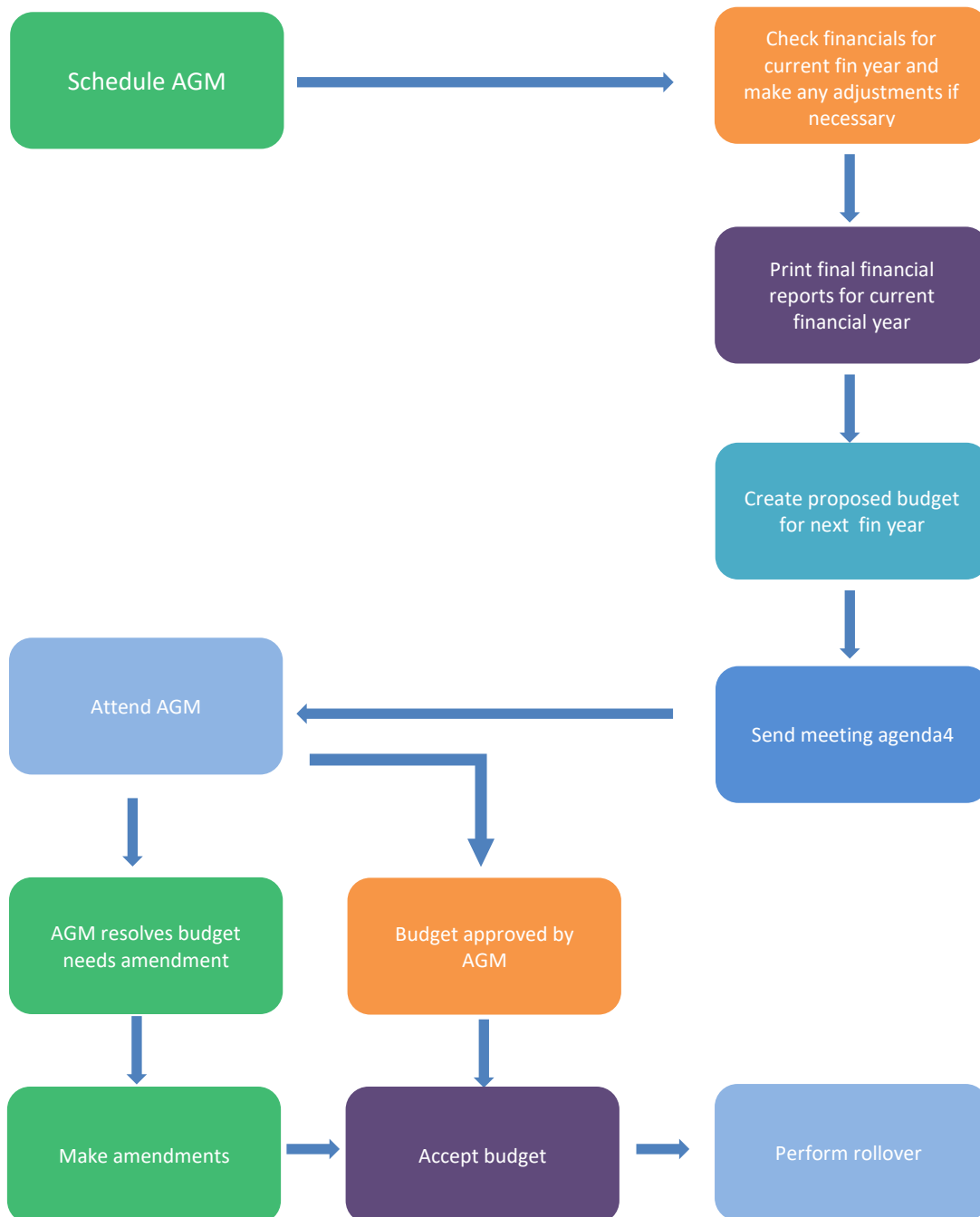


PropertyIQ™

Building year end process workflow



1. The First step is to schedule the AGM. See the Manual “Meetings” for full details on scheduling meetings
2. Check the current year’s financials. In particular check that items have been allocated to the correct chart of accounts code. Print the final financial reports. See the manual “Financial Reports” for full details
3. Prepare a proposed budget for the next financial year. You can use the current financial year’s budget as a guide. See the manual “Setting budgets and striking levies” for full details. Print the proposed budget.
4. Send the meeting notices, together with the final financial reports and proposed budget, to the lot owners. For full details, see the manual “Meetings”
5. Conduct the AGM
6. At the AGM, the meeting may decide to accept the proposed budget. If this is the case, print the accepted budget report and then accept the budget and strike the levies.

If the meeting decides that the proposed budget needs to be amended, go back to the proposed budget and make the amendments. Print the accepted budget report and then accept the new proposed budget and strike the levies.

7. Perform the building year end rollover. See the manual “Building Year End” for full details.