



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

RFERS PARADISE

State* QLD

ings on Cavill

P/Code 4217

976

Parish SURFERS PARADISE

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

[illegible]

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

Committee

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

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, Waila. 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

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

ADDING COMMITTEE MEMBERS

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.

1. If the committee/council member is linked to a lot, click here to open the lot owner card
2. Use the search icon to find and select a lot owner if the committee/council member is a lot owner.
3. If the committee member is linked to a lot owner, you can view the lot here
4. **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
5. The committee member's name shows here
6. Select their position from the dropdown list
7. If this is a multi-OC building and this member is a committee member for a single-OC, select the schedule
8. Select here if they are a representative of the lot
9. Select here if they are a sub-representative of the lot
10. Select here if this person has the 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 emailed an invoice approval request.
11. Enter a salutation for any correspondence
12. Enter the date this person was appointed
13. If the person resigns from the committee, enter the date of their resignation here
14. Select here if this person receives a copy of financial documents ben generating in bulk from the Reporting menu
15. Select here if this person receives a copy of work orders when you send them to suppliers
16. Select here if this person receives a copy of insurance claims when you send them to insurers
17. If you don't sync with the lot card, you can update any of the address details for this person here
18. If you don't want to sync with the lot owner information you can update any of the contact details for this person here
19. Tick their preferred delivery method for committee related correspondence
20. You can record notes here that relate to the person's committee member role.
21. 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.
22. Click *Save* when done.

The screenshot shows the 'Committee Member' form with the following fields and callouts:

- 1**: Lot dropdown (9/9 Bailey Brown)
- 2**: Search icon for lot owner
- 3**: View Lot button
- 4**: Sync With Lot Owner button
- 5**: Name field (Bailey Brown)
- 6**: Position dropdown (Member)
- 7**: Schedule dropdown (OC 3)
- 8**: Rep checkbox
- 9**: Sub Rep checkbox
- 10**: External Approver checkbox (checked)
- 11**: Salutation dropdown (MR)
- 12**: Appointed date field (23/07/2019)
- 13**: Resignation date field
- 14**: Financial Reports Recipient checkbox (checked)
- 15**: Work Order Recipient checkbox
- 16**: Insurance Claim Recipient checkbox
- 17**: Address Unit field (Unit 1/15 Florence Street)
- 18**: Suburb field (BALLARAT)
- 19**: State dropdown (VIC)
- 20**: Post Code field (3127)
- 21**: Home Phone field (9534 3232)
- 22**: Fax field
- 23**: Work Phone field
- 24**: Mobile field (0412 544 344)
- 25**: Email field (mystratacustomers@gr)
- 26**: Delivery Method section with Email (checked) and Post checkboxes
- 27**: Note text area
- 28**: SMS button
- 29**: Save button
- 30**: Cancel button

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 with the following fields and sections:

- Committee** (Section 1)
- Building Information** (Section 2)
 - Total lots in scheme: 4 (Primary - 4, Secondary - 0) (3)
 - No. of Residential Lots: 4 (2)
 - No. of Commercial Lots: 0
 - No. of Retirement Lots: 0
 - No. of Utility Lots: 0
 - No. of Other Lots: 0
- StrataHub Settings** (Section 9)
 - Chairperson can update records: ☐ (9a)
 - Exclude from StrataHub: ☐ (9b)
- Insurance** (Section 4)
 - Insurance Replacement Value: \$2,840,000.00 (4)
 - Last AGM Date: 14/08/2023 (5)
 - Balance of Capital Works fund (from last financial year): \$7,480.00 (6)
 - Has a Strata Renewal Committee been Established? ☒ (7)
 - Date of Establishment: 01/04/2024 (8)
- Buildings** (Section 10)
 - Building #1
 - Building Reference: 100 Daisy Street (10)
 - Number of Storeys Above Ground: 2 (11)
 - This is a Class 2 Building: ☐ (12)
 - Annual Fire Safety Statement Date: 01/02/2024 (13)
 - Interim Occupation Certificate Date: (14)
 - Final Occupation Certificate Date: 06/07/2022 (15)
 - This Building Has a NABERS Rating: ☒ (16)
 - Energy Rating: 5
 - Indoor Rating: 4
 - Waste Rating: 3
 - Water Rating: 2
- + Add Building** (17)

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.
 - 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

S/Corp*

4345

Manager*

Anne Fluva

Folio*

Building Type*

Strata

Building Sub Type*

Residential

Building Class

Total UOE*

120

Active

☒

Debt Collection

☒

All Inclusive Fees

☐

Payment Plan

☐

Address

Street No

2

Street Name*

Dorinda Place

Address 2

Suburb

PORT AUGUSTA

State*

SA

Building Name

Dorinda Waters

P/Code

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

Address

101 High Street
SYDNEY NSW 2000

Phone

102 76676777
202 76676988

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 'Suppliers' window with a table of suppliers. The 'Value' column has a dropdown menu with 'ABC Valuers' selected. A purple arrow points from the 'Insurance Valuation' field in the 'Building' window to the 'Value' dropdown menu.

Supplier Name	Supplier Co.	Balance	Type	Suburb	Phone	Mobile	ABN	Compliance
Dean Scarce Electrical PL	DEANSELEC	\$19,641.86	Removalist		03 9856 5264	+61414392...	80975685212	✓
Adam Plumber		\$352.00	Removalist	PARRAMATTA	0424515115	9856324		✓
ABC Valuers		\$0.00	Valuer	SYDNEY	02 76676777	042876543	57558888	✓

Insurance Valuation: \$3,000,000.00
Valuation Date: 01/04/2017
Value: ABC Valuers

Value Details:
Name: ABC Valuers
Address: 101 High Street, SYDNEY NSW 2000
Phone: 102 76676777
Mobile: 042876543
Email: john@abcvaluer.com

ADDING AN INSURANCE POLICY

+Add to get started

The screenshot shows the 'Insurance' tab in the 'Building' window. The 'Add' button is highlighted with a purple box.

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

Insurance Valuation: \$3,000,000.00
Valuation Date: 01/05/2017
Value: ABC Valuers

Value Details:
Name: ABC Valuers
Address: 101 High Street, SYDNEY NSW 2000
Phone: 102 76676777
Mobile: 042876543
Email: john@abcvaluer.com

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.

The screenshot shows two windows from a software application. The 'Insurance Policy' window on the left contains various input fields for policy details, with callouts 1 through 6 highlighting specific areas. The 'Insurers' window on the right displays a table of insurers with callouts 7 through 11 highlighting the table and its action buttons. A purple arrow points from callout 6 to the 'Claims Dept Email' field in the 'Insurance Policy' window.

Insurance Policy Window:

- Insurer Details:**
 - Policy Number: 4345 (Callout 1)
 - Period From: 15/08/2018 To: 14/08/2019 (Callout 4)
 - Contact: Petrina Fenech (Callout 2)
 - Active: ☒ (Callout 3)
 - Renewal Date: 15/07/2018 (Callout 5)
 - Insurer: [Search Icon] (Callout 6)
- Insurance Company:**
 - Address, Suburb, State, Post Code
 - Phone 1, Phone 2, Fax, Email, Claims Dept Email
- Insurance Broker:**
 - Address, Suburb, State, Post Code
 - Phone 1, Phone 2, Fax, Email
- Commission:**
 - Actual: \$0.00 Anticipated: \$0.00
- Insurance Policy Document:**
 - Upload Policy Document, Select Policy Document
- Endorsement Document:**
 - Upload Endorsement, Select Endorsement
- Note:** [Text Area]
- Premium Details:**
 - Premium: \$0.00 Date Paid: [Field]
 - Amount Paid: \$0.00
- Coverage Details:**
 - + Add Cover
- Buttons:** Save, Cancel

Insurers Window:

Company Name	Phone 1	Phone 2	Fax	Note
CGU Insurance	02 8569 4521	02 5468 6589	02 5426 8596	(Callout 7)
AAMI				
Suncorp	0398765678			Note found on the...
Insurance Alliance				
CHU	1300 361 263		1300 361 269	

Buttons: + Add, View, Edit, Select, Close (Callouts 8-11)

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 Phone 1: 02 8569 4521

Suburb: RICHMOND Phone 2: 02 5468 6589

State: NSW Fax: 02 5426 8596

Post Code: 4526 Email: 1_email@deadend.piq

Claims Dept Email: 1_claimsEmail@deadend.piq

Broker: (1)

Insurance Broker

Address: Phone 1: Phone 2:

Suburb: Fax:

State: Email:

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

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)

+ Add View Edit Select Close

+ Add View

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

Active
☒

Renewal Date
01/07/2018

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:
Kinnane Insurance Broke

Insurance Broker
Kinnane Insurance Brokers

Address
762 The Plaza

Suburb
FITZROY

State
VIC

Post Code
3256

Phone 1
103 5264 8569

Phone 2
203 9745 6523

Fax
03 9744 5264

Email
1_email@deadend.piq

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

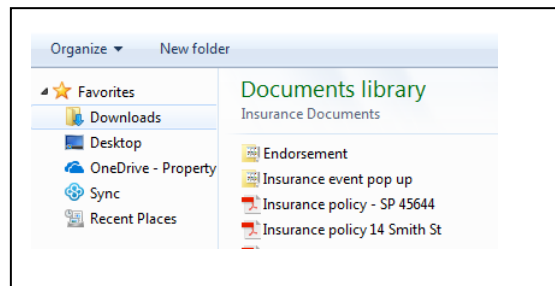
1. Choose the type of cover from the dropdown list
2. Enter the sum insured
3. Enter the amount of weekly premium payable (if paid weekly)
4. Enter the amount of excess payable if you make a claim
5. Enter any additional notes here
6. You can delete the cover here (This does not delete the whole policy,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

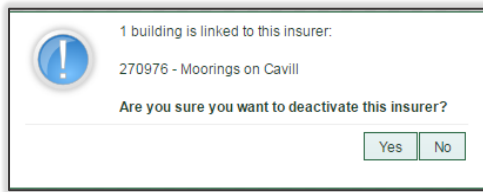
UPLOADING INSURANCE DOCUMENTS

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.

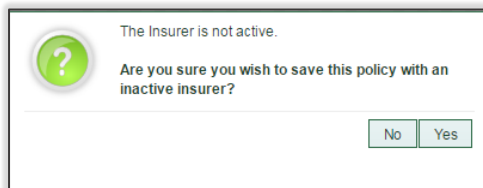


NOTE ABOUT INACTIVE INSURERS

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)

The screenshot displays the PropertyIQ software interface. The main window shows building details for 'S/Plan* 283423' and 'Morada Place'. A purple arrow points from the '+ Add Investment Account' button (callout 1) in the main window to the search bar (callout 2) in the 'Bank Accounts' window. The 'Bank Accounts' window shows a table of accounts with columns: Account No., BSB, Account No., Admin Balan..., Sinking Bala..., and Balance. The table lists several accounts, including 'owners of S...', 'SP 16', 'Additional ac...', and 'SP 73074 A...'. At the bottom of the 'Bank Accounts' window, there are buttons for '+ Add' (callout 3), 'View' (callout 4), 'Select' (callout 5), and 'Close'.

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

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

The screenshot shows the 'Building' form on the left and a 'Building Management Committee' pop-up on the right. Numbered callouts indicate the following steps:

1. Select the type of association/committee you want to enter (in the 'Community Association / Precinct Association / Building Management Committee' section).
2. Enter the name of the association/committee (Name of Building Management Committee*).
3. Enter the address of the association/committee (Address for service of notices).
4. Enter the date the association/committee levies were determined (Date Determined).
5. Enter the date levies due to the association/committee are paid to (Paid To).
6. Enter the amount of any arrears owed to the association/committee (Current Arrears).
7. Enter any amounts that have been paid in credit (advance) to the association/committee (Current Credit).
8. You can enter the details of any levies due here (in the table below).
9. Save (Save button).

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](#)

VIEW 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 Plan

☐

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' 10, Manager 'AMS Mick', and Address '13 Mire Drive'. 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 circled 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 row for 'The Plaza' is highlighted with a blue circle and the number 4. The 'Select (1)' button is circled with a blue circle and the number 5, and the 'Close' button is circled 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). Below this is the '+ Add Other' button. A modal form titled 'Other Building' is open, showing fields for O/Corp Number, Building Name, Strata Manager Name, Strata Manager Address, and Description. The 'Save' button is at the bottom right of the modal.

Building Form Fields:

- O/Corp*: 45654
- Related Buildings: ✓
- Manager*: Brendan Comiskey
- Folio*: VIC BRANCH
- Building Type*: Strata
- Building Sub Type*: Residential
- Building Class: Services Only ☐ Tier 5
- Total UOL*: 100
- Total UOE*: 100
- Active ☒ All Inclusive Fees ☐ Debt Collection ☒ Payment Plan ☐
- Address: Street No 123, Street Name Bass Street, Address 2, Suburb MELBOURNE, State VIC, Building Name Jade Apartments, P/Code 3000
- Total Lots - 5 (Primary - 1, Secondary - 4)

Other Building Modal Fields:

- O/Corp Number*: OC4
- Building Name*: Green Apartments
- Strata Manager Name: ABC Strata Management
- Strata Manager Address: 1 Green Avenue, Melbourne VIC 3000
- Description: OC4 in Plan1234. OC Manager is Jane Smith.

Related Buildings Table:

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

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

+ Add Remove Print View

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?

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 (VIC BUILDINGS)

NOTE: This feature is available on the building card for buildings with the State set to VIC.

To improve efficiency and better assist Victorian clients with their disclosure requirements, six (6) fields are available on the building card to help record important building information. Each data field has a corresponding merge field that can be inserted into the Victorian OC Certificate template and will allow this information to be pre-filled for each certificate generated.

- **Info Certificate accordion & data fields** available under *Building card>Info tab>Info Certificate accordion* where you can record information that needs to be disclosed on all OC Certificates.
- **Merge fields** are available under *File>Templates>Standard Email Templates>VIC>OC Certificate template*.
 - The 6 merge fields are {{&Building_Repairs}}, {{&Building_Liabilities}}, {{&Building_Leases_Licenses}}, {{&Building_Orders}}, {{&Building_Proceedings}} and {{&Building_Other_Info}}.
 - They're available in the merge field list for you to use in your OC Certificate template as required.

See below for further instructions.

1. [Step 1 of 2 - Add detail to certificate data fields](#)
2. [Step 2 of 2 - Add merge fields to OC Certificate template](#)

STEP 1 OF 2 - ADD DETAIL TO CERTIFICATE DATA FIELDS

1. On the building card, go to the *Info* tab
2. Click on the *Info Certificates* accordion
3. **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 OC Certificate template.
4. **Liabilities** - Here you can record details of any liabilities and contingent liabilities of the OC. Any information entered here will be shown in the merge field {{&Building_Liabilities}} in the OC Certificate template.
5. **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 OC Certificate template.
6. **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.
7. **Notices & Orders** - Here you can record details of any notices or orders served on the OC 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 OC Certificate template.
8. **Legal Proceedings** - Here you can record details of any legal proceedings to which the OC is a party and any circumstances the OC is aware that are likely to give rise to proceedings. Any information entered here will be shown in the merge field {{&Building_Proceedings}} in the OC Certificate template.
9. **Other Information** - Here you can record any other details or general information that may need to be disclosed by the OC. Any information entered here will be shown in the merge field {{&Building_Other_Info}} in the OC Certificate template.

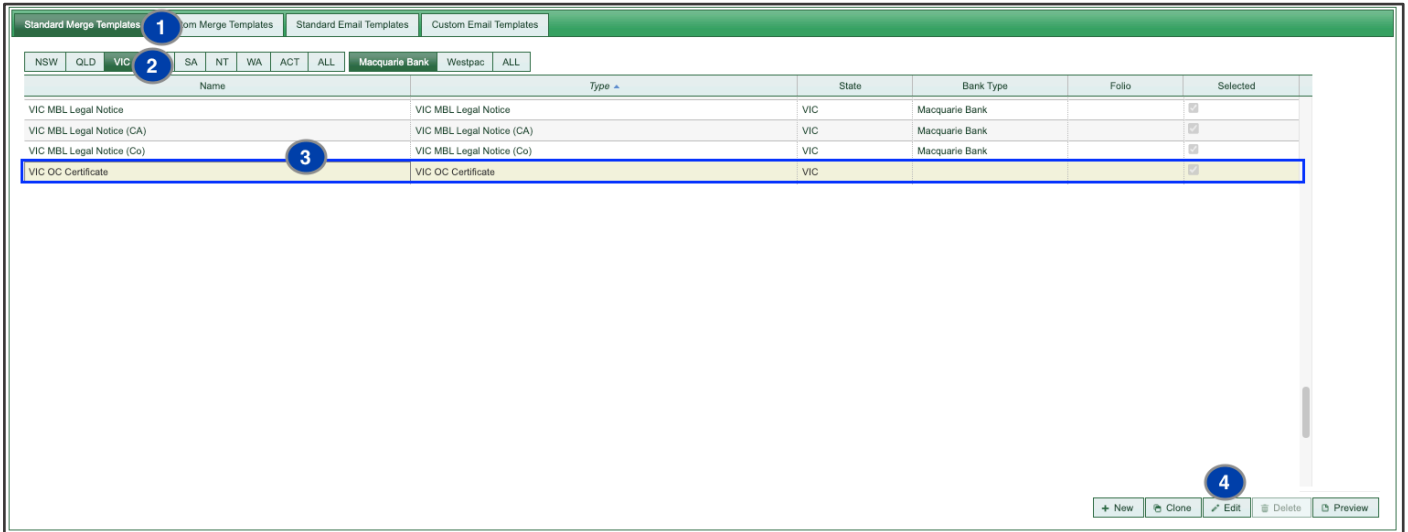
The screenshot displays the 'Info' tab in the PropertyIQ Buildings interface. The 'Info Certificates' accordion is expanded, revealing several text input fields for recording details. Numbered callouts (1-9) are placed over the interface to correspond with the instructions:

- 1**: Points to the 'Info' tab in the top navigation bar.
- 2**: Points to the 'Info Certificates' accordion header.
- 3**: Points to the 'Repairs & Maintenance' text input field.
- 4**: Points to the 'Liabilities' text input field.
- 5**: Points to the 'Leases & Licenses' text input field.
- 6**: Points to the checkbox labeled 'Include leases and licenses register report in certificates'.
- 7**: Points to the 'Notices & Orders' text input field.
- 8**: Points to the 'Legal Proceedings' text input field.
- 9**: Points to the 'Other Information' text input field.

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

STEP 2 OF 2 - ADD MERGE FIELDS TO OC CERTIFICATE TEMPLATE

1. To update your OC Certificate template, go to *File>Templates>Standard Merge Templates* screen
2. Select the *VIC* State filter to view templates specific to Victoria (if not already selected)
3. Find and click on the relevant OC 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. They're positioned under the existing merge field `{{Committee_Treasurer_Name}}`
6. Insert them into your template where applicable
7. Click the Save button to save your changes

