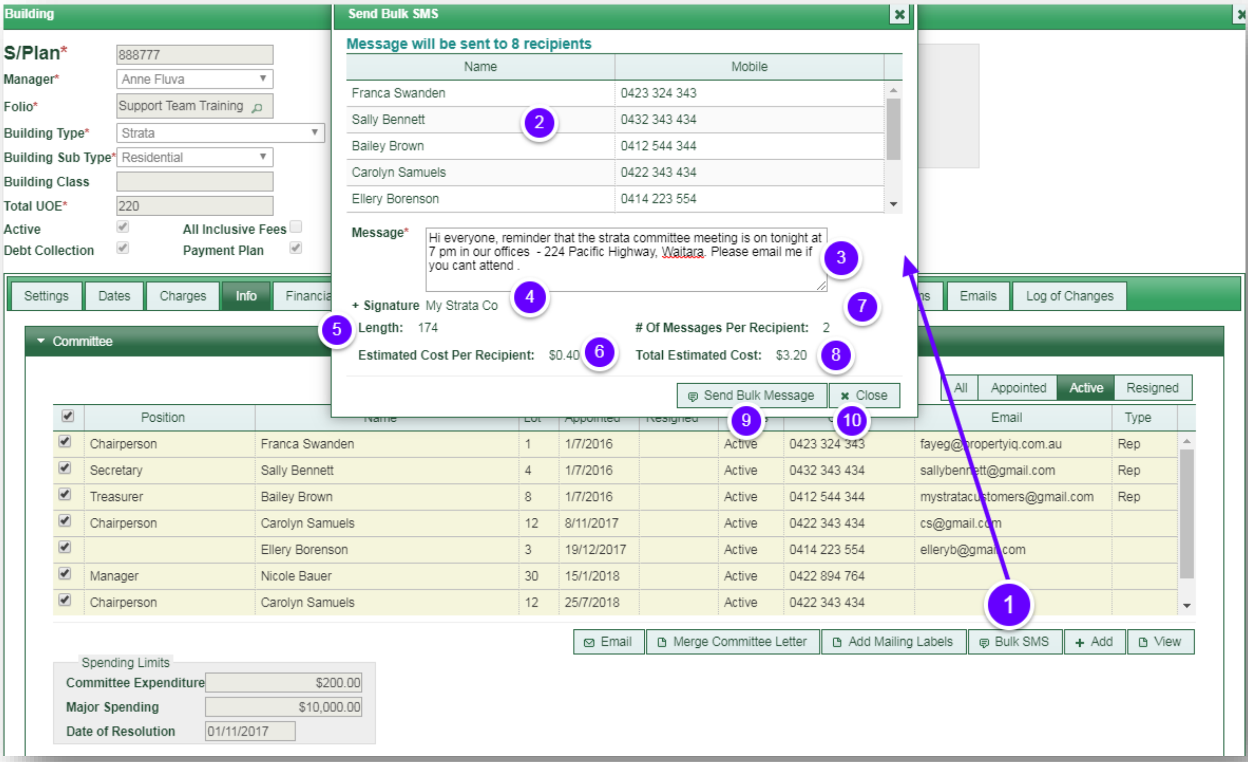
1. Select *Add Documents*
2. The documents show on the screen
3. Click on the document, to highlight it, and then double click to select it
4. Click on the *Document Entry* button to add a document that is on your computer, but not saved in PropertyIQ. This will also add the document to the building's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



SENDING A BULK SMS TO COMMITTEE MEMBERS

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

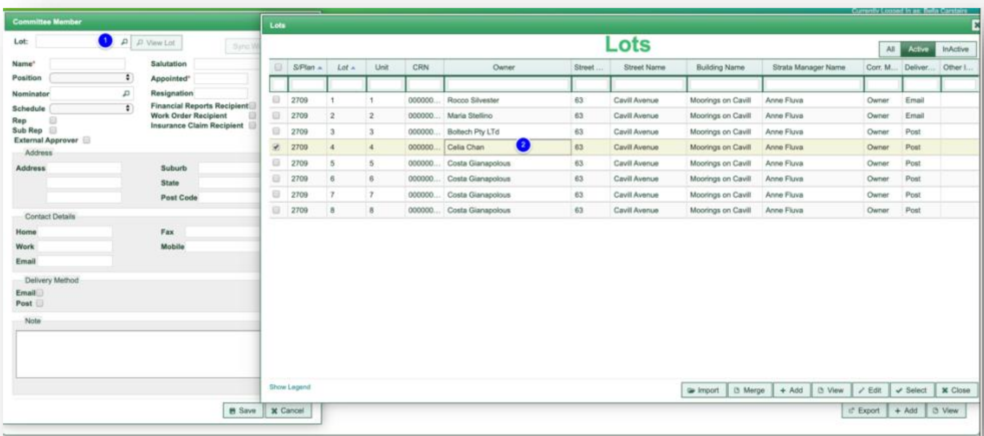
1. Select the committee members you want to SMS and click on the *Bulk SMS* button
2. The recipients and their mobile numbers show here
3. Enter your message here.
4. Your standard signature is set up in the settings menu - SMS tab. For more detail, see the manual "SMS"
5. The character count shows here
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



ADDING COMMITTEE MEMBERS

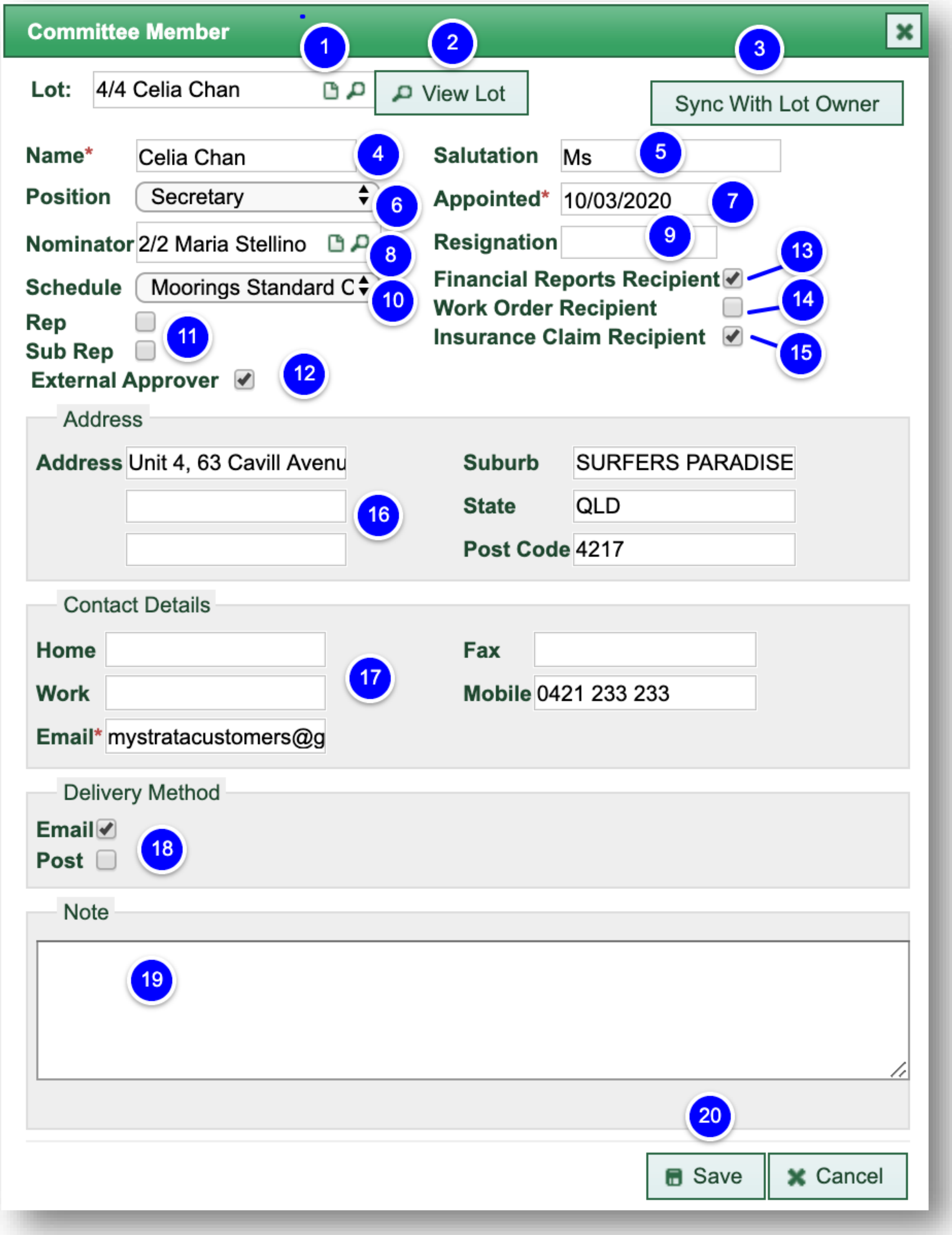
Click *+Add* to add committee members. You can add lots/owners from here, but you would normally do this in the lots/owners area and create all the lots and owners before this step.

1. Click on the search icon to a 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



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
Lot: 4/4 Celia Chan
View Lot
Sync With Lot Owner
Name* Celia Chan
Salutation Ms
Position Secretary
Appointed* 10/03/2020
Nominator 2/2 Maria Stellino
Resignation
Schedule Moorings Standard C
Financial Reports Recipient
Work Order Recipient
Insurance Claim Recipient
Rep
Sub Rep
External Approver
Address
Address Unit 4, 63 Cavill Avenu
Suburb SURFERS PARADISE
State QLD
Post Code 4217
Contact Details
Home
Work
Email* mystratacustomers@g
Fax
Mobile 0421 233 233
Delivery Method
Email
Post
Note
Save
Cancel
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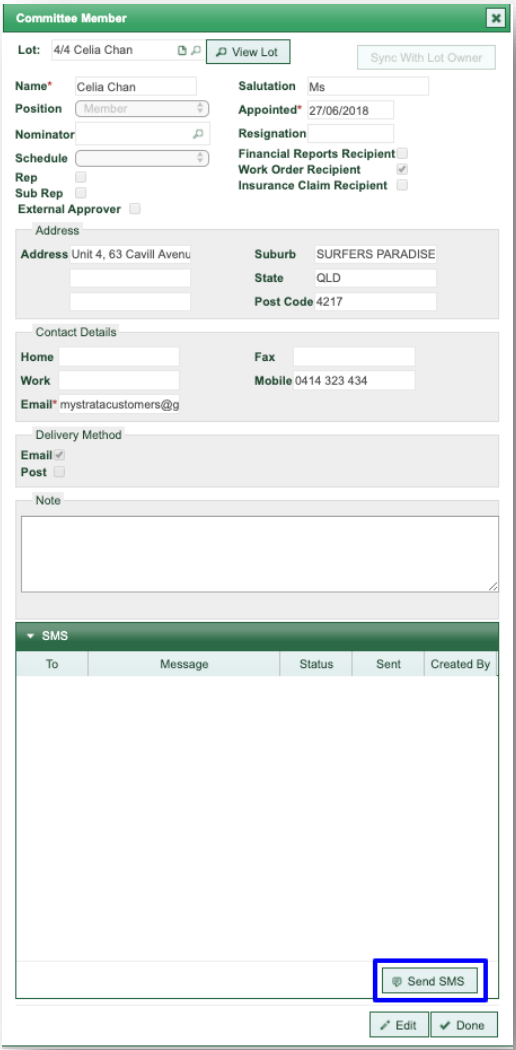
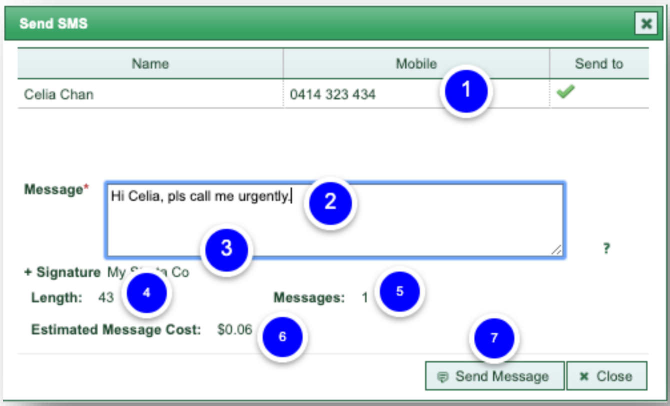
If you have SMS enabled on your account, you can SMS a single committee member from their committee card. Select *Send SMS*



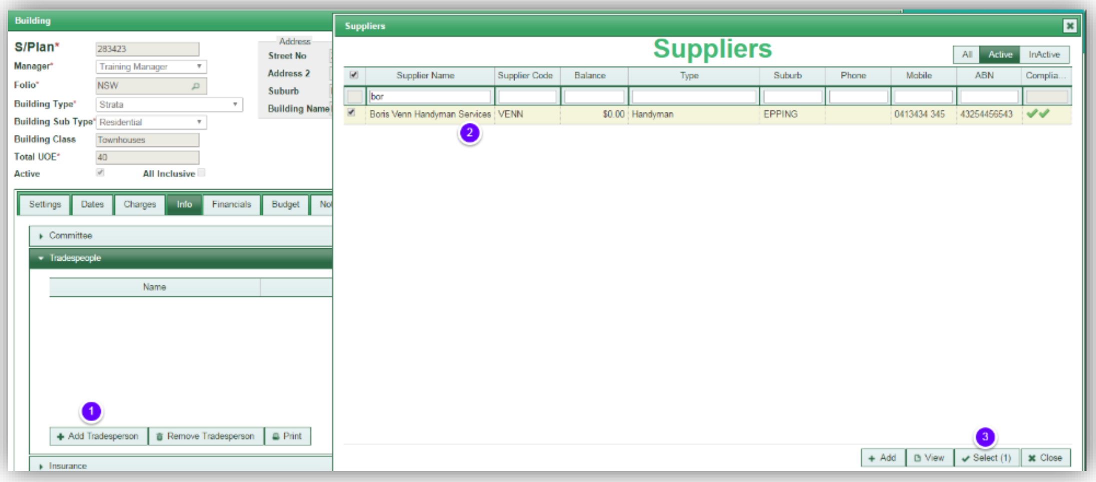
1. The committee member needs to have a valid mobile number
2. Enter your SMS text
3. There's an automatic signature applied to each text that is configured in your Settings>SMS area
4. The number of characters in your message shows here. SMS is charged in blocks of 160 characters. If your message exceeds 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*



TRADESPEOPLE

You can record the building's preferred tradespeople here. NOTE 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



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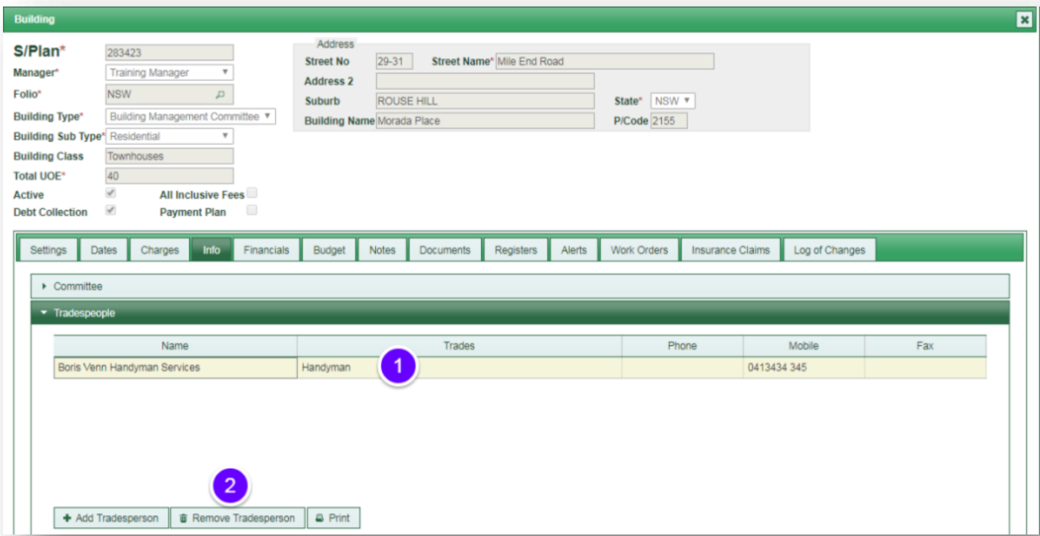
You can remove a preferred tradesperson

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.

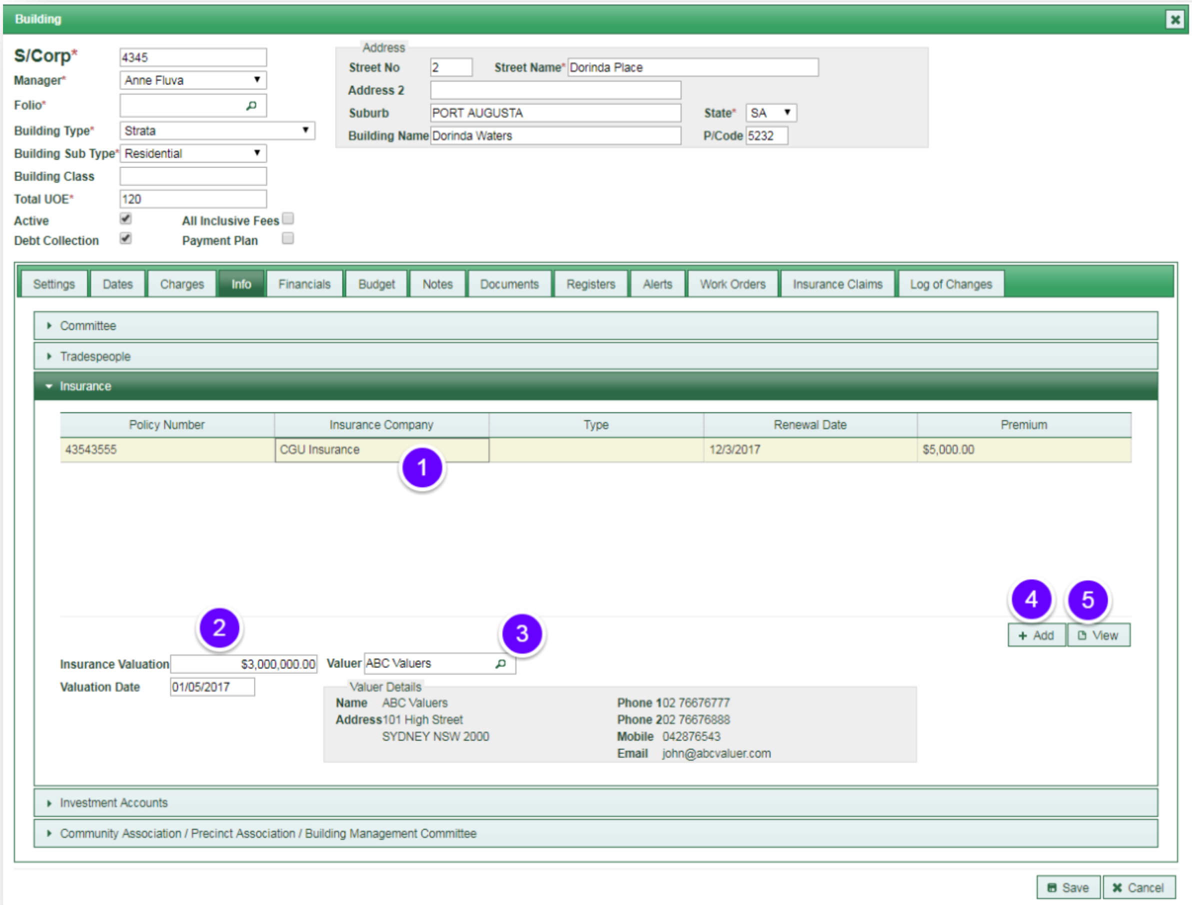


You can print a list of all preferred tradespeople for the building by clicking on the *Print* button.

INSURANCE

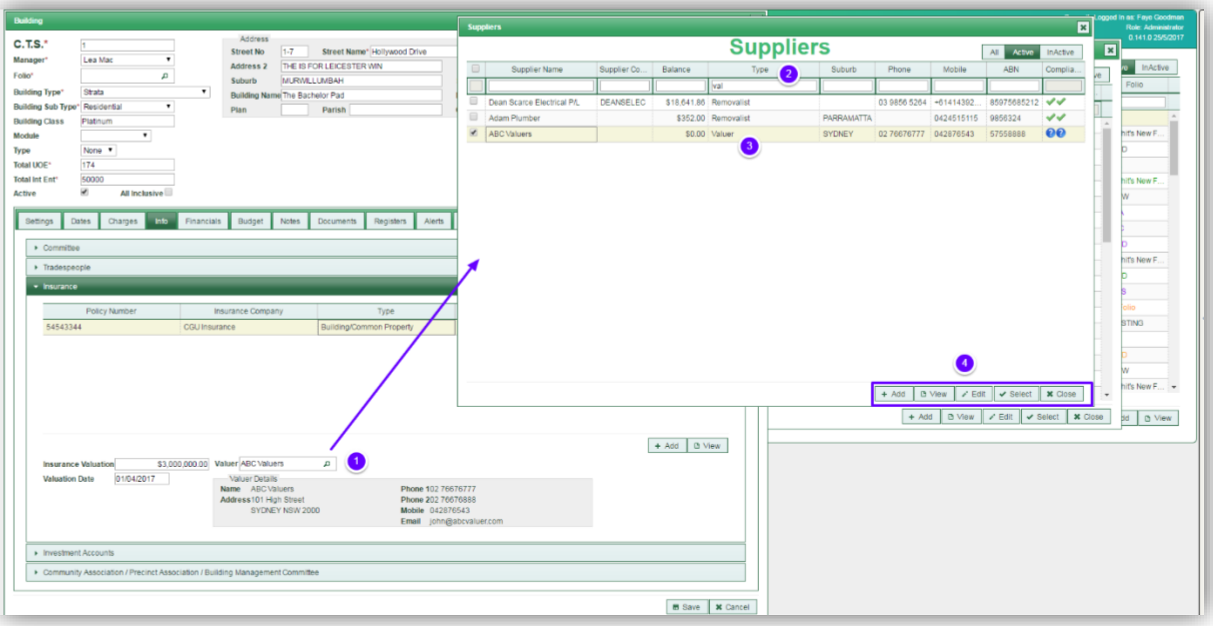
You can record all insurance policies relating to the building here. Recording your insurance policies here creates entries in your diary so you won't miss any policies expiring. This information is also utilised when you process an insurance claim. For full details about insurance claims, see the manual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



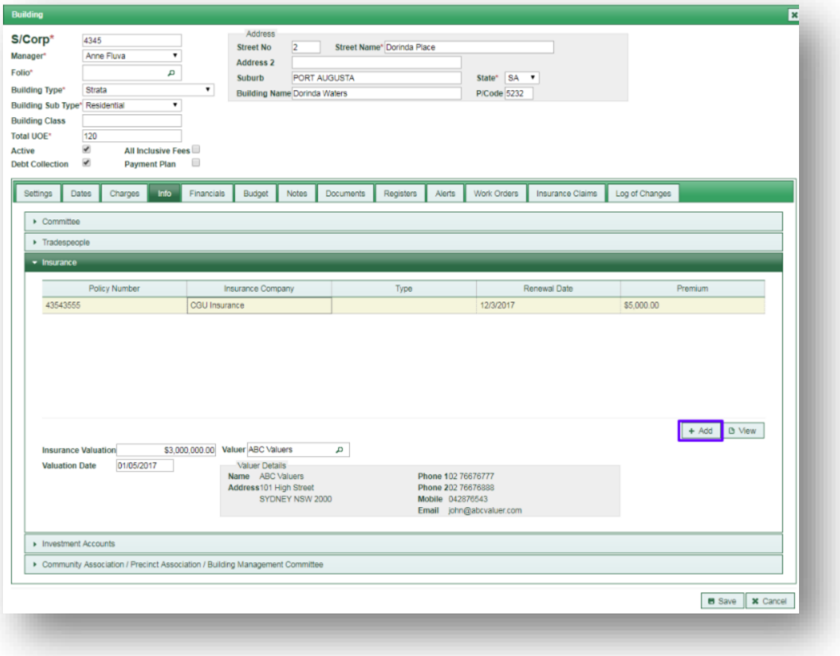
ADDING AN INSURANCE VALUER

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”



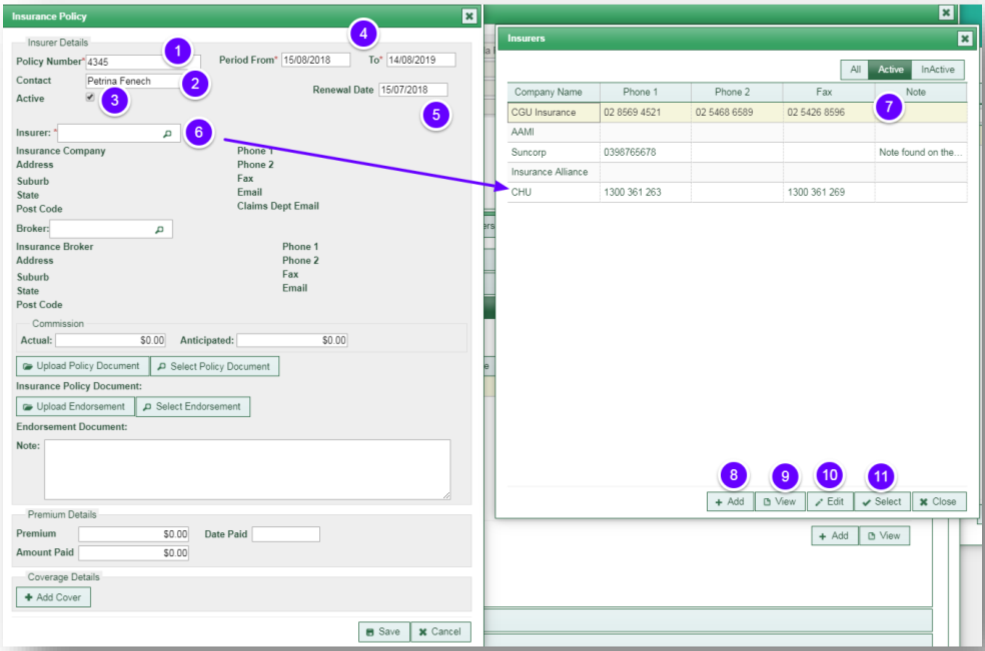
ADDING AN INSURANCE POLICY

+Add to get started



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

NOTE 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 Petrina Fenech
Active
Renewal Date 15/07/2018
Insurer: *
Insurance Company
Address
Suburb
State
Post Code
Phone 1
Phone 2
Fax
Email
Claims Dept Email
Broker:
Insurance Broker
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
0398765678
Note found on the...
Insurance Alliance
CHU
1300 361 263
1300 361 269
Add
View
Edit
Select
Close
1
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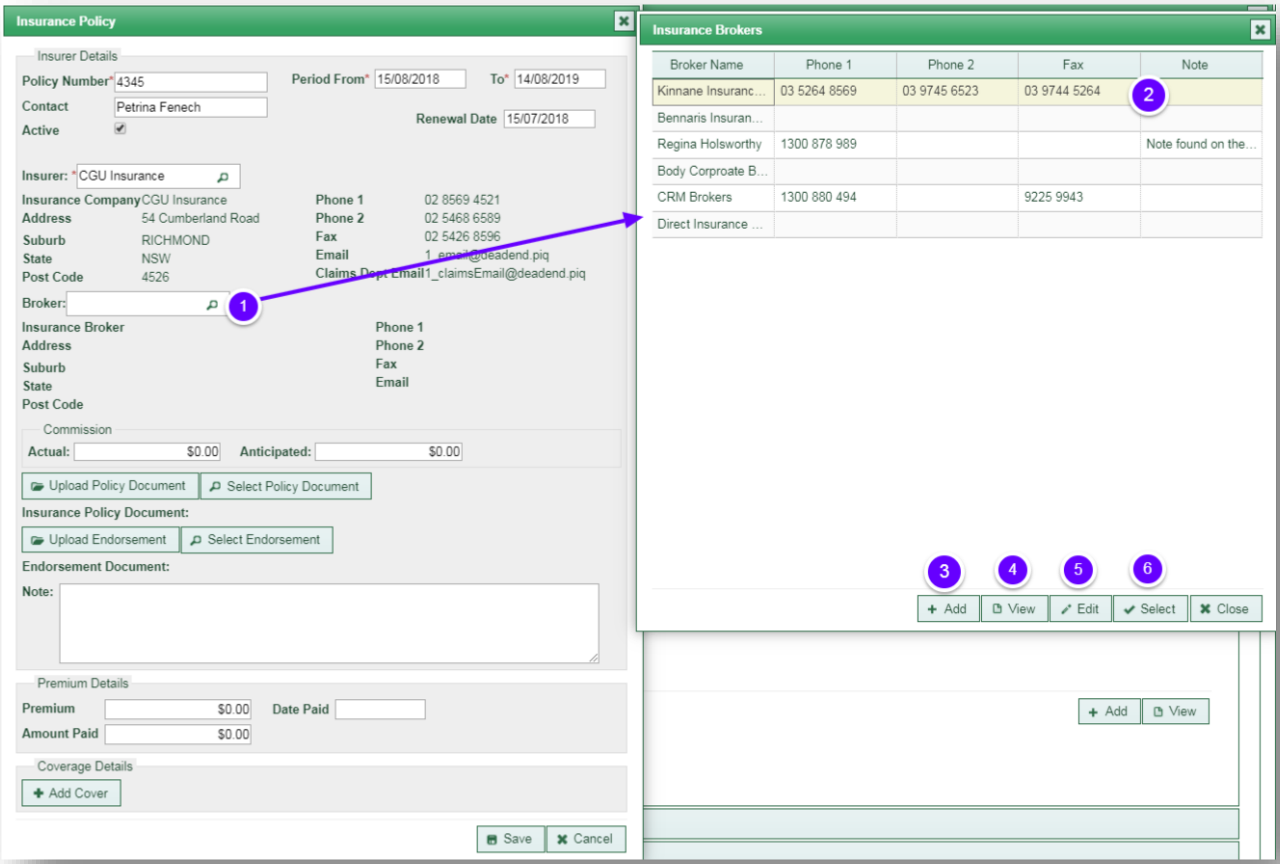
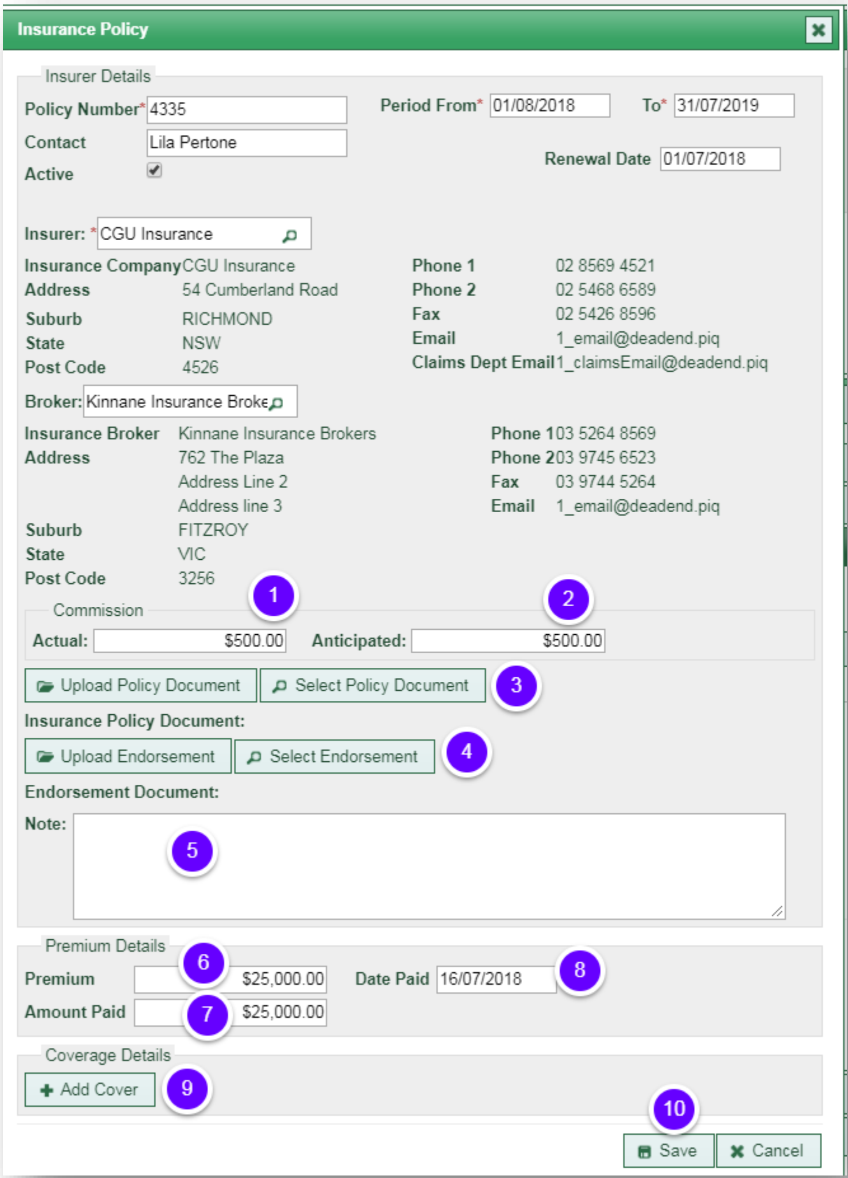
BROKERS

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)

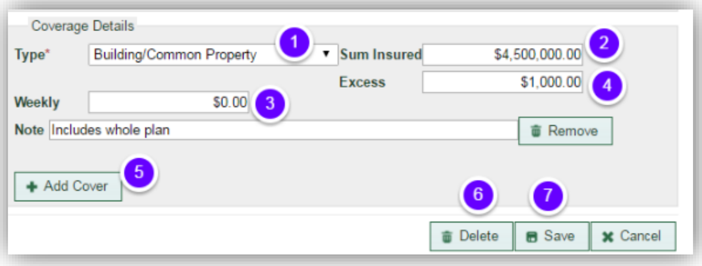


1. Enter your actual insurance commission here.
2. Enter your anticipated commission here.
3. Click here to upload a new policy document. See section below – uploading insurance documents
4. Click here to attach a document to this policy that is already in PropertyIQ. See section below – uploading insurance 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



ADDING INSURANCE COVER

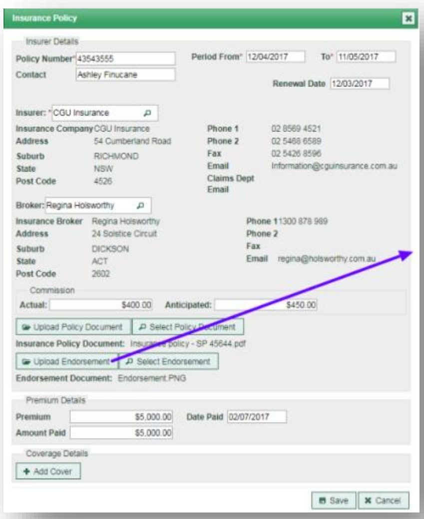
1. Choose the type of cover from the dropdown list
2. Enter the sum insured
3. Enter the amount of weekly premium payable (if paid weekly)
4. Enter the amount of excess payable if you make a claim
5. Enter any additional notes here
6. You can delete the cover here (This does not delete the whole policy,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

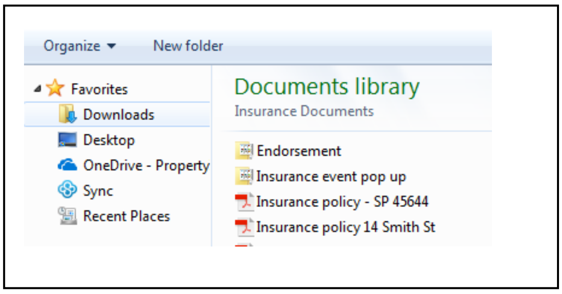


You will not be able to process an insurance claim on a policy unless it has Building/Common property cover attached to it.

UPLOADING INSURANCE DOCUMENTS

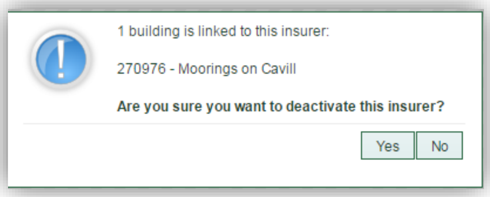
Click on *upload policy documents* or *upload endorsement* to attach a document that is saved on your computer but not yet uploaded into PropertyIQ. If you have already added the policy document or endorsement document to PropertyIQ, you can click *select policy document* to search for it.



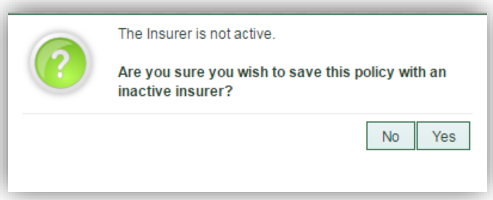


NOTE ABOUT INACTIVE INSURERS

You can inactivate 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 inactivate 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:

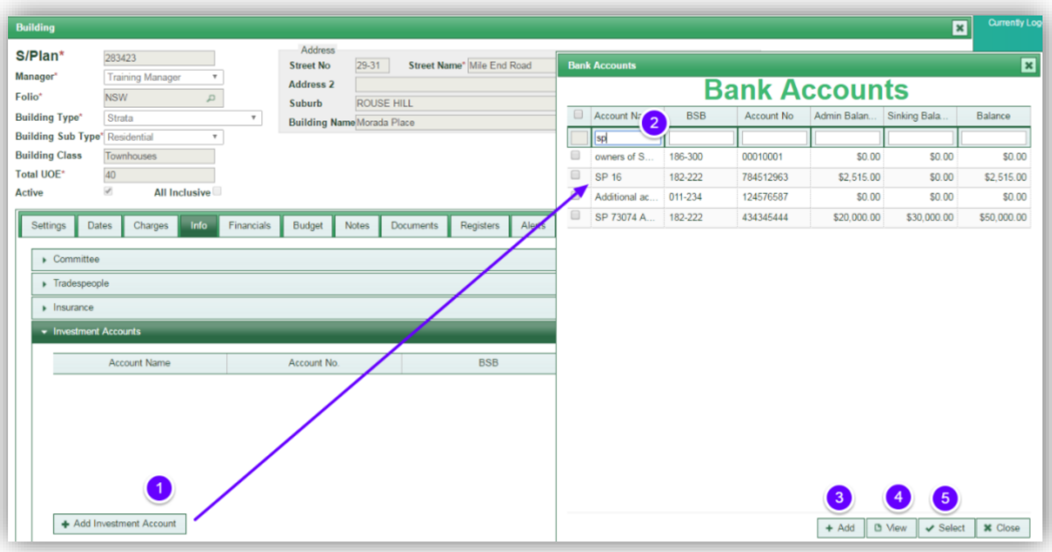


INVESTMENT ACCOUNTS

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 *Selec*t (or double click on the account you want to select)



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*