

# PropertyIQ™

## Diary

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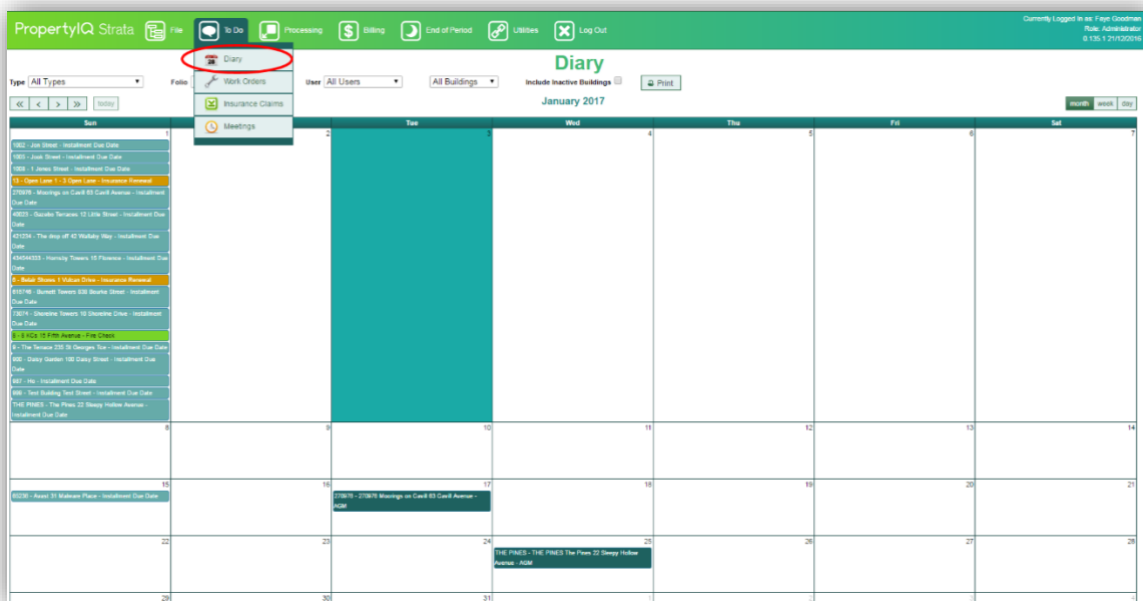
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## INTRODUCTION TO THE DIARY

The Diary in PropertyIQ allows you to plan your day, week and month. When you create a meeting, enter an insurance expiry, an instalment due date or any other important event, it will automatically appear in the diary. You can view your whole team's events or filter down to view an individual's events or even just the events for a particular building. Property IQ also creates "pop up" reminders for your own events to ensure you don't miss anything important. You can add events to the calendar manually too.












## GETTING STARTED

To access the diary, go to  and select *Diary*.



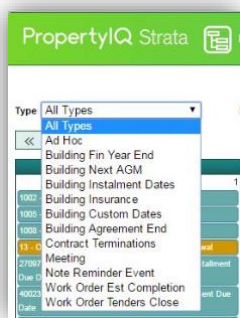
If you would like the diary to open whenever you log onto PropertyIQ, you can set the diary page as your homepage in your browser

Items in the diary are colour coded by type:

Building End of Financial Year		Building Next AGM	
Building Instalment Due		Manually created (ad hoc)	
Work order estimated completion		Insurance Renewal Due	
Building Custom dates		Building Agreement End	
Contract Termination		Work order tenders close	
Meeting			

When you open the diary the default view will show you all types of tasks for all users. You can filter the view.

1. Use the drop down menu to filter type of tasks you want to view. These task types are pre-set in PropertyIQ Strata



2. Use the dropdown menu to filter by folio
3. Use the dropdown menu to filter by user
4. Use the dropdown menu to filter by building
5. Tick to include inactive buildings
6. Click *Print* to create a PDF. After you click *Print* you will be able to filter again
7. Use the << and >> arrows to move forward or backwards by year. Use the < and > to move forward or backward by month if you are in the month view, forward or backward by week if you are in the week view or forward or backward by day if you are in the day view.
8. Month view is the default but you can click here to view *Week* or *Day*



## VIEWING AN ITEM ALREADY IN THE DIARY

1. Click on the event to open it
2. Click on *View Building* to open the building card for the associated building
3. Click *Done* when finished
4. If you are in a view that includes other users you will be able to see their events. If the event you clicked on is not one of yours, you can click to add it to your events. Once an event is showing as one of yours you will also have the option to Remove from My Events.

## VIEWING AN EVENT FROM THE POP UP ON THE SCREEN

PropertyIQ Strata

File To Do Processing Billing End of Period Utilities Log Out

Currently Logged In as: Training Manager  
Role: Administrator  
0.135.1 21/12/2016

Diary

Type: All Types Folio: All Folios User: All Users All Buildings Include Inactive Buildings Print

February 2016

Event

Summary: 66666P Santa Apartments 555 Christmas Street - AGM

Description: [Empty text box]

Start Date: 01/02/2016 All Day

End Date: 01/02/2016

C.T.S.: 66666P Santa Apartments 1,2

Lot: [Empty text box]

Supplier: [Empty text box]

Reminder 1: 8 Weeks

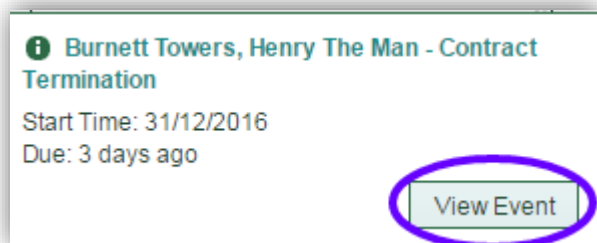
Add to My Events View Building Done

If you are in a view that includes other users and the event you clicked on isn't one of yours you can click Add to My Events to add it to your own calendar

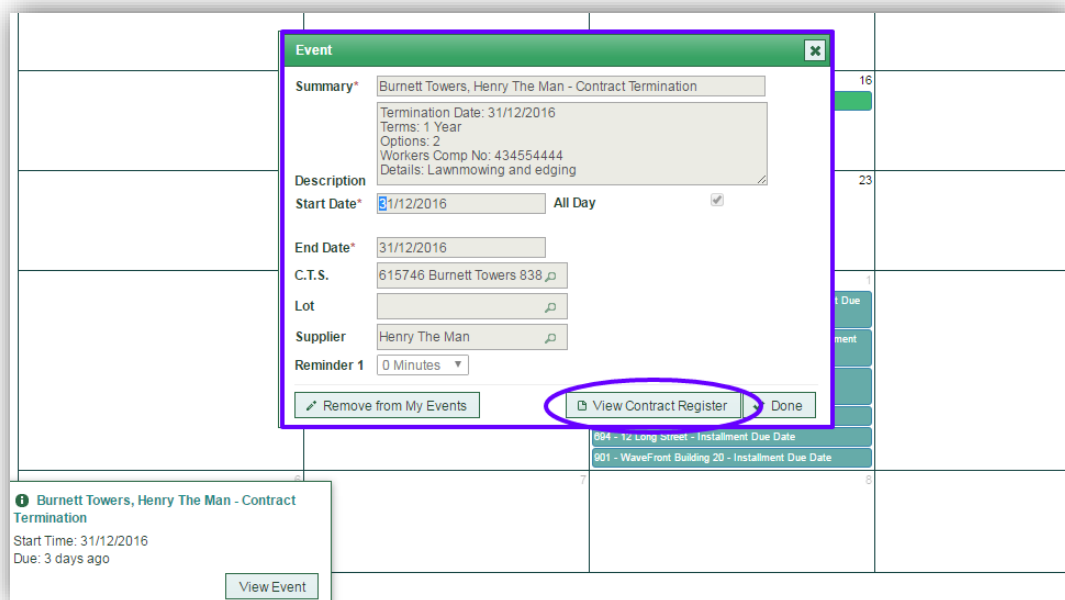
Barnett Towers, Henry The Man - Contract Termination  
Start Time: 31/12/2016  
Due: 3 days ago  
View Event

Events that have a reminder attached to them or events that are due or overdue will pop up on your screen. You can view the event from the pop up.

Click on *View Event* on the pop up



You will only receive pop up reminders for your own events. You can click on to remove them from your own calendar. Pop up reminders contain a link to the event or building they relate to.



The *View Contract Register* button view opens the contract information and allows you to view and edit the contract if you need to

**Contract Details**

Active ☒

Contractor  
Supplier/Entry The Man

Contract Details

Commencement Date 01/01/2016 Termination Date 31/12/2016  
Series 1 Year ☒ Copy Of Agreement On File  
Options 2  
Workers Comp No 431554444  
Details Of Duties  
Lawnmowing and edging  
Delegated Powers  
Basis Of Remuneration Invoiced each month  
Finance  
Name Of Financier  
Date Of Advice Date Of Withdrawal  
Edit X

## CREATING A NEW EVENT

1. From the Diary screen, click on the day that you want to create an event for
2. Enter summary details – this is what you will see when you view the calendar later
3. Enter more details – this is what you will see when you click to open the event
4. By default, the event will be ticked as an *All Day Event*. Click to untick if you want to allocate a time

The screenshot displays the PropertyIQ Strata software interface. At the top, there's a navigation bar with icons for File, To Do, Processing, Billing, and a calendar icon. The main area shows a calendar grid with events listed for various dates. A detailed event window is open, showing the following information:

- Event Summary:** Call Chairperson
- Description:** Call Chairperson to discuss action items from last special meeting.
- Start Date:** 02/02/2016
- End Date:** 04/02/2016
- C.T.S.:** 270976 Moorings on Cavill
- Lot:** 1/1 Rocco Silvester
- Supplier:** Jack of All Trades
- Reminder 1:** 30 Minutes
- Reminder 2:** 5 Minutes
- Buttons:** Save, Cancel, New Reminder

The calendar grid shows events for various dates, including "Call a committee" on 02/02/2016, "ap 10 - 10 Temple 15 Minutes Drive - AGM" on 04/02/2016, and "Call Chairperson" on 02/02/2016. The interface also includes a sidebar with a list of events and a bottom section for "Burton Towers, Henry The Man - Contract Termination".

- Once you untick the *All Day* box you will be able to set the start and end time

Event

Summary

Call Chairperson

Call Chairperson to discuss action items from last special meeting.

Description

Start Time 03/02/2016 - 10:00 All Day

End Time 10:00

C.T.S.

Lot

Supplier

+ New Reminder

Save Cancel

Time

Hour 10:00

Minute 00

Use the sliders to set the time

- If the event relates to a building, click on the search icon to find the appropriate building
- If the event relates to a lot owner, click on the search icon to find the appropriate lot owner
- If the event relates to a Supplier, click on the search icon to find the appropriate supplier
- Click on *New Reminder* to set a warning reminder. This creates a pop up that will appear on your screen at the time period you nominate. You can create as many reminders as you want by clicking *+New Reminder*. You can delete the reminder by clicking on the *Remove* button
- Click *Save* when you are ready