



# Training Guide for new users

Current as at 13 December 2022



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*Disclaimer:* This information has been prepared to assist you to get the most out of the PropertyIQ system. The information contained in this document does not constitute legal, financial, tax, accounting or any other advice, and nor should it be construed as such. Compliance with any laws which apply to you is your responsibility. You should obtain legal, financial, tax, accounting or any other advice before making any decision regarding this information. The PropertyIQ Products are versatile and adaptable to different jurisdictions and requirements. Accordingly, PropertyIQ does not certify or guarantee compliance with any Laws which might apply to you, and PropertyIQ disclaims all such liability. The use of this information by you is at your complete discretion and is wholly your responsibility. PropertyIQ accepts no liability for any loss howsoever caused arising from reliance upon the information contained in this document.

# Introduction

This document can be used as a starting point for new staff members to learn how to navigate PropertyIQ and the areas that may be relevant to your role.

## How to use this document

This document is not meant to be a definitive resource, and guidance should still be provided to new staff as your company processes will be unique to your business.

The document is separated into:

- Foundational knowledge
- The Accounts role
- Strata Manager and Assistants
- Maintenance and Compliance

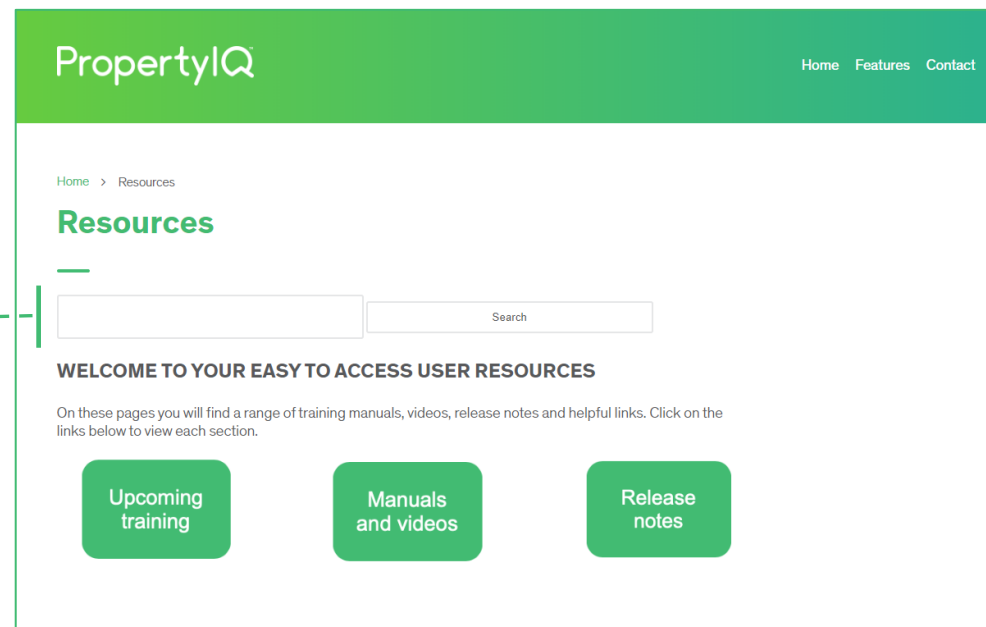
*A search bar is available on the Resources page where you can search for key words. This will search all the pages within the PropertyIQ resources (excluding content within PDFs).*

## Where to get help

Visit the PropertyIQ Resources page: [www.propertyiq.com.au/resources](http://www.propertyiq.com.au/resources)

It contains a wealth of information via manuals, training videos and user guides. Our release notes are also available here.

It's easy to find by going into Help within PropertyIQ or saving the web address as a bookmark on your browser.



# Foundation (1 of 2)

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Understanding how to navigate around PropertyIQ is foundational for every user.

## Getting Started and Navigating PropertyIQ

The links provided here will give you a basic understanding of these key areas in PropertyIQ.

- [Access to PropertyIQ and how to log in](#)
- [Usernames and password](#)
- [Strata terminology in Australia](#) (manual)
  
- [Introduction to the File menu](#)
- [Introduction to the To Do menu](#)
- [Introduction to the Processing menu](#)
- [Introduction to the Billing menu](#)

More videos can be found on our [\*\*Getting Started\*\*](#) page.

## Building Card

The building card contains all the relevant information for a building in one area.

- [Getting started with Buildings](#)
- [Dates tab](#)
- [Introduction to the Info tab](#)
- [Committee details](#)
- [Insurance tab](#)
- [Financials tab](#)
- [Documents tab](#)
- [Registers tab](#)
- [Works orders and insurance claims tabs](#)
- [Emails tab](#)

More videos can be found on the [\*\*Managing Buildings\*\*](#) resource page.



# Foundation (2 of 2)

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Understanding how to navigate around PropertyIQ is foundational for every user.

## Lot card

The lot card contains all the relevant information for a single lot.

- [Introduction to Lots](#)
- [Contacts tab](#)
- [Info tab](#)
- [Settings tab](#)
- [Lot ledger tab](#)
- [Notes tab](#)
- [Documents tab](#)
- [Emails tab](#)
- [Email and mail merge](#)
- [Printing a lot owner page](#)
- [Emailing a lot owner](#)
- [Lot owner export](#)
- [Linking lot owners](#)
- [Processing a change of ownership](#)

More videos can be found on the [Lots](#) resource page.



# Accounts

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The scope of an accounts person can vary between strata management businesses and most accounting functions should be done with care. It's recommended that your internal training for PropertyIQ is in line with your business processes.

## Accounts Receivable

The accounts receivable function looks to receipt payments of levies, reconcile the banking and make allocations to lots and debtors.

- [TXN file processing and receipting](#) (manual)
- Adjustments to transfer credits to and from unallocated credit for a lot
  - [moving amounts to "unallocated" credit from a lot](#)
  - [moving amounts from "unallocated" credit to a lot](#)
  - [transfer credits from one lot to another](#)

More videos can be found on the [Adjustments](#) resource page.

## Due (Levy / Fee) Notices

Generating due notices for levies that have been entered into PropertyIQ.

- [Generating and sending due \(levy\) notices](#) (video)
- [Levies and fee notices](#) (manual)
- [Due notices and debtor statements](#) (manual)

## Accounts Payable

The accounts payable function looks to enter and process supplier invoices.

- [Supplier screen](#)
- [Supplier card](#)
- [Supplier transactions](#) (invoice data entry)
- [Supplier payment run](#)

## Arrears Notices

Generating an arrears or reminder notice is very similar to the due notice process, and the **Debt Collection v2** process is a more efficient way of managing arrears.

- [Debt Collection v2 videos page](#)

To activate this on your PropertyIQ, contact us at [support@propertyiq.com.au](mailto:support@propertyiq.com.au).

# Accounts Month End Workflow

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Our recommended month end workflow covers four phases.



## Phase 1: Collect Management Fees

Collect management fees (including variable and activity charges) that are due.

- [Process a fee schedule run](#)
- [Process a supplier payment to your general account](#)

## Phase 2: Reconcile the Bank Rec

Reconcile the bank accounts using statements from Active Banking.

- [Upload bank statements from Active Banking](#)
- [Completing bank reconciliation for all bank accounts](#)

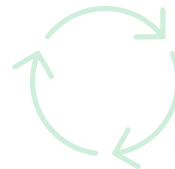
## Phase 3: Generate Reports

- [Generate and send any financial reports to committee/council members](#)

## Phase 4: Process BAS for GST Registered Buildings

If applicable, process BAS reports for any GST registered buildings.

- [This link takes you to the BAS Reporting page](#)



# Strata Manager and Assistants (1 of 2)

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The strata managers role can include a variety of tasks within PropertyIQ. In addition to the foundational topics, this list of topics should be covered by a strata manager or assistant.

## General Information

- [Committee details](#)
- [Recording preferred contractors/suppliers](#)
- [Lot owner contacts tab](#)
- [Supplier Screen](#) and [Supplier Card](#)

Additional functions for the **strata manager**

- [Activity Log screen](#) (additional charging screen)
- [Processing an activity log item](#) (entering an additional charge)

## Budgets

Budgets in PropertyIQ form part of your year end process.

These links provide an overview of the budget area. You may need to refer to your internal processes for the full end to end process.

- [Viewing budgets](#)
- Preparing budgets by:
  - [expenditure only](#)
  - [expenditure less income](#), or
  - [levy income only](#)
- [Accepting the budget and striking levies](#)





# Strata Manager and Assistants (2 of 2)

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The strata managers role can include a variety of tasks within PropertyIQ. In addition to the foundational topics, this list of topics should be covered by a strata manager or assistant.

## Meetings

The meetings module in PIQ can streamline your meetings process by creating standard motions and meeting templates.

The **motions library** is where standard motions are created to use in meetings.

Once your motions have been created, meetings can be created and notices built, generated and distributed to owners.

- Meetings screen
- Creating a new meeting
- Sending meeting notices
- Recording attendance
- Recording voting results
- Creating and sending minutes

Visit our **meetings resource page** for additional videos and detailed instructions on the full meetings process.

## Reporting

- Financial reporting
- Lot owner export
- Insurance claims register
- Register reports (assets, common property, contracts, exclusive use, etc.)



# Maintenance and Compliance

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The maintenance and building compliance role can vary between strata management businesses and can often be managed by an admin team.

## General Information

- [Committee details](#)
- [Recording preferred contractors/suppliers](#)
- [Lot owner contacts tab](#)
- [Supplier Screen](#) and [Supplier Card](#)
- [Diary and diary reporting](#) (manual)

## Insurance

Insurance policies and insurance claims can be managed within the building card.

- [Insurance policies](#)
- [Insurance claims screen](#) (including insurance claims register report)
- [Processing an insurance claims](#)

More information can be found on the [\*\*Insurance Claims\*\*](#) resource page.

## Registers

The building card has a registers tab where important information on the building can be kept.

- [Registers tab](#) including producing a registers report
- [Registers \(manual\)](#)

## Work Orders

Work orders can be accessed from the work orders menu (global) or within the building (local).

- [Work orders screen](#) including producing a Job Register (reporting)
- [Issuing a work order \(without a quote\)](#)
- [Issuing a work order \(quote required\)](#)

More information can be found on the [\*\*Work Orders\*\*](#) resource page.

