PropertyIQ

Lot owners and the lot owners card

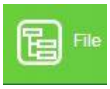
TABLE OF CONTENTS

Introduction to the Lot/Owners Card 1
Getting Started 1
Adding new lot owners 2
Lot owner details and contact tab 3
Tenant Accordion 4
Adding a new property manager 5
Info Tab 8
Delivery Tab 10
Settings Tab 13
Ledger Tab 16
Notes Tab 19
Documents Tab 20
Document Entry 21
Alerts Tab 24
SMS Tab 24
Emails Tab 25
Viewing outgoing emails for a Lot Owner from the Lot owner card - Emails tab 25
Viewing an individual outgoing email from the lot owner card 26
Forwarding an email from the Lot Owners Card – Emails Tab 26
Log of Changes 28
Other functions on the Lot Owners Card 28
The Change Owner Button 28
Print Lot Owners Page 29
Email button 29
Info Certificate and Last Info Certificate buttons 30
Edit Button 30

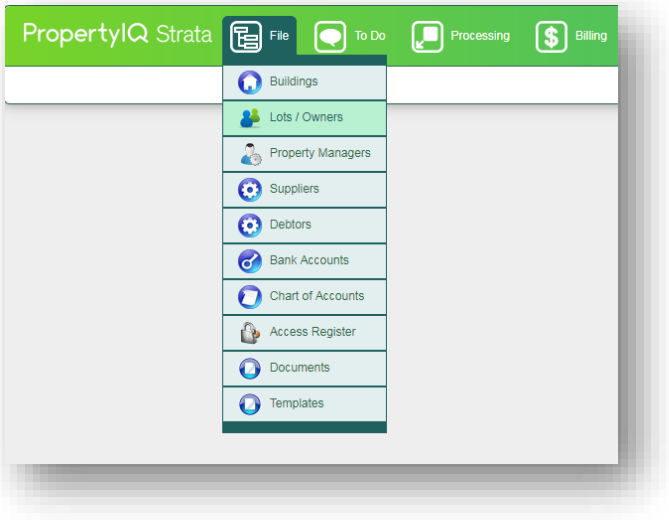
INTRODUCTION TO THE LOT/OWNERS CARD

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

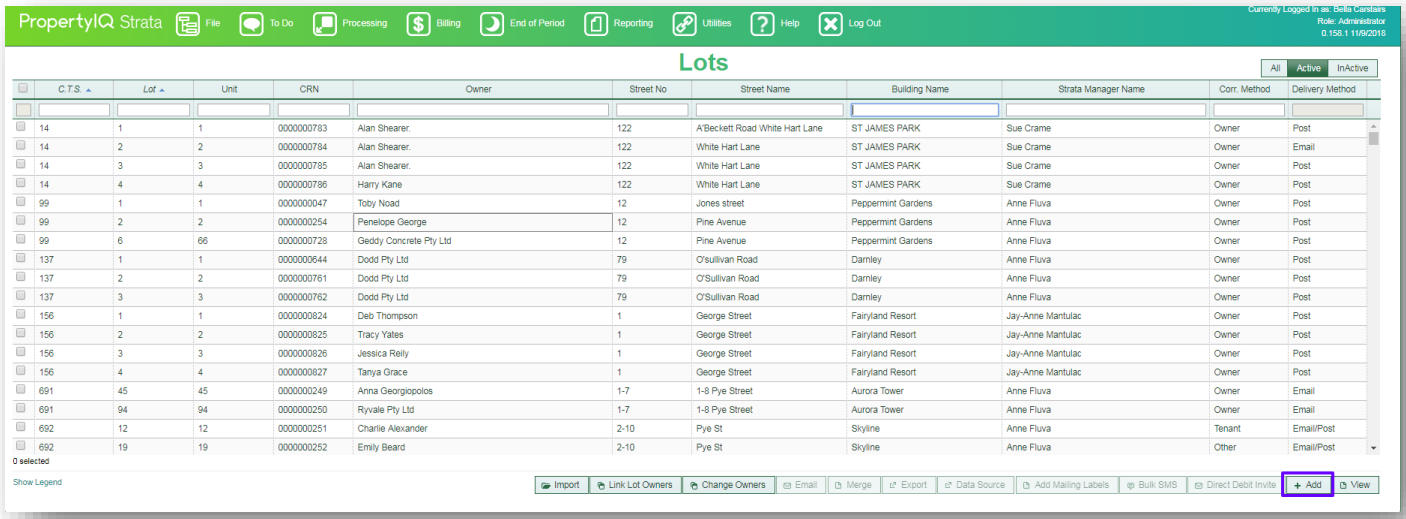
To Get Started, go to the 

menu and click on Lots/Owners

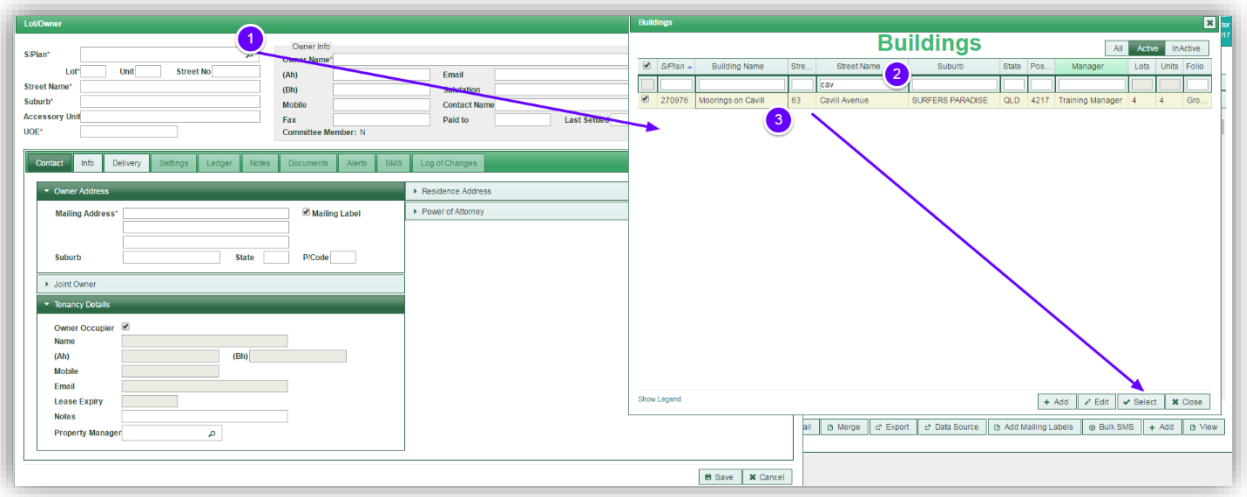


ADDING NEW LOT OWNERS

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

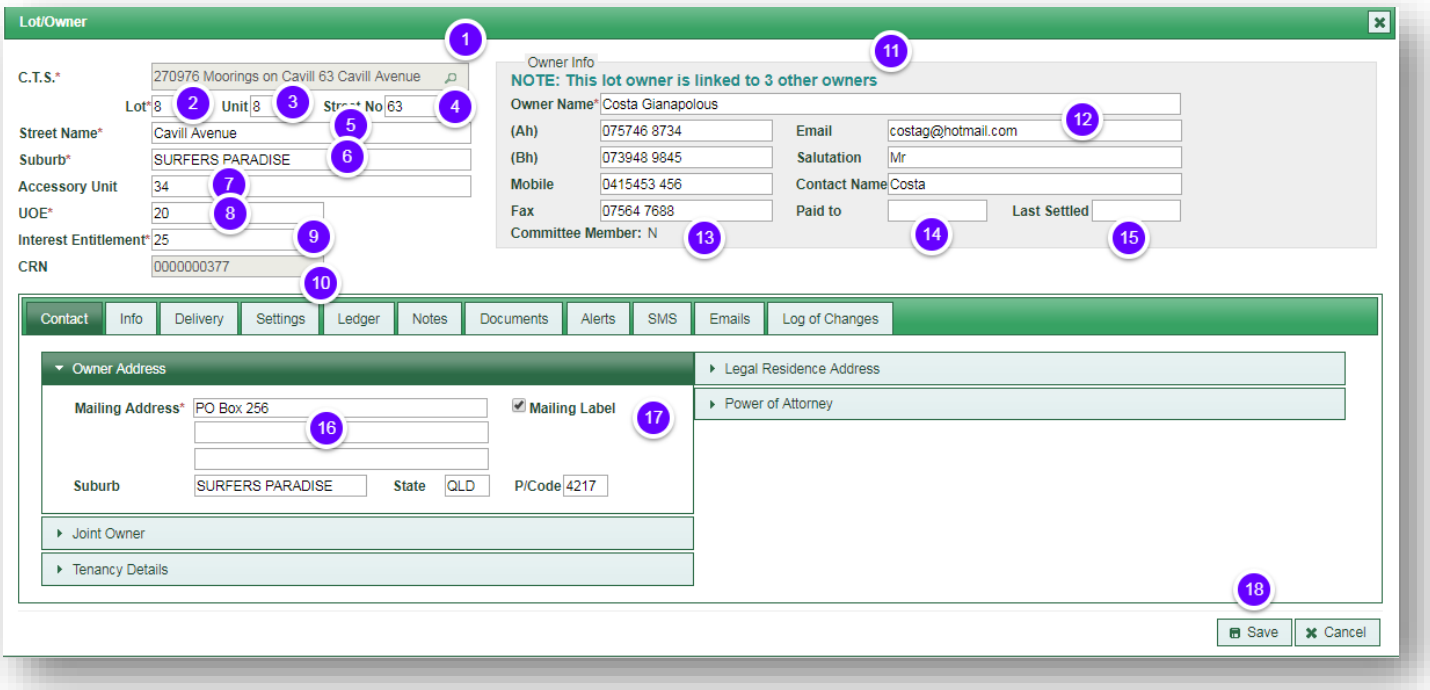


1. Click on the search icon to find the building you want to add lot owners to
2. Type some key letters in any of the boxes on the top line to refine your search and find the building you are looking for.
3. Click on the building, to highlight it
4. Click on *Select* to select the building (or double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



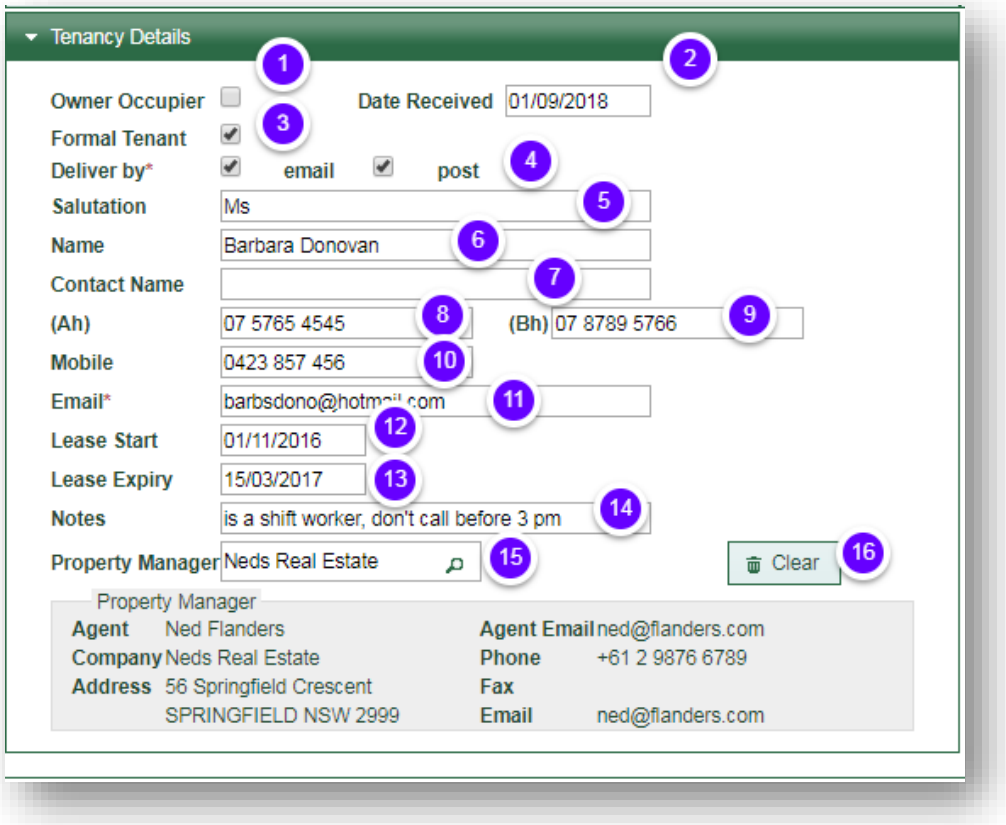
NOTE In this example, the building the lot is being created for is located in Queensland. There are some differences to the terminology in other states.

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

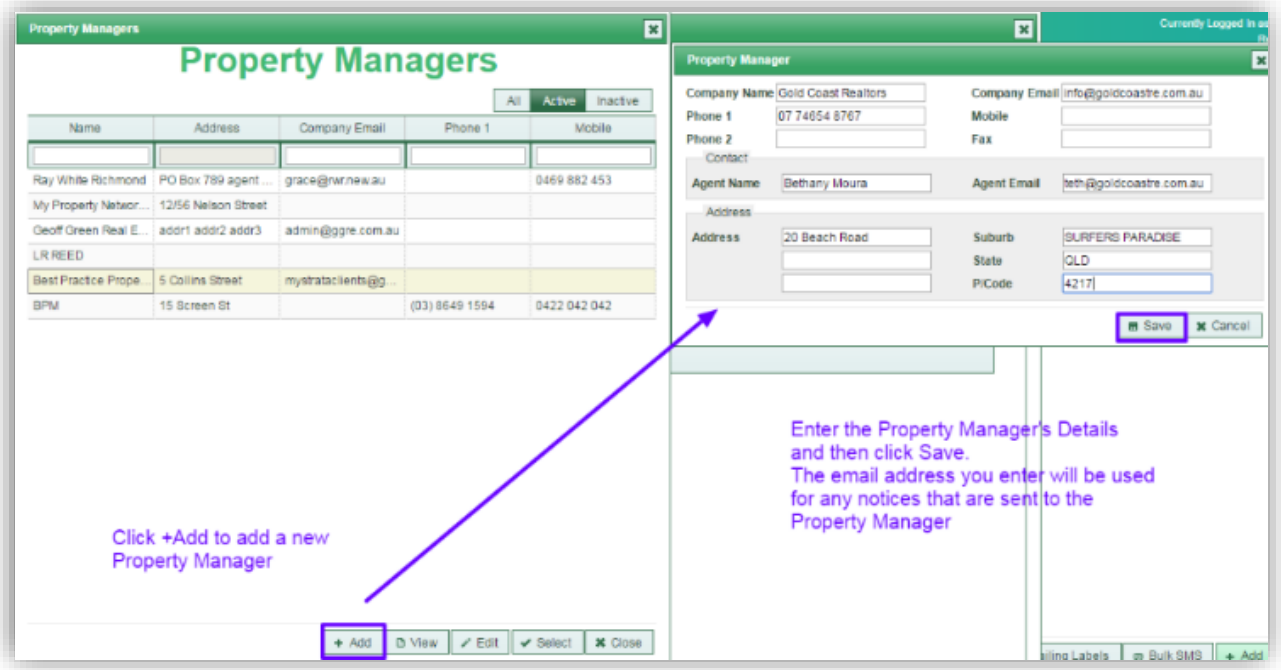


Tenant Accordion

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



ADDING A NEW PROPERTY MANAGER

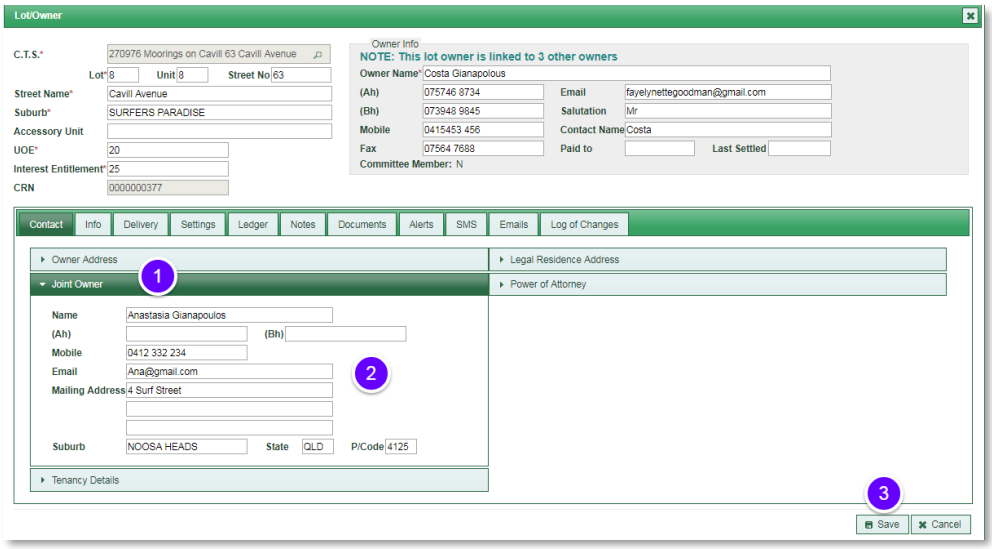


Joint Owner

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.

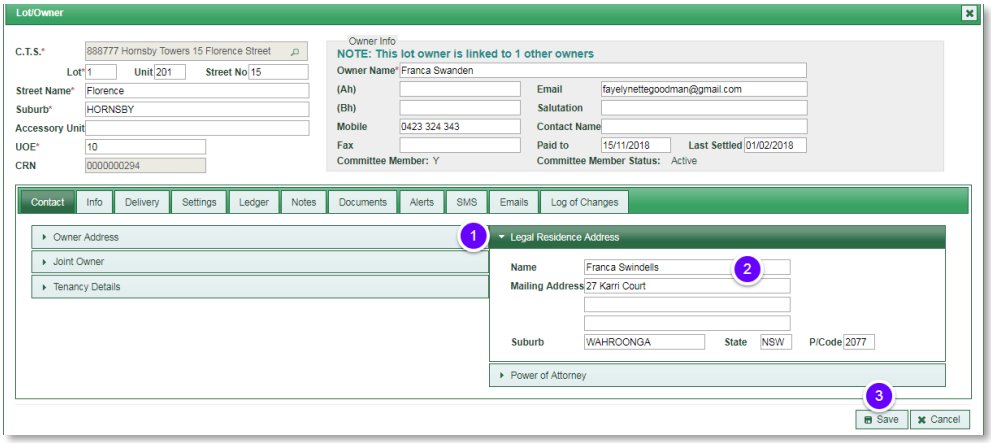
1. Click on the little white arrow next to the Joint Owner accordion to open it
2. Type the joint owners contact details here. The details you enter here will be only used for any notices you send to the joint owner
3. Click save to save your changes.



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.

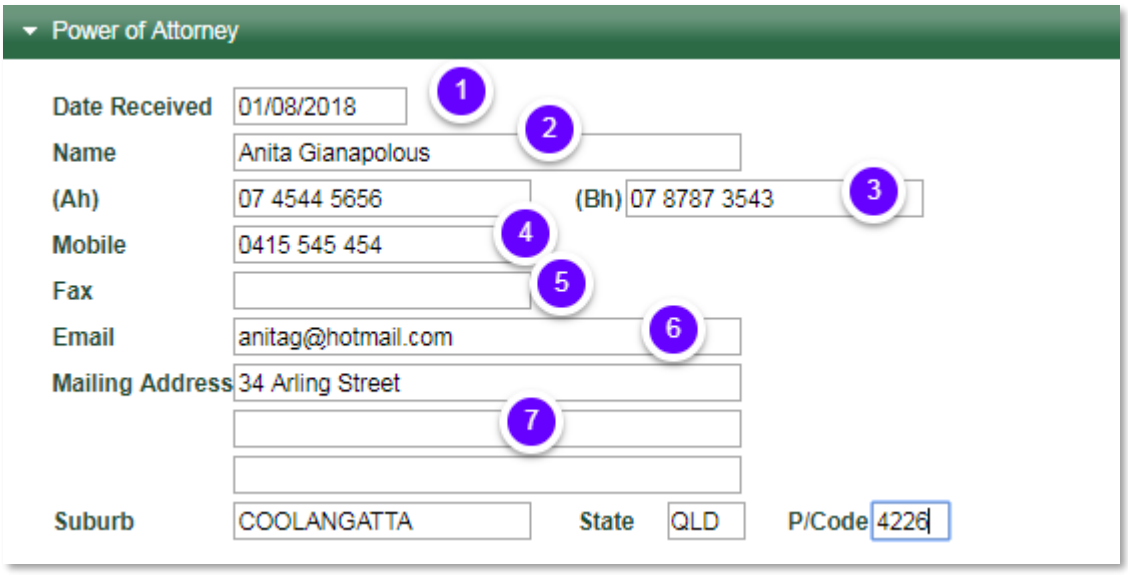
1. Click on the little white arrow to open the residence address accordion
2. Type the details
3. Click *Save* to save your changes



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.

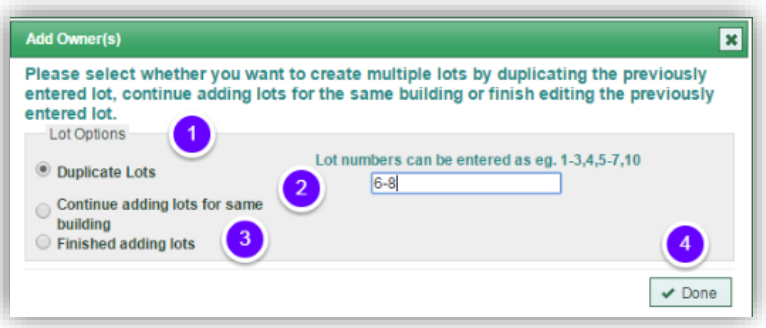
1. Enter the date the information was received here
2. Enter the Power of Attorney's name here
3. Enter any after hours and business hours numbers here
4. Enter a mobile number here
5. Enter a fax number here
6. Enter an email address here
7. Enter a mailing address here



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.

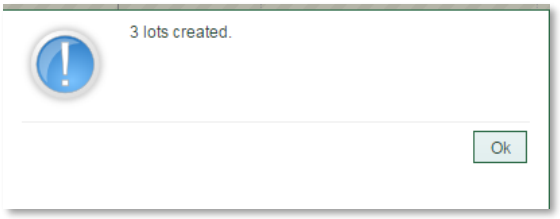
When you save a new lot owner, you will see the following options:

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 diferent owners
3. Click on *Finished adding lots* when have finished adding lots for this building
4. Click *Done* when you have finished adding lots.



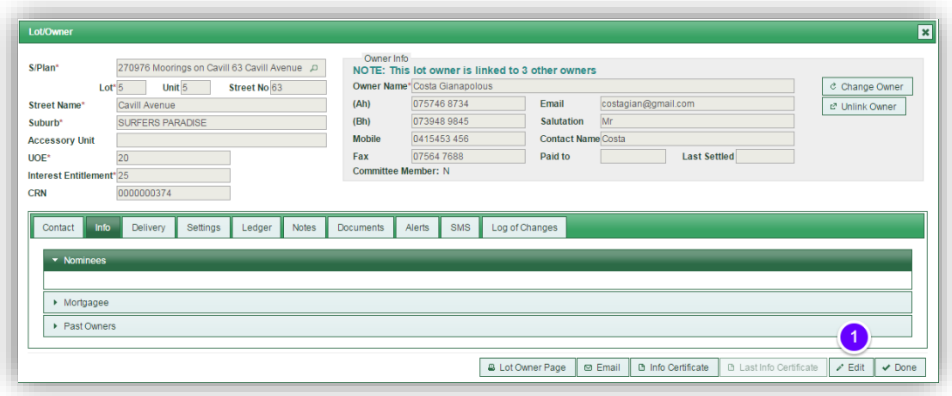
If you select to Duplicate Lots you will see this message once they are created.

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

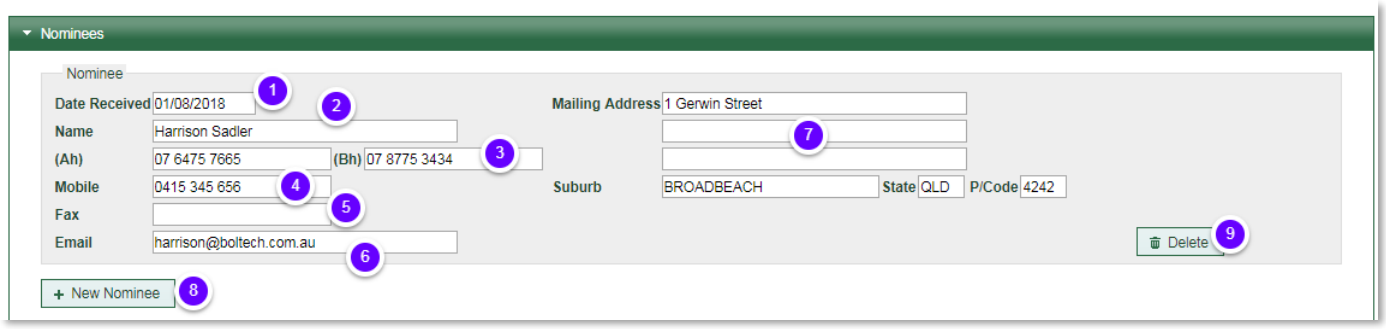
1. If you have saved the lot owner card earlier, click on *Edit* to get started.



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

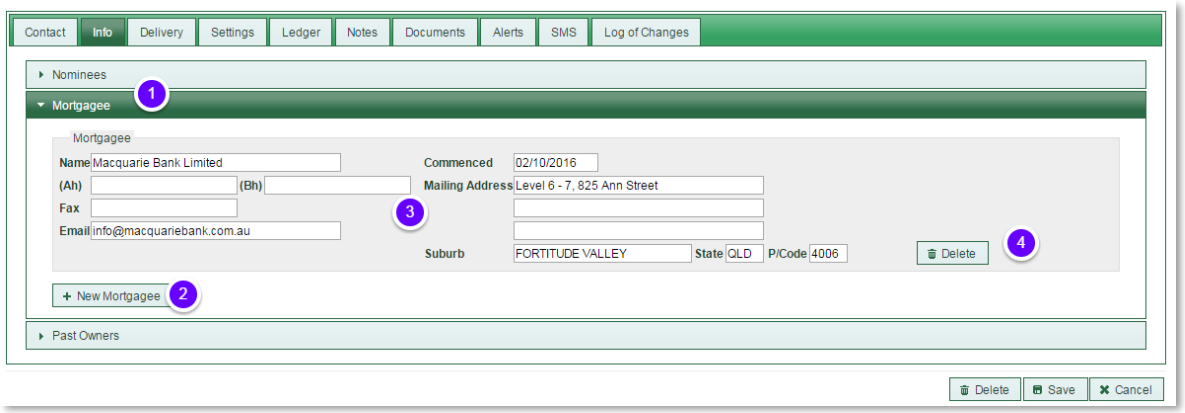


The Mortgagee Accordion

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

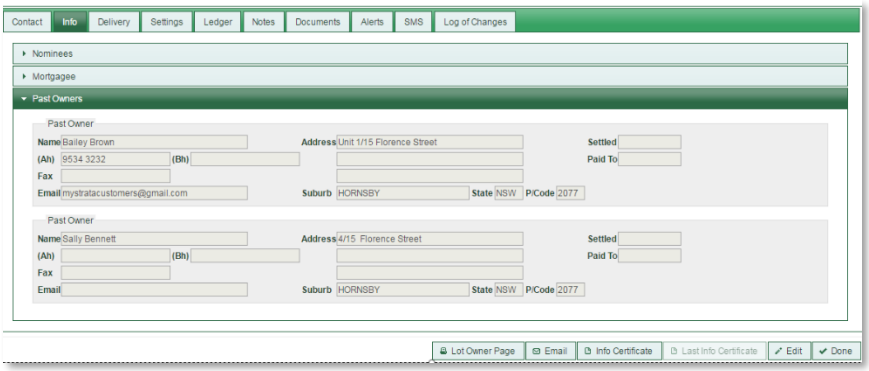
1. Click on the little white arrow next to the mortgagee accordion to open the accordion
2. Click on the + *New Mortgagee* button
3. Type the details of the mortgagee
4. You can delete a mortgagee by clicking here.

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



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.



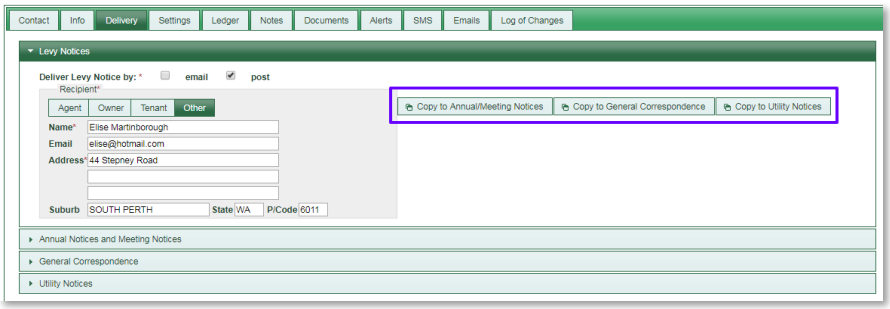
DELIVERY TAB

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

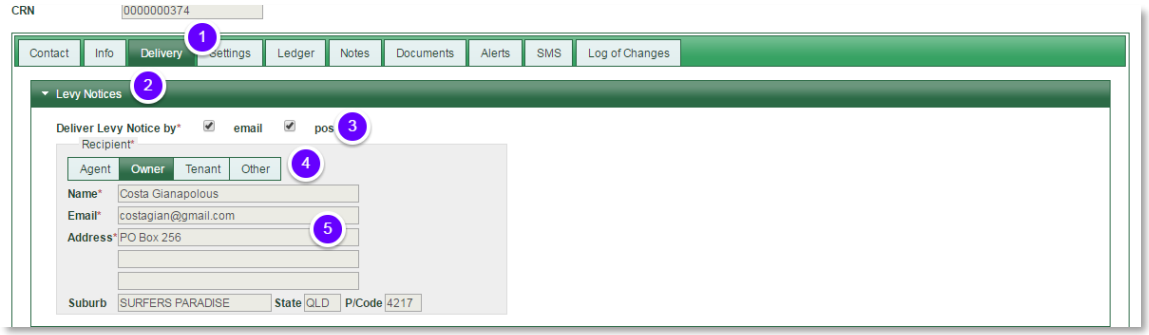
Levy Notices Accordion

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.



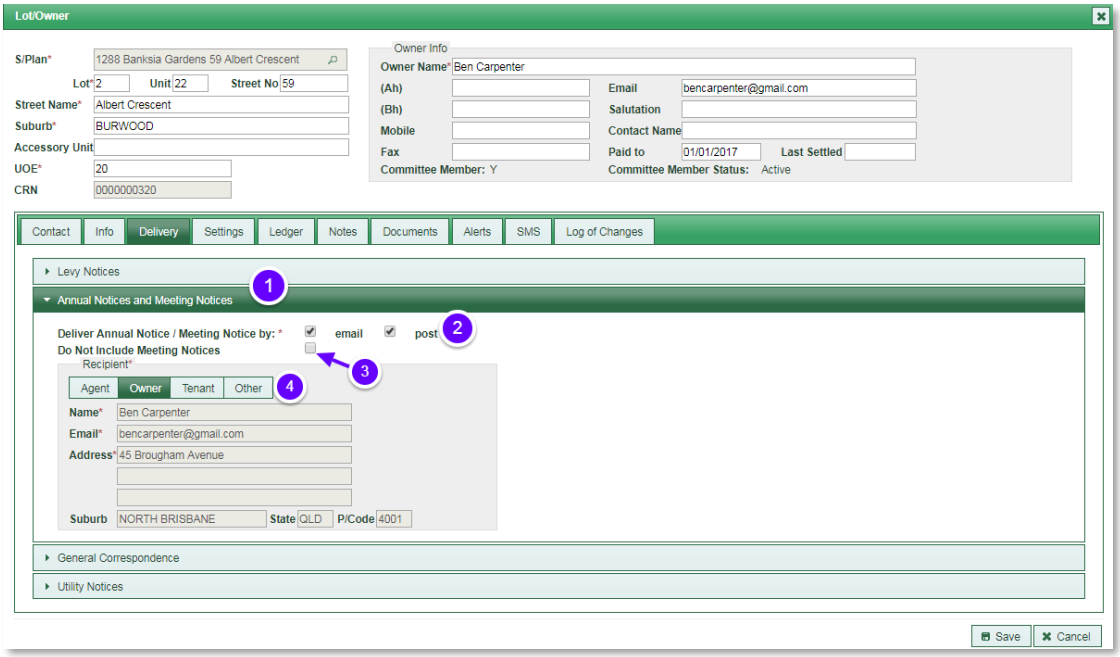
4. The details of the selected contact show here. They are greyed out and if you need edit the details, go to the Contact tab. (only the "Other" contact can be edited here)



Annual Notices and Meeting Notices Accordion

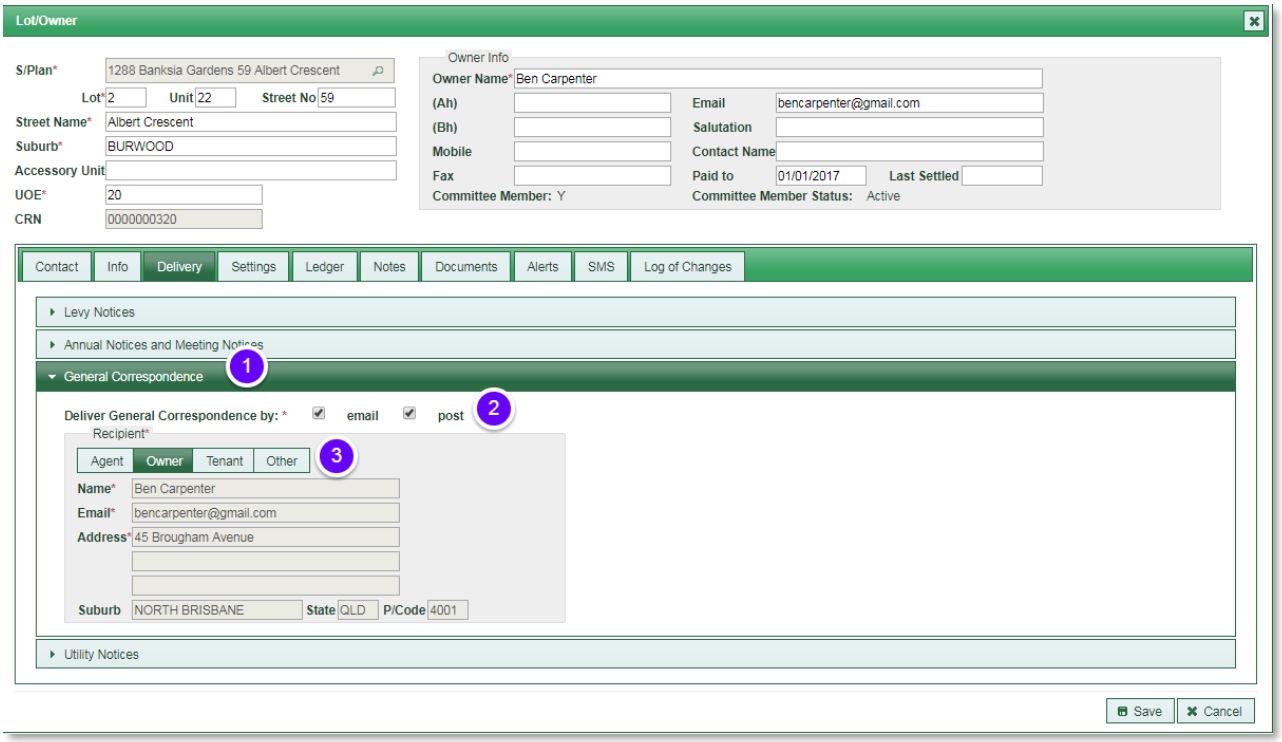
An owner may want these items to go to a different contact and by a different method to their levy notices. For example, the levy reminders might go to the property manager to pay but the owner wants to receive the annual notices and general correspondence themselves.

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



General Correspondence Accordion

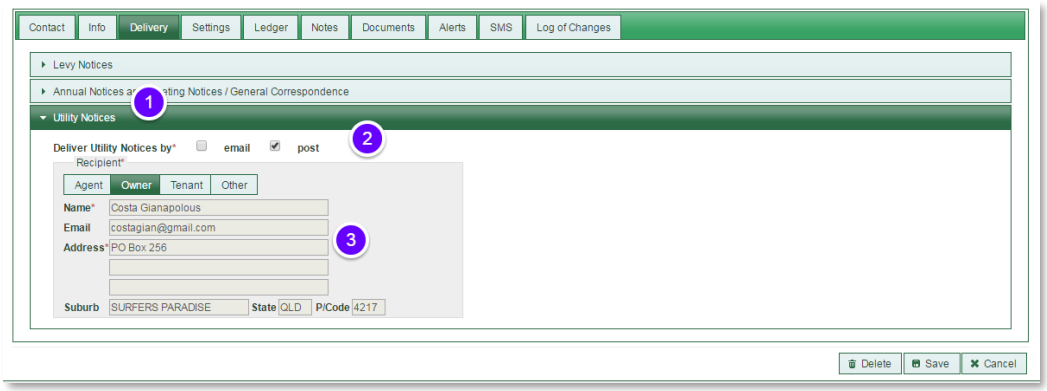
1. Click on the little white arrow next to the general correspondence accordion
2. Select the owner's preferred delivery method for general correspondence
3. The recipient will default to Owner but you can toggle between the tabs to alter



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.

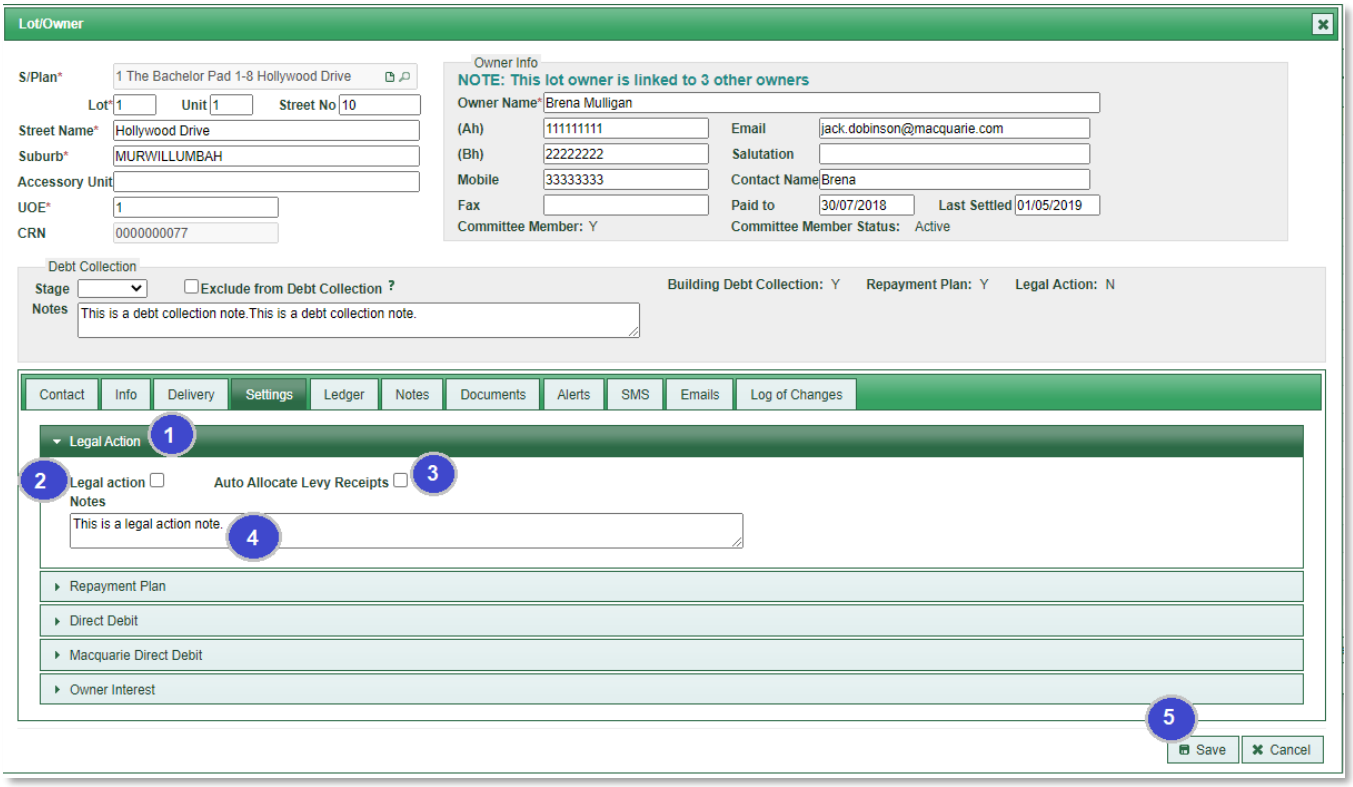


SETTINGS TAB

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

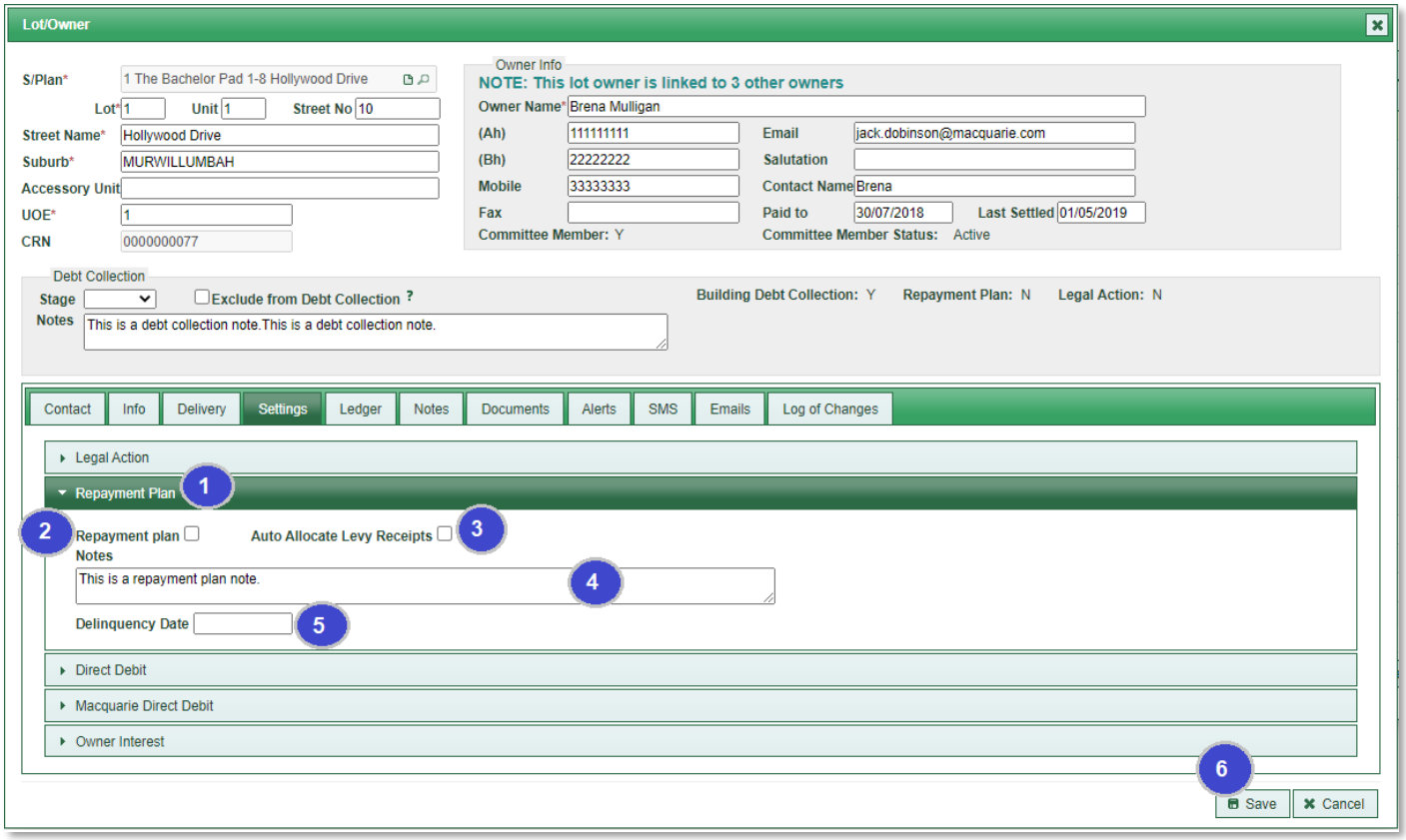
Legal Action Accordion

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.



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.



DIRECT DEBIT ACCORDION

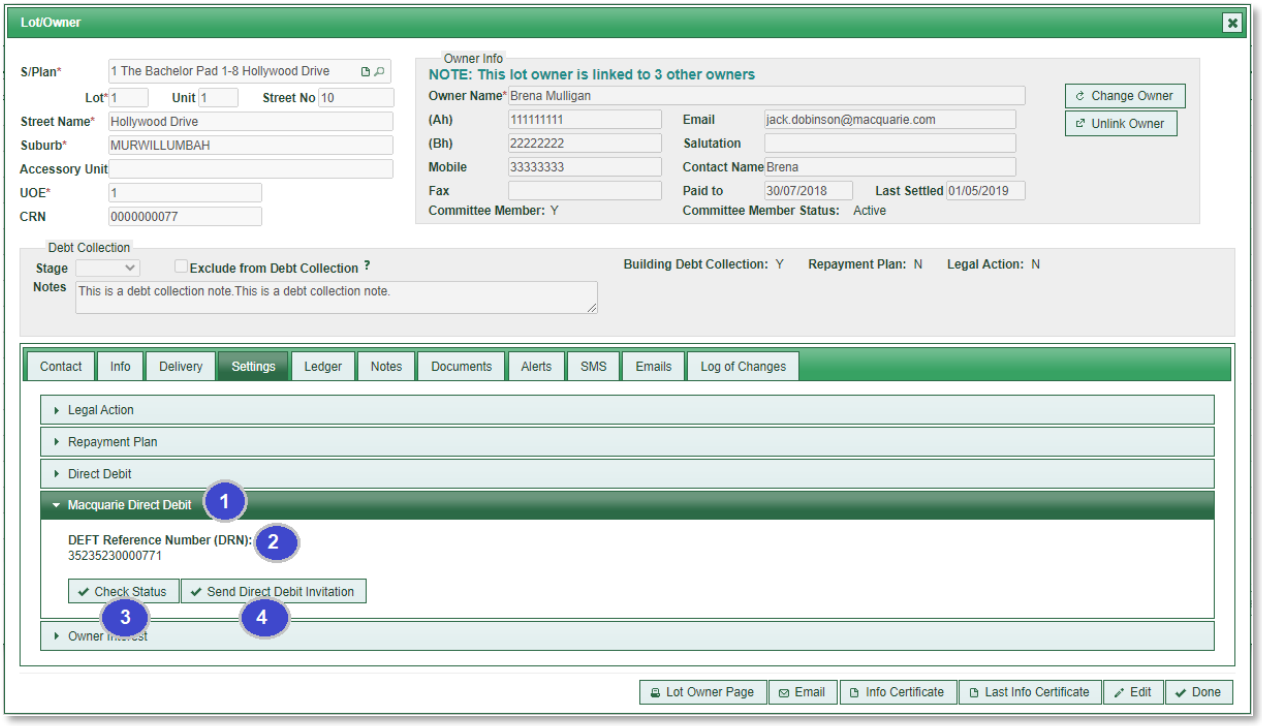
This feature is now redundant and has been replaced by the Macquarie Direct Debit functionality. See *Macquarie Direct Debit Accordion* below.

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 and ask for Macquarie Direct Debit to be enabled on your account. PropertyIQ Support will notify you once it's been enabled.

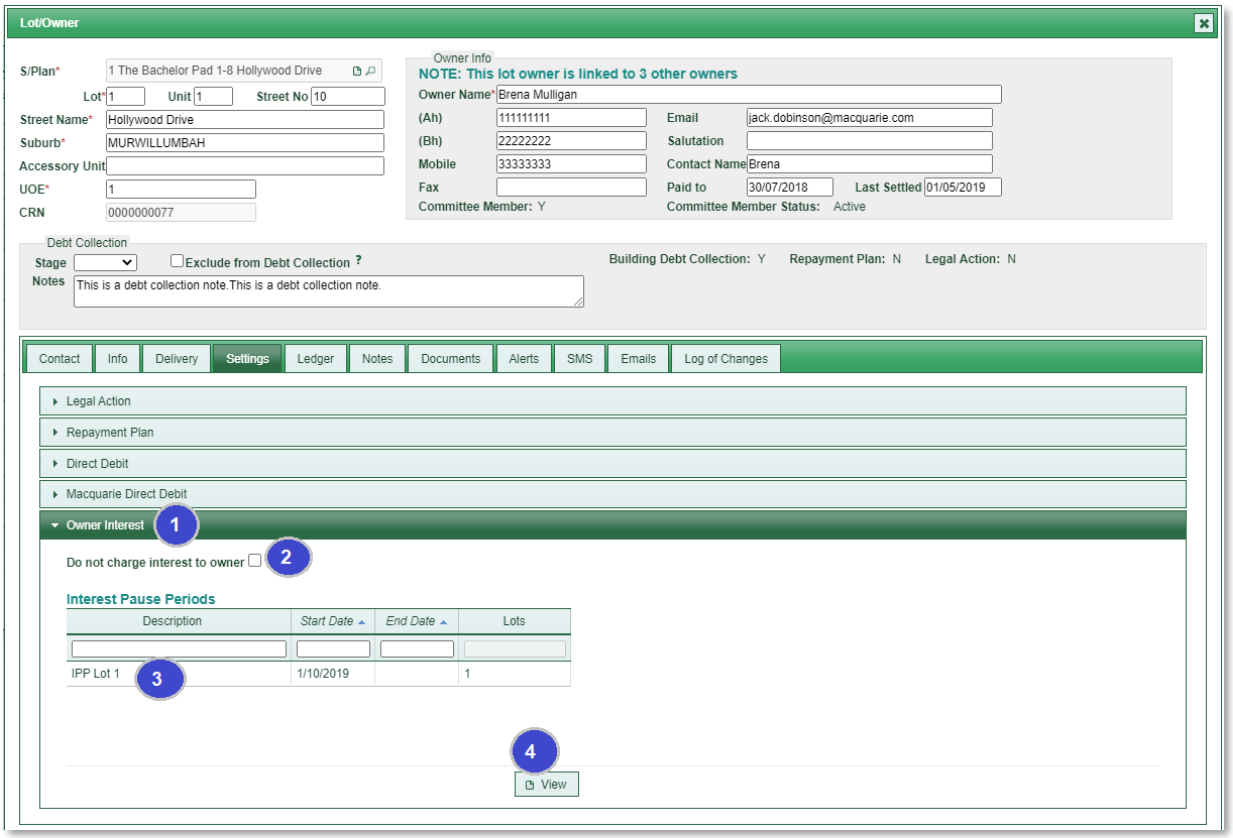
For detailed instructions on Macquarie Direct Debit, see the manual *'Macquarie Direct Debit (BIDD)'*.

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.



OWNER INTEREST ACCORDION

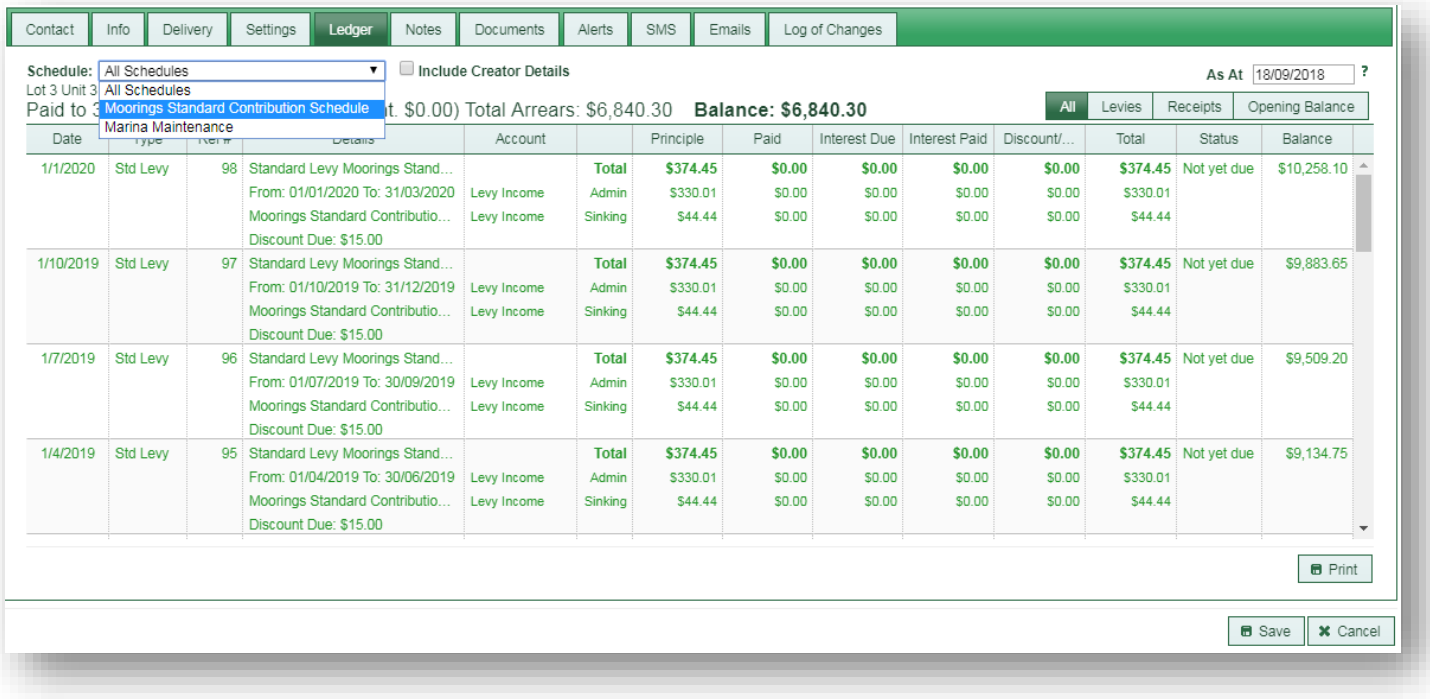
1. Click on the little white arrow next to the Owner Interest accordion.
2. If you have a rule to charge interest on overdue levies and you want to waive it, tick here. This will waive *all* interest charges for this owner while it stays ticked.
3. Any interest pause periods linked to the lot will appear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



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.



NOTE 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.

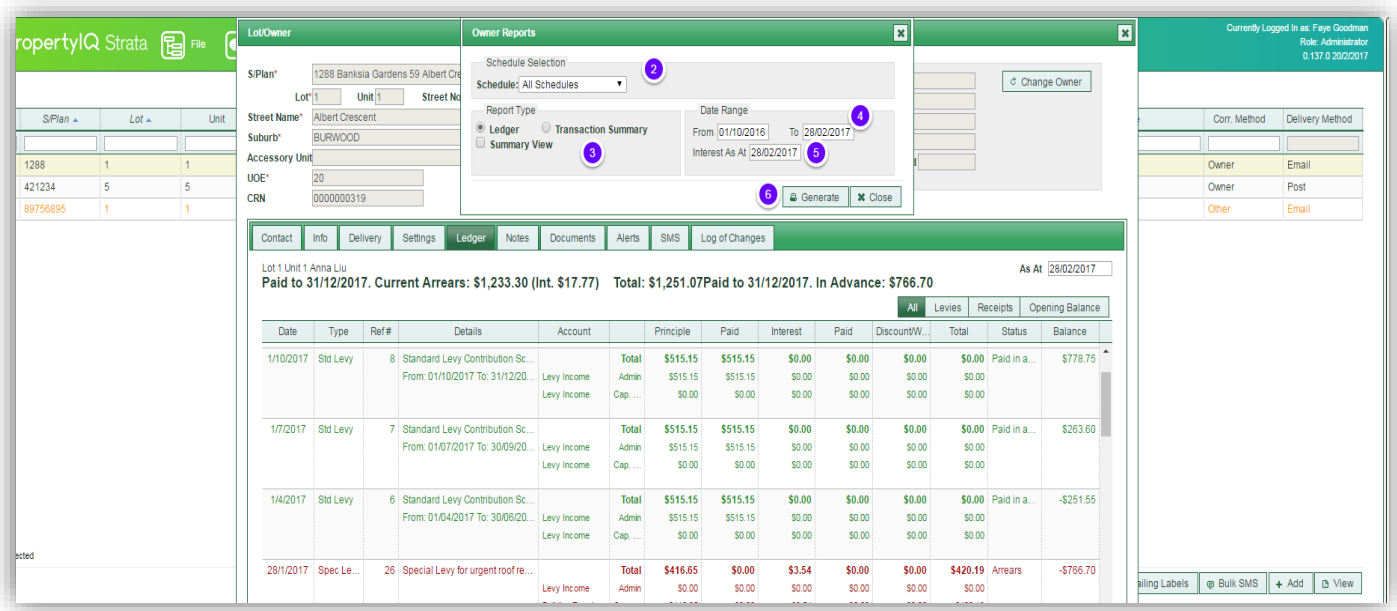
1. Click here to inclue creator details
2. By default, the ledger will show the status as at today's date but you can click here to open the calendar and change the date (this amount of interest will show as at the date you select)
3. By default you will see all transaction types but you can filter your 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 heree
17. The total – principal plus any interest due, less any discounts shows in this column

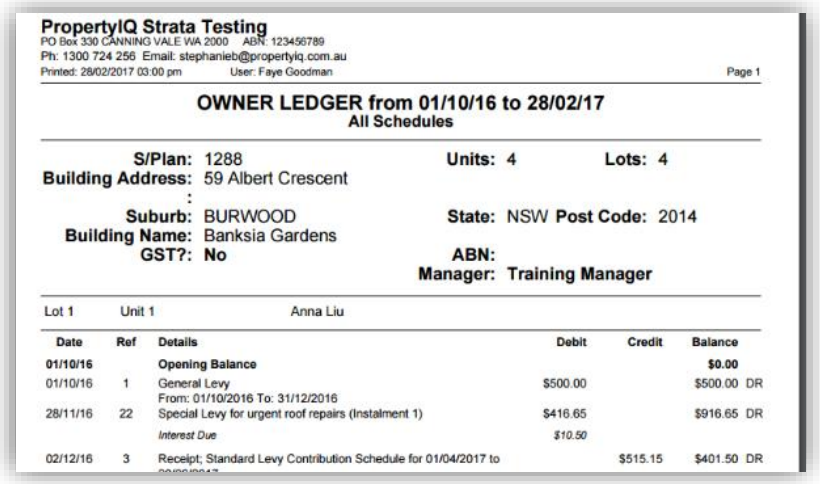
18. The status. i.e. paid, arrears, obal (opening balance) shows here
19. The balance shows here
20. Click *Print* to print a report of the owner's ledger. See below for instructions.

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 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

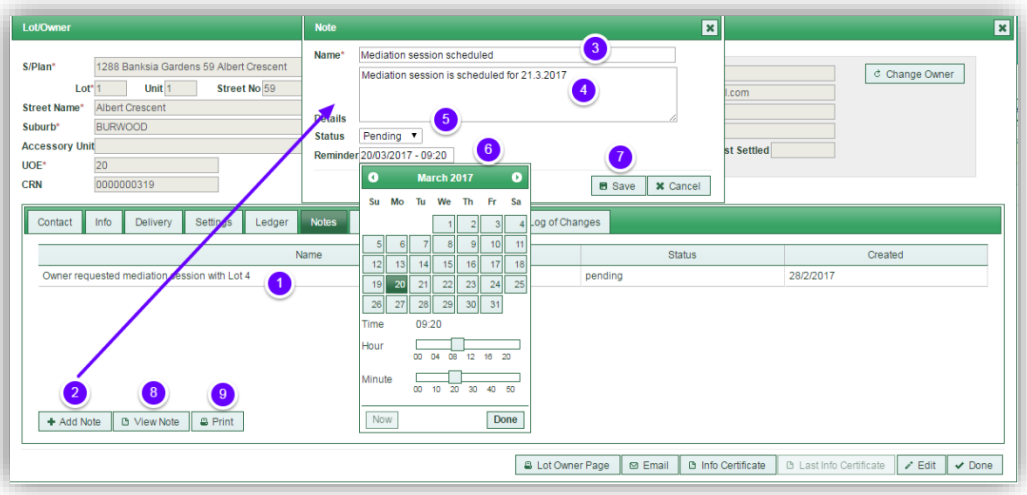
Lot 1 Unit 1 Anna Liu

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

NOTES TAB

You can record any notes about the owner here.

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



Printed Notes

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Notes Report

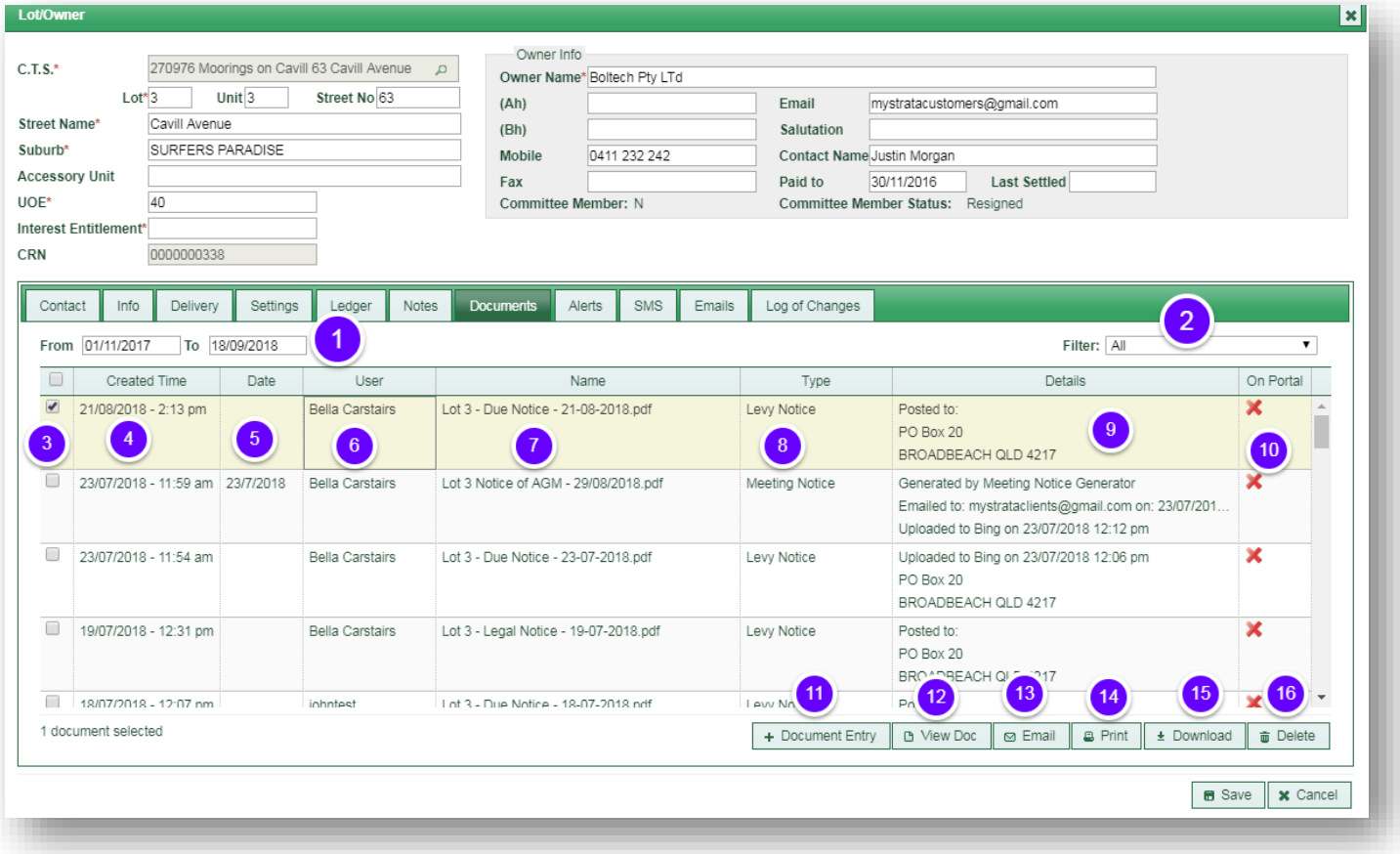
1288 1/1 Anna Liu

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



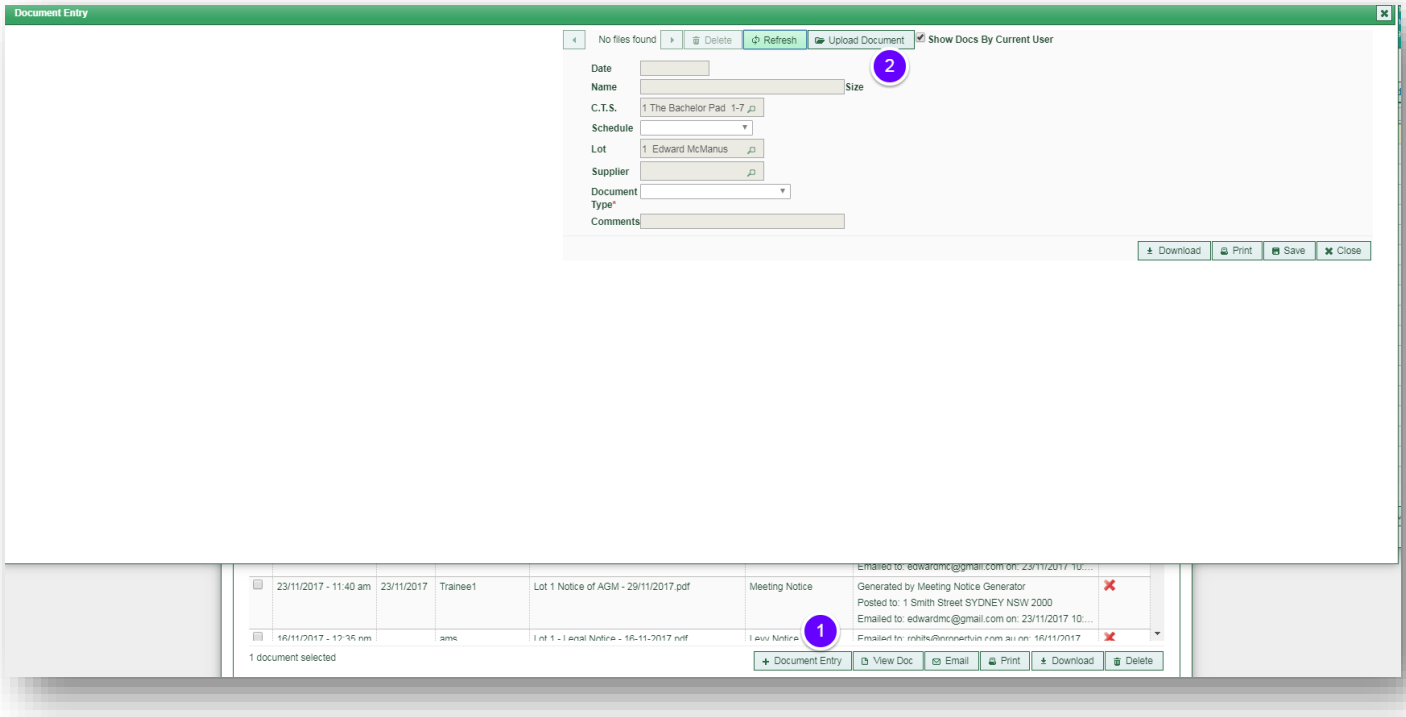
DOCUMENT ENTRY

You can upload documents in the following formats:

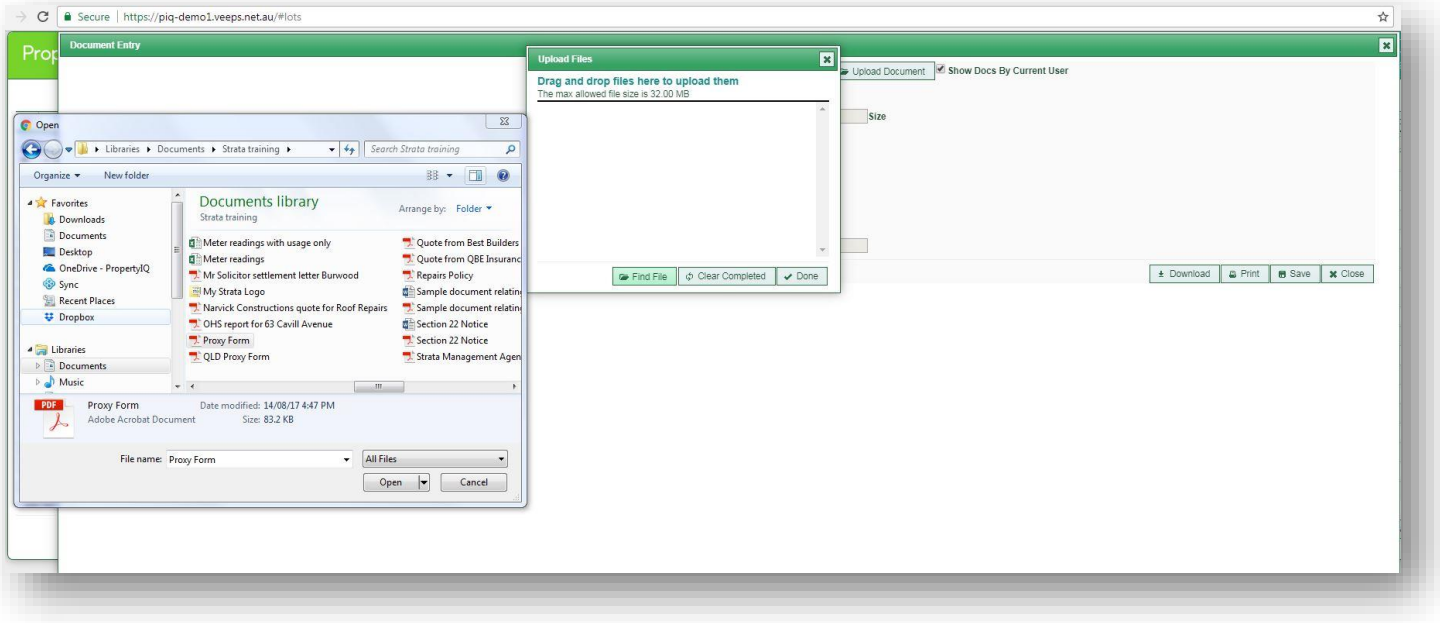
- PDF
- Images in .jpeg, .tiff and .bmp format
- Word
- Excel Spreadsheets
- Text File
- Email Files

Only PDF Documents will show as a preview.

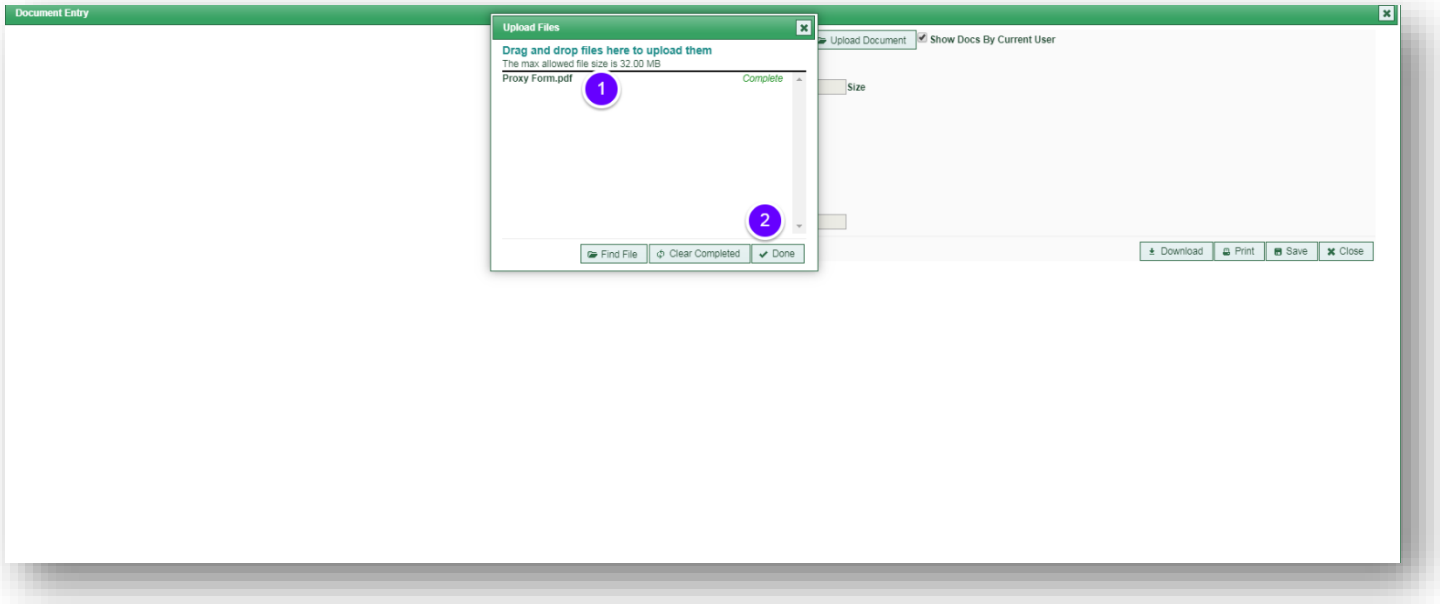
1. Click on *+Document Entry*. The document entry screen now pops up
2. Click on Upload Document



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

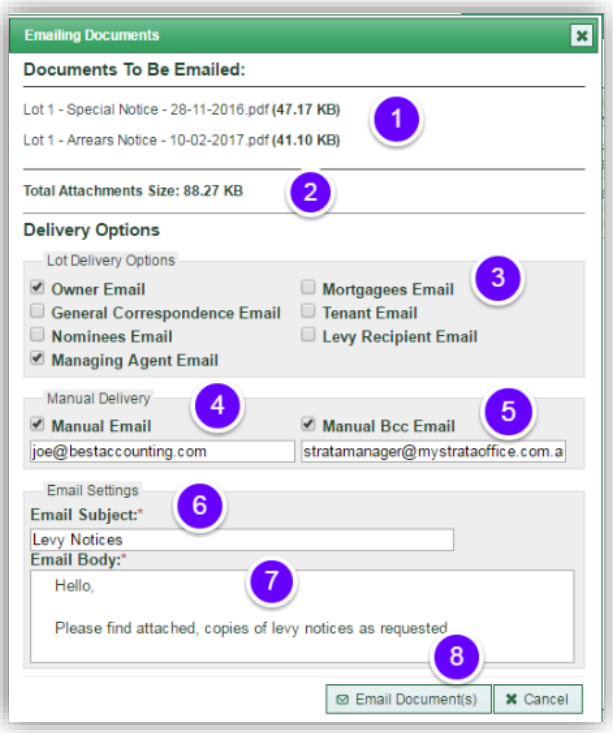


1. The document(s) you have selected will show here
2. Click *Done* when you have finished selecting documents



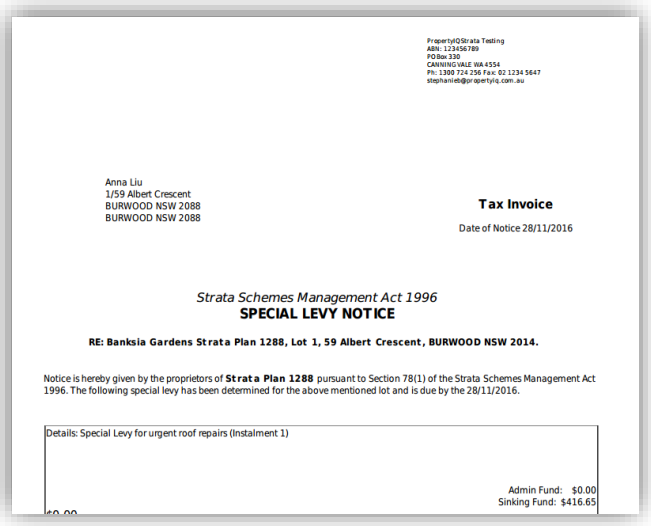
Emailing documents

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.



Print Documents

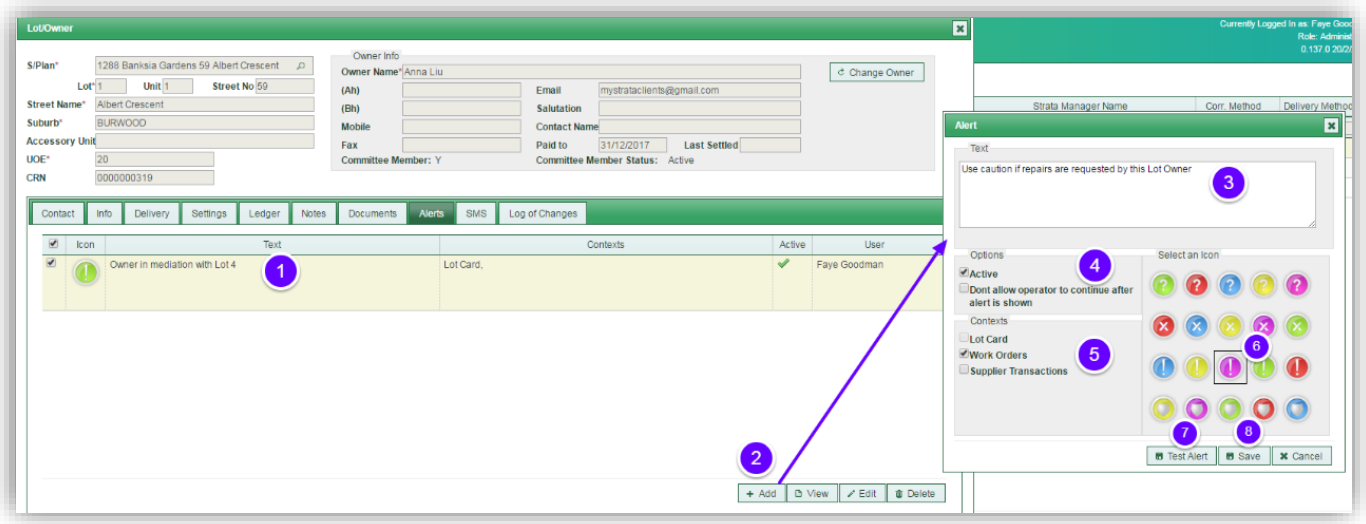
The print documents button creates a PDF that you can print



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



SMS TAB

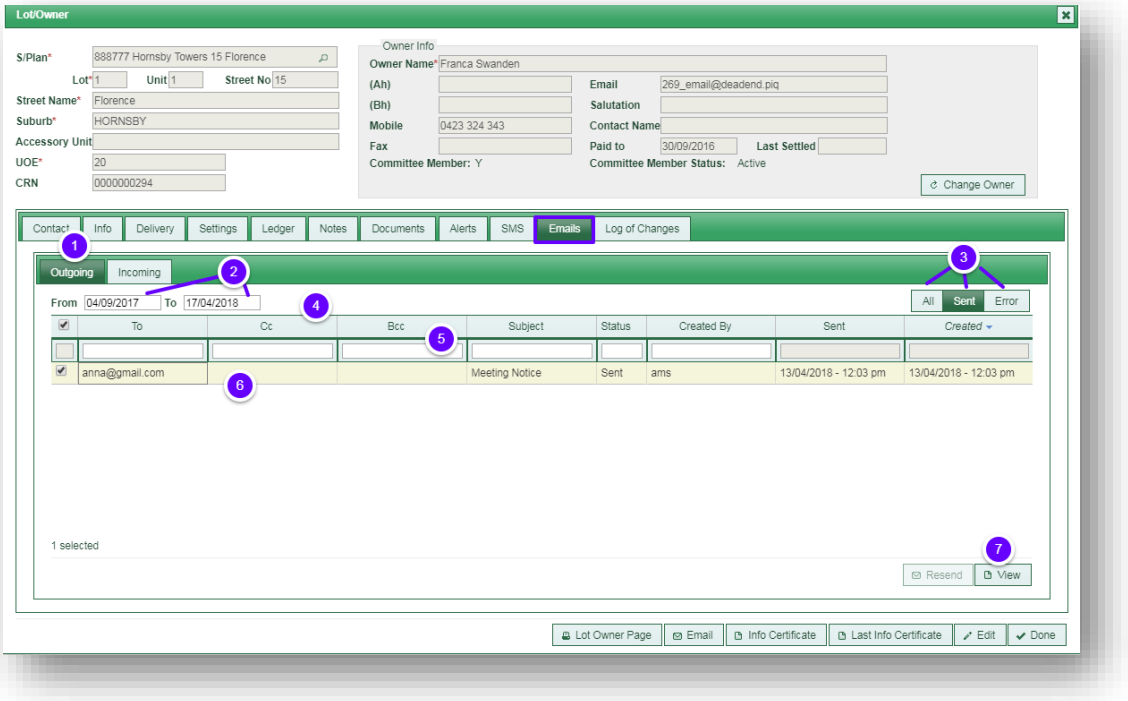
SMS is an additional service you can add to your subscription. For more information, see the manual "SMS"

EMAILS TAB

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

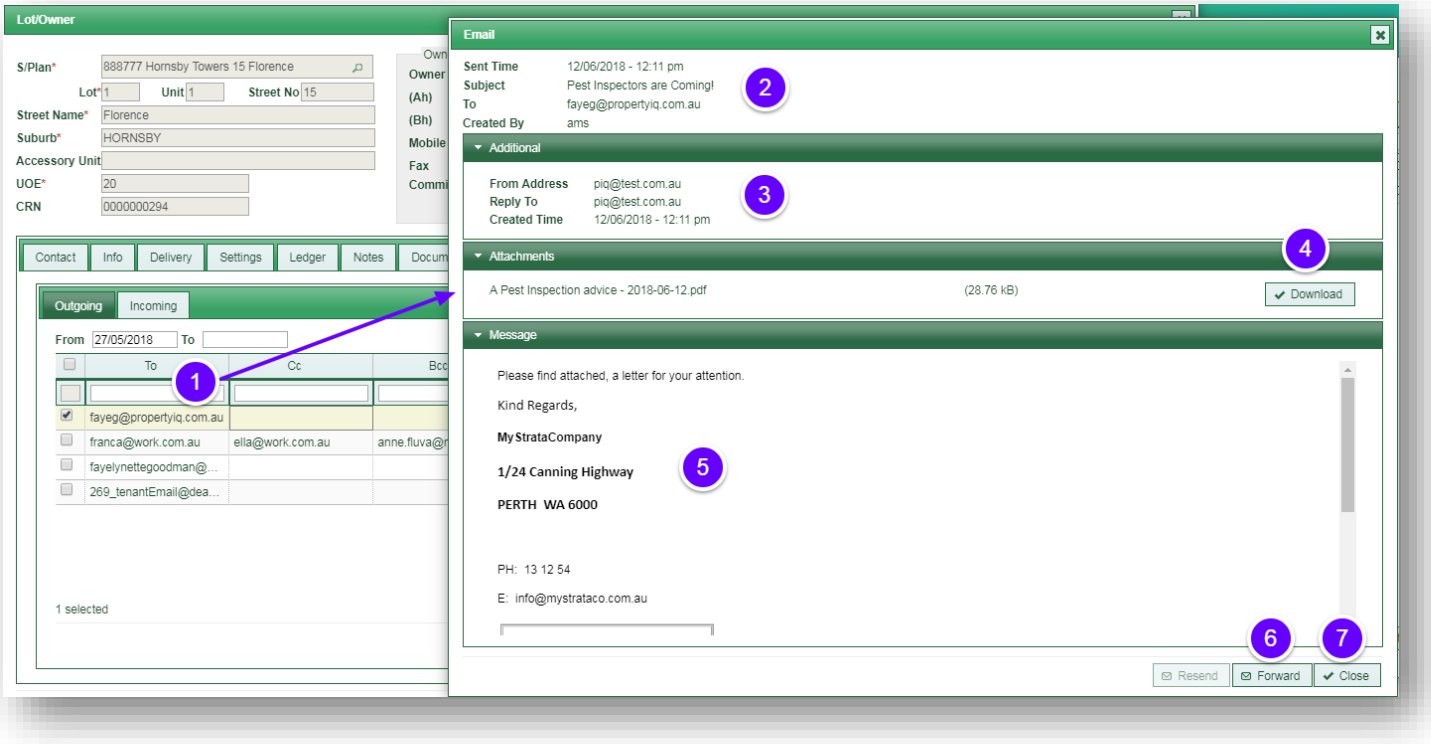
VIEWING OUTGOING EMAILS FOR A LOT OWNER FROM THE LOT OWNER CARD - EMAILS TAB

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



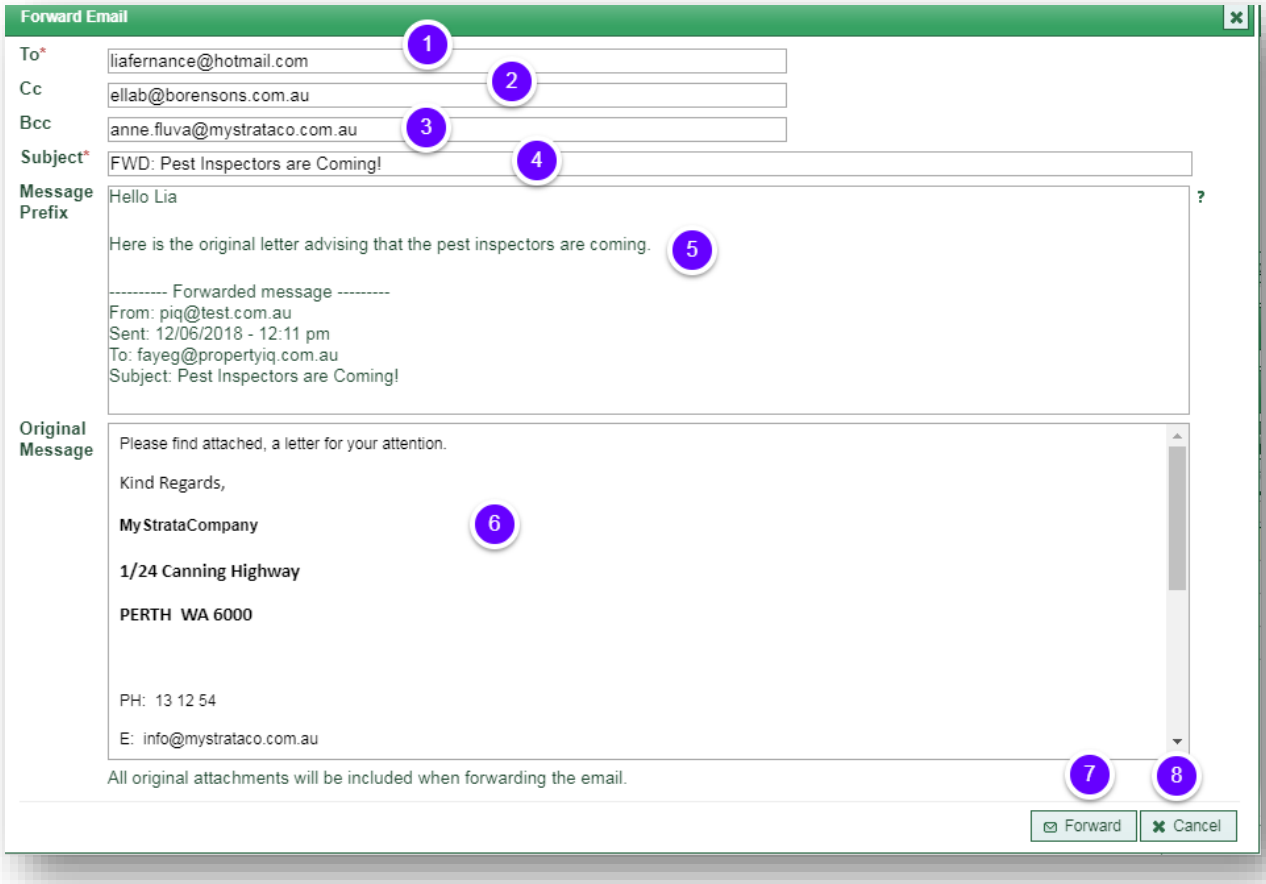
VIEWING AN INDIVIDUAL OUTGOING EMAIL FROM THE LOT OWNER CARD

1. Click on the email you want to view, to highlight it, and then double click to select it
2. The sent details show hers
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

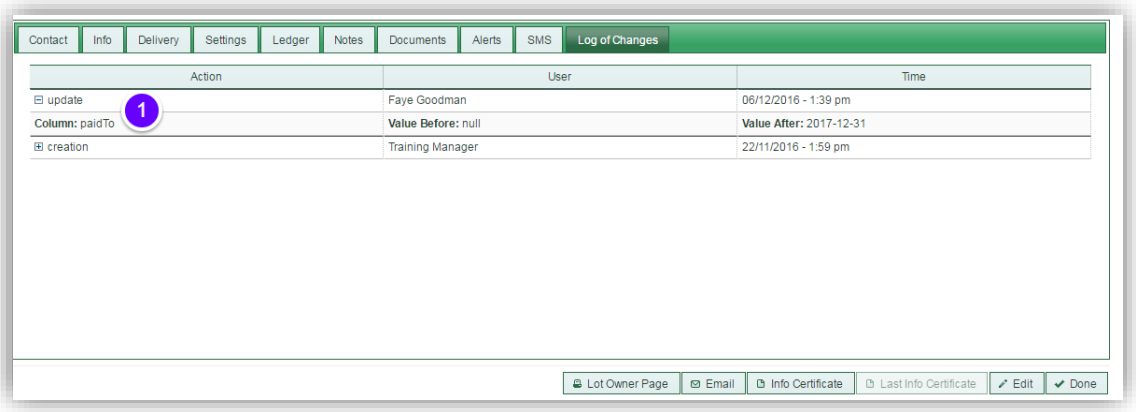
1. Type the email address you want to send the email to here (required)
2. Type an email address to cc to (optional)
3. Type an email address to bcc (optional)
4. The original subject line shows here but you can overtype with a new subject if you want to
5. Type the text you want to show in the forwarded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


Forward Email
To*
liafernance@hotmail.com
Cc
ellab@borensons.com.au
Bcc
anne.fluva@mystrataco.com.au
Subject*
FWD: Pest Inspectors are Coming!
Message Prefix
Hello Lia
Here is the original letter advising that the pest inspectors are coming.
---------- 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,
My StrataCompany
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.
Forward
Cancel
1
2
3
4
5
6
7
8

LOG OF CHANGES

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

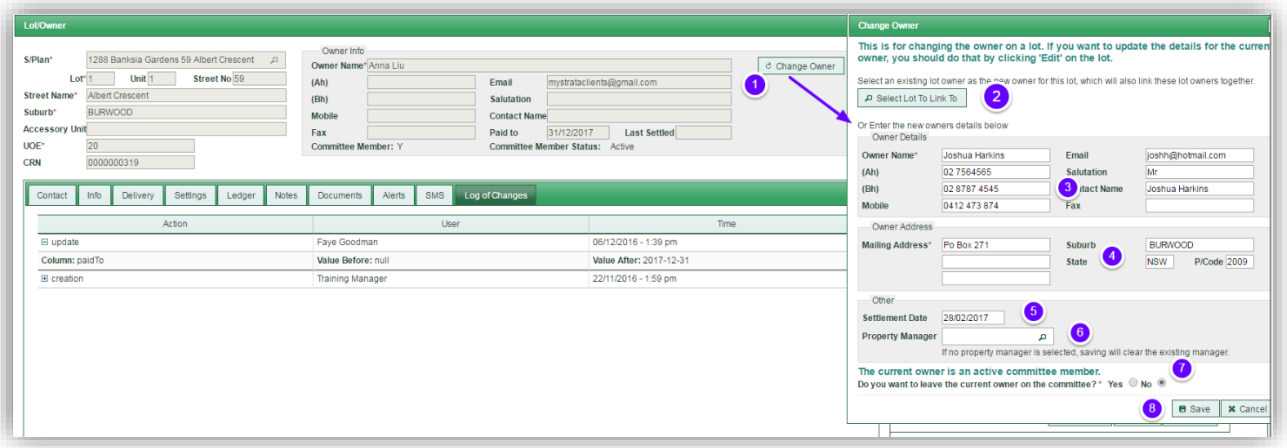
Click on the + sign to view full details



OTHER FUNCTIONS ON THE LOT OWNERS CARD

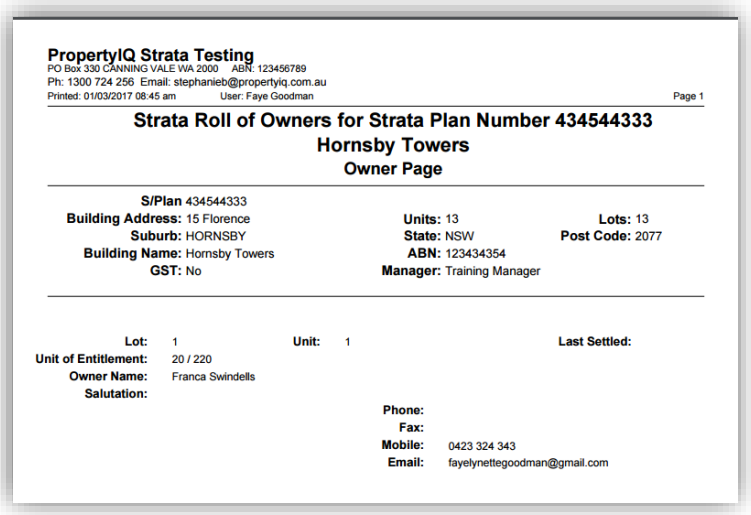
THE CHANGE OWNER BUTTON

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.



PRINT LOT OWNERS PAGE

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



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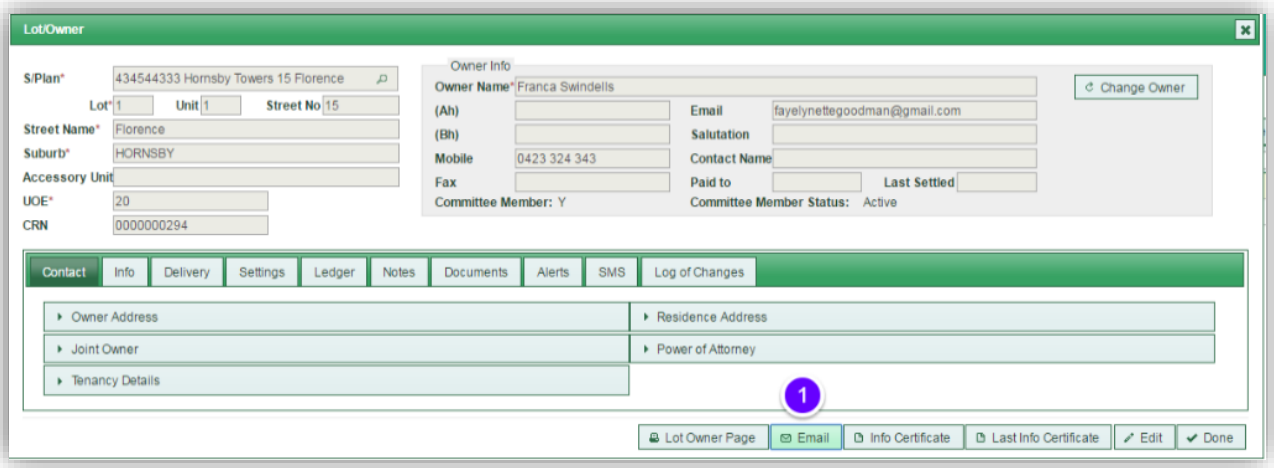
Strata Roll of Owners for Strata Plan Number 434544333
Hornsby Towers
Owner Page

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

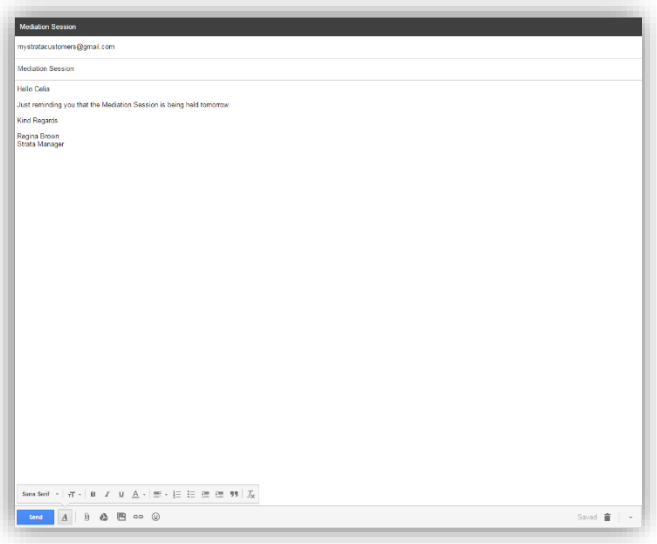
Lot: 1 **Unit:** 1 **Last Settled:**
Unit of Entitlement: 20 / 220
Owner Name: Franca Swindells
Salutation:
Phone:
Fax:
Mobile: 0423 324 343
Email: fayelynettegoodman@gmail.com

EMAIL BUTTON

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



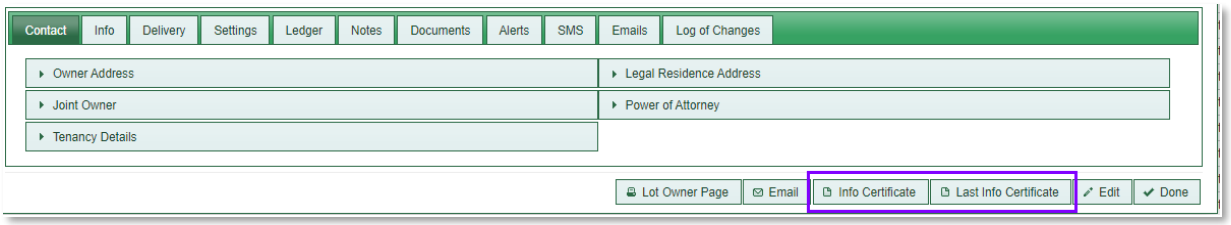
This will open your email acount. Type your message and click *Send* when done.

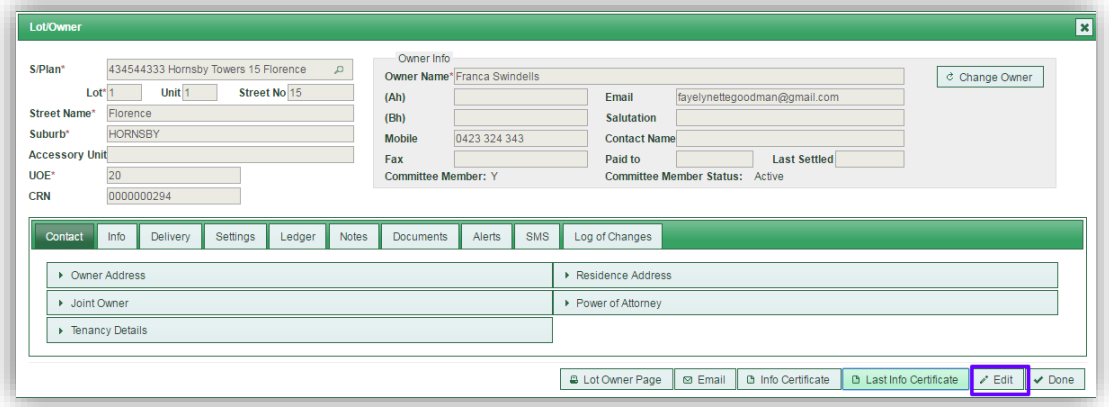


These emails are sent from your local email account (e.g. Outlook on your computer) and will show in the sent items of your email account. You can move them into PropertyIQ Strata using the incoming emails function. For details, see the manual "Incoming and Outgoing Emails"

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.



EDIT BUTTON

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