Lot owners screen

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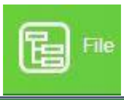
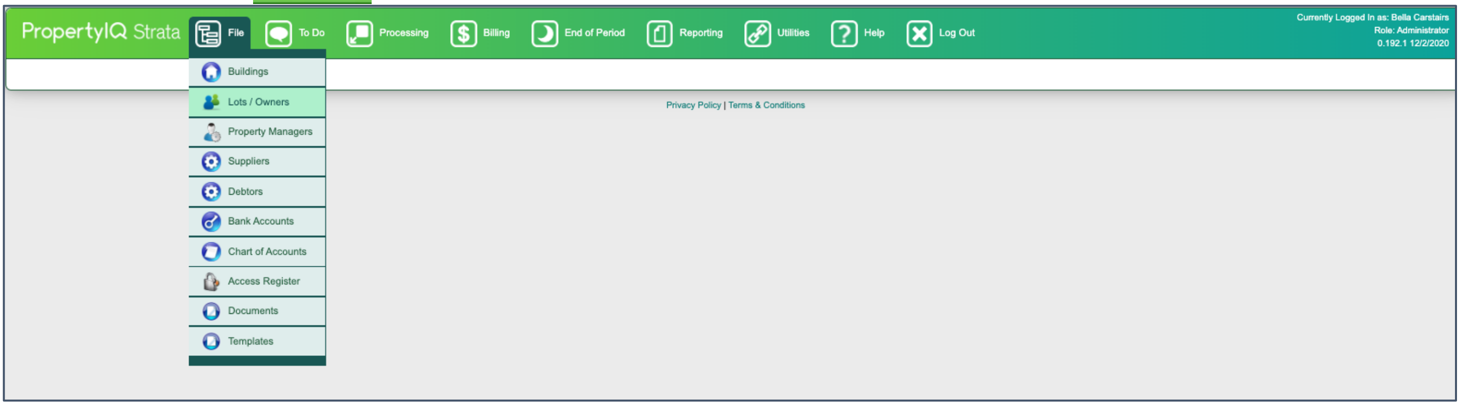
INTRODUCTION

From the Lots/Owners screen you can:

- Search and filter lots on the screen
- View relevant information for all lot owners
- Perform bulk actions such as:
    - Emailing all lots
    - SMS all lots
    - Exporting all lot data
    - Creating mailing labels; and
    - Send a mail merge letter to all lots

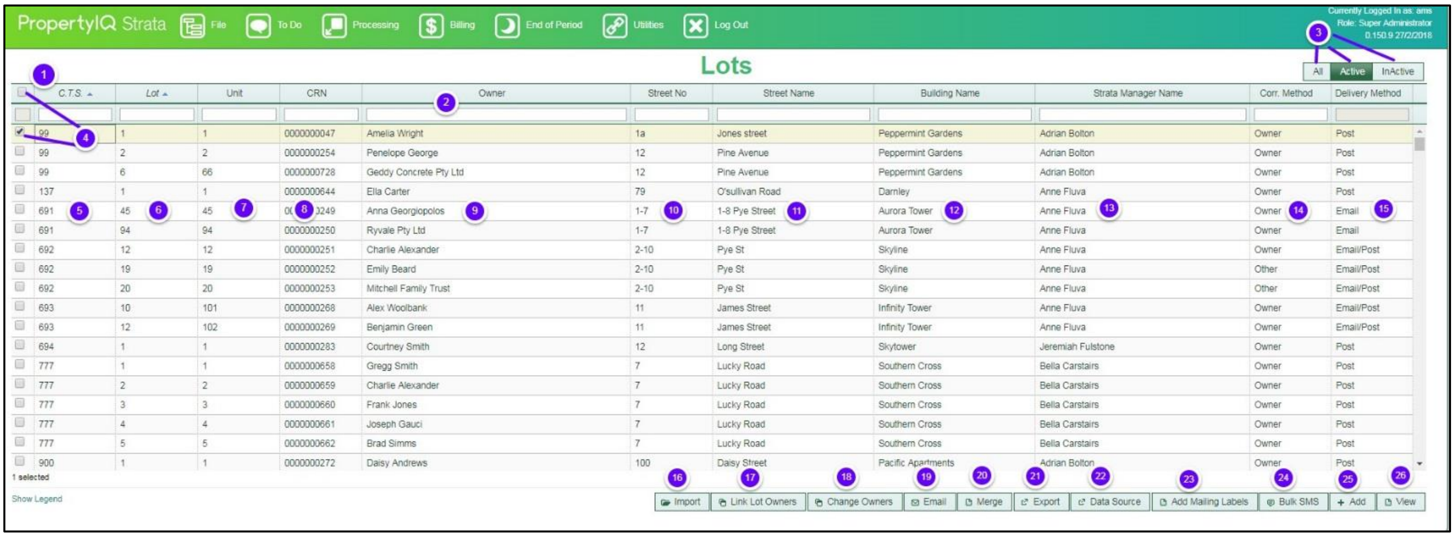
GETTING STARTED

To get started, go to  and select Lots/Owners



VIEWING LOTS/OWNERS SCREEN

1. Lots/Owners show on the screen in strata plan order by default, but you can click on any column heading to change the order
2. Type some key letters in any of the empty boxes on the second line to refine your view
3. Lots that are attached to an active building show on the screen by default but you can click on the tabs to change your view to lots belonging to inactive buildings or to view Al
4. Click on the boxes on the left side of the screen to highlight a single lot owner or click on the box in the top left of the screen to highlight all the lot owners showing on the screen.
5. The strata plan or OC number of the Lot owner's building shows in this column.
6. The Lot number of the lot shows in this column.
7. The unit number of the lot shows in this column
8. The Custmer Reference Number (CRN) or DEFT reference of the lot shows in this column. This is the lot owner's unique identifier and is automatically created when the lot is created
9. The owner's name shows in this column.
10. The street number of the lot shows in this column.
11. The street name for the lot shows in this column.
12. The name of the building the lot is situated in shows in this column
13. The name of the strata manager for that building show in this column
14. The correspondence method for this lot shows in this column. This is the entity that is ticked to receive notices for that lot. This could be be owner, agent, tenant or other.
15. The delivery method for notices for this lot shows in this column. This could be email or post
16. Use this button to Import lot details– See instructions below
17. Use this button to link two or more owners together. See instructions below.
18. Use this button to change owner(s) if a lot is sold. See instructions below.
19. Use this button to email lot owner(s) See instructions below.
20. Use this button to merge owner details into a mail merge template on the program. See instructions below
21. Use this button to export lot owner details. See instructions below
22. Use this button to export lot owner details as a data source for mail merge documents external to the program.
23. Use this button to create mailing labels for selected owners on the screen.
24. Use this button to bulk SMS owners. See the manual "SMS" for detailed information.
25. Click here to start adding a new lot owner.
26. Click here to view the lot owner card for a lot that is selected on the screen



PropertyIQ Strata | File | To Do | Processing | Billing | End of Period | Utilities | Log Out

Currently Logged In as: ams
Role: Super Administrator
0.150.9 27/2/2018

Lots

All | Active | InActive

C.T.S.	Lot	Unit	CRN	Owner	Street No	Street Name	Building Name	Strata Manager Name	Corr. Method	Delivery Method
99	1	1	0000000047	Amelia Wright	1a	Jones street	Peppermint Gardens	Adrian Bolton	Owner	Post
99	2	2	0000000254	Penelope George	12	Pine Avenue	Peppermint Gardens	Adrian Bolton	Owner	Post
99	6	66	0000000728	Geddy Concrete Pty Ltd	12	Pine Avenue	Peppermint Gardens	Adrian Bolton	Owner	Post
137	1	1	0000000644	Ella Carter	79	O'sullivan Road	Darnley	Anne Fluva	Owner	Post
691	45	45	[illegible]	Anna Georgiopolos	1-7	1-8 Pye Street	Aurora Tower	Anne Fluva	Owner	Email
691	94	94	0000000250	Ryvale Pty Ltd	1-7	1-8 Pye Street	Aurora Tower	Anne Fluva	Owner	Email
692	12	12	0000000251	Charlie Alexander	2-10	Pye St	Skyline	Anne Fluva	Owner	Email/Post
692	19	19	0000000252	Emily Beard	2-10	Pye St	Skyline	Anne Fluva	Other	Email/Post
692	20	20	0000000253	Mitchell Family Trust	2-10	Pye St	Skyline	Anne Fluva	Other	Email/Post
693	10	101	0000000268	Alex Woolbank	11	James Street	Infinity Tower	Anne Fluva	Owner	Email/Post
693	12	102	0000000269	Benjamin Green	11	James Street	Infinity Tower	Anne Fluva	Owner	Email/Post
694	1	1	0000000283	Courtney Smith	12	Long Street	Skytower	Jeremiah Fulstone	Owner	Post
777	1	1	0000000658	Gregg Smith	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
777	2	2	0000000659	Charlie Alexander	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
777	3	3	0000000660	Frank Jones	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
777	4	4	0000000661	Joseph Gauci	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
777	5	5	0000000662	Brad Simms	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
900	1	1	0000000272	Daisy Andrews	100	Daisy Street	Pacific Apartments	Adrian Bolton	Owner	Post

1 selected

Show Legend

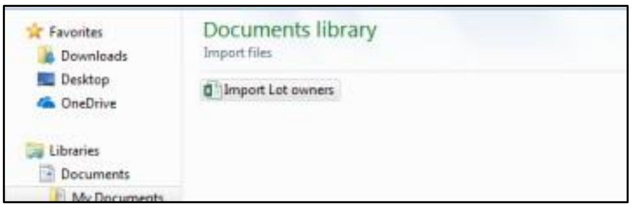
Import | Link Lot Owners | Change Owners | Email | Merge | Export | Data Source | Add Mailing Labels | Bulk SMS | + Add | View

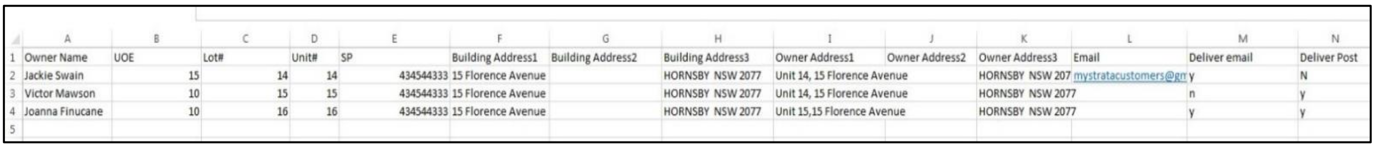
IMPORT LOT OWNERS

If you have a large number of lot/s owners to enter, you can choose the Import function to save time.

First you will need to have the lot/owner data in an excel spreadsheet. Save this on your computer in a place you will remember. Don't worry if the field names are different to those on PropertyIQ

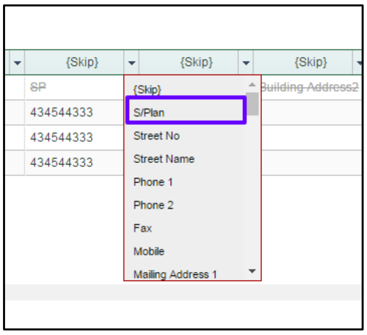
1. Click on the Import button
2. Click on the Find File Icon to search for the file



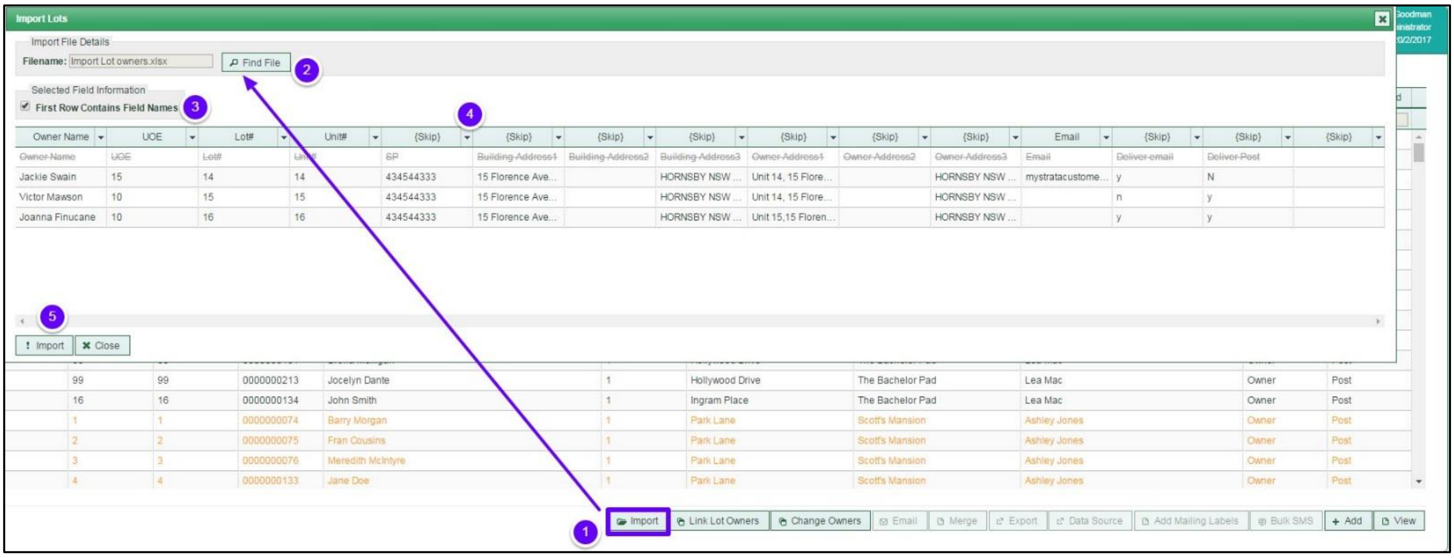


	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Owner Name	UOE	Lot#	Unit#	SP	Building Address1	Building Address2	Building Address3	Owner Address1	Owner Address2	Owner Address3	Email	Deliver email	Deliver Post
2	Jackie Swain	15	14	14	434544333	15 Florence Avenue		HORNSBY NSW 2077	Unit 14, 15 Florence Avenue		HORNSBY NSW 207	mystratacustomers@gn	y	N
3	Victor Mawson	10	15	15	434544333	15 Florence Avenue		HORNSBY NSW 2077	Unit 14, 15 Florence Avenue		HORNSBY NSW 2077		n	y
4	Joanna Finucane	10	16	16	434544333	15 Florence Avenue		HORNSBY NSW 2077	Unit 15,15 Florence Avenue		HORNSBY NSW 2077		y	y
5														

3. If the first row of your spreadsheet contains the Field names, (as in the example above) tick this box so that PropertyIQ will ignore the first line in the import process.
4. If your field names do not match those used on PropertyIQ, click on the dropdown to choose the field that corresponds to your spreadsheet. For example, here the field name "SP" is not used in PropertyIQ so you would use the dropdown to select the field S/Plan



5. When all details are complete, click *Import* to complete the import.



IMPORTANT NOTES FOR IMPORTING LOT OWNERS

Date formats and lease/tenancy dates:

- When importing all dates *except* the lease start and expiry dates, you should use the format dd/mm/yy.
- When importing lease start and expiry dates you need to use the date format yyyy-mm-dd (or you could add these dates manually later)

Agent/Property manager:

- Agent details are created on import and are automatically linked to other imported lots if the details match.

Lot CRN (DEFT reference number):

- ***To retain an existing DEFT reference number*** from your previous software, you must use the Import Lots function
- If you add lot owners manually using the +Add function from the lot owners screen, PropertyIQ will automatically create a new CRN (DEFT reference number) for each lot.
    - NOTE: This action cannot be reverted and the reference number for a lot cannot be changed once created.

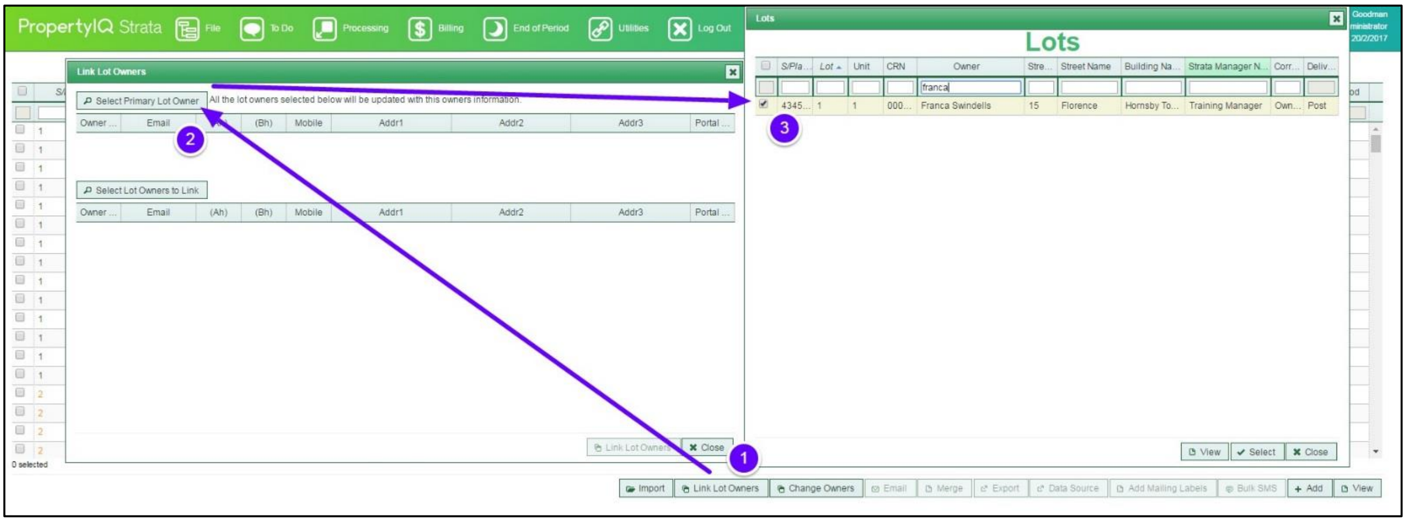
LINKING LOT OWNERS

If the same individual or company owns more than one Lot (even if the lots are in different buildings), you can link them. Linking lot owners means that you will only have to update any changes to the lot owner's details once.

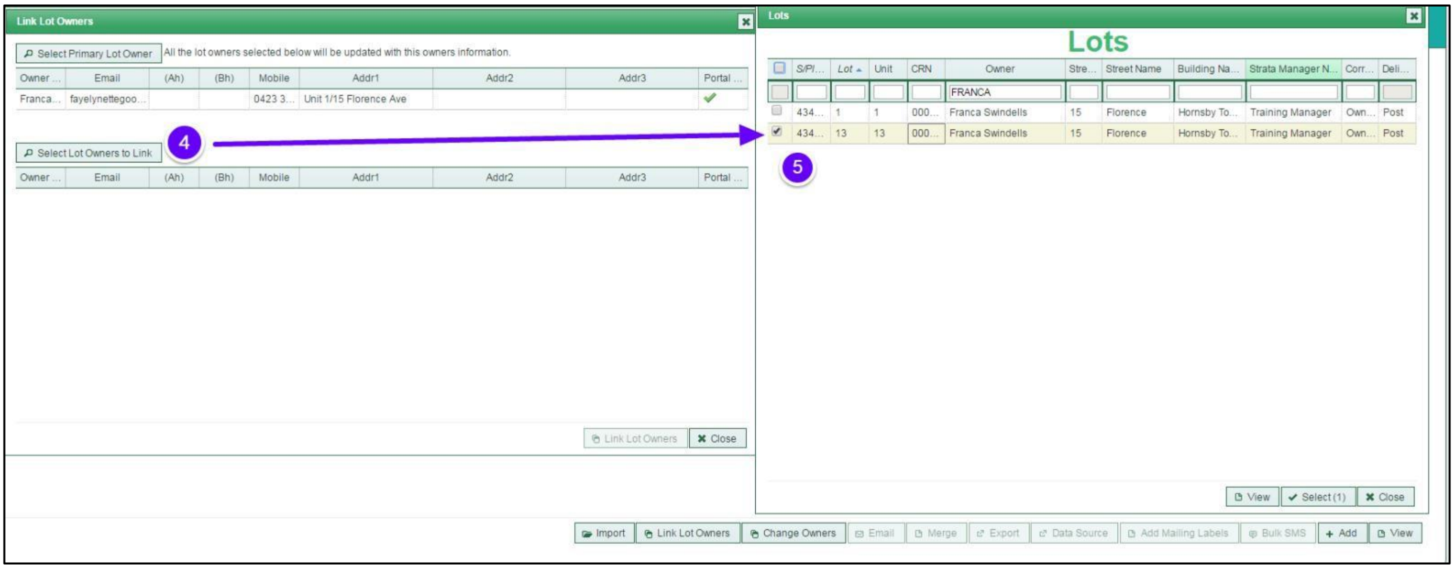
Selecting the Primary Owner – the primary owner is the main owner, choose the one that has the correct data in their lot owner card.

When you link lot owners, the information on the Primary Owner's card will overwrite the information on all the other lot owner cards you link them to. Once lot owners are linked you can update any of the linked owner cards and all linked owner details will be updated in one step.

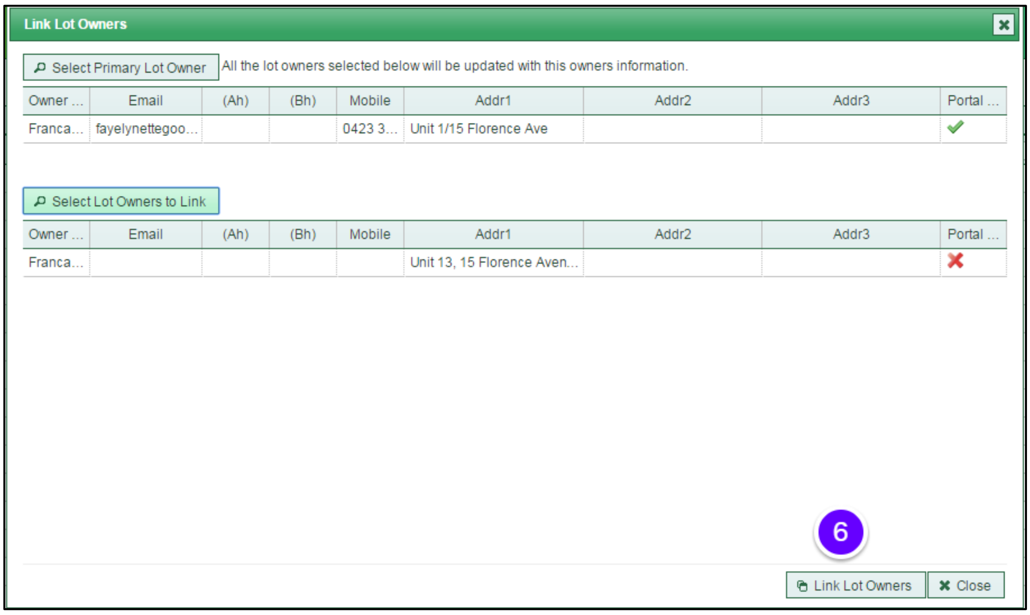
1. Click on the Link Lot Owners Button to open the Link Lot Owners screen
2. Click on the Select Primary User button to open the Lots search screen.
3. Type some key letters to find the owner you are looking for then click to highlight and double click on that owner to select



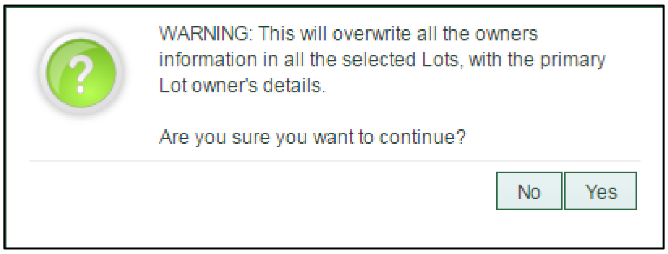
4. Click on the Select Lot Owners to Link button to search for other owners you want to link to the primary owner
5. Type some key letters and then highlight the owner you want by clicking on their name. Then double click to select them. You can select as many as you want.



6. Once there is at least one lot owner in the lower area, the Link Lot Owners button will no longer be greyed out. Click to complete the process.



You will receive a prompt to confirm that you want to proceed.

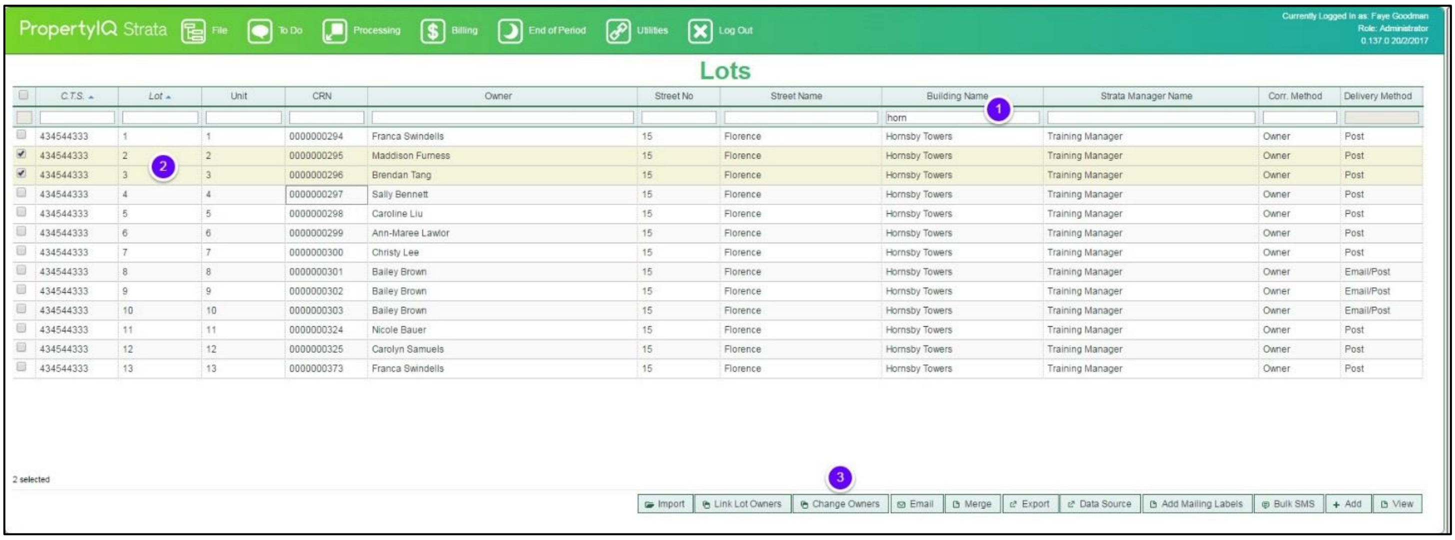


Click *Yes* to confirm

CHANGE OF OWNERS

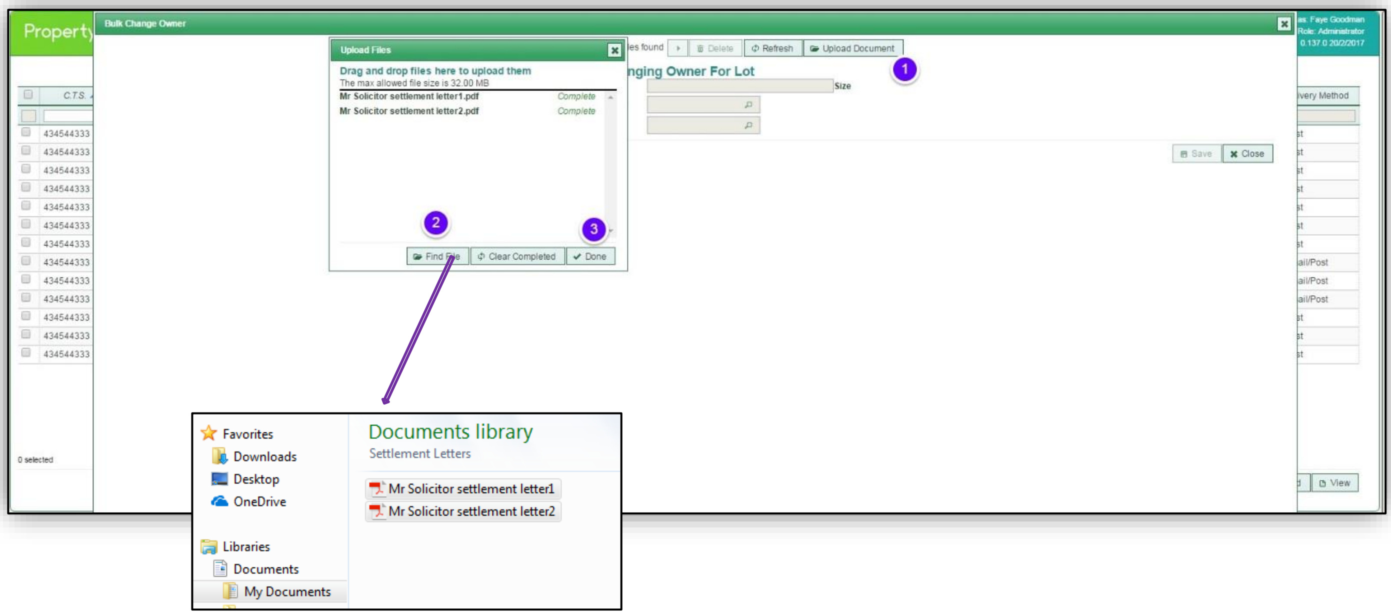
Recording a change of owner from the lot owners screen allows you to easily upload the change of ownership documents.

1. On the lots owners screen, type in some key letters to search for the lot ownership you need to change
2. Tick in the box on the left side of your screen to select them
3. Select *Change Owners*

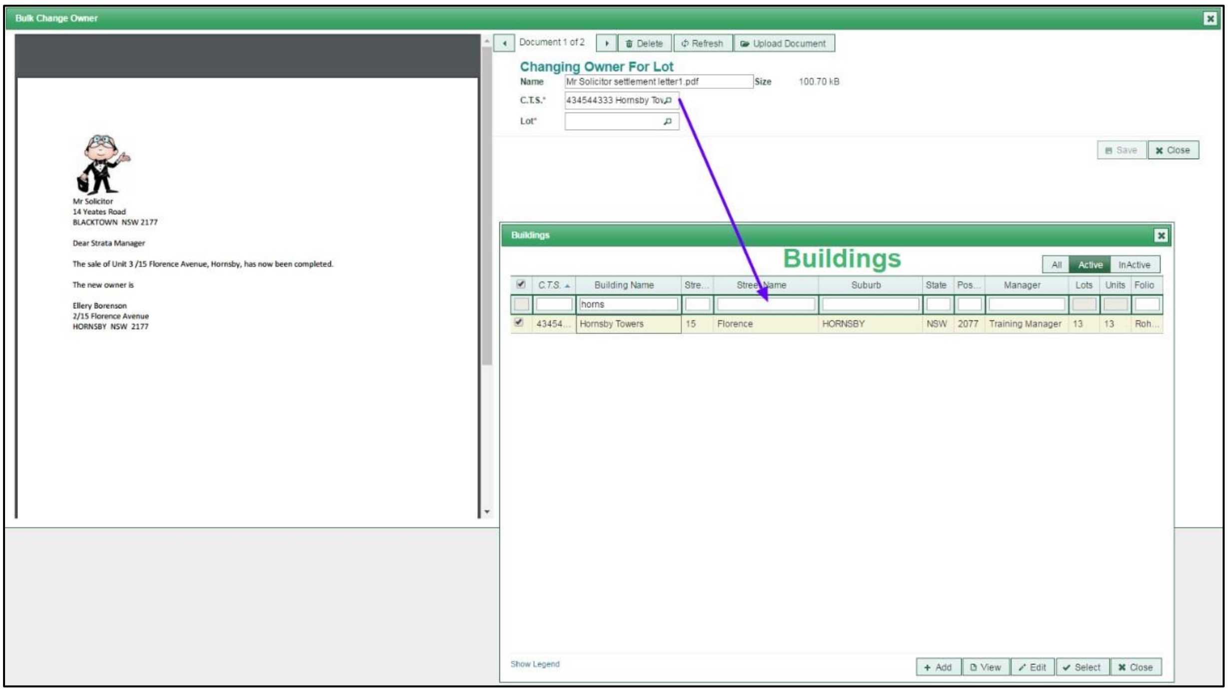


You can then upload the change of ownership documents in bulk. First save any change of ownership documents onto your computer in a place you will remember.

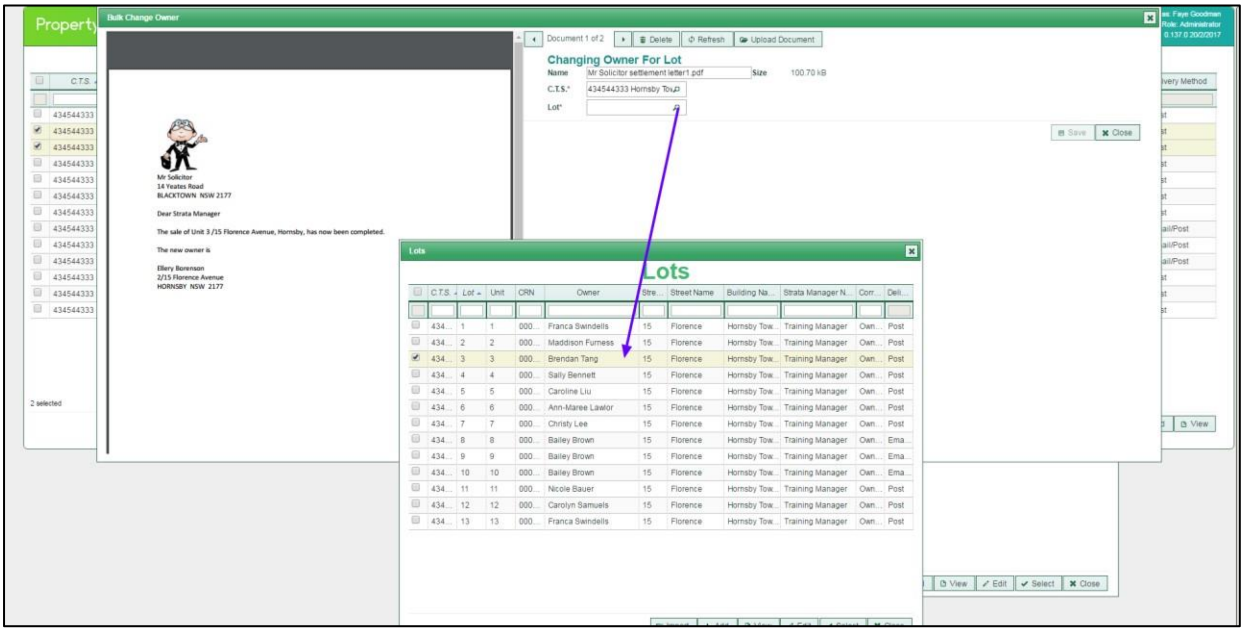
1. Click on *Upload Document*
2. Click on *Find File* to search for the files. You can select your files in bulk by clicking on the first file you want, holding the control key and then clicking on the last file you want
3. Click *Done* when you are finished uploading files



Use the search icon to find the building the lots you want to change are a part of Type some key letters to refine the search and find the building you want Highlight the building you want and then double click to select

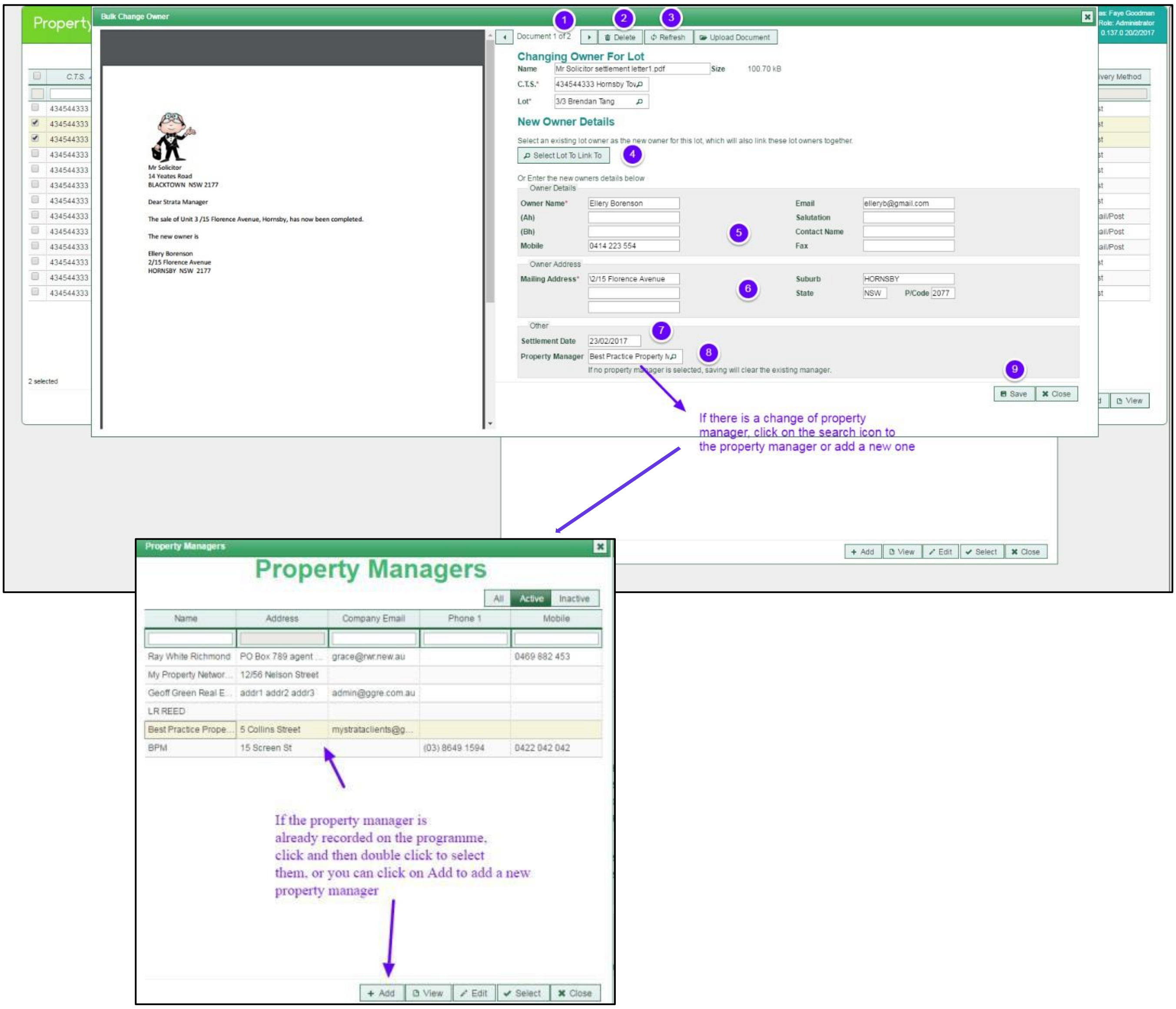


Use the search icon to search for the Lot you want to change
Type some key letters to refine the search and find the lot you want.
Click to highlight that lot and then double click to select



1. The first document you loaded will preview on the left, use the arrows to move between documents
2. Click the Delete button if you need to delete a document
3. Click the Refresh button if you want to refresh the screen
4. If the new owner of this lot already owns another lot in the building and you want to link them, clink on Select Lot Owner to Link to and search for the Lot owner you want to link to.
5. Complete the new owner details here
6. Complete the owner address details here
7. Type the date the sale settled here
8. If there is a new Property Manager for this lot , use the search icon to find the new property manager if they are already recorded on PropertyIQ or add a new one
9. Click *Save*

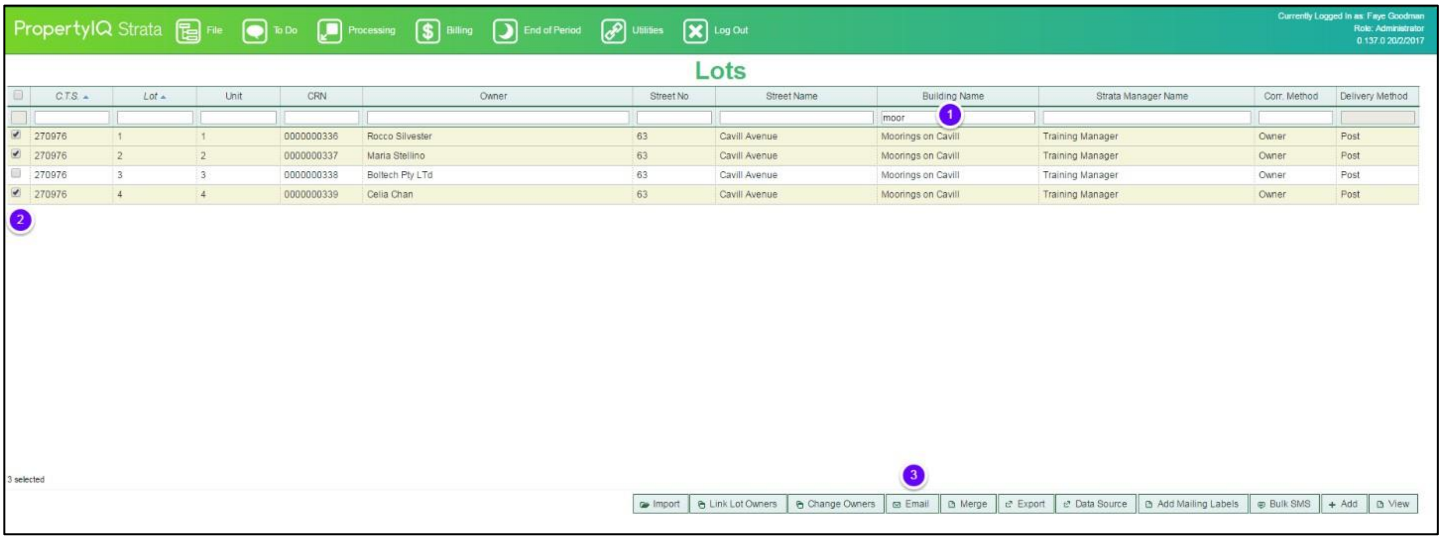
If you have uploaded multiple documents, the preview screen will now show the next document and you can complete the change details for the next lot. Click on the *Close* button on the bottom right when you've completed adding lots.



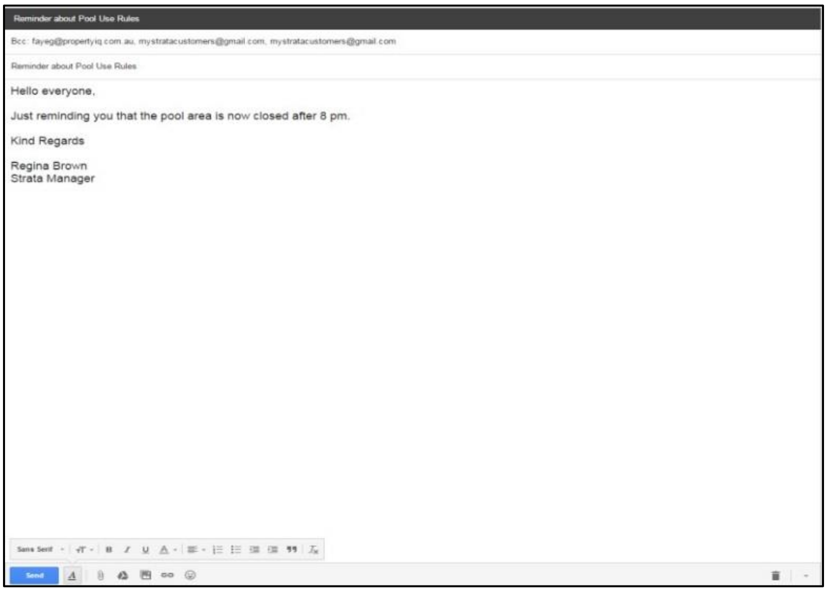
BULK EMAILING LOT OWNERS

You can bulk email by selecting multiple owners from the Lot owners screen.

1. Type some key letters to find the lot owners you are looking for. (They don't have to be from the same building)
2. Tick the boxes on the left to select the owners you want to email, or click in the top row to select all owners on the screen
3. Click *Email*



This will open your email account. Type your message and click *Send* when you're ready.



NOTE *Recipients will automatically be Bcc'ed so they can't see one another's email address. Emails sent by this method are not recorded on PropertyIQ.*

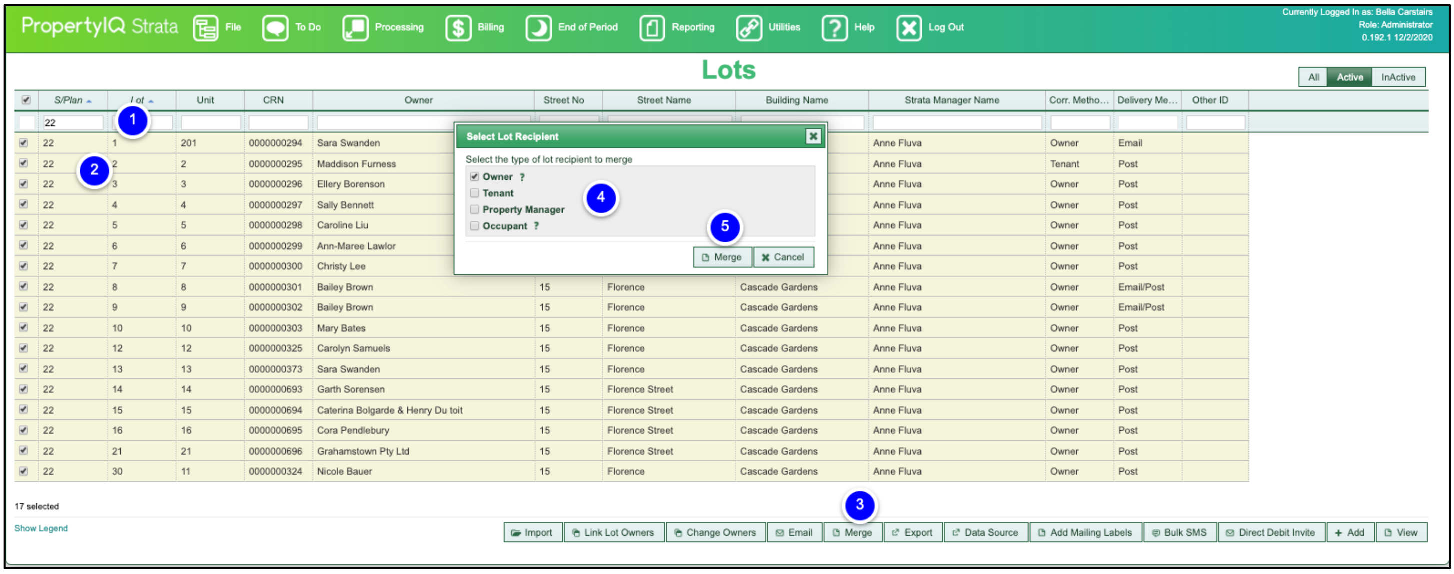
LOT OWNER MAIL MERGE

You can bulk generate and send a mail merge letter (including attachments) to a single or multiple recipients using a new or existing mail merge template in PropertyIQ.

You can issue a mail merge letter to one or more of the following types of recipients:

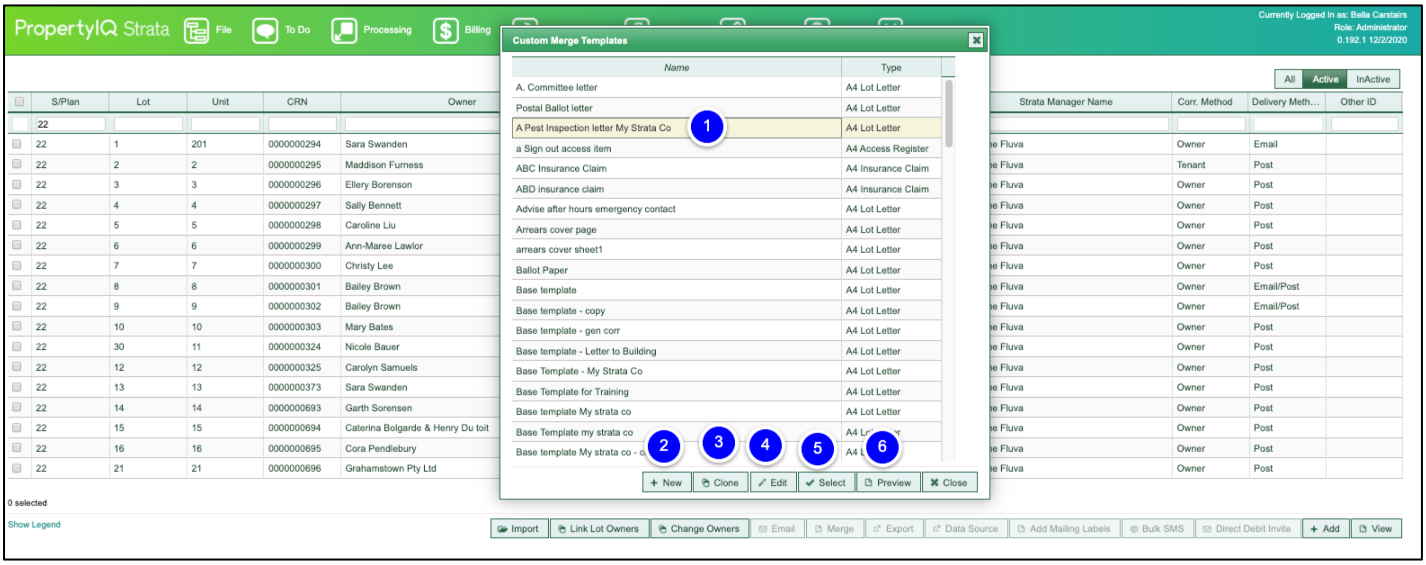
- **Owner** – uses the owner name and the correspondence address of the Lot
  - *NOTE*: This is nominated on Lot card > Delivery tab > General Correspondence delivery setting
- **Tenant** – any lot that has a tenant attached
- **Property manager** – any lot that is attached to a property manager
- **Occupant** – this option uses the lot address and inserts the words "The resident" at the beginning of the address details. This option is good for sending notifications that only apply to residents.

1. Type some key letters to refine your search and find the lot owner(s)you are looking for
2. Tick the boxes on the left side of the screen to select the lot owner(s) you want to merge to or tick the box at the top to Select *All*
3. Click on the *Merge* button on the bottom of the screen
4. Click to select the recipient type(s) – you can select single or multiple types
5. Click *Merge*

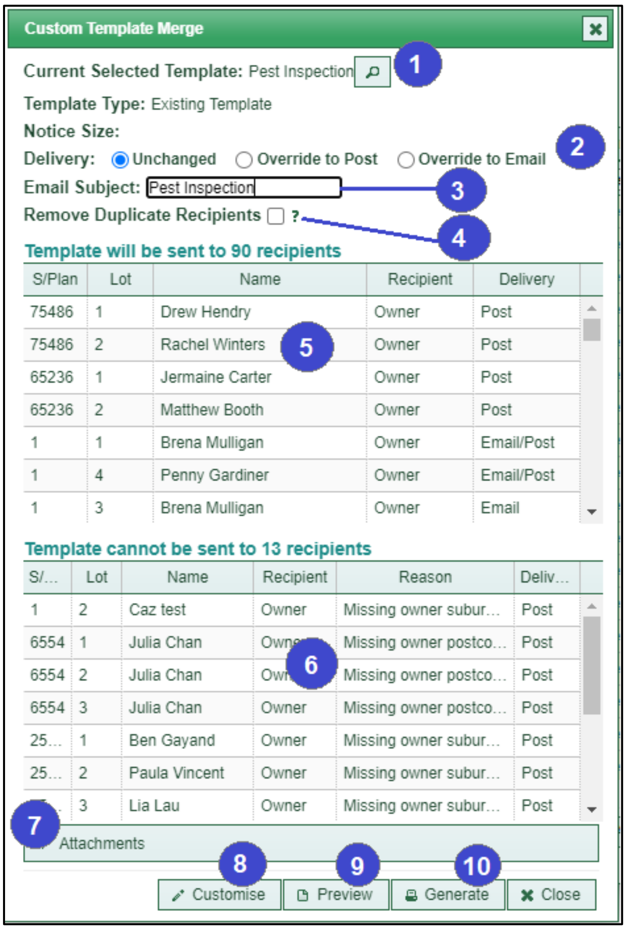


You'll see a list of all your custom merge templates.

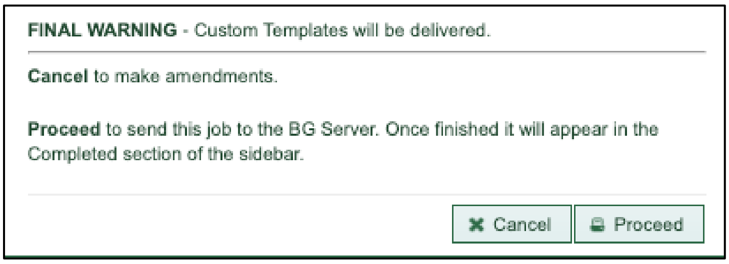
1. Click and then double click to select a template
2. Use the *New* option to create a new template
3. Use the *Clone* option to clone an existing template
4. Use the *Edit* option to make a permanent change to the selected template
5. To select a template, you can either click to highlight and then click *Select* (or click to highlight and double click to select)
6. Preview to see how the merged document will look



1. The selected template shows here – you can use the search icon to select another template
2. Select the delivery method here – the options are *unchanged*, *override to post* and *override to email*
    a. *Unchanged* – The letter will be delivered to each recipient in accordance with the delivery settings nominated for the lot, tenant or property manager.
    b. *Override to post* - If the letter must be posted, you can select to override the preferences of all recipients. All recipients with a valid postal address will then receive the letter by post only.
        i. *NOTE*: It will **not** be delivered to a recipient that has an invalid postal address. Any invalid recipients will appear under the section “Template cannot be sent to…” when generating the letter.
    c. *Override to email* - If the letter must be emailed, you can select to override the preferences of all recipients. All recipients with a valid email address will then receive the letter by email only.
        i. *NOTE*: It will **not** be delivered to a recipient that has a missing or invalid email address. Any invalid recipients will appear under the section “Template cannot be sent to…” when generating the letter.
3. Enter a subject for your email
    a. If recipients have chosen email as their preferred method for correspondence, they will receive an email with your letter attached.
    b. The specific wording of the email is configured in the Templates function>Standard email templates. The template that is automatically utilised when mail merging to lots is called *Custom Template*.
4. The option to Remove Duplicate Recipients ensures that only one letter is sent for each unique email or postal address. For example, if two lots have the same email address, only one email is sent.
5. The recipients that will receive the letter show here
6. Recipients that can’t receive the letter and the reason, show here. For example, the mailing address is missing a postcode, the lot has a missing email address or the lot does not have a property manager.
7. Select here to add attachments to your letter
8. You can customise the letter for this one instance – customising doesn’t change the template for future use
9. You can preview the document here. It’s always recommended that you preview your document before generating
10. *Generate* will trigger an email to those recipients receiving by email and create a PDF for you to print for those receiving by post. If you use Bing mailing house for postage, *Generate* will send a job immediately to Bing.



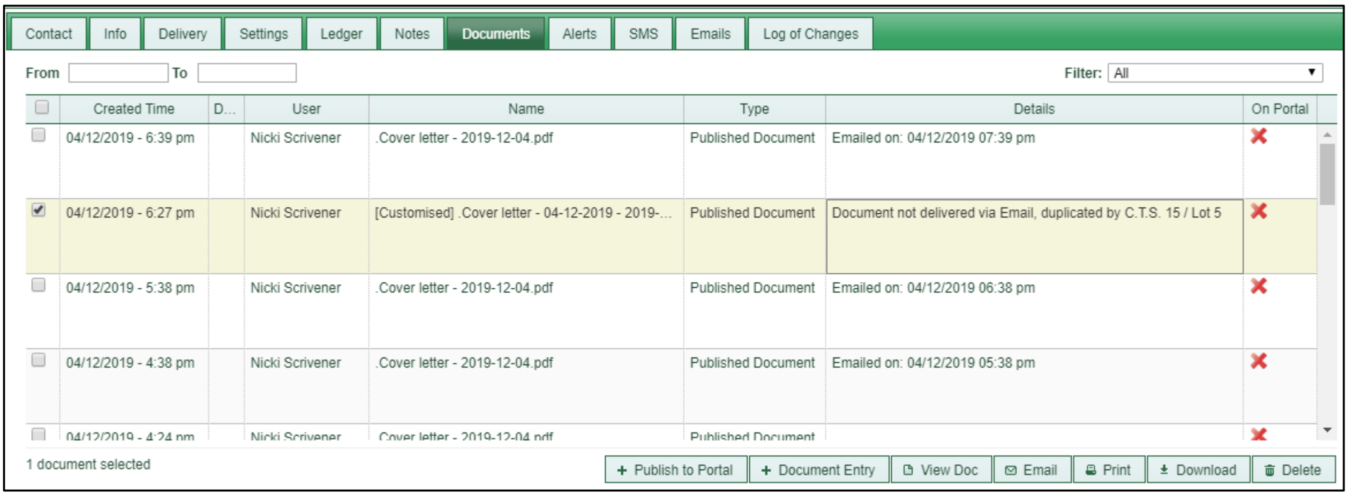
Confirm you wish to proceed



A job is created in the job centre on the right of your screen.

- **Recipients receiving by email** – the document is emailed immediately.
- **Recipients receiving by post** - a PDF document is created. You'll need to print and post these. If you use Bing Mailing house to manage postage, a job is sent immediately to Bing.

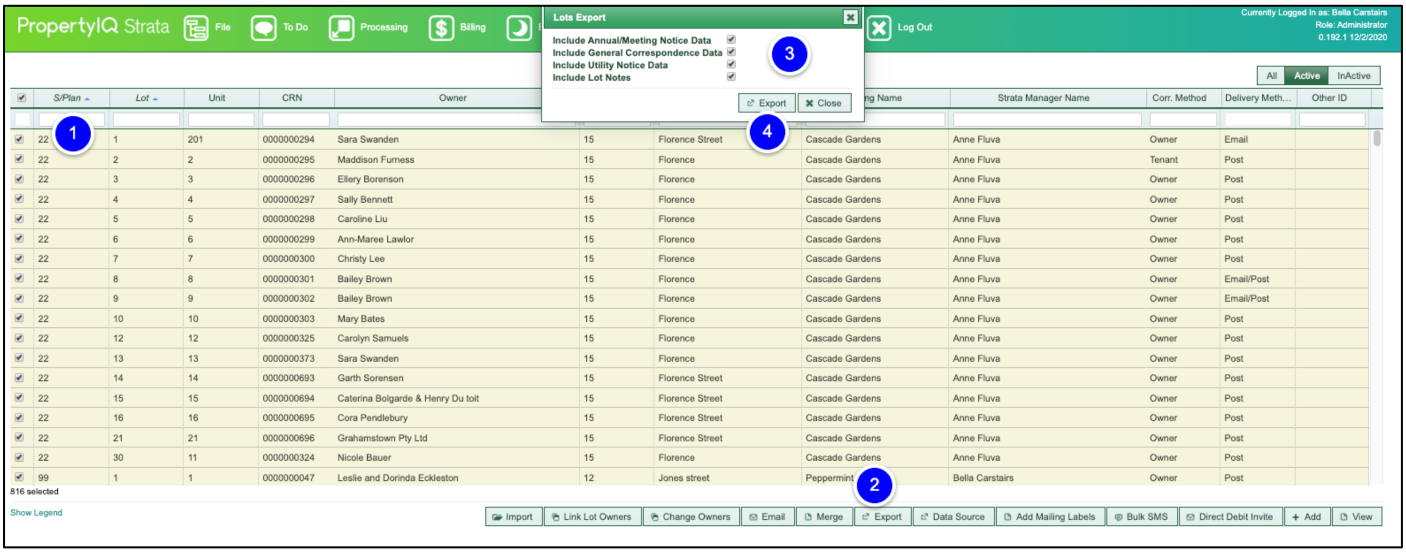
Letters sent by mail merge are **recorded on the lot card** under the documents tab.
If you selected to remove duplicate recipients, the document shows on the lot card with a note that it wasn't delivered.



EXPORTING LOT OWNER INFORMATION

You can export lot owner information to an excel spreadsheet.

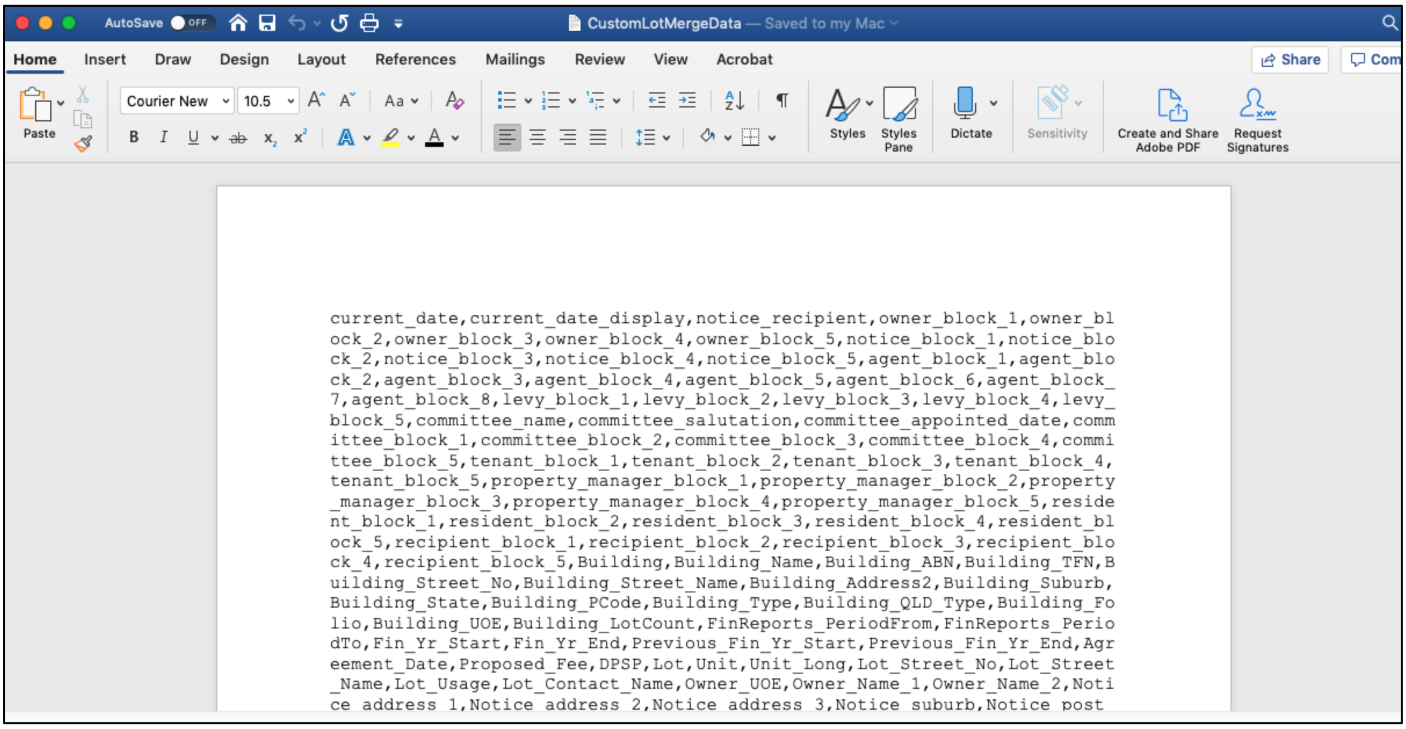
1. Select the lot owners you want to export on the screen
2. *Export*
3. Click on the boxes to include extra details if needed. You can include
   - Annual/meeting notice – the name and address of the lot's nominated meeting recipient
   - General Correspondence data – the name and address of the lot's nominated recipient for general correspondence
   - Utility notice data – the name and address of the lot's nominated utility notice recipient
   - Include lot notes – include any notes that have been made on the lot card
4. Export to create an excel spreadsheet



DATA SOURCE

Use the data source option to create a data source document in Word that contains field names and data.

You can use this data to crate merge documents in Word



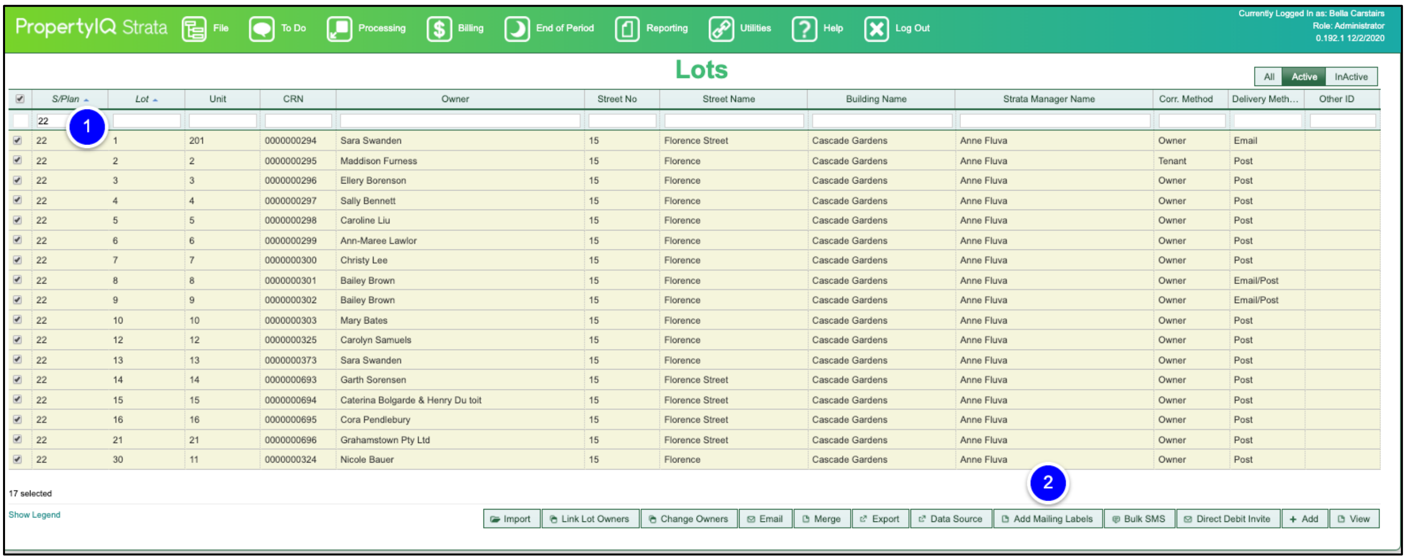
```
current_date,current_date_display,notice_recipient,owner_block_1,owner_bl
ock_2,owner_block_3,owner_block_4,owner_block_5,notice_block_1,notice_blo
ck_2,notice_block_3,notice_block_4,notice_block_5,agent_block_1,agent_blo
ck_2,agent_block_3,agent_block_4,agent_block_5,agent_block_6,agent_block_
7,agent_block_8,levy_block_1,levy_block_2,levy_block_3,levy_block_4,levy_
block_5,committee_name,committee_salutation,committee_appointed_date,comm
ittee_block_1,committee_block_2,committee_block_3,committee_block_4,commi
ttee_block_5,tenant_block_1,tenant_block_2,tenant_block_3,tenant_block_4,
tenant_block_5,property_manager_block_1,property_manager_block_2,property
_manager_block_3,property_manager_block_4,property_manager_block_5,reside
nt_block_1,resident_block_2,resident_block_3,resident_block_4,resident_bl
ock_5,recipient_block_1,recipient_block_2,recipient_block_3,recipient_blo
ck_4,recipient_block_5,Building,Building_Name,Building_ABN,Building_TFN,B
uilding_Street_No,Building_Street_Name,Building_Address2,Building_Suburb,
Building_State,Building_PCode,Building_Type,Building_QLD_Type,Building_Fo
lio,Building_UOE,Building_LotCount,FinReports_PeriodFrom,FinReports_Perio
dTo,Fin_Yr_Start,Fin_Yr_End,Previous_Fin_Yr_Start,Previous_Fin_Yr_End,Agr
eement_Date,Proposed_Fee,DPSP,Lot,Unit,Unit_Long,Lot_Street_No,Lot_Street
_Name,Lot_Usage,Lot_Contact_Name,Owner_UOE,Owner_Name_1,Owner_Name_2,Noti
ce_address_1,Notice_address_2,Notice_address_3,Notice_suburb,Notice_post
```

ADD MAILING LABELS

To create a job that can later be printed from the Mailing Labels centre:

1. Select the lots you want to create mailing labels for
2. Select *Add mailing labels*.

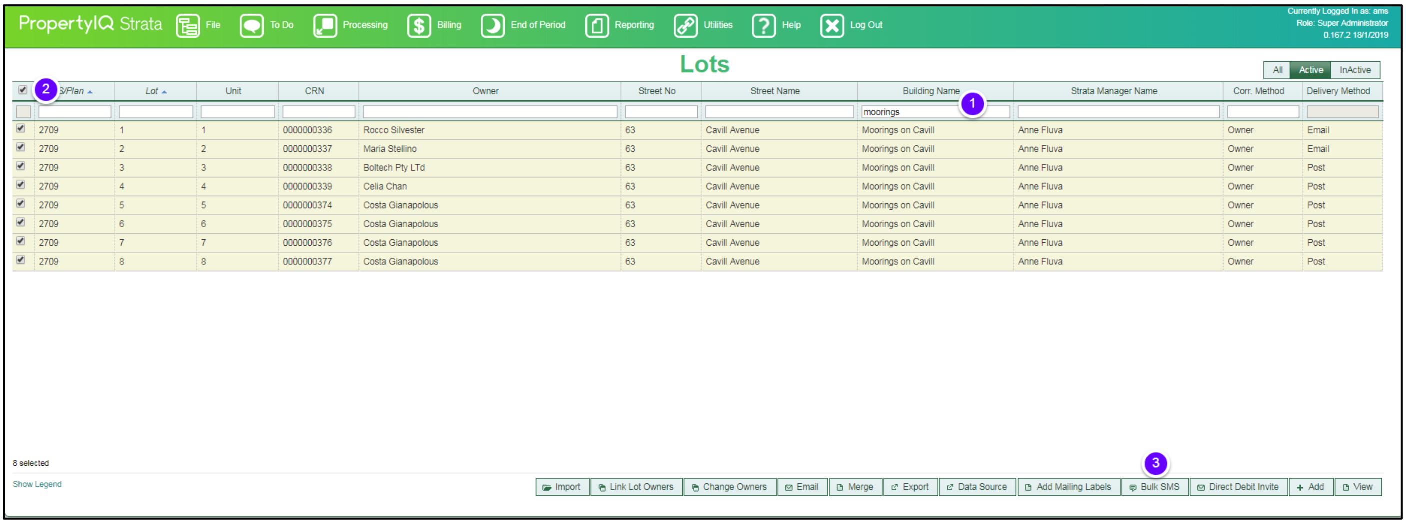
Print your labels later from the Mailing Labels centre under the Utilities menu



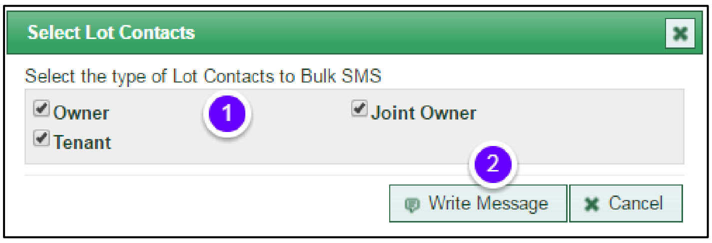
BULK SMS

If you have bulk SMS enabled on your account, you can bulk SMS lot owners from the lot screen

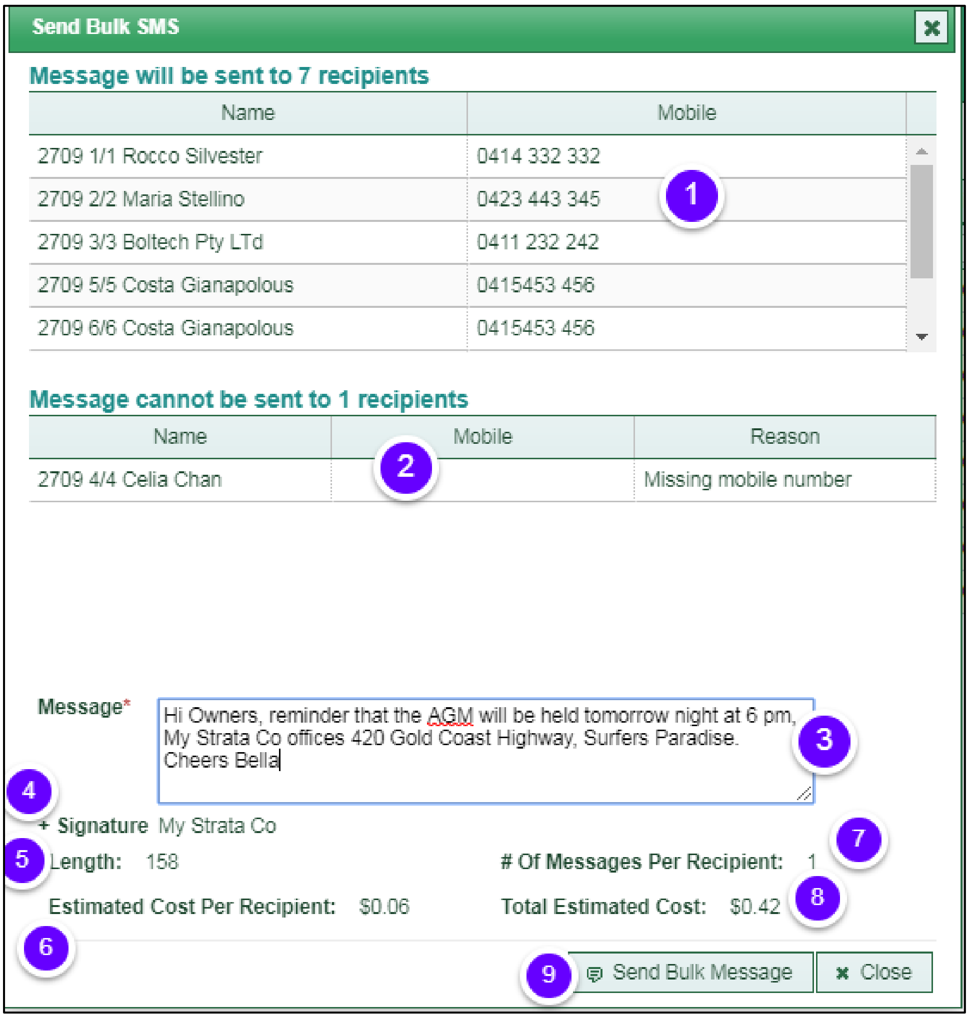
1. Enter some key letters to refine your search. This example shows how your screen looks if you are sending an SMS to all lot owners in a specific building.
2. Tick here to select all owners on the screen, or tick one by one if you only want to send a message to some of the owners.
3. Select *Bulk SMS*



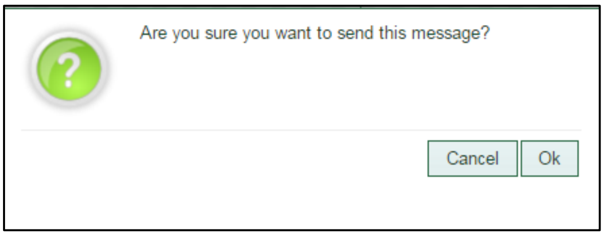
1. Select the types of contacts you want to send the SMS to
2. Select *Write Message*

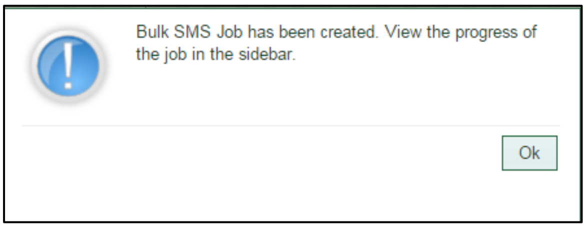


1. This message shows you the number of contacts with a valid mobile number. Note: The number shown will always be the first number for each lot owner.
2. This message shows you the number of contacts with a missing or invalid mobile number
3. Enter your message here. Make sure you keep it brief (see note about pricing at the beginning of this manual)
4. The number of characters in your SMS shows here
5. The total length of your message shows here. In this example, the message is less that 160 characters so the charge will be for one SMS
6. The estimated cost per recipient shows here
7. The number of messages per recipient shows here
8. The total estimated cost for all messages shows here
9. Select *Send Bulk Message*



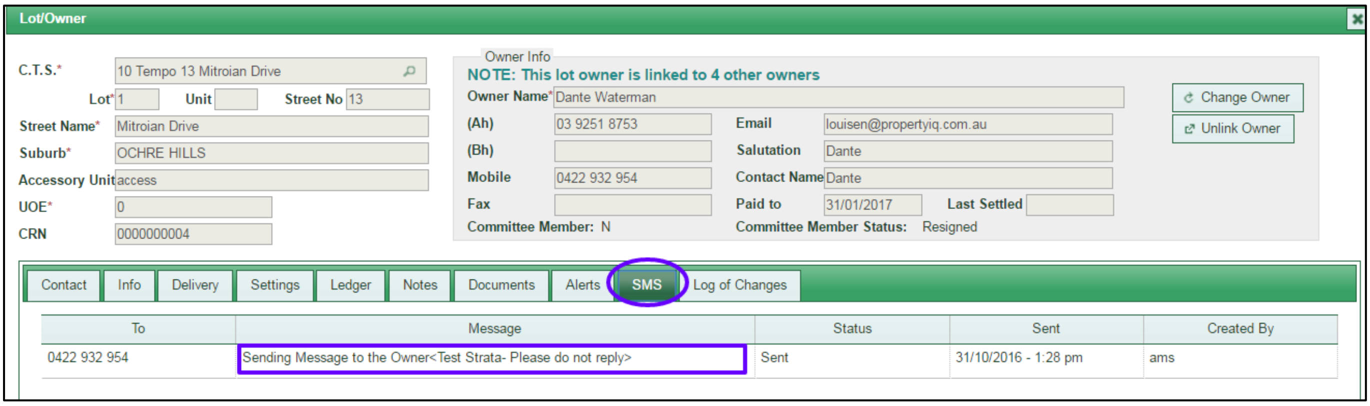
Confirm you wish to send the message





The job will now be created in the job centre on the right side of your screen.

All SMS messages that have been sent to a lot owner will be automatically saved under the SMS tab on each lot owner's card.



DIRECT DEBIT INVITATION

If you have enabled BIDD (Macquarie Direct Debit), you can trigger a bulk direct debit invitation from DEFT here.

You'll need to have each lot members permission before sending though.

For full details about BIDD see the manual *Macquarie Direct Debit.*