

PropertyIQ™

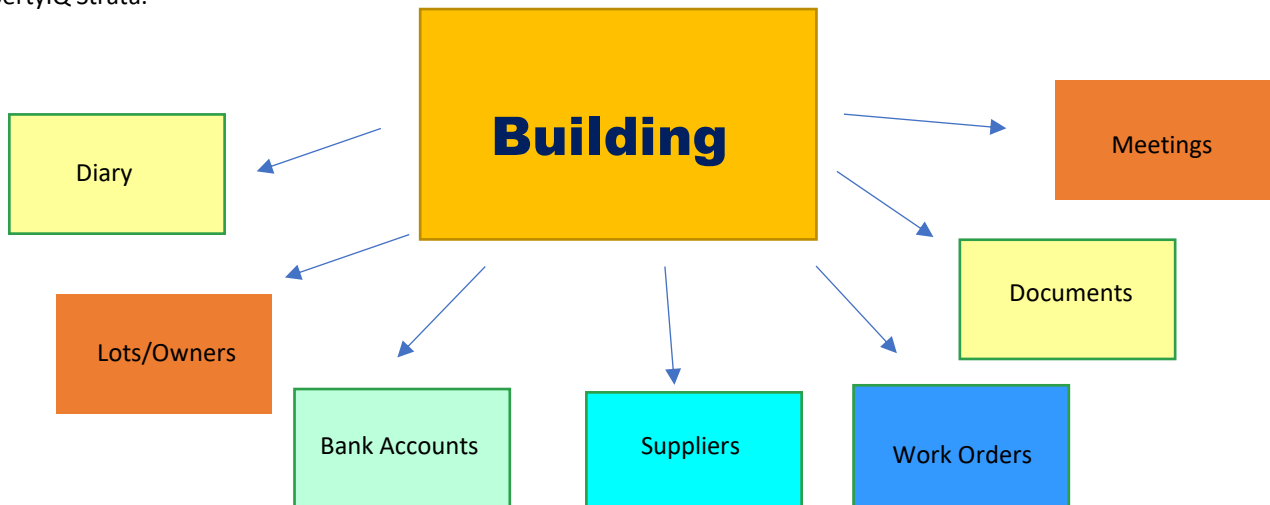
Quick guide to adding a building - Queensland

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INTRODUCTION TO BUILDINGS

The buildings section stores all the information relating to each Strata Building. The buildings area interacts with all areas of PropertyIQ Strata.



This is where you can add, view and edit:

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

Dates – Important dates for the building such as AGM and financial year

Charges – your fixed and variable charges, including your management fee

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 –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 register, lot authorisations, contracts and funding proposals

Alerts – create and manage alerts for important events relating to the building

Work Orders – view and edit work orders for the building

Log of Changes – view a change log for the building

Opening Balances – enter and view the opening balances for a building

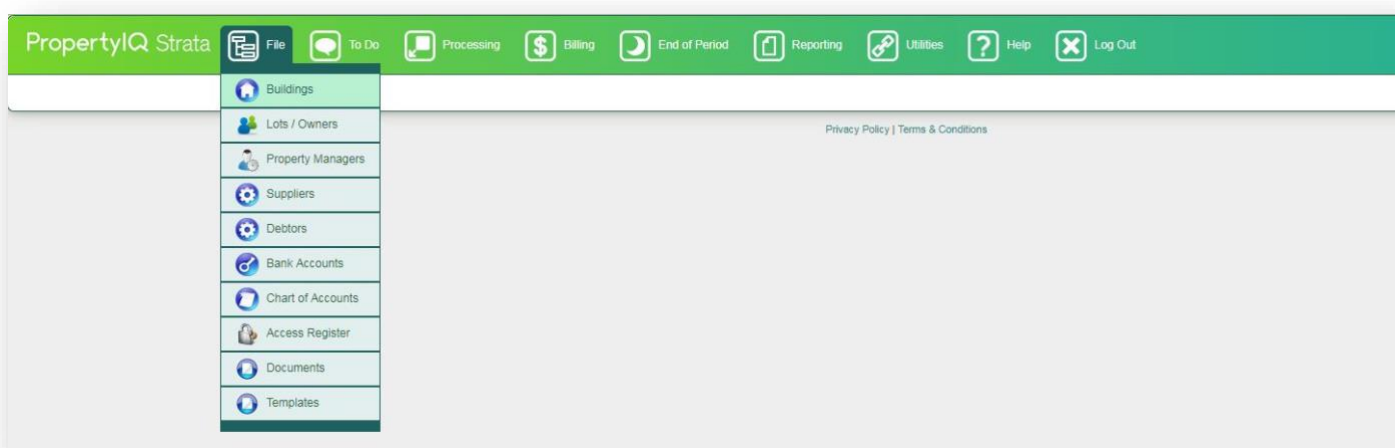
Schedules – create and manage contribution schedules for the building

Financial Reports – preview generate & save financial reports for the building

ADDING A NEW BUILDING



To add a new building go to  and select Buildings





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.

To get started, click **+Add** at the bottom of the screen

PropertyIQ Strata

FileTo DoProcessingBillingEnd of PeriodReportingUtilitiesLog Out

Currently Logged in as: ame
Role: Super Administrator
0.156.0.26/7/2019

Buildings										All	Active	InActive
C.T.S.	Building Name	Street No	Street Name	Suburb	State	Post Code	Manager	Lots	Folio			
693	Infinity Tower	11	James Street	PERTH	WA	8000	Anne Fluvia	2				
694	Skytower	12	Long Street	DEE WHY	NSW	2010	Jeremiah Fulstone	1			NSW BRANCH	
777	Southern Cross	7	Livingstone Road	SPRING HILL	QLD	4000	Anne Fluvia	5			QLD BRANCH	
901	WaveFront Building	20	Henry Street	BURLEIGH HEADS	QLD	4232	Bella Carstairs	5			QLD BRANCH	
999	Viewpoint	4	Hay Street	SYDNEY	NSW	2000	Rohit Sachdeva	1			NSW BRANCH	
BMC	Building Management Committee	17a	Brookdale Terrace	GLENBROOK	NSW		Anne Fluvia	3				
0009	Citistate Strata	149	John Street	SINGLETON	NSW	2330	Profeto Ladrillo	1			Support Team...	
0124	A4 Tech	3	Beverly Hills Street	MELBOURNE	VIC		Anne Fluvia	10			Support Team...	
0317	Brentwood	54	Mascot avenue	SYDNEY	NSW	2009	Anne Fluvia	1			Support Team...	
0810	The Benjamin	1	Benjamin Drive	JOLIMONT	WA	6125	Adrian Bolton	1				
1001	Vibe Shenton Park	259	Hammersley Road	SUBIACO	WA	6008	Anne Fluvia	10			Support Team...	
1002	The Cantleer	218	Carrington Street	MOUNT CLAREMONT	WA	6002	Bella Carstairs	1				
1005	Cranley Shores	543	Remington Road	MAVSON LAKES	SA	6100	Anne Fluvia	1				
1008	Jordan Mews	1	Jordan Boulevard	FLEMINGTON	VIC	3125	Anne Fluvia	5				
1288	Bankisia Gardens	59	Albert Crescent	BURWOOD	NSW	2014	Adrian Bolton	4			Group B Folio	
2121	Shangri La	21	MacDonald Street	ANGELES	NSW	2200	Raymond	2			Support Team...	
2195	Roberts Ridge	1	George Street	BRISBANE	QLD	4000	Anne Fluvia	4				
4343	The Yarra	15	Claredon Road	YARRA VALE	VIC	3042	Anne Fluvia	6			VIC BRANCH	

0 selected

Show Legend

Export+ AddView

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 that state
2. Enter the CTS 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 usual 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 Queensland 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. Select the module here – small, standard, commercial, accommodation or 2 lot scheme
10. Select the the type here - Building Format Plan (BFP) or Standard Format Plan (SFP)
11. Enter the total units of entitlement for the building
12. Enter the total interest entitlements for the building
13. The building is *active* by default. You can untick to make the building inactive if you no longer manage it
14. *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
15. 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.
16. 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. building. 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
17. Enter the building address details here
18. A building name is optional
19. Enter Plan, Parish and County
20. 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

C.T.S.*

4356

2

Manager*

Anne Fluva

3

Folio*

QLD BRANCH

4

5

Building Type*

Strata

6

Building Sub Type*

Residential

7

Building Class

High Rise

8

Module

Standard

9

Type

SFP

10

Total UOE*

120

11

Total Int Ent*

120

12

Active

☒

13

Debt Collection

☒

14

All Inclusive Fees

☐

15

Payment Plan

☒

16

Address

Street No

7

Street Name*

Mariners Drive

Address 2

17

Suburb

TOWNSVILLE

18

State*

QLD

1

P/Code

4165

Plan

234

Parish

Magnetic

19

County

Strathvern

Payment Plan Statement

20

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

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 Account

Name Morada Place
BSB 182-222
Account No 583544
Balance \$0.00
Last Rec Date
Account* Click on the search icon to start your search
Auto Associate Levy Receipts ☒
Reserve Funds ☒
Balance Limit \$500.00

Bank Accounts

Account Na...	BSB	Account No	Admin Bala...	Sinking Bala...	Balance
mora		583544			
<input checked="" type="checkbox"/> 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 Select to attach the bank account to the building.

+ Add View ☒ Select X Close

DATES TAB

The Dates Tab is where you enter the important dates for the building.

You can save your building without all tabs being complete but you will not be able to save it without entering a Financial Year, Levy Start year and levy frequency.

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 the management of the building is lost at a later date, you can record the date here
12. You can add custom dates here. These will appear as reminders on your Diary

Building

C.T.S.* 4356

Manager* Anne Fluva

Folio* Support Team Training

Building Type* Strata

Building Sub Type* Residential

Building Class High Rise

Module Standard

Type None

Total UOE* 120

Total Int Ent* 120

Active ☒ **All Inclusive Fees** ☐

Debt Collection ☒ **Payment Plan** ☐

Address

Street No 7 **Street Name*** Mariners Drive

Address 2

Suburb TOWNSVILLE **State*** QLD

Building Name The Mariner **P/Code** 4165

Plan 234 **Parish** Magnetic **County** Strathvern

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

Fin Year* 01/05/2018

Next AGM 15/05/2019

First AGM 03/05/2016

Last AGM 23/05/2018

Levy Year Start* 01/05/2018

Levy Frequency* Quarterly

Preissue None

Date Registered 13/08/2015

Date Built 02/04/2015

Date Acquired 04/06/2018

Date Resigned

Custom Dates

Description	Date	Type
+ Add Custom Date		

Save **Cancel**

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