



# WHAT TO LOOK FOR IN CONDO MANAGEMENT SOFTWARE

Managing a condominium community is hard work. Keeping on top of finances, maintenance, security and communication is a challenge. Each day things break down, residents have concerns and amenities are booked for personal use. Meetings and events need to be organized and reported on. Tracking the hundreds of interactions that can occur daily is a monumental task. Attempting to manage this using paper is unnecessarily frustrating, time-consuming, error prone and a recipe for disaster.

Fortunately, vendors have created condominium management software for this purpose. While technology can't prevent things from breaking down or water from leaking, it can keep track of activities, provide access to information and manage communications so that one person can seamlessly manage all building activities.

Condominium management software is an economical, efficient and practical solution allowing complete management of all activities occurring in a community, simplifying communications and tracking everything that needs to be done each day. When selecting a product, the two most important considerations are: (1)

meeting your current needs; and (2) ensuring your product can meet future needs. Condominium management software should make your life simpler, not more complex. Proper planning avoids having to inefficiently cobble together multiple systems to get work done.

Nicolas Gill of [BuildingLink Canada](#) and Mark Bush of [UpperBee Software](#), both of which offer a comprehensive product for condominium communities, worked with [Toronto Condo News](#) to summarize the ways this technology is utilized, and

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identify the most useful features.

### Administration and Unit Management



Maintain complete records on each unit including personal contact information, locker ownership, parking spaces, access devices and bicycle space management. Separate record keeping for owners and tenants support

those renting their space. Permissions control facilitates customized access and modification of this information.

- Management of service requests from owners and tenants.
- Access to documents, forms, and information (FAQs).
- Reports to help manage service requirements, complaints and comments.
- Features allowing you to monitor performance and manage workflows. Management becomes aware of how long service requests have been open, if specific problems are repetitive, resident satisfaction with how a matter has been handled, and additional operational details.

### Communication

Communication with individuals and groups should be easy and secure. The best software allows for e-mail, text, phone and automated voice recordings, allowing management to communicate with each resident in a manner most convenient to each.

- Software must be web-based for access to stored information and applications anytime anywhere, with ease of use across all devices.
- Provide for a user portal that establishes a condo community website.
- Allow for individual or broadcast messaging and notices to inform residents of building maintenance, meetings, social activities, and other important information.

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**Event Management and Amenity Booking**

Scheduling events and booking of amenities. This information is typically displayed on an online calendar available to all according to permissions.

- Bookings for common use areas including elevator, party room, meeting rooms and exercise equipment can reduce traffic at the concierge desk and management office.
- Reports help determine usage and popularity of amenities.
- The best systems allow residents to schedule activities without involving management or concierge.

**Security, Parking and Package Management**

- Maintain a record of who has been provided with key fobs, transmitters and/or access cards along with controlled access for each device.
- Maintain visitor records by unit.
- Log of supplier visits.
- Allows building employees and suppliers to obtain restricted or limited building access, and restricted access to information. Residents can provide access instructions or information about their visitors to the concierge.
- Record package deliveries and provide automatic notification to residents.
- Print parking and visitor permits.

**Financial Management**

Some communities may desire comprehensive accounting, budgeting, and financial planning functionality in their management software. For communities seeking basic accounting, budgeting, and forecasting features, the minimum functionality should include:

- Basic invoicing, accounting, and reporting features.
- Tracking of amounts paid and due by condo

owners, possibly tenants, and those due to suppliers.

- Support for multiple payment options including cheque and pre-authorized debit.
- Financial transaction audit trails to ensure integrity.

**Equipment Lists and Maintenance Logs**


Create building zones, systems, equipment and component lists, and track maintenance activities.

- Maintain a record of all equipment including location, specifications, warranty, required maintenance, and contracts in place to service them.
- Generate purchase orders and link them to corresponding invoices.
- Generate custom maintenance activities.
- Assign and track staff maintenance activities with detailed task lists and work scheduling.

Condominium management software provides an all-in-one set of tools designed specifically for condominium communities. Used effectively it is a comprehensive solution relied upon by condominium management and directors, and will improve the living experience for the residents they serve.

