

PropertyIQ™

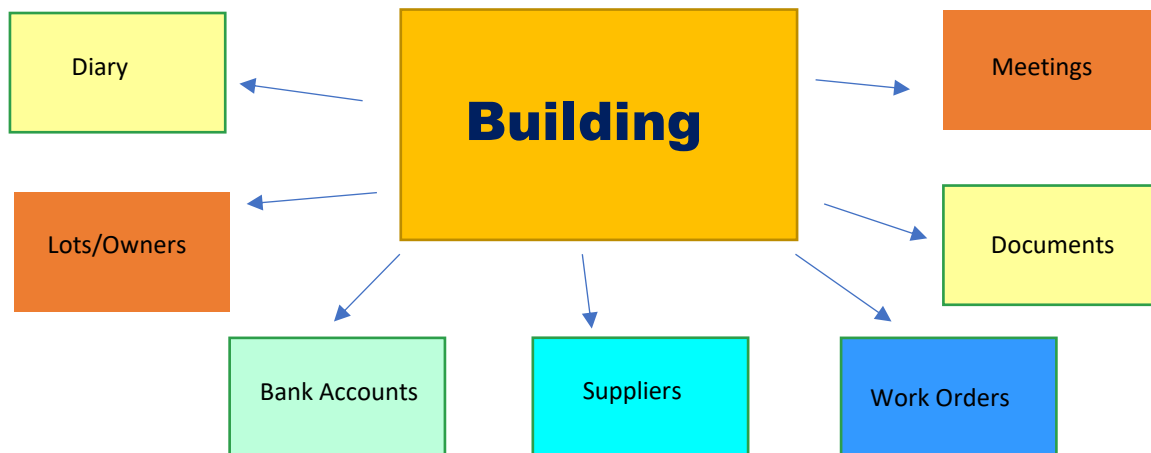
Quick guide to adding a building - Victoria

TABLE OF CONTENTS

Introduction to Buildings	0
Quick guide to Adding a new building	1
Building Details	2
Attaching a Bank Account	4
Dates tab	5

INTRODUCTION TO BUILDINGS

The buildings section stores all the information relating to each building. The building card 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

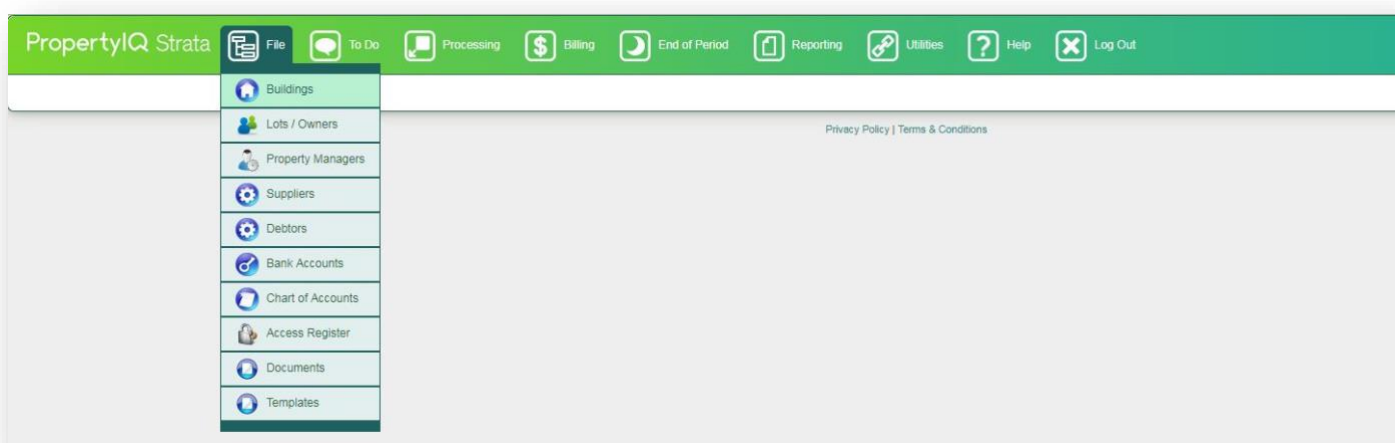
Work Orders – view and edit work orders for the building

Log of Changes – view a change log for the building

ADDING A NEW BUILDING



To add a new building go to  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, select **+Add** at the bottom of the screen

PropertyIQ Strata

File To Do Processing Billing End of Period Reporting Utilities Log Out

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

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 Fluva	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 Fluva	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 Fluva	3	
0009	Cliffdale Strata	149	John Street	SINGLETON	NSW	2330	Profeto Ladrillo	1	Support Team...
0124	A4 Tech	3	Beverly Hills Street	MELBOURNE	VIC		Anne Fluva	10	Support Team...
0317	Brentwood	54	Mascot avenue	SYDNEY	NSW	2009	Anne Fluva	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 Fluva	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 Fluva	1	
1008	Jordan Mews	1	Jordan Boulevard	FLEMINGTON	VIC	3125	Anne Fluva	5	
1288	Bankasia 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 Fluva	4	
4343	The Yarra	15	Clarendon Road	YARRA VALE	VIC	3042	Anne Fluva	6	VIC BRANCH

0 selected

Show Legend

Export + Add View

BUILDING DETAILS



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

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 OC 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 Victoria. 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 liability for the building
10. Enter the total units of entitlement for the building
11. The building is *active* by default. You can untick to make the building inactive if you no longer manage it
12. *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

13. 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.
14. 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
15. Enter the building address details here
16. A building name is optional
17. 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

O/Corp* 6143 2

Manager* Training Manager 3

Folio* VIC BRANCH 4 5

Building Type* Strata 6

Building Sub Type* Residential 7

Building Class High Rise 8

Total UOL* 140 9

Total UOE* 140 10

Active ☒ 11 **All Inclusive Fees** ☐ 13

Debt Collection ☒ 12 **Payment Plan** ☒ 14

Address

Street No 838 **Street Name*** Bourke Street 15

Address 2

Suburb MELBOURNE **State*** VIC 1

Building Name Yarra Gardens 16 **P/Code** 3008

Payment Plan Statement 17

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

▶ Bank Account	▶ Owner Interest
▶ Tax Settings	▶ Fee 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 ☐

Settings Dates Charges Info Fil

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
Debit Account

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.

+ Add View Select Close

DATES TAB

The dates tab is where you enter the important dates for the building.

1. Enter the date the current financial year for the building began (required)
2. Enter the next AGM date (optional)
3. Enter the date of the building's first AGM (optional)
4. Enter the date of the building's last AGM (optional)
5. Enter the building's Fee year start date (required)
6. Select the Fee frequency. Use the dropdown list to select how frequently you want to generate fee instalments
7. Choose the number of pre-issue instalments you want to generate. For detailed information about pre-issue instalments, see the manual "Budgets"
8. Enter the date the plan was originally registered (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 enter the date the management was resigned here. (You will also need to untick the building as Active once you have completed the closing off process)

Building

O/Corp* 6143

Manager* Training Manager

Folio* VIC BRANCH

Building Type* Strata

Building Sub Type* Residential

Building Class High Rise

Total UOL* 140

Total UOE* 140

Active ☒ **All Inclusive Fees** ☐

Debt Collection ☒ **Payment Plan** ☐

Address

Street No 838 **Street Name*** Bourke Street

Address 2

Suburb MELBOURNE **State*** VIC

Building Name Yarra Gardens **P/Code** 3008

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

Fin Year* 01/01/2018 1

Next AGM 12/01/2018 2

First AGM 18/11/2015 3

Last AGM 02/03/2017 4

Fee Year Start* 01/02/2018 5

Fee Frequency* Quarterly 6

Preissue 1 7

Date Registered 01/10/2015 8

Date Built 01/07/2015 9

Date Acquired 24/10/2017 10

Date Resigned 11

Custom Dates

Description	Date	Type
Tentative mee	01/10/2017	meeting re 13

+ Add Custom Date 12

Remove

Save Cancel