PropertyIQ

Quick guide to adding a building – Western Australia

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INTRODUCTION TO BUILDINGS

The buildings card stores all the information relating to each Strata Building. The buildings area interacts with all areas of PropertyIQ Strata.
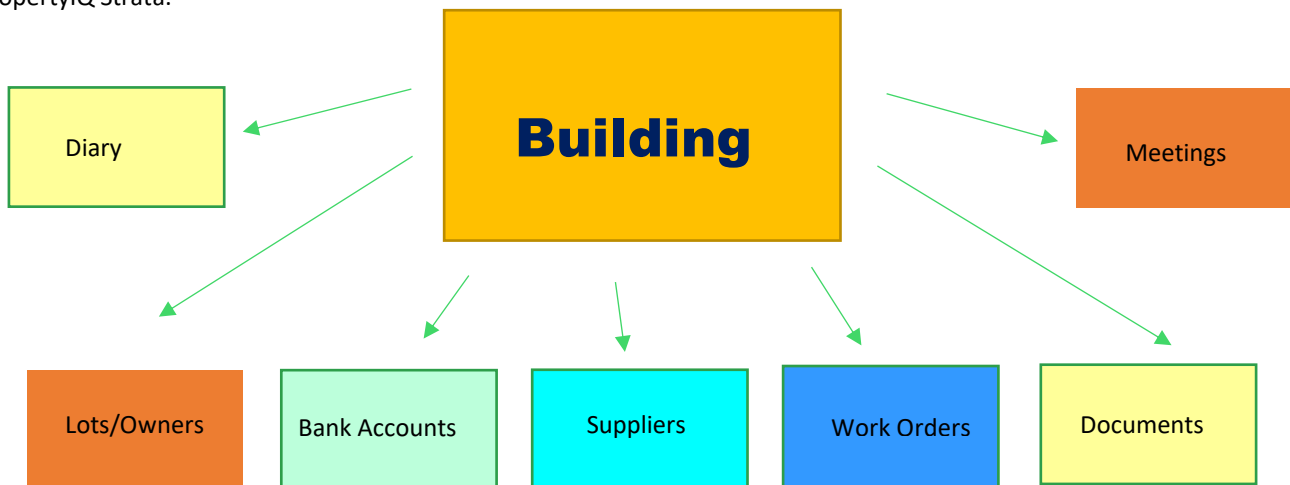
The building card holds all the information about the buildings you manage. There are separate manuals for each tab in the building card.

Settings – bank account, tax status, interest and discounting rules and important contacts

Dates – Important dates such as AGM and financial year

Charges – your fixed and variable management fees.

Info – Committee members, tradespeople, Insurance, Investment accounts, internal committees.

Financials – balances and owner positions, create and manage contribution schedules

Budget – planning and implementing the expenditure and income for a building

Notes – here you can add, edit and view any notes relating to the building

Documents – view, email and print all documents relating to the building

Registers – keep track of assets, lot authorisations, contracts and funding proposals

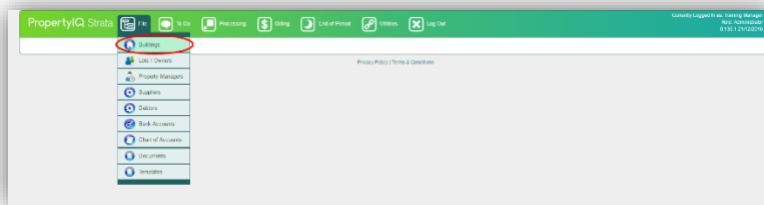Alerts – create and manage alerts for important events

Work Orders – view and edit work orders for the building

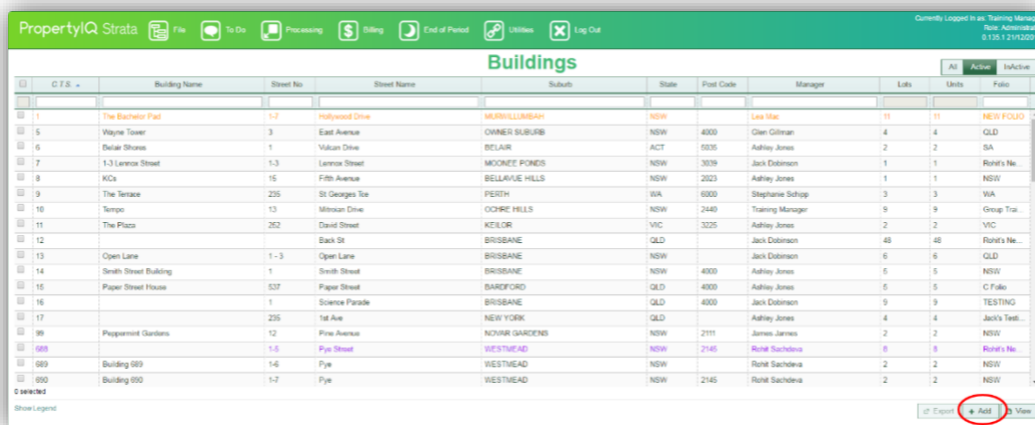Log of Changes – view a change log for the building

ADDING A NEW BUILDING

To add a new building go to and select Buildings

Select *+Add* at the bottom of the screen

BUILDING DETAILS

1. First step is to select the state from the dropdown list first. This determines other available fields and settings that are specific to that state
2. Enter the Strata Plan number
3. Select the strata manager from the dropdown list. This list shows all users in your company (or folio) that have strata manager ticked on their user profile
4. If you use folios in your company, select the the folio from the dropdown list
5. If you have selected a folio but want to remove it, use the trash symbol
6. Select the building type from the dropdown list. The building types available are specific to Western Australia. Your selection affects the terminology and layout of documents such as levy notices and meeting agendas.

7. Select the building sub-type from the dropdown list.
8. Enter a building class (optional)
9. Enter the total units of entitlement for the building
10. The building is *active* by default. You can untick to make the building inactive if you no longer manage it
11. *Debt collection* is selected by default. Leave this ticked if you want this building to be included when you process a due notice run that includes arrears, final or legal notices. Only untick this if you are not conducting any debt colleciton activity for this building
12. Select *all inclusive fees* if your fees for managing this building are all inclusive. For example, if you don't charge extra for phone calls or photocopying. This is just a reminder for you not to charge extra fees, it doesn't affect your charges or fee schedules.
13. If *debt collection* is ticked, you can also tick here to include a payment plan statement that will show whenever Arrears, Final or Legal notices are sent. A global payment plan statement is entered your application settings and you must also have the correct merge field set up on your notice template for this wording to show on your notices. See the manuals "Settings" and "Templates" for full details
14. Enter the building address details here
15. If you have ticked Payment Plan, and you have a global payment plan statement entered in your application settings, you can enter payment plan details here that only apply for this building. The wording you enter here will override the global payment plan statement when printing notices for this building only.

NOTE
You need to complete all the fields with an asterisk on the main screen (except folio) and at least the financial year, levy year, levy frequency and attach a bank account to the building before you can save the building. All other information can be added later.

DATES TAB

1. Enter the first day of the current financial year here (required)
2. Enter the date of the next AGM here (optional)
3. Enter the date of the first AGM here (optional)
4. Enter the date of the last AGM here (optional)
5. Enter the levy year start date here (required)
6. Ener the levy frequency here (required)
7. Enter the number of pre-issue levies here. You can enter up to 4 pre-issues. For full details about pre-issues, see the manual "Budgets"
8. Enter the date the building was first registered here (optional)
9. Enter the date the building was built (optional)
10. Enter the date you acquired the management of the building (optional)
11. If you no longer manage the building, you can record the date here. (You will also need to make the building inactive once you have completed all the necessary steps to close a building.)
12. Click here to add custom dates for the building. Any dates you set here will appear as reminders in the diary.

ATTACHING A BANK ACCOUNT

You need to attach a main bank account to the building before you can save it.

For detailed information on the other tabs, please refer to the other *Buildings* manuals -

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Charges
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Financials
Budget
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Registers
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Opening Balances