CondoLogie

CondoLogy

A full procedure manual for an administrative science application that does everything for the condominium!

2024v0117

Operation procedure

Message to administrators.

CondoLogy is the science behind the administration of apartments commonly referred to as "Condo". All owners of private real estate have the freedom to maintain according to their wishes, their rhythms or quite simply to let go of the condition of their buildings until their destruction.

In a condominium it's impossible... The preservation of the common good prevails!

It is not the administrators of the board of directors who impose it, it is the law! The **Civil Code of Quebec** from approximately article 1785, the **Condominium Act 1998** in Ontario or the common law in Canada provides and regulates the administration of condominium units and ensures that the preservation of the common good is ensured in the short, medium and long term. Your deed of condominium personalizes your condominium for these regulations but the heart of your deed of condominium comes from the **Civil Code of Quebec**, the **Condominium Act 1998** in Ontario or the common law in the rest of Canada.

CondoLogy is an application that offers an overview of the administration from its Summary page and offers the opportunity to save time and money by offering co-owners an ultra-detailed transparent administration in Micro Mode if the administrators wish it or in Macro mode. These Modes compile various expenses by placing a percentage of these expenses in the contingency fund.

More and more Micro administrations will be required from the Boards of Directors Macro. That is to say, administrations where all the items of the building will be compiled with transparency.

When the balance of finances is obtained, the maintenance of the building is visibly good and the co-owners are certain to contribute to the common expenses, including the contingency fund in an equitable manner, disputes are remote and this is harmony!

Let's go and enjoy CondoLogy!

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Legend

CondoLogy user procedure manual is a constantly evolving document. A legend is created for forms and form sections;

In force.	The procedure applies and is in force
Under study.	The procedure applies and is in effect but will be modified
In Change.	The procedure is being modified

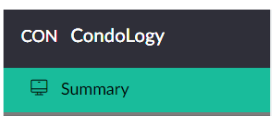
Note: We strongly suggest that you follow the order of procedure in order to get all the automatic calculations programmed.

In **Condology;**

1- **Contingency Fund** or **Provident Fund** or **Reserve fund** are used and called **PCF**.
2- **Self-Insurance** or **Auto-Insurance** can be used and called **SIF**.

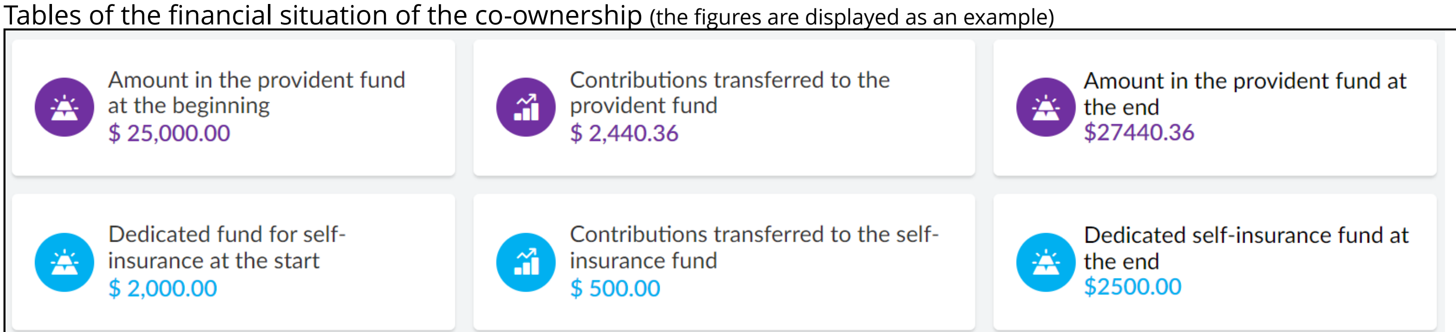
Summary

In force.



Summary is a page that includes real-time reports, graphs and calculations on the administrative situation of the condominium.

Tables of the financial situation of the co-ownership (the figures are displayed as an example)



In purple; Amount associated with the Provident Fund called at **CondoLogy PCF**
In blue; Amount associated with the Self-Insurance Fund called at **CondoLogy SIF**

Description of the condominium Report *

This unique form is used to identify the condominium. Once completed in the first place of any other form, it is not possible to create a second one. It can be edited, printed, etc...

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Statement of general financial position.

$ 2,500.00
Amount in hand at the beginning

$ 14,111.82
Total contributions paid

$50.00
Incomes

$ 0.00
Collection

$16661.82
Total income and/or receipts

Budget item Report

This is the list of items that makeup the functioning of the administration of a building. These items can be components, a set of components, equipment and/or a set of equipment as well as supplies and professional services that are used to maintain the building and maintain the common good.

Certain calculations of the Budget Items form the budget in order to establish the common charges (condo fees) allocated to the private units and paid by the co-owners.

Statement of general financial position.

$ 0.00
Total unpaid dues

$ 0.00
Total unforeseen budget items

Contributions transferred to the provident fund
$ 2,440.36

Contributions transferred to the self-insurance fund
$ 500.00

$ 3,469.38
Total budget items paid

$10692.44
Surplus or deficit

$13192.44
Amount in hand at the end

Register of condominium Report

This is the list of co-owners, the detailed description of private units and common areas for restricted use called in **CondoLogy** ACUR.

Automatic calculation of the sum of the shares of the private units of the condominium.	100 Total of condominium shares

Total shares and statement of contributions

100 Total of condominium shares		
$ 24,988.73 Total transactions payable	$ 14,111.82 Total Breakdown of Paid Transactions	$ 10,876.91 Balance of transactions payable
$ 446.05 Total NSF Returned Transactions	$ 446.05 Total returned transactions paid	$ 0.00 Balance of NSF returned transactions to be paid
$ 50.00 Total fees payable	$ 50.00 Total fees paid	$ 0.00 Balance of fees to be paid
$ 3,158.74 Total special contributions payable	$ 3,158.74 Total special contributions paid	$ 0.00 Balance of special contributions payable
$ 10,876.91 Balance payable		

Complaint management

This form is for complaint management. It is very useful to have an overview of the hot issues in which stakeholders are active in order to resolve certain complaints and/or problems associated not only with the building but also with the tranquility and/or safety of the inhabitants.

(Board of Directors) activity register

This form is used as a record of board activities. An overview allows you to quickly see the tasks performed. This registry has a powerful search engine that can group together similar types of activities.

This form can communicate by auto-email directly with one or all of the co-owners as well as the bidders until the work is completed.

Register of contractors

This form is used as an archive of contractors and/or service providers. It can be completed directly from the form or conveniently completed when preparing Budget Items under the **Supplier Name field.**

Register of Syndicates

This section is to be complete right after the upload of the Budget Items... Here's why. Some of the expenses that will build the budget can be redistributed between different Syndicates.

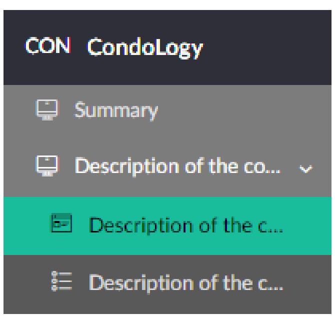
These syndicates need to be identified before the budget items are built the budget in case an expenses will be redistributed.

Default data import

CondoLogy has produced Importers which are actually Excel files containing lists of Building Items and Contractors. You will automatically receive these Importers when the Description of the co-ownership has been completed.

Description of the condominium *

In force.



This section is used less often but **should be completed first.** Once the registration of the condominium is completed, it will not be possible to complete a second file unless the one created is deleted.

Some fields still contain essentially the same content, but it may be necessary to make a change at the level of the board of directors or a change at the level of the parameters of the condominium and/or of the assets. Then, when the year of administration changes, the cost of maintaining the common areas will have to be automatically recalculated.

Section; Condominium name: This section of the form allows you to describe the physical location of the condominium.

Field name	Description	Mandatory
Administration started on	Date of the beginning of the administrative year	Yes
Administration finished on	Administrative year end date	Yes
Legal name of the condominium	Legal name of the syndicate of condominium	Yes
Condominium address	The legal address of the syndicate of condominium	Yes
Condominium phone*	Telephone of the syndicate of condominium	Suggested
Condominium Email*	Communication email with the syndicate of condominium	Yes
Deed of co-ownership	Upload a scanned document of the deed of condominium	Suggested
Publication date	Date of publication in the public register	Suggested

Act publication number	Official number of the publication of the deed of condominium	Suggested
Building plan	Upload the official digitized plan of the condominium building	Suggested
Certificate of location	Upload the digitized certificate of location of the syndicate of condominium	Suggested
Total assets of the co-ownership	Automatic calculation of the total breakdown of the assets of the condominium	Automatic
Provincial Government number	Enter the business number registered in Quebec	Suggested
Government URL	Internet address of the Government of Quebec	Suggested
Federal business number	Enter the business number registered in Canada	Suggested
Federal Government URL	Government of Canada Internet address	Suggested

It is best to have the deed of co-ownership in hand when administering a condominium!

Indicate the start date of the current administration. Indicate the end date of the current administration.	Administration started on yyyy-MM-dd Administration finished on yyyy-MM-dd
Legal name of the condominium *	Enter the legal name of the condominium.
Enter the address of the condominium.	Condominium address Address, unit City Province Postal Code
Condominium phone * +1 506-234-5678 Condominium Email *	Enter the condominium's telephone number and email address.
Upload the deed of condominium in Word or PDF format. Enter the date of publication. Enter the publication number.	Deed of co-ownership Sélectionner un fichier Publication date yyyy-MM-dd Act publication number

Building plan Sélectionner un fichier Certificate of location Sélectionner un fichier	Upload the building plan. Upload the certificate of location.
Automatic calculation of the breakdown of the assets of the condominium.	Total assets of the co-ownership #,###,###.## $
Provincial Government number Government URL https://	Government registration number of the condominium AND the URL of the Government site.
Government registration number of the condominium AND the URL of the Government site.	Federal business number Federal Government URL https://

Section; Condominium Insurance

Enter details of the syndicate's share of insurance coverage. In the Register of condominium, fields have been provided to register the individual insurers of the co-owners to cover their private units.

Field name	Description	Mandatory
Beginning of coverage	Enter the start date of the insurance coverage	Yes
Police number	Insurance contract number	Yes
Insurer URL	The website address of the insurer	Suggested
End of coverage	Enter the end date of the insurance coverage	Yes
Deductible amount	Amount to be paid by the syndicate in the event of a claim	Suggested
Insurer customer portal URL	The internet address of the insured's portal	Suggested
Insurer	Insurance company name	Yes
Insurance policy	Uploaded the digitized insurance contract (PDF, Word)	Suggested
Document URL	Add the Internet address of the insurance contract if applicable	No

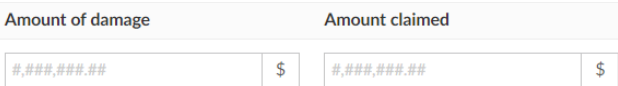
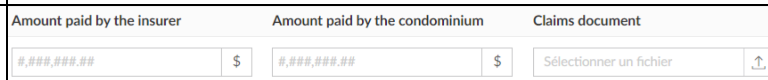
Beginning of coverage yyyy-MM-dd Police number Unsurer URL https://	Enter the start date of the insurance coverage. The insurance policy number. Enter the insurer's URL.
Enter the end date of the insurance coverage. Enter the deductible amount of the insurance policy. Enter the URL of the insurer's customer space.	End of coverage yyyy-MM-dd Deductible amount #,###,###.## $ Insurer customer portal URL https://
Insurer Assurance bâtisse Insurance policy Sélectionner un fichier Document URL https://	Enter the name of the insurance company. Upload insurance policy. Enter the URL of the insurer's document if applicable.

Section; Claims history

This sub-form archives the history of contacts with the insurer and the claims made by the syndicate of condominium, if applicable. You can come back to build the history or start it only after the registration of the condominium.

Field name	Description	Mandatory
Date of claim	Enter the date of a claim made to the insurer	Yes
Description	Briefly describe the nature of the contact with the insurer	Yes
Amount of damage	Enter the claim assessment amount	Yes
Amount claimed	Enter the amount claimed from the insurer	Yes
Amount paid by the insurer	Enter the amount paid by the insurer	Yes
Amount paid by the condominium	Enter the amount paid by the syndicate of condominium	Yes
Claims document	Uploaded Scanned Insurance Report document (PDF, Word)	Suggested

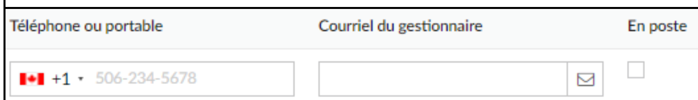
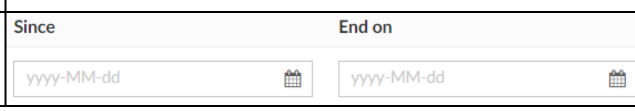
Enter date of claim & description.	Date of claim Description yyyy-MM-dd

	Enter the amount of damages & the amount claimed.
Enter the amount paid by the insurer, the amount paid by the condominium & upload the claim document.	

Section; Manager(s)

If an external management firm is associated with the management of the condominium, list the managers involved in the file.

Field name	Description	Mandatory
First and last name	Newest file after current year	Suggested
Title	File older than 3	No
Telephone or mobile	File older than 2	Suggested
Manager Email	File older than 1	Suggested
In office	Checkbox that confirms a person in office	Yes
Since	Term start date	Suggested
End on	Term end date	Suggested

Enter the first and last name + the title of the manager in the file.	
	Enter the manager's telephone and/or mobile, e-mail address + tick if he is in post.
Enter the start date and the end date.	

Section; Current Board of Directors

The board of director section is for ease of archiving and reference of all performed activities. Board members perform their administrative role on the condominium as part of their duties.

Field name	Description	Mandatory
First name-Last name 1	Name and surname of the elected	Yes
Role of the elected 1	Position of the elected member of the board of directors	Yes
1 Elected since	Indicate since when the member has been elected	Yes
Signatory to bank account 1	Indicate whether or not the elected board member is a signatory to the bank account	Yes
Telephone or mobile 1	Telephone of the elected member of the board of directors	Yes
E-mail 1	E-mail address of the elected member of the board of	Yes

	directors	
	and so on. Six board members can be listed.	Suggested

Enter the administrator's first and last name. Register the role of the administrator.	First name-Last name 1 Role of the elected 1 - Sélectionner -
1 Elected since yyyy-MM-dd Signatory to bank account 1 - Sélectionner -	Indicate the date of the beginning of the mandate of the elected official. Indicate whether the administrator is a signatory at the bank.
Enter the administrator's telephone number. Enter the administrator's email.	Telephone or mobile 1 +1 506-234-5678 Email 1

There are a total of 6 spaces for administrators identical to the first. Complete all necessary spaces that represent the current board of directors.

Section; Parameters of the Condominium

It is the general description that makes up the condominium building.

Field name	Description	Mandatory
Left column		
Number of units	Number of private units in the condominium	Yes
How many floors	Number of floors in the condominium building	Yes
Number of elevators	Number of elevators in the building	Yes
Number of outdoor parking spaces	Number of delimited parking spaces registered in the register of the condominium	Yes
Number of visitor parking spaces	Number of parking spaces allocated to visitors and registered in the register of the condominium	Yes
Number of garage spaces	Number of garage spaces registered in the register of the condominium	Yes
Number of storage spaces	Number of storage spaces registered in the register of the condominium	Yes
Center column		
Name of banking institution	Name of the bank	Yes

Address	Full bank address	Yes
Institution number	Enter the institution number	Suggested
Transit number	Enter the institution's transit number	Suggested
Current account number	Enter the institution's account number	Suggested
Provident fund account number	Enter the account number of the provident fund institution if different	Suggested
File upload	Uploaded a scanned bank document	Suggested
Banking Institution URL	Enter the bank's Internet link	Suggested
Customer portal URL	Enter the Internet link of the bank's customer area	Suggested
Right column		
Expected annual inflation	Estimated annual rate for the purpose of calculating the budget	Suggested
Previous budget amount	Previous year's budget amount	Yes
Amount in cash	Current account funds available immediately	Yes
Amount in hand of the provident fund	Funds in the current account available quickly	Yes
Provident fund transfer rate	By default according to the 5% law. This is the transfer rate to the provident fund.	Yes
Investment income	Income generated by investments	Yes
Destination of investment income	How investment income will be used	Yes
Amount in cash allocated to the auto insurance fund	Current account funds available immediately to cover damage insurance deductible	Yes
Loan balance	Loan balance to be paid	Yes
Line of credit balance	Margin Balance Payable	Yes

Enter the number of units in the condominium building. Enter the number of floors in the building. Enter the number of elevators if applicable.	Number of units How many floors Number of elevators

Number of outdoor parking spaces Number of visitor parking spaces Number of garage spaces Number of storage spaces	Enter the number of outdoor parking lots. Enter the number of outdoor parking spaces assigned to visitors. Enter the number of interior garage spaces. Enter the number of interior and/or exterior storage spaces.
Enter the name and complete address of the banking institution used by the board of directors.	Name of banking institution Address Addresse Ville Province - Sélectio... Code Postal Pays
Institution number Transit number Current account number Provident fund account number	These numbers are usually listed on the bottom of a check and can be useful to have on hand for recording automated payments. Contingency fund account number.
Enter an annual inflation rate. Enter the amount of the previous budget. Enter the cash amount in the bank account.	Expected annual inflation % Previous budget amount #,###,###.## $ Amount in cash #,###,###.## $

Amount in hand of the provident fund #,###,###.## $ Provident fund transfer rate % Investment income #,###,###.## $	Enter the amount in hand of the contingency fund. Enter the percentage rate of the transfer from the budget to the contingency fund. Enter the amount of investment income, if applicable.
Destination of investment income - Sélectionner - Amount in cash allocated to the auto insurance fund #,###,###.## $	Enter the destination of the investment income. Enter the amount in the self-insurance fund that corresponds to the amount of the insurance deductible.
Enter the loan balance contracted by the syndicate of condominium. Enter the balance of the line of credit contracted by the syndicate of condominium.	Loan balance 0 $ Line of credit balance 0 $

Section; Common element

A common element is the space of which all the co-owners have the enjoyment of use of the space (corridor, main and/or secondary entrance, sidewalks, etc.).

A exclusive common element is for restricted use (Call at **CondoLogy** **ACUR**). It's for the exclusive use of a co-owner, these **ACUR** units are assigned and registered in the register of the Condominium.

But beware, if the exclusive common element **ACUR** are cadastralized, they will be taken into account in the share of the co-owners and by the same token, determines the calculation of the division of common charges. (Fair but not quite fair)

If; the common areas are not cadastralized, they will not be taken into account in the share of the co-owners and will have to be part of a separate contribution in order to pay the common charges which are attached. (Equitable and fairer)

Some condominiums have included in the deed of condominium a share separate from that of the private units. When creating the budget in **CondoLogy**, it will be possible to use this calculation method.

The co-owner who has the enjoyment of exclusive use **ACUR** must, in principle of equity, pay a contribution for his use determined according to the budget of the board of directors.

Example: A co-owner has the exclusive use **ACUR** of a storage space, outdoor and/or indoor parking, he or she must pay a contribution which covers at least the cost of maintenance of the common area for restricted use **ACUR**.

Some boards of directors do not contribute co-owners for **ACURs** such as parking lots, garages or storage. The common charges are divided according to the shares of the co-owners. This procedure lacks fairness and transparency.

Other councils will rather opt for a fixed contribution such as for example; $20 monthly for outdoor parking, $35 monthly for indoor parking space and/or $15 monthly for storage space. This procedure is fairer and more transparent, but not 100% so.

CondoLogy moves forward with a 100% fair and transparent methodology;

If; the administrators during the production of the budget, identify the expenses of the field **Expense subject to common areas** to the correct membership status. The calculation will be fair and equitable beyond any calculation methods.

Note: Determining the maintenance cost of common areas for restricted use before the registration of the co-ownership will be difficult and before establishing the budget it would be a perilous exercise. This is why it is suggested to complete the fields whose data is known and available such as the number of square feet of the different common areas and ACUR or we can simply come back to this section once the Building Items that make up the budget are completed.

There are a multitude of compact devices that calculate the square feet of surface. This exercise, if it has never been done, will be beneficial for the future.

ACUR = Common Area for Restricted Use, CA = Common **A**rea, **CF = C**ontingency **F**und**, SIF S**elf**-I**nsurance **F**und**.**

Field name	Description	Mandatory
Total square feet common areas	This field automatically calculates the total square footage associated with common areas	Automatic
Square feet of interior common areas	total square footage of hallways, entrances and exits, stairwells	Suggested
Interior common air maintenance cost	Indicate the cost of electricity, gas and maintenance of interior common areas	Automatic
Square feet of garage common areas	total square feet of indoor parking spaces and/or garage(s)	Suggested
Garage common air maintenance cost	Indicate the cost of electricity, gas and maintenance of the common areas of the indoor parking lot and/or the garage(s)	Automatic
Calculate	Checkbox for end of calculation after all fields have been	Suggested

	completed	
Total maintenance cost subject to common areas	This field automatically calculates the total cost of maintenance associated with common areas	Automatic
Square feet of outdoor common areas	This is to assess the number of total square feet of outdoor spaces, entrances and exits from the land	Suggested
Cost of maintenance of outdoor common areas	Indicate the cost of electricity and maintenance of outdoor common areas	Automatic

Note: Often you can find the storage spaces included in the common areas of the garage.

The common storage area	Select whether or not included in the garage common area	Yes
Square feet of storage	This is to assess the total square footage of storage space	Yes
Storage maintenance cost	Indicate the cost of electricity, gas and maintenance of common storage areas	Automatic
Cost per square foot of storage	Automatic calculation of cost per square foot	Automatic

Let's start with this if you have the data:

Total square feet common areas	Total maintenance cost subject to common areas #,###,###.## $	Common area maintenance cost #,###,###.## $
These three fields are automatically calculated from the total number of square feet and the cost of their maintenance. **<u>Do not complete anything in these fields.</u>**		

Indicate the number of square feet of interior common areas (entrance, hallway, common room, etc.).	Square feet of interior common areas
Square feet of garage common areas	Indicate the number of square feet that constitute the common areas of the interior garages.
Indicate the number of square feet of outdoor common areas (lawns, sidewalks, parking, etc.).	Square feet of outdoor common areas
The common storage area - Sélectionner - Square feet of storage	Indicate if the common area of storage is located in separate common area or interior of the garage spaces. Indicate the number of square feet of storage space.
Calculate	**Calculation key only when the budget is completed.**

It is understood that as a principle of fairness, the maintenance costs of an **ACUR** restricted-use common area must be assumed by the exclusive user of this common area. The **CondoLogy application** is designed to calculate common areas for restricted use.

It is planned in the procedure to return to complete the calculation after completing the budget.

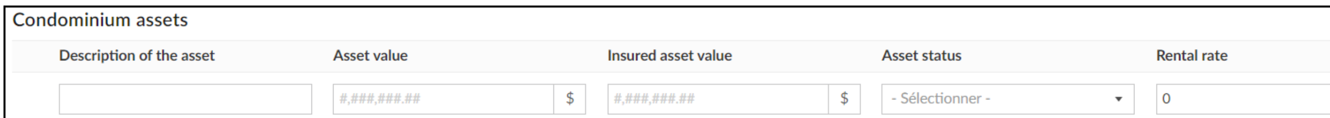
Let's continue!

Section; Assets of the Condominium

This is the section that allows you to describe the assets of the condominium. A condominium may hold assets that belong to the condominium. Some assets can produce income and others simply increase or decrease in value depending on the asset.

Field name	Description	Mandatory
Description of the asset	Description of the asset belonging to the co-ownership	Yes
Asset value	Indicate the value and not the price of the asset	Yes
Insured asset value	Indicate the insured value of the asset	No
Asset status	Indicate the status of the condominium asset	Suggested
Rental rate	Indicate the rate if the asset is rented	Yes

+ Add New This button is used to add a line to describe an asset.



Enter the description of the asset and its value. Enter the insured value and the status of the asset. If the asset is rented, enter the rental rate.

Section; Previous year administration archive

This section is used to archive digitized files from previous years administered. Recommended backup files are Word, Excel or PDF.

Field name	Description	Mandatory
Administration year 4	Newest file after current year	No
Administration year 3	File older than 4	No
Administration year 2	File older than 3	No
Administration year 1	File older than 2	No

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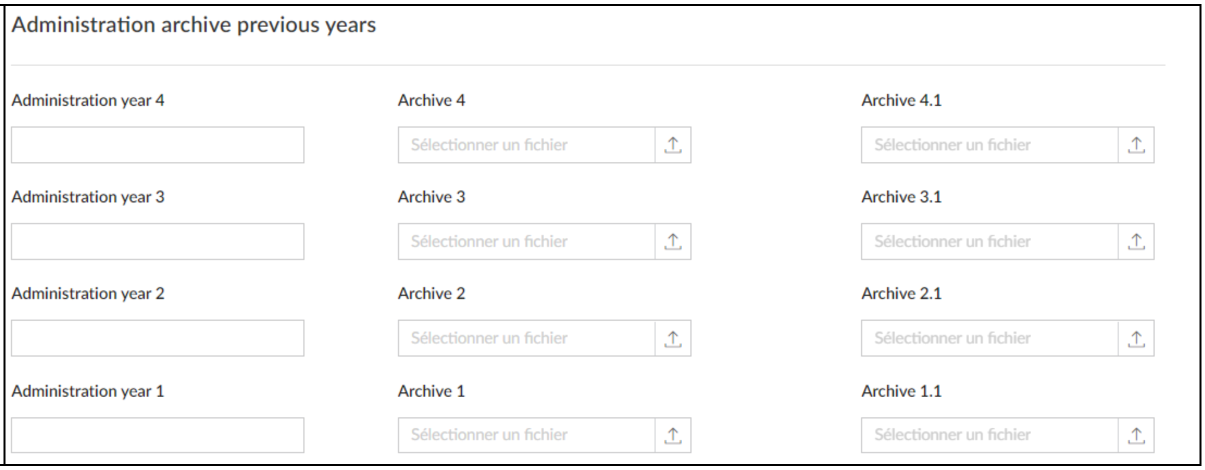
Starting at the bottom, enter the year of administration and upload the digitized administration document to the archive.

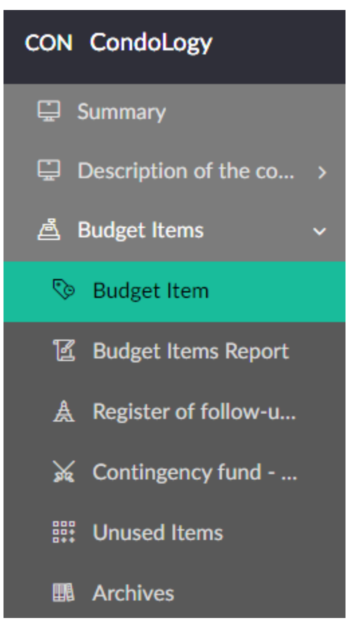


Once the information has been added and completed, click on Soumettre Réinitialiser . An auto-email is sent as soon as the description of the condominium is saved and created.

Great!

Form; Budget items

In force.



To function properly, a condominium must obtain products and services (electricity, natural gas, housekeeping, repairs, etc.) called at **CondoLogy Item.** Some items have a maintenance cost without the need for eventual replacement due to wear or exceeding the useful life of the item.

Other Budget Items have an annual maintenance cost before they need to be replaced or major upgraded.

In addition, an annual contribution to the contingency fund of at least 5% must be made in order to be able to prevent future expenses for the replacement of certain or a major upgrade of these Items.

All the items form a breakdown which represents the expenses associated with the **budget.** At this point, you can create your building items one by one or use a default list that can be imported. To see below... and at this stage check your emails!

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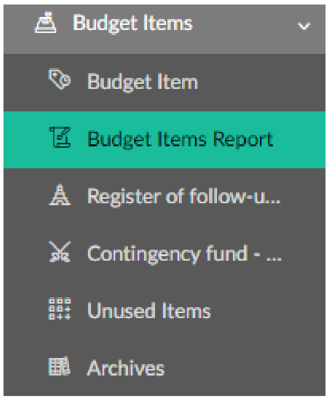
Report; Budget items
In force.



If you wish, a list of default budget items is in the **CondoLogy application or can be uploaded** to simplify the implementation of the budget.

Obtain the default list; Click here

ATTENTION; If your board wishes to start with an empty application of budget items, click on REPORT BUDGET ITEMS.

Do not import the budget item importer or select all items from the REPORT BUDGET ITEMS tab 

and then delete 

.

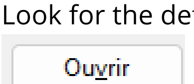
The effect will be immediate to remove all items from the budget permanently. The report will be blank.
(Not recommended)

How to import the default list;

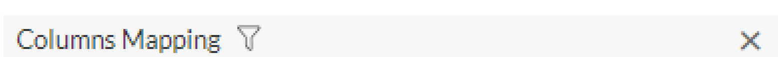
Go to the REPORT BUDGET ITEMS tab.

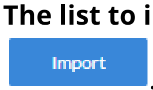
Aucun enregistrement ne correspond à votre critère spécifié!

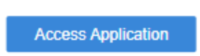
then click on **Import,** then on **Local storage**.

Look for the default items file name; **Budget Items Report 2023v0707Eng** then click on 

.

The list to import appears. 

Click on the **X** then on 

. To access the imported list click on 

.

This import method is for all imports.

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When preparing the annual budget, it is recommended to register future submissions by checking this box ☐ Go to soumission for this item for **Budget Items** that will need to be maintained and/or replaced by professionals.

Budget Item fields

Field name	Description	Mandatory
Administration started on	Date of the beginning of the administrative year	Yes
Administration finished on	Administrative year end date	Yes
Current fiscal year	Enter the year being administered	Yes
Item code	Can be created, copied and/or transferred from a professional report	Suggested
Item Category	Enter the category of the budget item	Yes
Name of supplier	Name of the company providing the product or service	Yes
Item Description	Enter the description of the budget item	Yes
Item Condition	Enter the current condition of the item	Suggested
Warranty expiration date	If a warranty is in effect, indicate the expiry date	Suggested
Item type	Choose item type	Yes
Income or collection	If the amount is income or a receipt, enter it	Yes
Expense assumed by	Choose how the expense is assumed	Yes
Expense subject to common areas	Determine if the budgeted item is an expense directly related to common areas	Yes
Item to be replaced	Determine if the budgeted item is an item that will eventually need to be replaced	Yes
Detailed description of the item	Check box to show or hide fields	No
Contact supplier	Enter contact name	Suggested
Telephone supplier	Enter the phone number of the budget item	Yes
Contact extension	Enter the extension number to reach the contact	Suggested
Mobile supplier	Enter mobile phone number	Suggested
Supplier email	Enter the email of the budget item	Yes
Customer portal URL	URL link directly to the customer area	Suggested
Web site URL	Web site of supplier for info or order online	Suggested
Supplier address	Enter the mailing address of the supplier	Suggested
Supplier payment term	If there is a payment agreement, indicate its term	Suggested
Confirmed in Budget	Check box to confirm in budget	Yes
Amount confirmed in the budget	Amount of budget will appear automatically	Automatic
Next budget increase	Enter a % of increase in next budget	Suggested
Annual cost	Annual amount associated with the product or services	Yes
Tracked or payment status	Indicate the status of the item in relation to a follow-up or a payment	Yes
Date of payment	Indicates the date for a follow-up or to make a scheduled payment	Yes
Payment term	Determines payment terms for products and/or services	Yes

Payment method	Select a payment method for this Item	Yes
Next payment amount	Indicates the amount of the next payment according to the terms	Yes
Total paid	Indicates the total amount paid to date	Automatic
Balance payable	Indicates the amount remaining to be paid according to the terms	Automatic
Previous budget cost	Indicates the amount of the previous budget	Yes
Total paid from previous year	Total paid for goods and services from the previous year	Automatic
Variation paid	Indicates the variation of the amount budgeted and that paid	Automatic
Budget variation	Automatic calculation of the variation between the budget and that of the previous year	Automatic
Go to submission for this item	Once this box is checked, a submission form will be created.	Suggested

Section; Budget items

Several functions are associated with the budget item sheet. The better defined the budget items, the easier it is to administer them.

1- Assign an expense to the budget
2- Establish a maintenance cost and a replacement value of the item
3- Carried out the administration attached to the budget items at the service and/or supply level

As a board of directors, you must define under which mode you wish to administer the items that makeup the budget of your condominium.

Macro Set Mode = An analysis of all items of the same category and/or format (extinguishers, heaters, etc.)

Micro Detailed Mode = A detailed analysis of each item that makes up the same category and/or format (one record for each fire extinguisher, one record for each heating appliance, etc.) This mode of administration is an added value and increases the value of the private units because it demonstrates a clear and transparent advanced administration with a lot of possibility for further maintenance of the items which saves the condominium in the long term.

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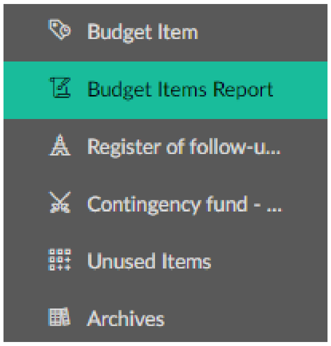
Use Default Report Budget Items.



By default, a list of budget items is listed in **Set Mode** in **Budget Items Report**.

You can use them, duplicate them (For a Detailed Mode) , modify them and/or delete them and/or change the mode of administration in order to create your own budget items. It is also possible to add items to your budget that are not part of the default list.

From Macro Mode to Micro Mode

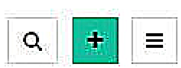
Select an item in the default list which could be a pool of items of the same type and/or format. Click on the three little green dots **...** then on Duplicate then on confirm **YES** . As items are ranked by default, the duplicated item will be below the one that was duplicated.

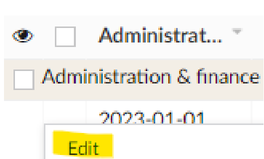
Click on the three little green dots **...** duplicate item then on Edit . Complete the form in terms of detailed item also in terms of values.

If you use an administration in **Micro Mode,** it is strongly recommended to enter an **Item Code.**

This implies that the physical item must be identified with the same code.

Trick; It may be better to duplicate a sheet that has been completed if the items are of the same category and/or format.

Addition: At the top right click on the +  , you will be able to obtain a blank form in order to complete your item to add to the budget **or...**

Click on the 3 green dots 

then on **Edit** in order to enter the file of the first item or, by clicking on the line of a report, this opens a summary window before clicking on **Edit.**

Some fields are completed for information only, it is for you to complete the fields in order to display your own reality of the condominium. When saved, the budget item report is grouped in ascending order by default.

The list of default budget Items whose **Category field of the item** is free of category. Entering a category

Item Category

- Sélectionner - of an item ensures that this item is grouped together in the same category when saving. It becomes exciting to see the budget items grouped by category that will be part of your budget.

To delete an Item

Click on the checkbox to the left of the line of the item 2023-01-01 then click on Delete at the top of the page and confirm by clicking on **Yes.**

Unused items

To move an item in the **Unused Items report**, do a search from the **Description column of the item,** if this item does not correspond to your reality of co-ownership, open the file by clicking on the three small green dots

Administrat...

Administration & finance

2023-01-01

Edit then on **Edit.** Modify it **Item type** to **Item unused.**

When the change is complete, click Mettre à jour Annuler . The item ends up in the Unused Items report.

Open a Budget Item

Open the sheet of an item by clicking on the three small green dots **...** then on **Edit** or, by clicking on the line of a report, this opens a summary window before clicking on **Edit.**

Choose an item and let's go!

Left column	
Enter the start date of the administrative year (if not already entered) and the end date. Then enter the current tax administration year.	Administration started on yyyy-MM-dd Administration finished on yyyy-MM-dd Current fiscal year
Item code	If a professional assessment of your building has been carried out, there is a good chance that the items have been identified by a Code, register it, or you can create your own identification codes if necessary, especially if your Mode of administration is detailed.
Choose the category of the item.	

Choose a supplier associated with the item description to supply the supply. If a supplier is not in the list, you can create a supplier record **+ Ajouter Nouveau** which will be archived under the Contractors register tab. Once completed, click **Soumettre** **Réinitialiser**. If you don't need a supplier for the item right now, you can always come back to it to add one later.	Item Category - Sélectionner - Name of supplier - Sélectionner -
Modify or briefly complete the item description (if not already entered). Choose this current condition.	Item Description Item Condition - Sélectionner -
Warranty expiration date yyyy-MM-dd	If there is a warranty expiration date, then enter it.
Most budget items are associated with an expense. Determine how the expense is covered. Determine if the expense is subject to a common area. Will the item be replaced one day. If yes, choose **Yes** and go to the **Contingency fund - Maintenance logbook section** then to page 29 of the procedure before returning and completing the center column and the right column before completing the right column. If not, continue.	Item Type - Sélectionner - Income or collection #,###,###.## $ Expense assumed by - Sélectionner - Expense subject to common areas - Sélectionner - Item to be replaced - Sélectionner -
☐ Detailed description of the item	Once this box is checked, a submission form will be created. It is a question of completing it before sending it to the tenderer s.
Center column	
We recommend that you complete from the **Supplier Name field** in the left column (in order to provide the Contractors Registry) or, enter the name of the contact you have with the supplier if these spaces are empty.	

Enter the contact's telephone number and extension, if applicable.	Contact supplier Telephone supplier +1 506-234-5678 Contact extension
Mobile supplier +1 506-234-5678 Supplier email	Enter the mobile phone of the supplier's contact. Enter the supplier's contact email.
For more speed, copy / paste the URL address of the supplier's customer space in order to have access to the online customer portal. Enter the URL of the supplier's website.	Customer portal URL https:// Web site URL https://
Supplier address Address City Province Postal Code - Sélectio... Country	If necessary, enter the full mailing address of the supplier.
If an account is opened with the supplier, enter the payment term for the account if applicable.	Supplier payment term
Confirmed in Budget Make sure items are verified and completed before checking the box. Amount confirmed in the budget #,###,###.## $ Next budget increase %	Confirming the budget is not for now. The procedure is on page 29. All budget items must be completed before. Automatic calculation. Indicate in % the next budget increase.
Right column	

The annual cost of the budget item can be calculated manually or automatically. - Manually, enter the amount. - Automatically, the PROVISION FUND - MAINTENANCE LOGBOOK section must be completed (page 29).	Annual cost #,###,###.## $
Tracked or payment status - Sélectionner - Payment date yyyy-MM-dd	Indicate tracking or payment status. Indicate the date of the next payment. (The Follow-ups and Payments Log will display in order the follow-ups or payments to be made).
Choose the term of the payment agreement with the supplier. Choose payment method.	Payment term - Sélectionner - Payment method - Sélectionner -
Next payment amount #,###,###.## $	If known, indicate the amount of the payment or according to the **Payment term** the calculation can be automatic.
These fields are calculated automatically. **Total Paid** is the automatically calculated amount of the total payments made and **Balance Payable** is the remaining amount due within the fiscal year dates.	Total paid .00 $ Balance payable #,###,###.## $
Previous budget cost #,###,###.## $ Total paid from previous year #,###,###.## $	Enter the amount that was provided for in the previous budget for this item. Enter the amount actually paid in the previous budget for this item.
Variations are calculated automatically.	Variation paid Budget variation %
☐ Go to soumission for this item	Once this box is checked, a submission form will be created. It is simply a question of completing it before sending it to the bidders.

Section; Breakdown of redistribution:

If; the item of the budget must be paid by several syndicates of condominium, this section is designated to redistribute the common charge between the syndicates.

If; the budget item is a redistributed part of an expense, a budget item is provided for this purpose.

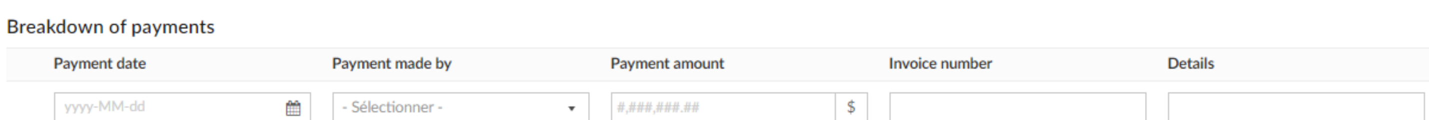
Nom du champs	Description	Mandatory
Syndicate name	Select main syndicate	Yes
Syndicate name	Select secondary syndicate	Yes
Bill percentage	Indicate the percentage of responsibility for the expense	Yes
Amount assumed	Automatic redistribution calculation	Automatic
Total percentages	Automatic percentage total calculation	Automatic

Section; Breakdown of payments:

Products and services will need to be paid for under different terms and payment methods. To enter and archive a completed transaction.

Field name	Description	Mandatory
Date of payment	Enter the date of payment made	Suggested
Payment amount	Enter payment amount	Suggested
Payment made by	Choose how the payment was made	Suggested
Bill number	If applicable, enter the invoice number	No
Details	To be used for additional info	No

Go to the section:



Then click on **+ Add New** then complete the payment fields. Do not forget to make the payment is payable!

If; Your fiscal year has already started, you can enter the payments made as soon as the budget is set up or come back to it once your items have been completed.

It should be understood that once all the items of the budget have been completed, you must make a careful check of the items because it will be necessary to "freeze" the budget explained on page 29 in order to prepare the invoicing of the common charges to be sent to the co-owners or to balance your current budget with that of **CondoLogy** before continuing the daily administration.

At this point, your file may be completed if **Item to be replaced** is **No.** When saving, click on Mettre à jour Annuler, what just happened is very interesting. The budget item that was part of the default list created when saving, a grouping by category. Continue with building items!

IF; **Item to be replaced** is **Yes,** complete...

Section; MSDS Data sheet:

Material Safety Data Sheets provide manufacturer information on appliances and/or certain items that make up the building. This section can be completed after the budget calculation. However, do not forget to enter a **Date-Time follow-up** and a **Note on the follow-up.**

Field name	Description	Mandatory
Item brand	Enter the manufacturer's mark if available	Yes
Item model	Enter model number if available	Yes
Item serial number	Enter the serial number of the item if available	Yes
Place of manufacture	Enter the place of manufacture if available	Yes
Item feed	Enter the food of the item if available	Yes
Item Power	Enter the power of the item if available	Yes
Item approved by	Indicate by whom the item is approved if available	Yes
Padlocking technique	Enter the lockout technique produced by a professional if available	Yes
Item URL	Enter the URL that describes the item if available	Yes
Item Documentation	Uploaded a scanned document of the item if available	Yes
Item picture	Uploaded an image of the item if available	Yes
Object Detection	AI on item if available	Yes
OCR	AI on item if available	Yes

MSDS Data sheet

Item brand

Item model

Item serial number

Place of manufacture

Item feed

Item class

Item Power

Item approved by

Padlocking technique

B I U DejaVuSans 10

Consult a professional to determine MSDS Data sheet technique if necessary.

Item URL

https://

Item Documentation

Sélectionner un fichier

Item picture

Sélectionner une image

Objet détection

OCR

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Padlocking technique

As an administrator also comes the responsibility of administering budget items that may be considered dangerous. Here is a link to familiarize yourself with the lockout techniques that are tailor-made for each of the items deemed dangerous. Professionals perform lockout techniques.

CNESST

Example of lockout sheet

Fiche de cadenassage

ATELIER	N° FICHE	APPROUVÉ PAR	DATE
Cardage	001	Jos Coton	2007-02-05
ÉQUIPEMENT	TRAVAIL À EFFECTUER		
Cardes	Nettoyer le cylindre		
MATÉRIEL REQUIS	3 moraillons, 3 étiquettes, 1 dispositif de cadenassage pour valve papillon, 3 cadenas personnels		

MISE À L' ARRÊT E T CADENASSAGE

Étape	Description	Code de la source d'énergie	N° Image
1	Aviser le personnel concerné		
2	Effectuer l'arrêt normal de la carde (bouton ARRÊT ou STOP)	B-1	1
3	Placer le sectionneur de la carde en position fermée ; apposer moraillon et étiquette, cadenasser	S-1	1
4	Effectuer l'arrêt de la chute (bouton ARRÊT ou STOP)	B-3	2
5	Placer le sectionneur de la chute en position fermée ; apposer moraillon et étiquette, cadenasser	S-2	2
6	Fermer la valve d'air comprimé ; apposer dispositif de cadenassage, moraillon et étiquette, cadenasser	VA-1	3
7	Attendre l'arrêt complet du cylindre et faire un essai de démarrage (bouton DÉPART ou START)	B-2, B-4	Initiales du témoin SV

AVERTISSEMENTS
- Les travaux sur les installations de 50 volts et plus doivent être effectués par un électricien et il faut d'abord s'assurer que l'énergie est à 0 avec un testeur ;
- Toute personne ayant à intervenir sur la machine en cours de travaux doit d'abord en informer ses collègues et apposer son cadenas personnel.

ESSAI APRÈS LES TRAVAUX

ATTENTION
- Replacer tous les protecteurs sur la machine ;
- S'il reste un cadenas, référer à la procédure de décadenassage.

Étape	Description	Code de la source d'énergie	N° Image
1	Aviser les personnes concernées et enlever les outils autour de la carde		
2	Décadenasser et enlever les étiquettes et moraillons sur le sectionneur de la carde, sur celui de la chute et sur la valve d'air comprimé ; replacer les protecteurs	S-1, S-2, VA-1	1, 2, 3
3	Démarrer la machine ou la section de la machine nécessaire à l'essai en procédant avec précaution		
4	Refaire les étapes 1 à 7 de la procédure de mise à l'arrêt avant de reprendre les travaux		Initiales du témoin SV

REDÉMARRAGE

ATTENTION Replacer tous les protecteurs sur la machine avant le redémarrage.
S'il reste un cadenas, référer à la procédure de décadenassage.

Étape	Description	Code de la source d'énergie	N° Image
N° Image			
1	Remettre la machine en marche en effectuant les étapes 1 à 3 de la procédure d'ESSAI APRÈS LES TRAVAUX	S-1, S-2, VA-1	1, 2, 3

ÉTAT DES TRAVAUX	☐ Complétés	☐ Non complétés
Détails :		
Effectués par : Kev Lord Signature : Kev Lord	Date : 2007-02-10	
Modifications à effectuer à la fiche : ☐ Non ☐ Oui ☐ Aviser le responsable		

SOURCE : PRÉVENTEX

Section; Contingency fund - Maintenance logbook

This section includes a calculation module to help plan the contributions required to build up the contingency fund and the maintenance booklet.

This is the most sensitive part of the administration. A properly funded contingency fund avoids a multitude of problems when an important building item needs to be replaced or undergoes major repair or restoration.

Here is a very simple example; The replacement of the roof is necessary for an amount of $45,000.00. Your contingency fund contains $25,000.00, there is a shortfall of $15,000 that you will need to finance.

Issues; How to finance this $15,000? Do we leave an empty contingency fund after the repair? How much funds are we allowed to use from the contingency fund?...etc.

Potential problem;

If; One or more co-owners cannot pay a special contribution to makeup for the lack of funds even if they are obliged to. Who contributes to the lack of funds? What procedure is necessary to collect the co-owner(s) in default of payment? What will be the fees involved?

The building contains a multitude of items that compose it. These items have a useful life and will need to be maintained periodically and/or replaced at or near the end of their useful life.

The fairer the breakdown of the items associated with the building, the fairer the maintenance budget will be and this often avoids possible special assessments. Professional help to make a report, an inspection and/or an evaluation in order to describe the breakdown of the items that make up your condominium building is strongly suggested, not to say "mandatory".

The transfer to the FDP provident fund is assessed in 2 ways;

1- With the help of a building expert and/or from your **CondoLogy application**. The Transfer Rate to the FDP cannot be less than 5% according to the Civil Code of Quebec.

2- A percentage decided by the board of directors according to the report of the state of the building and the works to come. In **CondoLogy**, it will be possible to check if the FDP contributions are sufficient. However, the **FDP Transfer Rate** may not be less than 5% depending on the **Civil Code of Quebec** **or** the common law in rest of Canada.

Formula;
The PCF **P**lan **C**ontingency **F**und is = at the cost of replacing or upgrading an item.
The maintenance book is = the cost of the annual maintenance of the item.

Field name	Description	Mandatory
Year of installation	Enter the year the item was installed	Yes
Number of useful years	Enter the number of useful years of use declared by the manufacturer	Yes
Number of years used	Demonstrates the number of years of use of the item	Automatic
Number of useful years remaining	Shows the number of years of use remaining	Automatic
Replacement cost	Replacement cost in today's dollars of the item	Yes
Follow up Date-Time	Indicate the date-time of the tracking of the Item	Yes

Note on follow-up	If necessary, enter a note on the follow-up to be done on the Item	Suggested
Total replacement cost	Automatic calculation of all replacement costs	Automatic
Total 0 to 5 years	Automatic calculation of replacement costs for this period	Automatic
Total 6 to 10 years	Automatic calculation of replacement costs for this period	Automatic
Total 11 to 15 years old	Automatic calculation of replacement costs for this period	Automatic
Total 16 to 20 years old	Automatic calculation of replacement costs for this period	Automatic
Percentage of average maintenance cost	This percentage determines the amount of the annual maintenance cost. It can be adjusted as needed.	Yes
Annual maintenance cost	Calculates annual maintenance cost based on percentage	Automatic
Total annual cost	This is the total annual maintenance costs	Automatic
FDP transfer rate	This is the percentage entered in the Description tab of the co-ownership according to the field **Transfer rate to the provident fund**	Automatic
Transfer to FDP	Demonstrates the amount that will be transferred to the provident fund	Automatic
Total cash at FDP	Total on hand after transfer from **Transfer to FDP**	Automatic

Definition: A contingency fund is by definition an amount of money in savings accessible quickly which will be intended to absorb all expenses related to the major repair or the replacement of an item of the building provided for or not in the budget.

The maintenance book is by definition an amount budgeted **for the maintenance** of certain items of the building in order to carry out a follow-up to ensure proper operation and maintenance of the common good.

This section defines the replacement cost and the **annual maintenance cost** of the item added to this budget.

Let's go!

Left column	
Indicated the year of installation of the item. Indicated the number of useful years of the item according to the manufacturer.	Year of installation Number of useful years
	An automatic calculation will indicate the number of years the item has been used.

Number of years used Number of useful years remaining	An automatic calculation will indicate the remaining useful year of the item according to the manufacturer.
If necessary, enter a Follow up Date-Time for tracking the Item with or without a supplier for inspection or other purposes. If necessary, enter a note on the follow-up to be done on the Item.	Follow up Date-Time yyyy-MM-dd HH:mm:ss Note on follow-up
Center column	
Replacement cost #,###,###.## $ Total replacement cost #,###,###.## $	Enter the replacement cost of the item in today's dollars. An automatic calculation will indicate the **Total replacement cost** of all items.

For each total, automatic calculation of the replacement cost of the items in a future period indicated in the **Number of useful years remaining field.** It will always be possible to make a correction to the **Replacement Cost** of an Item. However, the sum calculated in the fields will be exact only when saving by clicking on Mettre à jour Annuler . The **Planned PCF** is an automatics calculation of an average that PCF should be.	Total 0 to 5 years #,###,###.## $ Planned PCF 0 to 5 years #,###,###.## $ Total 6 to 10 years #,###,###.## $ Planned PCF 6 to 10 years #,###,###.## $ Total 11 to 15 years #,###,###.## $ Planned PCF 11 to 15 years #,###,###.## $ Total 16 to 20 years #,###,###.## $ Planned PCF 16 to 20 years #,###,###.## $
Right column	
Percentage of average maintenance cost .00 % Annual maintenance cost .00 $	Enter a **Percentage of the average maintenance cost** to determine the annual maintenance cost by automatic calculation. This time can be adjusted until the **Annual Maintenance Cost** is representative of reality or enter your expected amount.
Automatic calculation of the Total annual maintenance **cost of items.** This amount indicates the amount of budget expenditure.	Total annual cost .00 $
PCF transfer rate 5 % Transfert to PCF .00 $	The transfer rate to the FDP comes automatically from the fields **Transfer rate to the provident fund** of the description of the co-ownership but is by default entered at 5%. Automatic calculation of the amount to be transferred to the FDP provident fund.
Automatic calculation of the **Total in cash at the PCF** .	Total on hand in PCF #,###,###.## $

Continue with the instructions on page 22 then **Center Column.** You will see in the right column in the **Annual cost field** that the maintenance amount of the item has been entered automatically.

Special Item: Petty Cash

Item Description

One of the budget items created by default is named Petty cash .

This item is very important since it is always certain that an unforeseen expense may arise during the year of operation and/or simply have forgotten to add an item to the budget. At the next change of year of operation, it will be important to consult the list of expenses assumed by the **Petty Cash** in order to create one or more items for the next budget, if necessary. Determine an amount and enter it in the **Annual cost** field.

This item can also be used to balance the **CondoLogy budget** with the existing one or one under administration if your subscription to **CondoLogy** was made after the start of your fiscal year. Adjust the amount in the Annual Cost field as needed.

Alignment of the transfer to the PCF

Trick; The big **U method.** Complete the left column, continue with the **Contingency Fund - Maintenance Book section** at the bottom of the form, then complete the transfer of funds from the right column at the top!

Item Description

One of the budget items created by default is named Contingency fund to be **completed penultimate (The last field will be the key to confirm the budget).**

This default item is important since it is used to transfer money to the PCF Contingency fund. This Item is also used to calculate the **Total on hand at the PCF** for the purpose of aligning the contingency fund with the totals of the replacement cost of the items to be eventually replaced in 5-year increments.

CondoLogy is programmed to calculate in 5-year increments the amount of Items that reach the end of their useful life and may require a replacement or a major upgrade. It is therefore possible to align the transfer rate to the FDP to ensure that potential future expenses are met.

Here's how: Open the item form by clicking on the three small green dots **...** then on **Edit.** Move your mouse over the field **Category of the item** then select **Administration & finance.**

Item Type Transfert Income or collection #,###,###.## $ Expense assumed by The budget	Make sure field is set to **Transfer.** Make sure the field is at **Budget**

Then go to the **Contingency fund - Service book section.** Your automated calculations have been done!

Rules

Replacement cost #,###,###.## $ Total replacement cost #,###,###.## $ Total 0 to 5 years #,###,###.## $ Planned PCF 0 to 5 years #,###,###.## $ Total 6 to 10 years #,###,###.## $ Planned PCF 6 to 10 years #,###,###.## $ Total 11 to 15 years #,###,###.## $ Planned PCF 11 to 15 years #,###,###.## $ Total 16 to 20 years #,###,###.## $ Planned PCF 16 to 20 years #,###,###.## $	Percentage of average maintenance cost .00 % Annual maintenance cost .00 $ Total annual cost .00 $ PCF transfer rate 10.000 % Transfert to PCF .00 $ Total on hand in PCF #,###,###.## $	**Total Replacement Cost** is **=** Addition of all **Replacement Cost** if **Item to be replaced** is = **Yes.** **Total 0 to 5 years** is **=** Addition of all **Replacement cost** if **Item to be replaced** is = **Yes** and **Number of useful years remaining** is between **0 to 5 years.** **Planned FDP 0 to 5 years** is = Addition of **Transfer to FDP** x per 2.5 years (ie the middle of 0 to 5 years) + **Total in hand at FDP.** This amount makes it possible to see approximately whether the PDF will be sufficient to meet future expenses between 0 and 5 years. This rule also applies to: 6 to 10 years old 11 to 15 years old 16 to 20 years old

Adjust the transfer to the PCF

You notice that in one or more 5-year tranches, the amount indicated in the **planned PCF** is definitely lower than the amount of the **Total** for one of the 5-year tranches.

What to do?

With **CondoLogy,** it is possible to adjust the transfer to the PCF provident fund in order to more correctly align the transfer to the reality of your co-ownership.

PCF transfer rate [ ] %	By default, 5% is the prescribed minimum. Modify this value upwards if the **expected PCF amount(s)** are insufficient. Decrease the value if you have changed it too much but never below 5%.

expected PCF amounts align with the Totals of the 5-year year tranches, then complete the following fields to ensure the follow-up of future transfers to be made.

In the Item section of the budget at the top right; Adjust your fields like these. Do not forget to indicate the date of the next transfer to be made. The dates and amounts will vary depending on the reality of your co-ownership.	Tracked or payment status Transfert Payment date 2023-07-20 Payment term Monthly Payment method Transfer between accounts Next payment amount 545.28 $

Memo: If; Your fiscal year has already started, you can enter the transfers made as soon as the form is set up **(Recommended)** or come back to it later **(Less recommended).**

Go to the section:

Breakdown of payments

Payment date	Payment made by	Payment amount	Invoice number	Details
yyyy-MM-dd	- Sélectionner -	#,###,###.## $		

then click on **+ Add New** then complete the transfer fields. When the form is completed, click on

Mettre à jour Annuler

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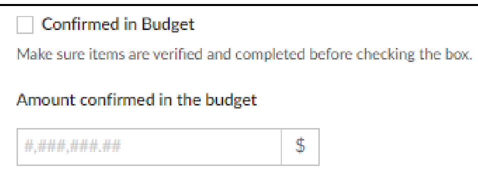
Confirm to budget

Confirm items in the budget one by one, here's how; you go to the **Budget Items form** and then to the **Budget Items Report tab** . To the left of the item row, click on the three little green dots **...** then on **Edit.**

Once the **Confirmed in budget box** is checked, the amount of the **Annual cost field** is displayed. This **Annual Cost** has been added manually or calculated from the **Contingency Fund - Service Book section.** This is your last chance to make sure that the amount corresponds to the needs of your co-ownership for the invoicing of common charges. **(Recommended)**	

The check box Confirmed in Budget should be the last field to be completed before establishing the contributions for the common expenses of the co-owners. Once checked, this indicates that you have checked all the fields and that the amounts correspond to the reality of your condominium's needs. This key will confirm the calculation of the amount that will be taken into account for the calculation of contributions to common charges (condo fees) of the private units of the co-owners.

Confirm to budget in mass, here's how; it is also possible to go to **Budget Items Report** and check the **Annual Cost column** for each item classified by category.

Then select one category at a time, for example Accessories - Device , then Edit . Enter the search × Confirmed in Budget then check the box Confirmed in Budget and Apply **(Less recommended).**

Or

Select all categories by clicking Administrat... , then Edit . Enter the search × Confirmed in Budget then check the box Confirmed in Budget and Appliquer **(Even less recommended).**

The last column **Budget Confirmed** indicates confirmation to the budget with a **Yes.**

Your budget is confirmed!

Annual dues will be sent to the co-owners using the **Condominium register form. But before...**

Finalization of the calculation of Common Areas

If you haven't already done so, go to **Description of the condominium Report**, open the file by clicking on the three small green dots **...** and on **Edit** then go down to the **Common areas section**.

Click Calculate .

You have just finalized the calculation of the cost per square foot of the common areas, which will have the effect of calculating the cost of the common areas for **ACUR** restricted use of the co-owners when you complete the contributions to the common charges from the Register of condominium.

Once the calculation has been made for monitoring the private unit's contributions, save the file by clicking on ;

.

A forgotten Item?

If, however, an oversight occurs, the expense must be added to the budget using as indicated on page 22 **Budget item** then, **Expense assumed by** the **Next budget** or use the **Petty cash item** to cover the expense.

Underestimate - Overestimate

If, however, an Item was undervalued or overvalued and the expense would not be exactly what is budgeted, it is not dramatic, it must be understood that a budget is indicative and may know at the end of the period. exercise a surplus or a deficit.

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To make a correction on the tab; Contingency fund - Maintenance book

It is always possible to make a correction to the Replacement Cost of an Item. However, the sum calculated in the fields will be exact only when saving by clicking on Mettre à jour Annuler .	Replacement cost #,###,###.## $ Total replacement cost #,###,###.## $ Total 0 to 5 years #,###,###.## $ Planned PCF 0 to 5 years #,###,###.## $ Total 6 to 10 years #,###,###.## $ Planned PCF 6 to 10 years #,###,###.## $ Total 11 to 15 years #,###,###.## $ Planned PCF 11 to 15 years #,###,###.## $ Total 16 to 20 years #,###,###.## $ Planned PCF 16 to 20 years #,###,###.## $

To remove one or more Items from the Report budget without deleting it or them.

Open an item's file by clicking on the three small green dots ... then on **Edit.** Head over to the field

Item Type

Expense × ▾ and change the value to **Unused Item** . To find them, click on the report;

. To use them again, change the category. Then once modified, save the file.

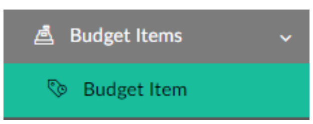
Special Budget Item: Contingency

An unforeseen expense arrives but cannot modify the established budget for which the co-owners have been invoiced for their common charges (condo fees). But contingencies must however be financed by:

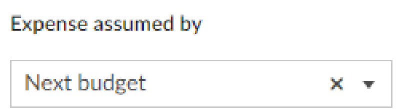
1- Through Petty Cash (Amount allocated for small expenses and/or small contingencies)
2- By the contingency fund
3- By a special contribution
4- Next budget (Amount that will be part of the follow-ups and/or expenses without modifying the budget)

Budget item (Next budget)

Petty Cash budget item to add an expense that was not planned in the budget, it is also possible to immediately create a budget item if this expense is important or may be redundant at the risk of forgetting it again.

Click on


or on

completed fields and enter


.

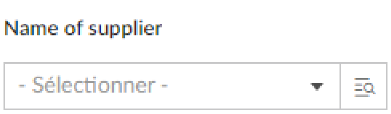
When saved, the item will be visible like all the others but will not be taken into account in the budget and will not modify the contributions of the co-owners. When the year of operation changes, all you have to do is modify the **Expense assumed by** field to be modified for THE BUDGET so that the expenditure is assumed by the future budget.

This budget will be necessary in order to determine the contributions to the common expenses of the co-owners according to the share registered for each of them in the deed of co-ownership.

Unforeseen expenses

In a new budget, unforeseen expenses must be converted into a budget item or deleted from the list of items if this expense is not recurring.

Trick; Kill two birds with one stone!

The field


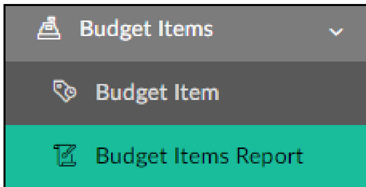
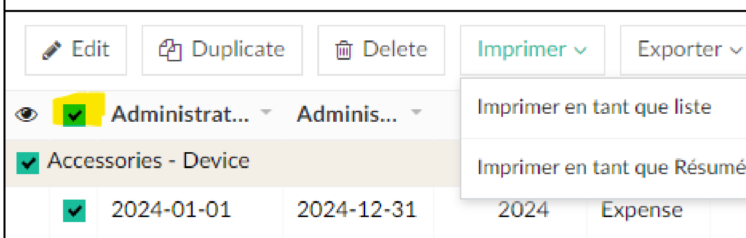
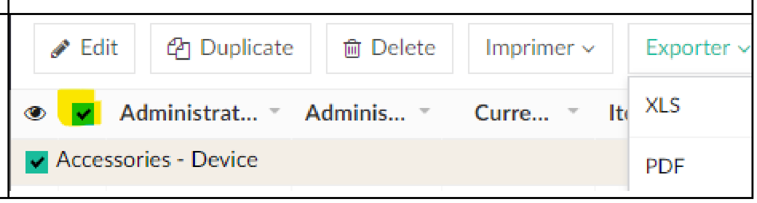
is a search field and an add field.

1- It is directly linked with the **Register of Entrepreneurs** . From this field, you can search for contractors and/or suppliers if your register is already complete,
2- From this field, you can create a contractor and/or supplier bank by clicking at the bottom of the **Add New field**.

If your register of suppliers and/or contractors is at hand, enter the information as you go. Do a Google search to find suppliers and their contact information.

Budget Items Report

This is the list of budget items that are grouped by **Item Category** in ascending order. This report can be edited, filed, printed and/or exported. It can be used as a budget item report at the annual meeting.

	Shows the difference of budget items with the previous year. This report exported in Excel can be used for a presentation. It can be modified as described above, filed, printed and exported.
Class; Each column has the same possibilities. Click on the bold description of the column.	Research Sort ascending Sort descending Group in ascending order Group in descending order Hide column
	**To print;** After selecting all budget items by clicking on the checkbox at the top of the left column in yellow. It is possible to print as List or Summary.
Export; After selecting all budget items by clicking on the checkbox at the top of the left column in yellow. It is possible to export to Excel or PDF file and even more!	

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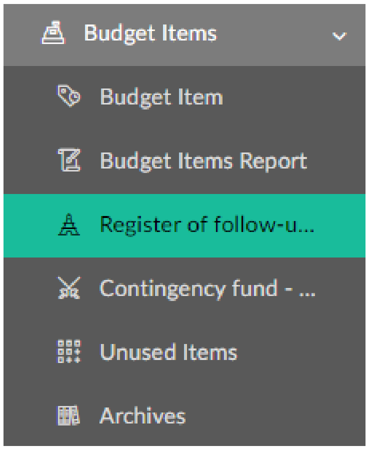
Payment follow-up and maintenance log follow-up

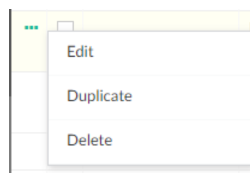


These reports make it possible to monitor the follow-ups and/or payments to be made on a daily basis.

These reports can be filed, printed and exported.

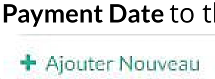
From the first columns, we see the Description of the item, the Condition of the item, the follow-up or payment Status as well as the Payment Date and/or Follow-up Date-Time. The Items are listed in ascending order. Which allows tracking of supplies and/or contractors and/or suppliers to the earliest date or day into the future.

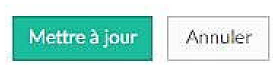
Payment or follow-up

If you have a payment to make on today's date, click on the three small green dots 

then on **Edit** to open the budget item page.

In principle, at this stage, the item sheet is completed and, if necessary, updated.

To make a payment. Adjust **Tracked or Payment Status** and **Payment Date** to the date of the next payment. Then, go down to the BREAKDOWN OF PAYMENTS section, click on 

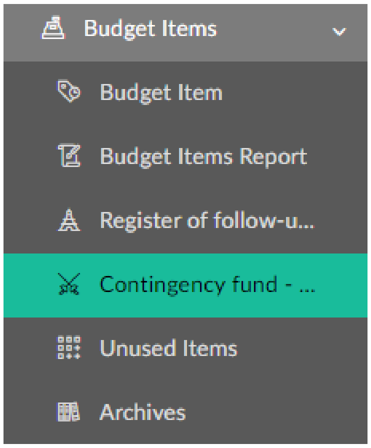
Enter a payment then... Don't forget to reposition the **Payment date** before clicking on 

or here's a little trick; when your last field is completed, click **Enter** on your keyboard to save.

Proceed to the next payment of today and/or prepare for those to come in the short term.

The follow-up when it is done, enter or delete the follow-up date. You can keep follow-up notes.

Report; Contingency fund - Maintenance book

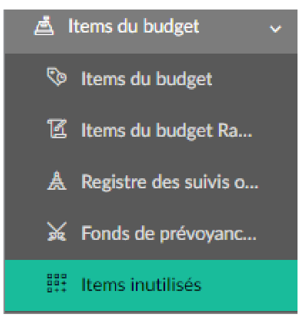


This report is displayed in remaining useful year grouping. That is to say that the items whose useful life is equal in remaining years are grouped together.

It is easy to see which Items should in principle be replaced or updated in the coming years.

To view the item's file, click on the 3 small green dots **...** of the line and then on **Edit.**

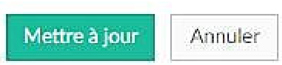
Unused Items



This report shows unused Items in the budget;

Or; Item type changed from **Expense** to **Unused Item.**

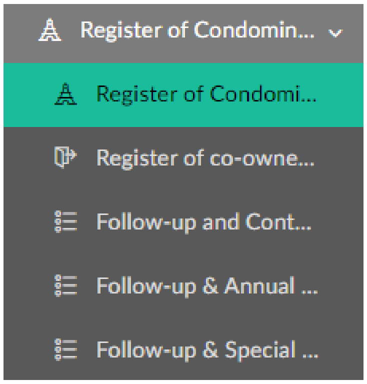
To use an item, search from the **Description column of the item.** Open the form by clicking on the three small green dots **...** then on **Edit.** Complete the form according to the above instructions.

When the form is completed, click on  .

Archives Section; It is one-time expenses or transactions.

Report; Register of condominium

In force.



The register of condominium is the detailed registration of co-owners, private units as well as common area units for restricted use, abbreviated at **CondoLogy** **ACUR**.

This section stores the breakdown of transactions, unit history, documents, co-owner(s), details of the private unit and administers the contributions until collection and/or recovery.

Explanation of the form

Section; Unit Management

Pay attention and **take your time.** This section is intended for the administration of private units.

Field name	Description	Mandatory
Reminder date	Date to follow up on the unit for payment of dues or for file follow-up.	Yes
Management status	Choose current unit management status	Yes
Send account statement monthly	Check this box to automate the sending of a monthly account statement.	Suggested
Acknowledgement of payment	Choose an acknowledgement of receipt if a payment is collected	Suggested
Balance payable previous year	Indicate if there is a balance due from the previous year's budget.	Yes
Follow-up to do	Note on the follow-up to be carried out.	Suggested

Enter a reminder date for the private unit. (Often associated with the date of the next contribution or file follow-up) Enter the management status of the private unit in relation to documentation or for contributions. Check box to send statement of account monthly on the statement of contributions. Select an acknowledgement of receipt when collecting a payment	Reminder date yyyy-MM-dd Management status - Sélectionner - Send account statement monthly Check this box to automate the sending of a monthly account statement. Acknowledgment of payment - Sélectionner -
Balance payable previous year .00 $	If a balance is unpaid from the previous year's budget, enter it.
Enter a text course of the follow-up to be done, it will be visible in the report on the private unit if necessary.	Communication B I U DejaVuSans 10
Send communication Check the box and the communication will be sent automatically.	Check the box and the communication will be sent automatically.

Section; Breakdown of the results (To be completed after the calculation of the contributions)

Jump over it for now! We will come back to this after the calculation of the contributions (condo fee).

At this stage, **CondoLogy** will not calculate the amounts paid because the automation requires certain important fields to be completed beforehand.

All fields are automated… nothing has to be completed!

Section; Breakdown of transactions (To be completed after the calculation of the contributions)

Jump over it for now! We will come back to this after the calculation of the contributions (condo fee).

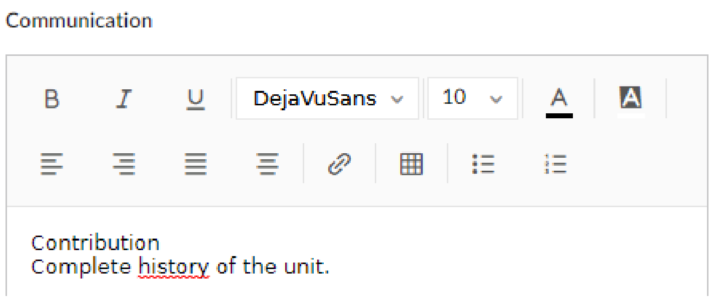
At this stage, **CondoLogy** will not calculate the amounts paid because the automation requires certain important fields to be completed beforehand.

Section; Unit history and document

This section is used to archive the history of the condominium and may contain digitized documents.

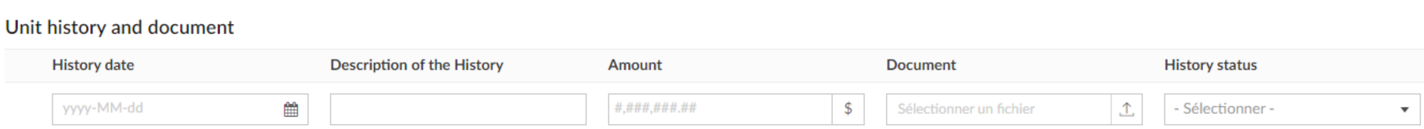
This section can be completed now or later after administration by **CondoLogy** is launched.

Tip: Enter in the **Communication** field to complete the Unit History.



This section stores the breakdown of transactions, unit history, documents, co-owner(s), details of the private unit and administers the contributions until collection and/or recovery.

Field name	Description	Mandatory
History date	Enter a date from the history if necessary	Yes
History Description	Enter a brief description of the history	Yes
Amount	If an amount is part of the history, enter it	Yes
Document	Uploaded a document related to the history	Suggested
History status	Choose the appropriate history status	Yes



Click on + Add New to add a history of the private unit.

When the form is completed, save the form by clicking on  at the bottom of the page.

Section; Co-owner(s)

This section is reserved for the description of the co-owner(s) of the private unit, which can also be a corporation.

Field name	Description	Mandatory
Correspondence language	Select the language of communication of the co-owner	Suggested
Co-owner first and last name 1	Prefix, First name, Last name of the first co-owner	Yes
Email of co-owner 1	Enter the email address of the first co-owner	Yes
Telephone or mobile co-owner 1	Enter the telephone number of the first co-owner	Yes
Percentage of unit 1	Enter the share held by the first co-owner	Suggested
Company as co-owner	Enter the name of the company if it is co-owner	Suggested
Address	Enter the address of the company if co-owner	Suggested
Co-owner since	Enter the date of taking possession of the private unit	Yes
Co-owner first and last name 2	Prefix, First name, Last name of the second co-owner	Yes
Co-owner email 2	Enter the email address of the second co-owner	Yes
Telephone or mobile co-owner 2	Enter the phone number of the second co-owner	Yes
Percent of Unit 2	Enter the share held by the second co-owner	Suggested
Company as co-owner	Enter the name of the company if it is co-owner	Suggested
Address	Enter the address of the company if co-owner	Suggested

Enter the co-owner's preferred correspondence language. Enter the prefix, first name and last name of the co-owner.	Correspondence language - Sélectionner - Co-owner first and last name 1 Aucun Prefix First name Last name
Email of co-owner 1 Telephone or mobile co-owner 1 +1 506-234-5678	Enter the email of the co-owner And His phone or mobile.
Enter the percentage of the co-owner of the private unit.	Percentage of unit 1 %
	If a company is co-owner, list it. Enter the mailing address of the business.

Address [ ] Address [ ] City [ ] Province [ ] Postal Code	
Enter the date of possession.	Co-owner since yyyy-MM-dd

It is possible to register a second co-owner of the private unit.

Section; Private unit

This section is reserved for entering details relating to the private unit.

Field name	Description	Mandatory
Land registry number	Enter the cadastral number of the certificate of location of the unit	Suggested
Number of square feet	Enter the total number of square feet of the private unit	Yes
Private unit number	Enter the number of the private unit	Yes
Agent of record	Indicate if there is an agent for the private unit	Suggested
share	Indicate the percentage of the share entered in the deed of co-ownership	Yes
Total quotas	Automatic calculation of total co payments	Automatic
Key given to the administration	Indicate if a key of the private unit has been given to the CA	Suggested
Status of the private unit	Indicate the status of the private unit	Yes
Occupant with reduced mobility	Indicate if the occupant has reduced mobility	Suggested

Enter the cadastral number. Enter the number of square feet of the private unit. Enter the number of the private unit.	Land registry number [ ] Number of square feet [ ] Private unit number [ ]
	If the private unit is administered by a agent or manager,

Mananger on file - Sélectionner -	enter it.
Enter the share percentage of the private unit available in the Deed of co-ownership. Total calculated automatically from the percentage of the shares of the co-ownership.	Share % Total of shares %
Key given to the administration - Sélectionner - Status of the private unit - Sélectionner - Occupant with reduced mobility	Indicated if a key to the private unit has been given to the administration. Indicated the status of the private unit. Check the box if the private unit is inhabited by an occupant with reduced mobility.

When the form is completed, save the form by clicking on Mettre à jour Annuler at the bottom of the page or continue.

Section; Condominium Insurance

This section is reserved for the registration of details relating to the insurance of the condominium.

Field name	Description	Mandatory
Beginning of coverage	Indicate the start date of the insurance cover	Yes
Insurance company	Indicate the name of the insurance company	Yes
CA-approved insurer	Check the box to confirm the choice of CA	Suggested
Deductible amount	Indicate the amount of the deductible (self-insurance amount)	Yes
End of coverage	Indicate the end date of the insurance cover	Yes
Police number	Indicate the insurance policy number	Yes
Proof of insurance	Uploaded proof of insurance	Suggested
Liability amount	Indicate the amount of liability coverage	Yes

Enter the start date of the insurance coverage.	Beginning of coverage yyyy-MM-dd To be completed if no proof provided.
	Enter the name of the insurance company.

Insurance company CA-approved insurer	Check the box if the proof of insurance is approved by the board of directors.
Enter the amount of the deductible to be paid by the co-owner in the event of a claim.	Deductible amount #,###,###.## $
End of coverage yyyy-MM-dd	Enter the end date of the insurance coverage.
Enter the condominium insurance policy number.	Police number
Proof of Insurance Sélectionner un fichier Upload insurance document containing coverage details.	Upload proof of condominium insurance.
Enter the amount of civil liability coverage.	Liability amount #,###,###.## $

Section; Contribution

This section is reserved for entering details relating to the common charges of the private unit. Please note that many fields are automatically calculated.

Field name	Description	Mandatory
Administered Condominium	Select the condominium	Yes
Administration started on	Indicate the start date of the year of administration	Yes
Administration finished on	Indicate the end date of the year of administration	Yes
Current fiscal year	Indicate the year being administered	Suggested
Date annual subscription sent	Enter the date the annual assessment notice was sent	Yes
Annual subscription status	Enter the status of the annual contribution	Yes
Collection procedure	Uploaded a scanned document of the collection procedure	Suggested
Total annual contribution	Total amount of the annual budget	Automatic
Annual fee private portion	Automatic calculation of the annual contribution of the private unit	Automatic
ACUR annual fee	Automatic calculation of the use of the common area for restricted use	Automatic
Total annual contribution	Automatic calculation of all contributions to be paid by the co-owner	Automatic

Payment method	Indicate the method of payment of the co-owner	Yes
Contribution amount	Automatic calculation according to payment method	Automatic
Special contribution status	Choose the status of the special contribution	Yes
Payment deadline	Enter the deadline for payment of the special contribution	Yes
Total special contribution	Automatic calculation of the total of the special contribution	Automatic
Private unit special contribution	Automatic calculation of the special contribution	Automatic
Description	Enter a short detailed description of the special contribution	Yes

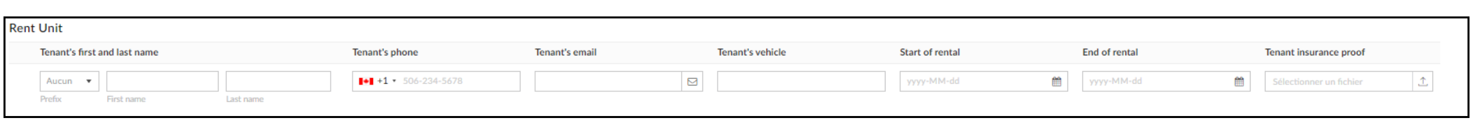
Administered Condominium - Sélectionner - Administration started on yyyy-MM-dd Administration finished on yyyy-MM-dd	Select the condominium Administration start date And Administration end date.
Enter the year being administered.	Current fiscal year
Date annual subscription sent yyyy-MM-dd Annual subscription status - Sélectionner - Collection procedure Sélectionner un fichier	Enter the date of the annual contribution. Choose the status of the annual contribution. Uploaded the collection procedure.
Automatic calculation of the total annual budget. Automatic calculation of the annual fee for the private portion.	Total annual budget #,###,###.## $ Annual fee private Unit #,###,###.## $
ACUR annual fee #,###,###.## $ Total annual contribution .00 $	Automatic calculation of the annual fee for common areas for restricted use attached to the private unit. Automatic calculation of the annual contribution.

Payment method - Sélectionner - Contribution amount #,###,###.## $	Indicate the mode of payment chosen by the co-owner of these contributions. Automatic calculation of the contribution according to the method of payment chosen.
Special contribution	
Special contribution status - Sélectionner - Payment deadline yyyy-MM-dd	Enter the status of the special contribution (instructions are provided on this subject). Enter the deadline for making payment of the special contribution sent to the co-owners.
These fields are automatically calculated on the amount of the special contribution.	Total special contribution .00 $ Private unit special contribution .00 $
Description	The description will be included in a self-email that describes the reason for the special contribution.

Section; Rent Unit

This section is reserved for recording details relating to the private unit being rented.

Field name	Description	Mandatory
Tenant's first and last name	Indicate the first and last name of the signatory of the lease	Yes
Tenant's phone	Indicate the telephone number of the signatory of the lease	Yes
Tenant's email	Indicate the email of the signatory of the lease	Yes
Tenant's vehicle	Indicate the brand of the vehicle of the signatory of the lease	Yes
Start of rental	Indicate the start date of the rental	Yes
End of rental	Indicate the end date of the rental	Yes
Tenant insurance proof	Upload the proof of insurance of the signatory of the lease	Yes



Build the history of the tenants of the private unit.

Click on + Add New to add a new tenant once the fields have been completed.

When the form is completed, save the form by clicking on Mettre à jour Annuler at the bottom of the page.

Section; Common Areas with restricted use

This section is used to evaluate the cost of contributions associated with common areas for restricted use ACUR (not cadastrated) when the **budget items** are completed and the check box on the Calculate in **Description of the Condominium** form in the **Common areas section** is checked.

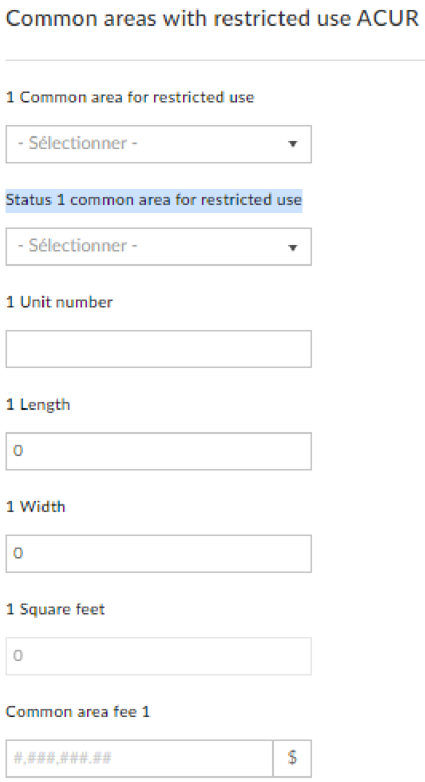
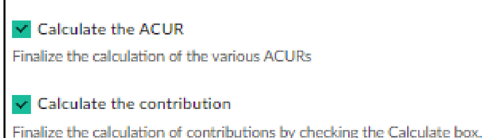
If; The board of directors has decided not to contribute to the common areas for restricted use or if the common areas for restricted use are cadastralized. Do not complete all four sets of fields for this purpose Ny how ACURs are calculated according to the field Calculate ACUR by.

Calculate the contribution

Check the box Finalize the calculation of contributions by checking the Calculate box. at the bottom of the center column to finalize the calculation of the common charges (condo fees) assessed to the co-owners.

IF; The Board of Directors has decided to assess the common areas for restricted use or if the common areas for restricted use are not registered. This section includes 4 common area calculations for restricted use.

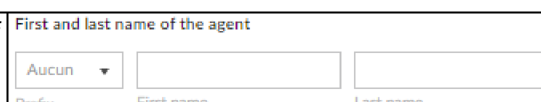
Field name	Description	Mandatory
1 Common area for restricted use	Choose the common area for restricted use	Yes
Status 1 common area for restricted use	Indicate the status of the area	Suggested
1 Unit number	Indicate the unit number of the common area	Yes
1 Length	Indicate the number of feet in its length	Yes
1 Width	Indicate the number of feet in its width	Yes
1 Square feet	Calculate the number of square feet of the unit	Automatic
Common area fee 1	Calculation of the contribution from the number of square feet x by the assessed cost of maintenance	Automatic

	The cost of maintenance per square foot of the common areas has been assessed in the DESCRIPTION OF THE CONDOMINIUM form. The COMMON AREA CONTRIBUTION field is automatically calculated and added to the co-owner's contributions.
Select how ACUR will be calculated from the **Calculate ACUR by** field then. This box is to finalize the contributions of the common charges (condo fees) of the ACUR. See Explanation. This box is to finalize the contributions of common charges (condo fees). See Explanation.	

Agent Section

This section is reserved for entering details relating to the agent of the private unit.

Field name	Description	Mandatory
First and last name of the agent	Indicate the first and last name of the agent if applicable	Yes
Agent's email	Indicate the e-mail address of the agent if applicable	Yes
Agent's phone or mobile	Indicate the agent's telephone and/or mobile phone if applicable	Yes
Copy of mandate	Uploaded the copy of the mandate	Yes

Enter the prefix, first name and last name of the agent of the private unit.	

Agent's email	Enter the email address of the agent of the private unit.
Enter the telephone and mobile number of the private unit.	Agent's phone or mobile +1 506-234-5678
Copy of mandate Sélectionner un fichier	Uploaded a copy of the proxy mandate for the private unit.

It is the right time!

It is now time to complete the **Register of condominium** by completing a form for each unit or to import your register.

Finalization of the calculation of Common Charges (condo fees)

Explanation;

The automatic calculation of the cost of a common area for restricted use comes from the calculation of the **Budget Items** associated with the maintenance and upkeep of the common areas determined during the production of the budget. If the use of a common area is exclusive, the cost of this use is automatically calculated and assessed to the co-owner who uses it.

These four field spaces are for evaluating the maintenance cost of using ACURs.
To finalize the calculation of ACUR common charges, choose between;

1. Percentage
2. Square feet
3. Fixed Contribution

and check the box ☑ Calculate the ACUR Finalize the calculation of the various ACURs .

To finalize the calculation of the contributions for common charges (condo fees) check the box
☑ Calculate the contribution
Finalize the calculation of contributions by checking the Calculate box.

Go back to the **Contributions section** then select the **Payment method** chosen to pay the contributions for common charges. The calculation of **the Contribution amount** will be entered automatically.

To finalize the form, click on Mettre à jour Annuler .

It is possible to finalize the calculation of the mass contributions. But this way of doing things will only update the calculation of the contributions.

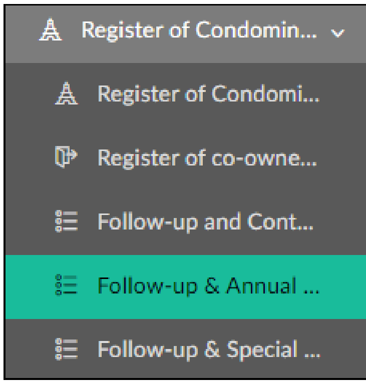
1- You direct to the Registry of the condominium Report then click on ☑ Adminis then on **Edit.** Do a search

× Calculate the ACUR and click **Apply.**

2- You direct to the Register of the condominium Report then click on Adminis then on **Edit.** Do a search × Calculate the contribution and click **Apply.**

You have just finalized an important condominium management calculation for this unit.
Congratulations and let's move on!

Sending the notice of annual contribution

	**All co-owners receive one and simultaneously !** The notice of annual contribution is so that the Board of Directors (the CA) can meet the obligations of the common charges with the ultimate goal of preserving the common good. From page 52 it's transaction management.

Bv entering the current date in Date annual subscription sent yyyy-MM-dd you will have to send the notice of assessment manually.

Here's how;

Go to **Register of condominium**, then to **Follow-up & annual contribution**.

This report is the list of private units grouped in ascending order of units.

Select the private units by clicking on the checkbox Reminder date.

Then on Envoi cotisation annuel just above. **They are sent!**

Then mass-adjust the **Annual subscription status** to **Sent.** Here's how; Check Date er and then **Edit.** Do your research as follows; × Annual subscription status then click **Apply** and **Yes.**

Once sent, the status of the **Management status field** changes to Annual subscription follow-up.

Automated sending

For automated sending, enter a date after today's date. Select Date er then **Edit.** Do your research as follows; × Date envoi cotisation annuelle then, you will program the sending of the notices of annual dues at 4:00 p.m. on the date entered. You will find the self-mail template below.

Then mass-adjust the **Annual subscription status** to **Sent.** Check Date er and then **Edit.** Do your research as follows; × Annual subscription status then choose **Sent** then click on **Apply** and **Yes.**

Once sent, the status of the **Management status** field changes to Annual condo fee follow up ×

Enter the Date of sending the annual dues	Date annual subscription sent yyyy-MM-dd
Annual subscription status - Sélectionner -	Choose the status of the annual contribution
Pre-programmed auto-email template for sending annual dues manually and automatically.	**CondoLogie** An administrative science application that does everything for the condominium ! Hello ${Pr_nom_et_Nom_copropri_taire_1}, ${Pr_nom_et_Nom_copropri_taire_2} et/ou ${Mandataire_au_dossier}. **Your unit number:** ${Num_ro_d_unit} This is the time of year when the Board of Directors has established a budget that reflects the needs of our condominium and that ensures significant maintenance of the preservation of the common good. **Here are the details of your annual dues:** **Year under administration:** ${Ann_e_d_administration} **Total annual budget:** ${Total_budget_annuel}$ **Your condominium share:** ${Quote_part}% **Total of your ACUR:** ${Cotisation_annuelle_ACUR}$ ACUR = common areas for restricted use **Your annual contribution:** ${Cotisation_annuelle_partie_privative}$ **Your payment method:** ${Mode_de_paiement} **Amount of your contribution:** ${Montant_de_la_cotisation}$ Thank you for your cooperation and have a nice day!

	Your Board of Directors ${Copropri_t_administr_e} Administered with CondoLogie.com 2023 - All Rights Reserved

If; You received the **Payment method** of the co-owner including the details for collecting the contributions. Go to the **Follow-up & annual contributions** report then, open the file of the co-owner concerned by clicking on the three small green dots **...** of his file then, on **Edit.** Change the **Management Status** to **In Progress.**

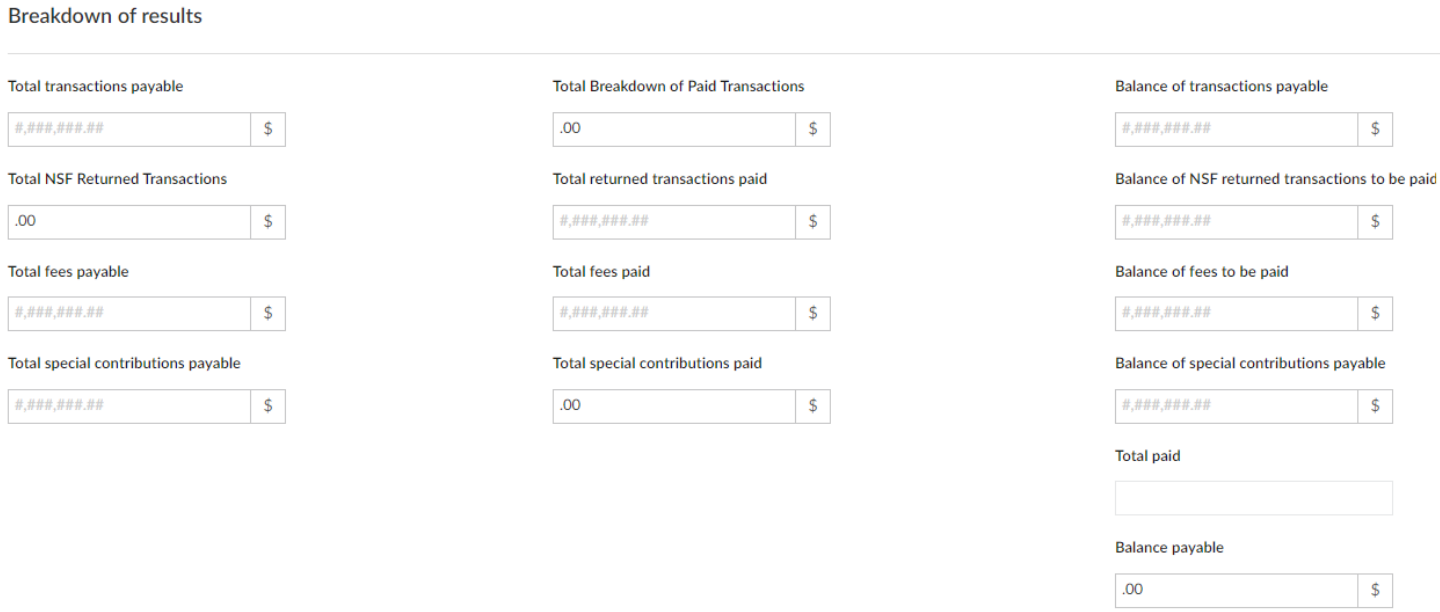
Then head to the **Contribution section** a little further down and change the **Annual subscription status** to **Received & Up to Date.**

When the form is completed, save the form by clicking on Mettre à jour Annuler at the bottom of the page.

Section; Breakdown of results

All fields are automatically calculated, **nothing must be entered!**

Field name	Description	Mandatory
Left column		Automatic
Total transactions payable	Automatic calculation of the total of transactions to be paid	Automatic
Total NSF Returned Transactions	Automatic calculation of returned payments not paid by the financial institution.	Automatic
Total fees payable	Automatic calculation of total fees charged	Automatic
Total special contributions payable	Automatic calculation of special contributions to be paid	Automatic
Center column		Automatic
Total Breakdown of Paid Transactions	Automatic calculation of total paid.	Automatic
Total returned transactions paid	Automatic calculation of paid returned transactions	Automatic
Total fees paid	Automatic calculation	Automatic
Total special contributions paid	Automatic calculation	Automatic
Right column	Automatic calculation	Automatic
Balance of transactions payable	Automatic calculation	Automatic
Balance of NSF returned transactions to be paid	Automatic calculation	Automatic
Balance of fees to be paid	Automatic calculation	Automatic
Balance of special contributions payable	Automatic calculation	Automatic
Balance payable	Automatic calculation of the balance to be paid.	Automatic



Section; Breakdown of transactions **(To be completed after the calculation of the contributions)**

The obsession of any programmer, application developer containing calculations. Regardless of the confirmation, alert and/or text color at the time of a transaction, error is always possible!

Take your time before checking the **Transaction Confirmed box** to update the Results Breakdown automatically.

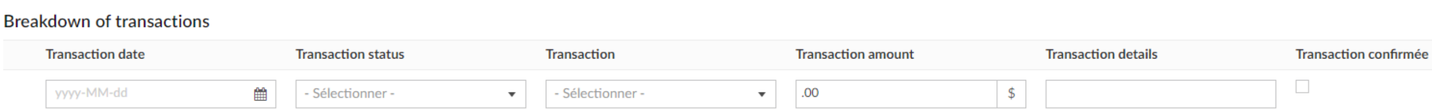
Let's go!

Each co-owner is responsible for the common charges relating to his share. The breakdown of transactions is the entry of the charges and/or payments received in order to pay the common charges of each of them.

If; Your fiscal year has already started, you can enter the transactions made as soon as the form is set up after the contributions have been calculated.

Field name	Description	Mandatory
Transaction date	Enter the date of the transaction	Yes
Transaction status	Indicate the status of the transaction	Yes
Transaction	Selection of transaction type	Suggested
transaction amount	Indicate the amount of the transaction	Yes
Transaction details	Enter the details relevant to the transaction	Suggested
Confirmed transaction	Checkbox to perform the calculations displayed in the results breakdown	Yes

At the appropriate time, head to the section:



Click on + Add New to add a contribution and/or a transaction.

However, it may happen that payments are not honored. This section makes the calculation and the administrative follow-up. A special contribution can also be administered in this section.

Mandatory: **One line per transaction, regardless of the transaction!**

In the event of an error, uncheck the **Confirmed transaction box** of the line that contains the error. Then, correct the error and check the Confirmed transaction box again.

When the form is completed, save the form by clicking on Mettre à jour Annuler at the bottom of the page.

If a co-owner has not regularized the situation of the annual contribution, here is the automatic procedure;

First reminder:

Notice of assessment +10 days from the date of sending the annual assessment notice, an auto-e-mail will be sent to the owners and managers. The **Annual subscription status** will be increased to **Reminder.**

Reminder Notice of contribution +10 days from the date of sending if the **Annual contribution status** is still **Sent.**	**CondoLogy** An administrative science application that does everything for the condominium! Hello ${Pr_name_and_Name_co-owner_tary_1} ${Pr_name_and_Name_co-owner_tary_2} ${ Pr_name_and_name_of_agent } **Reminder + 10 days** This automatic email is to notify you that the Board of Directors has not received your method of payment, your post-dated checks and/or your banking information

in order to cover your annual dues.

The date of sending the ${ Date_envoi_cotisation_annuelle } of your annual contribution will be more than 10 days tomorrow.

Here are the details of your annual dues

Total annual dues: ${ Total_budget_annuel }

Your share: ${ Quote_ share }%

Total of your annual contribution: ${ Contribution_annuelle_partie_privative }
Total of your ACUR: ${ Contribution_annuelle_ACUR } $
ACUR = Common area for restricted use

Grand total of your annual dues: ${ Total_cotisation_annuelle } $

Your method of payment according to the benefit of the term: ${ Mode_de_paiement }
(Preferred method of payment = PAD pre-authorized debit. Accepted method = check, Interac transfer)

Your contribution according to your method of payment: ${ Montant_de_la_cotisation } $

When replying to this email, indicate your method of payment, your post-dated checks and/or your banking information in order to cover your annual dues.

Please quickly update your file to avoid a collection procedure.

Good day!

Your Board of Directors
${ Co-owner_t_admin }

If; After the first reminder you received the **Payment method** of the co-owner including the details for collecting the contributions. Go to the **Monitoring & annual contributions report**, then open the file of the co-owner concerned by clicking on the three small green dots **...** on his file, then on **Edit.** Change the **Management Status** to **In Progress.**

Then head to the **Contributions section** and change the **Annual subscription status** field to **Received & Up to Date.**

Then update the page by clicking Mettre à jour Annuler

Sending an acknowledgement of receipt, here's how;

To send an acknowledgement of receipt of the payment terms for the annual dues, make sure that the **Acknowledgement of payment** field is set to **Annual dues** before saving the record.

Here is the model of the acknowledgement of receipt;	**CondoLogy** An administrative science application that does everything for the condominium! Hello ${prefix3} ${Pr_nom_et_Name_co-owner_taire_1}. **Your unit number;** ${ Num_ro_d_unit } Method of payment of your contributions This automatic email is to inform you that we have received and recorded your method of payment of your contributions. **Modality;** ${ Mode_de_payment } Thank you for your cooperation! **Your Board of Directors** ${ Co-owner_t_administr_e } Administered with CondoLogy.com - All Rights Reserved 2022

When the form is completed, save the form by clicking on Mettre à jour Annuler at the bottom of the page.

Second reminder:

Notice of assessment +15 days from the date of sending the annual assessment notice, an auto-e-mail will be sent to owners and managers. **Management Status** will be upgraded to **Perception.**

From this date, the collection procedure must begin according to the deed of co-ownership in accordance with the Civil Code of Quebec.

Reminder Notice of contribution +15 days from the date of sending if the **Annual contribution status** is still **Sent.**	**CondoLogy** An administrative science application that does everything for the condominium ! Hello ${Pr_nom_et_Nom_copropri_taire_1} ${Pr_nom_et_Nom_copropri_taire_2} ${Pr_nom_et_nom_du_mandataire} **Reminder + 15 days** This automatic email is to notify you that the Board of Directors has not received your method of payment, your post-dated checks and/or your banking information in order to cover your annual dues.

	The date of sending the **${Date_envoi_cotisation_annuelle}** of your annual contribution will be more than **15 days** tomorrow. Here are the details of your annual dues **Total annual dues:** ${Total_budget_annuel} **Your share**: ${Quote_part}% **Total of your annual contribution:** ${Cotisation_annuelle_partie_privative} **Total of your ACUR:** ${Cotisation_annuelle_ACUR} $ ACUR = Common area for restricted use **Grand total of your annual contribution:** ${Total_cotisation_annuelle} $ **Your method of payment according to the benefit of the term:** ${Mode_de_paiement} (Mode de paiement privilégié = DPA débit pré-autorisé. Mode accepté = chèque, virement Interac) **Your contribution according to your method of payment:** **${Montant_de_la_cotisation} $** When replying to this email, indicate your method of payment, your post-dated checks and/or your banking information in order to cover your annual dues. Starting tomorrow administration fees may apply. Please quickly update your file to avoid a collection procedure. Good day! **Your Board of Directors** ${Copropri_t_administr_e} Administered with CondoLogie.com 2023 - All Rights Reserved

If; After the second reminder you received the **Payment method** of the co-owner including the details for collecting the contributions. Go to the **Monitoring & annual contributions report**, then open the file of the co-owner concerned by clicking on the three small green dots **...** on his file, then on **Edit.** Change the **Management Status** to **In Progress.**

Then head to the **Contributions section** and change the **Annual subscription status** field to **Received & Up to Date.**

Then update the page by clicking Mettre à jour Annuler

Sending an acknowledgement of receipt, here's how;

To send an acknowledgement of receipt of the payment terms for the annual dues, make sure that the **Acknowledgement of payment** field is set to **Annual dues** before saving the record.

Here is the model of the acknowledgement of receipt;	**CondoLogy** An administrative science application that does everything for the condominium! Hello ${prefix3} ${Pr_nom_et_Name_co-owner_taire_1}. **Your unit number;** ${ Num_ro_d_unit } Method of payment of your contributions This automatic email is to inform you that we have received and recorded your method of payment of your contributions. **Modality;** ${ Mode_de_payment } Thank you for your cooperation! **Your Board of Directors** ${ Co-owner_t_administr_e } Administered with CondoLogy.com - All Rights Reserved 2022

When the form is completed, save the form by clicking on Mettre à jour Annuler at the bottom of the page.

If; the mode of payment of dues is not received, the collection/recovery procedure on page 58 will have to be put forward since, unsurprisingly, there will be a default in payment.

Report: Follow-up and Contributions

The report is by default grouped in descending order of management status in order to view the most important first.

The co-owners' files are accessible by clicking on the three small green dots **...** and then on **Edit.**

Unit Management section for all follow-ups related to a private unit. The 3 fields needed for tracking are; **Reminder Date, Management Status and Communication.**

Send monthly statement checkbox is for sending a monthly statement.

To send a Communication.

Copy/pasted a model, create your models and/or compose a text then, check the box ☐ Send communication .

Pre-programmed template of the Communication;	**CondoLogy** An administrative science application that does everything for the condominium ! Hello, Your text here Regards **Your Board of Directors** Administered with CondoLogy.com - All Rights Reserved 2023

Save the file by clicking on; Mettre à jour Annuler here we go!

For collecting contributions

Go to the **Register of condominium** form, then to the **Follow up and contributions** form. Go direct to the line of the unit whose contribution is to be collected. The file is accessible by clicking on the three small green dots **...** then on **Edit.**

Set the **Reminder Date** to the date of the next monthly dues payment and leave the **Management Status** at **In Progress.**

Go to the **Breakdown of transactions section** then click on **+ Add New** to complete the fields of the transaction line. Do not forget to confirm the transaction by checking the **Confirmed transaction** checkbox to the right of the transaction line. A series of automated calculations take place to update the totals in the **Breakdown of transaction section.** If more than one transaction is to be completed, go ahead!

Sending an acknowledgement of receipt, here's how;

To send an acknowledgement of receipt of the collection or deposit of the monthly contribution, make sure that the **Acknowledgement of payment** field is set to **Monthly condo fee** before saving the record.

No need to copy and paste this model in field Communication. It is a Pre-programmed	**CondoLogy** An administrative science application that does everything for the condominium ! Hello ${prefix3} ${Pr_nom_et_Name_co-owner_taire_1}. **Payment of your monthly dues received**

template of the acknowledgement of monthly condo fee;	This automatic email is to notify you that the last payment of your monthly dues has been received and deposited. Thank you for your cooperation! Your Board of Directors ${ Co-owner_t_administr_e } Administered with CondoLogy.com - All Rights Reserved 2023

Once the transaction(s) have been completed, check the box in the last **Confirmed Transaction column,** the Breakdown **of results** section will be updated automatically. When all the modifications have been made to the follow-up of the private unit, save the file by clicking on;

Mettre à jour Annuler .

Collection - Recovery

When a dues payment is returned by a bank, the collection process must begin.

Here's how:

Go to the **Register of condominium form,** then to the **Follow-up and contributions** form. You direct to the line of the unit whose the contribution has been returned. The file is accessible by clicking on the three small green dots **...** then on **Edit.**

Leave the **Reminder date** at the date of the next payment of the monthly contribution but set the **Management status** to **Collection 0-30 days + Acknowledgement of receipt of payment** to **Monthly condo fee returned unpaid** or **Monthly condo fee returned unpaid + administrative costs.**

Head to the **Breakdown of transactions section**, click on **+ Add New** then, complete a new transaction by setting the **Transaction status** to **Returned NSF + Transaction** to **Added to account statement +** enter in **Transaction amount = to the amount returned + Transaction details** if any **+ Confirmed transaction** by checking the box.

If the administration has a procedure to add an administrative fee, click on **+ Add New** then complete a new transaction by setting the **Status of the transaction** to **NSF Fee +** all next field.

Confirmed Transaction checkbox is checked, automatic calculations take place and display the calculated totals of; **Total NSF Returned Transactions, Outstanding Fee Balance,** and **Total Unpaid.**

Once the private unit transactions have been completed, save the file by clicking on;

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2024v0117

Automatically a pre programmed email is sent to the co-owner like the **First Reminder** model right here below and **CondoLogy** takes over!

Trick: When your mouse is in the **Transaction Amount** or **Transaction Details fields** and is flashing, click **Enter** on your keyboard to save the form rather than going down to the bottom of the page.

First Reminder

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An administrative science application that does everything for the condominium!

Hello ${prefix3} ${Pr_nom_et_Name_co-owner_taire_1}.

First Reminder

This automatic email is to inform you that the last payment of your monthly dues has been returned to us by your bank.

The following amount, including administrative costs, must be paid as soon as possible in order to avoid any new procedure.

Amount of contribution(s) to be made; **${Balance_of_returned_transactions_NSF_pay 1}$**

Amount of administrative costs; **${ Fee_balance_pay } $**

Total to pay; **${ Total_ outstanding }$**

By Interac e-Transfer

${ zoho.adminuserid }

Security code ; Your unit number

Please make your payment promptly!

Your Board of Directors
${ Co-owner_t_administr_e }

If: The payment of the contribution is received, here is what to do:

Go to the **Register of condominium** form, then to the **Follow-up and contributions** form. You direct to the line of the unit whose remittance was returned. The file is accessible by clicking on the three small green dots **...** then on **Edit.**

Leave the **Reminder Date** as the date of the next monthly dues payment but set the **Management Status** to **In Progress.**

Go to the **Breakdown of transactions section** then, complete a new transaction with the **Status of the transaction** at **Returned NSF Paid** then, complete a new transaction with **Transaction Status** at **NSF Fee Paid.**

Confirmed Transaction checkbox is checked, automatic calculations take place and display the calculated totals of; **Balance of NSF returned transactions to be paid, Balance of fees to be paid,** and **Total paid.**

Sending an acknowledgement of receipt, here's how;

To send an acknowledgement of receipt of an unpaid monthly subscription, make sure that the **Acknowledgement of payment field** is set to **Monthly condo fee returned unpaid paid** or **Monthly condo fee returned unpaid paid + administrative costs** before saving the file.

Once the private unit transactions have been completed, save the file by clicking on;

Mettre à jour Annuler .

CondoLogy

An administrative science application that does everything for condominium !

Hello ${prefix3} ${Pr_nom_et_Nom_copropri_taire_1}.

Returned payment received

This automatic email is to notify you that the last payment of your monthly dues and/or your administrative fees have been received and deposited.

Amount of outstanding dues; ${Solde_des_transactions_retourn_es_NSF_payer1} $

Amount of outstanding fee dues; ${Solde_des_frais_payer}$

Total outstanding; ${Total_impay}$

Thank you for your cooperation!

Your Board of Directors
${Copropri_t_administr_e}

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2024v0117

First reminder & 3rd reminder

When a contribution remittance is returned by a bank, the collection process at this point is in progress. Automatically a self-email was sent to the co-owner like the **Reminder template** just down here -10 days from the Upcoming contribution in **Reminder Date.**

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An administrative science application that does everything for the condominium !

Hello ${prefix3} ${Pr_nom_et_Nom_copropri_taire_1}.

Reminder; Late contribution 0-30 days

This automatic email is to inform you that the last payment of your monthly dues has been returned to us by your bank.

The returned and unpaid amount and, if applicable, the administrative costs must be paid as soon as possible in order to avoid any new collection and/or recovery procedure.

Amount of contribution(s) to be made; **${Solde_des_transactions_retourn_es_NSF_payer1}$**

Amount of administrative costs; **${Solde_des_frais_payer}$**

Total to pay; **${Total_impay}$**

By Interac e-Transfer

${zoho.adminuserid}

Security code ; Your unit number

Please make your payment promptly!

Your Board of Directors
${Copropri_t_administr_e}

If: The payment of the contribution is received, here is what to do:

Go to the **Register of condominium** form, then to the **Follow-up and contributions** form. You direct to the line of the unit whose remittance was returned. The file is accessible by clicking on the three small green dots **...** then on **Edit.**

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Leave the **Reminder Date** as the date of the next monthly dues payment but set the **Management Status** to **In Progress.**

Go to the **Breakdown of transactions section** then, complete a new transaction with the **Status of the transaction** at **Returned NSF Paid** then, complete a new transaction with **Transaction Status** at **NSF Fee Paid.**

Confirmed Transaction checkbox is checked, automatic calculations take place and display the calculated totals of; **Balance of NSF returned transactions to be paid, Balance of fees to be paid,** and **Total paid.**

Sending an acknowledgement of receipt, here's how;

To send an acknowledgement of receipt of an unpaid monthly subscription, make sure that the **Acknowledgement of payment field** is set to **Monthly condo fee returned unpaid paid** or **Monthly condo fee returned unpaid paid + administrative costs** before saving the file.

Once the private unit transactions have been completed, save the file by clicking on;

Mettre à jour Annuler .

CondoLogy

An administrative science application that does everything for condominium !

Hello ${prefix3} ${Pr_nom_et_Nom_copropri_taire_1}.

Returned payment received

This automatic email is to notify you that the last payment of your monthly dues and/or your administrative fees have been received and deposited.

Amount of outstanding dues; ${Solde_des_transactions_retourn_es_NSF_payer1} $

Amount of outstanding dues; ${Solde_des_frais_payer}$

Total outstanding; ${Total_impay}$

Thank you for your cooperation!

Your Board of Directors
${Copropri_t_administr_e}

Second reminder & 4th reminder

If: The payment of the contribution is not received, here is what to do:

Nothing for the moment, CondoLogy automatically takes care of contacting -5 days from the **Reminder Date** of the next payment of the co-owner in default. But nothing prevents any other approach to collection/recovery...

CondoLogy
An administrative science application that does everything for the condominium !

Hello ${prefix3} ${Pr_nom_et_Nom_copropri_taire_1}.

Second Reminder

This automatic email is to inform you that the last payment of your monthly dues has been returned to us by your bank.

The returned and unpaid amount and, if applicable, the administrative costs must be paid as soon as possible in order to avoid any new collection and/or recovery procedure.

Amount of contribution(s) to be made; ${Solde_des_transactions_retourn_es_NSF_payer1}$

Amount of administrative costs; ${Solde_des_frais_payer}$

Total to pay;${Total_impay}$

By Interac e-Transfer

${zoho.adminuserid}

Security code ; Your unit number

Please make your payment promptly!

Your Board of Directors
${Copropri_t_administr_e}

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If: The payment of the contribution is received, here is what to do:

Go to the **Register of condominium** form, then to the **Follow-up and contributions** form. You direct to the line of the unit whose remittance was returned. The file is accessible by clicking on the three small green dots **...** then on **Edit.**

Leave the **Reminder Date** as the date of the next monthly dues payment but set the **Management Status** to **In**

Progress.

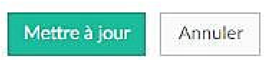
Go to the **Breakdown of transactions section** then, complete a new transaction with the **Status of the transaction** at **Returned NSF Paid** then, complete a new transaction with **Transaction Status** at **NSF Fee Paid.**

Confirmed Transaction checkbox is checked, automatic calculations take place and display the calculated totals of; **Balance of NSF returned transactions to be paid, Balance of fees to be paid,** and **Total unpaid.**

Sending an acknowledgement of receipt, here's how;

To send an acknowledgement of receipt of an unpaid monthly subscription, make sure that the **Acknowledgement of payment field** is set to **Monthly condo fee returned unpaid paid** or **Monthly condo fee returned unpaid paid + administrative costs** before saving the file.

Once the private unit transactions have been completed, save the file by clicking on;



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CondoLogy

An administrative science application that does everything for condominium !

Hello ${prefix3} ${Pr_nom_et_Nom_copropri_taire_1}.

Returned payment received

This automatic email is to notify you that the last payment of your monthly dues and/or your administrative fees have been received and deposited.

Amount of outstanding dues; ${Solde_des_transactions_retourn_es_NSF_payer1} $

Amount of outstanding dues; ${Solde_des_frais_payer}$

Total outstanding; ${Total_impay}$

Thank you for your cooperation!

Your Board of Directors
${Copropri_t_administr_e}

If: The 2nd installment of the contribution is not received at the next payment, here is what to do:

On the date of the payment, continue to collect the contributions according to the mode of payment, complete your transaction by clicking on **+ Add New** and then, begin to assemble your **Unit history and document.** Then, reset the **Reminder Date** to the next contribution as usual.

If; this payment is returned by the bank, go to the **Breakdown of transactions section**, click on **+ Add New** then, complete a new transaction by placing the **Transaction statut** To **Returned NSF etc...**

If; the administration has the procedure of adding an administrative fee, click on **+ Add New** then complete a new transaction by setting the **Transaction statut** to **NSF Fee etc...**

Confirmed Transaction checkbox is checked, automatic calculations take place and display the calculated totals of; **Balance of NSF returned transactions to be paid, Balance of fees to be paid,** and **Total Unpaid.**

If; the contribution is received, follow the instructions on page 62.

It gets more serious. At this point, there is a multitude of additional communication that needs to be put in place. **CondoLogy** has templates. But the Board of Directors must, if it has not already been done, establish the protocol for the collection/recovery of receivables.

Repositioning the next payment date to the next month, automated communications will continue.

This model is quite effective to send as a communication and raises awareness of the issues. You can modify it to reflect the reality of the situation.

To send a Communication.
Copy/pasted a model, create your models and/or compose a text then, check the box ☐ Send communication . Save the file by clicking on; Mettre à jour Annuler here we go!

Explanatory model to be copied/pasted in the field **Communication** of the consequences for the collection and/or recovery of debt. The Board of Directors may increase or decrease the expense amounts shown in the example.	Warning: This document is a model and not an original. Delete the text in the gray frame if you use it for your administrative purposes and modify all the information for information purposes to adapt the document to the reality of your co-ownership. **CondoLogy** An administrative science application that does everything for the condominium ! Hello Mrs. M., Your unit number; WITHOUT DAMAGE We bring to your attention the consequences when one or more contributions are not paid. You have received several communications, but according to your file, no response from you. The Civil Code of Quebec and the common law in Canada and our Deed of condominium

	provide procedures for the Board of Director to recover its debt. 1. Formal notice (additional fees for unpaid amounts of $225 + forfeiture of the benefit of the term) 2. Ongoing Small Claims lawsuit (minimum fee of $375 + extra judicial fees) 3. Legal mortgage (minimum fee of $1500 + professional legal fees) 4. Exercise notice and legal mortgage recourse 5. Injunction These procedures are expensive in time and money for the Board of condominium and these costs will have to be borne by your neighbours. As soon as possible, contact your Board to reach an agreement or determine a satisfactory settlement for all parties. Thank you and good day. **Your Board of Directors.** Administered with CondoLogy.com 2023 - All Rights Reserved

If: The 3rd payment of the contribution is not received, here is what to do:

On the payment date, you will see that the status is now In **Recovery +61 days.** Continue to collect contributions according to the payment method provided, enter your transaction then confirm it as usual and set up your **Unit history and document.**

If: the contribution is received, follow the instructions on page 62.

It's getting more and more serious. Which procedure to use?

It may be necessary to call a special meeting of the Board of Director of the condominium in order to vote on a resolution on the procedures to be used for the recovery of the debt.

1. Electronic Communication (Loss of Term Benefit)
2. Telephone communication
3. Formal notice Government of Quebec
4. Small Claims Application Form or common law in Canada
5. Legal mortgage
6. Exercise notice and morgage recourse
7. Injunction

It is strongly suggested that you open a file in the **Register Board of Director activity** form and **Board activity register** and record your meeting there.

Check the different options for recovering unpaid common charges. If necessary, consult the Board of Director lawyer and always pursue the Unit History and document section.

Resource; [RGCQ Association of Managers and Co-owners of Quebec]()

Follow-up & Annual Contributions

The report is by default grouped in ascending order of private units in order to visualize from the first to the last unit.
The co-owners' files are accessible by clicking on the three small green dots **...** and then on **Edit.**

Use the Contributions section for all contribution follow-ups related to a private unit. The 3 necessary fields are; **Current fiscal year, Date annual subscription sent, Annual subscription status.**

Once the modifications have been made to the follow-up of the private unit, save the file by clicking on;
Mettre à jour Annuler .

This report can be printed in two modes;

1- Print as List (copy in report list)
2- Print as Summary (individual sheet of private units)

At the top right of the report click on ≡ then on **Print.** Choose one of the two modes.

Tip: If the print format does not suit you, it is possible to modify the report to be printed. Click Cancel on the print order page. Modify the width of your columns then, on your keyboard, press CTRL + P to view the print format again.

Once the modifications suit your need, print the report.

Follow-up & Special Contribution

A special contribution occurs when an unforeseen event causes a major expense that the contingency fund cannot pay. Instructions for filing a special assessment are noted below on pages 93 and 96.

The report is by default grouped in ascending order of private units in order to visualize from the first to the last unit.
The co-owners' files are accessible by clicking on the three small green dots **...** and then on **Edit.**

Use the Contributions section for all monitoring of special contributions related to a private unit. The 3 necessary fields are; **Special contribution status, Payment deadline, Private unit special contribution.**

Once the modifications have been made to the follow-up of the private unit, save the file by clicking on;

.

This report can be printed in two modes;

1- Print as List (copy in report list)
2- Print as Summary (individual sheet of private units)

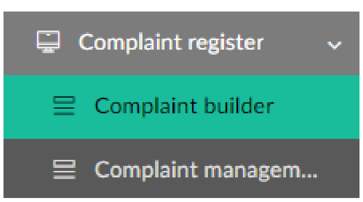
At the top right of the report click on ≡ then on **Print.** Choose one of the two modes.

Tip: If the print format does not suit you, it is possible to modify the report to be printed. Click Cancel on the print order page. Modify the width of your columns then, on your keyboard, press CTRL + P to view the print format again.

Once the modifications suit your need, print the report.

Report; Complaint register

In force.



It is normal for a Board of directors and/or a manager to receive a large number of complaints, especially when the contributions for condo fees are high.

If the condominium has a domain name (.com or .ca), **CondoLogy** can set up a web page including a complaint form. We can also obtain your domain name (.com or .ca). It's inexpensive but brings a world of possibility.

Section; Administration

This section allows the administration of the complaint. Upon receipt of the complaint, **CondoLogy** sent an email confirming receipt of the complaint to the complainant if a web form is in operation.

1- To complete a complaint received by email, click on the **Complaint builder tab.** Use the fields described below.

2- In the **Complaint management report**, navigate to the complaint to be administered. The complaint files are accessible by clicking on the three small green dots **...** and then on **Edit.**

Field name	Description	Mandatory
Administered Condominium	Select the condominium	Yes

Complaint Status	Choose the status of the complaint	Yes
Tracking Date-Time	Indicate the date and time of the complaint follow-up	Yes
Complaint Manager	Indicate the person responsible for handling the complaint	Yes
Send follow-up email	On saving, an auto-email is sent according to status	No
Report	Explanatory text of the processing and conclusion of the complaint	Yes
Image	Uploaded a photo document describing the handling of the complaint	Suggested
Video	Uploaded a video document describing the handling of the complaint	Suggested

Administered Condominium - Sélectionner -	Select the administered condominium.
Select the status of the complaint. Enter the date and time of the next follow-up. Register the complaint handler. Select a p reformatted auto-email template to send to the record backup.	Complaint Status - Sélectionner - Tracking Date-Time yyyy-MM-dd HH:mm:ss Complaint Manager Send follow-up email - Sélectionner -
	The report field is additional text to be included in a p reformatted self-mail.

CondoLogie

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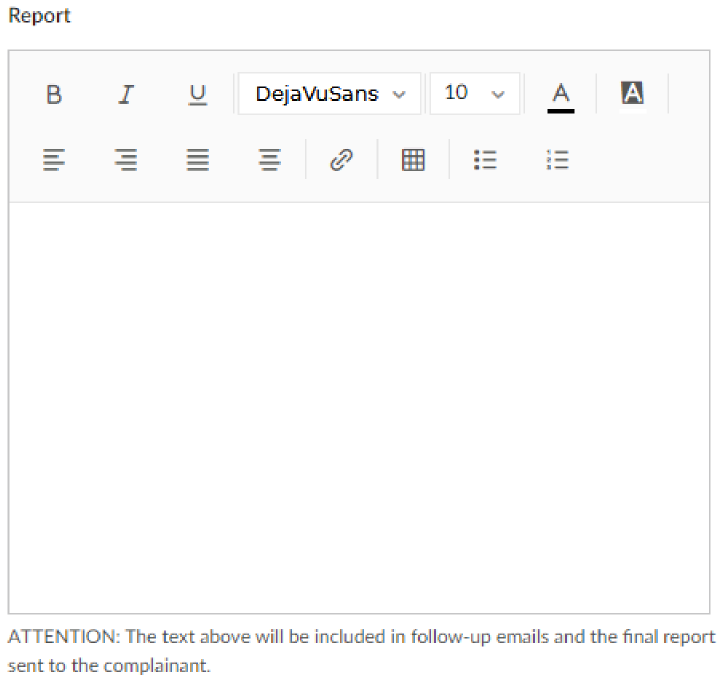
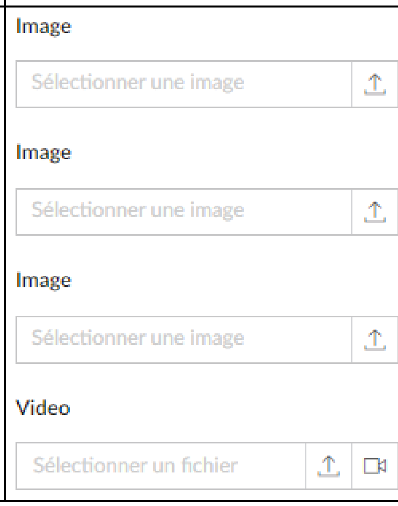
A full procedure manual for an administrative science application that does everything for the condominium!

2024v0117

	
These fields are intended to receive scanned photos and/or video to be uploaded.	

Confirmation of receipt of complaint.	**CondoLogy** An administrative science application that does everything for condominium ! Hello Mrs. Miss. Mr. ${Nom_complet}, **Your private unit;** ${Num_ro_d_unit} **Complaint status;** ${Statut_de_la_plainte} We confirm receipt of your complaint and we are doing our best to rectify the situation as soon as possible.

	You will receive by email one or more updates on all developments. Thank you and good day. **Your Board of Directors.** ${Copropri_t_administr_e}

Section; Procedures

The procedure section allows you to administer everything that is done to resolve a situation that has led to a complaint.

To access it from the report, go to **Complaints management** then, facing the complaint line to be administered, click on the three small green dots **...** then on **Edit.**

Complaint process

Enter Date hour of the procedure, the description. Register a company and the person responsible for the complaint.

If: The register does not contain a company that can help in the process of resolving the complaint, use a search engine to find a company. Once found, click on **+ Add new** to be able to complete the form and at the same time populate your register of entrepreneurs.

If: Following a procedure, it may be necessary to send a report to the complainant, here is how:

From the complaint file, adjust the to the right **Complaint Status, Send follow-up email** field to **Send follow-up email** of the complaint. Add a note in the **Report field** provided for this purpose so that the text is included in the self-email to be sent to the complainant.

Sample note: 2023-03-30 A person was dispatched to the scene to rectify the situation. We are waiting for the report.

Before the backup, complete a **Complaint process** to leave a trace of the follow-up carried out. Click **+ Add new**.

Once the form is completed, save it by clicking on;

Mettre à jour Annuler . A self-email containing the text of the **Report box** will be sent.

Complaint follow-up auto-email.	**CondoLogy** An administrative science application that does everything for condominium ! Hello ${Nom_complet}, **Your private unit;** ${Num_ro_d_unit} **Complaint status;** ${Statut_de_la_plainte} Here is an email containing a report from manager ${Gestionnaire_de_la_plainte}. **You submitted the following complaint;** ${SVP_Description_de_la_plainte} **and offered this solution;** ${Solution_souhait_e} **The text below is the note to file of what has been completed;** ${Rapport} Thank you and good day. **Your Board of Directors** ${Copropri_t_administr_e} Administered with CondoLogy.com - All rights reserved 2023

If: Following a process, it may be necessary to send a final report to the complainant, here is how:

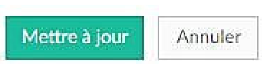
From the complaint file, adjust the **Send follow-up email field** to **Send final report to the complainant** of the complaint. On saving, an auto-email will be sent.

Before saving, complete a procedure to leave a trace of the follow-up carried out.

Self-email of the final complaint	**CondoLogy**

follow-up.	An administrative science application that does everything for condominium ! Hello ${Nom_complet}, **Your private unit;** ${Num_ro_d_unit} **Complaint status;** ${Statut_de_la_plainte} Here is an email containing a report from manager ${Gestionnaire_de_la_plainte}. **You submitted the following complaint;** ${SVP_Description_de_la_plainte} **and offered this solution;** ${Solution_souhait_e} **The text below is the note to file of what has been completed;** ${Rapport} Thank you and good day. **Your Board of Directors** ${Copropri_t_administr_e} Administered with CondoLogy.com - All rights reserved 2023

Once the form is completed, save it by clicking on;



. A self-email containing the text of the **Report** box will be sent.

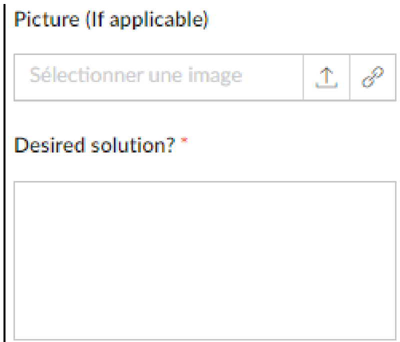
Section; Complaint Section (Form)

A complaint is created when the form is completed by the complainant or the complaint is received by email to an administrator. This section contains mandatory fields.

Field name	Description	Mandatory
Date-Time of the complaint	This is the date and time of the complaint	No
Full name *	This is the complainant's first and last name	Yes
Complainant's email *	This is the complainant's email address	Yes

Unit number	This is the complainant's unit number	Yes
Phone number *	This is the complainant's phone number	Yes
Mobile	This is the plaintiff's mobile number	Yes
Complaint about *	Select the subject of the complaint	Yes
Please Description of the complaint *	Complaint description text	Yes
Picture (If applicable)	Image describing the complaint	Suggested
Desired solution? *	Text describing the solution	Yes

From the form or if a complaint was made in writing, enter the date-time of the complaint.	Date-Time of the complaint yyyy-MM-dd HH:mm:ss
Full Name * Aucun / Prefix / First name / Last name Complainant's email *	From the form or if a complaint was made in writing, enter the complainant's full name and email address.
Unit number - Sélectionner -	From the form or if a complaint was made in writing, enter the complainant's unit number.
From the form or if a complaint has been made in writing, enter the complainant's telephone and/or mobile number.	Phone number * +1 506-234-5678 Mobile +1 506-234-5678
Complaint about * - Sélectionner - Please Description of complaint *	From the form or if a complaint was made in writing, enter the words and description of the complainant.
From the form or if a complaint has been made in writing, upload an image and enter the complainant's desired solution.	



Report; Complaint management

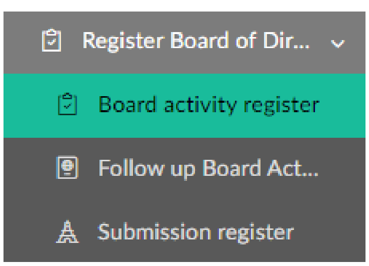
This is the report of all complaints which may have a different status depending on the evolution. The report is sorted by **Tracking Date-Time** in ascending order. To access the complaint file to be processed first. You can access the complaint form by clicking on the three small green dots **...** and then on **Edit.** It is always important to adjust the **Complaint Status** and the **Follow-up Date-Time** to ensure that the follow-up is up to date.

If; A self-email must be sent, choose the correct follow-up from the **Send follow-up email field** so that a self-email is sent to the complainant as shown above. Before saving, complete the procedure section in order to leave a trace of the follow-up carried out, then click on 

.

Form; Board activity register

In force.



This form makes it possible to record all the activities of the Board of directors and/or the meetings of the board.

It is also possible to communicate automatically via e-mail with the board of directors, a co-owner, all the co-owners and/or with a contractor or all the contractors, leaving a trace of the activity in the Register Board of Directors.

Note: **CondoLogy** can provide email communications for management if the condominium does not have a domain name with a personalized email system. It is preferable that the condominium have a personalized email for communication purposes rather than using the private email addresses of the administrators.

CondoLogy can help you set up a domain name (.com or .ca), a web page to include forms such as complaints for example or for emails from administrators.

Board activity register

Field name	Description	Mandatory
Description of the condominium	Select the condominium	Suggested
Activity performed by	Indicate the administrator	Yes - Search
Date-Time of the activity	Indicate the date and time of the activity	Yes
Activity status	Choose activity status	Suggested
Budget items	If the CA activity is related to a budget item, choose it	Suggested
Expense assumed by	How the expense is assumed is automatically displayed	Automatique
Adding the submission to the budget	Checkbox if the activity results in an expense not provided for in the budget	Yes
Activity category	Indicate the category of the activity	Yes
Activity Description	Simple activity description text	Yes
Time allocated to the activity	Indicate the time allocated to the activity	Suggested
Document of the activity	Upload and archive a document concerning the activity	No
Agenda	Uploaded and archived a document regarding the activity	No
Signature	Electronic signature of the administrator who performed the activity	Suggested

An administrative task without producing a document and/or sending an email.

Board activity is not always accompanied by the production and/or sending of documents. The task can be simply administrative.

Let's go!

Choose the condominium. Choose the administrator who runs the task. Enter the date-time of the administrator's activity or the future date for a follow-up. Choose the status of the activity.	Description of the condominium - Sélectionner - Activity performed by - Sélectionner - Date-Time of the activity yyyy-MM-dd HH:mm:ss Activity status - Sélectionner -
	If the CA activity is related to a budget item, choose it. How the expense will be assumed is displayed automatically.

Budget items - Sélectionner - Expense assumed by Item Type Adding the soumission to the budget	Expense Type is automatically displayed. The checkbox adds an expense to the budget if it was not budgeted.
Activity category - Sélectionner - Activity Descrition	Choose the activity category. Enter a description of the activity.
If necessary, enter the time allocated for the activity (possibly useful for statistics). Uploaded a scanned document related to the activity if necessary.	Time allocated to the activity HH:mm:ss Document of the activity Sélectionner un fichier
Signature Dessiner votre signature [Effacer]	It is possible for the administrator to add an electronic signature using the mouse.

If the fields in the **Board Activity Register section** are completed, you can register your activity by clicking on Soumettre Réinitialiser at the bottom of the page.

Section; Document production

An administration must certainly communicate with a multitude of contacts by email, telephone or even by text message.

What interests us here are email communications. **CondoLogy** can perform all of them and in some circumstances automate them; for meetings, internal communication and/or submissions.

The advantage of using **Condology** is traceability, that is, outgoing communications are recorded in an activity sheet in addition to completing the register, but this process does not replace a complete email system attached to a domain name (such as mycondo.com or .ca) so that all outgoing and incoming email communications remain on file at the board level.

The worst process is to use private email addresses such as Gmail, Hotmail and/or Outlook for example.

These systems are effective, but all email exchanges on private addresses do not produce an archive in the condominium management application and cause a breach of security and confidentiality since the emails remain in the hands of the mailboxes of the administrators who pass over time.

A solution can be expensive!

To have a professional system, you need:

- A domain name (mycondo.com or .ca for example)
- A landing web page or mini website
- Private email addresses attached to the domain name

Condology can do much more and help you in this direction, **get informed!**

Document Production section of the form allows you to produce and send emails that will be official documents.

- To obtain a model sheet **Click here**. From this web page, you can download templates for your communications, your Agenda, a Resolution and/or for a Minutes.
- Templates are also available in this procedure document
- It is possible to communicate directly with a co-owner.
- It is possible to communicate the agenda directly to all the co-owners or to the members of the Board of Directors.
- It is possible to communicate a Resolution and/or Minutes directly to all the co-owners or to the members of the Board of Directors.

CondoLogie

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A full procedure manual for an administrative science application that does everything for the condominium!

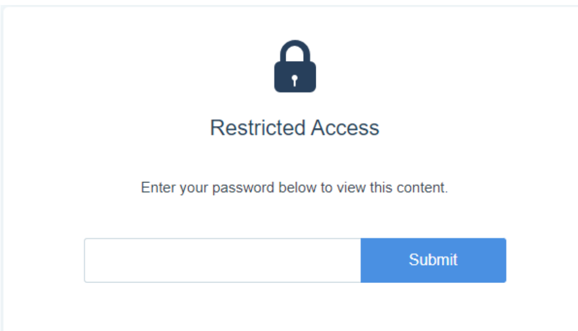
2024v0117

Models upgrade

If you prefer, use your current models or you can adapt the **CondoLogy models** to the reality of your condominium, here is how;

Go to the web page **CondoLogy models. Click** on the needed link.

Open the downloaded model. You will find that the model is protected by a Restricted Access.



The password is; **!Condo1**

Your system may show the documents at the bottom of your "browser" page or head to then

Accès rapide

Bureau

Téléchargements. Select, open the documents and click on Activer la modification...

You have arrived!

Adapt the models to the reality of your condominium by removing the gray frame **Warning...** Then modify the documents. Once done, save your changes in a proper file by clicking on at the top left of the page or save when closing the document.

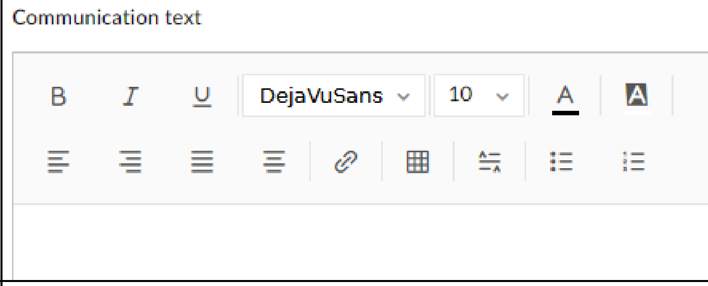
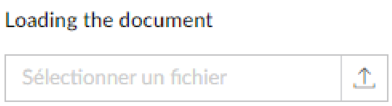
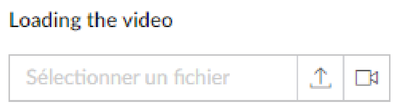
Bingo!

Document Production Section

Field name	Description	Mandatory
Schedule sending	Choose when to send	No
Communication Date-Time	Indicate the date and time of the communication	Suggested
Object	Enter the title of the subject of the email	Yes
Receipt by	Indicate for whom the document is intended	Yes
Co-owner's name	Choose the name of the co-owner to whom the auto-email is addressed	Yes

Telephone of the co-owner	Automatic registration of the co-owner's telephone number	Automatique
Co-owner's email	Automatic registration of the co-owner's email address	Automatique
Submission Deadline Date-Time	If it is a tender, enter the deadline for submitting a tender	Yes
Communication text	Text included in self-mail	Yes
Loading the document	Upload a scanned document if needed	Suggested
Loading the document	Upload a scanned document if needed	Suggested
Loading the document	Upload a scanned document if needed	Suggested
Loading the document	Upload a scanned document if needed	Suggested
Loading the document	Upload a scanned document if needed	Suggested
Loading a video	Upload a video if needed	Suggested

Choose when the sending should be made. If the sending is postdated, complete the Date-Time of the communication.	Schedule sending - Sélectionner -
Communication Date-Time yyyy-MM-dd HH:mm:ss	Enter the **Date-Time of the communication**. It is possible to postdate it by checking the box above.
Enter the title of the subject of the email.	Objet
Receipt by - Sélectionner -	Choose who the email is for.
Select the co-owner's name to get their phone and email address automatically loaded.	Co-owner's name - Sélectionner - Telephone of the co-owner +1 506-234-5678 Co-owner's email
Submission Deadline Date-Time yyyy-MM-dd HH:mm:ss	If it is a tender, enter the deadline for submitting a tender.

The space for the text of the communication will be included in the p reformatted self-email when the form is saved.	
	Five fields to upload a scanned document or photo to create an attachment to your auto-email.
Uploaded a video with a maximum duration of 1.5 minutes if necessary.	

Entrepreneur Bidders Section

The **Entrepreneur Bidders section** is for communications with contractors during a bid;

If: Field **Receipt by** is to **An entrepreneur,** only the first column of the bidder will be visible in order to be completed to communicate by email.

If: Field **Receipt by** is at **All entrepreneur,** the three columns of bidders will be visible in order to be completed to communicate simultaneously by email.

Choose the status of the submission (communication).

Field of research of an entrepreneur. It is possible to add an entrepreneur to the registry.

This field will be completed automatically.

This field will be completed automatically.

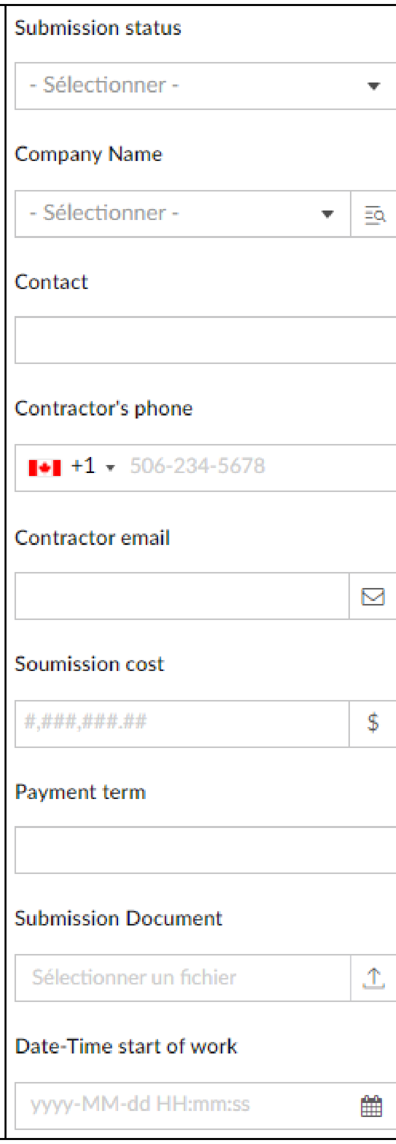
This field will be completed automatically.

Enter the bid amount.

This field will be completed automatically.

Uploaded the scanned document of the submission.

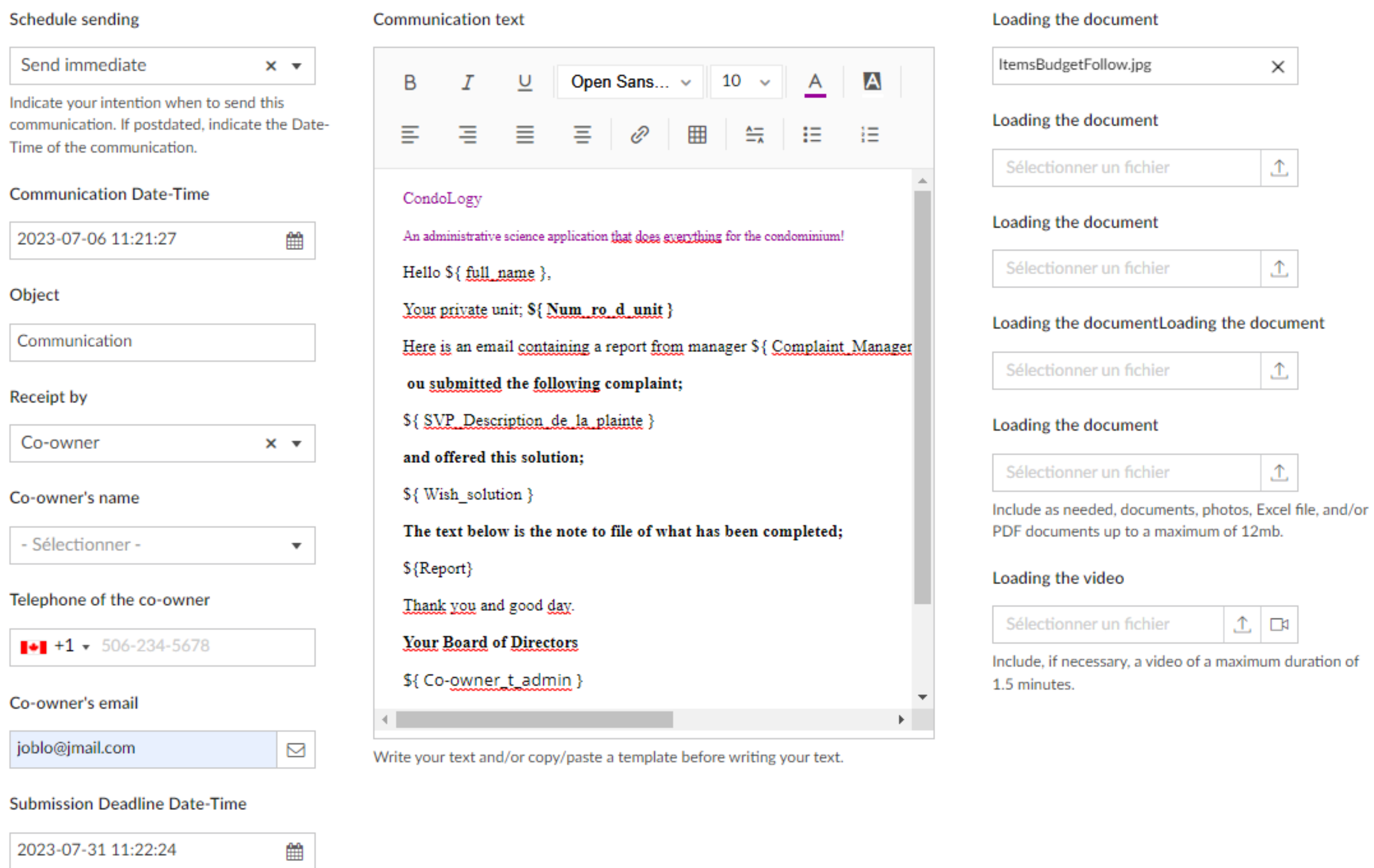
Indicate the Date-Hours of the start of the work.



A "Send immediate"

Here is the model of an immediate sent to a co-owner. The fields in the left column show the details of the communication. The center column is the content and the right column is the supporting documents to be sent as an attachment to the email.

It is possible to send immediately regardless of what the Receive by field displays.



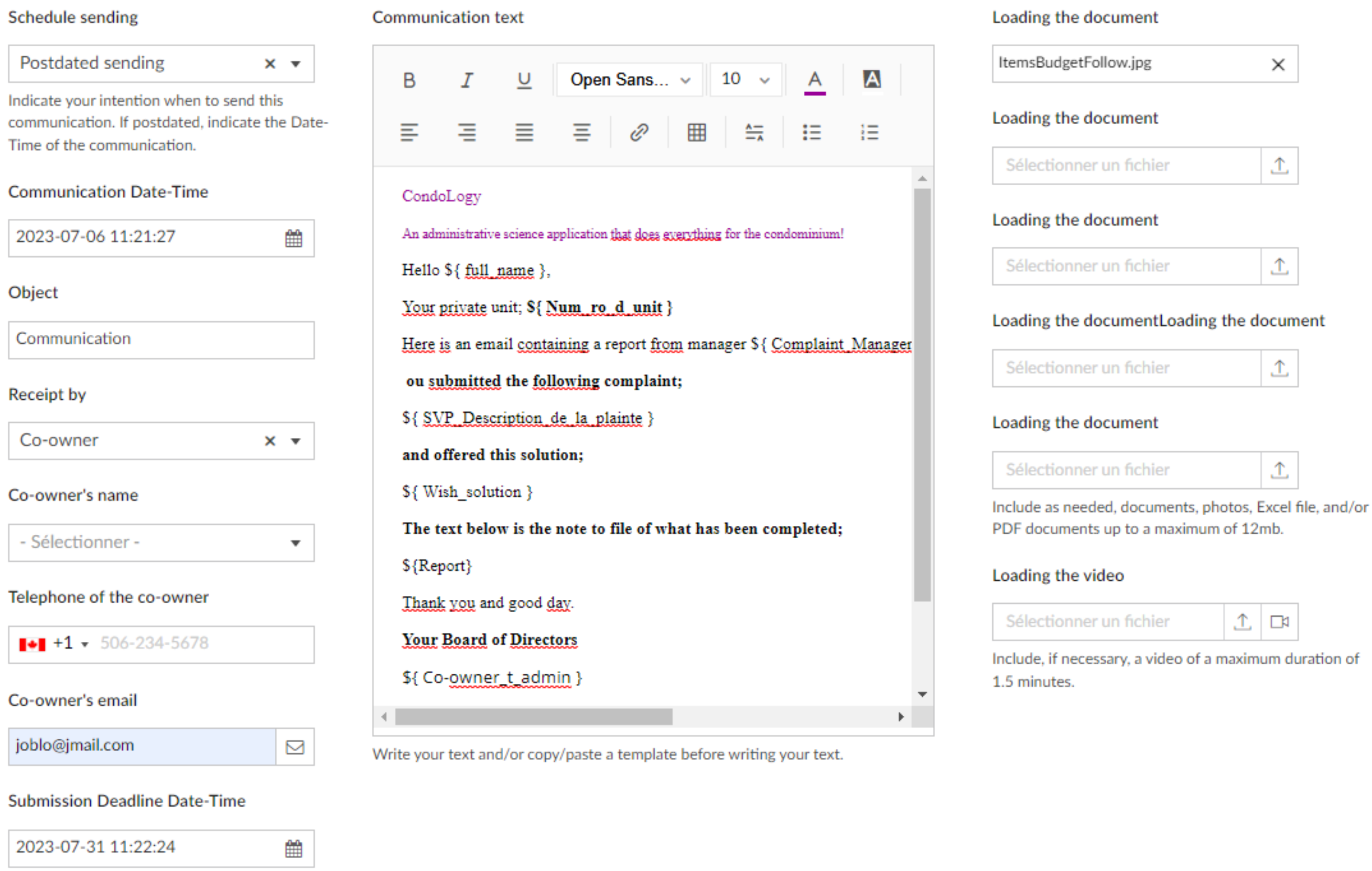
The email will be sent once the form has been saved when the green button Soumettre Réinitialiser or Mettre à jour Annuler is clicked if the **Schedule sending** field is **Send immediately.**

Postdated sending

Here is the template for a postdated mailing. The fields in the left column show the details of the communication.

The center column is the content and the right column is the supporting documents to be sent as an attachment to the email.

It is possible to send immediately regardless of what the Receive by field displays.



Schedule sending

Postdated sending

Indicate your intention when to send this communication. If postdated, indicate the Date-Time of the communication.

Communication Date-Time

2023-07-06 11:21:27

Object

Communication

Receipt by

Co-owner

Co-owner's name

- Sélectionner -

Telephone of the co-owner

+1 506-234-5678

Co-owner's email

joblo@jmail.com

Submission Deadline Date-Time

2023-07-31 11:22:24

Communication text

Open Sans... 10

CondoLogy

An administrative science application that does everything for the condominium!

Hello ${ full_name },

Your private unit; **${ Num_ro_d_unit }**

Here is an email containing a report from manager ${ Complaint_Manager

ou submitted the following complaint;

${ SVP_Description_de_la_plainte }

and offered this solution;

${ Wish_solution }

The text below is the note to file of what has been completed;

${Report}

Thank you and good day.

Your Board of Directors

${ Co-owner_t_admin }

Write your text and/or copy/paste a template before writing your text.

Loading the document

ItemsBudgetFollow.jpg

Loading the document

Sélectionner un fichier

Loading the document

Sélectionner un fichier

Loading the documentLoading the document

Sélectionner un fichier

Loading the document

Sélectionner un fichier

Include as needed, documents, photos, Excel file, and/or PDF documents up to a maximum of 12mb.

Loading the video

Sélectionner un fichier

Include, if necessary, a video of a maximum duration of 1.5 minutes.

The email will be sent once the form has been saved when the green button Soumettre Réinitialiser or Mettre à jour Annuler is clicked if the **Schedule sending** field is **Postdated sending** and the **Date-Time of the communication** indicated is in the future.

2024v0117

Communication model

Warning: This document is a model and not an original. Delete the text in the Gray frame if you use it for your administrative purposes and modify all the information for information purposes to adapt the document to the reality of your co-ownership.

CondoLogy 2023v0403
An administrative science application that does everything for the condominium!

Name of your union
Address
City, Province
ZIP code

Such; Telephone number of your union
E-mail; Syndicate email

board of directors **Year;** 2023

Object; Communication

Your text here

Good day

Your Board of Directors

Agenda template

Warning: This document is a model and not an original. Delete the text in the gray frame if you use it for your administrative purposes and modify all the information for information purposes to adapt the document to the reality of your co-ownership.

CondoLogy 2023v0403
An administrative science application that does everything for the condominium!

Name of your union
Address
City, Province
ZIP code

Such; Telephone number of your union
E-mail; Syndicate email

board of directors **Year;** 2023

CondoLogie

CondoLogy

A full procedure manual for an administrative science application that does everything for the condominium!

2024v0117

Object; Agenda

The board of directors is invited to a board meeting.

Dated; 2023-06-15

Place; Meeting room

Agenda;

1. Welcome word
2. Budget item
3. Miscellaneous

Prepare your questions in order to discuss them under point 3- Miscellaneous.

Your Board of Directors

Model of a summons

Warning: This document is a model and not an original. Delete the text in the gray frame if you use it for your administrative purposes and modify all the information for information purposes to adapt the document to the reality of your co-ownership.

CondoLogy 2023v0607
An administrative science application that does everything for the condominium!

Name of your union
Address
City, Province
ZIP code

Such; Telephone number of your union
E-mail; Syndicate email

Board of directors Year; 2023

Date & time: Monday, June 12, 2023
Locations: Virtual

Object; Invitation to a special Board meeting

1. Opening of the assembly

2. Adoption of pending minutes
3. Special assembly item
4. Miscellaneous
5. Closing of the meeting

Good day

Your Board of Directors

Model of a resolution

Warning: This document is a model and not an original. Delete the text in the gray frame if you use it for your administrative purposes and modify all the information for information purposes to adapt the document to the reality of your co-ownership.

CondoLogy 2023v0403
An administrative science application that does everything for the condominium!

Name of your union
Address
City, Province
ZIP code

Such; Telephone number of your union
E-mail; Syndicate email

Board of Directors Year; 2023

Object; Resolution of the Board of Directors

Dated; 2023-06-15

Place; Meeting room

It is resolved;

1. That;
2. That;
3. That

CondoLogie

CondoLogy

A full procedure manual for an administrative science application that does everything for the condominium!

2024v0117

Your Board of Directors

Model of a report

Warning: This document is a model and not an original. Delete the text in the gray frame if you use it for your administrative purposes and modify all the information for information purposes to adapt the document to the reality of your co-ownership.

CondoLogy 2023v0403
An administrative science application that does everything for the condominium!

Name of your union
Address
City, Province
ZIP code

Such; Telephone number of your union
E-mail; Syndicate email

board of directors **Year;** 2023

MINUTES

1st meeting
Thursday, March 13, 2023 held in the common room (room G56) and by video conference.

The meeting opens under the chairmanship of Mr. Jo Blo, Chairman of the Board. Mrs. Gina Loulou, Secretary General, acts as Secretary.

The following members are present:

The following members have apologized:

The participants of the meeting:

The President welcomes the members of the Board of Directors and a new member of the Board, Mr. Titi Jo.

CA-2023-03-13-01
Adoption of the agenda: On regular proposal and unanimously, the board of directors adopts the agenda as it was transmitted to the members of the board.

CA-2023-03-13-02

CA-2023-03-13-03

CondoLogie

CondoLogy

A full procedure manual for an administrative science application that does everything for the condominium!

2024v0117

CA-2023-03-13-04

CA-2023-03-13-05

CA-2023-03-13-06
Date of the next meeting: In accordance with the schedule of meetings scheduled for the 2022-2023 academic year, the Board of Directors sets the next meeting for Monday, September 20, 2023, subject to modification by the President if circumstances so require. In addition, as announced at this meeting, a special meeting of the Board of Directors will be held on August 30, 2023 at 9:00 a.m.

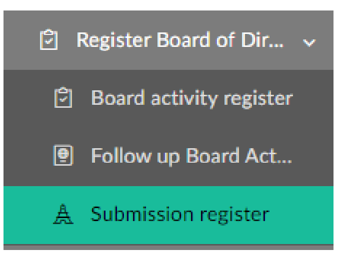
CA-2023-03-13-07
Closing of the meeting: On regular proposal and unanimously, the Board of Directors ends its meeting. Confirmed at the meeting of September 20, 2023.

CA-2023-03-13-08
Adoption: At the next meeting of the Board of Directors, these minutes may be adopted after reading.

Your Board of Directors

All other models can be used.

How to produce a submission



The submissions section is vital to the maintenance of the building. This section within the Board Activities Register form is highly automated and helps administrators track submissions of work that is urgent in the short, medium or long term.

When the register of entrepreneur is well stocked and diversified, producing quotes is a charm with **CondoLogy.**

The submission may be in preparation for several stages before being sent. Just make sure that the **Date-Time of the activity** is set when continuing your submission in order to track it from the **Submission Log.**

The application can communicate a quote automatically to bidders by providing details of the need for the work to be done and include a report in Word, PDF, photos and/or video format if necessary. On the other hand, it is a question of obtaining the email of a contact at the bidders in order to automatically communicate a bid by email via the **Entrepreneur Bidders section.**

By consulting the website of a potential contractor who can carry out work on the condominium, you may have to contact them by their web forms or by telephone in order to obtain as much information as possible to complete their records in the **Register of entrepreneurs.**

It is suggested to complete the register of entrepreneurs with as much detail as possible, especially at the level of a contact's email address. If necessary, contact him to find out beforehand if the entrepreneur is interested in being part of your register.

This section is for producing a quote. It features field automation's to complete and/or communicate the submission.

If; the repair, replacement and/or works quote is not budgeted, a budget item can be created a little later without changing the current budget.

Create the submission

The submission section can be used for a single entrepreneur, two or for the three spaces provided for this purpose. You can access a submission form by clicking to the left of the form on the three small green dots **...** then on **Edit** or + at the top right of the page to obtain a blank form.

From section **Board Activity Register Log, complete the fields in the section and use the Activity Date-Time** field to track the submission.

From section **Document production**, complete the fields in the left column to indicate when the submission must be sent **Schedule sending** then **Communication Date-Time.** Then, indicate its **Object** (suggested to enter the word Submission) and by whom it will be received by placing the field **Receipt by** to **An entrepreneur or All entrepreneurs.**

Indicate the due date to bid with the field **Submission Deadline Date-Time** (Allow a reasonable time to produce a submission. Certain contractors, depending on the submission, will contact you to examine the work to be done on site).

Enter your submission template in the **Communication text** or use the **CondoLogy template** here below. Complete the model with as much reality and detail as possible, add photos and/or a video as needed Then in the right column, upload documents, photos and/or video associated with the submission, respecting the capacity of the system.

From section **Entrepreneurs Bidders,** you see only three columns of bidders that are accessible. A column is = to a bidder.

Let's go!

Use the **Submission Status** field to determine how the submission will be routed to the Entrepreneur bidder.

Company Name field to choose a bidder;

If; the bidder is listed in the **Company Name** field, the bidder information will be entered automatically.

If; the tenderer is not part of the list of the field **Company name,** it will be necessary to carry out a search by clicking on Company Name - Sélectionner - the section in highlighted yellow. If the search produces nothing, click on **+ Add new**, a window will open to complete the information of the new bidder.

Use the means of search engines to fill your **Register of entrepreneurs**;

- Google, Ping. yahoo
- Yellow Pages
- Find a contractor Powered by APCHQ

There are also websites for requesting quotes;

- RenoAssistance
- Go submission

If you use these links be sure to do your research carefully. CondoLogy does not suggest any contractor and the user is entirely responsible for these choices.

Once the contractor information is completed, click Soumettre Réinitialiser. The information will add a record to the **Register of entrepreneurs** and display in the Bidder column.

The submission may be in preparation for several stages before being sent. Just make sure that the **Date-Time of the activity** is set when continuing your submission in order to track it from the **Submission Register.**

Once the form is completed, click on Mettre à jour Annuler for the submission to be saved.

Send a quote

To send a quote, it is important that these fields are completed.

If; the shipment is immediate, set the **Schedule sending** field to **Send Immediate**. For information, place the **Communication Date-Time** at the time of sending. The field **Receipt by** must be at **All entrepreneurs**.

If; the shipment is postdated, set the **Schedule sending** field to **Postdated sending** . Set the **Communication Date-Time** to the future moment of the sending. The field **Receipt by** must be at **All entrepreneurs**.

Be sure to check the box; Send communication

Once the form is completed, click on Mettre à jour Annuler for the submission to be sent.

Template for submission

Warning: This document is a model and not an original. Delete the text in the gray frame if you use it for your administrative purposes and modify all the information for information purposes to adapt the document to the reality of your co-ownership.

CondoLogy 2023v0316
An administrative science application that does everything for the condominium!

Bidding document

Identification of the condominium
Name of your union
Address
City, Province
ZIP code

Such; Telephone number of your union
E-mail; Syndicate email

Location of work;

Work requiring a permit;

Deadline date-time for bidding;

Work description

Please indicate in your submission

- Name of your company & name of the project manager
- Full address, phone & email
- RBQ No.
- The Contractor confirms that he holds adequate civil liability insurance for the execution of the work

provided for in the contract and that this insurance covers the subcontractors and the Client.

- Insurance Company & Policy No.
- List of sub-contractors
- Timeline
- Stage of works
- Payment method
- Bid Work Cost
- GST and QST number
- Commitment to guarantees for materials, manufacturers and work
- Declaration of work safety
- Terms of termination; In accordance with the Civil Code, the Contractor may only terminate the contract unilaterally for a serious reason and he may not do so at an inappropriate time. He must then return the sums collected from the Customer for work not carried out. The Customer may unilaterally terminate the contract at any time, even if the work has started. On the other hand, he must pay the Contractor the value of the work carried out before the end of the contract or before notification of the termination, as well as the value of the goods which have been handed over to him and which are usable. Each of the parties may be held liable for the damage suffered by the other (articles 2125, 2126 and 2129 of the Civil Code
- Space for end of signature

Thank you for your interest in producing a quote.

____

Member of the Board of Directors

If; **Submission status** is at **Sent by Website**, a bidder web form will need to be completed from the bidding company's website, follow their process. It is important to produce a submission document such as the template in order to upload it to a web form. Several websites have this upload function.

If; the **Submission status** is to **Make a call,** you will have to contact the contractor by telephone to explain your need and, if necessary, obtain an appointment on site. It is certain that nowadays everyone has at least one email address.

Management of a submitted submission

A reminder is sent by email 5 days before the **Submission Deadline Date-Time** . The follow-up of submissions is automated, but nothing prevents the administration from contacting a contractor near the **Submission Deadline Date-Time** of tenderers who have not responded.

To consult the file of a submission, click on the three small green dots **...** then on **Edit.**

Update information. To save the information, click on Mettre à jour Annuler.

Receipt of a submission

When a submission is received, go to the **Submission Register** and then to the submission line. To consult the file of a submission, click on the three small green dots **...** then on **Edit.**

Head to the **Entrepreneur Bidders** section and on the bidding contractor column. From its submission, transfer critical information to the corresponding fields. Then, upload the document received in Word or PDF format in the **Document submission 1, 2 or 3** field of the corresponding column.

Edit the **Submission Status** and set the status to **Received.**

To update the changed information, click Mettre à jour Annuler. An acknowledgement of receipt will be emailed to entrepreneur whose bid has been received. The **Submission Status** will automatically change to; **Under review**.

Grant a quote

A Submission is granted at a meeting of the board of directors when the date of the submission has passed and/or all the submissions have been received. A submission is accepted when conditions such as price, time for completion of the work and/or the contractor's quality guarantee meet the criteria of the board of directors.

When a bidder is successful, change that bid column from **Submission Status** to **Retained**. Change the **Submission Status** to **Rejected** in the other columns when a submission is unsuccessful. Only one entrepreneur must be selected. Set **Activity Status** to **Submission accorded.**

The **Submission Deadline Date-Time** that was used for the receipt of tenders is now used for the scheduled end date of the work. Then placed the **Date-Time of the activity** on the date of a follow-up or on the date of the start of the work.

To update the changed information, click Mettre à jour Annuler. An acknowledgement of receipt will be sent by email to entrepreneurs whose bid has been accepted and rejected.

Submission Canceled

Instead of deleting a submission, cancel it. This can be used by the Board of Directors for statistical purposes.

Set **Activity Status** to **Cancel.**

To update the changed information, click Mettre à jour Annuler.

Submission to create an unforeseen expense

Urgent works must be carried out with the aim of safeguarding the common good;

If; The decision and ability to pay the unforeseen expense of the bid from the **Petty Cash Budget Item**, does not convert your submission into a **Budget Item.**

Go to the **Budget Items report** form, then to the **Administration & finance** category and to the description of the **Petty cash item**.

Open the form by clicking on the three small green dots **...** and then on **Edit.** Go to the **Breakdown of payments** section and add the expense if the **Balance payable** field allows it.

To update the changed information, click Mettre à jour Annuler.

If; The decision and ability to pay the unforeseen expense of the bid from **Petty Cash Budget Item** is not possible, convert your submission into **Budget Item** if this expense is unplanned in the current budget.

Note: It is possible to create a **Budget Item** whose **Expense assumed by** is **By a special contribution** without using the submission process. The Item Category should be set to **Unforeseen** and **the Item Type** to **Unexpected.** This means that the amount of the current budget will not be changed.

For the submission to create an expense in the **Budget Items form**, certain conditions must be in place. The check box ☐ Adding the soumission to the budget must be checked and the **Activity status** must be **Submission completed (This status is placed at Submission completed when the Board of Directors has chosen the entrepreneur who will carry out the work)** .

A budget item will be added automatically in the **Budget Items Report form** and the category of the item will be automatically set to **Unexpected** as well as **the Type of the item** will be automatically set to **Unforeseen expense,** which makes the budget amount current will not be changed.

Make sure that the **Expense assumed by** field is entered according to the financing method chosen (Contingency fund or by a special contribution). It is the **Cost of the submission** of the **Status of the submission** which is **withholding** which will be the amount of the unforeseen expense.

To update the changed information, click Mettre à jour Annuler.

Go to the **Budget Items Report** form, then to the **Unexpected category**. To access the file, click on the three small green dots **...** then on **Edit** .

Some fields need to be adjusted for the proper functioning and management of this expense in this budget.

Once the fields have been updated and to update the changed information, click Mettre à jour Annuler.

Contingencies

An unforeseen event cannot modify the established budget for which the co-owners have been invoiced for their common charges (condo fees). But contingencies must however be financed by:

1- By the PCF provident fund;

If; the **Items of the budget** does not exist during the production of the submission, the item, even using the advanced search engine does not appear in the list or does not give any result. Or, if the item is found by the search engine, it displays nothing in the **Expense assumed by** field and displays **Item unused in the Type of item** field, the item should not be paid for by the fund contingency since no amount has been added to or provided for in the PCF to pay for this expense.

In this case, the expense should be paid by a special assessment or if the fund limit is sufficient, use the **Petty cash budget item**.

If; the expense existed but was not foreseen, it could be paid by the contingency fund. However, the transfer to the contingency fund caused by this budget item probably does not cover the unforeseen expense. You ensure the ability to cover the unforeseen expenses by the contingency fund.

Next budget increase as needed to increase the potential for surplus money to eventually be allocated to the contingency fund. You refer to the Civil Code of Quebec or to your Deed of Co-ownership.

2- By a special contribution; Always unpleasant, but mandatory when a budget or contingency fund cannot absorb an unexpected expense. Start the procedure for the next special contribution;

You ensure that the unforeseen expense is financed by a special contribution. You go to the **Budget Items form** and then to **Budget Item Report** . Select the unforeseen expense by clicking on the three small green dots **...** then on **Edit.**

You head to the field **Expense assumed by** and ensure that the expense is covered **By a special contribution.** Once the fields have been updated and to update the changed information, click Mettre à jour Annuler.

Go to the **Register of condominium form** and then to the **Follow-up & Special contribution** report. Each of the private units are displayed.

Edit

Select the first check box to select all private units and then click **Edit.**

In the search bar, start entering the name of the field you want to mass modify, × Payment deadline then click on the search result highlighted in green, indicate the deadline for payment of the special contribution, then on Appliquer. Are you sure? the answer is **yes.**

Automatically the fields will be filled with the information of the special contribution!

Edit

Checked the columns to make sure the information matches what you are contributing. Select then click the button Auto E-mail special contribution. The auto-email will be sent to the co-owners and, if applicable, to the agent of the private unit.

Edit

Then select click **Edit.** In the search bar, start entering the name of the field you want to mass modify, × Special contribution status then click on the search result highlighted in green, indicate the

Special contribution status

Sent

special contribution, then on Appliquer, then confirm by clicking on **Yes.**

Urgent; Go to the **Report budget item,** then to the **Contingency category**, then to the budget item that initiated the special contribution. Click on the three little green dots ... then on **Edit**. Change the **Expense paid by field** to **Special contribution charged.** Save the file by clicking on Mettre à jour.

Notice of special assessment	**CondoLogy** An administrative science application that does everything for the condominium ! Hello ${Pr_nom_et_Nom_copropri_taire_1}, ${Pr_nom_et_Nom_copropri_taire_2} et/ou ${Mandataire_au_dossier}. Following an unforeseen expense not planned in the budget, your board of directors has no

choice but to produce a notice of special assessment calculated according to your share.

The item is not in the budget and therefore the item did not produce through the contributions of the co-owners a cash addition to the provident fund or the level of the provident fund is too low and below what we should have in cash.

Here are the details of the special contribution

Subscription total: ${Total_cotisation_sp_ciale}$
Description of contribution: ${Description}

Your share: ${Quote_part}%
Your special contribution: ${Cotisation_sp_ciale_unit_privative}$
Deadline to contribute: ${Date_butoir_du_paiement}

Thank you for your comprehension and have a nice day!

Your Board of Directors
${Copropri_t_administr_e}

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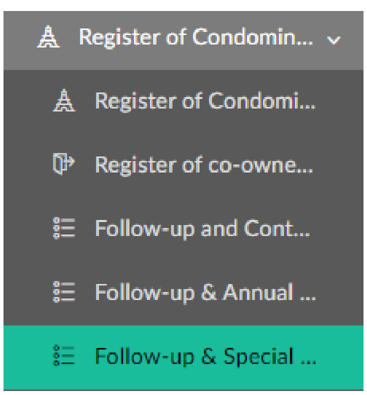
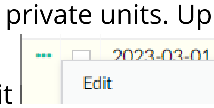
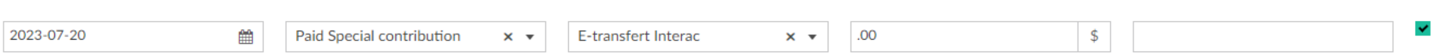
Monitoring of the payment of special contributions



From the **Register of Condominium form, Follow-up & special contribution** report.

The displayed report shows each of the private units. Upon receipt of a payment, access the payer's file by clicking on the three small green dots of the unit 

and then on **Edit.** Scroll down to the **Breakdown of transactions** section, click on **+ Add New.** Complete the fields of the line;



in order to complete the payment, then confirm the transaction by checking the box with checked . Scroll down again to the **Contribution** section and modify the **Special contribution status** to **Payment received**.

Then click on Mettre à jour Annuler .
Completely to the right of the line of the private unit whose payment of the special contribution has been received, click on Contribution received . The acknowledgement below will be sent by auto-email.

If; Payment of the special contribution is received, an acknowledgment of receipt can be sent	**CondoLogy** An administrative science application that does everything for the condominium ! Hello ${Pr_nom_et_Nom_copropri_taire_1}, ${Pr_nom_et_Nom_copropri_taire_2} and/or ${Mandataire_au_dossier}. Here is an acknowledgement of receipt of payment of your special contribution. Here are the details of the special contribution **Total special contribution:** ${Total_cotisation_sp_ciale}$ **Description of contribution:** ${Description} **Your share:** ${Quote_part}% **Your special contribution:** ${Cotisation_sp_ciale_unit_privative} **Deadline to contribute:** ${Date_butoir_du_paiement} Regards **Your Board of Directors** ${Copropri_t_administr_e} Administered with CondoLogy.com 2023 - All Rights Reserved

Automated follow-ups

Self-email template

The administrator who performed the instructions above has sent a self-email containing the details of the special contribution.	**CondoLogy** An administrative science application that does everything for the condominium ! Hello ${Pr_nom_et_Nom_copropri_taire_1}, ${Pr_nom_et_Nom_copropri_taire_2} et/ou ${Mandataire_au_dossier}.

	Following an unforeseen expense not planned in the budget, your board of directors has no choice but to produce a notice of special assessment calculated according to your share. The item is not in the budget and therefore the item did not produce through the contributions of the co-owners a cash addition to the provident fund or the level of the provident fund is too low and below what we should have in cash. Here are the details of the special contribution **Subscription total:** ${Total_cotisation_sp_ciale}$ **Description of contribution:** ${Description} **Your share:** ${Quote_part}% **Your special contribution:** ${Cotisation_sp_ciale_unit_privative}$ **Deadline to contribute:** ${Date_butoir_du_paiement} Thank you for your comprehension and have a nice day! **Your Board of Directors** ${Copropri_t_administr_e} Administered with CondoLogy.com 2023 - All Rights Reserved
Follow-up 1; 10 days before the payment deadline, an auto-reminder email will be sent.	**CondoLogy** An administrative science application that does everything for the condominium ! Hello ${Pr_nom_et_Nom_copropri_taire_1} ${Pr_nom_et_Nom_copropri_taire_2} ${Pr_nom_et_nom_du_mandataire} **Reminder** This automatic email is to inform you that the Board of Directors has not received your payment to cover your special contribution. **The deadline for making your payment is:** le ${Date_butoir_du_paiement} Please make your payment promptly! **Your Board of Directors** ${Copropri_t_administr_e} Administered with CondoLogy.com 2023 - All Rights Reserved
Final reminder; on the day of the payment deadline, an auto-email	**CondoLogy** An administrative science application that does everything for the condominium !

will be sent.	Hello${Pr_nom_et_Nom_copropri_taire_1} ${Pr_nom_et_Nom_copropri_taire_2} ${Pr_nom_et_nom_du_mandataire} **Final reminder** This automatic email is to inform you that the Board of Directors has not received your payment to cover your special contribution. **The deadline for making your payment is:** ${Date_butoir_du_paiement} Thank you for making your payment today! **Your Board of Directors** ${Copropri_t_administr_e} Administered with CondoLogy.com 2023 - All Rights Reserved

Follow-up 3; on the day of the payment deadline, the special contribution status will be increased to **Perception.**

From this moment, the administration will have to take charge manually of the collection of the payment of the special contribution by using the **Reminder date** for an effective follow-up of the legal procedures that the board of directors will deem appropriate.

Release a special contribution

When the process of a special assessment is completed, that is to say that all the assessments have been received and cashed and that the work is completed. Direct in **Register Board of Director form**, it is important to set the **Activity Status** to **Submission Completed.**

If a special assessment form has been completed, be sure to set the **Activity Category field** to **Special Assessment**.

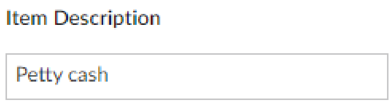
To save the file, click on Mettre à jour .

Go to the **Register of Condominium** and then to the tab Follow-up & Special ... in order to;

Release fields

Select the private units by checking the box Edit then click on **Edit.** Perform a search to select the fields associated with the **Special contribution status**. Leave the blanks and click **Apply.**

3- Through the Petty Cash budget item, one of the budget items created by default is named



.

This item is very important since it is always certain that an unforeseen expense may occur during the year of operation and/or simply have forgotten to add an item to the budget. At the next change of year of operation, it will be important to consult the list of expenses assumed by the **Petty Cash** in order to create one or more items for the next budget, if necessary. Determine an amount and enter it in the **Annual cost field.**

Make sure that the **Expenditure covered by field** is entered according to the financing method chosen (Provident fund, By a special contribution or by Petty cash).

Signing and voting

Never replaces an original signature on a document and/or an electronic signature producing a report of audit of the signature.

Field name	Description	Mandatory
First name-Last name 1	Indicate the administrator	Yes
Title 1	Indicate the date and time of the activity	Yes
Vote	Indicate the category of the activity	Yes
	and so on...	

First name - Last name 1	Title 1	Vote
- Sélectionner -		- Sélectionner -
First name - Last name 2	Title 2	Vote 2
- Sélectionner -		- Sélectionner -
First name - Last name 3	Title 3	Vote 3
- Sélectionner -		- Sélectionner -
First name - Last name 4	Title 4	Vote 4
- Sélectionner -		- Sélectionner -
First name - Last name 5	Title 5	Vote 5
- Sélectionner -		- Sélectionner -
First name - Last name 6	Title 6	Vote 6
- Sélectionner -		- Sélectionner -

If the activity of the **Board of Directors** requires a vote, these fields are intended for the registration of the 6 directors. The recording of votes **never** replaces an original signature on a document and/or an electronic signature producing a signature audit report.

Register Board of Director activity

In force.

This report shows in ascending order the activity of the **Board of Directors.** To consult a sheet of the report, click on the three green dots ... then on **Edit.**

Once you have made the necessary changes to the form, save your changes by clicking on Mettre à jour Annuler .

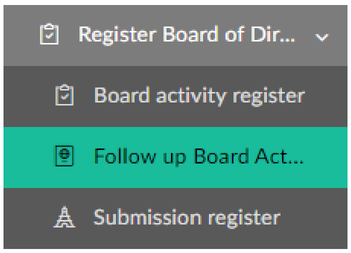
To perform a search, click on the column title written in bold. Then on Search, a column opens on the right of the page. Make your choice then click on Recherche	

This report can be modified, printed and/or exported.

Chargement du document	Chargement du document	Chargement du document	Chargement du document

In addition, completely to the right of the line of titles, you have hypertext links to consult the archived documents.

Follow up Board Activity Log



This **Follow up Board Activity Log** is by default classified by **Date-Time of the activity** in descending order. From the date most in the future or most recent in the past.

The detail of your follow-up is displayed in the **Activity Description** column in the center. To the right of the line are the links for accessing the documents.

To access the file, click on the three small greens **...** then on **Edit.**

This report is **very interesting** since it offers administrators the possibility of creating a work schedule over time and also of dividing the known administrative tasks between the administrators since from the first columns of the report is found;

Follow up Board Activity Log *

Date-Time of the act...	Activity code	Activity status	Activity performed by	Activity category	Activity Description
2023-06-19 11:20:36	10	Soumission accorded		Soumission	Modification de l'éclairage aires commune intérieure.
2023-06-12 16:18:19	7	To do		Board of Directors special Assembly	Recouvrement de créance
2023-06-12 10:51:27	9	To do		Board of Directors Assembly	
	3	Submission in preparation		Soumission	Aide comptable
	4	Submission in preparation		Soumission	Ascenceur & fosse
	5	Submission in preparation		Soumission	Assurance de dommage
	6	Submission in preparation		Soumission	Systeme d'arrosage automatique

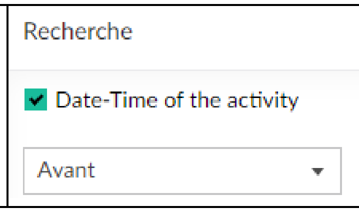
Once you have made the necessary changes to the form, save your changes by clicking on Mettre à jour Annuler.

Tip: If several cards are taking up so much of the first rank of the report that you are forced to search, follow these steps:

Go to the right of the form then click on 🔍. Check the Date-Time box of the activity then choose the **Before**

mode and enter the date of tomorrow then, click on 

.

This how-to displays tasks due today!	

Submission register

This register only displays records whose **Activity Category** is == to **Submission.**

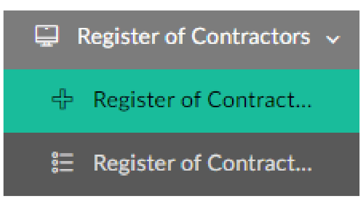
To access the file, click on the three small greens **...** then on **Edit.**

Once you have made the necessary changes to the form, save your changes by clicking on 

.

Form; Register of Entrepreneurs

In force.



A very important form to save time and money. The fairer the contractor's assessment, the fairer contractors will be able to respond to future bids.

Essentials are registered by default, you can keep them, modify them and/or delete them.

Field name	Description	Mandatory
Company Name	Indicate the legally used name of the company	Yes
Type of company	Define the type of business	Yes
Address	Set business address	Suggested
Account number	Indicate your account number	Suggested
Payment term	Indicate if a payment term is negotiated	Suggested
Website	Indicate the URL of the company's website	Suggested
Costumer portal	Indicate the URL of the company's customer area	Suggested
Social Network URL	Indicate the URL of a social network of the company	Suggested
Contact	Indicate the contact of the company	Yes
Phone	Indicate the telephone number of the contact of the company	Yes
Mobile	Indicate the company contact's mobile number	Suggested
E-mail	Indicate the email of the company contact	Yes

Contact	Indicate the contact of the company	Yes
Phone	Indicate the telephone number of the contact of the company	Yes
Mobile	Indicate the company contact's mobile number	Suggested
E-mail	Indicate the email of the company contact	Yes
RBQ License	Indicate the license number if possible	Suggested
OPC	Indicate the license number if possible	Suggested
APCHQ	Indicate the license number if possible	Suggested
Web evaluation	Register the evaluation made on the Internet	Suggested

Enter the company name. Choose the type of business. If necessary, add a business type from the OTHER type.	Company Name Type of company - Sélectionner -
Address Address Line 1 City / District State / Province Postal Code	Enter the full mailing address of the business.
Enter the account number if an account is open. If a payment term is negotiated with the company, add it.	Account number Payment term - Sélectionner -
Website https:// Customer portal https:// Social Network URL https://	Indicate the URL of the company's website, customer area and social network.

If you have direct contact with a company representative, indicate this with these phone numbers. Enter their email address.	Contact Phone +1 506-234-5678 Mobile +1 506-234-5678 E-mail
Contact Phone +1 506-234-5678 Mobile +1 506-234-5678 E-mail	If you have a second direct contact with a representative of the company, indicate it with these phone numbers. Enter their email address.
RBQ Licence OPC APCHQ Web evaluation - Sélectionner -	Indicate the company's RBQ number, if applicable. Indicate, if applicable, the OPC (Consumer Protection Office) number of the company. Indicate the company's APCHQ number, if applicable. Enter the evaluation found on the Internet.

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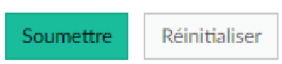
Terms of service

Each contractor may have service call charges. It is also valid to know the price.

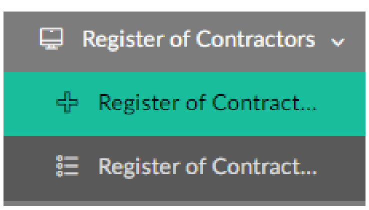
Field name	Description	Mandatory
Service call	Add information obtained from the website on certain travel expenses	Suggested
Rate	Add information obtained from the website on certain fares when travelling	No
Verifiable reference	Add verifiable references on work performed	Suggested

Indicate any useful notes on the pricing and miscellaneous costs of the company as well as verifiable references

Complete the fields then click on 

.

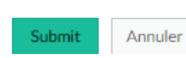
Register entrepreneur Report



The Syndicate register is the detailed registration of the syndicates in relation to each other called at CondoLogy Syndicate.

The treatment of Syndicates affiliated and/or in relation to the main condominium receive, like the co-owners, their annual dues which can be paid according to different methods.

To access the file, click on the three small greens **...** then on **Edit.**

Once you have made the necessary changes to the form, save your changes by clicking on 

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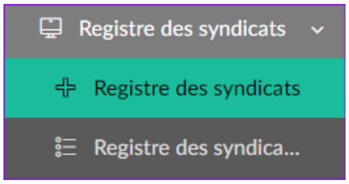
2024v0117

Rapport; Register of Syndicates

In force.



The register of Syndicate is the detailed registration of the syndicates in relation to each other called by CondoLogy Syndicate.

The treatment of the Syndicates affiliated and/or in relation to the main condominium receive, like the co-owners, their annual contribution.

Each Affiliated Syndicate receives dues based on a redistribution of common charges according to the list of **Budget Items.**

If the application is used for a secondary administration of a syndicate and a main syndicate takes responsibility for the expenses and redistributes them, a budget item named by default serves this situation. The budget item has as **Item category*** the name Come from main Syndicate.

Syndicate Details

Field name	Description	Mandatory
Principal condominium	Choose the main condominium	Suggested
Start year of administration	Date of the beginning of the administrative year	Yes
End of year of administration	Administrative year end date	Yes
Year of administration	The current year of administration	Yes
Name of the administrator in charge	Indicate the administrator in charge of the syndicate	Yes
Syndicate name*	Indicate the name of the condominium	Yes
Address	Indicate the address of the syndicate	Suggested
Phone	Indicate the telephone number of the condominium	Suggested
Email	Indicate the condominium email address	Yes
Deed of condominium	Upload the syndicate's deed of co-ownership	Suggested
Publication date	Enter the date of publication	Suggested
Act publication number	Enter the publication number	Suggested
Building plan	Upload condominium building plan	Suggested
Certificate of location	Uploaded the certificate of location	Suggested
Provincial Government number	Enter the province business number	Suggested
Government URL	Enter the URL of the Government site	Suggested
Federal business number	Enter the federal government business number	Suggested
Federal Government URL	Enter the URL of the Federal Government site	Suggested

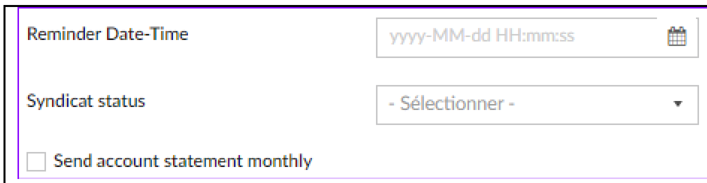
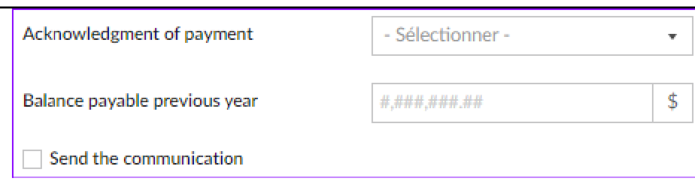
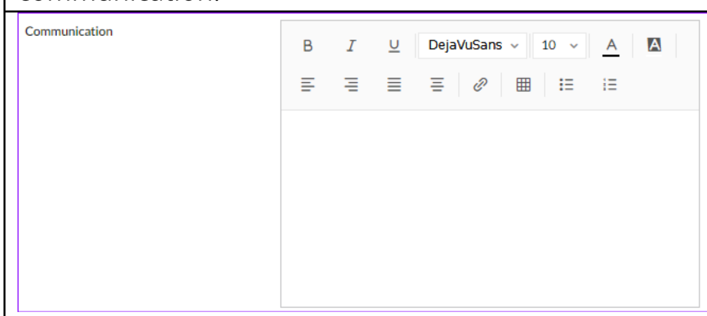
Principal condominium: - Sélectionner - Start year of administration: yyyy-MM-dd End of year of administration: yyyy-MM-dd Year of administration: #######	Indicate the principal condominium. Indicate the start date of the administration year. Indicate the end date of the year of administration. Indicate the current year of administration.
Indicate the name of the main administrator in charge of the syndicate.	Name of the administrator in charge: First Name / Last Name
Syndicate name * Address: Address Line 1; Address Line 2; City / District; State / Province; Postal Code; Country (- Sélectio...)	Indicate the name of the union. Indicate the address.
Indicate the telephone. Indicate the cell phone. Indicate the email.	Phone: +1 506-234-5678 Mobile: +1 506-234-5678 Email *
Deed of condominium: Sélectionner un fichier Publication date: yyyy-MM-dd Act publication number Building plan: Sélectionner un fichier Certificate of location: Sélectionner un fichier	Upload or enter legal information related to the syndicate.

Syndicate management

This section is used for the management of the condominium for communications or for monitoring dues.

Field name	Description	Mandatory
Reminder Date-Time	Indicate the date and time of reminder	Yes
Condominium status	Indicate the management status of the syndicate	Yes

Send account statement monthly	Check box to send a monthly statement of account to the syndicate	Suggested
Acknowledgement of payment	Select to send an appropriate acknowledgement to the condominium	Yes
Balance payable previous year	Indicate if a balance is payable from the previous year of administration	Yes
Communication	Text box to include in an email during a communication	Yes
Send the communication	Checkbox to send the content of a communication by email	Yes

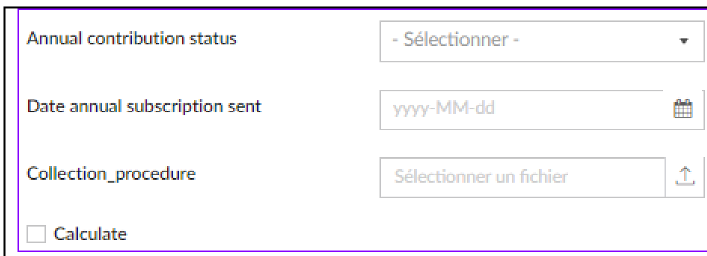
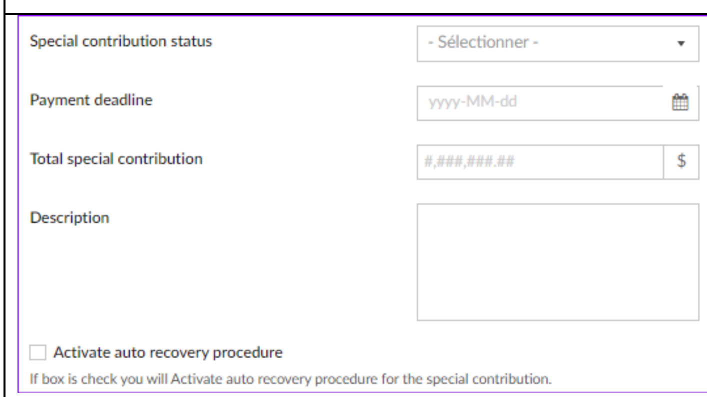
	Indicate the date and time of the next intervention. Indicate the status of the union. A checkbox if it is desired to send a monthly statement of account.
Selecting an appropriate acknowledgement when receiving a payment. Indicate an outstanding balance from the previous administration year. Checkbox to confirm the sending of an email communication.	
	Text box to send when communicating by email.

Contribution

This section is used to manage contributions for common charges as well as special contributions.

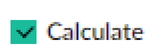
Field name	Description	Mandatory
Annual contribution status	Indicate contribution status	Yes
Date annual subscription sent	Enter the date of sending the annual dues	Yes
Collection_procedure	Uploaded the procedure the perception adopted by the syndicate	Suggested
Calculate	Checkbox to calculate the contribution	Yes

Total annual budget	Automatic calculation of the annual contribution	Automatic
Payment method	Choose the subscription payment method	Yes
Contribution amount	Calculation of the amount of the contribution according to the method of payment	Automatic
Special contribution status	Indicate the status of special contributions	Yes
Payment deadline	Enter the maximum date to make the payment	Yes
Total special contribution	Automatic registration of the calculation of the special contribution	Automatic
Description	Automatic registration of the description of the special contribution	Automatic
Activate auto recovery procedure	Checkbox to activate the sending of automated emails for the collection of the contribution	Suggested

	Indicate the status of the annual subscription. Indicate the date of sending the contribution. Uploaded the collection procedure. Check to calculate the union dues.
Amount of the syndicate's annual common expenses. Choose a payment method. Automatic calculation of the contribution.	
	Indicated the status of the special contribution. Deadline for making payment. Amount to be paid. Description why there is a contribution. Checkbox so that the collection procedure is automatic.

To calculate the union dues, **here is how;**

1. You ensure that all Budget Items including Item Type that are Redistributed Expenditure are completed.

2. Go to the Contributions section, then check the Calculate box 

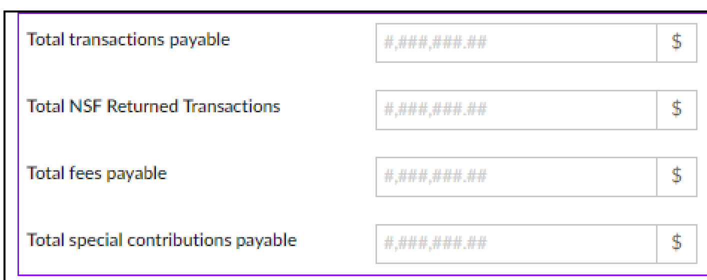
3. Indicate the Method of payment in order to calculate the contributions

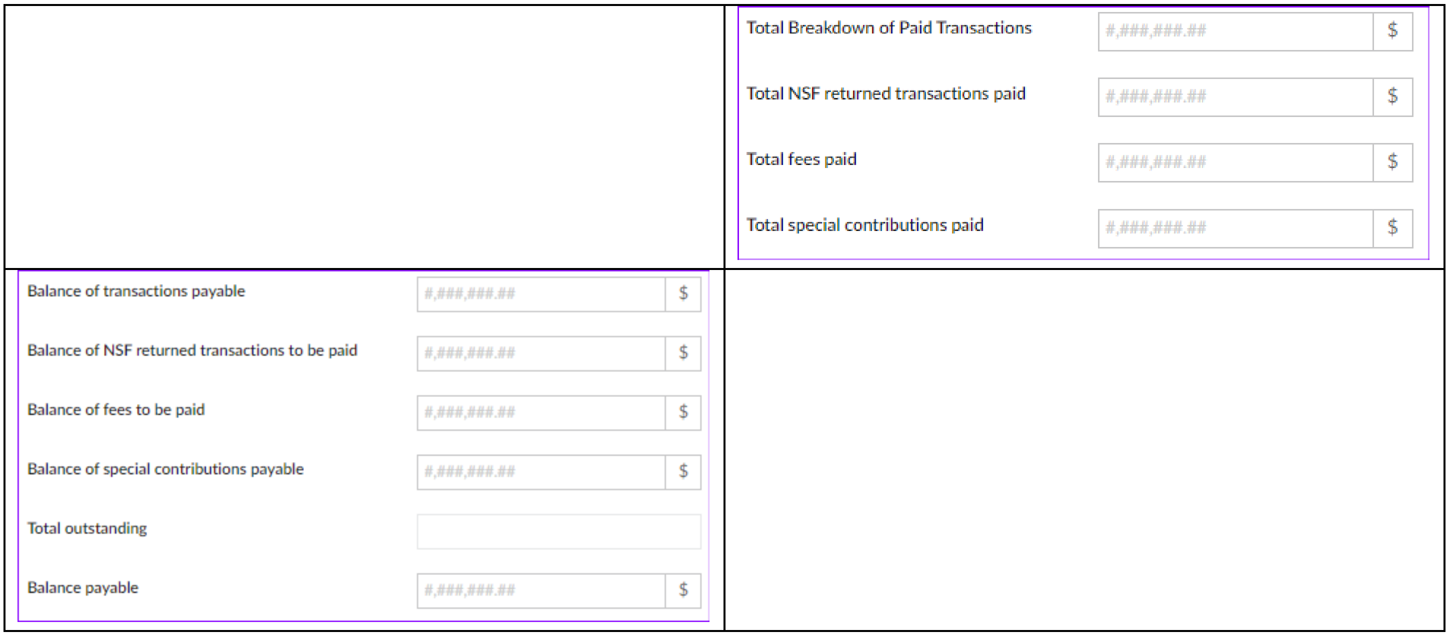
Once you have made the necessary changes to the form, save your changes by clicking on Submit Annuler.

Breakdown of payments

All calculation results are automatic and triggered when a transaction is added.

Field name	Description	Mandatory
Total transactions payable	Syndicate common expenses total	Automatic
Total NSF Returned Transactions	Total transactions returned by bank	Automatic
Total fees payable	Total fees payable from returned transactions	Automatic
Total special contributions payable	Total special contributions payable	Automatic
Total Breakdown of Paid Transactions	Total amount of payment transactions	Automatic
Total NSF returned transactions paid	Total amount of returned and paid transactions	Automatic
Total fees paid	Total amount of fees paid	Automatic
Total special contributions paid	Total amount of payment transactions of special contributions paid	Automatic
Balance of transactions payable	What remains to be paid	Automatic
Balance of NSF returned transactions to be paid	What remains to be paid	Automatic
Balance of fees to be paid	What remains to be paid	Automatic
Balance of special contributions payable	What remains to be paid	Automatic
Total outstanding	The total amount outstanding	Automatic
Balance payable	What remains to be paid	Automatic


Total transactions payable #,###,###.## $
Total NSF Returned Transactions #,###,###.## $
Total fees payable #,###,###.## $
Total special contributions payable #,###,###.## $

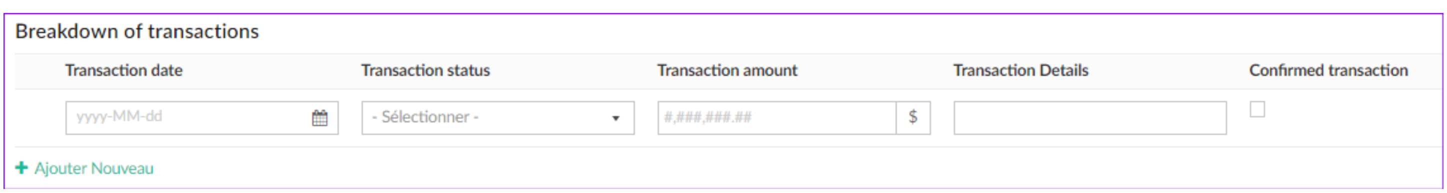


Breakdown of transactions

Remember...one transaction = one line!

Each transaction is accounted for in the Breakdown of payments.

Field name	Description	Mandatory
Transaction date	Enter the date of the transaction	Yes
Transaction status	Enter the status of the transaction	Yes
Transaction amount	Enter the amount of the transaction	Yes
Transaction Details	Enter the details of the transaction	Yes
Confirmed transaction	Check to perform the calculation and confirm the transaction	Yes



To confirm a transaction, check the **Confirmed transaction** box on the transaction line.

Sending the notice of annual contribution

All Syndicates receive one and simultaneously!

The notice of annual dues of the Affiliated Syndicates is so that the Board of Directors (the principal/responsible Board) can meet the obligations of the common charges with the goal of preserving the common good.

Annual syndicate contribution. Same for the reminder 5 days after **Date annual subscription sent.** The **Annual contribution status** will be updated to **Reminder.**	**CondoLogie** An administrative science application that does everything for the condominium! Hello ${Name_of_the_administrator_in_charge}. **Syndicate Name:** ${Syndicate_Name} Following an in-depth analysis to produce a budget that represents the reality of the condominium, you will find the details of your annual contribution calculated according to the redistribution. Here are the details of your annual dues **Year of administration:** ${Ann_e_d_administration} **Total annual contributions:** ${Total_budget_annuel} $ **Your method of payment according to the benefit of the term:** ${Mode_de_paiement} **Contribution amount:** ${Montant_de_la_cotisation} $ (Preferred method of payment = PAD pre-authorized debit. Accepted method = check, Interac transfer) By replying to this email, indicate your Method of Payment by providing all the information necessary for the collection of your contributions. Thank you for your cooperation and have a nice day! **Your Board of Directors** ${Principal_condominium} Administered with CondoLogie.com 2023 - All Rights Reserved

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Sending monthly statement for contribution

Sent monthly when **Send account statement monthly** is check. ☑ Send account statement monthly	**CondoLogy** An administrative science application that does everything for the condominium! Hello ${Nom_de_l_administrateur_en_charge}. **Syndicate name;** ${Nom_du_syndicat} Here is your statement to date. **Beginning of the period;** ${D_but_ann_e_d_administration} **End of period;** ${Fin_ann_e_d_administration} **Balance of transactions payable; ${Solde_des_transactions_payer}** $ **Balance of NSF returned transactions to be paid;** ${Solde_des_transactions_retourn_es_NSF_payer} $ **Balance of fees to be paid;** ${Solde_des_frais_payer} $ **Balance of special contributions payable;** ${Solde_des_cotisations_sp_ciales_payer} $ **Total outstanding;** ${Total_impay} $ **Balance payable;** ${Solde_payer} $ Thank you for your collaboration! **Your Board of Directors** ${Principal_condominium} Administered with CondoLogy.com 2023 - All Rights Reserved

If; You have received the syndicate **Payment method** including details for collecting the contribution. Go to the line representing the syndicate then, open the file concerned by clicking on the three small green dots **...** of this file then, on **Edit.** Change the **Annual contribution status** to **Received & Up to date.**

You make sure that the **Reminder Date-Time** is well indicated as well as the **Syndicate status**.

Once you have made the necessary changes to the form, save your changes by clicking on Submit Annuler.

Perception & Recovery

After 10 days of the **Date annual subscription sent.** Last reminder is sent. The **Annual contribution status** will be updated to **Perception** When **Annual contribution status** is Perception, at this point, the Board of directors should take appropriate measures.	**CondoLogie** An administrative science application that does everything for the condominium! Hello ${Name_of_the_administrator_in_charge}. **Syndicate Name:** ${Syndicate_Name} **Last reminder before collection;** You must note that we have not received the details in order to collect your contributions. You will find the details of your annual contribution calculated according to the redistribution. **Here are the details of your annual dues** **Year of administration:** ${Ann_e_d_administration} **Total annual contributions:** ${Total_budget_annuel} $ **Your method of payment according to the benefit of the term:** ${Mode_de_paiement} **Contribution amount:** ${Montant_de_la_cotisation} $ (Preferred method of payment = PAD pre-authorized debit. Accepted method = check, Interac transfer) By replying to this email, indicate your Method of Payment by providing all the information necessary for the collection of your contributions. Thank you for your cooperation and have a nice day! **Your Board of Directors** ${Principal_condominium} Administered with CondoLogie.com 2023 - All Rights Reserved

If; You have received the syndicate **Payment method** including details for collecting the contribution. Go to the line representing the syndicate then, open the file concerned by clicking on the three small green dots **...** of this file then, on **Edit.** Change the **Annual contribution status** to **Received & Up to date.**

You make sure that the **Reminder Date-Time** is well indicated as well as the **Syndicate status**.

Once you have made the necessary changes to the form, save your changes by clicking on Submit Annuler.

Change of Year of Administration

Important: Before making the transition to the new year of administration, archive all the reports of your administration in order to be able to find information quickly.

Description of the condominium

From the **Description of the condominium Report**, simply open the condominium file by clicking on the three small green dots **...** then, on **Edit.** Modify the **Administration started on** and the **Administration finished on.**

Next, update the fields in the **Parameters of the Condominium section** of the right column;

Expected annual inflation [ ] %	Change the inflation percentage if necessary.
Previous budget amount #,###,###.## $	Enter the amount of the previous budget.
Amount in cash #,###,###.## $	Enter the new amount in cash.
Amount in hand of the provident fund #,###,###.## $	Enter the new amount in the FDP Contingency Fund.
Provident fund transfer rate [ ] %	Enter the transfer rate in the PDF.
Investment income #,###,###.## $	Enter the amount of investment income.
Destination of investment income - Sélectionner -	Choose the destination of the investment income.
Amount in cash allocated to the auto insurance fund #,###,###.## $	Enter the amount allocated to the auto insurance fund.
Loan balance #,###,###.## $	Enter the balance of the loan.
Line of credit balance #,###,###.## $	Enter the line of credit balance.

Then save the file again.

Budget items

This sequence of changing administration dates contains formulas and must be done in order.

1. It is possible to mass modify from the **Budget Items report** the date of **Administration started on** by editing the fields. Click on Administration started on then on Edit Duplicate Plus select **Administration started on** to be modified, once selected, point with the mouse and select the columns, then click on them. Enter the data to modify or add in the field then click on Appliquer , then **Yes**.

2. It is possible to mass modify from the **Budget Items report** the date of **Administration finished on** by editing the fields. Click on Administration started on then on Edit Duplicate Plus select **Administration finished on** to modify, once selected, point with the mouse and select the columns, then click on them. Enter the data to modify or add in the field then click on Appliquer, then **Yes**.

3. However, we do not **recommend** that the **CURRENT FISCAL YEAR** column be mass edited. You would unnecessarily lose the line where you went to prepare or modify your upcoming budget.

Adjustment of the budget for the new year of administration

Three ways!

1- Open the items of the budget one by one in order to modify the **Annual cost** maintenance according to the real-time evaluation of the administrators. This way is definitely the fairest.

2- Only **if** the item t**ype** is **=** to **Expense. Modify the Next Budget Increase** the percentage field one by one by checking the box at the beginning of the line of the item and then clicking the button at the top of the page Edit. Enter the name of the field to modify next Next budget increase then modify the value Next budget increase % then click on Appliquer. The amount of the **Annual Cost** will be adjusted according to the value of the **Next Budget Increase** as well as the **Amount of the next payment** according to the **Payment Term.**

3- Only **if** the **Item Type** is **=** to an **Expense.** Modify all the **Next Budget Increase percentage fields** by the same value by checking the box Administrat... and then clicking the button at the top of the page Edit. Enter the name of the field to modify next Next budget increase then modify the value Next budget increase % then click on Appliquer. The amount of the **Annual Cost** will be adjusted according to the value of the **Next Budget Increase** as well as the **Amount of the next payment** according to the **Payment Term.**

Important; We recommend changing the date Current fiscal year manually individually or in bulk by sections to easily know which line you are on to update the budget for the coming administration year.

For **Type of item** = to **Transfer**, produce the modification manually.

Adjust the transfer to the PCF detailed on page 29

Adjust the transfer to the PCF detailed on page 30

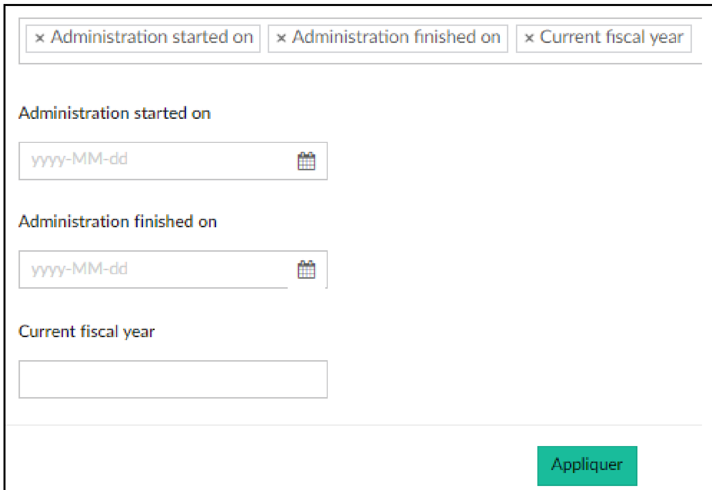
In Description of the condominium; Finalization of the calculation of Common Charges (condo fees) detailed on page 47

Register of Condominium

The register of condominium includes a multitude of calculations since the contributions are administered there. It is possible to mass modify the date of **Administration started on, Administration finished on** & **Current fiscal year** by editing the fields from Register of co-owners Report. Click on 

then on 

select the field to modify by gradually entering the name of the field. Select it!

	Once the fields are selected, enter the date changes. Enter the data to modify or add in the field then click on apply  .

Finalize the calculation of contributions by checking the box **Calculate** details on page 47

Sending notices of assessment detailed on page 49

Here we go again for another year of administration!

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CondoLogy on YouTube

Visualization Timeline

EP1 CondoLogien, let me introduce myself!
EP2 CondoLogy Presentation
EP3 Let's introduce CondoBot !
EP4 Condominium Description Overview
EP5 Description of the condominium Importation
EP6 Description condominium Parameter
EP7 Description condominium Common Areas
EP8 Budget Items + Import
EP9 Importation Macro and Micro mode
EP10 Budget Items Administration scenarios
EP11 Budget Items, as promised!
EP12 Budget Item, a simple item!
EP13 Budget Items & Contingency funds
EP14 Budget Items, Recapitulation
EP15 Register of the condominium, review of the form
ENG16 Condominium Register, communication
EP17 Budget Items, Budget
EP18 Budget item, Alignment of the contingency fund
EP19 Budget Items, Confirmation
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CondoLogie

CondoLogy

A full procedure manual for an administrative science application that does everything for the condominium!

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CondoLogy, the movie

Conclusion

CondoLogy is an application entirely programmed in Montreal, Quebec, Canada. It allows users to simply administer condominiums with transparency and efficiency in order to save time and money.

Simple is that!