



## Lot owners and the lot owners card

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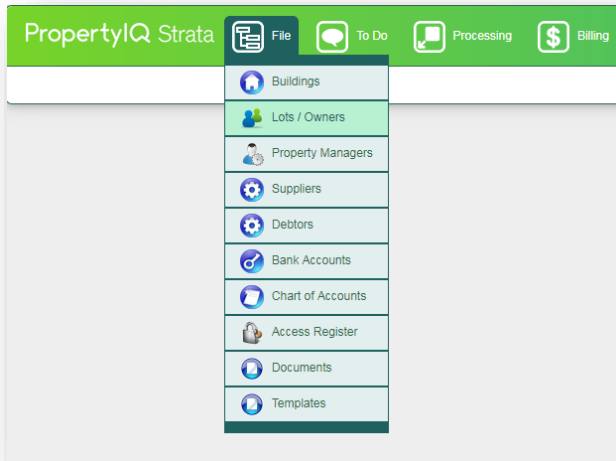
## INTRODUCTION TO THE LOT/OWNERS CARD

The lot owners card contains all the information about an individual Lot Owner. For information about the lot owners screen and bulk lot owner functions, see the Manual, “Lots Owners Screen”.

## GETTING STARTED



To Get Started, go to the menu and click on Lots/Owners



## ADDING NEW LOT OWNERS

Click on the **+Add** button on the bottom right of the lot owners screen

PropertyIQ Strata File To Do Processing Billing End of Period Reporting Utilities Help Log Out Currently Logged in as: timla Carstairs  
Role: Administrator  
0.156.1 11/09/2018

### Lots

	C.T.S.	Lot	Unit	CRN	Owner	Street No	Street Name	Building Name	Strata Manager Name	Corr. Method	Delivery Method
<input type="checkbox"/>	14	1	1	0000000783	Alan Shearer	122	A Beckett Road White Hart Lane	ST JAMES PARK	Sue Crame	Owner	Post
<input type="checkbox"/>	14	2	2	0000000784	Alan Shearer	122	White Hart Lane	ST JAMES PARK	Sue Crame	Owner	Email
<input type="checkbox"/>	14	3	3	0000000785	Alan Shearer	122	White Hart Lane	ST JAMES PARK	Sue Crame	Owner	Post
<input type="checkbox"/>	14	4	4	0000000786	Harry Kane	122	White Hart Lane	ST JAMES PARK	Sue Crame	Owner	Post
<input type="checkbox"/>	99	1	1	0000000047	Toby Noad	12	Jones street	Peppermint Gardens	Anne Fluva	Owner	Post
<input type="checkbox"/>	99	2	2	0000000254	Penelope George	12	Pine Avenue	Peppermint Gardens	Anne Fluva	Owner	Post
<input type="checkbox"/>	99	6	66	0000000729	Geddy Concrete Pty Ltd	12	Pine Avenue	Peppermint Gardens	Anne Fluva	Owner	Post
<input type="checkbox"/>	137	1	1	0000000644	Dodd Pty Ltd	79	O'Sullivan Road	Darley	Anne Fluva	Owner	Post
<input type="checkbox"/>	137	2	2	0000000761	Dodd Pty Ltd	79	O'Sullivan Road	Darley	Anne Fluva	Owner	Post
<input type="checkbox"/>	137	3	3	0000000762	Dodd Pty Ltd	79	O'Sullivan Road	Darley	Anne Fluva	Owner	Post
<input type="checkbox"/>	156	1	1	0000000824	Deb Thompson	1	George Street	Fairland Resort	Jay-Anne Mantulac	Owner	Post
<input type="checkbox"/>	156	2	2	0000000825	Tracy Yates	1	George Street	Fairland Resort	Jay-Anne Mantulac	Owner	Post
<input type="checkbox"/>	156	3	3	0000000826	Jessica Reilly	1	George Street	Fairland Resort	Jay-Anne Mantulac	Owner	Post
<input type="checkbox"/>	156	4	4	0000000827	Tanya Grace	1	George Street	Fairland Resort	Jay-Anne Mantulac	Owner	Post
<input type="checkbox"/>	691	45	45	0000000249	Anna Georgiopolos	1-7	1-8 Pye Street	Aurora Tower	Anne Fluva	Owner	Email
<input type="checkbox"/>	691	94	94	0000000250	Ryvale Pty Ltd	1-7	1-8 Pye Street	Aurora Tower	Anne Fluva	Owner	Email
<input type="checkbox"/>	692	12	12	0000000251	Charlie Alexander	2-10	Pye St	Skyline	Anne Fluva	Tenant	Email/Post
<input type="checkbox"/>	692	19	19	0000000252	Emily Beard	2-10	Pye St	Skyline	Anne Fluva	Other	Email/Post

0 selected Show Legend Import Link Lot Owners Change Owners Email Merge Export Data Source Add Mailing Labels Bulk SMS Direct Debit Invite **+ Add** View

1. Click on the search icon to find the building you want to add lot owners to
2. Type some key letters in any of the boxes on the top line to refine your search and find the building you are looking for.
3. Click on the building, to highlight it
4. Click on *Select* to select the building (or double click on the highlighted building)

**LotOwner**

SPlan\*  Lot\*  Unit\*  Street No\*

Street Name\*  Suburb\*  Accessory Unit  UOE\*

Owner Info:

Owner Name\*  (Ah)  Email

(Bh)  Suburb  Contact Name

Fax  Paid to  Last Status

Committee Member: N

**Contact** **Info** **Delivery** **Settings** **Ledger** **Notes** **Documents** **Alerts** **SMS** **Log of Changes**

**Owner Address**

Mailing Address\*  ☒ Mailing Label

Suburb  State  PCode

**Joint Owner**

**Tenancy Details**

Owner Occupier ☒

Name  (Ah)  (Bh)

Mobile  Email

Lease Expiry

Notes

Property Manager

**Save** **Cancel**

**Buildings**

SPlan\*  Building Name  Site  Street Name  Suburb  State  Pos.  Manager  Lots  Units  Folio

☒ 270976 Moorings on Cavill 63 Cavill Avenue SURFERS PARADISE QLD 4217 Training Manager 4 4 Gro...

**Show Legend** **+ Add** **Edit** **Select** **Close**

**all** **Merge** **Export** **Data Source** **Add Mailing Labels** **Bulk SMS** **+ Add** **View**



In this example, the building the lot is being created for is located in Queensland. There are some differences to the terminology in other states.

1. Once the building is selected, it will show here
2. Enter the Lot number here
3. The program will automatically fill the unit box with the same number as the lot, but you can overtype if the unit number is different to the lot number.
4. The street number populates automatically from the building details
5. The street name populates automatically from the building details
6. The suburb populates automatically from the building details
7. If this is an accessory unit, for example a carpark – type the details here
8. Type the units of entitlement for this lot here
9. Type the interest entitlement units here. This is only required in Queensland
10. A CRN (customer reference number) will be automatically assigned to all new lot owners. This is the number that identifies each lot owner for DEFT payments
11. You will see this notification if this lot owner is a linked owner to other lots
12. Type the details for the main owner here
13. By default, the lot owner will not be a committee member. You can add them to the building's committee from the building card>Info Tab>Committee
14. There is no need to complete anything here – when you enter the opening balances, and then as the owner makes payments, this will update automatically
15. This is populated when you process a change of owner
16. When you start adding a Lot, the program defaults to the contacts tab and the owner address and tenancy details tabs will be open. Type the owner's address here. This is the address for service of all notices and items of correspondence that are sent to the owner.
17. If you use mailing labels and want this address to be the default for generating mailing labels, click here.
18. Click Save to save any changes you have made

**Lot/Owner**

**C.T.S.\***

270976 Moorings on Cavill 63 Cavill Avenue

Lot 8 Unit 8 Street No 63

Street Name\* Cavill Avenue

Suburb\* SURFERS PARADISE

Accessory Unit 34

UOE\* 20

Interest Entitlement\* 25

CRN 0000000377

**Owner Info**

**NOTE: This lot owner is linked to 3 other owners**

Owner Name\* Costa Gianapolous

(Ah) 075746 8734 Email costag@hotmail.com

(Bh) 073948 9845 Salutation Mr

Mobile 0415453 456 Contact Name Costa

Fax 07564 7688 Paid to Last Settled

Committee Member: N

**Contact** Info Delivery Settings Ledger Notes Documents Alerts SMS Emails Log of Changes

**Owner Address**

**Mailing Address\*** PO Box 256 ☒ Mailing Label

Suburb SURFERS PARADISE State QLD P/Code 4217

**Legal Residence Address**

**Power of Attorney**

Joint Owner

Tenancy Details

Save Cancel

---

## Tenant Accordion

1. *Owner occupier* will be ticked by default and the tenant fields will be greyed out. Untick this if the property is tenanted to enable completing details for the tenant.
2. Enter the date the tenancy details were received here
3. If this tenant is the formal tenant, tick here. A formal tenant is the contact that can attend meetings in New South Wales. The formal tenant will receive copies of meeting notices if you have ticked. "Send meeting notices to tenants" in your Settings>Meeting Settings
4. Select the method of delivery for any notices that are sent to the tenant. They can receive notices by email, post or both
5. Type a salutation for the tenant. This will be used for any notices you need to send to the tenant.
6. Type the tenant's name as it appears on the tenancy agreement. This will be used for any notices you need to send to the tenant.
7. If the tenancy is an entity other than an individual e.g. "Barneys Gifts Pty Ltd" you can enter a contact name here
8. Enter the tenant's after hours phone number here
9. Enter the tenant's business hours phone number here
10. Enter the tenant's mobile phone number here
11. Enter the tenant's email address. This is the email address that will be used for any emailed notices.
12. Enter the lease start date here
13. Enter the lease expiry dates here. This is the end date for the fixed term of the tenancy agreement.
14. Enter any notes you want to record about the tenant here
15. If the lot has a property manager, click on the search icon to find a property manager that is already recorded. You can add new property managers here or edit existing property managers. See below for details.
16. Click *clear* to remove the property manager association for this lot

**Tenancy Details**

Owner Occupier ☐ **1** Date Received  **2**

Formal Tenant ☒ **3**

Deliver by\* ☒ email ☒ post **4**

Salutation  **5**

Name  **6**

Contact Name  **7**

(Ah)  **8** (Bh)  **9**

Mobile  **10**

Email\*  **11**

Lease Start  **12**

Lease Expiry  **13**

Notes  **14**

Property Manager  **15**  **16**

Property Manager

<b>Agent</b> Ned Flanders	<b>Agent Email</b> ned@flanders.com
<b>Company</b> Neds Real Estate	<b>Phone</b> +61 2 9876 6789
<b>Address</b> 56 Springfield Crescent SPRINGFIELD NSW 2999	<b>Fax</b>
	<b>Email</b> ned@flanders.com

## ADDING A NEW PROPERTY MANAGER

**Property Managers**

**Property Managers**

All Active Inactive

Name	Address	Company Email	Phone 1	Mobile
Ray White Richmond	PO Box 789 agent ...	grace@rwrnsw.au		0469 882 453
My Property Nation...	12/56 Nelson Street			
Geoff Green Real E...	addr1 addr2 addr3	admin@ggre.com.au		
LR REED				
Best Practice Propo...	5 Collins Street	mystrataclients@gg...		
BPM	15 Screen St		(03) 8649 1594	0422 042 042

Click +Add to add a new Property Manager

**Property Manager**

Company Name  Company Email

Phone 1  Mobile

Phone 2  Fax

Contact

Agent Name  Agent Email

Address

Address  Suburb

State  PCode

Enter the Property Manager's Details and then click Save. The email address you enter will be used for any notices that are sent to the Property Manager

Printing Labels

## Joint Owner

If this lot has a joint (additional) owner, you can record the details here.

If you want all owners' names to show on levy notices, you should enter multiple names in the Owner name field at the top of the lot owner card.

1. Click on the little white arrow next to the Joint Owner accordion to open it
2. Type the joint owners contact details here. The details you enter here will be only used for any notices you send to the joint owner
3. Click save to save your changes.

Lot/Owner

C.T.S.\* 270976 Moorings on Cavill 63 Cavill Avenue

Lot 8 Unit 8 Street No 63

Street Name\* Cavill Avenue

Suburb\* SURFERS PARADISE

Accessory Unit

UOE\* 20

Interest Entitlement\* 25

CRN 0000000377

Owner Info

NOTE: This lot owner is linked to 3 other owners

Owner Name\* Costa Gianapolous

(Ah) 075746 8734 Email fayelynetegoodman@gmail.com

(Bh) 073948 9845 Salutation Mr

Mobile 0415453 456 Contact Name Costa

Fax 07564 7688 Paid to Last Settled

Committee Member: N

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS Emails Log of Changes

Owner Address

Joint Owner

Name Anastasia Gianapolous

(Ah) (Bh)

Mobile 0412 332 234

Email Ana@gmail.com

Mailing Address 4 Surf Street

Suburb NOOSA HEADS State QLD P/Code 4125

Tenancy Details

Save Cancel

## Legal Residence Address Accordion

If the lot owner lives overseas, you can enter their Australian address here to satisfy legislative requirements. This address is not used for any correspondence but does appear on the Strata Roll.

1. Click on the little white arrow to open the residence address accordion
2. Type the details
3. Click *Save* to save your changes

Lot/Owner

C.T.S.\* 888777 Hornsby Towers 15 Florence Street

Lot 1 Unit 201 Street No 15

Street Name\* Florence

Suburb\* HORNSBY

Accessory Unit

UOE\* 10

Interest Entitlement\* 25

CRN 0000000294

Owner Info

NOTE: This lot owner is linked to 1 other owners

Owner Name\* Franca Swanden

(Ah) (Bh)

Mobile 0423 324 343 Email fayelynetegoodman@gmail.com

Fax Paid to 15/11/2018 Last Settled 01/02/2018

Committee Member: Y Committee Member Status: Active

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS Emails Log of Changes

Owner Address

Joint Owner

Tenancy Details

Legal Residence Address

Name Franca Swindells

Mailing Address 27 Karri Court

Suburb WAHROONGA State NSW P/Code 2077

Power of Attorney

Save Cancel

## Power of Attorney Accordion

If someone holds a power of attorney for this owner, enter the details here. This will not affect any of the delivery options. It is just a place to record these details for your own information.

1. Enter the date the information was received here
2. Enter the Power of Attorney's name here
3. Enter any after hours and business hours numbers here
4. Enter a mobile number here
5. Enter a fax number here
6. Enter an email address here
7. Enter a mailing address here

The screenshot shows a form titled "Power of Attorney" with a green header. The form contains the following fields and values, with numbered callouts indicating where to enter information:

- Date Received:** 01/08/2018 (Callout 1)
- Name:** Anita Gianapolous (Callout 2)
- (Ah):** 07 4544 5656 (Callout 3)
- (Bh):** 07 8787 3543 (Callout 3)
- Mobile:** 0415 545 454 (Callout 4)
- Fax:** (Callout 5)
- Email:** anitag@hotmail.com (Callout 6)
- Mailing Address:** 34 Arling Street (Callout 7)
- Suburb:** COOLANGATTA
- State:** QLD
- P/Code:** 4226



You can save the Lot Owner card once you have completed the contact details but it's best practice to continue to enter all the Lot/Owner information.

When you save a new lot owner, you will see the following options:

1. If the same owner owns more than one lot in the building, select the *Duplicate Lots* option. Enter the Lot numbers you want to create with the same owner
2. Click *Continue adding lots for the same building* if you want to create more lots that have different owners
3. Click on *Finished adding lots* when have finished adding lots for this building
4. Click *Done* when you have finished adding lots.

The screenshot shows a dialog box titled "Add Owner(s)" with a green header. The dialog contains the following text and options, with numbered callouts indicating where to click:

- Text:** Please select whether you want to create multiple lots by duplicating the previously entered lot, continue adding lots for the same building or finish editing the previously entered lot. (Callout 1)
- Lot Options:**
  - ☒ Duplicate Lots (Callout 2)
  - ☐ Continue adding lots for same building
  - ☐ Finished adding lots (Callout 3)
- Text:** Lot numbers can be entered as eg. 1-3,4,5-7,10
- Text:** 6-8 (Callout 4)
- Button:** Done

## PropertyIQ

### Lot Owners Card

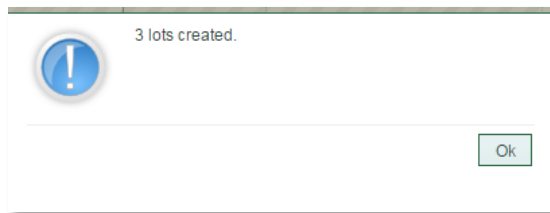
22.07.2020



If you select to Duplicate Lots you will see this message once they are created.



*The duplicated lots will have the same number of units of entitlement as the original lot so you will need to edit each lot owner card individually if they are different.*



## INFO TAB

1. If you have saved the lot owner card earlier, click on *Edit* to get started.

## Nominees Accordion

If the lot owner has a nominee, for example if the owner is a company and they want to nominate a representative, record the details here. This will not affect any of the delivery options. It is just a place to record these details for your own information.

1. Record the date the information was received here
2. Enter the nominee name here
3. Enter the after hours and business hours phone numbers here
4. Enter a mobile number here
5. Enter a fax number here
6. Enter an email address here
7. Enter the mailing address here
8. Click on the + *Nominee* button to add a nominee
9. You can delete a nominee by clicking on the *delete* button

**Nominees**

Nominee

Date Received: 01/08/2018

Name: Harrison Sadler

(Ah): 07 6475 7665 (Bh): 07 8775 3434

Mobile: 0415 345 656

Fax:

Email: harrison@boltech.com.au

Mailing Address: 1 Gerwin Street

Suburb: BROADBEACH State: QLD P/Code: 4242

+ New Nominee

Delete

## The Mortgage Accordion

Some states require that the details of any mortgage be recorded. This will not affect any of the delivery options. It is just a place to record these details.

1. Click on the little white arrow next to the mortgagee accordion to open the accordion
2. Click on the + *New Mortgagee* button
3. Type the details of the mortgagee
4. You can delete a mortgagee by clicking here.

If there is more than one mortgagee, click on +*Mortgagee* to add more mortgagees

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS Log of Changes

**Nominees**

**Mortgagee**

Mortgagee

Name: Macquarie Bank Limited

(Ah): (Bh):

Fax:

Email: info@macquariebank.com.au

Commenced: 02/10/2016

Mailing Address: Level 6 - 7, 825 Ann Street

Suburb: FORTITUDE VALLEY State: QLD P/Code: 4006

+ New Mortgagee

Past Owners

Delete Save Cancel

## Past Owners

If you have processed a change of owner at any time, the details of the previous owner will show here. There is no need to add any details here. See the section below "Change Owners" for instructions on how to change owners or the manual "The Lots Owners Screen" for instructions on how to change owners in bulk.

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS Log of Changes

**Nominees**

**Mortgagee**

**Past Owners**

Past Owner

Name: Bailey Brown

(Ah): 9534 3232 (Bh):

Fax:

Email: mystratacustomers@gmail.com

Address: Unit 1/15 Florence Street

Suburb: HORNSBY State: NSW P/Code: 2077

Settled:

Paid To:

Past Owner

Name: Sally Bennett

(Ah): (Bh):

Fax:

Email:

Address: 4/15 Florence Street

Suburb: HORNSBY State: NSW P/Code: 2077

Settled:

Paid To:

Lot Owner Page Email Info Certificate Last Info Certificate Edit Done

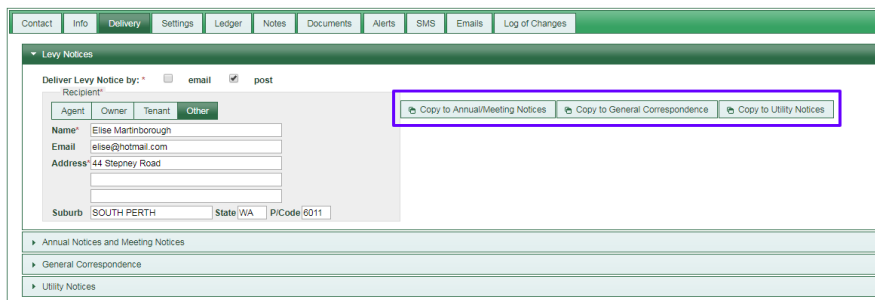
## DELIVERY TAB

The Delivery tab records the lot owner's preferred options for delivery of documents and communications.

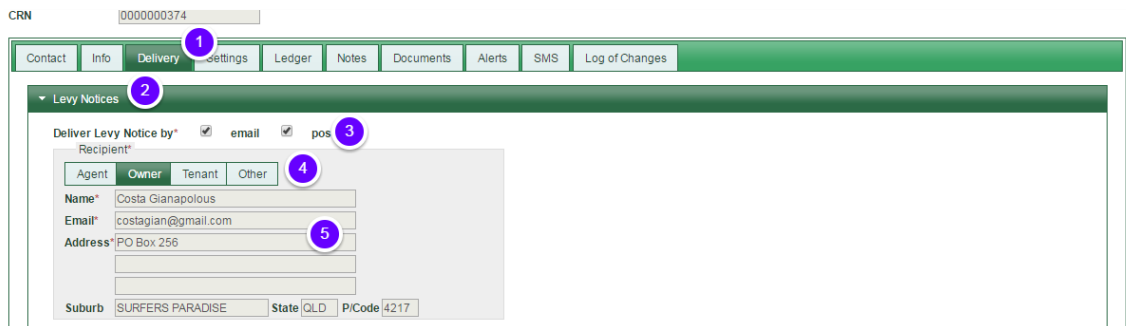
### Levy Notices Accordion

This Accordion records the lot owner's preferences for delivery of levy notices.

1. Click on the little white arrow next to the Levy Notices accordion to open the accordion
2. The default setting is to deliver by post to the owner – click post or email to change the preferences (Levy notices can be sent by one or both methods but at least one method must be selected)
3. The default setting is that the owner is the recipient. Click on Agent (Property Manager), Tenant, Joint Owner or Other if you want to alter. You can add an "Other" contact here if you wish – e.g. a relative or accountant that takes care of the owner's levy payment. If you choose "Other" you can copy the details to meeting notices and general correspondence to save data entry.



4. The details of the selected contact show here. They are greyed out and if you need edit the details, go to the Contact tab. (only the "Other" contact can be edited here)



### Annual Notices and Meeting Notices Accordion

An owner may want these items to go to a different contact and by a different method to their levy notices. For example, the levy reminders might go to the property manager to pay but the owner wants to receive the annual notices and general correspondence themselves.

1. Click on the little white arrow next to the Annual Notices and Meeting Notices accordion
2. Select the owner's preferred delivery method for annual notices
3. You can tick here if you want to exclude this owner from receiving meeting notices. For example, if this is an accessory lot just for a car space and they already receive meeting notices from another lot
4. The recipient will default to Owner but you can toggle between the tabs to alter

**Lot/Owner**

S/Plan\* 1288 Banksia Gardens 59 Albert Crescent

Lot\* 2 Unit 22 Street No 59

Street Name\* Albert Crescent

Suburb\* BURWOOD

Accessory Unit

UOE\* 20

CRN 0000000320

**Owner Info**

Owner Name\* Ben Carpenter

(Ah) Email bencarpenter@gmail.com

(Bh) Salutation

Mobile Contact Name

Fax Paid to 01/01/2017 Last Settled

Committee Member: Y Committee Member Status: Active

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS Log of Changes

Levy Notices

Annual Notices and Meeting Notices

Deliver Annual Notice / Meeting Notice by: \* ☒ email ☒ post

Do Not Include Meeting Notices

Recipient\*

Agent Owner Tenant Other

Name\* Ben Carpenter

Email\* bencarpenter@gmail.com

Address\* 45 Brougham Avenue

Suburb NORTH BRISBANE State QLD P/Code 4001

General Correspondence

Utility Notices

Save Cancel

## General Correspondence Accordion

1. Click on the little white arrow next to the general correspondence accordion
2. Select the owner's preferred delivery method for general correspondence
3. The recipient will default to Owner but you can toggle between the tabs to alter

**Lot/Owner**

S/Plan\* 1288 Banksia Gardens 59 Albert Crescent

Lot\* 2 Unit 22 Street No 59

Street Name\* Albert Crescent

Suburb\* BURWOOD

Accessory Unit

UOE\* 20

CRN 0000000320

**Owner Info**

Owner Name\* Ben Carpenter

(Ah) Email bencarpenter@gmail.com

(Bh) Salutation

Mobile Contact Name

Fax Paid to 01/01/2017 Last Settled

Committee Member: Y Committee Member Status: Active

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS Log of Changes

Levy Notices

Annual Notices and Meeting Notices

General Correspondence

Deliver General Correspondence by: \* ☒ email ☒ post

Recipient\*

Agent Owner Tenant Other

Name\* Ben Carpenter

Email\* bencarpenter@gmail.com

Address\* 45 Brougham Avenue

Suburb NORTH BRISBANE State QLD P/Code 4001

Utility Notices

Save Cancel

## Utility Notices Delivery Accordion

If the Building has a main meter and sub-meters for electricity and gas you can send Utility Notices from PropertyIQ Strata. This is done from the Billing menu. You could also send these notices using the special levy function. If you choose this option and choose utility invoices from the dropdown list, then the notice will go to the contact nominated here. For full details, see the manuals “Levies” and “Utility Invoices”

1. Click on the little white arrow to open the Utility Notices accordion
2. Select the owner’s preferred delivery method
3. The recipient will default to owner. You can toggle between the different recipients to alter. For example, if the unit is tenanted, the utility bills may go to the tenant.

Utility Notices

Deliver Utility Notices by\* ☐ email ☒ post

Recipient\*

Agent Owner Tenant Other

Name\* Costa Gianapolous

Email costagian@gmail.com

Address\* PO Box 256

Suburb SURFERS PARADISE State QLD P/Code 4217

Delete Save Cancel

## SETTINGS TAB

The Settings tab records information about legal action and repayment plans.

### Legal Action Accordion

1. Click on the little white arrow next to the Legal Action accordion
2. Tick if there is legal action relating to this owner
3. By default, once you add legal notes, any payments received from this owner via TXN file processing will not be auto allocated as per the auto allocation rules you have entered in your settings. You can override this if you want to, by ticking "Auto Allocate Levy Receipts"
4. Type any notes you need to record about the legal action. If you have ticked the legal action box in step 2, the details you enter here can be viewed when you are processing a due notice run so that you can decide whether you want to include this owner in the run. For details on how to process a due notice run, please see the manual "Due Notices"
5. Click *Save* to save your changes.

**Lot/Owner**

**S/Plan\*** 1 The Bachelor Pad 1-8 Hollywood Drive  
 Lot: 1 Unit: 1 Street No: 10  
 Street Name: Hollywood Drive  
 Suburb: MURWILLUMBAH  
 Accessory Unit:  
 UOE: 1  
 CRN: 0000000077

**Owner Info**  
**NOTE: This lot owner is linked to 3 other owners**  
 Owner Name: Brena Mulligan  
 (Ah): 111111111 Email: jack.dobinson@macquarie.com  
 (Bh): 222222222 Salutation:  
 Mobile: 333333333 Contact Name: Brena  
 Fax: Paid to: 30/07/2018 Last Settled: 01/05/2019  
 Committee Member: Y Committee Member Status: Active

**Debt Collection**  
 Stage:  ☐ Exclude from Debt Collection ?  
 Notes: This is a debt collection note. This is a debt collection note.

**Legal Action** (1)  
 Legal action ☐ (2) Auto Allocate Levy Receipts ☐ (3)  
 Notes: This is a legal action note. (4)  
 Repayment Plan  
 Direct Debit  
 Macquarie Direct Debit  
 Owner Interest  
 Save Cancel (5)

### Repayment Plan Accordion

1. Click on the little white arrow next to the Repayment Plan accordion.
2. Tick here if a repayment plan has been agreed on
3. By default, once you add repayment plan notes, any payments received from this owner via TXN file processing will not be auto allocated as per the auto allocation rules you have entered in your settings. You can override this if you want to, by ticking *Auto Allocate Levy Receipts*
4. Type any notes you need to record about the repayment plan here. If you have ticked repayment plan in step 2, the details you enter here can be viewed when you are processing a due notice run so that you can decide whether you want to include this owner in the run. For details on how to process a due notice run, please see the manual "Due Notices"
5. If the owner defaults on the repayment plan, enter the delinquency date here. This is just for your information; it does not affect any other part of the program.
6. Click *Save* to save your changes.

**Lot/Owner**

S/Plan\* 1 The Bachelor Pad 1-8 Hollywood Drive

Lot 1 Unit 1 Street No 10

Street Name\* Hollywood Drive

Suburb\* MURWILLUMBAH

Accessory Unit

UOE\* 1

CRN 0000000077

**Owner Info**  
 NOTE: This lot owner is linked to 3 other owners  
 Owner Name\* Brena Mulligan  
 (Ah) 111111111 Email jack.dobinson@macquarie.com  
 (Bh) 222222222 Salutation  
 Mobile 333333333 Contact Name Brena  
 Fax  
 Paid to 30/07/2018 Last Settled 01/05/2019  
 Committee Member: Y Committee Member Status: Active

**Debt Collection**  
 Stage  ☐ Exclude from Debt Collection ?  
 Building Debt Collection: Y Repayment Plan: N Legal Action: N  
 Notes This is a debt collection note. This is a debt collection note.

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS Emails Log of Changes

Legal Action

Repayment Plan 1

2 Repayment plan ☐ Auto Allocate Levy Receipts ☐ 3

Notes  
 This is a repayment plan note. 4

Delinquency Date 5

Direct Debit

Macquarie Direct Debit

Owner Interest

6 Save Cancel

## DIRECT DEBIT ACCORDION

This feature is now redundant and has been replaced by the Macquarie Direct Debit functionality. See [Macquarie Direct Debit Accordion](#) below.

## MACQUARIE DIRECT DEBIT ACCORDION

This accordion will be visible on the lot card if you have enabled the Macquarie Direct Debit feature in your PropertyIQ. To enable this feature email [support@propertyiq.com.au](mailto:support@propertyiq.com.au) and ask for Macquarie Direct Debit to be enabled on your account. PropertyIQ Support will notify you once it's been enabled.

For detailed instructions on Macquarie Direct Debit, see the manual 'Macquarie Direct Debit (BIDD)'.

1. Click on the little white arrow next to the Macquarie Direct Debit accordion.
2. The unique DEFT reference number (DRN) for the lot appears here, which is used to make levy/fee payments.
3. Click here to check the lot's direct debit status. If the lot owner has opted into Macquarie Direct Debit, the popup message will confirm the account details. If the lot owner has not opted into Macquarie Direct Debit, the popup message will confirm it's not enabled.
4. If the lot is not enabled for direct debit, you can click here to issue an email invitation to the lot owner for Macquarie Direct Debit. The invitation will be sent directly by DEFT Payments Services to the lot's owners email address.

**Lot/Owner**

S/Plan\* 1 The Bachelor Pad 1-8 Hollywood Drive

Lot\* 1 Unit\* 1 Street No\* 10

Street Name\* Hollywood Drive

Suburb\* MURWILLUMBAH

Accessory Unit

UOE\* 1

CRN 000000077

**Owner Info**  
**NOTE: This lot owner is linked to 3 other owners**  
 Owner Name\* Brena Mulligan  
 (Ah) 111111111 Email jack.dobinson@macquarie.com  
 (Bh) 222222222 Salutation  
 Mobile 333333333 Contact Name Brena  
 Fax Paid to 30/07/2018 Last Settled 01/05/2019  
 Committee Member: Y Committee Member Status: Active

Change Owner  
Unlink Owner

**Debt Collection**  
 Stage Exclude from Debt Collection ? Building Debt Collection: Y Repayment Plan: N Legal Action: N  
 Notes This is a debt collection note. This is a debt collection note.

Contact Info Delivery **Settings** Ledger Notes Documents Alerts SMS Emails Log of Changes

Legal Action  
Repayment Plan  
Direct Debit  
Macquarie Direct Debit 1  
 DEFT Reference Number (DRN): 35235230000771 2  
☒ Check Status ☒ Send Direct Debit Invitation  
 Owner Interest 3 4

Lot Owner Page Email Info Certificate Last Info Certificate Edit Done

## OWNER INTEREST ACCORDION

1. Click on the little white arrow next to the Owner Interest accordion.
2. If you have a rule to charge interest on overdue levies and you want to waive it, tick here. This will waive *all* interest charges for this owner while it stays ticked.
3. Any interest pause periods linked to the lot will appear in the grid here.
4. Click here to view a selected interest pause period linked to the lot.

**Lot/Owner**

S/Plan\* 1 The Bachelor Pad 1-8 Hollywood Drive

Lot\* 1 Unit\* 1 Street No\* 10

Street Name\* Hollywood Drive

Suburb\* MURWILLUMBAH

Accessory Unit

UOE\* 1

CRN 000000077

**Owner Info**  
**NOTE: This lot owner is linked to 3 other owners**  
 Owner Name\* Brena Mulligan  
 (Ah) 111111111 Email jack.dobinson@macquarie.com  
 (Bh) 222222222 Salutation  
 Mobile 333333333 Contact Name Brena  
 Fax Paid to 30/07/2018 Last Settled 01/05/2019  
 Committee Member: Y Committee Member Status: Active

Change Owner  
Unlink Owner

**Debt Collection**  
 Stage Exclude from Debt Collection ? Building Debt Collection: Y Repayment Plan: N Legal Action: N  
 Notes This is a debt collection note. This is a debt collection note.

Contact Info Delivery **Settings** Ledger Notes Documents Alerts SMS Emails Log of Changes

Legal Action  
Repayment Plan  
Direct Debit  
Macquarie Direct Debit  
Owner Interest 1  
 Do not charge interest to owner ☐ 2  
**Interest Pause Periods**  

Description	Start Date	End Date	Lots
IPP Lot 1 3	1/10/2019		1

 4  
 View



## LEDGER TAB

The Ledger tab shows all the lot owner's financial history. A summary of their current position shows at the top.

If the building has multiple contribution schedules, you can click on each tab to toggle your view to show the details for each contribution schedule.

The screenshot shows the 'Ledger' tab selected in a software interface. At the top, there are tabs for Contact, Info, Delivery, Settings, Ledger, Notes, Documents, Alerts, SMS, Emails, and Log of Changes. Below the tabs, there are filters for 'Schedule' (All Schedules, Mooring Standard Contribution Schedule, Marina Maintenance) and 'Include Creator Details' (unchecked). The 'As At' date is set to 18/09/2018. The summary shows 'Paid to: \$0.00', 'Total Arrears: \$6,840.30', and 'Balance: \$6,840.30'. Below this is a table with columns: Date, Type, Number, Details, Account, Principle, Paid, Interest Due, Interest Paid, Discount/..., Total, Status, and Balance. The table lists four transactions from 1/1/2020 to 1/4/2019, each with a total of \$374.45 and a balance of \$9,134.75. At the bottom right, there are buttons for Print, Save, and Cancel.

Date	Type	Number	Details	Account	Principle	Paid	Interest Due	Interest Paid	Discount/...	Total	Status	Balance
1/1/2020	Std Levy	98	Standard Levy Moorings Stand... From: 01/01/2020 To: 31/03/2020 Moorings Standard Contributio... Discount Due: \$15.00	Levy Income Levy Income	Total Admin Sinking	\$374.45 \$330.01 \$44.44	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$374.45 \$330.01 \$44.44	Not yet due	\$10,258.10
1/10/2019	Std Levy	97	Standard Levy Moorings Stand... From: 01/01/2019 To: 31/12/2019 Moorings Standard Contributio... Discount Due: \$15.00	Levy Income Levy Income	Total Admin Sinking	\$374.45 \$330.01 \$44.44	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$374.45 \$330.01 \$44.44	Not yet due	\$9,883.65
1/7/2019	Std Levy	96	Standard Levy Moorings Stand... From: 01/07/2019 To: 30/09/2019 Moorings Standard Contributio... Discount Due: \$15.00	Levy Income Levy Income	Total Admin Sinking	\$374.45 \$330.01 \$44.44	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$374.45 \$330.01 \$44.44	Not yet due	\$9,509.20
1/4/2019	Std Levy	95	Standard Levy Moorings Stand... From: 01/04/2019 To: 30/06/2019 Moorings Standard Contributio... Discount Due: \$15.00	Levy Income Levy Income	Total Admin Sinking	\$374.45 \$330.01 \$44.44	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$374.45 \$330.01 \$44.44	Not yet due	\$9,134.75



A lot owner could show as being in advance as well as in arrears, if there is an unpaid past due levy as well as a levy that isn't due yet but has been paid.

1. Click here to include creator details
2. By default, the ledger will show the status as at today's date but you can click here to open the calendar and change the date (this amount of interest will show as at the date you select)
3. By default you will see all transaction types but you can filter your view by clicking on individual tabs
4. The current status of the lot owner shows here
5. Creation details show here if you have ticked to include creator details
6. The date the item was created shows here
7. Details show in this column
8. The reference number for this item shows in this column
9. The details of theThe chart of accounts code that the item is attached to shows here
10. The chart of accounts code allocated to the item shows in this column
11. The total owed shows in this column
12. The principal amount (the amount of the item without any interest) shows in this column
13. Any amounts paid show here
14. Any interest due shows here
15. Any interest that has already been paid shows here
16. Discount amounts (if applicable) show here
17. The total – principal plus any interest due, less any discounts shows in this column

18. The status. i.e. paid, arrears, obal (opening balance) shows here
19. The balance shows here
20. Click *Print* to print a report of the owner's ledger. See below for instructions.

## Print Ledger

You can print an owner's ledger in PDF format.

1. Click on the *Print* button
2. If this building has more than one schedule you can choose to print all schedules or use the dropdown to choose just one schedule
3. Click to select the report type you want
4. Select the date range for the report
5. The default date will be today's date. If the building is charging interest, you can alter the date to show the interest owing at the date you choose
6. Click *Generate* when you are ready. This will create a PDF document that you can print.

propertyIQ Strata

Lot/Owner

S/Plan\* 1288 Banksia Gardens 59 Albert Crescent  
 Lot 1 Unit 1 Street No  
 Street Name\* Albert Crescent  
 Suburb\* BURWOOD  
 Accessory Unit  
 UOE\* 20  
 CRN 0000000319

Owner Reports

Schedule Selection  
 Schedule: All Schedules  
 Report Type  
 Ledger Transaction Summary  
 Summary View  
 Date Range  
 From 01/10/2016 To 28/02/2017  
 Interest As At 28/02/2017  
 Generate Close

Currently Logged In as: Faye Goodman  
 Role: Administrator  
 0 137 0 20/2/2017

Corr. Method Delivery Method  
 Owner Email  
 Owner Post  
 Other Email

Lot 1 Unit 1 Anna Liu  
 Paid to 31/12/2017. Current Arrears: \$1,233.30 (Int. \$17.77) Total: \$1,251.07 Paid to 31/12/2017. In Advance: \$766.70  
 As At 28/02/2017

Date	Type	Ref#	Details	Account	Principle	Paid	Interest	Paid	Discount/W...	Total	Status	Balance
1/10/2017	Std Levy	8	Standard Levy Contribution Sc... From: 01/10/2017 To: 31/12/20...	Levy Income	Total \$515.15	\$515.15	\$0.00	\$0.00	\$0.00	\$0.00	Paid in a...	\$778.75
1/7/2017	Std Levy	7	Standard Levy Contribution Sc... From: 01/07/2017 To: 30/09/20...	Levy Income	Total \$515.15	\$515.15	\$0.00	\$0.00	\$0.00	\$0.00	Paid in a...	\$263.60
1/4/2017	Std Levy	6	Standard Levy Contribution Sc... From: 01/04/2017 To: 30/06/20...	Levy Income	Total \$515.15	\$515.15	\$0.00	\$0.00	\$0.00	\$0.00	Paid in a...	-\$251.55
28/12/2017	Spec Le...	26	Special Levy for urgent roof re...	Levy Income	Total \$416.65	\$0.00	\$3.54	\$0.00	\$0.00	\$420.19	Arrears	-\$766.70

Printing Labels Bulk SMS + Add View

PropertyIQ Strata Testing  
 PO Box 330 CANNING VALE WA 2000 ABN: 123456789  
 Ph: 1300 724 256 Email: stephanieb@propertyiq.com.au  
 Printed: 28/02/2017 03:00 pm User: Faye Goodman Page 1

**OWNER LEDGER from 01/10/16 to 28/02/17**  
**All Schedules**

S/Plan: 1288 Units: 4 Lots: 4  
 Building Address: 59 Albert Crescent  
 Suburb: BURWOOD State: NSW Post Code: 2014  
 Building Name: Banksia Gardens  
 GST?: No ABN:  
 Manager: Training Manager

Lot 1	Unit 1	Anna Liu	Date	Ref	Details	Debit	Credit	Balance
			01/10/16		Opening Balance			\$0.00
	1		01/10/16	1	General Levy From: 01/10/2016 To: 31/12/2016	\$500.00		\$500.00 DR
	22		28/11/16	22	Special Levy for urgent roof repairs (Instalment 1)	\$416.65		\$916.65 DR
					Interest Due	\$10.50		
	3		02/12/16	3	Receipt; Standard Levy Contribution Schedule for 01/04/2017 to 30/06/2017		\$515.15	\$401.50 DR

## NOTES TAB

You can record any notes about the owner here.

- Existing notes show here
- Click **+ Add Note** to add a new note
- Give the note a short name, the name shows in the notes tab here and also on the reminder if you set one
- Type the details of the note here
- The status defaults to pending. You can alter to completed if you just want to store a record
- If the notice is pending, you can click on the date to set a reminder date and time
- Click **Save** to save the note
- You can click to view any existing note by clicking on the **View Note** button
- Click on the **Print** button to print the notes. This will create a PDF that you can print.

## Printed Notes

**PropertyIQ Strata Testing**  
 PO Box 330 CANNING VALE WA 2000 ABN: 123456789  
 Ph: 1300 724 256 Email: stephanieb@propertyiq.com.au  
 Printed: 28/02/2017 03:21 pm User: Faye Goodman

Page 1

### Notes Report

#### 1288 1/1 Anna Liu

Name	Details	Status	Reminder Time
Owner requested mediation session with Lot 4	Owner has requested a mediation session with lot owner 4, States that lot 4 is a making alot of noise late at night	pending	26/02/2017 01:00 pm
Mediation session scheduled	Mediation session is scheduled for 21.3.2017	pending	19/03/2017 10:20 pm

## DOCUMENTS TAB

The documents tab stores all documents relating to this lot that have either been generated by the program or uploaded manually.

1. You can select a date range to view all documents within that range
2. The default view includes all types of documents, but you can use the dropdown list to select a specific type of document
3. Click on the box at the left to select a document. You can view the document details here
4. The created time shows in this column
5. The date the document was uploaded/created shows here
6. The user that created/uploaded the document shows in this column
7. The name of the document shows in this column
8. The type of document shows in this column
9. The document details show in this column. If the document is a levy/fee notice, the end date shows here.
10. If the document is on the Owners portal it has a green tick in this column, a red cross if not. For full details on the owner's portal see the manual "Owners Portal"
11. Click on the **+Document Entry** button to upload a document – see instructions below
12. Click on the **View Doc** button to view a document you have selected
13. Click on the **Email** button to email the document(s) you have selected
14. Click on the **Print** button to print the document in PDF format
15. Click on the **Download** button to download a copy of the document
16. Click **Delete** to delete a document you have selected

C.T.S.\*

270976 Moorings on Cavill 63 Cavill Avenue

Lot\*

3

Unit\*

3

Street No\*

63

Street Name\*

Cavill Avenue

Suburb\*

SURFERS PARADISE

Accessory Unit

UOE\*

40

Interest Entitlement\*

CRN

0000000338

Owner Info

Owner Name\*

Boltech Pty Ltd

(Ah)

(Bh)

Mobile

0411 232 242

Fax

Committee Member: N

Email

mystratacustomers@gmail.com

Salutation

Contact Name

Justin Morgan

Paid to

30/11/2016

Last Settled

Committee Member Status:

Resigned

Contact

Info

Delivery

Settings

Ledger

Notes

Documents

Alerts

SMS

Emails

Log of Changes

From

01/11/2017

To

18/09/2018

Filter:

All

	Created Time	Date	User	Name	Type	Details	On Portal
<input checked="" type="checkbox"/>	21/08/2018 - 2:13 pm		Bella Carstairs	Lot 3 - Due Notice - 21-08-2018.pdf	Levy Notice	Posted to: PO Box 20 BROADBEACH QLD 4217	✗
<input type="checkbox"/>	23/07/2018 - 11:59 am	23/7/2018	Bella Carstairs	Lot 3 Notice of AGM - 29/08/2018.pdf	Meeting Notice	Generated by Meeting Notice Generator Emailed to: mystrataclients@gmail.com on: 23/07/2018... Uploaded to Bing on 23/07/2018 12:12 pm	✗
<input type="checkbox"/>	23/07/2018 - 11:54 am		Bella Carstairs	Lot 3 - Due Notice - 23-07-2018.pdf	Levy Notice	Uploaded to Bing on 23/07/2018 12:06 pm PO Box 20 BROADBEACH QLD 4217	✗
<input type="checkbox"/>	19/07/2018 - 12:31 pm		Bella Carstairs	Lot 3 - Legal Notice - 19-07-2018.pdf	Levy Notice	Posted to: PO Box 20 BROADBEACH QLD 4217	✗
<input type="checkbox"/>	18/07/2018 - 12:07 pm		inhntest	Lot 3 - Due Notice - 18-07-2018.pdf	Levy Notice	Posted to: PO Box 20 BROADBEACH QLD 4217	✗

1 document selected

+ Document Entry

View Doc

Email

Print

Download

Delete

Save

Cancel

## DOCUMENT ENTRY

You can upload documents in the following formats:

- PDF
- Images in .jpeg, .tiff and .bmp format
- Word
- Excel Spreadsheets
- Text File
- Email Files

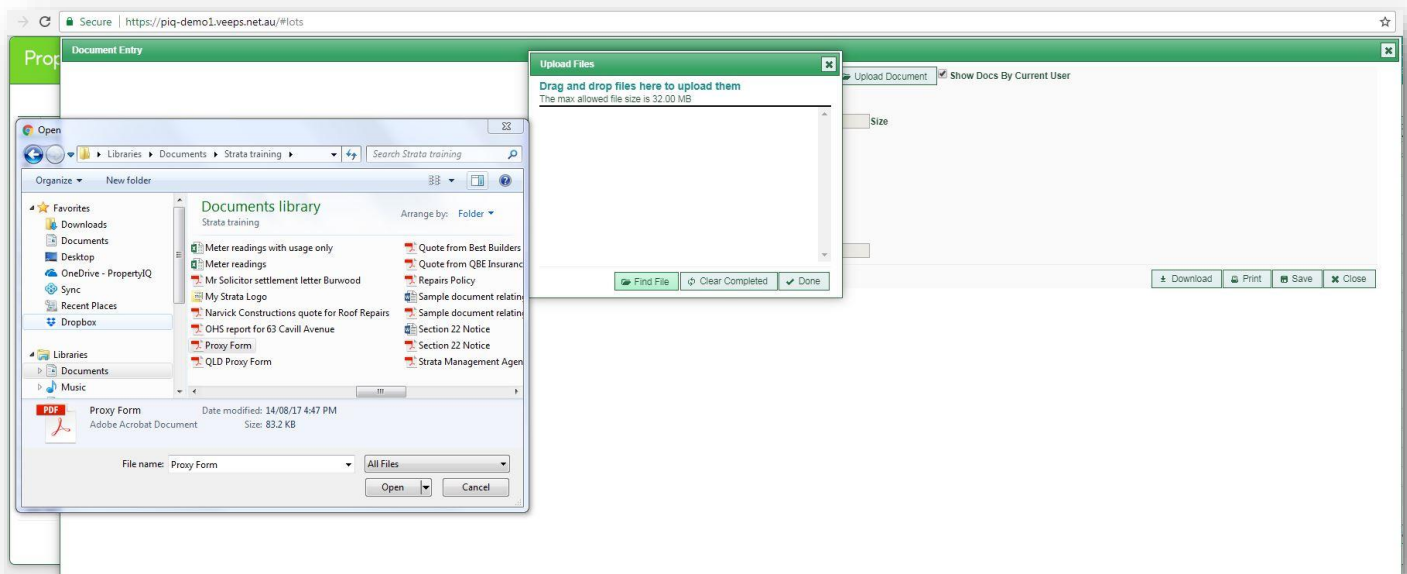
Only PDF Documents will show as a preview.

1. Click on *+Document Entry*. The document entry screen now pops up
2. Click on Upload Document

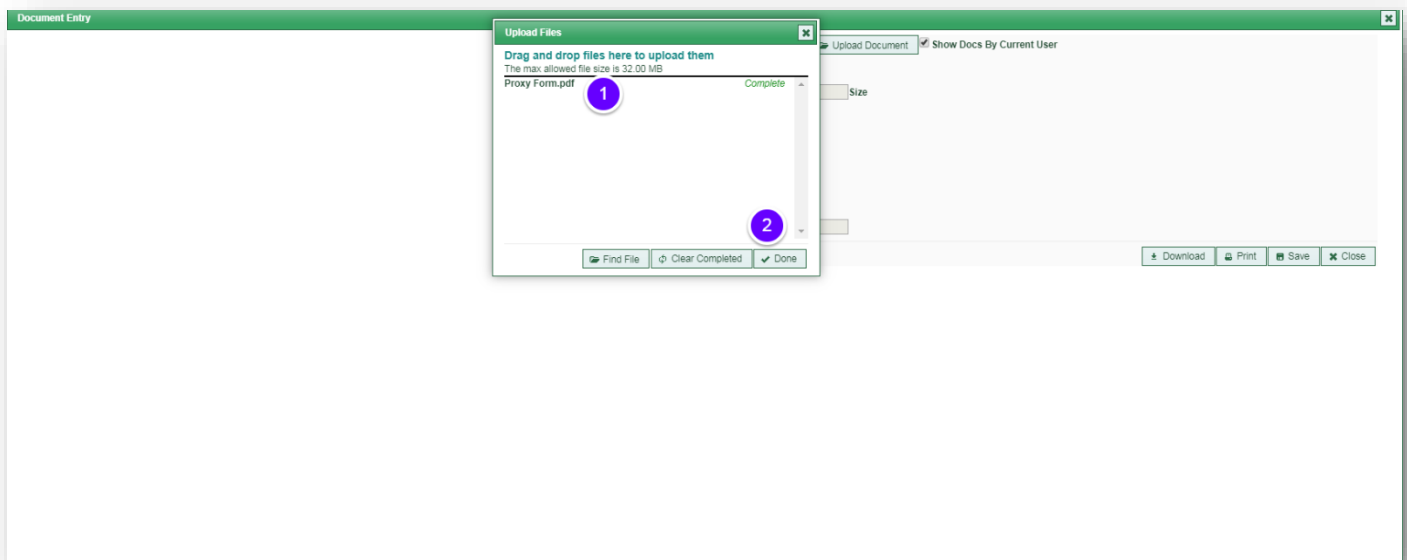
The screenshot shows a web application interface for document entry. At the top, there's a green header bar with the title 'Document Entry'. Below it, a form is displayed with fields for Date, Name, C.T.S., Schedule, Lot, Supplier, Document Type, and Comments. A 'Show Docs By Current User' checkbox is also present. A '2' in a purple circle highlights the 'Upload Document' button. Below the form, there's a table with columns for Date, Name, C.T.S., Schedule, Lot, Supplier, Document Type, and Comments. A '1' in a purple circle highlights the 'Document Entry' button in the table's footer. The table contains two rows of data, both with red 'X' icons in the last column. The first row is for a 'Meeting Notice' and the second row is for an 'Email Notice'.

Date	Name	C.T.S.	Schedule	Lot	Supplier	Document Type	Comments
23/11/2017 - 11:40 am	Trainee1	Lot 1 Notice of AGM - 29/11/2017.pdf	Meeting Notice	Generated by Meeting Notice Generator Posted to: 1 Smith Street SYDNEY NSW 2000 Emailed to: edwardmc@gmail.com on: 23/11/2017 10:...			
16/11/2017 - 12:35 pm	ams	Lot 1 - 1 Email Notice - 16-11-2017.pdf	Email Notice	Emailed by: mihika@innomarketing.com.au on: 16/11/2017			

You can either drag and drop files from your computer or click *Find File* and select the file you want.



1. The document(s) you have selected will show here
2. Click *Done* when you have finished selecting documents



## Emailing documents

1. The documents you selected show here
2. The total size of the documents you selected shows here
3. Click the boxes to select the recipient(s) you want to send the documents to
4. Click here and then type a manual email address if you want to send the document to a different email address
5. Click here and then type a manual email address if you want to BCC to a different email address
6. Type an email subject here
7. Type the email body here
8. Click *Email Documents* when you are ready to send.

The screenshot shows a software window titled "Emailing Documents". It contains several sections: "Documents To Be Emailed:" with a list of two PDF files (Lot 1 - Special Notice and Lot 1 - Arrears Notice) and their sizes; "Total Attachments Size: 88.27 KB"; "Delivery Options" with checkboxes for "Owner Email", "General Correspondence Email", "Nominees Email", "Managing Agent Email", "Mortgagees Email", "Tenant Email", and "Levy Recipient Email"; "Manual Delivery" with checkboxes for "Manual Email" and "Manual Bcc Email", each followed by a text input field; "Email Settings" with "Email Subject:" and "Email Body:" text input fields. Numbered callouts (1-8) point to specific elements: 1 points to the document list, 2 to the total size, 3 to the delivery options checkboxes, 4 to the manual email checkbox, 5 to the manual Bcc email checkbox, 6 to the email subject field, 7 to the email body field, and 8 to the "Email Document(s)" button at the bottom.

## Print Documents

The print documents button creates a PDF that you can print

The screenshot shows a printed document titled "Tax Invoice". It includes contact information for "PropertyIQ Strata Trading" in the top right corner. The invoice is addressed to "Anna Liu" at "1/59 Albert Crescent, BURWOOD NSW 2088". The subject is "SPECIAL LEVY NOTICE" under the "Strata Schemes Management Act 1996". The notice is dated 28/11/2016 and relates to "Banksia Gardens Strata Plan 1288, Lot 1, 59 Albert Crescent, BURWOOD NSW 2014." The body of the notice states that a special levy has been determined for urgent roof repairs. At the bottom, there is a table with two rows: "Admin Fund: \$0.00" and "Sinking Fund: \$416.65".



## ALERTS TAB

PropertyIQ Strata allows you to set alerts in a number of areas that can either warn you or stop you from continuing with a task once the alert is triggered. You can create an alert about anything you want. Alerts relating to Lot owners sit in the alerts tab here.

1. Any existing alerts will show here. You can either click and then double click on the alert or click to highlight and click *View* at the bottom of the screen
2. Click *+Add* to add a new alert
3. Type the details of the alert here
4. The alert will be active by default, but you can deactivate later if you want. If you tick the box *Don't allow operator to continue after alert is shown*, it will prevent you from completing the task once the alert is triggered.
5. Select the context you want to trigger the alert. You can only have one active alert for each context for each lot owner, IE. This owner already has an active alert triggered by opening the lot owner card, so you can't add another in that context.
6. Select the icon you want to use for this alert.
7. Click test alert if you want to see how the alert will look
8. Click *Save* to save the alert

The screenshot displays the 'Lot Owner' management interface. The top section contains owner details for Anna Liu. Below this is a tabbed interface with 'Alerts' selected. A table lists existing alerts, with one alert highlighted: 'Owner in mediation with Lot 4'. A purple arrow points from the '+ Add' button at the bottom of the table to the 'Alert' dialog box. The dialog box is open, showing a text input field with the message 'Use caution if repairs are requested by this Lot Owner'. Below the text field are checkboxes for 'Active', 'Don't allow operator to continue after alert is shown', 'Lot Card', 'Work Orders', and 'Supplier Transactions'. To the right of these checkboxes is a grid of icons for selection. At the bottom of the dialog are buttons for 'Test Alert', 'Save', and 'Cancel'.

## SMS TAB

SMS is an additional service you can add to your subscription. For more information, see the manual "SMS"

## EMAILS TAB

The Emails tab shows all outgoing emails that have been sent to the lot owner from the program

### VIEWING OUTGOING EMAILS FOR A LOT OWNER FROM THE LOT OWNER CARD - EMAILS TAB

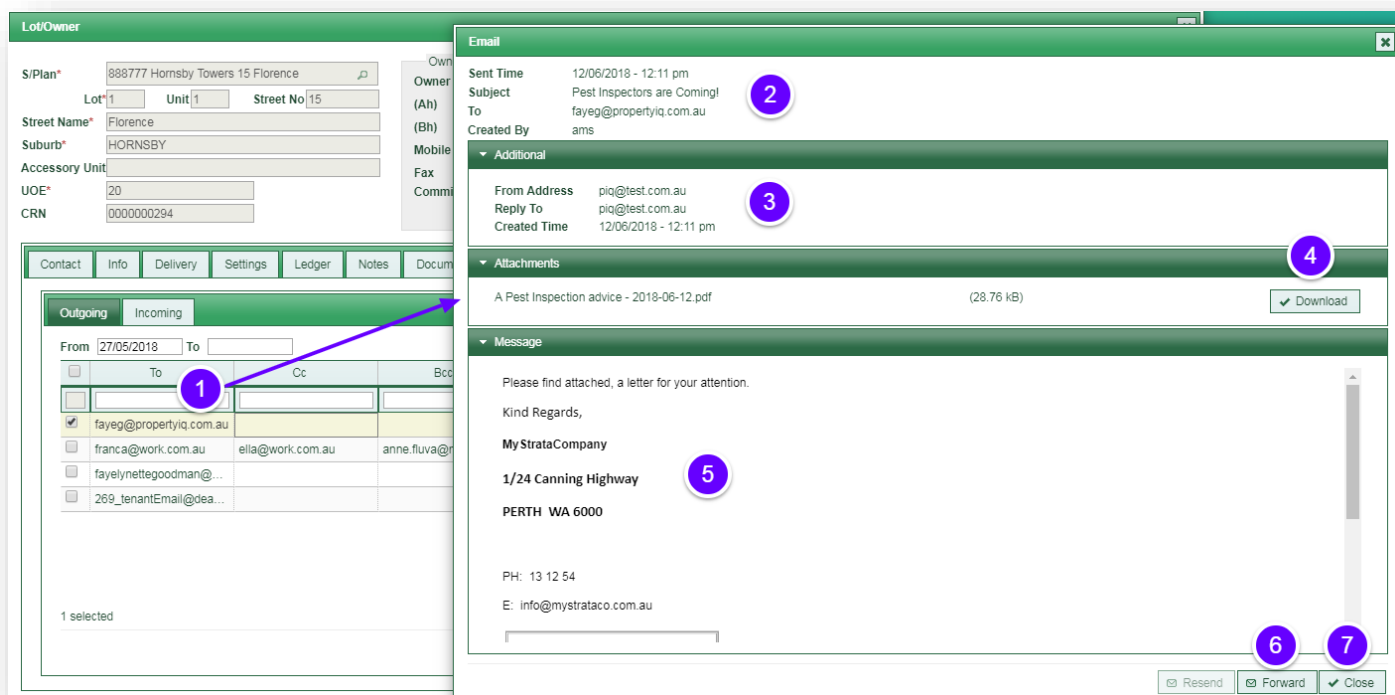
1. The default view is the outgoing emails tab, you can click on the *Incoming* tab to view incoming emails.
2. The default view is for the past month, but you can click on the boxes to open the calendar and refine your view
3. The default view is sent emails, but you can toggle between tabs to view emails with all statuses or the error tab to view emails with errored status
4. Click on a column heading to sort by that column
5. Type some key letters in any of the empty boxes on the top line to refine your search
6. Click on an item to highlight it on the screen and then double click to select it *or*
7. Click the *View* button on the bottom of the screen

The screenshot shows the 'Lot Owner' window with the 'Emails' tab selected. The interface includes a top navigation bar with tabs like Contact, Info, Delivery, Settings, Ledger, Notes, Documents, Alerts, SMS, Emails, and Log of Changes. Below this is a sub-navigation bar with 'Outgoing' and 'Incoming' tabs. The main area displays a table of outgoing emails. Numbered callouts indicate key features: 1 points to the 'Emails' tab; 2 points to the date range filters (From: 04/09/2017, To: 17/04/2018); 3 points to the status filters (All, Sent, Error); 4 points to the column headers (To, Cc, Bcc, Subject, Status, Created By, Sent, Created); 5 points to the 'Subject' column header; 6 points to an email entry in the table; and 7 points to the 'View' button at the bottom right. The table shows one email sent to 'anna@gmail.com' with the subject 'Meeting Notice'.

	To	Cc	Bcc	Subject	Status	Created By	Sent	Created
<input checked="" type="checkbox"/>	anna@gmail.com			Meeting Notice	Sent	ams	13/04/2018 - 12:03 pm	13/04/2018 - 12:03 pm

## VIEWING AN INDIVIDUAL OUTGOING EMAIL FROM THE LOT OWNER CARD

1. Click on the email you want to view, to highlight it, and then double click to select it
2. The sent details show here
3. The additional tab shows the address the email was sent from, created time and reply to email
4. Attachments show here. Click on the *Download* button to download an attachment
5. The body of the email shows here
6. Click *Forward* to forward the email
7. Click *Close* to close the window



## FORWARDING AN EMAIL FROM THE LOT OWNERS CARD – EMAILS TAB

1. Type the email address you want to send the email to here (required)
2. Type an email address to cc to (optional)
3. Type an email address to bcc (optional)
4. The original subject line shows here but you can overtype with a new subject if you want to
5. Type the text you want to show in the forwarded email here
6. Click *Forward* to send the email
7. Click *Cancel* to cancel forwarding

Forward Email

To\*

liafernance@hotmail.com

1

Cc

ellab@borensons.com.au

2

Bcc

anne.fluva@mystrataco.com.au

3

Subject\*

FWD: Pest Inspectors are Coming!

4

Message Prefix

Hello Lia

Here is the original letter advising that the pest inspectors are coming.

5

----- Forwarded message -----  
From: piq@test.com.au  
Sent: 12/06/2018 - 12:11 pm  
To: fayeg@propertyiq.com.au  
Subject: Pest Inspectors are Coming!

Original Message

Please find attached, a letter for your attention.

Kind Regards,

MyStrataCompany

6

1/24 Canning Highway

PERTH WA 6000

PH: 13 12 54

E: info@mystrataco.com.au

All original attachments will be included when forwarding the email.

7

8

Forward

Cancel

## LOG OF CHANGES

The Log of Changes Tab records all changes that have been made to the lot owner's card.

Click on the + sign to view full details

Contact	Info	Delivery	Settings	Ledger	Notes	Documents	Alerts	SMS	Log of Changes
Action			User			Time			
Update			Faye Goodman			06/12/2016 - 1:39 pm			
Column: paidTo			Value Before: null			Value After: 2017-12-31			
creation			Training Manager			22/11/2016 - 1:59 pm			

[Lot Owner Page](#)
[Email](#)
[Info Certificate](#)
[Last Info Certificate](#)
[Edit](#)
[Done](#)

## OTHER FUNCTIONS ON THE LOT OWNERS CARD

### THE CHANGE OWNER BUTTON

1. Click on the *Change Owner* button from the Lot owner Card
2. If the new owner of this lot already owns another lot in your database and you want to link them, click on *Select Lot Owner to Link to* and search for the lot owner you want to link to
3. Complete the new owner details here
4. Complete the new owner address details here
5. Type the date the sale settled here
6. If there is a new property manager for this lot click on the search icon to find the new property manager if they are already recorded on the program or to add a new one to the program
7. If the existing lot owner is a committee member, you can click here to select whether they will stay on the committee or not.
8. Click *Save* when done.

S/Plan\*

1288 Banksia Gardens 59 Albert Crescent

Lot\*

1

Unit\*

1

Street No\*

59

Street Name\*

Albert Crescent

Suburb\*

BURWOOD

Accessory Unit\*

UOE\*

20

CRN\*

0000000319

Owner Info

Owner Name\*

Anna Liu

(Ah)

(Bh)

Mobile

Fax

Email

mystrataclients@gmail.com

Salutation

Contact Name

Paid to

31/12/2017

Last Settled

Committee Member: Y

Committee Member Status: Active

Change Owner

Change Owner

This is for changing the owner on a lot. If you want to update the details for the current owner, you should do that by clicking 'Edit' on the lot.

Select an existing lot owner as the new owner for this lot, which will also link these lot owners together.

Select Lot To Link To

Or Enter the new owners details below

Owner Details

Owner Name\*

Joshua Harkins

(Ah)

02 7564565

(Bh)

02 8787 4545

Mobile

0412 473 874

Email

joshh@hotmail.com

Salutation

Mr

Fact Name

Joshua Harkins

Fax

Owner Address

Mailing Address\*

Po Box 271

Suburb

BURWOOD

State

NSW

PI Code

2009

Other

Settlement Date

29/02/2017

Property Manager

If no property manager is selected, saving will clear the existing manager.

The current owner is an active committee member.

Do you want to leave the current owner on the committee? \* Yes No

Save

Cancel

1. Click on the *Lot Owner Page* button to create a PDF that you can print, showing all the owner information.

**PropertyIQ Strata Testing**  
 PO Box 330 CANNING VALE WA 2000 ABN: 123456789  
 Ph: 1300 724 256 Email: stephanieb@propertyiq.com.au  
 Printed: 01/03/2017 08:45 am User: Faye Goodman Page 1

**Strata Roll of Owners for Strata Plan Number 434544333**  
**Hornsby Towers**  
**Owner Page**

---

**S/Plan** 434544333  
**Building Address:** 15 Florence **Units:** 13 **Lots:** 13  
**Suburb:** HORNSBY **State:** NSW **Post Code:** 2077  
**Building Name:** Hornsby Towers **ABN:** 123434354  
**GST:** No **Manager:** Training Manager

---

**Lot:** 1 **Unit:** 1 **Last Settled:**  
**Unit of Entitlement:** 20 / 220  
**Owner Name:** Franca Swindells  
**Salutation:**

**Phone:**  
**Fax:**  
**Mobile:** 0423 324 343  
**Email:** fayelynetgoodman@gmail.com

## EMAIL BUTTON

1. Click on the *Email* button to email the lot owner

**Lot/Owner**

**S/Plan\*** 434544333 Hornsby Towers 15 Florence

**Lot\*** 1 **Unit\*** 1 **Street No\*** 15

**Street Name\*** Florence

**Suburb\*** HORNSBY

**Accessory Unit**

**UOE\*** 20

**CRN** 0000000294

**Owner Info**

**Owner Name\*** Franca Swindells

(Ah)  **Email** fayelynetgoodman@gmail.com

(Bh)  **Salutation**

**Mobile** 0423 324 343 **Contact Name**

**Fax**  **Paid to**  **Last Settled**

**Committee Member:** Y **Committee Member Status:** Active

**Contact** Info Delivery Settings Ledger Notes Documents Alerts SMS Log of Changes

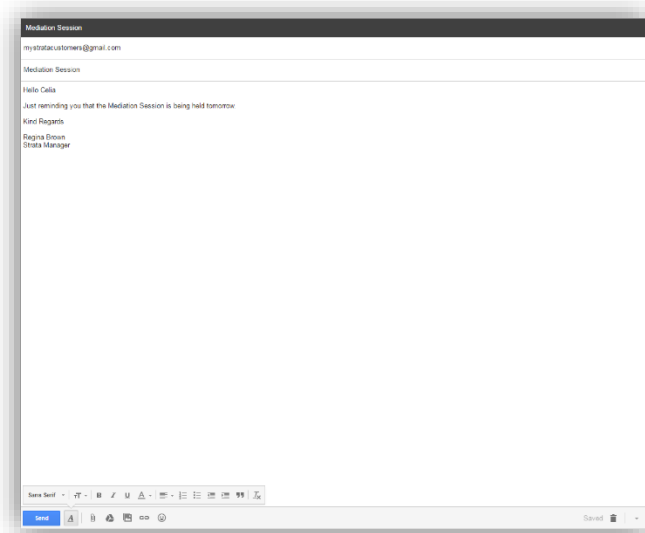
Owner Address  Residence Address

Joint Owner  Power of Attorney

Tenancy Details

**1**

This will open your email account. Type your message and click *Send* when done.



These emails are sent from your local email account (e.g. Outlook on your computer) and will show in the sent items of your email account. You can move them into PropertyIQ Strata using the incoming emails function. For details, see the manual “Incoming and Outgoing Emails”

## INFO CERTIFICATE AND LAST INFO CERTIFICATE BUTTONS

Click here to generate an Information Certificate or view the last Information Certificate if one has been created previously. Information Certificates vary throughout Australia. For full details see the manual “Information Certificates” for your relevant State/Territory.

Contact	Info	Delivery	Settings	Ledger	Notes	Documents	Alerts	SMS	Emails	Log of Changes	
Owner Address						Legal Residence Address					
Joint Owner						Power of Attorney					
Tenancy Details											

[Lot Owner Page](#)
[Email](#)
[Info Certificate](#)
[Last Info Certificate](#)
[Edit](#)
[Done](#)

## EDIT BUTTON

Click on the *Edit* button to enable edit mode and edit the lot owners card.

**LotOwner**

S/Plan\* 434544333 Hornsby Towers 15 Florence

Lot 1 Unit 1 Street No 15

Street Name\* Florence

Suburb\* HORNSBY

Accessory Unit

UOE\* 20

CRN 0000000294

**Owner Info**

Owner Name\* Franca Swindells

(Ah) Email fayelynettegoodman@gmail.com

(Bh) Salutation

Mobile 0423 324 343 Contact Name

Fax Paid to Last Settled

Committee Member: Y Committee Member Status: Active

[Change Owner](#)

Contact	Info	Delivery	Settings	Ledger	Notes	Documents	Alerts	SMS	Log of Changes	
Owner Address						Residence Address				
Joint Owner						Power of Attorney				
Tenancy Details										

[Lot Owner Page](#)
[Email](#)
[Info Certificate](#)
[Last Info Certificate](#)
[Edit](#)
[Done](#)