

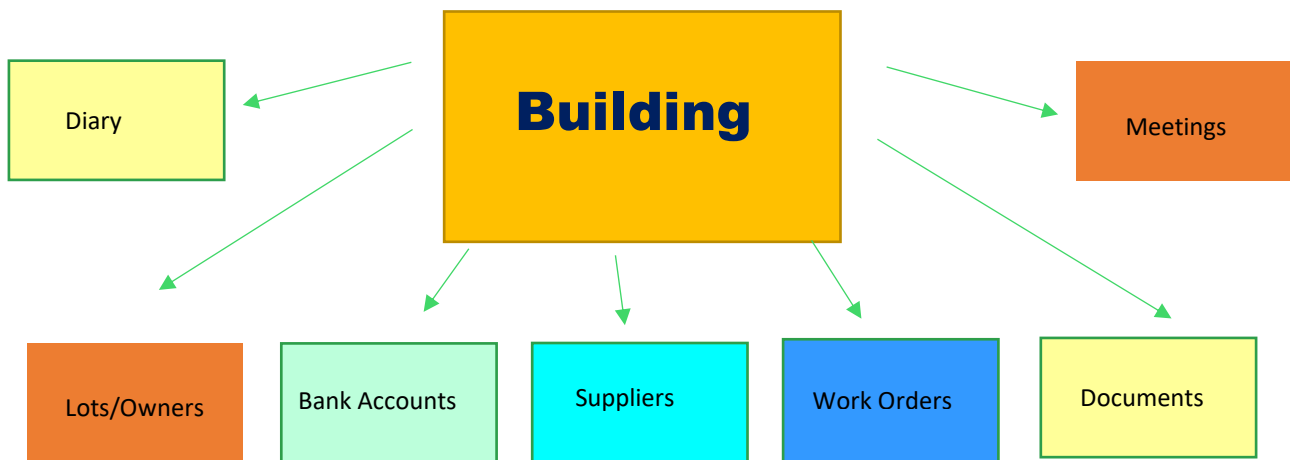
Quick guide to adding a building – Tasmania

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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



The building card holds all the information about the buildings you manage. There are separate manuals for each tab in the building card.

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

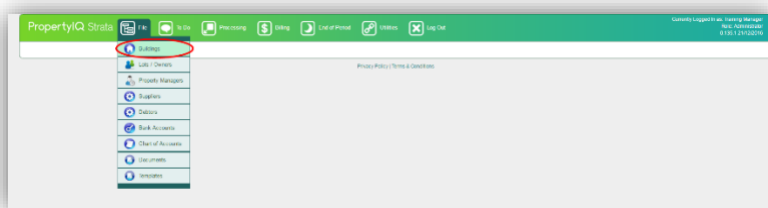
Work Orders – view and edit work orders for the building

Log of Changes – view a change log for the building

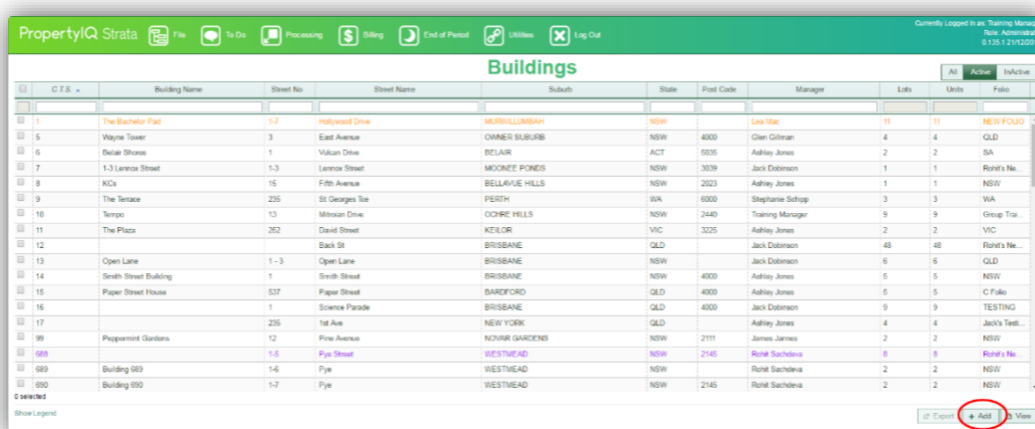
ADDING A NEW BUILDING



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



Select **+Add** at the bottom of the screen



BUILDING DETAILS

1. First step is to select the state from the dropdown list first. This determines other available fields and settings that are specific to each state
2. Enter the strata corporation number
3. Select the strata manager from the dropdown list. This list shows all users in your company (or folio) that have strata manager ticked on their user profile
4. If you use folios in your company, select the the folio from the dropdown list
5. If you have selected a folio but want to remove it, use the trash symbol
6. Select the building type from the dropdown list. The building types available are specific to Tasmania. Your selection affects the terminology and layout of documents such as levy notices and meeting agendas.
7. Select the building sub-type from the dropdown list.
8. Enter a building class (optional)
9. Enter the total units of entitlement for the building
10. The building is *active* by default. You can untick to make the building inactive if you no longer manage it
11. *Debt collection* is selected by default. Leave this ticked if you want this building to be included when you process a due notice run that includes arrears, final or legal notices. Only untick this if you are not conducting any debt collection activity for this building
12. Select *all inclusive fees* if your fees for managing this building are all inclusive. For example, if you don't charge extra for phone calls or photocopying. This is just a reminder for you not to charge extra fees, it doesn't affect your charges or fee schedules.
13. If *debt collection* is ticked, you can also tick here to include a payment plan statement that will show whenever Arrears, Final or Legal notices are sent. A global payment plan statement is entered your application settings and you must also have the correct merge field set up on your notice template for this wording to show on your notices. See the manuals "Settings" and "Templates" for full details
14. Enter the building address details here
15. A building name is optional
16. If you have ticked Payment Plan, and you have a global payment plan statement entered in your application settings, you can enter payment plan details here that only apply for this building. The wording you enter here will override the global payment plan statement when printing notices for this building only.

Building

S/Corp* 34555 **2**

Manager* Anne Fluva **3**

Folio* TAS BRANCH **4**

Building Type* Strata **5**

Building Sub Type* Residential **6**

Building Class Townhouses **7**

Total UOE* 100 **8**

Active ☒ **10**

Debt Collection ☒ **11**

All Inclusive Fees ☐ **12**

Payment Plan ☒ **13**

Address

Street No 1 **14**

Street Name* Pemell Way **15**

Address 2

Suburb BATTERY POINT **16**

State* TAS **1**

P/Code 7001

Building Name Tasman Towers **15**

Payment Plan Statement ? **16**

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

▶ Bank Account	▶ Owner Interest
▶ Tax Settings	▶ Levy Discount
▶ Original Proprietor	▶ Parking
▶ Auditor	▶ Onsite Manager
▶ Utility Invoicing	▶ Caretaker

Save **Cancel**



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. For full details about pre-issues, see the manual "Budgets"
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 you no longer manage the building, you can record the date here. (You will also need to make the building inactive once you have completed all the necessary steps to close a building.)
12. Click here to add custom dates for the building. Any dates you set here will appear as reminders in the diary.

Building

S/Corp*

34555

Manager*

Anne Fluva

Folio*

TAS BRANCH

Building Type*

Strata

Building Sub Type*

Residential

Building Class

Townhouses

Total UOE*

100

Active

☒

All Inclusive Fees

☐

Debt Collection

☒

Payment Plan

☒

Address

Street No

1

Street Name*

Pemell Way

Address 2

Suburb

BATTERY POINT

State*

TAS

Building Name

Tasman Towers

P/Code

7001

Payment Plan Statement

Settings

Dates

Charges

Info

Financials

Budget

Notes

Documents

Registers

Alerts

Work Orders

Insurance Claims

Emails

Log of Changes

Fin Year*

01/09/2018

1

Next AGM

20/09/2019

2

First AGM

19/09/2015

3

Last AGM

10/09/2018

4

Levy Year Start*

01/10/2018

5

Levy Frequency*

Quarterly

6

Preissue

None

7

Date Registered

01/08/2014

8

Date Built

06/09/2013

9

Date Acquired

01/07/2018

10

Date Resigned

11

Custom Dates

Description

Date

Type

+ Add Custom Date

12

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 ☐

Bank Accounts

Account Na...	BSB	Account No	Admin Bala...	Sinking Bala...	Balance
mora		583544			
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.

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
Relevancy Account

+ Add View Select Close

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

Settings
Dates
Charges
Info
Financials
Budget
Notes
Documents
Registers
Alerts
Opening Balances