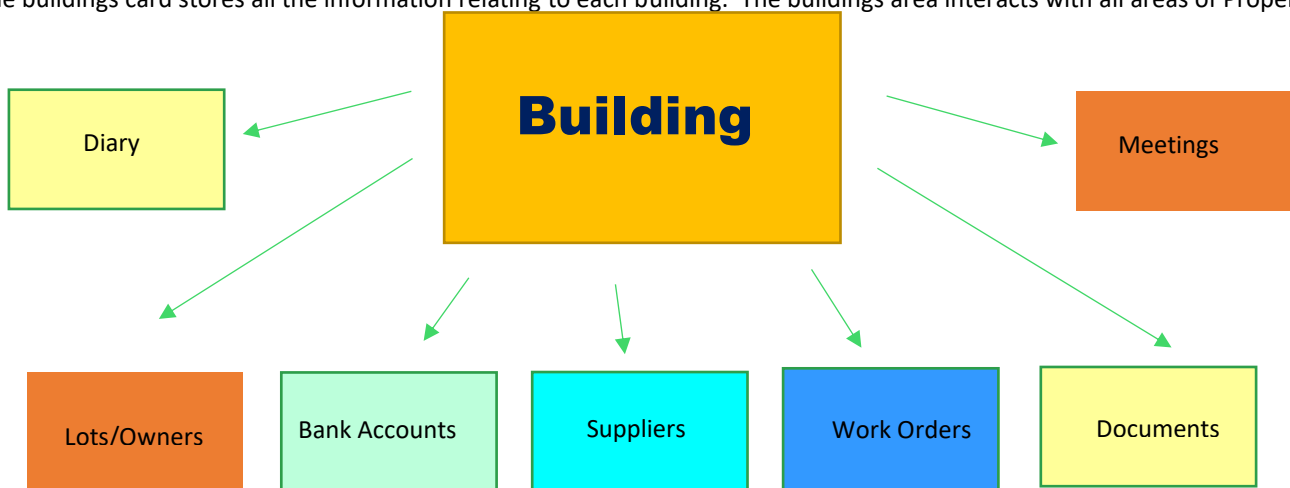


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INTRODUCTION TO BUILDINGS

The buildings card stores all the information relating to each building. The buildings area interacts with all areas of PropertyIQ.



This is where you can add, view and edit:

Settings – bank account, tax status, interest and discounting rules and important contacts

Dates – Important dates such as AGM and financial year

Charges – your fixed and variable management fees.

Info – Committee members, tradespeople, Insurance, Investment accounts, internal committees.

Financials – balances and owner positions, create and manage contribution schedules

Budget – planning and implementing the expenditure and income for a building

Notes – here you can add, edit and view any notes relating to the building

Documents – view, email and print all documents relating to the building

Registers – keep track of assets, lot authorisations, contracts and funding proposals

Alerts – create and manage alerts for important events

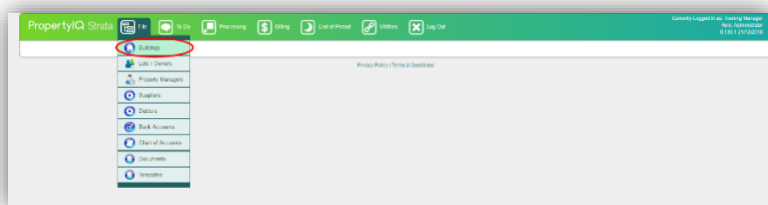
Work Orders – view and edit work orders for the building

Log of Changes – view a change log for the building

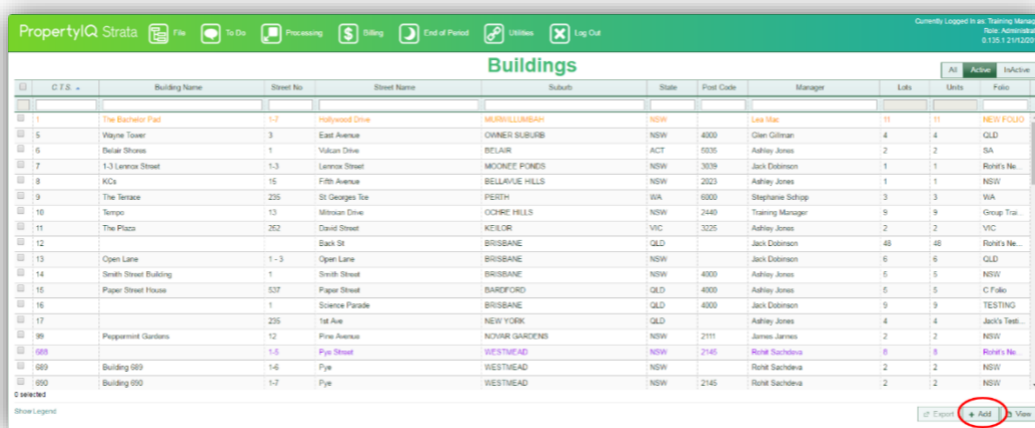
ADDING A NEW BUILDING



To add a new building go to **File** and select Buildings



Click on **+Add** at the bottom of the screen



BUILDING DETAILS

1. Enter the full building address. The fields with an asterisk are required. The state you select enables other state specific fields.
2. Enter the strata/community corporation number
3. Use the dropdown list to select the strata manager from the list of users
4. Use the dropdown list to select the folio (if you use folios in your company)
5. Use the dropdown list to select the building type from the dropdown list. The building types available are specific to SA. Your selection affects the terminology and layout of your levy notices.
6. Enter the building sub-type – commercial or residential
7. Enter a building class (optional)
8. Enter the total units of entitlement for the building
9. The building will be active by default. You can untick to make the building inactive if you no longer manage it
10. Tick the *All Inclusive* tick if your fees for managing this building are all inclusive. For example, if you don't charge extra for phone calls or photocopying.



You need to complete all the fields with an asterisk on the main screen (except folio) and at least the financial year, levy year, levy frequency and attach a bank account to the building before you can save the building. All other information can be added later.

DATES TAB

1. Enter the first day of the current financial year here (required)
2. Enter the date of the next AGM here (optional)
3. Enter the date of the first AGM here (optional)
4. Enter the date of the last AGM here (optional)
5. Enter the levy year start date here (required)
6. Enter the levy frequency here (required)
7. Enter the number of pre-issue levies here. You can enter up to 4 pre-issues
8. Enter the date the building was first registered here (optional)
9. Enter the date the building was built (optional)
10. Enter the date you acquired the management of the building (optional)
11. If the management of the building is lost at a later date, you can record the date here.
12. Click here to add custom dates for the building. Any dates you set here will appear in the diary.

Building

S/Corp* 4345

Manager* Anne Fluva

Folio* Support Team Training

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** **Emails** **Log of Changes**

Fin Year* 01/04/2018

Next AGM 10/04/2019

First AGM 02/04/2016

Last AGM 08/04/2017

Levy Year Start* 01/06/2016

Levy Frequency* Quarterly

Preissue None

Date Registered 02/02/2017

Date Built 11/10/2016

Date Acquired 04/03/2018

Date Resigned

Custom Dates

Description **Date** **Type**

+ Add Custom Date

Save **Cancel**

ATTACHING A BANK ACCOUNT

You need to attach a main bank account to the building before you can save it.

Building

S/Plan* 283423

Manager* Faye Goodman

Folio* B Folio

Building Type* Strata

Building Sub Type* Residential

Building Class Townhouses

Total UOE* 120

Active ☒ **All Inclusive** ☐

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

Bank Account

Name Morada Place

BSB 182-222

Account No 583544

Balance \$0.00

Last Rec Date

Account*

Auto Associate Levy Receipts ☒

Reserve Funds ☒

Balance Limit \$500.00

Tax Settings

Income Tax Return ☒

GST Registered ☒

Frequency Quarterly

Bank Accounts

Account Na... **BSB** **Account No** **Admin Bala...** **Sinking Bala...** **Balance**

morad **182-222** **583544** **\$0.00** **\$0.00** **\$0.00**

Morada Place **182-222** **583544** **\$0.00** **\$0.00** **\$0.00**

Type in some key letters or numbers to find the building you are looking for

Click on the search icon to start your search

Click Select to attach the bank account to the building.

+ Add **View** **Select** **Close**

For detailed information on the other tabs, please refer to the other *Buildings* manuals -

PropertyIQ

Quick guide to Adding a Building – South Australia

14.8.2018

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