

USE IT MATE

THE PM FOLDER BLUEPRINT

SOP for organising Property Management files in SharePoint.

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- Stop losing files and wasting time searching
- Ensure strict privacy for Trust Account and HR data
- Make onboarding new staff incredibly fast

Store the completed checklist with employee records.

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RESTRICTED FOLDERS

(Directors & Management)

Create these top-level folders and immediately restrict access.

- **01_Management (Access: Directors Only)**

- Sub-folders:

- 01_Financials
- 02_Legal
- 03_Strategy

- **02_HR_and_Team (Access: Management & HR)**

- Sub-folders:

- 01_Employee_Records
- 02_Payroll
- 03_Policies
- 04_Onboarding

- **03_Trust_Accounting (Access: Trust Accountants & Directors)**

- Sub-folders:

- 01_End_of_Month
- 02_Creditors
- 03_Audits

Important:

Never store these folders in a general "Team Drive." Permissions must be explicitly set at the top-level folder to prevent accidental data exposure.

Tip: Double-check permissions on the Trust Accounting folder every quarter.

GENERAL ACCESS FOLDERS (Team Operations)

□ **04_Property_Management (Access: PM Team)**

□ Sub-folders:

- 01_Leasing
- 02_Active_Properties
- 03_Maintenance
- 04_Tribunal

□ **05_Sales (Access: Sales Team)**

□ Sub-folders:

- 01_Appraisals
- 02_Listings
- 03_Contracts

□ **06_Marketing_and_Admin (Access: All Staff)**

□ Sub-folders:

- 01_Brand_Assets
- 02_Social_Media
- 03_Templates

Note: Avoid creating deep, complex sub-folders within "Active Properties." Rely on your core PM software (e.g., PropertyMe) as the primary source of truth.

FINAL SECURITY CHECK

Ensure the new structure is secure before migrating data.

- Verify no staff are saving files locally to their "Desktop" or "Documents"
- Confirm external sharing links are disabled or set to expire automatically
- Check that "Anyone with the link" sharing is turned off in the SharePoint Admin Center

Sounds like a lot of work?

We can build this for you. We design clean, logical folder structures, migrate your active files to a central secure SharePoint, set strict access permissions, and train your team.

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ROLLOUT CONFIRMATION

Confirm the new folder structure has been implemented and staff have been notified.

Agency Name: _____

Implemented By: _____

Date of Rollout: _____

Checklist:

- Folders created in SharePoint
- Permissions tested and verified
- Staff notified of the new structure
- Legacy folders set to "Read Only"

I confirm the new folder blueprint is active and old file locations are being phased out.

Manager Signature: _____

Date: _____

This checklist is provided as a general guide. For full implementation or assistance, professional IT support may be required.