Buildings – Documents tab

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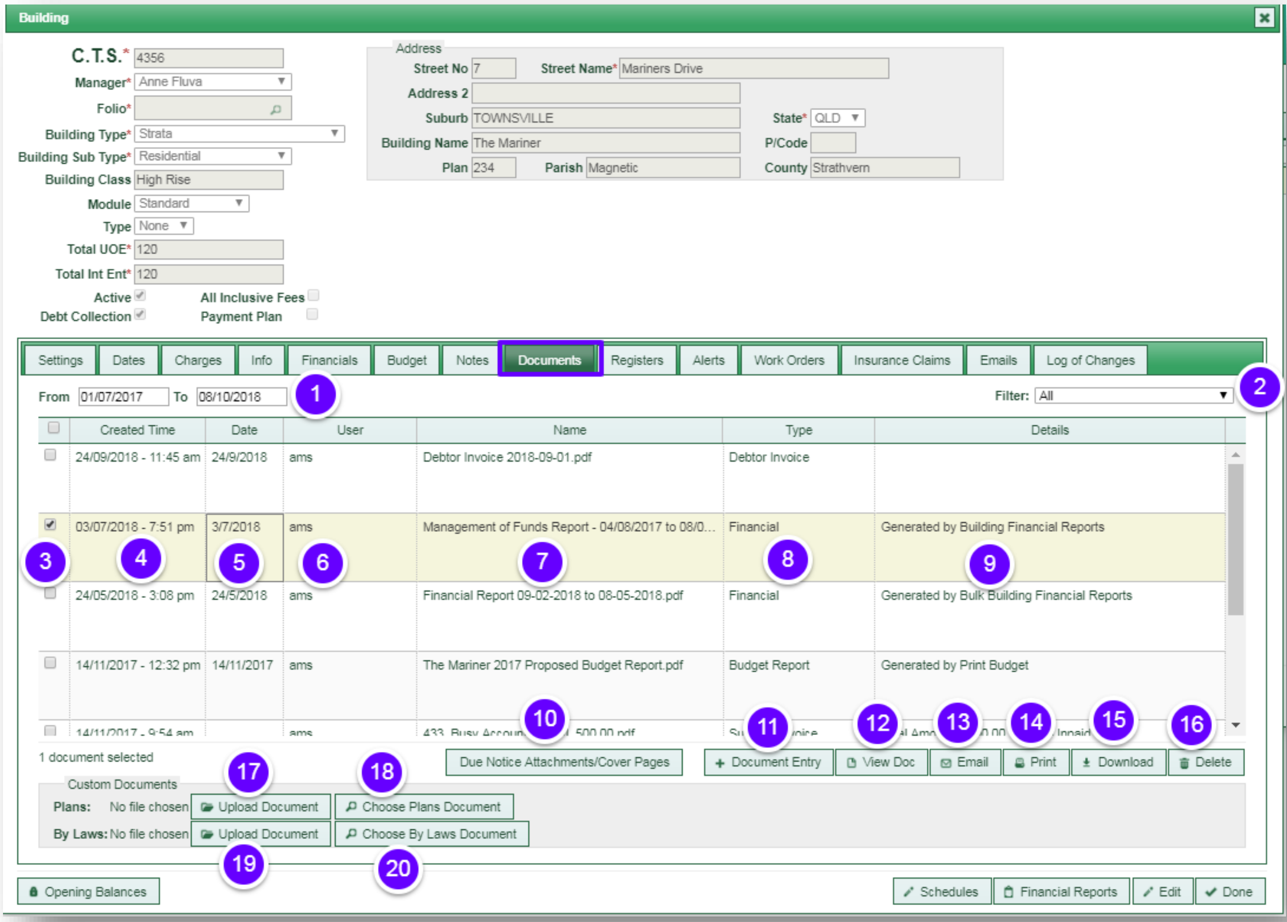
DOCUMENTS TAB

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


Building
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
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 09-02-2018 to 08-05-2018.pdf
Financial
Generated by Bulk Building Financial Reports
14/11/2017 - 12:32 pm
14/11/2017
ams
The Mariner 2017 Proposed Budget Report.pdf
Budget Report
Generated by Print Budget
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
1
2
3
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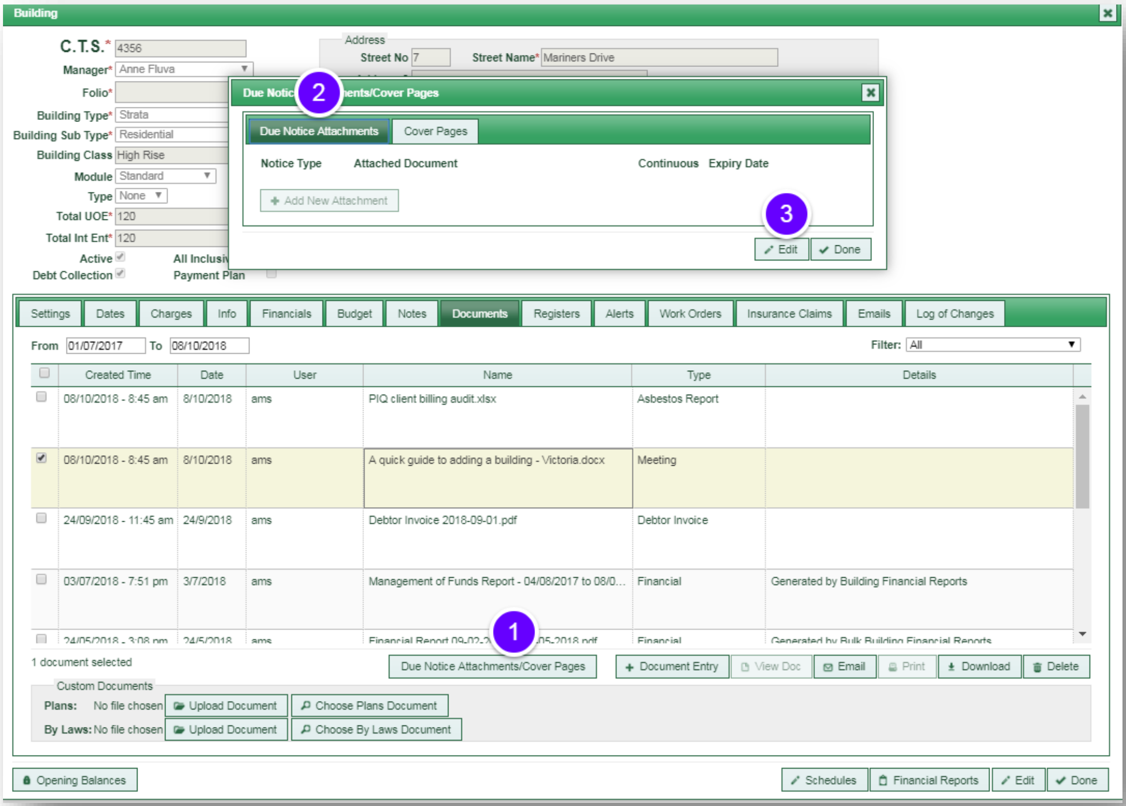
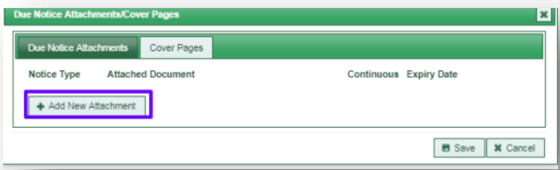
DUE NOTICE ATTACHMENTS

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

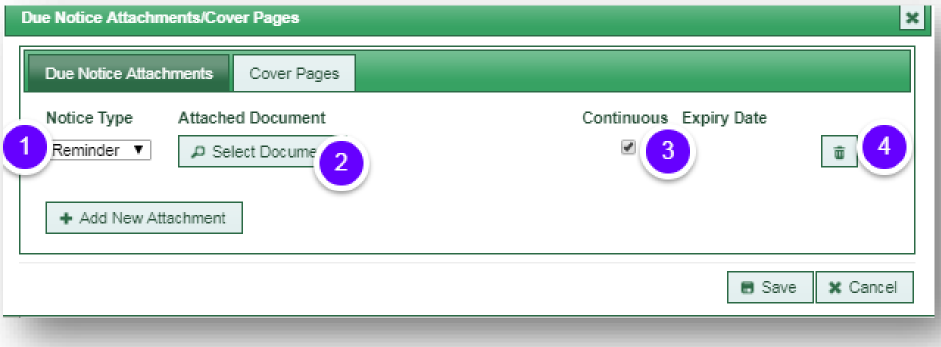
1. Select *Due Notice Attachments/Cover Pages*
2. Select *Due Notice Attachments*
3. Click *Edit*



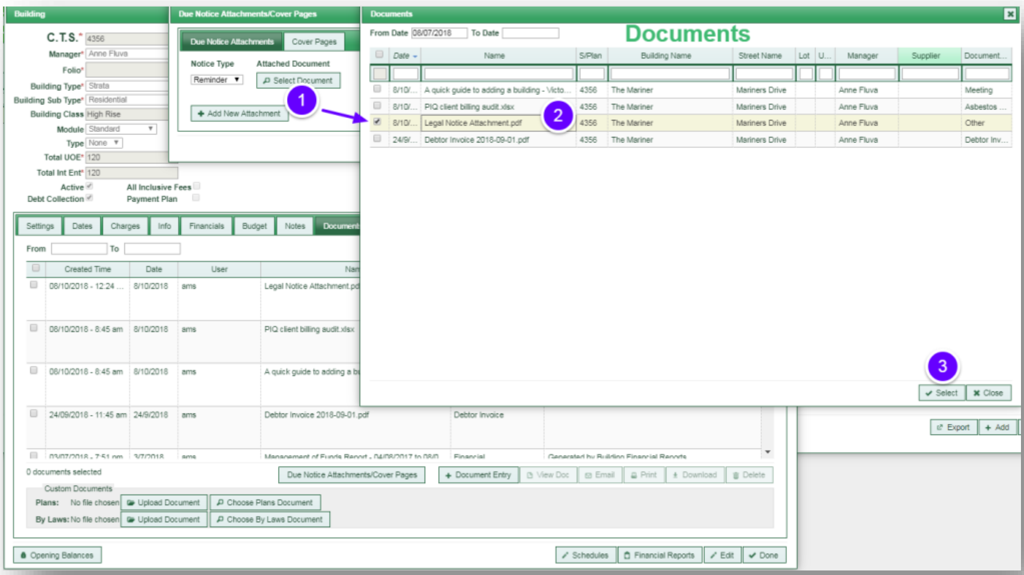
Click *+Add New Attachment*



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



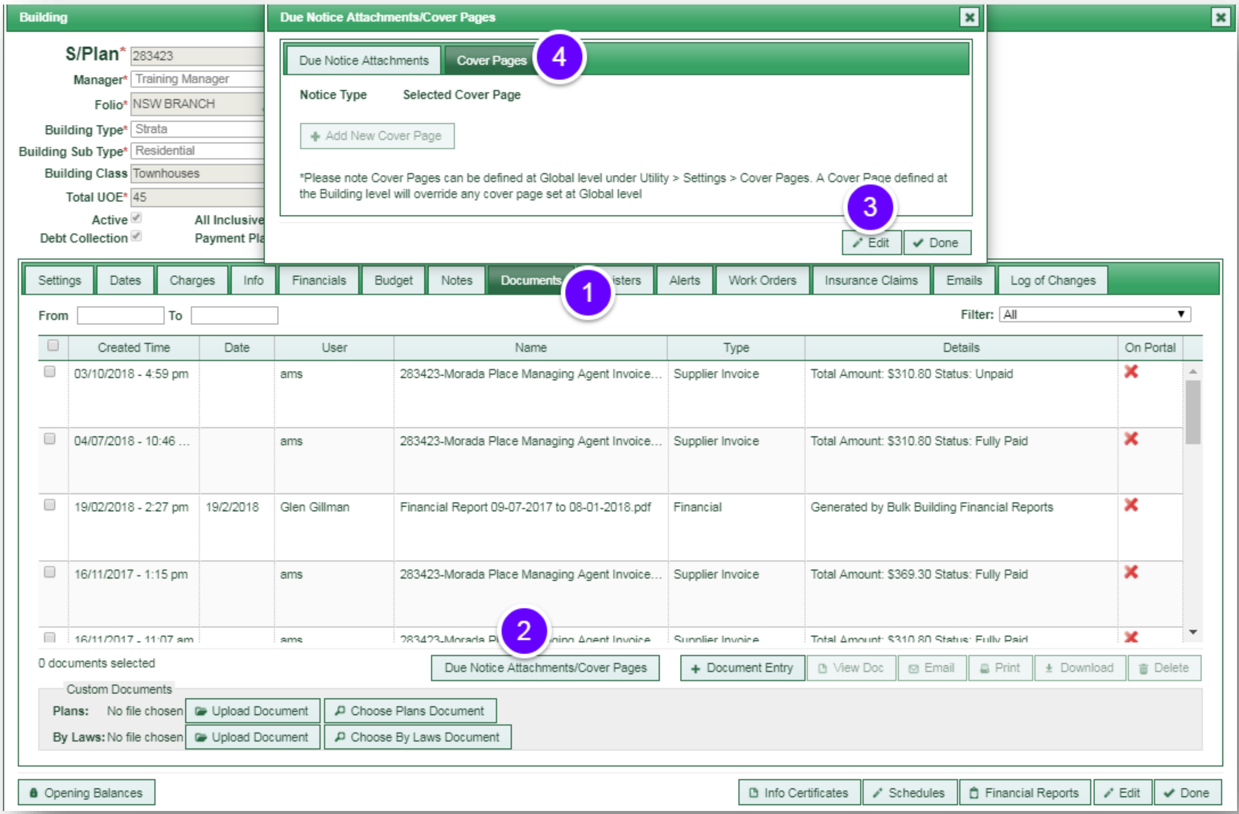
1. Select Document opens the building's document tab
2. Select the document you want to view
3. Click *Select*



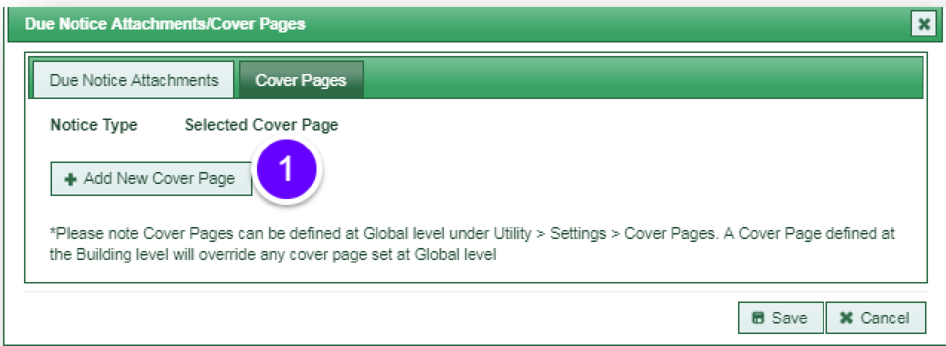
COVER PAGE ATTACHMENTS

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

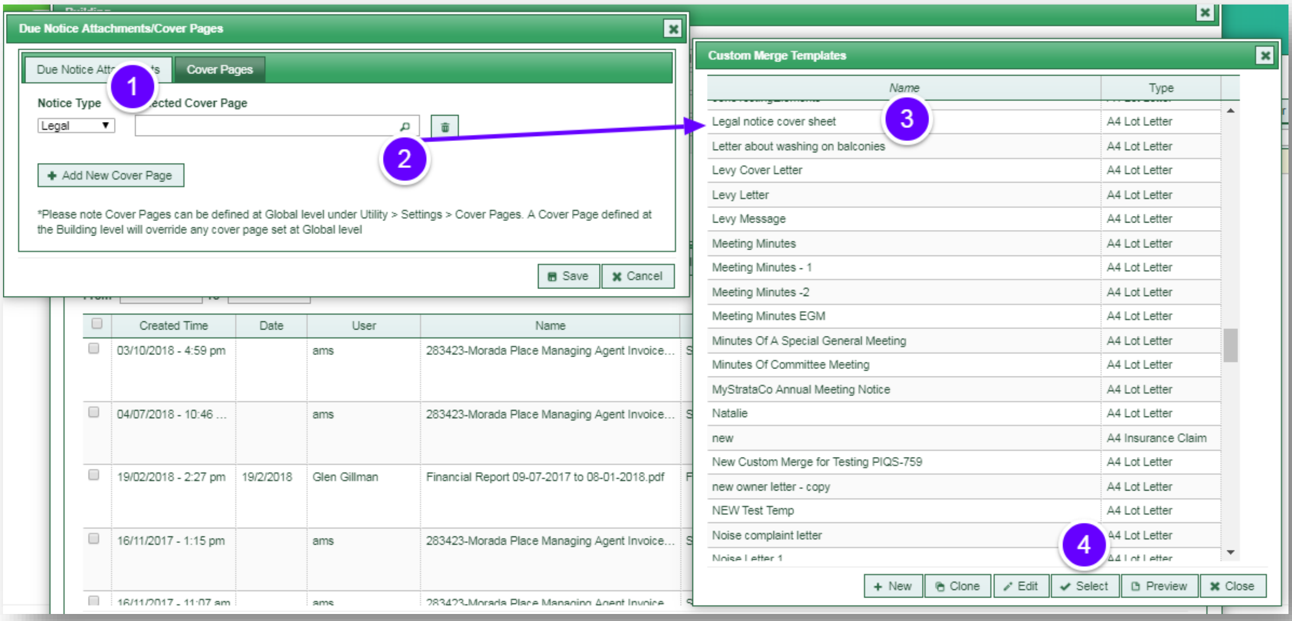
1. From the building card select the documents tab,
2. Select *Due Notice attachments/cover pages*
3. Click *Edit*
4. Select *Cover Pages*



1. Click *+Add New Cover Page*



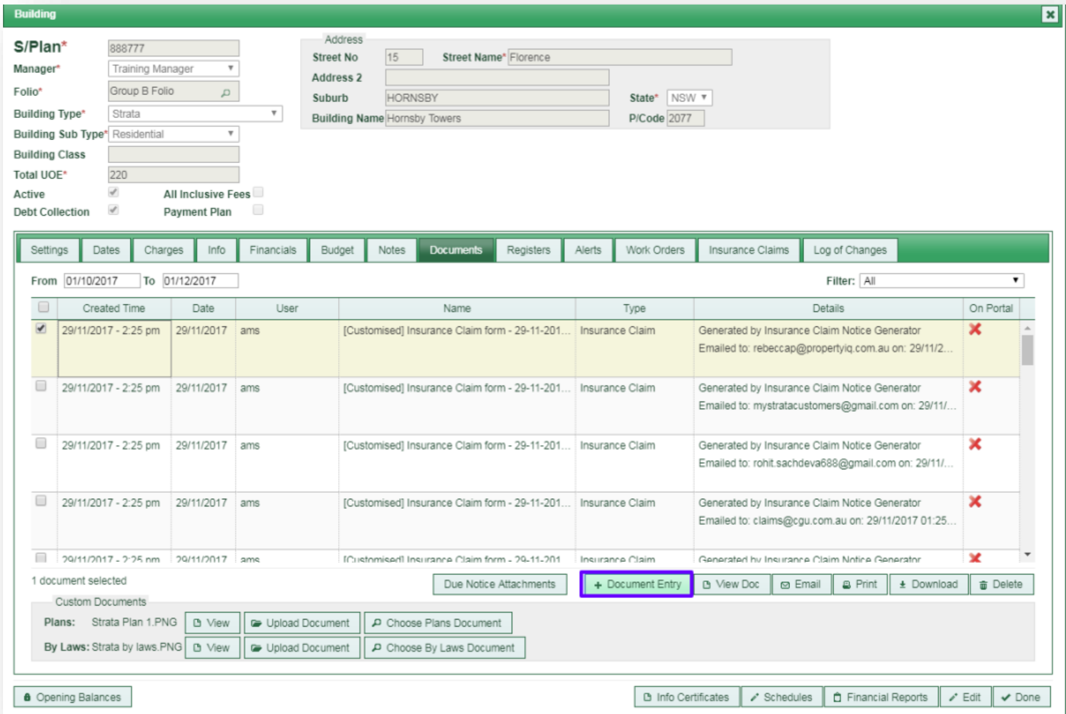
1. Choose the type of due notice you want to attach the cover sheet to. The choices are: reminder, arrears, final or legal
2. Click on the search icon to search for the custom merge template you want to attach
3. Select the custom merge document
4. Click *Select*



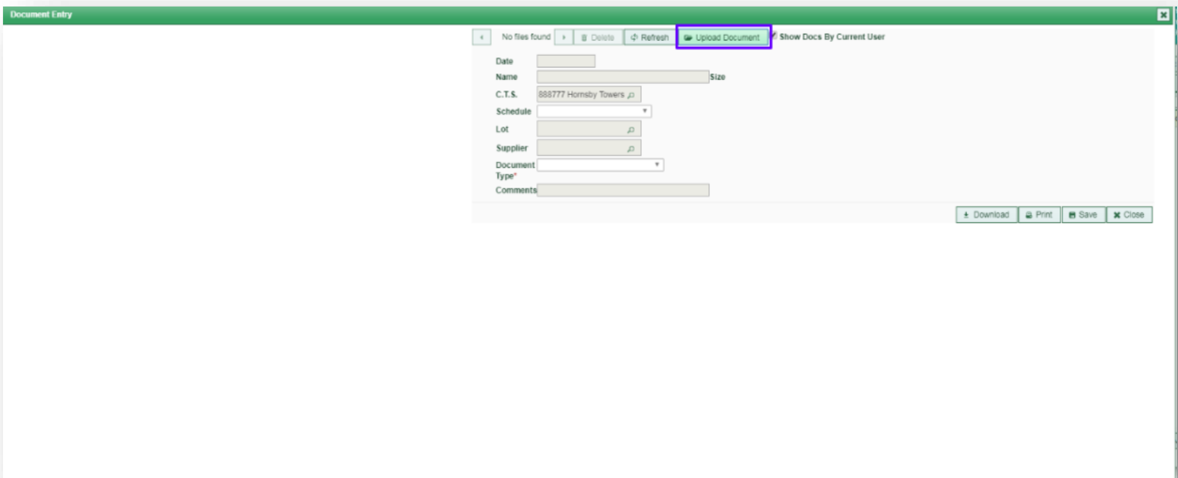
Note: You will need to create the custom merge documents you want to attach.

DOCUMENT ENTRY

Click on *+Document Entry* to get started

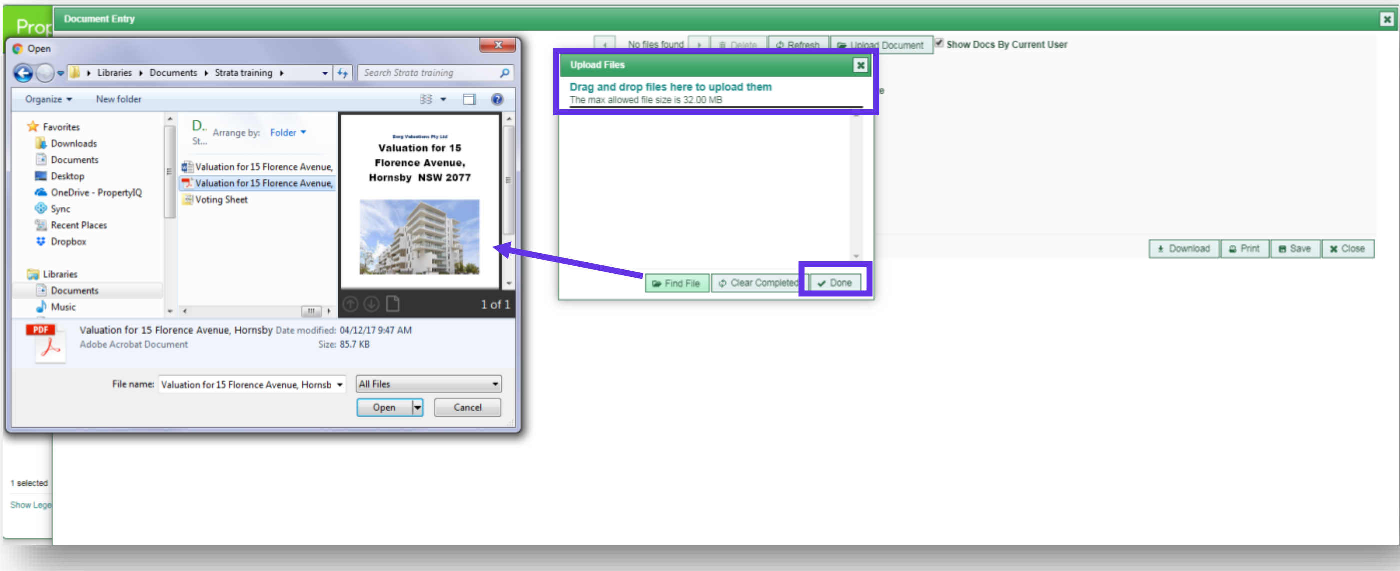


Click *Upload Document*

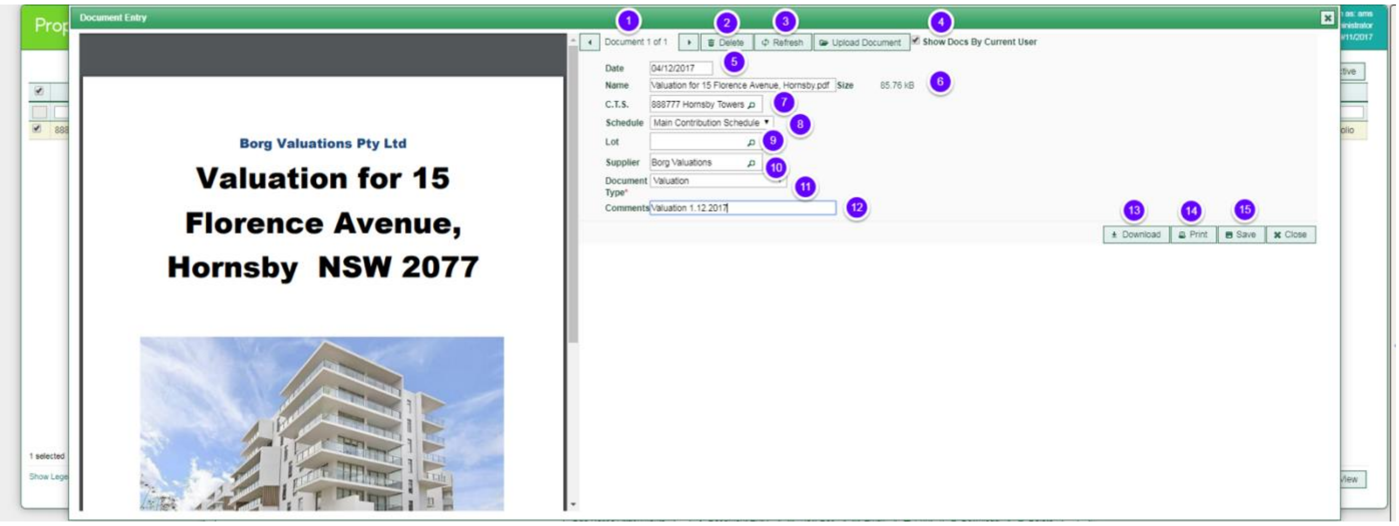


You can either drag and drop files or choose *Find File* to select them from your computer

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

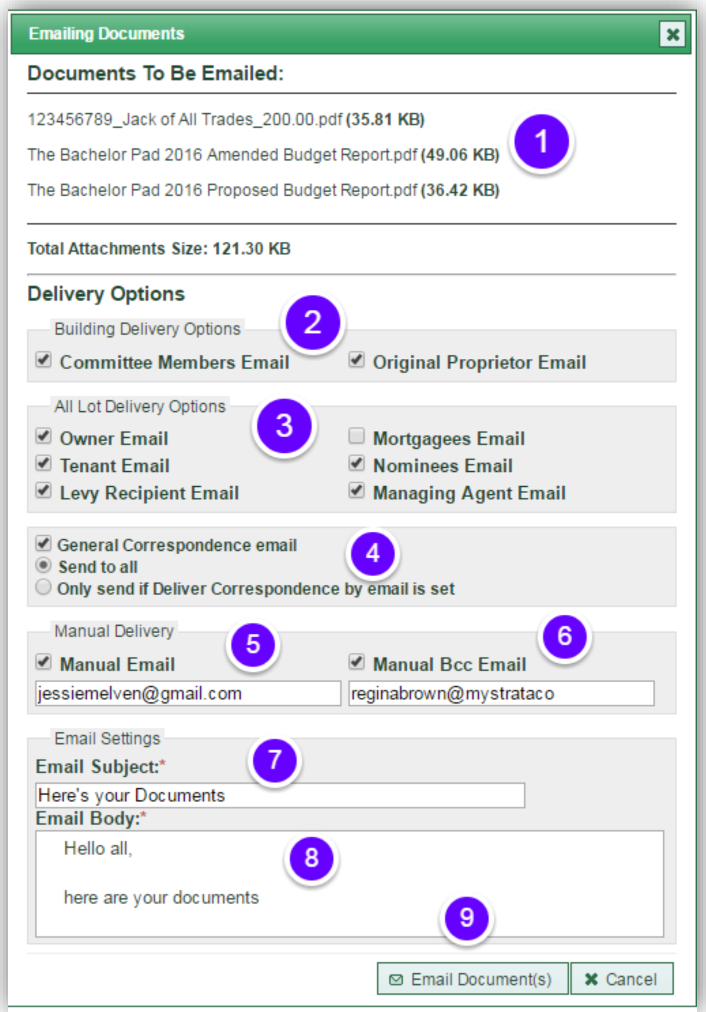


1. If you are uploading PDF documents you will see preview of each document. These documents are pending full upload. You can have more than one document pending full upload by using the arrows to move between documents
2. Click *Delete* to remove a pending document
3. Click *Refresh* to refresh the 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*


Document Entry
Borg Valuations Pty Ltd
Valuation for 15 Florence Avenue, Hornsby NSW 2077
Document 1 of 1
Delete
Refresh
Upload Document
Show Docs By Current User
Date 04/12/2017
Name Valuation for 15 Florence Avenue, Hornsby.pdf
Size 85.76 kB
C.T.S. 888777 Hornsby Towers
Schedule Main Contribution Schedule
Lot
Supplier Borg Valuations
Document Type* Valuation
Comments Valuation 1.12.2017
Download
Print
Save
Close
1 selected

EMAILING THE DOCUMENT

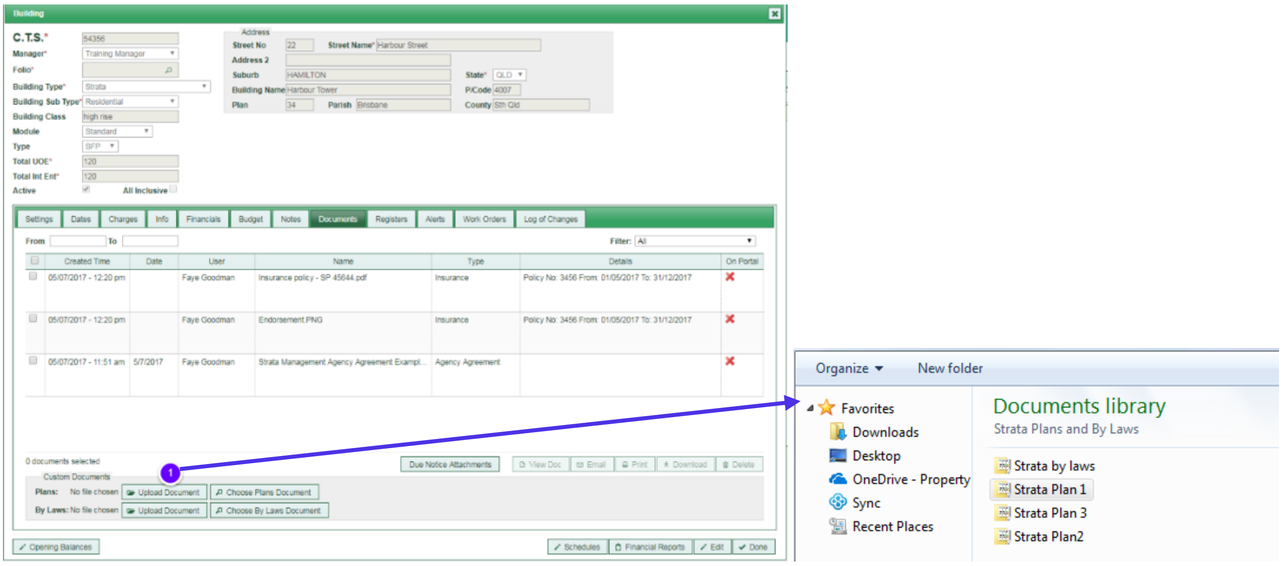
1. The documents that are being emailed show here. Check that you have the correct document here
2. Click to select the building delivery options
3. Click to select the lot delivery options
4. If this is a general correspondence email you have the choice to email to all recipients *or* only email to 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



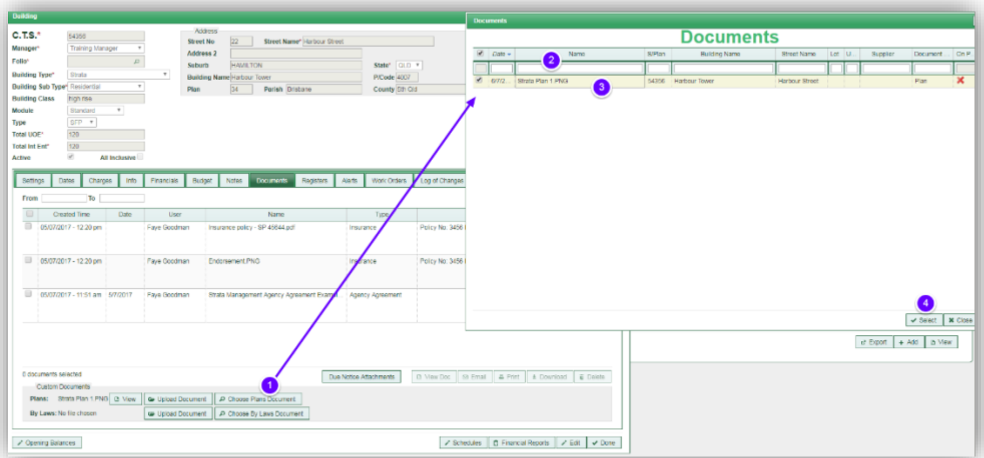
PLANS AND BY LAWS DOCUMENTS

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

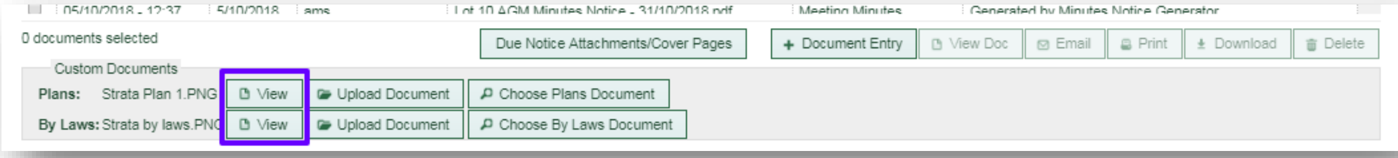
Click *Upload* to upload a document from your computer that isn't already saved in the building's documents



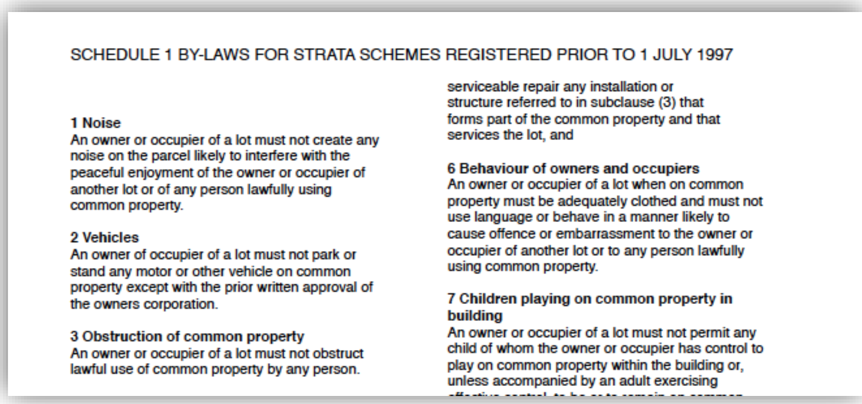
1. Click *Choose Plans Document* or *Choose By-Laws Document* to select a document that is already saved in PropertyIQ for that building
2. Type some key letters in any of the empty boxes on the top line to refine your search
3. Click on a document to highlight it, and then double click to select it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



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



This opens a PDF in a new Tab



SCHEDULE 1 BY-LAWS FOR STRATA SCHEMES REGISTERED PRIOR TO 1 JULY 1997

1 Noise
An owner or occupier of a lot must not create any noise on the parcel likely to interfere with the peaceful enjoyment of the owner or occupier of another lot or of any person lawfully using common property.

2 Vehicles
An owner of occupier of a lot must not park or stand any motor or other vehicle on common property except with the prior written approval of the owners corporation.

3 Obstruction of common property
An owner or occupier of a lot must not obstruct lawful use of common property by any person.

serviceable repair any installation or structure referred to in subclause (3) that forms part of the common property and that services the lot, and

6 Behaviour of owners and occupiers
An owner or occupier of a lot when on common property must be adequately clothed and must not use language or behave in a manner likely to cause offence or embarrassment to the owner or occupier of another lot or to any person lawfully using common property.

7 Children playing on common property in building
An owner or occupier of a lot must not permit any child of whom the owner or occupier has control to play on common property within the building or, unless accompanied by an adult exercising