



Buildings – Documents tab

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DOCUMENTS TAB

All the documents that have been uploaded or internally generated for a building are available in this area. Documents can be in the format of PDF, JPEG (JPG) PNG, word document or excel. Note: only PDF documents can be previewed from the documents tab using the *View Doc* button

1. Select a date range to refine your search
2. To filter your view by document type, click on the dropdown list
3. Click to highlight document(s) on the screen.
4. The time and date of creation shows in this column
5. The date the document was uploaded shows here
6. The user that uploaded the document shows here
7. The name of the document shows here
8. The document type shows here
9. The details of the document show here
10. Click on *Due Notice Attachments/Cover Pages* to add documents that will be automatically attached whenever you send out due notices. (see details below)
11. Click *+Document Entry* to add a document (see details below)
12. Click *View Doc* to view the document – this option is only available for documents in PDF format
13. Click *Email* to email the document (see details below)
14. Click *Print* to create a printable copy of the document
15. Click *Download* to download the document for viewing or saving elsewhere
16. Click *Delete* to delete the document
17. Click *Upload Document* to upload a strata plan document that isn't already saved in the building's documents
18. Click *Choose Plans Document* to select a plan document that is already saved in the building's documents
19. Click *Upload Document* to upload a by-Laws document that isn't already saved in the building's documents
20. Click *Choose By-Laws Document* to select a by-laws document that is already saved in the building's documents

Because Plans and By-Laws are viewed frequently, you can create short cuts to view them

C.T.S.* 4356

Manager* Anne Fluva

Folio*

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

Plan 234

Parish Magnetic

County Strathvern

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

From 01/07/2017 To 08/10/2018

Filter: All

	Created Time	Date	User	Name	Type	Details
<input type="checkbox"/>	24/09/2018 - 11:45 am	24/9/2018	ams	Debtor Invoice 2018-09-01.pdf	Debtor Invoice	
<input checked="" type="checkbox"/>	03/07/2018 - 7:51 pm	3/7/2018	ams	Management of Funds Report - 04/08/2017 to 08/0...	Financial	Generated by Building Financial Reports
<input type="checkbox"/>	24/05/2018 - 3:08 pm	24/5/2018	ams	Financial Report 09-02-2018 to 08-05-2018.pdf	Financial	Generated by Bulk Building Financial Reports
<input type="checkbox"/>	14/11/2017 - 12:32 pm	14/11/2017	ams	The Mariner 2017 Proposed Budget Report.pdf	Budget Report	Generated by Print Budget
<input type="checkbox"/>	14/11/2017 - 9:54 am		ams	433 Revu Account 500 00 pdf	Si	al Am

1 document selected

Due Notice Attachments/Cover Pages

+ Document Entry

View Doc

Email

Print

Download

Delete

Custom Documents

Plans: No file chosen

Upload Document

Choose Plans Document

By Laws: No file chosen

Upload Document

Choose By Laws Document

Opening Balances

Schedules

Financial Reports

Edit

Done

DUE NOTICE ATTACHMENTS

You can attach a document to be sent as an attachment to Due Notices

1. Select *Due Notice Attachments/Cover Pages*
2. Select *Due Notice Attachments*
3. Click *Edit*

The screenshot shows the 'Building' form in the PropertyIQ system. The 'Due Notice Attachments/Cover Pages' dialog box is open, with the 'Due Notice Attachments' tab selected. The dialog box has a table with columns: Notice Type, Attached Document, Continuous, and Expiry Date. Below the table is a '+ Add New Attachment' button. The main form in the background shows the 'Documents' tab selected, with a table of documents. The first document is highlighted, and the '+ Add New Attachment' button is circled in red.

Created Time	Date	User	Name	Type	Details
08/10/2018 - 8:45 am	8/10/2018	ams	PIQ client billing audit.xlsx	Asbestos Report	
08/10/2018 - 8:45 am	8/10/2018	ams	A quick guide to adding a building - Victoria.docx	Meeting	
24/09/2018 - 11:45 am	24/9/2018	ams	Debtor Invoice 2018-09-01.pdf	Debtor Invoice	
03/07/2018 - 7:51 pm	3/7/2018	ams	Management of Funds Report - 04/08/2017 to 08/0...	Financial	Generated by Building Financial Reports
24/05/2018 - 3:08 pm	24/5/2018	ams	Financial Report 08/07/2017 to 25/07/2018.pdf	Financial	Generated by Building Financial Reports

Click *+Add New Attachment*

This is a close-up of the '+ Add New Attachment' button in the 'Due Notice Attachments/Cover Pages' dialog box. The button is highlighted with a red rectangle. Below the button are 'Save' and 'Cancel' buttons.

1. Select the notice type you want to attach this document to. The choices are: reminder, arrears, legal and final
2. Select document to search for the document you want to attach
3. By default, the document will be attached continuously, but you can untick to select an expiry date
4. You can delete the attachment here

1. Select Document opens the building's document tab
2. Select the document you want to view
3. Click *Select*

Date	Name	S/Plan	Building Name	Street Name	Lot	U	Manager	Supplier	Document
8/10/...	A quick guide to adding a building - Victo...	4356	The Mariner	Mariners Drive			Anne Flava		Meeting
8/10/...	PIQ client billing audit.xlsx	4356	The Mariner	Mariners Drive			Anne Flava		Asbestos ...
8/10/...	Legal Notice Attachment.pdf	4356	The Mariner	Mariners Drive			Anne Flava		Other
24/09/...	Debtor Invoice 2018-09-01.pdf	4356	The Mariner	Mariners Drive			Anne Flava		Debtor Inv...

COVER PAGE ATTACHMENTS

You can attach a custom merge template as a cover page for due notices.

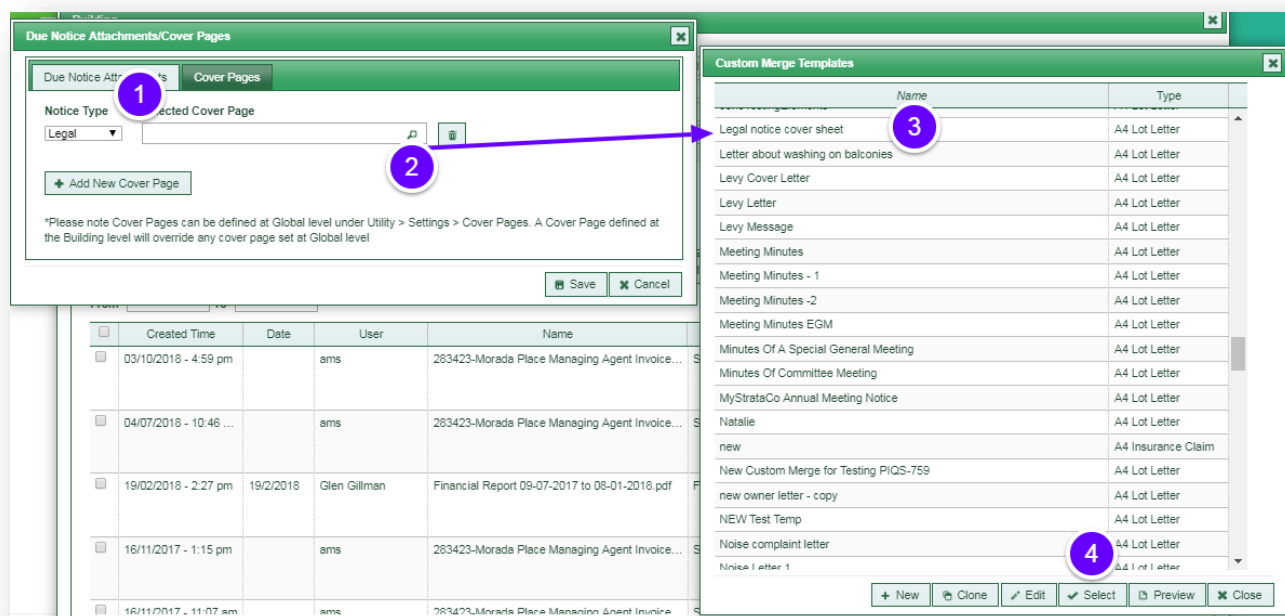
1. From the building card select the documents tab,
2. Select *Due Notice attachments/cover pages*
3. Click *Edit*
4. Select *Cover Pages*

The screenshot shows the 'Due Notice Attachments/Cover Pages' window. The 'Cover Pages' tab is selected, and the 'Add New Cover Page' button is highlighted with a red circle. The 'Documents' tab is also visible in the background, showing a table of documents. The table has columns: Created Time, Date, User, Name, Type, Details, and On Portal. The table contains five rows of data. Below the table, there are buttons for 'Add New Cover Page', 'Edit', and 'Done'. A note states: 'Please note Cover Pages can be defined at Global level under Utility > Settings > Cover Pages. A Cover Page defined at the Building level will override any cover page set at Global level.'

1. Click *+Add New Cover Page*

The screenshot shows the 'Due Notice Attachments/Cover Pages' window. The 'Cover Pages' tab is selected, and the 'Add New Cover Page' button is highlighted with a red circle. The 'Add New Cover Page' button is located below the 'Notice Type' and 'Selected Cover Page' labels. A note states: 'Please note Cover Pages can be defined at Global level under Utility > Settings > Cover Pages. A Cover Page defined at the Building level will override any cover page set at Global level.'

1. Choose the type of due notice you want to attach the cover sheet to. The choices are: reminder, arrears, final or legal
2. Click on the search icon to search for the custom merge template you want to attach
3. Select the custom merge document
4. Click *Select*



Note: You will need to create the custom merge documents you want to attach.

DOCUMENT ENTRY

Click on **+Document Entry** to get started

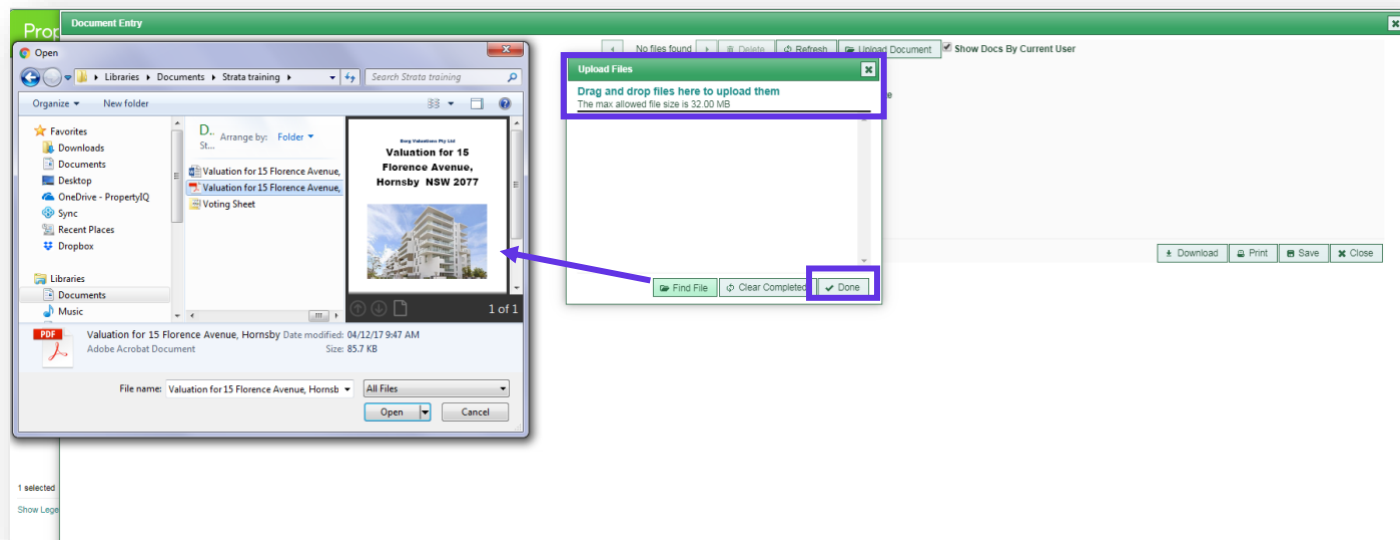
The screenshot shows the 'Building' management interface. The top section contains form fields for building details: S/Plan (888777), Manager (Training Manager), Folio (Group B Folio), Building Type (Strata), Building Sub Type (Residential), Building Class, Total UOE (220), Active status, Debt Collection, All Inclusive Fees, and Payment Plan. The Address section includes Street No (15), Street Name (Florence), Address 2, Suburb (HORNSBY), State (NSW), and P/Code (2077). The bottom section features a tabbed interface with 'Documents' selected. A table lists documents with columns: Created Time, Date, User, Name, Type, Details, and On Portal. The table shows five entries for 'Insurance Claim' documents. Below the table, there are buttons for 'Due Notice Attachments', '+ Document Entry' (highlighted with a red box), 'View Doc', 'Email', 'Print', 'Download', and 'Delete'. At the bottom, there are buttons for 'Opening Balances', 'Info Certificates', 'Schedules', 'Financial Reports', 'Edit', and 'Done'.

Click **Upload Document**

The screenshot shows the 'Document Entry' dialog box. It has a title bar 'Document Entry' and a close button. The main area contains a list of fields for document entry: Date, Name, C.T.S. (888777 Hornsby Towers), Schedule, Lot, Supplier, Document Type, and Comments. There are buttons for 'No files found', 'Delete', 'Refresh', 'Upload Document' (highlighted with a red box), and 'Show Docs By Current User'. At the bottom right, there are buttons for 'Download', 'Print', 'Save', and 'Close'.

You can either drag and drop files or choose **Find File** to select them from your computer

Click **Done** when you have added all the files you want.



1. If you are uploading PDF documents you will see preview of each document. These documents are pending full upload. You can have more than one document pending full upload by using the arrows to move between documents
2. Click *Delete* to remove a pending document
3. Click *Refresh* to refresh the screen
4. "Show docs by current user" will be ticked by default, but you can untick this if you want to view documents that were selected by another user.
5. The date defaults to today's date, but you can alter if you want to.
6. The name of the document that is being previewed and its size show here
7. As you are entering from the building card, the building will already be selected
8. If the building has more than one contribution schedule, select the schedule from the dropdown list
9. If this document relates to a lot, click on the search icon to search for the lot this document relates to.
10. If this document relates to a supplier, click on the search icon to look for the supplier this document relates to
11. Choose the document type from the dropdown list
12. Click *Download* to download the document to your computer
13. Click on *Print* to open a PDF copy of the document in a new tab that you can print
14. Click *Save*

EMAILING THE DOCUMENT

1. The documents that are being emailed show here. Check that you have the correct document here
2. Click to select the building delivery options
3. Click to select the lot delivery options
4. If this is a general correspondence email you have the choice to email to all recipients *or* only email to those recipients whose general correspondence delivery method is set to email
5. You can type email addresses here to email individuals
6. You can type email addresses here to BCC individuals
7. Enter an email subject here
8. Enter the body of your email here
9. Click here to email the document(s) when you are ready

The screenshot shows a software window titled "Emailing Documents" with a close button (X) in the top right corner. The window is divided into several sections:

- Documents To Be Emailed:** This section lists three PDF files: "123456789_Jack of All Trades_200.00.pdf (35.81 KB)", "The Bachelor Pad 2016 Amended Budget Report.pdf (49.06 KB)", and "The Bachelor Pad 2016 Proposed Budget Report.pdf (36.42 KB)". A blue circle with the number 1 is next to the second file.
- Total Attachments Size:** Displays "121.30 KB".
- Delivery Options:** This section contains three sub-sections:
 - Building Delivery Options:** Includes a tab and two checkboxes: "Committee Members Email" (checked) and "Original Proprietor Email" (checked). A blue circle with the number 2 is next to the "Committee Members Email" checkbox.
 - All Lot Delivery Options:** Includes a tab and six checkboxes: "Owner Email" (checked), "Tenant Email" (checked), "Levy Recipient Email" (checked), "Mortgagees Email" (unchecked), "Nominees Email" (checked), and "Managing Agent Email" (checked). A blue circle with the number 3 is next to the "Owner Email" checkbox.
 - General Correspondence email:** Includes a tab and two radio buttons: "Send to all" (selected) and "Only send if Deliver Correspondence by email is set". A blue circle with the number 4 is next to the "Send to all" radio button.
- Manual Delivery:** Includes a tab and two checkboxes: "Manual Email" (checked) and "Manual Bcc Email" (checked). Below each checkbox is a text input field. The "Manual Email" field contains "jessiemelven@gmail.com" and the "Manual Bcc Email" field contains "reginabrown@mystrataco". A blue circle with the number 5 is next to the "Manual Email" checkbox, and a blue circle with the number 6 is next to the "Manual Bcc Email" checkbox.
- Email Settings:** Includes a tab and two text input fields: "Email Subject:" and "Email Body:". The "Email Subject:" field contains "Here's your Documents" and the "Email Body:" field contains "Hello all," and "here are your documents". A blue circle with the number 7 is next to the "Email Subject:" field, a blue circle with the number 8 is next to the "Email Body:" field, and a blue circle with the number 9 is next to the "Email Body:" field.

At the bottom right of the window are two buttons: "Email Document(s)" and "Cancel".

PLANS AND BY LAWS DOCUMENTS

Because these two types of documents need to be referenced frequently, they can be accessed and viewed using shortcut buttons.

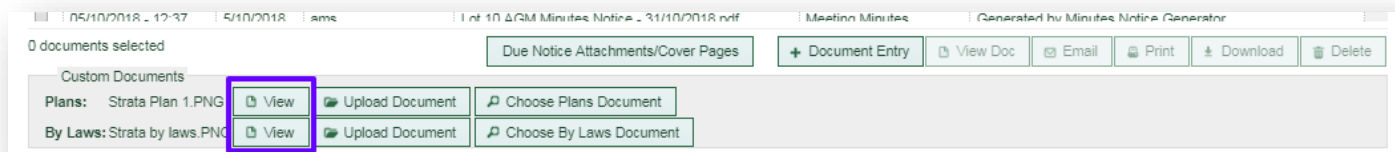
Click *Upload* to upload a document from your computer that isn't already saved in the building's documents

The screenshot shows the 'Documents' tab in the PropertyIQ interface. The left sidebar contains a list of documents with columns for 'Created Time', 'Date', 'User', 'Name', 'Type', and 'Details'. The main area displays a table of documents. A blue arrow points from the 'Choose Plans Document' button in the bottom left to the 'Documents library' sidebar on the right. The sidebar lists 'Strata by laws', 'Strata Plan 1', 'Strata Plan 3', and 'Strata Plan2'.

1. Click *Choose Plans Document* or *Choose By-Laws Document* to select a document that is already saved in PropertyIQ for that building
2. Type some key letters in any of the empty boxes on the top line to refine your search
3. Click on a document to highlight it, and then double click to select it
4. Click on *Select* to select a document that is already highlighted on the screen

The screenshot shows the 'Documents' tab in the PropertyIQ interface. The left sidebar contains a list of documents with columns for 'Created Time', 'Date', 'User', 'Name', 'Type', and 'Details'. The main area displays a table of documents. A blue arrow points from the 'Choose Plans Document' button in the bottom left to the 'Documents' table. The table has columns for 'Date', 'Name', 'SP Plan', 'Building Name', 'Street Name', 'Lot', 'U', 'Supplier', 'Document', and 'On P'. The first row is highlighted, and the 'Select' button is visible in the bottom right corner.

Once the documents are attached, you can view them by clicking *View*



This opens a PDF in a new Tab

