



## Buildings – Info tab

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## INFO TAB

The Info tab holds all the information about committee members, preferred tradespeople, insurance policies, investment accounts and precinct/community associations or other entities that this building is a part of.

## COMMITTEE

1. This is where you record all the members of the building's committee or council. Click on the white arrow to open
2. The screen defaults to view active committee members but you can click on the tabs to switch your view to all, appointed, active or resigned
3. The committee member's details show here
4. Click in the boxes to select individual committee members or click on the top line to select them all
5. You can record any committee spending limits here. This does not affect any other part of PropertyIQ, it is just for your information
6. Once you have selected at least one committee member on the screen, the email button will no longer be greyed out and you can click to email the selected members. Clicking on the *Email* button opens your email program and automatically inputs the selected members as recipients. NOTE: Emails sent by this method are not saved in PropertyIQ and committee member will be able to see each email address.
7. Once you have selected at least one committee member on the screen, the *Merge Committee Member* button will no longer be greyed out and you can click to email the selected members. See [below](#) for mail merging instructions
8. Once you have selected at least one committee member on the screen, the *Mailing Labels* button will no longer be greyed out and you can click to create mailing labels for the selected members. This creates a job in the mailing labels centre for you to print later. For full details on mailing labels, see the manual "Mailing Labels"
9. If you are subscribed to the SMS service and you have selected at least one committee member on the screen, the *Bulk SMS* button will no longer be greyed out and you can click to bulk SMS the selected members.
10. Click the *+Add* button to add a new committee member. See instruction [below](#)
11. Click *View* to view an individual committee member's card

**Building**

**C.T.S.\*** 270976  
**Manager\*** Anne Fluva  
**Folio\*** QLD Branch  
**Building Type\*** Strata  
**Building Sub Type\*** Residential  
**Building Class**  
**Module** Accommodation  
**Type** Mixed  
**Total UOE\*** 200  
**Total Int Ent\*** 200  
**Active** ☒ **All Inclusive Fees** ☐  
**Debt Collection** ☒ **Payment Plan** ☐

**Address**  
**Street No** 63 **Street Name\*** Cavill Avenue  
**Address 2**  
**Suburb** SURFERS PARADISE **State\*** QLD  
**Building Name** Moorings on Cavill **P/Code** 4217  
**Plan** 270976 **Parish** SURFERS PARADISE **County**

**Committee**

	Position	Name	Lot	Appointed	Resigned	Status	Contact	Email	Type
<input checked="" type="checkbox"/>		Rocco Silvester	1	1/1/2017		Active	0414 332 332	fayeg@propertyiq.com.au	
<input checked="" type="checkbox"/>		Celia Chan	4	1/6/2017		Active		mystratacustomers@gmail.com	
<input checked="" type="checkbox"/>	Secretary	Costa Gianapolous	5	2/8/2017		Active	0415453 456	costagian@gmail.com	
<input type="checkbox"/>	Secretary	Celia Chan	4	21/8/2017		Active		mystratacustomers@gmail.com	

**Spending Limits**

**Committee Expenditure** \$500.00  
**Major Spending** \$2,000.00  
**Date of Resolution** 06/06/2017

**Buttons:** Email, Merge Committee Letter, Add Mailing Labels, Bulk SMS, + Add, View

**Tradespeople**  
**Insurance**  
**Investment Accounts**  
**Community Association / Precinct Association / Building Management Committee**

**Opening Balances** **Schedules** **Financial Reports** **Edit** **Done**

## MAIL MERGING TO COMMITTEE MEMBERS

1. Click *Merge Committee Letter* to get started
2. Click on the search icon to find the template you want to merge to
3. Committee members with email selected as their delivery method will be emailed – Enter an email subject line here
4. Tick here if you want to override committee member delivery methods and create a PDF that you can print and post for all the selected committee members.
5. The name of each recipient shows here, and their delivery method
6. Click on the attachments accordion to open it
7. Click here to add a document
8. Click close to exit the mail merge process

Custom Template Merge

Current Selected Template:

Template Type:

Existing Template

Email Subject:

Committee Appointment

Override Email To Post

Template will be sent to 3 recipients

S/Plan	Lot	Name	Delivery
270976	4	Celia Chan	Email
270976	5	Costa Gianapolous	Email
270976	4	Celia Chan	Email

Attachments

Name	Date	Size

Add Document

Remove Document

Customise

Preview

Generate

Close

Street Name\*

Cavill Avenue

State\*

QLD

P/Code

4217

County

Documents

Registers

Alerts

Work Orders

Insurance Claims

Log of Changes

All

Appointed

Active

Resigned

	Lot	Appointed	Resigned	Status	Contact	Email	Type
	1	1/1/2017		Active	0414 332 332	fayeg@propertyiq.com.au	
	4	1/6/2017		Active		mystratacustomers@gmail.com	
	5	2/8/2017		Active	0415453 456	costagian@gmail.com	
	4	21/8/2017		Active		mystratacustomers@gmail.com	

Email

Merge Committee Letter

Add Mailing Labels

Bulk SMS

Add

View

Spending Limits

Committee Expenditure

\$500.00

Major Spending

\$2,000.00

Date of Resolution

06/06/2017

Tradespeople

Insurance

Investment Accounts

Community Association / Precinct Association / Building Management Committee

Opening Balances

Schedules

Financial Reports

Edit

Done

## Adding a document to the Mail Merge

1. Click on *Add Documents*
2. The documents show on the screen
3. Click on the document, to highlight it, and then double click to select it
4. Click on the *Document Entry* button to add a document that is on your computer, but not saved in PropertyIQ. This will also add the document to the building's document card
5. You can also remove a document that you have previously added, by clicking on the *Remove Document* button

The screenshot displays the 'Custom Template Merge' sidebar on the left and the 'Documents' list in the center. The sidebar includes a 'Current Selected Template' dropdown, 'Template Type' (Existing Template), 'Email Subject' (Committee Appointment), and 'Override Email To Post' (Template will be sent to 3 recipients). It also shows a table of recipients with columns S/Plan, Lot, and Name. The 'Attachments' section is empty. The 'Documents' list is a table with columns: Date, Name, S/Plan, Building Name, Street Name, Lot, U..., Supplier, Document..., and On P... The list contains various documents, including 'Electricity Utility Notice' and 'Account Ledger Report.pdf'. The 'Account Ledger Report.pdf' is highlighted with a blue row. The 'Add Document' button is circled with a red 1, and the 'Remove Document' button is circled with a red 5. A red arrow points from the 'Add Document' button to the 'Account Ledger Report.pdf' document, which is circled with a red 3. The 'Document Entry' button is circled with a red 4. The 'Documents' list is titled 'Documents' with a red 4 next to the '+ Document Entry' button. The 'Attachments' section is titled 'Attachments' with a red 2 next to the 'Name' column header. The 'Documents' list is titled 'Documents' with a red 4 next to the '+ Document Entry' button. The 'Attachments' section is titled 'Attachments' with a red 2 next to the 'Name' column header.

S/Plan	Lot	Name
270976	4	Celia Chan
270976	5	Costa Gianapolous
270976	4	Celia Chan

Date	Name	S/Plan	Building Name	Street Name	Lot	U...	Supplier	Document ...	On P...
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	10	10		Electricity ...	✗
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	33	33		Electricity ...	✗
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	44	44		Electricity ...	✗
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	45	45		Electricity ...	✗
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	76	76		Electricity ...	✗
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	101	101		Electricity ...	✗
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	102	102		Electricity ...	✗
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	0	0		Electricity ...	✗
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	0	0		Electricity ...	✗
31/8/...	Electricity Utility Notice 01-07-2017 to 14-0...	689	Building 689	Pye	1	1		Electricity ...	✗
28/8/...	Account Ledger Report.pdf	270976	Moorings on Cavill	Cavill Avenue				Financial	✗
25/8/...	Storage area keys.PNG							Access Re...	✗
25/8/...	Debtor Invoice 2017-08-25.pdf	888777	Hornsby Towers	Florence					✗
25/8/...	Financial Report Final 25-08-2016 to 24-08...	688		Pye Street				Financial	✗
25/8/...	Financial Report Final 25-08-2016 to 24-08...	688		Pye Street				Financial	✗
25/8/...	The Bachelor Pad 2017 Proposed Budget ...	1	The Bachelor Pad	Hollywood Drive				Budget Re...	✗
25/8/...	Detailed Attendance Report.pdf	76567	Roman Architecture	Roberts Road				Meeting R...	✗
25/8/...	Attendance Report.pdf	76567	Roman Architecture	Roberts Road				Meeting R...	✗

## SENDING A BULK SMS TO COMMITTEE MEMBERS

If you subscribe to the SMS service, you can bulk SMS Committee members

1. Select the committee members you want to SMS and click on the *Bulk SMS* button
2. The recipients and their mobile numbers show here
3. Enter your message here.
4. Your standard signature is set up in the settings menu - SMS tab. For more detail, see the manual "SMS"
5. The character count shows here
6. The estimated cost per message shows here. Messages are charged in 160 character blocks. If your message is up to 160 characters, it will count as one message for billing purposes, if more than 160 it will count as two and so on.
7. The number of messages per recipient shows here. As this message is more than 160 characters, two messages per recipient will be charged.
8. The total estimated cost of the bulk message shows here
9. Click *Send Bulk Message* when you are ready to send. The SMS will be recorded on each committee member's card
10. Click *Close* to exit the bulk SMS

**Building**

S/Plan\* 888777

Manager\* Anne Fluva

Folio\* Support Team Training

Building Type\* Strata

Building Sub Type\* Residential

Building Class

Total UOE\* 220

Active ☒ All Inclusive Fees ☐

Debt Collection ☒ Payment Plan ☒

Settings Dates Charges Info Financials

**Send Bulk SMS**

Message will be sent to 8 recipients

Name	Mobile
Franca Swanden	0423 324 343
Sally Bennett	0432 343 434
Bailey Brown	0412 544 344
Carolyn Samuels	0422 343 434
Ellery Borenson	0414 223 554

Message\* Hi everyone, reminder that the strata committee meeting is on tonight at 7 pm in our offices - 224 Pacific Highway, Wailana. Please email me if you cant attend .

+ Signature My Strata Co

Length: 174

# Of Messages Per Recipient: 2

Estimated Cost Per Recipient: \$0.40

Total Estimated Cost: \$3.20

Send Bulk Message Close

**Committee**

Position	Name	Lot	Appointed	Resigned	Active	Mobile	Email	Type
Chairperson	Franca Swanden	1	1/7/2016		Active	0423 324 343	fayeg@propertyiq.com.au	Rep
Secretary	Sally Bennett	4	1/7/2016		Active	0432 343 434	sallybenetti@gmail.com	Rep
Treasurer	Bailey Brown	8	1/7/2016		Active	0412 544 344	mystatcustomers@gmail.com	Rep
Chairperson	Carolyn Samuels	12	8/11/2017		Active	0422 343 434	cs@gmail.com	
	Ellery Borenson	3	19/12/2017		Active	0414 223 554	elleryb@gmail.com	
Manager	Nicole Bauer	30	15/1/2018		Active	0422 894 764		
Chairperson	Carolyn Samuels	12	25/7/2018		Active	0422 343 434		

Spending Limits

Committee Expenditure \$200.00

Major Spending \$10,000.00

Date of Resolution 01/11/2017

Email Merge Committee Letter Add Mailing Labels Bulk SMS + Add View

## ADDING & EDITING COMMITTEE MEMBERS

To add a new committee/council member, click the **+Add** button from the Committee screen.



If the committee/council member is not a lot owner, you can skip Steps 1-3 below and enter their details directly onto the committee/council member's card.

Committee Member

1

Lot:

1/1 Mr Smith

View Lot

Sync With Lot Owner

4

Salutation

Mr

5

Name\*

Mr Smith

6

Position

Secretary

7

Appointed\*

07/05/2025

8

Schedule

9

Resignation

10

Nominator

11

Type

☐ Representative
 ☐ Sub Representative
 ☒ External Approver

12

Recipient of

☒ Financial Reports
 ☐ Work Order
 ☐ Insurance Claim

Address

13

Address

1 Address Street

Suburb

SYDNEY

State

NSW

Post Code

2000

Contact Details

14

Home

Fax

Work

Mobile

0400 000 001

Email\*

email@email.com

Delivery method

☒ Email
 ☐ Post

16

Note

17

SMS

18

Log of Changes

From

07/06/2025

To

07/07/2025

User

All Users

Action	User	Time
update	Nicki Scrivener	07/07/2025 - 4:58 pm
Column: Position	Value Before: chairperson	Value After: secretary
Column: Mobile	Value Before: 0400 000 000	Value After: 0400 000 001
creation	Nicki Scrivener	07/07/2025 - 4:58 pm

19

Save

Cancel

- Use the search icon to find and select a lot owner if the committee/council member is a lot owner.  
If the committee/council member is linked to a lot, you can also click the page icon to open the lot card.
- If the committee member is linked to a lot, you can view the lot here.
- IMPORTANT!** If you select *Sync with lot owner* the information here comes from the lot card; changes and updates to the lot owner card will automatically update the committee member card.
- Enter a salutation for any correspondence.
- The committee member's name shows here.
- Select their position from the dropdown list.
- Enter the date this person was appointed.
- If this is a multi-OC building and this member is a member for a single-OC, select the schedule.
- If the person resigns from the committee, enter the date of their resignation here. Once a date is entered, the member will be marked as 'inactive'.
- Enter the nominator of the member (if applicable).
- Select the type of member where applicable:
  - Select if they are a representative of the lot
  - Select if they are a sub-representative of the lot

- c. Select if they have authority to approve supplier payments that need committee/council approval. If this is ticked, when you are processing supplier transactions and you select that the invoice requires external approval, they will automatically be sent an invoice approval request.
- 12.** Select if committee/council member receives copies of documents where applicable:
  - a. Select if they receive a copy of financial reports when generating in bulk from the Reporting menu
  - b. Select if they receive a copy of work orders when you send them to suppliers
  - c. Select if they receive a copy of insurance claims when you send them to insurers.
- 13.** If you don't sync with the lot card, you can update any of the address details for this person here.
- 14.** If you don't sync with the lot card, you can update any of the contact details for this person here.
- 15.** Tick their preferred delivery method for committee related correspondence. The options are email or post.
- 16.** You can record notes here that relate to the person's committee/council member role.
- 17.** *[Visible once created and for existing members]* If you are using the SMS function, you can click here to SMS the committee member. Any SMS you have sent will also be recorded here.
- 18.** *[Visible once created and for existing members]* The creation and any changes to the committee/council member will be recorded under the Log of Changes tab here.
- 19.** Click *Save* when done.

## BUILDING INFORMATION

You can record important building information under *Building>Info tab>Building Information* accordion. Any changes to this screen will be reflected in the building's Log of Changes tab.

**NSW StrataHub:** Capture the building information required for StrataHub reporting, including information for multiple building structures reported under the scheme (strata plan).

The screenshot shows the 'Building Information' form. At the top is a navigation bar with tabs: Settings, Dates, Charges, Info, Financials, Budget, Notes, Documents, Registers, Alerts, Work Orders, Insurance Claims, Emails, and Log of Changes. Below this is a sidebar with 'Committee' and 'Building Information' (selected). The main form area is divided into sections: 'Building Information' (containing lot counts, insurance value, AGM date, and StrataHub settings), 'Insurance' (containing insurance replacement value and AGM date), and 'Buildings' (containing building details, NABERS ratings, and a table for multiple buildings). Numbered callouts 1 through 17 point to specific fields and sections.

1. Click on *Building Information* accordion to open it.
2. Here you'll see the total number of lots in the building (same as building lot count).
3. In this section you can record the breakdown of lots depending on use e.g. number of lots that are residential, commercial, etc.
4. View the building's insurance replacement value here.
  - a. Read only field. Calculated based on the sum insured amounts for all **active** insurance policies of the building, where coverage type is **Building/Common Area**.
5. View the last AGM date of the building here.
  - a. This is a shared field with 'Last AGM Date' under the buildings Dates tab. If there's a date in 'Last AGM Date' field under Dates tab, it will be pre-populated here. If you update one, it automatically updates the other.
6. View the balance of the Capital Works/Sinking/Maintenance/Reserve Fund as at last financial year.
  - a. Read only field. Calculated based on the sum of Capital/Sinking balances of all bank accounts as at the last day of the building's previous financial year. If no previous financial years, the opening balance date will be used for calculations.
7. Here you select if a Strata renewal committee has been established (relevant for **NSW buildings**).
8. Here you can enter the establishment date if a Strata renewal committee was established. This date field is only visible if you've ticked the strata renewal committee option.



9. StrataHub Settings are only visible for **NSW buildings** AND when the NSW StrataHub Integration setting has been enabled. If you aren't seeing these settings and should be, contact us at [support@propertyiq.com.au](mailto:support@propertyiq.com.au).
  - a. Here you can select if the Chairperson can update StrataHub records.
  - b. Here you can select if you want to exclude this building from StrataHub reporting.
10. Here you can enter the Building Reference.
  - a. The default value for Building #1 is [Street Number]+[Street Name], separated by a space.
  - b. There's a maximum of 100 characters and it cannot contain invalid special characters.
  - c. For **NSW buildings**, the reference is mandatory and must be unique across all sub-buildings within the same building – see Step 16 for adding sub-buildings.
11. Here you can select if it's a Class 2 building (Only visible for **NSW buildings**).
12. Here you can enter the number of storeys above ground. This field is mandatory if 'Class 2 building' is ticked.
13. Here you can enter the Annual Fire Safety Statement date.
14. Here you can enter the Interim Occupation Certificate date.
15. Here you can enter the Final Occupation Certificate date.
16. Here you can select if the building has a NABERS rating and enter the ratings where applicable.
  - a. There are individual NABERS ratings for Energy, Indoor, Waste and Water.
  - b. When 'Has NABERS rating' is ticked, the individual ratings are mandatory. Rating options are 0-6 in 0.5 increments.
17. Multi-buildings – For multiple building structures reported under the scheme (strata plan), you can add the additional sub-buildings and capture the above information for each sub-building. To add more sub-buildings, click the *+Add Building* button.

You can record the building's preferred tradespeople here.



You will still be able to select any tradespeople you want when creating a work order, as this area is just for your information.

1. Make sure you are *not* in edit mode on the building card and click here to get started
2. Enter some key letters to search for the tradesperson you want
3. *Select* to add them

You can remove a preferred tradesperson

1. Highlight the tradesperson you want to remove
2. Click *Remove Tradesperson* to remove them from the list. This will not remove their supplier record from PropertyIQ.

You can print a list of all preferred tradespeople for the building by clicking on the *Print* button.

## INSURANCE

You can record all insurance policies relating to the building here. Recording your insurance policies here creates entries in your diary so you won't miss any policies expiring. This information is also utilised when you process an insurance claim. For full details about insurance claims, see the manual "Insurance Claims"

1. Any existing insurance policies will show here. Click on the policy to highlight it, and then double click to open it
2. You can enter the latest insurance valuation amount and the date of the latest Insurance Valuation here
3. You can add insurance valuer suppliers here - click on the search icon to search for a supplier.
4. +Add button to add a new insurance policy or
5. View button to view an insurance policy that you have already highlighted on the screen

**Building**

**S/Corp\*** 4345  
**Manager\*** Anne Fluva  
**Folio\***   
**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 **PICode** 5232

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

**Committee**  
**Tradespeople**  
**Insurance**

Policy Number	Insurance Company	Type	Renewal Date	Premium
43543555	CGU Insurance		12/3/2017	\$5,000.00

**Insurance Valuation** \$3,000,000.00 **Valuer** ABC Valuers   
**Valuation Date** 01/05/2017

**Valuer Details**  
**Name** ABC Valuers **Phone** 102 76676777  
**Address** 101 High Street **Phone** 202 76676988  
 SYDNEY NSW 2000 **Mobile** 042876543  
**Email** john@abcvaluer.com

**+ Add** **View**

**Investment Accounts**  
**Community Association / Precinct Association / Building Management Committee**

**Save** **Cancel**

## ADDING AN INSURANCE VALUER

1. Use the search icon to search for a supplier
2. Enter some key letters in any of the empty boxes on the top line to refine your search
3. Click on the supplier you want to highlight them and then double click to select
4. You can also add, view, edit and select suppliers here. For full details, see the Manual "Suppliers Screen"

The screenshot shows the 'Building' window on the left and the 'Suppliers' window on the right. The 'Building' window has tabs for Settings, Dates, Charges, Info, Financials, Budget, Notes, Documents, Registers, and Alerts. The 'Insurance' tab is selected, showing a table with columns: Policy Number, Insurance Company, and Type. Below the table, there is a section for 'Insurance Valuation' with a dropdown menu for 'Value' and a 'Valuation Date' field. A purple arrow points from the 'Value' dropdown to the 'Suppliers' window. The 'Suppliers' window has a table with columns: Supplier Name, Supplier Co., Balance, Type, Suburb, Phone, Mobile, ABN, and Compliance. The table lists several suppliers, including 'ABC Valuers'. A purple box highlights the '+ Add', '+ View', '+ Edit', '+ Select', and '+ Close' buttons at the bottom of the 'Suppliers' window.

## ADDING AN INSURANCE POLICY

+Add to get started

The screenshot shows the 'Building' window with the 'Insurance' tab selected. The table shows one insurance policy with columns: Policy Number, Insurance Company, Type, Renewal Date, and Premium. Below the table, there is a section for 'Insurance Valuation' with a dropdown menu for 'Value' and a 'Valuation Date' field. A purple box highlights the '+ Add' button at the bottom right of the 'Insurance' tab.

1. Enter the policy number here
2. If you have an insurance company contact, enter their name here
3. Enter the start date and end dates of the policy here
4. Enter the date you want to manage the renewal here – enter this well ahead of the actual expiry as this creates a diary reminder for the strata manager and gives you time to ensure the policy doesn't expire
5. The policy is active by default, but you can inactivate it if you need to
6. Use the search icon to search for an insurer.
7. Click on an insurer name to highlight them then double click to select them
8. **+Add** button to add a new Insurer.
9. Once you have highlighted an Insurer on the screen, **View** to view their details
10. Once you have highlighted an Insurer on the screen, **Edit** to edit their details
11. Click on an insurer name and then **Select** to attach that insurer to the policy



When adding an insurer, make sure you enter an email address in the claims email section so insurance claims can be emailed to them.

Insurance Policy

Insurer Details

Policy Number

4345

Period From

15/08/2018

To

14/08/2019

Contact

Petrina Fenech

Active

☒

Renewal Date

15/07/2018

Insurer

\*

Insurance Company

Address

Suburb

State

Post Code

Broker

Insurance Broker

Address

Suburb

State

Post Code

Commission

Actual

\$0.00

Anticipated

\$0.00

Upload Policy Document

Select Policy Document

Insurance Policy Document

Upload Endorsement

Select Endorsement

Endorsement Document

Note

Premium Details

Premium

\$0.00

Date Paid

Amount Paid

\$0.00

Coverage Details

Add Cover

Save

Cancel

4

5

6

1

2

3

Insurers

All

Active

InActive

Company Name	Phone 1	Phone 2	Fax	Note
CGU Insurance	02 8569 4521	02 5468 6589	02 5426 8596	
AAMI				
Suncorp	0398765678			Note found on the...
Insurance Alliance				
CHU	1300 361 263		1300 361 269	

8

9

10

11

+ Add

View

Edit

Select

Close

+ Add

View

## BROKERS

Complete this section if you are using a broker.

1. Use the search icon to open the brokers list. This will show all existing brokers
2. Click to highlight a broker and click *View* to view that broker's details (or double click on the highlighted broker)
3. **+Add** to add a new broker
4. *View* to open and view an existing broker's details
5. *Edit* to edit the details of a broker
6. Click to highlight a broker and *Select* to add them to the insurance policy details (or double click on the highlighted broker)

**Insurance Policy**

Insurer Details  
Policy Number: 4345    Period From: 15/08/2018    To: 14/08/2019  
Contact: Petrina Fenech    Renewal Date: 15/07/2018  
Active: ☒

Insurer: CGU Insurance  
Insurance Company: CGU Insurance  
Address: 54 Cumberland Road  
Suburb: RICHMOND  
State: NSW  
Post Code: 4526  
Phone 1: 02 8569 4521  
Phone 2: 02 5468 6589  
Fax: 02 5426 8596  
Email: 1\_email@deadend.piq  
Claims Dept Email: 1\_claimsEmail@deadend.piq

Broker:  (1) →

Insurance Broker  
Address  
Suburb  
State  
Post Code  
Phone 1  
Phone 2  
Fax  
Email

Commission  
Actual: \$0.00    Anticipated: \$0.00

Upload Policy Document    Select Policy Document

Insurance Policy Document:  
Upload Endorsement    Select Endorsement

Endorsement Document:  
Note:

Premium Details  
Premium: \$0.00    Date Paid:   
Amount Paid: \$0.00

Coverage Details

**Insurance Brokers**

Broker Name	Phone 1	Phone 2	Fax	Note
Kinnane Insuranc...	03 5264 8569	03 9745 6523	03 9744 5264	(2)
Bennaris Insuran...				
Regina Holsworthy	1300 878 989			Note found on the...
Body Corporate B...				
CRM Brokers	1300 880 494		9225 9943	
Direct Insurance ...				

(3) (4) (5) (6)

1. Enter your actual insurance commission here.
2. Enter your anticipated commission here.
3. Click here to upload a new policy document. See section below – [uploading insurance documents](#)
4. Click here to attach a document to this policy that is already in PropertyIQ. See section below – [uploading insurance documents](#)
5. Click here to upload a new Insurance endorsement document/policy alteration document. See section below – [uploading insurance documents](#)
6. Click here to attach an endorsement document to this policy that you have already attached to PropertyIQ. See section below – [uploading insurance documents](#)
7. Enter the amount of the premium shown on the insurance policy documents here
8. Enter the date the premium was paid here
9. Enter the actual amount of premium paid here e.g. if you are paying in monthly instalments you can enter the amounts here.
10. **Add Cover** to add details of cover

Insurance Policy

Insurer Details

Policy Number\* 4335
Period From\* 01/08/2018
To\* 31/07/2019

Contact Lila Pertone
Renewal Date 01/07/2018

Active

Insurer: \*CGU Insurance

Insurance Company CGU Insurance
Phone 1 02 8569 4521
Address 54 Cumberland Road
Phone 2 02 5468 6589
Suburb RICHMOND
Fax 02 5426 8596
State NSW
Email 1\_email@deadend.piq
Post Code 4526
Claims Dept Email 1\_claimsEmail@deadend.piq

Broker: Kinnane Insurance Broke

Insurance Broker Kinnane Insurance Brokers
Phone 103 5264 8569
Address 762 The Plaza
Phone 203 9745 6523
Address Line 2
Fax 03 9744 5264
Address line 3
Email 1\_email@deadend.piq
Suburb FITZROY
State VIC
Post Code 3256

Commission

Actual: \$500.00
Anticipated: \$500.00

Upload Policy Document
Select Policy Document

Insurance Policy Document:

Upload Endorsement
Select Endorsement

Endorsement Document:

Note:

Premium Details

Premium \$25,000.00
Date Paid 16/07/2018

Amount Paid \$25,000.00

Coverage Details

Add Cover

Save
Cancel

## ADDING INSURANCE COVER

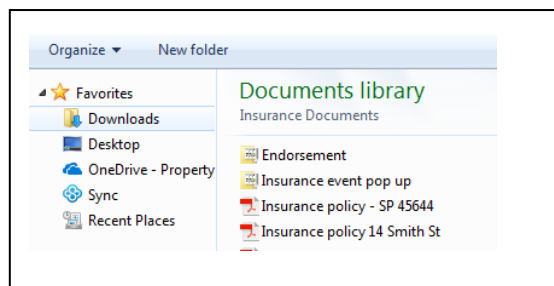
1. Choose the type of cover from the dropdown list
2. Enter the sum insured
3. Enter the amount of weekly premium payable (if paid weekly)
4. Enter the amount of excess payable if you make a claim
5. Enter any additional notes here
6. You can delete the cover here (This does not delete the whole policy, just this area of cover)
7. Save



You will not be able to process an insurance claim on a policy unless it has Building/Common property cover attached to it.

## UPLOADING INSURANCE DOCUMENTS

Click on *upload policy documents* or *upload endorsement* to attach a document that is saved on your computer but not yet uploaded into PropertyIQ. If you have already added the policy document or endorsement document to PropertyIQ, you can click *select policy document* to search for it.

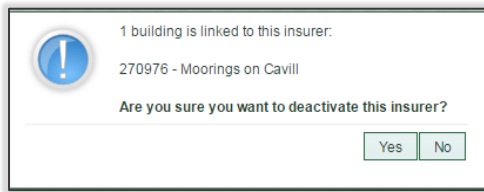




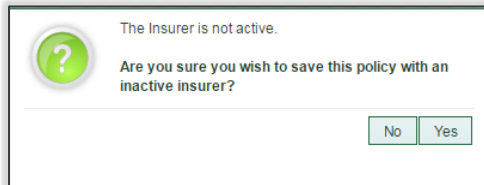
---

## NOTE ABOUT INACTIVE INSURERS

You can inactivate insurers, but to prevent you from activating insurers that are already attached to an insurance policy, you will receive this warning if you try to inactivate an insurer that is attached to any policies.



If you edit and then try to save an Insurance policy that is attached to an inactive insurer, you will receive the following warning:



## INVESTMENT ACCOUNTS

Some buildings have separate investment bank accounts, where they transfer some of the funds they don't need for immediate use to earn interest.

Click on **+Add Investment Account** to get started

1. **+Add Investment Account**
2. To search for an existing investment account, enter some key letters here to refine your search
3. **+Add** to add a new investment account. The permission to add or edit bank accounts is usually restricted to the roles of Administrator and Accounts, but roles may be customised in your company.
4. To view or edit the details of an account, highlight the bank account you are looking for and click **View**
5. To select a bank account, highlight the account you want and then click **Select** (or double click on the account you want to select)

**Building**

S/Plan\* 283423

Manager\* Training Manager

Folio\* NSW

Building Type\* Strata

Building Sub Type\* Residential

Building Class Townhouses

Total UOE\* 40

Active ☒ All Inclusive ☐

Address

Street No 29-31 Street Name\* Mile End Road

Address 2

Suburb ROUSE HILL

Building Name Morada Place

Settings Dates Charges Info Financials Budget Notes Documents Registers Alerts

Committee

Tradespeople

Insurance

Investment Accounts

Account Name	Account No.	BSB
+ Add Investment Account		

**Bank Accounts**

Account No.	BSB	Account No	Admin Balan...	Sinking Bala...	Balance
SP 16	182-222	784512963	\$2,515.00	\$0.00	\$2,515.00
Additional ac...	011-234	124576587	\$0.00	\$0.00	\$0.00
SP 73074 A...	182-222	434345444	\$20,000.00	\$30,000.00	\$50,000.00

+ Add View Select Close

## COMMUNITY ASSOCIATIONS, PRECINCT ASSOCIATIONS AND BUILDING MANAGEMENT COMMITTEES

These are the organisations that sit above an individual strata scheme (and usually incorporate a number of strata schemes.) The information entered here merges onto an information certificate. The building you manage may have to pay levies to these organisations for items that affect the whole of the precinct, for example swimming pool expenses for a pool that services a number of strata plans.

1. Select the type of association/committee you want to enter
2. Enter the name of the association/committee
3. Enter the address of the association/committee
4. Enter the date the association/committee levies were determined
5. Enter the date levies due to the association/committee are paid to
6. Enter the amount of any arrears owed to the association/committee
7. Enter any amounts that have been paid in credit (advance) to the association/committee
8. You can enter the details of any levies due here
9. Save

**Building**

S/Plan\* 283423  
 Manager\* Training Manager  
 Folio\* NSW  
 Building Type\* Strata  
 Building Sub Type\* Residential  
 Building Class Townhouses  
 Total UOE\* 40  
 Active ☒ All Inclusive ☐

Address  
 Street No 29-31 Street Name\* Mile End Road  
 Address 2  
 Suburb ROUSE HILL State\* NSW  
 Building Name Morada Place

**Building Management Committee**

Name of Building Management Committee\* Rouse Hill Residential Precinct  
 Address for service of notices PO Box 245 ROUSE HILL NSW 2155  
 Date Determined 01/10/2016 Paid To 01/03/2017  
 Current Arrears \$0.00 Current Credit \$400.00

Period From	Period To	Due Date	Admin	Capital Works

Save Cancel

**Building Management Committee**

Name of Building Management Committee\* Rouse Hill Residential Precinct  
 Address for service of notices PO Box 245 ROUSE HILL NSW 2155  
 Date Determined 01/10/2016 Paid To 01/03/2017  
 Current Arrears \$0.00 Current Credit \$400.00  
 Last Updated 30/01/2017 - 2:20 pm

Period From	Period To	Due Date	Admin	Capital Works
1/3/2017	1/6/2017	1/3/2017	\$5,000.00	\$3,000.00

## RELATED BUILDINGS

On the Building card>Info tab, the '*Related Buildings*' accordion allows you to link related buildings to each other and also record buildings that are managed by another strata/OC management company. For example, multi-OC, multi-tiered or layered schemes.

? **HINT for Victorian clients** – If you are using separate buildings for multiple OCs (unlimited and limited OCs) instead of using schedules in one building, you may want to link the buildings in PIQ to easily identify them as being part of a multi-OC.

### Using the *Related Buildings* area, you can:

- Link one or more buildings in PIQ using the *Add* button
  - Once buildings are linked together, they will form a group of related buildings.
  - A building can only be linked to one group of related buildings at a time.
  - When linking buildings, if you select a building that's part of a group of related buildings, all buildings in that group will be linked and shown in the *Related Buildings* accordion of the building you're currently viewing. Because of this, you can link or unlink a building from a group by going to **any** of the buildings in the group.
- Record one or more related buildings managed by another Strata/OC management company
  - Manually enter any other related building/s that are managed by another manager, including the manager's details for record purposes.
- View details of a related building in the grid
  - Details include SP/CTS/OC number, building name, total entitlements, total lots, main bank account balance and Tier (VIC only).
- Open the building card of a related building by double clicking on the row in the grid or using the *View* button
- Generate a related buildings report using the *Print* button
- Unlink a building using the *Remove* button
  - You can manually unlink a building at any time.
  - Unlinking a building will not just remove it from the building you're currently viewing but will also unlink it from the group of related buildings. For example, the unlinked building will no longer show in the *Related Buildings* accordion for any building in the group. Because of this, you can link or unlink a building from a group by going to **any** of the buildings in the group.
  - When a linked building is made inactive, it'll be removed automatically from the group of related buildings and will no longer appear in the *Related Buildings* accordion.

### Permissions

- You'll need existing permissions of *Building>View* and *Building>Edit* to view and edit details within the *Related Buildings* accordion. Data access restrictions for Folio and Manager are also be applied when viewing details and linking buildings.

**IMPORTANT NOTE:** The linking of buildings is for information purposes only. If a change is made to building details for a building that is linked to one or more other buildings, the change will not propagate to any of the other related buildings. Building details, reports, budgets etc will all still need to be managed separately on each building card as is currently the case for separate buildings in PIQ.

### You can refer to the below instructions for more detail.

1. [View related buildings accordion](#)
2. [Link a related building](#) (for buildings that are in PIQ)
3. [Add other related building](#) (for buildings that are not in PIQ)
4. [Unlink a related building](#)
5. [Generate related buildings report](#)

- ## W RELATED BUILDINGS ACCORDION
1. Go to the *Info* tab.
  2. Click here to open the *Related Buildings* accordion.
  3. The SP/CTS/OC number of the building will show here.
  4. The name of the building will show here.
  5. *VIC buildings* - The Tier of the building will show here.  
*All other states* - This column will not be shown.
  6. *VIC buildings* - Total Units of Liability (UOL) for the building will show here.  
*QLD buildings* - Total Interest Entitlements (Int) for the building will show here.  
*All other states* - This column will not be shown.
  7. Total Units of Entitlement (UOE) for the building will show here.
  8. Total lots of the building will show here.
  9. The main bank account balance of the building will show here.
  10. Click *Add* to link buildings that are in your PIQ (create a new group of related buildings or add the selected building to an existing group of related buildings). Refer instructions [Link a Related Building](#) for more detail.
  11. Click *Add Other* to manually add a building that's managed by another strata/OC management company (a building that is not in your PIQ). Refer instructions [Add Other Related Building](#) for more detail.
  12. Click *Remove* to unlink a building from a group of related buildings.  
Refer instructions [Unlink a Related Building](#) for more detail.
  13. Click *Print* to generate a related buildings report in a new browser tab.  
Refer instructions [Generate Related Buildings Report](#) for more detail.
  14. Click *View* to open the building card of the selected building in the grid.  
Alternatively, you can double click on a row in the grid to view the building.

*NOTE: Terminology and column types will change depending on the building's State.*

**Building**

O/Corp\* 10  
Manager\* AMS Mick  
Folio\*  
Building Type\* Neighbourhood  
Building Sub Type\* Residential  
Building Class  
Services Only Tier 4  
Total UOL\* 351  
Total UOE\*  
Active All Inclusive Fees  
Debt Collection Payment

Address  
Street No 13 Street Name\* Mitre Drive  
Address 2  
Suburb CROYDON State\* VIC  
Building Name Atrium P/Code 3072

Total Lots - 9 (Primary - 6, Secondary - 3)

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

- Committee
- Tradespeople
- Insurance
- Investment Accounts
- Community Association / Precinct Association / Building Management Committee
- Related Buildings

O/Corp	Name	Tier	Total UOL	Total UOE	Total Lots	Main Bank Account Balance
11	The Plaza	5	100	220	2	\$98,107.40
65345	Ormond Towers	4	120	120	4	\$43,343.00

+ Add Remove Print View

## LINK A RELATED BUILDING

1. On the building card, go to the *Info* tab.
2. Click here to open the *Related Buildings* accordion.
3. Click *Add* to open the building list.
4. Select one or more buildings from the list.
5. Click *Select* to add the selected building/s.
6. Click *Close* to exit to return to the prior screen.

The screenshot shows the 'Building' card on the left and the 'Buildings' list on the right. The 'Building' card has tabs for Settings, Dates, Charges, Info, Financials, Budget, Notes, Documents, Registers, Alerts, Work Orders, Insurance Claims, Emails, and Log of Changes. The 'Info' tab is selected, showing details for 'O/Corp' and 'Address'. The 'Related Buildings' accordion is expanded, showing a table with columns: O/Corp, Name, Tier, Total UOL, Total UOE, Total Lots, and Main Bank Account Balance. The 'Add' button is highlighted with a blue circle and the number 3. The 'Buildings' list on the right shows a table with columns: S/Plan, Building Name, Str., Street Name, Suburb, Stat., Pos., Manager, Lots, and Fol. The 'The Plaza' building is selected, highlighted with a blue circle and the number 4. The 'Select' button is highlighted with a blue circle and the number 5, and the 'Close' button is highlighted with a blue circle and the number 6.

Once successfully added, the building will be shown in the grid.

**NOTE:** When linking buildings, if you select a building that's part of a group of related buildings, all buildings in that group will be linked and shown in the *Related Buildings* accordion of the building you're currently viewing.

Related Buildings						
O/Corp	Name	Tier	Total UOL	Total UOE	Total Lots	Main Bank Account Balance
11	The Plaza	5	100	220	2	\$98,107.40

[+ Add](#)
[Remove](#)
[Print](#)
[View](#)

## ADD OTHER RELATED BUILDING

1. On the building card, go to the *Info* tab.
2. Click here to open the *Related Buildings* accordion.
3. Click *Add Other* to add a building managed by another strata/OC management company (a building that is not in your PIQ). If the building is in your PIQ, link the building using the *+Add* button – refer instructions [above](#).
4. Enter the details of the building and manager, and an optional internal description (the description won't be included in printed reports).
5. Click *Save* to add this building as a related building.

The screenshot shows the 'Building' form with the 'Info' tab selected. The 'Related Buildings' section is expanded, showing a table with one entry: 'The Lakes' (O/Corp 342). A blue box labeled '1' highlights the 'Info' tab. A blue box labeled '2' highlights the 'Related Buildings' section. A blue box labeled '3' highlights the '+ Add Other' button. A blue box labeled '4' highlights the 'Other Building' modal form, which contains fields for O/Corp Number, Building Name, Strata Manager Name, Strata Manager Address, and Description. A blue box labeled '5' highlights the 'Save' button in the modal.

Once successfully added, the building will be shown in the grid in the colour **blue** to indicate that it's a manually added 'other' building.

Related Buildings							
O/Corp	Name	Tier	Total UOL	Primary Lots	Secondary Lots	Total Lots	Main Bank Account Balance
342	The Lakes	4	25	5	0	5	\$0.00
OC4	Green Apartments						

Hide Legend  
 • This building has been manually added

+ Add Other

+ Add Remove Print View

## UNLINK A RELATED BUILDING

1. On the building card, go to the *Info* tab.
2. Click here to open the *Related Buildings* accordion.
3. Click on a building in the grid to select it.
4. Click *Remove* to unlink or remove the selected building.

**IMPORTANT NOTE:** The building will be removed/unlinked from the group of related buildings, not just from the building currently being viewed.

**Building**

**O/Corp\*** 10  
**Manager\*** AMS Mick  
**Folio\***  
**Building Type\*** Neighbourhood  
**Building Sub Type\*** Residential  
**Building Class**  
**Services Only** ☐ **Tier** 4  
**Total UOL\*** 351  
**Total UOE\***  
**Active** ☒ **All Inclusive Fees** ☐  
**Debt Collection** ☒ **Payment** ☐

**Address**  
**Street No** 13 **Street Name\*** Mitre Drive  
**Address 2**  
**Suburb** CROYDON **State\*** VIC  
**Building Name** Atrium **P/Code** 3072  
**Total Lots** - 9 (Primary - 6, Secondary - 3)

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

▶ Committee  
 ▶ Tradespeople  
 ▶ Insurance  
 ▶ Investment Accounts  
 ▶ Community Association / Precinct Association / Building Management Committee  
 ▼ **Related Buildings**

O/Corp	Name	Tier	Total UOL	Total UOE	Total Lots	Main Bank Account Balance
11	The Plaza	5	100	220	2	\$98,107.40

**Buttons:** + Add, Remove, Print, View

**Footer:** Opening Balances, Schedules, Financial Reports, Edit, Done

You'll see a popup that warns you that the building will be removed/unlinked from the group of related buildings. Press *OK* to proceed.

Removing this building will unlink it from the group of related buildings. Do you want to continue?

**Buttons:** Cancel, Ok

Once removed, the building will no longer show in the *Related Buildings* accordion for any building in the group.



GENERATE RELATED BUILDINGS REPORT

- 1. On the building card, go to the *Info* tab.
- 2. Click here to open the *Related Buildings* accordion.
- 3. Click *Print* to generate the report in a new browser tab.

O/Corp\*

10

Manager\*

AMS Mick

Folio\*

Building Type \*

Neighbourhood

Building Sub Type\*

Residential

Building Class

Services Only

Tier

4

Total UOL \*

351

Total UOE\*

Active

☒

Debt Collection

☒

All Inclusive Fees

☐

Payment

☐

Address

Street No

13

Street Name\*

Mitre Drive

Address 2

Suburb

CROYDON

State\*

VIC

Building Name

Atrium

P/Code

3072

Total Lots - 9 (Primary - 6, Secondary - 3)

Settings

Dates

Charges

Info

Financials

Budget

Notes

Documents

Registers

Alerts

Work Orders

Insurance Claims

Emails

Log of Changes

Committee

Tradespeople

Insurance

Investment Accounts

Community Association / Precinct Association / Building Management Committee

Related Buildings

O/Corp	Name	Tier	Total UOL	Total UOE	Total Lots	Main Bank Account Balance
11	The Plaza	5	100	220	2	\$98,107.40

+ Add

Remove

Print

View

Opening Balances

Schedules

Financial Reports

Edit

Done

Example report:

(Note that terminology and column types will change depending on the building’s State)

Printed: 10/05/2024 02:43 pm    User: Nicki Scrivener

Page 1

Related Buildings Report

O/Corp 45654 Jade Apartments

O/Corp	Name	Strata Manager Name	Tier	Total UOL	Primary Lots	Secondary Lots	Total Lots	Balance
342	The Lakes	Brendan Comiskey	4	25	5	0	5	\$20,936.09

Other Related Buildings

O/Corp	Name	Strata Manager Name	Strata Manager Address
OC4	Green Apartments	ABC Strata Management	1 Green Avenue, Melbourne VIC 3000

## INFO CERTIFICATES

To improve efficiency and assist you in complying with your disclosure requirements, you can **record important information** on the building card and **set default attachments** for generated information certificates.

### DETAILS TAB

Under *Building card > Info tab > Info Certificate accordion > Details tab* you can record information that needs to be disclosed in information certificates. The data fields available on this screen will change depending on the building's State, as disclosure requirements vary State to State.

Each data field has a corresponding merge field that can be inserted into your certificate template/s and will allow this information to be pre-populated in each certificate generated.

#### Corresponding merge fields available in certificate templates

- General text fields: {{&Building\_Repairs}}, {{&Building\_Liabilities}}, {{&Building\_Leases\_Licenses}}, {{&Building\_Orders}}, {{&Building\_Proceedings}} and {{&Building\_Other\_Info}}
- Swimming pool: {{Swimming\_Pool}}
- Embedded network utilities: {{Embedded\_Electricity}}, {{Embedded\_Water}}, {{Embedded\_Internet}}
- (QLD) Is the scheme part of a layered arrangement?: {{Layered\_Arrangement}}
- (QLD) Is there a current sinking fund forecast?: {{Building\_Management\_Statement}}
- (QLD) Does a Building Management Statement (BMS) apply?: {{Sinking\_Fund\_Forecast}}
- (QLD) Is there alternative insurance approved under an alternative insurance order?: {{Insurance\_Alternative}}
- (ACT) Ceiling insulation – Are all lots exempt from complying with minimum insulation standards?: {{Insulation\_Exempt}}
- (ACT) Ceiling insulation – Lots that must comply (table of lots, whether lot has insulation and R-value): {{Insulation\_Min\_Standards}}
- (ACT) Ceiling insulation statement: {{&Ceiling\_Insulation\_Statement}}

#### Data fields (All States)

▼ Info Certificates

Details Attachments

Repairs & Maintenance:

Liabilities:

Leases & Licenses: ☐ Include leases and licenses register report in certificates

Notices & Orders:

Legal Proceedings:

Other Information:

Swimming Pool: Is there a regulated swimming pool?

Embedded Network Utilities: Electricity  Hot Water / Gas  Internet / Data

## QLD additional fields

Is the scheme part of a layered arrangement?	<input type="text"/>	Does a Building Management Statement (BMS) apply?	<input type="text"/>
Is there a current sinking fund forecast?	<input type="text"/>	Is there alternative insurance approved under an alternative insurance order?	<input type="text"/>

## ACT additional fields

Ceiling Insulation: Are all lots exempt from complying with minimum insulation standards?

Lots that must comply

Lot: 1	Unit: 1	<input checked="" type="checkbox"/> Has Insulation?	R-value	<input type="text"/>	<input type="button" value="View"/>	<input type="button" value="Remove"/>
Owner: Owner 1						
<input type="button" value="+ Add Lot(s)"/>						

Ceiling Insulation Statement:

## ADD DETAIL TO CERTIFICATE DATA FIELDS

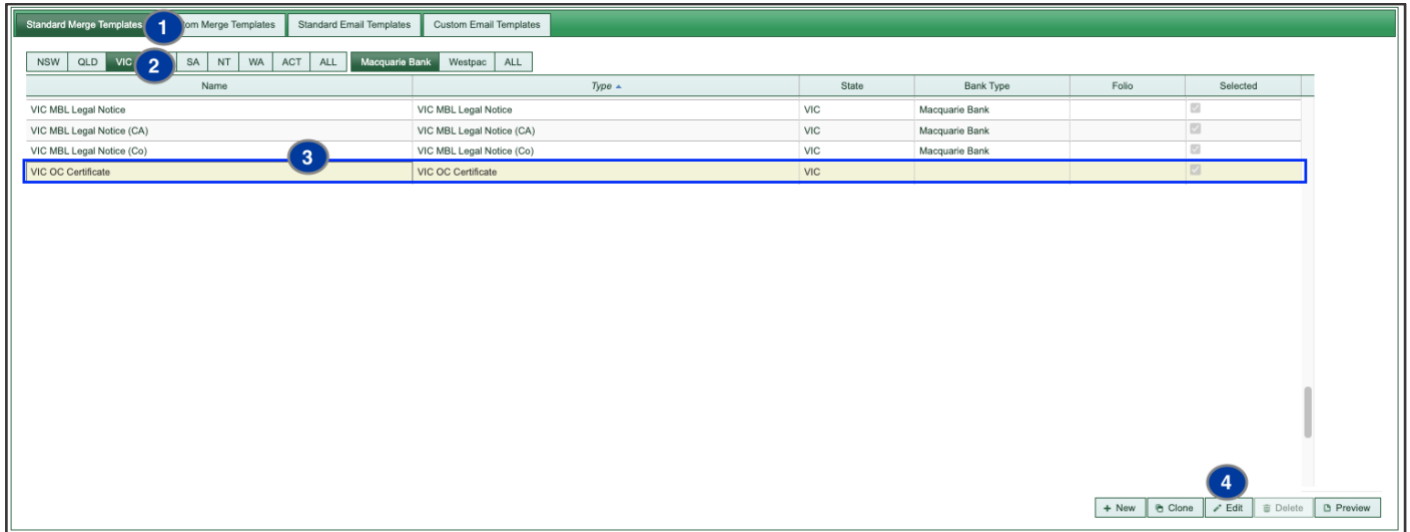
1. On the building card, go to the *Info* tab
2. Click on the *Info Certificates* accordion
3. Click on the *Details* tab
4. **Repairs and Maintenance** - Here you can record details of any repairs, maintenance or other work that has been or is about to be performed that may incur additional charges. Any information entered here will be shown in the merge field `{{&Building_Repairs}}` in the certificate template.
5. **Liabilities** - Here you can record details of any liabilities and contingent liabilities of the building. Any information entered here will be shown in the merge field `{{&Building_Liabilities}}` in the certificate template.
6. **Leases & Licenses** - Here you can record details of any leases and licenses over common property or a lot. Any information entered here will be shown in the merge field `{{&Building_Leases_Licenses}}` available in the certificate template.
7. **Leases & Licenses report when generating Certificate** – Here you can decide to include the leases and licenses register report by default when generating certificates. If you tick the checkbox, it'll be included when generating a certificate.
8. **Notices & Orders** - Here you can record details of any notices or orders served on the building in the last 12 months that haven't been satisfied. Any information entered here will be shown in the merge field `{{&Building_Orders}}` in the certificate template.
9. **Legal Proceedings** - Here you can record details of any legal proceedings to which the building is a party and any circumstances that are likely to give rise to proceedings. Any information entered here will be shown in the merge field `{{&Building_Proceedings}}` in the certificate template.
10. **Other Information** - Here you can record any other details or general information that may need to be disclosed by the building. Any information entered here will be shown in the merge field `{{&Building_Other_Info}}` in the certificate template.
11. **Swimming Pool** – Here you can record if the building has a regulated swimming pool. The dropdown options are blank, Yes or No. It is blank by default. The response will be shown in the merge field `{{Swimming_Pool}}` in the certificate template.
12. **Embedded Network Utilities - Electricity** – Here you can record if the building has an embedded electricity network. The dropdown options are blank, Yes or No. It is blank by default. The response will be shown in the merge field `{{Embedded_Electricity}}` in the certificate template.
13. **Embedded Network Utilities – Hot Water / Gas** – Here you can record if the building has an embedded hot water and/or gas network. The dropdown options are blank, Yes or No. It is blank by default. The response will be shown in the merge field `{{Embedded_Water}}` in the certificate template.

- 14. Embedded Network Utilities – Internet / Data** – Here you can record if the building has an embedded internet or data network. The dropdown options are blank, Yes or No. It is blank by default. The response will be shown in the merge field {{Embedded\_Internet}} in the certificate template.
- 15.** Click **Save** to save your changes.

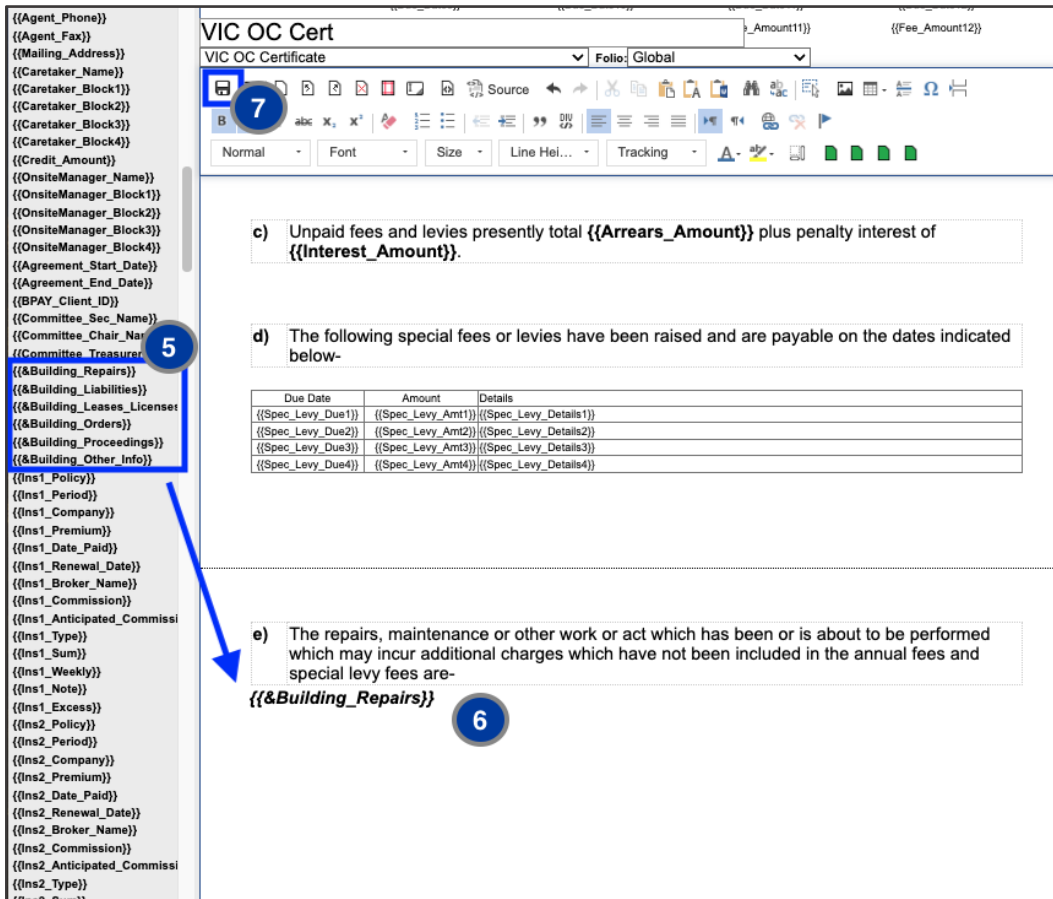
The screenshot displays the 'Buildings - Info Tab' in the PropertyIQ software. The interface includes a top navigation bar with tabs: Settings, Dates, Charges, Info (1), Financials, Budget, Notes, Documents, Registers, Alerts, Work Orders, Insurance Claims, Emails, and Log of Changes. Below this is a sidebar menu with expandable sections: Committee, Building Information, Tradespeople, Insurance, Investment Accounts, Community Association / Precinct Association / Building Management Committee, Related Buildings (2), and Info Certificates (3). The 'Info Certificates' section is active, showing a 'Details' tab. The main content area contains several text input fields for 'Repairs & Maintenance:' (4), 'Liabilities:' (5), 'Leases & Licenses:' (6) which includes a checkbox 'Include leases and licenses register report in certificates', 'Notices & Orders:' (8), 'Legal Proceedings:' (9), and 'Other Information:' (10). Below these is a 'Swimming Pool:' section with a dropdown 'Is there a regulated swimming pool?' (11). At the bottom, the 'Embedded Network Utilities:' section contains three dropdown menus: 'Electricity' (12), 'Hot Water / Gas' (13), and 'Internet / Data' (14). A 'Save' button (15) and a 'Cancel' button are located at the bottom right of the form.

## ADD MERGE FIELDS TO CERTIFICATE TEMPLATE

1. To update your certificate template, go to *File>Templates>Standard Merge Templates* screen
2. Select the State filter to view templates specific to your State (if not already selected)
3. Find and click on the relevant certificate template in the list
4. Click on *Edit* button to open and edit the template. Alternatively, you can double click on the template in the list to open and edit.



5. Find and locate the new merge fields in the merge field list. You can click 'Ctrl' + 'F' on your keyboard to search content on the screen.
6. Insert them into your template where applicable
7. Click the Save button to save your changes



## ATTACHMENTS TAB

To make it easier for you to manage certificate attachments, you can now set documents as default attachments for certificates from the building card.

From the attachments tab, you can:

- add, view, remove and re-order documents you want included as default attachments to certificates.
- for buildings with more than one certificate type (QLD, ACT), you can also select whether a document is attached to all certificates, or only one certificate type.
- for buildings where only one certificate type is applicable, you'll see 'All' as the type by default.

Any default attachments relevant to the certificate type being generated, will be automatically included within the *Attachments* accordion on the certificate generation screen, where you can then do a final review, reorder, remove and add custom attachments as required before generating a new certificate.

**IMPORTANT NOTE:** Any changes made to default attachments will only apply to newly generated certificates and will not affect any certificates in a draft or published state.

The screenshot shows the 'Attachments' tab within the 'Info Certificates' section. A message states: 'Any changes made to attachments will only apply to new certificates.' Below this is a table with columns: Name, Date, Size, and Certificate Type. The table contains two entries: 'Notice 234323 - AGM 05/03/2218.pdf' (5/3/2218, 479.06 kB, All) and 'Financial Report Final 01-07-2015 to 30-06-2016.pdf' (19/12/2024, 13.90 kB, Section 205). At the bottom are buttons for '+ Add Document' and '- Remove Document'.

Name	Date	Size	Certificate Type
Notice 234323 - AGM 05/03/2218.pdf	5/3/2218	479.06 kB	All
Financial Report Final 01-07-2015 to 30-06-2016.pdf	19/12/2024	13.90 kB	Section 205

The screenshot shows the 'Information Certificate Generation' screen. Under 'Selected Lot Info', it shows 'Lot: 1', 'Building: The Lake', and 'State: QLD'. The 'Certificate Date' is set to '10/01/2025'. The 'Type' is set to 'Section 205'. There are input fields for 'Invoice Receiver Name', 'Invoice Receiver Address Line 1', 'Invoice Receiver Address Line 2', 'Invoice Receiver Address Line 3', 'Invoice Amount' (\$0.00), 'Invoice Included GST' (\$0.00), 'Invoice Reference', and 'Invoice Paid Label'. There are two sections of checkboxes: 'Include Register Reports' (Assets Register, Authorisations Affecting Lots, Common Authorisations, Compliance Register, Contracts Register, Exclusive Use Allocations, Funding Proposals, Leases and Licenses, Lot Authorisations, Unregistered By-Laws) and 'Include Other Reports' (Insurance Claim Register). At the bottom, there is an 'Attachments' section with a table showing the same two documents as the previous screenshot. At the very bottom are buttons for '+ Add Document' and '- Remove Document'.

Name	Date	Size
Notice 234323 - AGM 05/03/2218.pdf	5/3/2218	479.06 kB
Financial Report Final 01-07-2015 to 30-06-2016.pdf	19/12/2024	13.90 kB