



Lot owners screen

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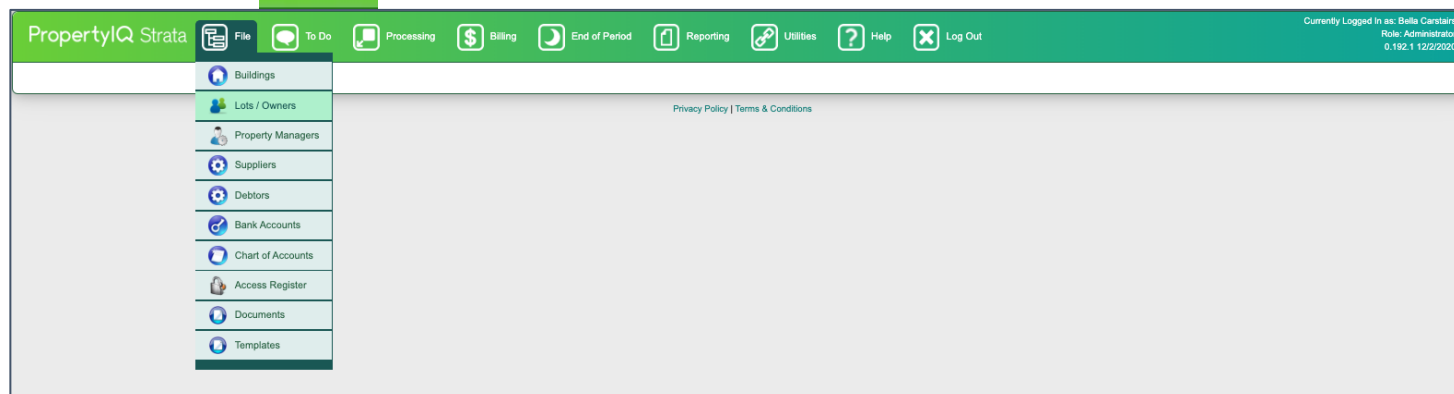
INTRODUCTION

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 All
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 Customer 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: admin Role: Super Administrator 0.150.9.27022016

Lots

	C.T.S	Lot	Unit	CRN	Owner	Street No	Street Name	Building Name	Strata Manager Name	Corr. Method	Delivery Method
29	1	1	1	0000000047	Amelia Wright	1a	Jones street	Peppermint Gardens	Adrian Bolton	Owner	Post
99	2	2	2	0000000254	Penelope George	12	Pine Avenue	Peppermint Gardens	Adrian Bolton	Owner	Post
99	6	66	66	0000000728	Geddy Concrete Pty Ltd	12	Pine Avenue	Peppermint Gardens	Adrian Bolton	Owner	Post
137	1	1	1	0000000644	Ella Carter	79	O'Sullivan Road	Darmlay	Anne Fluva	Owner	Post
691	45	45	45	0000000249	Anna Georgiopolos	1-7	1-8 Pye Street	Aurora Tower	Anne Fluva	Owner	Email
691	94	94	94	0000000250	Ryvate Pty Ltd	1-7	1-8 Pye Street	Aurora Tower	Anne Fluva	Owner	Email
692	12	12	12	0000000251	Charlie Alexander	2-10	Pye St	Skyline	Anne Fluva	Owner	Email/Post
692	19	19	19	0000000252	Emily Beard	2-10	Pye St	Skyline	Anne Fluva	Other	Email/Post
692	20	20	20	0000000253	Mitchell Family Trust	2-10	Pye St	Skyline	Anne Fluva	Other	Email/Post
693	10	101	101	0000000258	Alex Woolbank	11	James Street	Infinity Tower	Anne Fluva	Owner	Email/Post
693	12	102	102	0000000259	Benjamin Green	11	James Street	Infinity Tower	Anne Fluva	Owner	Email/Post
694	1	1	1	0000000283	Courtney Smith	12	Long Street	Skytower	Jeremiah Fulstone	Owner	Post
777	1	1	1	0000000658	Gregg Smith	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
777	2	2	2	0000000659	Charlie Alexander	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
777	3	3	3	0000000660	Frank Jones	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
777	4	4	4	0000000661	Joseph Gauci	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
777	5	5	5	0000000662	Brad Simms	7	Lucky Road	Southern Cross	Bella Carstairs	Owner	Post
900	1	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

- Click on the Import button
- 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 2077	mystratacustomers@gmail	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														

- 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.
- 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

(Skip)	(Skip)	(Skip)
SP	(Skip)	Building-Address2
434544333	S/Plan	
434544333	Street No	
434544333	Street Name	
	Phone 1	
	Phone 2	
	Fax	
	Mobile	
	Mailing Address 1	

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

Import Lots

Filename: Import Lot owners.xlsx Find File (2)

Selected Field Information

☒ First Row Contains Field Names (3)

Owner Name	UOE	Lot#	Unit#	SR	Building-Address1	Building-Address2	Building-Address3	Owner-Address1	Owner-Address2	Owner-Address3	Email	Deliver-email	Deliver-Post
Jackie Swain	15	14	14	434544333	15 Florence Ave...		HORNSBY NSW ...	Unit 14, 15 Flore...		HORNSBY NSW ...	mystratacustome...	y	N
Victor Mawson	10	15	15	434544333	15 Florence Ave...		HORNSBY NSW ...	Unit 14, 15 Flore...		HORNSBY NSW ...		n	y
Joanna Firucane	10	16	16	434544333	15 Florence Ave...		HORNSBY NSW ...	Unit 15, 15 Floren...		HORNSBY NSW ...		y	y

Import (5) Close

99	99	0000000213	Jocelyn Dante	1	Hollywood Drive		The Bachelor Pad		Lea Mac		Owner	Post
16	16	0000000134	John Smith	1	Ingram Place		The Bachelor Pad		Lea Mac		Owner	Post
1	1	0000000074	Barry Morgan	1	Park Lane		Scott's Mansion		Ashley Jones		Owner	Post
2	2	0000000075	Fran Cousins	1	Park Lane		Scott's Mansion		Ashley Jones		Owner	Post
3	3	0000000076	Meredith McIntyre	1	Park Lane		Scott's Mansion		Ashley Jones		Owner	Post
4	4	0000000133	Jane Doe	1	Park Lane		Scott's Mansion		Ashley Jones		Owner	Post

Import (1) Link Lot Owners Change Owners Email Merge Export Data Source Add Mailing Labels Bulk SMS Add View

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

The screenshot shows the 'PropertyIQ Strata' application interface. On the left, there is a sidebar with various icons. The main window is divided into two panes. The left pane is titled 'Link Lot Owners' and contains two buttons: 'Select Primary Lot Owner' (labeled with a red circle 2) and 'Select Lot Owners to Link'. The right pane is titled 'Lots' and displays a table of lot owners. The table has columns: S/Pla, Lot, Unit, CRN, Owner, Str, Street Name, Building Na, Strata Manager N..., Corr..., and Deliv... (labeled with a red circle 3). The first row of the table shows '4345', '1', '1', '000...', 'Franca Swindells', '15', 'Florence', 'Hornsby To...', 'Training Manager', 'Own...', and 'Post'. At the bottom of the 'Link Lot Owners' dialog, there is a 'Link Lot Owners' button (labeled with a red circle 1) and a 'Close' button. The bottom of the main window has a toolbar with buttons for 'Import', 'Link Lot Owners', 'Change Owners', 'Email', 'Merge', 'Export', 'Data Source', 'Add Mailing Labels', 'Bulk SMS', 'Add', and 'View'.

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.

Link Lot Owners

Select Primary Lot Owner

All the lot owners selected below will be updated with this owners information.

Owner ...	Email	(Ah)	(Bh)	Mobile	Addr1	Addr2	Addr3	Portal ...
Franca...	fayelynettegoo...			0423 3...	Unit 1/15 Florence Ave			✓

4

Select Lot Owners to Link

Owner ...	Email	(Ah)	(Bh)	Mobile	Addr1	Addr2	Addr3	Portal ...

Link Lot Owners

Close

Lots

S/Pi...	Lot ...	Unit	CRN	Owner	Stre...	Street Name	Building Na...	Strata Manager N...	Corr...	Del...
434...	1	1	000...	FRANCA	15	Florence	Hornsby To...	Training Manager	Own...	Post
434...	13	13	000...	Franca Swindells	15	Florence	Hornsby To...	Training Manager	Own...	Post

5

View

Select(1)

Close

Import

Link Lot Owners

Change Owners

Email

Merge

Export

Data Source

Add Mailing Labels

Bulk SMS

Add

View

- 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.

Link Lot Owners

Select Primary Lot Owner

All the lot owners selected below will be updated with this owners information.

Owner ...	Email	(Ah)	(Bh)	Mobile	Addr1	Addr2	Addr3	Portal ...
Franca...	fayelynettegoo...			0423 3...	Unit 1/15 Florence Ave			✓

Select Lot Owners to Link

Owner ...	Email	(Ah)	(Bh)	Mobile	Addr1	Addr2	Addr3	Portal ...
Franca...					Unit 13, 15 Florence Aven...			✗

6

Link Lot Owners

Close

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

?

WARNING: This will overwrite all the owners information in all the selected Lots, with the primary Lot owner's details.

Are you sure you want to continue?

No

Yes

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*

PropertyIQ Strata

File To Do Processing Billing End of Period Utilities Log Out

Currently Logged in as: Faye Goodman
Role: Administrator
6.137.0.202/2017

Lots

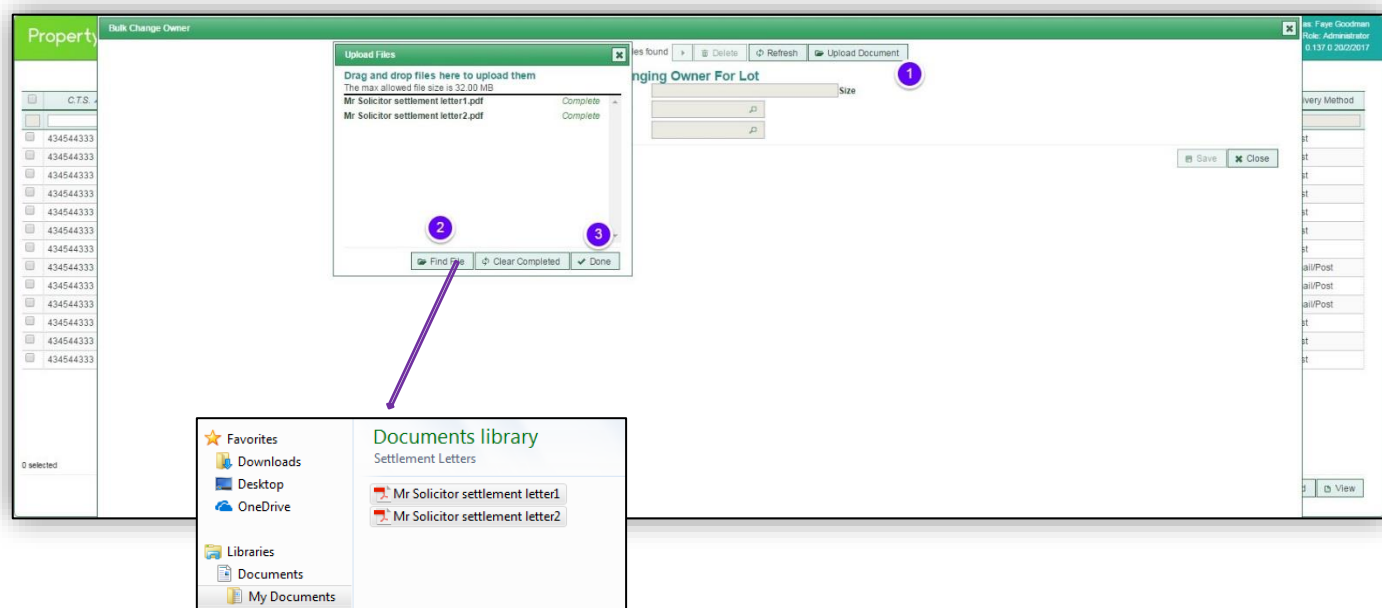
	CTS	Lot	Unit	CRN	Owner	Street No	Street Name	Building Name	Strata Manager Name	Corr. Method	Delivery Method
<input type="checkbox"/>	434544333	1	1	0000000294	Franca Swindells	15	Florence	Hornsby Towers	Training Manager	Owner	Post
<input checked="" type="checkbox"/>	434544333	2	2	0000000295	Maddison Furness	15	Florence	Hornsby Towers	Training Manager	Owner	Post
<input checked="" type="checkbox"/>	434544333	3	3	0000000296	Brendan Tang	15	Florence	Hornsby Towers	Training Manager	Owner	Post
<input type="checkbox"/>	434544333	4	4	0000000297	Sally Bennett	15	Florence	Hornsby Towers	Training Manager	Owner	Post
<input type="checkbox"/>	434544333	5	5	0000000298	Caroline Liu	15	Florence	Hornsby Towers	Training Manager	Owner	Post
<input type="checkbox"/>	434544333	6	6	0000000299	Ann-Maree Lawlor	15	Florence	Hornsby Towers	Training Manager	Owner	Post
<input type="checkbox"/>	434544333	7	7	0000000300	Christy Lee	15	Florence	Hornsby Towers	Training Manager	Owner	Post
<input type="checkbox"/>	434544333	8	8	0000000301	Bailey Brown	15	Florence	Hornsby Towers	Training Manager	Owner	EmailPost
<input type="checkbox"/>	434544333	9	9	0000000302	Bailey Brown	15	Florence	Hornsby Towers	Training Manager	Owner	EmailPost
<input type="checkbox"/>	434544333	10	10	0000000303	Bailey Brown	15	Florence	Hornsby Towers	Training Manager	Owner	EmailPost
<input type="checkbox"/>	434544333	11	11	0000000324	Nicole Bauer	15	Florence	Hornsby Towers	Training Manager	Owner	Post
<input type="checkbox"/>	434544333	12	12	0000000325	Carolyn Samuels	15	Florence	Hornsby Towers	Training Manager	Owner	Post
<input type="checkbox"/>	434544333	13	13	0000000373	Franca Swindells	15	Florence	Hornsby Towers	Training Manager	Owner	Post

2 selected

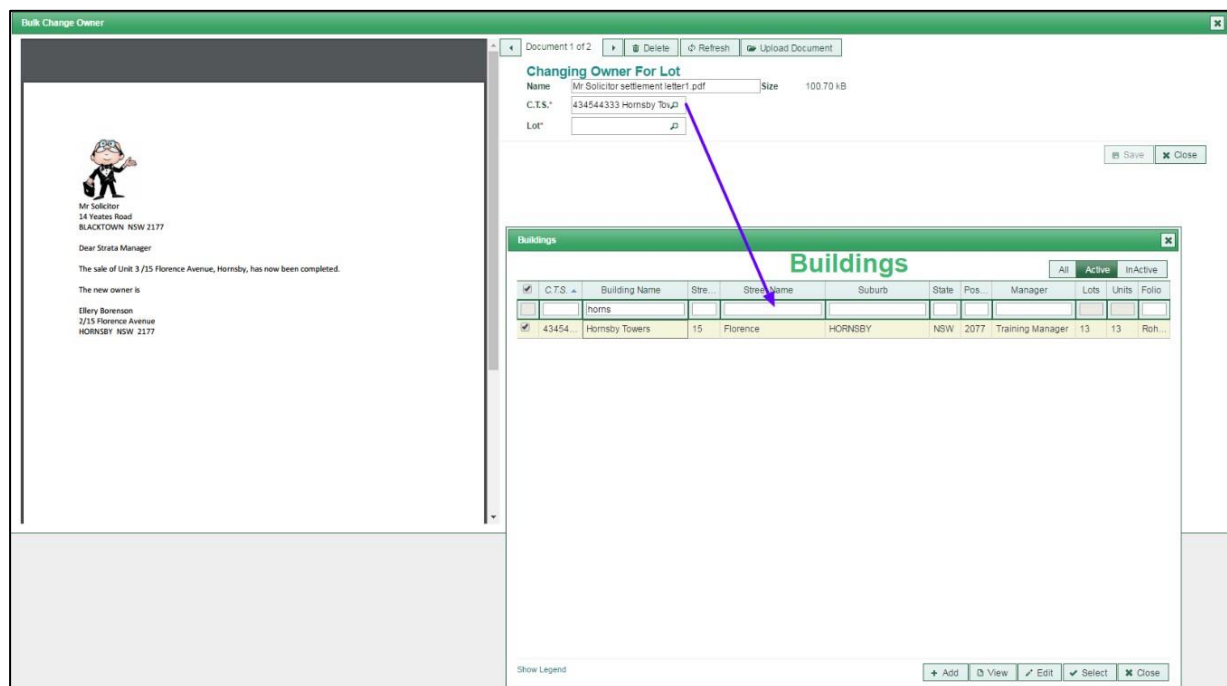
Import Link Lot Owners Change Owners Email Merge Export Data Source Add Mailing Labels Bulk SMS Add View

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.

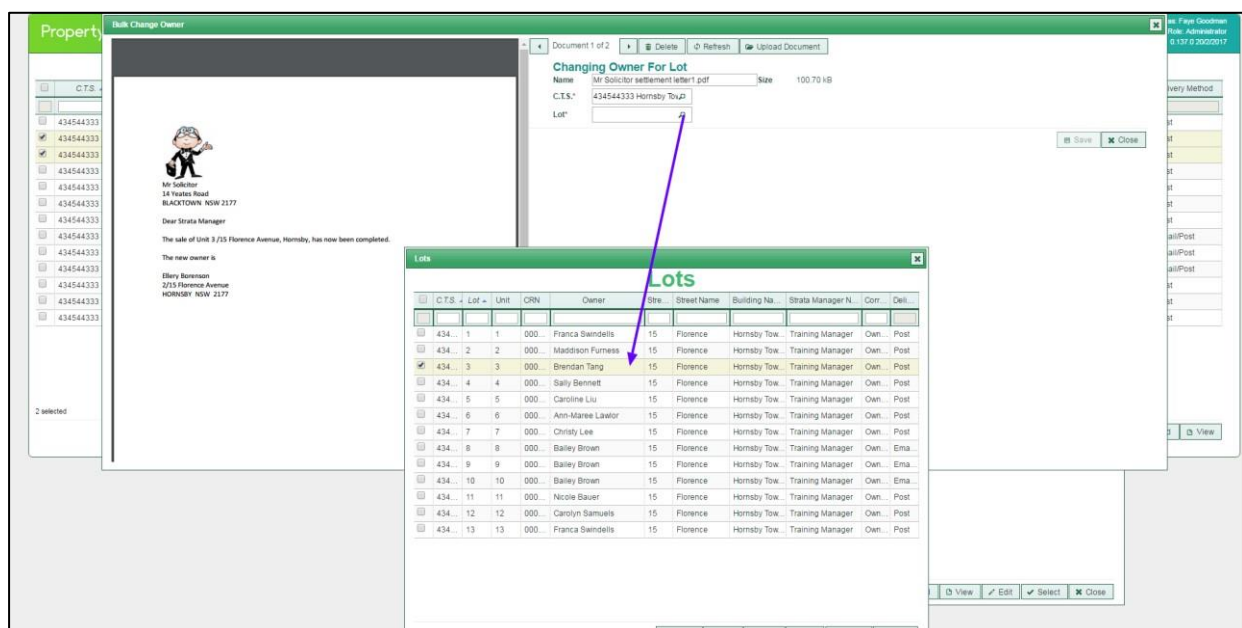
1. Click on *Upload Document*
2. Click on *Find File* to search for the files. You can select your files in bulk by clicking on the first file you want, holding the control key and then clicking on the last file you want
3. Click *Done* when you are finished uploading files



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, click 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.

Property Managers

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

If the property manager is already recorded on the programme, click and then double click to select them, or you can click on Add to add a new property manager

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*

PropertyIQ Strata

File To Do Processing Billing End of Period Utilities Log Out

Currently Logged in as: Faye Goodwin
Role: Administrator
0.137.0 26/2/2017

Lots

	CTS	Lot	Unit	CRN	Owner	Street No	Street Name	Building Name	Strata Manager Name	Conn. Method	Delivery Method
<input type="checkbox"/>								moor			
<input checked="" type="checkbox"/>	270976	1	1	0000000336	Rocco Silvester	63	Cavill Avenue	Moorings on Cavill	Training Manager	Owner	Post
<input checked="" type="checkbox"/>	270976	2	2	0000000337	Maria Stellino	63	Cavill Avenue	Moorings on Cavill	Training Manager	Owner	Post
<input type="checkbox"/>	270976	3	3	0000000338	Bollech Pty Ltd	63	Cavill Avenue	Moorings on Cavill	Training Manager	Owner	Post
<input checked="" type="checkbox"/>	270976	4	4	0000000339	Celia Chan	63	Cavill Avenue	Moorings on Cavill	Training Manager	Owner	Post

3 selected

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

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

Reminder about Pool Use Rules

Bcc: faye@propertyiq.com.au, mystratacustomers@gmail.com, mystratacustomers@gmail.com

Reminder about Pool Use Rules

Hello everyone,

Just reminding you that the pool area is now closed after 8 pm.

Kind Regards

Regina Brown
Strata Manager

Send



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*

The screenshot shows the PropertyIQ Strata interface. At the top is a navigation bar with icons for File, To Do, Processing, Billing, End of Period, Reporting, Utilities, Help, and Log Out. The main header is 'Lots' with tabs for All, Active, and InActive. Below the header is a table with columns: S/Plan, Unit, CRN, Owner, Street No, Street Name, Building Name, Strata Manager Name, Corr. Metho..., Delivery Me..., and Other ID. The table contains 17 rows of lot data. A modal dialog box titled 'Select Lot Recipient' is open, showing options to select the type of lot recipient to merge: Owner (checked), Tenant, Property Manager, and Occupant. The dialog has 'Merge' and 'Cancel' buttons. At the bottom of the screen, there is a toolbar with buttons for Import, Link Lot Owners, Change Owners, Email, Merge, Export, Data Source, Add Mailing Labels, Bulk SMS, Direct Debit Invite, Add, and View. A status bar at the bottom left indicates '17 selected' and 'Show Legend'.

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

The screenshot displays the PropertyIQ Strata software interface. A 'Custom Merge Templates' dialog box is open, showing a list of templates. The templates are organized into columns: Name, Type, and a third column with checkboxes. The templates include 'A. Committee letter', 'Postal Ballot letter', 'A Pest Inspection letter My Strata Co', 'a Sign out access item', 'ABC Insurance Claim', 'ABD insurance claim', 'Advise after hours emergency contact', 'Arrears cover page', 'Arrears cover sheet!', 'Ballot Paper', 'Base template', 'Base template - copy', 'Base template - gen corr', 'Base template - Letter to Building', 'Base Template - My Strata Co', 'Base Template for Training', 'Base template My strata co', 'Base Template my strata co', and 'Base template My strata co - o'. The 'A Pest Inspection letter My Strata Co' template is highlighted. Numbered callouts 1 through 6 indicate the steps: 1. Click on a template, 2. Click 'New', 3. Click 'Clone', 4. Click 'Edit', 5. Click 'Select', and 6. Click 'Preview'. The background shows a table of strata data with columns for S/Plan, Lot, Unit, CRN, and Owner. The bottom of the interface has a toolbar with buttons for Import, Link Lot Owners, Change Owners, Email, Merge, Export, Data Source, Add Mailing Labels, Bulk SMS, Direct Debit Invoice, Add, and View.

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.

Custom Template Merge

Current Selected Template: Pest Inspection

Template Type: Existing Template

Notice Size:

Delivery:
☒ Unchanged
☐ Override to Post
☐ Override to Email

Email Subject: Pest Inspection

Remove Duplicate Recipients ☐

Template will be sent to 90 recipients

S/Plan	Lot	Name	Recipient	Delivery
75486	1	Drew Hendry	Owner	Post
75486	2	Rachel Winters	Owner	Post
65236	1	Jermaine Carter	Owner	Post
65236	2	Matthew Booth	Owner	Post
1	1	Brena Mulligan	Owner	Email/Post
1	4	Penny Gardiner	Owner	Email/Post
1	3	Brena Mulligan	Owner	Email

Template cannot be sent to 13 recipients

S/...	Lot	Name	Recipient	Reason	Deliv...
1	2	Caz test	Owner	Missing owner subur...	Post
6554	1	Julia Chan	Owner	Missing owner postco...	Post
6554	2	Julia Chan	Owner	Missing owner postco...	Post
6554	3	Julia Chan	Owner	Missing owner postco...	Post
25...	1	Ben Gayand	Owner	Missing owner subur...	Post
25...	2	Paula Vincent	Owner	Missing owner subur...	Post
...	3	Lia Lau	Owner	Missing owner subur...	Post

Attachments

Customise

Preview

Generate

Close

Confirm you wish to proceed

FINAL WARNING - Custom Templates will be delivered.

Cancel to make amendments.

Proceed to send this job to the BG Server. Once finished it will appear in the Completed section of the sidebar.

✕ Cancel

➡ 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.

Contact	Info	Delivery	Settings	Ledger	Notes	Documents	Alerts	SMS	Emails	Log of Changes
From <input type="text"/> To <input type="text"/> Filter: All										
<input type="checkbox"/>	Created Time	D...	User	Name	Type	Details	On Portal			
<input type="checkbox"/>	04/12/2019 - 6:39 pm		Nicki Scrivener	.Cover letter - 2019-12-04.pdf	Published Document	Emailed on: 04/12/2019 07:39 pm	✖			
<input checked="" type="checkbox"/>	04/12/2019 - 6:27 pm		Nicki Scrivener	[Customised] .Cover letter - 04-12-2019 - 2019-...	Published Document	Document not delivered via Email, duplicated by C.T.S. 15 / Lot 5	✖			
<input type="checkbox"/>	04/12/2019 - 5:38 pm		Nicki Scrivener	.Cover letter - 2019-12-04.pdf	Published Document	Emailed on: 04/12/2019 06:38 pm	✖			
<input type="checkbox"/>	04/12/2019 - 4:38 pm		Nicki Scrivener	.Cover letter - 2019-12-04.pdf	Published Document	Emailed on: 04/12/2019 05:38 pm	✖			
<input type="checkbox"/>	04/12/2019 - 4:24 pm		Nicki Scrivener	.Cover letter - 2019-12-04.pdf	Published Document		✖			
1 document selected							<div><div>+ Publish to Portal</div><div>+ Document Entry</div><div>📄 View Doc</div><div>✉ Email</div><div>🖨 Print</div><div>⬇ Download</div><div>🗑 Delete</div></div>			

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

PropertyIQ Strata File To Do Processing Billing Log Out

Currently Logged In as: Bella Carstairs
Role: Administrator
0.152.1.12/2020

Lots Export

☒ Include Annual/Meeting Notice Data
☒ Include General Correspondence Data
☒ Include Utility Notice Data
☒ Include Lot Notes

Export Close

	S/Plan	Lot	Unit	CRN	Owner		Strata Manager Name	Corr. Method	Delivery Meth...	Other ID	
<input checked="" type="checkbox"/>	22	1	201	0000000294	Sara Swanden	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Email
<input checked="" type="checkbox"/>	22	2	2	0000000295	Maddison Furness	15	Florence	Cascade Gardens	Anne Fluva	Tenant	Post
<input checked="" type="checkbox"/>	22	3	3	0000000296	Elery Borenson	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	4	4	0000000297	Sally Bennett	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	5	5	0000000298	Caroline Liu	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	6	6	0000000299	Ann-Maree Lawlor	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	7	7	0000000300	Christy Lee	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	8	8	0000000301	Bailey Brown	15	Florence	Cascade Gardens	Anne Fluva	Owner	Email/Post
<input checked="" type="checkbox"/>	22	9	9	0000000302	Bailey Brown	15	Florence	Cascade Gardens	Anne Fluva	Owner	Email/Post
<input checked="" type="checkbox"/>	22	10	10	0000000303	Mary Bates	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	12	12	0000000325	Carolyn Samuels	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	13	13	0000000373	Sara Swanden	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	14	14	0000000693	Garth Sorensen	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	15	15	0000000694	Caterina Bolgarde & Henry Du toit	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	16	16	0000000695	Cora Pendlebury	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	21	21	0000000696	Grahamstown Pty Ltd	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	22	30	11	0000000324	Nicole Bauer	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	99	1	1	0000000047	Leslie and Dorinda Eckleston	12	Jones street	Peppermint	Bella Carstairs	Owner	Post

816 selected

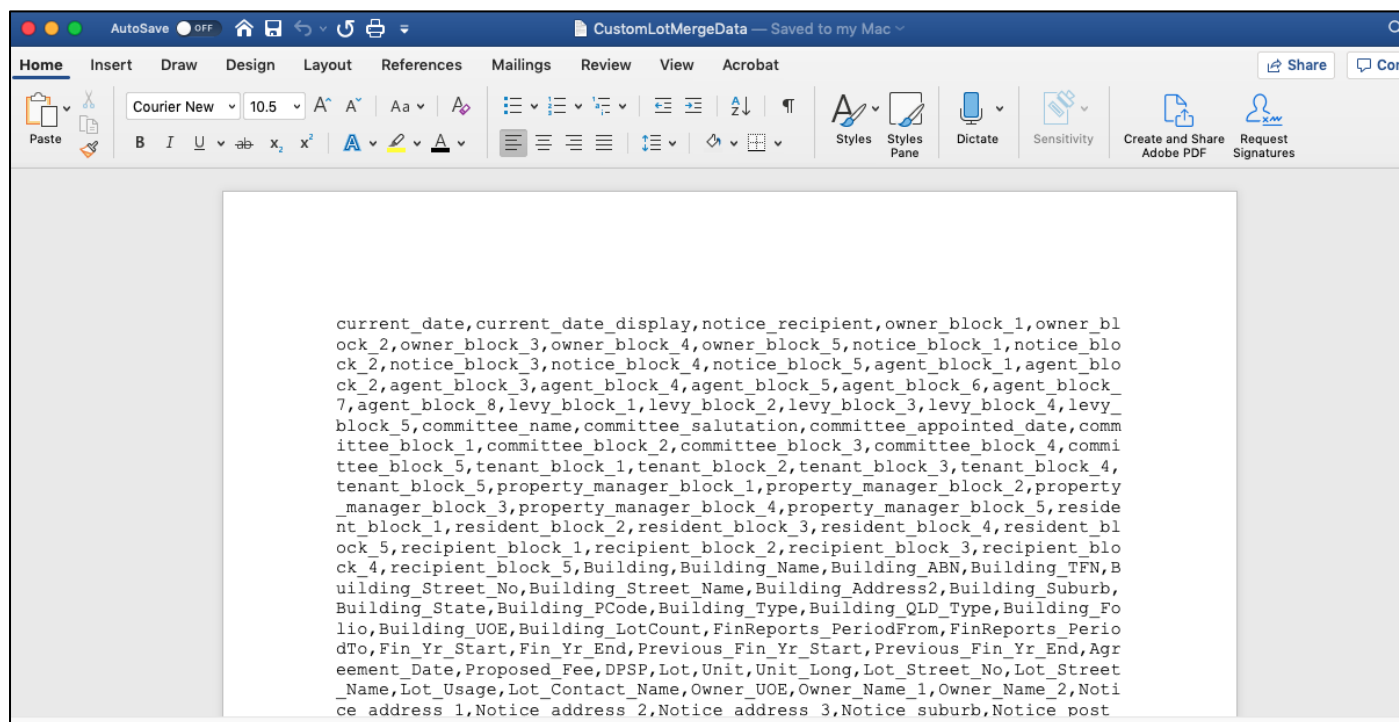
Show Legend

☒ Import
 ☒ Link Lot Owners
 ☒ Change Owners
 ☒ Email
 ☒ Merge
 ☒ Export
 ☒ Data Source
 ☒ Add Mailing Labels
 ☒ Bulk SMS
 ☒ Direct Debit Invite
 ☒ Add
 ☒ View

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 create merge documents in Word



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

PropertyIQ Strata
File
To Do
Processing
Billing
End of Period
Reporting
Utilities
Help
Log Out
Currently Logged In as: Bella Gantiers
Role: Administrator
0.192.1.12/2/2020

Lots

All Active InActive

<input checked="" type="checkbox"/>	S/Plan	Lot	Unit	CRN	Owner	Street No	Street Name	Building Name	Strata Manager Name	Corr. Method	Delivery Meth...	Other ID
<input checked="" type="checkbox"/>	22	1	201	0000000294	Sara Swanden	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Email	
<input checked="" type="checkbox"/>	22	2	2	0000000295	Maddison Furness	15	Florence	Cascade Gardens	Anne Fluva	Tenant	Post	
<input checked="" type="checkbox"/>	22	3	3	0000000296	Ellery Borenson	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	4	4	0000000297	Sally Bennett	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	5	5	0000000298	Caroline Liu	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	6	6	0000000299	Ann-Maree Lawlor	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	7	7	0000000300	Christy Lee	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	8	8	0000000301	Bailey Brown	15	Florence	Cascade Gardens	Anne Fluva	Owner	Email/Post	
<input checked="" type="checkbox"/>	22	9	9	0000000302	Bailey Brown	15	Florence	Cascade Gardens	Anne Fluva	Owner	Email/Post	
<input checked="" type="checkbox"/>	22	10	10	0000000303	Mary Bates	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	12	12	0000000325	Carolyn Samuels	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	13	13	0000000373	Sara Swanden	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	14	14	0000000693	Garth Sorensen	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	15	15	0000000694	Caterina Bolgarde & Henry Du toit	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	16	16	0000000695	Cora Pendlebury	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	21	21	0000000696	Grahamstown Pty Ltd	15	Florence Street	Cascade Gardens	Anne Fluva	Owner	Post	
<input checked="" type="checkbox"/>	22	30	11	0000000324	Nicole Bauer	15	Florence	Cascade Gardens	Anne Fluva	Owner	Post	

17 selected
Show Legend

Import
Link Lot Owners
Change Owners
Email
Merge
Export
Data Source
Add Mailing Labels
Bulk SMS
Direct Debit Invite
Add
View

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**

PropertyIQ Strata

File To Do Processing Billing End of Period Reporting Utilities Help Log Out

Currently Logged In as: admin
Role: Super Administrator
0.167.2.19/1/2019

Lots

	Lot	Unit	CRN	Owner	Street No	Street Name	Building Name	Strata Manager Name	Corr. Method	Delivery Method	
<input checked="" type="checkbox"/>	2709	1	1	0000000336	Rocco Silvester	63	Cavill Avenue	Moorings on Cavill	Anne Fluva	Owner	Email
<input checked="" type="checkbox"/>	2709	2	2	0000000337	Maria Stellino	63	Cavill Avenue	Moorings on Cavill	Anne Fluva	Owner	Email
<input checked="" type="checkbox"/>	2709	3	3	0000000338	Bottech Pty Ltd	63	Cavill Avenue	Moorings on Cavill	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	2709	4	4	0000000339	Celia Chan	63	Cavill Avenue	Moorings on Cavill	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	2709	5	5	0000000374	Costa Gianapolous	63	Cavill Avenue	Moorings on Cavill	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	2709	6	6	0000000375	Costa Gianapolous	63	Cavill Avenue	Moorings on Cavill	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	2709	7	7	0000000376	Costa Gianapolous	63	Cavill Avenue	Moorings on Cavill	Anne Fluva	Owner	Post
<input checked="" type="checkbox"/>	2709	8	8	0000000377	Costa Gianapolous	63	Cavill Avenue	Moorings on Cavill	Anne Fluva	Owner	Post

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

Select Lot Contacts

Select the type of Lot Contacts to Bulk SMS

☒ Owner ☒ Joint Owner ☒ Tenant

Write Message Cancel

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 than 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*

Send Bulk SMS

Message will be sent to 7 recipients

Name	Mobile
2709 1/1 Rocco Silvester	0414 332 332
2709 2/2 Maria Stellino	0423 443 345
2709 3/3 Boltech Pty LTd	0411 232 242
2709 5/5 Costa Gianapolous	0415453 456
2709 6/6 Costa Gianapolous	0415453 456

Message cannot be sent to 1 recipients

Name	Mobile	Reason
2709 4/4 Celia Chan		Missing mobile number

Message*

Hi Owners, reminder that the AGM will be held tomorrow night at 6 pm, My Strata Co offices 420 Gold Coast Highway, Surfers Paradise. Cheers Bella

+ Signature My Strata Co

Length: 158

Estimated Cost Per Recipient: \$0.06

Of Messages Per Recipient: 1

Total Estimated Cost: \$0.42

Send Bulk Message

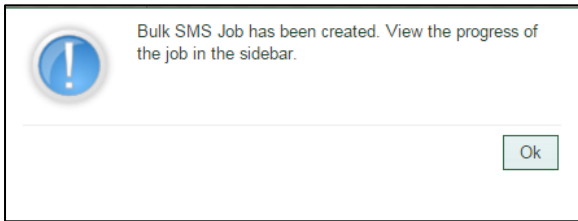
Close

Confirm you wish to send the message

Are you sure you want to send this message?

Cancel

Ok



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.

Lot/Owner

C.T.S.* 10 Tempo 13 Mitroian Drive

Lot* 1 Unit Street No 13

Street Name* Mitroian Drive

Suburb* OCHRE HILLS

Accessory Unit access

UOE* 0

CRN 0000000004

Owner Info

NOTE: This lot owner is linked to 4 other owners

Owner Name* Dante Waterman

(Ah) 03 9251 8753 Email louisen@propertyiq.com.au

(Bh) Salutation Dante

Mobile 0422 932 954 Contact Name Dante

Fax Paid to 31/01/2017 Last Settled

Committee Member: N Committee Member Status: Resigned

[Change Owner](#) [Unlink Owner](#)

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

To	Message	Status	Sent	Created By
0422 932 954	Sending Message to the Owner<Test Strata- Please do not reply>	Sent	31/10/2016 - 1:28 pm	ams

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*.