



Portal Guide for Strata Managers

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GETTING STARTED

These instructions are for strata managers using the PropertyIQ Portal. The “Portal guide for users” manual contains information and instructions for your lot owners and committee council members to access and use the portal.

The portal is an independent web-based application that synchronises with your PropertyIQ database and makes information from your PropertyIQ database available for your lot owners and committee/council members to view. Your company controls the information that is made available to your lot owners and committee/council members.



You can login to the PropertyIQ Portal here: <https://portal.propertyiq.com.au/login>

PORTAL ONBOARDING STEPS

1. Email support@propertyiq.com.au and ask for the portal be activated. You'll need to provide the following information:
 - Your company's trading name and legal entity name.
 - A contact and email address from your company that will be your nominated portal account administrator. When creating your portal administrator account for the portal, the email used **cannot be the same** as an email used for any lot or committee/council members in PropertyIQ. This includes resigned committee members and lots attached to an inactive building.

This would be best set up with a **Unique Email Account** which will become the username for your account. If you choose to use an existing email you need to be aware of the following:

Note - each instance of PropertyIQ must have a unique email address to be used for the administrator and if you have more than one instance of PropertyIQ you will need to nominate a unique email address for each instance your company has.

2. View the portal training videos on the PropertyIQ portal training page
3. Once your portal account is activated, your nominated email address will receive an email advising them of their login details.

Next, you need to configure your company's preferences in PropertyIQ and in the portal:

STEP 1 - IN PROPERTYIQ

1. Confirm or edit the user roles and permissions in PropertyIQ for your own team to be able to administer the portal. [See details here](#)
2. We recommend that you send a custom merge letter with your own branding to your lot owners and committee/council members letting them know their portal invitations are coming soon. [See a suggested letter format here](#)
3. Review and update email address fields on lot owner cards and committee/council member cards
4. We recommend that you enter last settled dates on your lot owner cards wherever possible to restrict access to information prior to their ownership or appointment to the committee
5. In the portal control panel:
 - a. Choose the document categories you want to show on the portal
 - b. Choose the financial report options you want to show on the portal

STEP 2 - IN THE PORTAL

1. Before you register any lot owners or committee/council members for the portal you should configure the pages and information categories you want to show on the portal: [See details here](#)
 - a. General
 - b. Owner
 - c. Committee /Council

This should be done before registering any lot owners and committee/council members for portal.

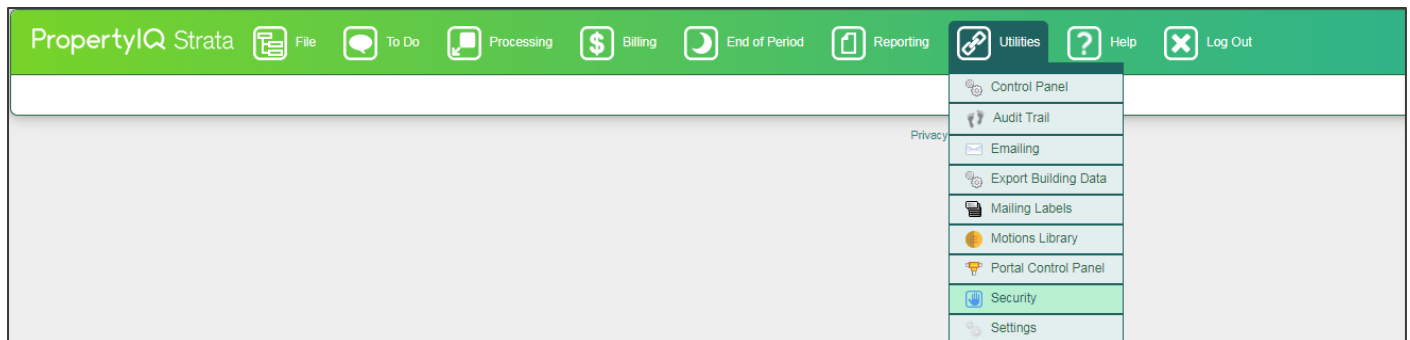
STEP 3 - IN PROPERTYIQ

Register lot owners and committee/council members for portal to trigger a PropertyIQ branded email portal invitation email.

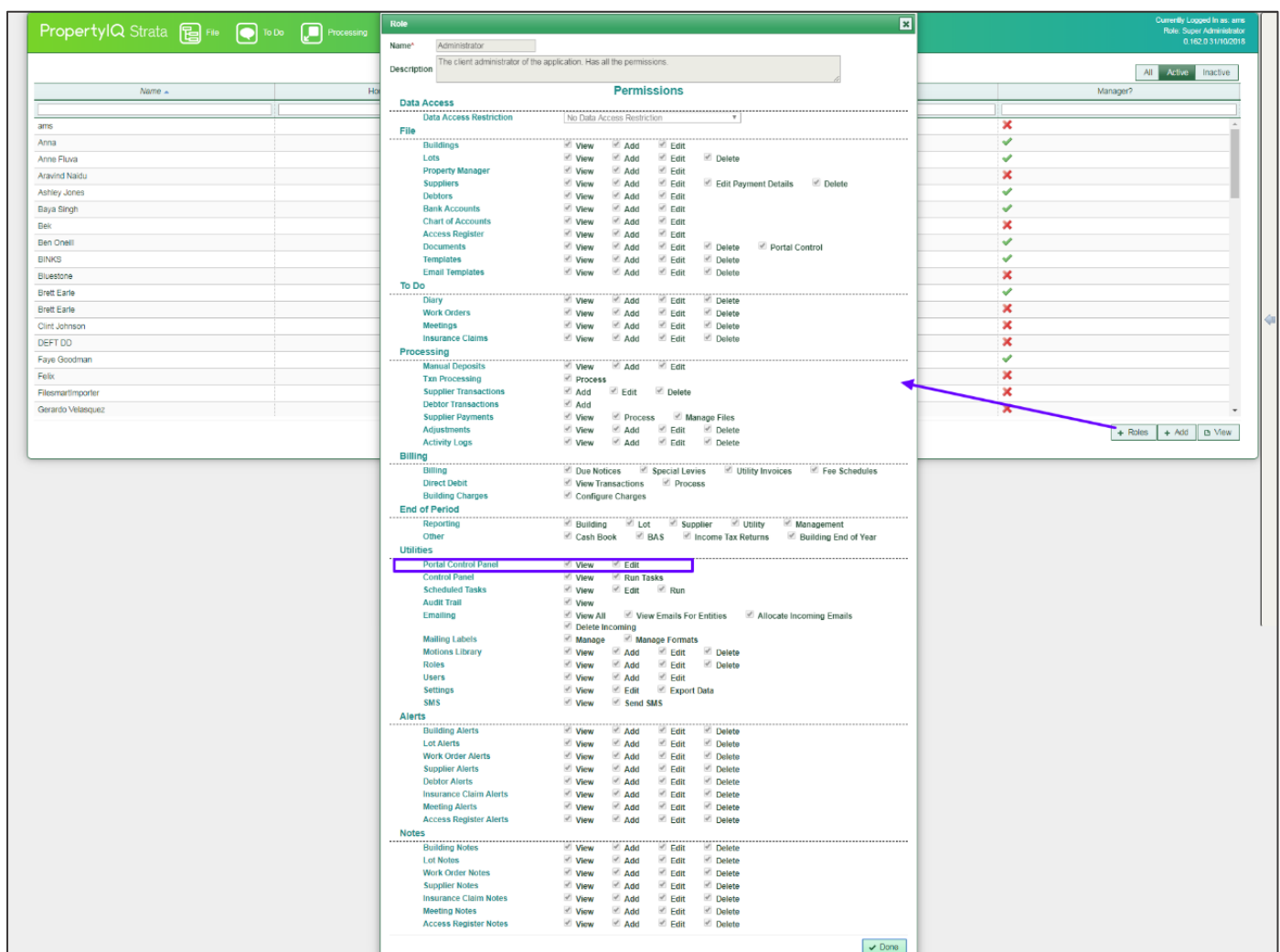
PROPERTYIQ USER PERMISSION REQUIRED TO ADMINISTER PORTAL

Users need to have permission to view and edit the Portal Control Panel. Administrators have this permission by default, but you can edit permissions if you need to.

Go to  and Select *Security*.



The permission required is Portal Control Panel *View* and *Edit*



SENDING A LETTER TO ADVISE LOT OWNERS ABOUT THE PORTAL IN ADVANCE

You may want to send a letter to your lot owners to let them know about the portal prior to sending their portal invitation.

1. The first step is to create a custom merge template. For full instructions, view our Templates manual [here](#).
2. Process a mail merge from the lots/owners screen. For full instructions, view our Lots Owners Screen manual [here](#).
3. [Appendix I](#) at the end of this document has a sample template you might want to use.

PORTAL ADMINISTRATION FUNCTIONS IN PROPERTYIQ

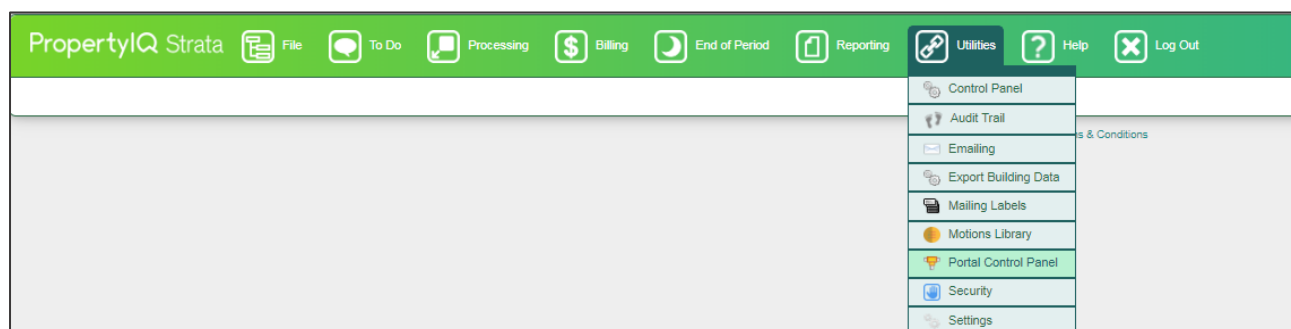
Portal admin functions allow you to determine the information you want users to be able to see in the portal.

PORTAL CONTROL PANEL

The Portal Control Panel allows you to:

- Configure the documents and reports you want to make available to your lot owners and committee/council members
- Register and manage portal accounts for lot owners and council committee members

Access the Portal Control Panel from the Utilities menu



1. Register or de-register Lot owners here. See [Register Lot Owners](#) and [De-Register Lot owners](#) below for full details
2. Register or de-register Committee/council Members here. See [Register Committee/council Members](#) and [De-Register Committee/council Members](#) below for full details
3. *Portal documents* is the default. This allows you to set which document types are available for your lot owners to view on the portal. See [Adding a portal document type](#) below for full details.
4. *Financial reports* allows you to select which financial reports are available for lot owners to request from the portal. See [Financial Reports](#) below for full details.
5. You can set preferences either at a global level or at a folio level if you use folios.
6. You can order the screen by column heading by clicking on any column heading.
7. *+Add* to add a new document type.
8. *View* and edit an item you have highlighted on the screen.

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

Portal Control Panel

1 Register Lot Owners 2 Register Committee Members

3 Portal Documents 4 Financial Reports

Folio: Global Settings 5

6 Document Type	Portal Category	Auto-Publish Owner	Auto-Publish Committee
Access Register Attachment	General	✓	✓
Agency Agreement	Building	✓	✓
By Laws	Building	✓	✗
bylaws	Building	✓	✗
Correspondence	Lot	✓	✗
Due Notice	Lot	✓	✗
Financial	Financial	✓	✓
Meeting Notice	Meetings	✓	✓

7 + Add 8 View

FINANCIAL REPORTS

The financial report settings determine which financial reports lot owners and committee/council members can select when clicking *Request Detailed Financial Report* in the portal. This is an example of the lot owner or committee/council member view from the portal:

Request Detailed Financial Report

☒ Balance Sheet
 ☒ Income and Expenditure Statement

☒ Header Sheet
 ☒ Expenses and Other Income

☒ Key Financial Information
 ☒ Debtor Positions

From: 01/01/2019
 To: 24/06/2019

When the user selects *Request*, the documents they requested are emailed to them directly once the report generation is complete.

FINANCIAL REPORTS – BUILDINGS IN VICTORIA

For buildings located in Victoria **AND** the building has multiple Owners Corporations (OCs), lot owners and committee members will see an additional option on the request screen.

This will only display a list of the OCs in the building that they belong to as a lot owner and/or committee member. For example, if they are a committee member for OC1 and also an owner in OC2 and OC3, then they will see OC1, OC2 and OC3 in the list of options to choose from.

Based on their selection, they will receive a financial report for the selected OC/s only.

Request Detailed Financial Report

Select Options

☐ OC1 ☐ OC3

Select Reports

☐ Balance Sheet ☐ Fund Management
☐ Income and Expenditure Statement ☐ Cash Management
☐ Lot Positions ☐ Key Financial Information
☐ Debtor Positions

Select Dates

From To

SETTING FINANCIAL REPORTS PREFERENCES

Under Utilities > Portal Control Panel screen

1. Select the *Financial Reports* tab
2. *Edit* to change your preferences

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

Currently Logged in as: ama
Role: Super Administrator
0.183.1 2/9/2019

Portal Control Panel

Register Lot Owners Register Committee Members

Portal Documents **Financial Reports**

Folio: Global Settings

Detailed Financial Report
Set the report options used when generating the 'Detailed Financial Reports' for the Portal:

Owner	Committee	Report	Include Last Year Balances
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Balance Sheet	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Income and Expenditure Statement	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Lot Positions	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Fund Management	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Cash Management	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Trust Trial Balance	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Header Sheet	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Expenses & Other Income	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Key Financial Information	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Debtor Positions	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	All	<input type="checkbox"/>

Include Current Budget 12 Months ☐
Group Accounts ☐

Basis: Accrual

Global Report Setting
☐ Consolidated Schedules ☒ Include Manager Name
☒ Split Schedules

1. You can set Financial Reports preferences either at a global or folio level if you use folios
2. Choose which reports you want to make available for lot owner or committee/council member accounts (or both)
3. The selections on the right apply to the corresponding report on the left. I.E. the option to *Include Last Year Balances* applies to the *Balance Sheet* report.
4. If you manage multi-schedule buildings, you can decide whether you want reports to be generated for consolidated or for split schedules
5. Select whether you want the strata manager name to appear on financial reports
6. *Save*

PropertyIQ Strata

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

Currently Logged In as: sms
Role: Super Administrator
0.183.1 2/9/2019

Portal Control Panel

Register Lot Owners Register Committee Members

Portal Documents Financial Reports

Folio: Global Settings (1)

Detailed Financial Report
Set the report options used when generating the 'Detailed Financial Reports' for the Portal:

Owner	Committee		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Balance Sheet (2)	<input type="checkbox"/> Include Last Year Balances (3)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Income and Expenditure Statement	<input checked="" type="checkbox"/> Include Last Year Balances
			<input checked="" type="checkbox"/> Include Current Budget 12 Months
			<input type="checkbox"/> Group Accounts
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Lot Positions	
<input type="checkbox"/>	<input type="checkbox"/>	Fund Management	
<input type="checkbox"/>	<input type="checkbox"/>	Cash Management	<input type="checkbox"/> Group Accounts
<input type="checkbox"/>	<input type="checkbox"/>	Trust Trial Balance	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Header Sheet	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Expenses & Other Income	Basis: Accrual
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Key Financial Information	
<input type="checkbox"/>	<input type="checkbox"/>	Debtor Positions	
<input type="checkbox"/>	<input type="checkbox"/>	All	

Global Report Setting

☐ Consolidated Schedules ☒ Include Manager Name (5)

☒ Split Schedules (4)

Save (6) Cancel

There are two ways you can publish a document to portal for viewing by your lot owners and committee members.

1. Automatic publishing

- Bulk automated upload to portal for a group of documents; viewed by all lot owners and/or all committee members

2. Manual publishing

- Manual upload of a single document; viewed by selected lot owners and/or committee members. You can also select an optional expiry date so the document only appears on portal for a certain period of time.

Documents that you automatically or manually publish will be made available to the owners and/or members on portal when the next overnight sync process is run.

Please see the sections below on [Automatic publishing](#), [Manual publishing](#) and [View a document's portal status](#) for more information.



You can use auto-publishing AND manual publishing at the same time on the same document. For example, you can auto-publish the document to all committee/council members, and then manually publish the document to the owner of Lot 1.

AUTO-PUBLISHING – BULK AUTOMATED UPLOAD TO PORTAL

Your selections determine the document types that will **automatically** appear on the portal. Documents of the types you have marked as *auto publish* will automatically be made available to the owners on the portal when the next overnight sync process is run.

You can also determine whether a document shows in the portal, if the document is dated prior to the lot's last settled date. This is configured from the portal. For full details, see the section [Portal administration functions in the portal](#).

ADDING A PORTAL DOCUMENT TYPE

Under Utilities > Portal Control Panel screen > Portal Documents tab

1. *+Add* to open the portal category box.
2. Select a document type from the dropdown list. The list shows all the document types that your company has set up. You can edit your document types by going to Settings>Application Settings>Document types
3. Select a portal category from the dropdown list. The list shows the available portal document categories. You can't edit these.
4. If *Auto Publish Owner* is ticked, whenever a document of this type is created or uploaded to PropertyIQ, it will automatically publish to lot owner portal accounts in the next overnight sync. If *Auto Publish* is not selected, then documents of this type will *not* appear on the portal. If *Auto Publish Committee* is ticked, whenever a document of this type is created or uploaded to PropertyIQ, it will automatically be synced to committee member portal accounts in the next overnight. If *Auto Publish* is not selected, then documents of this type will not appear on the portal.
5. *Save* the portal category
6. *Cancel* to exit without saving your changes.

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

Currently Logged In as: ams
Role: Super Administrator
0.183.1 2/9/2019

Portal Control Panel

Register Lot Owners Register Committee Members

Portal Documents Financial Reports

Folio: Global Settings

Document Type	Portal Category	Auto-Publish Owner	Auto-Publish Committee
Access Register Attachment	General	✓	✓
Agency Agreement	Building	✓	✓
By Laws	Building	✓	✗
bylaws	Building	✓	✗
Correspondence	Lot	✓	✗
Due Notice	Lot	✓	✗
Financial	Financial	✓	✓
Meeting Notice	Meetings	✓	✓

+ Add View

Portal Category

Document Type* Annual Notice

Portal Category* Lot

Auto-Publish ☒ Owner ☐ Committee

Save Cancel



If you have a document type set to auto publish and then you subsequently *untick* auto publish, documents of that type that were previously sent to the portal will be removed from the portal. You can also delete a document category. View instructions [Deleting a Document Category](#). The ability to remove individual documents from the portal is also available, view instructions to [Remove and Restore a single document](#).

VIEWING AND EDITING DOCUMENT TYPES

1. Highlight the document and then double click on it to open the portal category box *or*
2. Select *View*
3. Select *Edit*

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

Currently Logged In as: ams
Role: Super Administrator
0.183.1 2/9/2019

Portal Control Panel

Register Lot Owners Register Committee Members

Portal Documents Financial Reports

Folio: Global Settings

Document Type	Portal Category	Auto-Publish Owner	Auto-Publish Committee
Access Register Attachment	General	✓	✓
Agency Agreement	Building	✓	✓
By Laws	Building	✓	✗
bylaws	Building	✓	✗
Correspondence	Lot	✓	✗
Due Notice	Lot	✓	✗
Financial	Financial	✓	✓
Meeting Notice	Meetings	✓	✓

+ Add View

Portal Category

Document Type* Access Register Attachment

Portal Category* General

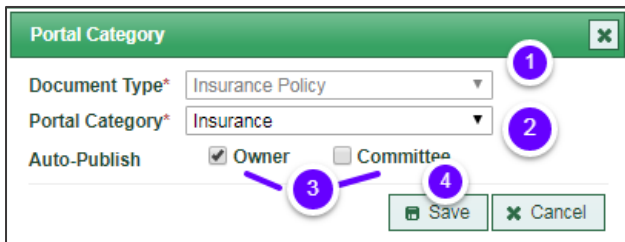
Auto-Publish ☒ Owner ☒ Committee

Edit Done

1. The document type shows on the dropdown list
2. The portal category shows on the dropdown list
3. If *Auto Publish* Owner is selected, whenever a document of this type is created or uploaded to PropertyIQ, it will automatically publish to lot owner portal accounts in the next automatic sync. If *Auto Publish* is not selected, then

documents of this type will not appear on the portal. If *Auto Publish* Committee I is selected, whenever a document of this type is created or uploaded to PropertyIQ, it will automatically publish to lot committee/council accounts in the next automatic sync. If *Auto Publish* is not selected, then documents of this type will not appear on the portal. The ability to manually send individual documents to the portal will be coming in a future release.

4. Save



The following document types do not appear in the portal so are **not available** to select from the document types list:

- Cash Book Report/Statement
- Cash Book month End
- Remittance Advice File
- Tender Request
- Work Order
- Work Order attachment
- Quote request
- Quote attachment
- Quote email attachment



You can choose additional configurations within the portal to determine the information you want to make available to your lot owners and whether you only want to include documents added since the last settled date of the lot or appointment date of a committee/council member. See the section below - [Portal Administration functions in the portal](#)

DELETING A DOCUMENT CATEGORY

You can choose to remove all documents in category from the portal. If you choose this option, all documents that were uploaded to the portal in this category will be deleted.

Step 1

1. Highlight a line item that is included in this category, double click to open the line item *or*
2. Select *View*
3. Select *Edit*

The screenshot shows the PropertyIQ Strata Portal Control Panel. At the top, there is a navigation bar with icons for File, To Do, Processing, Billing, End of Period, Reporting, Utilities, Help, and Log Out. The user is logged in as 'ame' with the role of 'Super Administrator' on 2/9/2019. Below the navigation bar, there are tabs for 'Register Lot Owners' and 'Register Committee Members'. The main content area has two tabs: 'Portal Documents' and 'Financial Reports'. Under 'Portal Documents', there is a dropdown menu for 'Folio' set to 'Global Settings'. Below this is a table with columns: 'Document Type', 'Portal Category', 'Auto-Publish Owner', and 'Auto-Publish Committee'. The table lists various document types and their corresponding categories and auto-publish status. A blue circle '1' is next to the 'Access Register Attachment' row. To the right of the table is a 'Portal Category' dialog box. It has fields for 'Document Type*' (Access Register Attachment), 'Portal Category*' (General), and 'Auto-Publish' (Owner and Committee checkboxes). There are 'Edit' and 'Done' buttons. A blue circle '3' is next to the 'Edit' button. At the bottom of the table, there are '+ Add' and 'View' buttons. A blue circle '2' is next to the 'View' button.

Document Type	Portal Category	Auto-Publish Owner	Auto-Publish Committee
Access Register Attachment	General	✓	✓ 1
Agency Agreement	Building	✓	✓
By Laws	Building	✓	✗
bylaws	Building	✓	✗
Correspondence	Lot	✓	✗
Due Notice	Lot	✓	✗
Financial	Financial	✓	✓
Meeting Notice	Meetings	✓	✓

1. The document type shows here
2. The portal category shows here
3. *Delete* to remove the category and all documents in the portal that were assigned to that category

This is a close-up of the 'Portal Category' dialog box. It shows the 'Document Type*' field with 'Access Register Attachment' and a blue circle '1' next to it. The 'Portal Category*' field has 'General' and a blue circle '2' next to it. The 'Auto-Publish' section has 'Owner' and 'Committee' checkboxes, both checked, with a blue circle '3' next to the 'Committee' checkbox. At the bottom, there are three buttons: 'Delete' (with a trash icon), 'Save' (with a floppy disk icon), and 'Cancel' (with an 'X' icon).

REMOVE AND RESTORE A SINGLE DOCUMENT AUTO-PUBLISHED TO PORTAL

You can now remove a single document from the portal where it's been saved to a document category in PropertyIQ that's been auto-published to portal. If there is only one or two documents in an entire category that you don't want to show in portal, removing them individually avoids unpublishing an entire category of documents from portal, or re-filing a single document to another category that's not auto-published to portal.

Once a document is removed from portal, it can also be restored and re-published if required.

Find a document that's been published to portal. It will have a green tick in the 'On Portal' status column.

1. Click on the green tick in the 'On Portal' column of the document
2. The details of the document will show here, along with the portal status
3. The current auto-publish settings of the document will show here
4. Click here to remove the selected document

The screenshot shows the PropertyIQ Strata Documents interface. A modal window titled 'Publish to Portal' is open, displaying details for a document named 'Financial Report 01-01-2019 to 15-05-2020.pdf'. The document is categorized as 'Financial' and has a green tick in the 'On Portal' status column. The modal also shows auto-publish settings: 'Published to Owners' (Y), 'Published to Committee Members' (Y), and 'Portal Category' (Financial). A 'Remove Document' button is visible in the bottom right of the modal. In the background, a table lists various documents with their dates, names, and 'On Portal' status (indicated by green ticks or red X's). A green circle with the number 1 points to a green tick in the 'On Portal' column of the 'Financial' document row. A green circle with the number 2 points to the document details in the modal. A green circle with the number 3 points to the 'Auto Publish' section in the modal. A green circle with the number 4 points to the 'Remove Document' button in the modal.

You'll receive a notification that the document will be removed on the next portal sync. Click OK to confirm you want to proceed.

This screenshot shows the 'Publish to Portal' modal with a confirmation dialog box overlaid. The dialog box contains a question mark icon and the text: 'You are about to remove this document from the Portal and this will take effect on the next sync. Please confirm if you want to proceed.' There are 'Cancel' and 'OK' buttons at the bottom of the dialog. The modal background is dimmed, showing the same document details as in the previous screenshot.

1. The 'On Portal' status of the document is updated
2. You'll see a new message here to confirm the document is no longer on portal
3. Click here to restore the document to portal

Publish to Portal

Document Details

Document Name	Financial Report 01-01-2019 to 15-05-2020.pdf
Document Type	Financial
Building Name	The Bachelor Pad
S/Plan	1
On Portal Status	✗ 1

Auto Publish

Published to Owners	Y
Published to Committee Members	Y
Portal Category	Financial

This document is not currently auto published to the Portal. To restore auto publishing, select the Restore Document button **2**

Restore Document **3**

Manual Publish

Close

You'll receive a notification that the document will be restored to portal on the next portal sync. Click OK to confirm you want to proceed.

Publish to Portal

Document Details

Document Name	Financial Report 01-01-2019 to 15-05-2020.pdf
Document Type	Financial
Building Name	The Bachelor Pad
S/Plan	1
On Portal Status	✗

Auto Publish

Published to Owners	Y
Published to Committee Members	Y
Portal Category	Financial

This document is not currently auto published to the Portal. To restore auto publishing, select the Restore Document button

Restore Document

Manual Publish

Close

Confirmation Dialog:

? You are about to publish and restore this document to its previous auto publishing settings. This will take effect on the next sync. Please confirm if you want to proceed.

Cancel **OK**

MANUAL PUBLISHING – UPLOAD A SINGLE DOCUMENT

Manual document publishing gives you **control and flexibility** when publishing documents to the portal.

It allows you the ability to publish a single document to portal that can only be viewed by the lot owners and/or committee members you choose. You can also add an **optional expiry date** so the document is only visible for a certain period of time.

You can publish a single document to the portal from the following areas in PropertyIQ using the *+Publish to Portal* button:

- File > Documents screen
- File > Documents > Advanced Search screen
- File > Buildings > Building card > Documents tab
- File > Lots > Lot card > Documents tab

You can manually select which lot and/or committee member accounts you want the document to appear in as well as the portal document category you want the document to appear in. You can also remove a document you've manually published to portal. This can be done from the same screen.

Documents that you manually publish will be made available to the owners and/or members on portal when the next overnight sync process is run.

MANUALLY PUBLISH A DOCUMENT TO PORTAL

You can publish a single document to the portal from the following areas in PropertyIQ using the *+Publish to Portal* button:

- File > Documents screen
- File > Documents > Advanced Search screen
- File > Buildings > Building card > Documents tab
- File > Lots > Lot card > Documents tab

NOTE: The below steps will show you how to publish a document from the File > Documents screen. The same steps can be taken from any of the above screens.

Step 1 – Select the document

Go to File > Documents

1. Select the document you want to publish to the portal
2. Select *Publish to Portal*

The screenshot shows the 'Documents' screen in the PropertyIQ Strata application. The interface includes a top navigation bar with icons for File, To Do, Processing, Billing, End of Period, Reporting, Utilities, Help, and Log Out. The user is logged in as 'ams' (Super Administrator) on 08/04/2020. The main area displays a table of documents with columns: Date, Name, S/Plan, Building Name, Street Name, Lot, Unit, Manager, Supplier, Document Type, and On Portal. A document titled 'Financial Report Final 01-01-2017 to 31-12-2017.pdf' is selected, indicated by a blue circle with the number '1'. At the bottom right, a blue circle with the number '2' highlights the 'Publish to Portal' button in the action bar.

Date	Name	S/Plan	Building Name	Street Name	Lot	Unit	Manager	Supplier	Document Type	On Portal
31/3/2020	Financial Report Final 12-02-2016 to 30-06-2016.pdf	1	The Bachelor	Hollywood Drive			Bella Carstairs		Financial	✓
31/3/2020	End of Year Reports - 2016-2016.pdf	1	The Bachelor	Hollywood Drive			Bella Carstairs		Financial	✗
31/3/2020	Financial Report Final 01-01-2017 to 31-12-2017.pdf	1	The Bachelor	Hollywood Drive			Bella Carstairs		Financial	✗
31/3/2020	End of Year Reports - 2017-2017.pdf	1	The Bachelor	Hollywood Drive			Bella Carstairs		Financial	✗
31/3/2020	Financial Report Final 01-01-2018 to 31-12-2018.pdf	1	The Bachelor	Hollywood Drive			Bella Carstairs		Financial	✗
31/3/2020	Financial Report Final 01-01-2018 to 31-12-2018.pdf	1	The Bachelor	Hollywood Drive			Bella Carstairs		Financial	✗
31/3/2020	End of Year Reports - 2018-2018.pdf	1	The Bachelor	Hollywood Drive			Bella Carstairs		Financial	✗
31/3/2020	Financial Report Final 01-01-2019 to 31-12-2019.pdf	1	The Bachelor	Hollywood Drive			Bella Carstairs		Financial	✗
31/3/2020	End of Year Reports - 2019-2019.pdf	1	The Bachelor	Hollywood Drive			Bella Carstairs		Financial	✗
18/3/2020	Tenancy List Report.pdf								Tenants	✗
18/3/2020	BAS Clearing Journal Summary - (2020-03-01 to 2020-03-18).pdf	23	Camellia Grove	Florence Avenue			Bella Carstairs	My Strata Co	Bas Clearing Jour...	✗
18/3/2020	BAS Clearing Journal Summary - (2020-03-01 to 2020-03-18).pdf	23	Camellia Grove	Florence Avenue			Bella Carstairs	My Strata Co	Bas Clearing Jour...	✗
18/3/2020	BAS Clearing Journal Summary - (2020-03-01 to 2020-03-18).pdf	23	Camellia Grove	Florence Avenue			Bella Carstairs	My Strata Co	Bas Clearing Jour...	✗
18/3/2020	BAS Clearing Journal Summary - (2020-03-01 to 2020-03-18).pdf	23	Camellia Grove	Florence Avenue			Bella Carstairs	My Strata Co	Bas Clearing Jour...	✗
18/3/2020	BAS Clearing Journal Summary - (2020-03-01 to 2020-03-18).pdf	23	Camellia Grove	Florence Avenue			Bella Carstairs	My Strata Co	Bas Clearing Jour...	✗
17/3/2020	BAS Clearing Journal Summary - (2020-01-01 to 2020-03-31).pdf							My Strata Co	Bas Clearing Jour...	✓
17/3/2020	Income Tax Report 01-07-2019 to 30-06-2020.pdf	10	Atrium	Mitre Drive			AMS Mick		Income Tax Report	✗
17/3/2020	Income Tax Report 01-07-2019 to 30-06-2020.pdf	236598	Myer Bowl	Leederville Street			Ashley Jones		Income Tax Report	✗

1. The document details show here
2. If the document isn't already on the portal, a red cross shows here
3. The auto publish status of this document (determined by your auto publish settings in the portal control panel) show here
4. Use the search icon to select the lot owner accounts you want to publish this document to
5. Use the search icon to select the committee member accounts you want to publish this document to

The screenshot shows a 'Publish to Portal' window with the following sections and callouts:

- Document Details:**
 - Document Name: Financial Report Final 01-01-2017 to 31-12-2017.pdf (1)
 - Document Type: Financial
 - Building Name: The Bachelor
 - S/Plan: 1
 - On Portal Status: (2)
- Auto Publish:**
 - Published to Owners: N (3)
 - Published to Committee Members: N
 - Portal Category:
- Manual Publish:**
 - Select Lots (4)
 - Select Committee Members (5)
 - Portal Category*:
 - Expiry Date:
 -

Below the Manual Publish section is a table titled 'Manually published to 0 accounts'.

	S/Plan	Lot	Unit	Name	Type	Published	Published By	Portal Category	Expiry Date
<input type="checkbox"/>									

At the bottom right of the window are buttons for 'Remove' and 'Close'.

Step 2 – Select Lots and/or Committee Members

To publish to Lot Owner/s – select the Lots button

1. Select the lot accounts you want to publish to
NOTE: You'll only see lot owners on this list if they have a portal account
2. Click *Select*

Step 3 – Publish the document

1. Now that you've selected to publish to one or more lot owner/committee member accounts, you'll see the number you've selected here.
2. Select a portal document category from the dropdown list (if enabled)
NOTE: If you have already nominated a Portal Category for the applicable document type in your global portal control panel (under Utilities > Portal Control Panel > Portal Documents), then it will default and be locked to that pre-selected category.
3. You can optionally select an expiry date for the document. If you do, the document will be removed from the portal after that date.
4. Click *Publish*

Document Details

Document Name

Financial Report Final 01-01-2017 to 31-12-2017.pdf

Document Type

Financial

Building Name

The Bachelor

S/Plan

1

On Portal Status

Auto Publish

Published to Owners

N

Published to Committee Members

N

Portal Category

Manual Publish

Select Lots

2 Lot/s selected

Select Committee Members

3 Committee member/s selected

Portal Category*

Financial

Expiry Date

30/06/2020

Publish

Manually published to 0 accounts

	S/Plan	Lot	Unit	Name	Type	Published	Published By	Portal Category	Expiry Date
--	--------	-----	------	------	------	-----------	--------------	-----------------	-------------

Remove

Close

You'll receive a popup message, confirm to proceed.

?

You are about to manually publish this document to the portal. The selected lots and/or committee members will be able to access and view this document on portal from the next sync.

Please confirm if you want to proceed.

Cancel

Confirm

You'll then see the lot and committee accounts the document has been published to listed in the table.

✕

Publish to Portal

Document Details

Document Name

Financial Report 01-01-2019 to 31-12-2019.pdf

Document Type

Financial

Building Name

The Bachelor Pad

S/Plan

1

On Portal Status

✓

Auto Publish

Published to Owners

N

Published to Committee Members

N

Portal Category

Financial

Manual Publish

Select Lots

Select Committee Members

Portal Category*

Financial

Expiry Date

Publish

Manually published to 4 accounts

<input type="checkbox"/>	S/Plan	Lot	Unit	Name	Type	Published	Published By	Portal Category	Expiry Date
<input type="checkbox"/>	1	1	1	Brena Mulligan	Lot	09/10/2020 - 2:29 pm	Nicki Scrivener	Financial	
<input type="checkbox"/>	1	10		Edward McManus	Lot	09/10/2020 - 2:29 pm	Nicki Scrivener	Financial	
<input type="checkbox"/>	1	11	11	Jasmine Houlahan	Lot	09/10/2020 - 2:29 pm	Nicki Scrivener	Financial	30/10/2020
<input type="checkbox"/>	1			Kim Kardashian	Committee	09/10/2020 - 2:27 pm	Nicki Scrivener	Financial	

Remove

✕ Close

REMOVE A MANUALLY PUBLISHED DOCUMENT FROM PORTAL

1. View the auto-publish status of the document here
 - If the document was published to portal automatically, you'll see a **Y** here for the personas it is published for.
 - If it was manually published to the portal, you'll see a **N** here
2. Select the lot/s or committee member/s from the grid that you want to remove the document for.
 - If the document was manually published to portal, you'll see the lot/committee account details here.
 - If it was automatically published, you won't see any account details here.
3. Click *Remove*. The document will be removed for the **selected lots and/or committee members** on the next portal sync.

Publish to Portal

Document Details

Document Name

Financial Report Final 12-02-2016 to 30-06-2016.pdf

Document Type

Financial

Building Name

The Bachelor

S/Plan

1

On Portal Status

Auto Publish

Published to Owners

N

Published to Committee Members

N

Portal Category

Manual Publish

Select Lots

Select Committee Members

Portal Category*

Select a portal category

Expiry Date

Publish

Manually published to 8 accounts

	S/Plan	Lot	Unit	Name	Type	Published	Published By	Portal Category	Expiry Date
<input type="checkbox"/>	1	3	3	Brena Mulligan	Lot	07/04/2020 - 3:07 pm	ams	Building	
<input type="checkbox"/>	1	5	5	Edward McManus	Lot	07/04/2020 - 3:07 pm	ams	Building	
<input type="checkbox"/>	1	8	8	Kanav Gounden	Lot	07/04/2020 - 3:07 pm	ams	Building	
<input type="checkbox"/>	1	10		Edward McManus	Lot	07/04/2020 - 3:07 pm	ams	Building	
<input type="checkbox"/>	1	11	11	Jasmine Houlahan	Lot	07/04/2020 - 3:07 pm	ams	Building	
<input type="checkbox"/>	1	14	14	Edward McManus	Lot	07/04/2020 - 3:07 pm	ams	Building	
<input type="checkbox"/>	1	33	33	Brena Mulligan	Lot	07/04/2020 - 3:07 pm	ams	Building	
<input type="checkbox"/>	1			Kim Kardashian	Committee	07/04/2020 - 3:07 pm	ams	Building	

Remove

Close

VIEW A DOCUMENT'S PORTAL STATUS

You can check whether a document in PropertyIQ is published on portal by using the **'On Portal'** status column that is available in the following areas in PropertyIQ:

- File > Documents screen

Documents									
From Date	12/07/2020	To Date							
<input type="checkbox"/>	Date	Name	S/Plan	Building Name	Street Name	Lot	Unit	Manager	Supplier
<input type="checkbox"/>	25/9/2020	Financial Report 01-01-2019 to 31-12-2019.pdf	1	The Bachelor Pad	Hollywood Drive			Anne Flava	Financial
<input type="checkbox"/>	24/9/2020	Financial Report Final 01-10-2019 to 30-09-2020.pdf	7074	The Baker Building	Baker Street			AMS Mick	Financial
<input type="checkbox"/>	24/9/2020	End of Year Reports - 2019-2020.pdf	7074	The Baker Building	Baker Street			AMS Mick	Financial
<input type="checkbox"/>	24/9/2020	Financial Report Final 24.09.2020 to 23.09.2021.pdf	7074	The Baker Building	Baker Street			AMS Mick	Financial
									On Portal

- File > Documents > Advanced Search screen

Building

Folio

All Folios

Supplier

Document Name

Document Comment

Lot

Manager

All Managers

Uploaded/Created By

All Users

Document Type

All Types

Created (from) ?

12/09/2020

Created (to) ?

12/10/2020

Last Emailed (from) ?

Last Emailed (to) ?

Last Printed (from) ?

Last Printed (to) ?

Search Entire Database ?

☒

Search

<input type="checkbox"/>	Name	S/Plan	Lot	Supplier	Manager	Folio	Type	Comments	Date	Dates	On Portal
<input type="checkbox"/>	A Pest Inspection advice - 2020-10-12 ...	6969	2		AMS Mick		Published D...			Created: 12/10/2020 Emailed: 12/10/2020	<input checked="" type="checkbox"/>
<input type="checkbox"/>	A Pest Inspection advice - 2020-10-12 ...	6969	1		AMS Mick		Published D...			Created: 12/10/2020 Emailed: 12/10/2020	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Insurance Claim form - JointOwner.pdf	6969	6		AMS Mick		Insurance C...	Generated by Insurance Claim Notice ...	12/10/2020	Created: 12/10/2020 Emailed: 12/10/2020	<input type="checkbox"/>

- File > Buildings > Building card > Documents tab

Settings	Dates	Charges	Info	Financials	Budget	Notes	Documents	Registers	Alerts	Work Orders	Insurance Claims	Emails	Log of Changes
From		To		Filter: All									
<input type="checkbox"/>	Created Time	Date	User	Name	Type	Details	On Portal						
<input type="checkbox"/>	25/09/2020 - 9:03 am	25/9/2020	Jack Dobinson	Financial Report 01-01-2019 to 31-12-2019.pdf	Financial	Generated by Building Financial Reports							
<input type="checkbox"/>	14/09/2020 - 12:40 pm	14/9/2020	Nick Dorcas	Income Tax Report 01-07-2019 to 30-06-2020.pdf	Income Tax Report	System Generated by Tax Returns							
<input type="checkbox"/>	14/09/2020 - 10:49 am		Nick Dorcas	Quarterly BAS Report - 2020-04-01 to 2020-06...	BAS Report	Basis: Accrual From: 01/04/2020 To: 30/06/2020							

- File > Lots > Lot card > Documents tab

Contact	Info	Delivery	Settings	Ledger	Notes	Documents	Alerts	Emails	Log of Changes
From		To		Filter: All					
<input type="checkbox"/>	Created Time	Date	User	Name	Type	Details	On Portal		
<input type="checkbox"/>	07/08/2020 - 2:08 pm		Caroline Fong 1	Lot 1 - Special Notice to 31-08-2020.pdf	Levy Notice	Posted to: 1 test mailing address TEST SUBURB NSW 2773	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	07/08/2020 - 2:06 pm		Caroline Fong 1	Lot 1 - Special Notice to 31-08-2020.pdf	Levy Notice	Emailed to: ruth.smyth@macquarie.com on: 07/08/20...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	26/07/2020 - 3:00 pm		Ruth	Cover letter - 2020-07-26.pdf	Published Document	Emailed on: 26/07/2020 03:00 pm	<input checked="" type="checkbox"/>		

- Click on the tick or cross icon that is displayed in the *On Portal* column
- General document details will display here
- Auto-publish** status of the document will show here
- Manual publish** status of the document will show here. If the document has been manually published to any lots or committee members, their details will show in the table.

PropertyIQ Strata

From Date

12/07/2020

To Date

Date

▼

Name

29/9/2020

Insurance Claim form - Owner.pdf

29/9/2020

Insurance Claim form - Contact.pdf

29/9/2020

Insurance Claim form - User.pdf

29/9/2020

Insurance Claim form - Supplier.pdf

25/9/2020

Financial Report 01-01-2019 to 31-12-2019.pdf

24/9/2020

Financial Report Final 01-10-2019

24/9/2020

End of Year Reports - 2019-2020

24/9/2020

Financial Report Final 24-09-2020

23/9/2020

Tenancy List Report.pdf

22/9/2020

Financial Report 01-07-2019 to 31-06-2020

22/9/2020

Opening Balances 01-09-2020.pdf

22/9/2020

Financial Report Final 01-07-2020

21/9/2020

Financial Report 31-07-2020 to 30-06-2021

21/9/2020

Financial Report Final 01-07-2020

21/9/2020

100 Rainford Pde SYDNEY Proposed

21/9/2020

100 Rainford Pde SYDNEY Approved

21/9/2020

100 Rainford Pde SYDNEY Accepted

21/9/2020

100 Surry St SYDNEY Proposed

Publish to Portal

Document Details

Document Name

Financial Report 01-01-2019 to 31-12-2019.pdf

Document Type

Financial

Building Name

The Bachelor Pad

S/Plan

1

On Portal Status

✓

Auto Publish

Published to Owners

N

Published to Committee Members

N

Portal Category

Financial

Manual Publish

Select Lots

Select Committee Members

Portal Category*

Financial

Expiry Date

Publish

Manually published to 4 accounts

	S/Plan	Lot	Unit	Name	Type	Published	Published By	Portal Category	Expiry Date
<input type="checkbox"/>	1	1	1	Brena Mulligan	Lot	09/10/2020 - 2:29 pm	Nicki Scrivener	Financial	
<input type="checkbox"/>	1	10		Edward McManus	Lot	09/10/2020 - 2:29 pm	Nicki Scrivener	Financial	
<input type="checkbox"/>	1	11	11	Jasmine Houlahan	Lot	09/10/2020 - 2:29 pm	Nicki Scrivener	Financial	30/10/2020
<input type="checkbox"/>	1			Kim Kardashian	Committee	09/10/2020 - 2:27 pm	Nicki Scrivener	Financial	

Remove

Close

Currently Logged In as: Nicki Scrivener
Role: Administrator
0 298.1 6/10/2020

Advanced Search

+ Document Entry

Document Type

On Portal

Insurance Claim

✗

Insurance Claim

✗

Insurance Claim

✗

Insurance Claim

✗

Financial

✓

Financial

✗

Financial

✗

Financial

✗

Tenants

✗

Financial

✗

Financial

✗

Financial

✗

Financial

✗

Financial

✗

Budget Report

✗

Budget Report

✗

Budget Report

✗

Budget Report

✗

Metadata

View

Edit

Delete

PORTAL ADMINISTRATION FUNCTIONS IN PORTAL

Each company has a single administration portal. You will need to nominate a portal administrator in your company. Their email address is used when you log in to the portal.

INITIAL ACCOUNT SETUP FOR PORTAL ADMINISTRATOR

When your portal account is activated by PropertyIQ, the companies nominated Portal Administrator receives an email that looks the same as the invitation a lot owner receives, however the portal administration has special permissions to configure your company-wide (global) and folio preferences.

The portal administrator should **click on the link in the email** to set up their administrator access. This is a one-off process – once the administrator's account is set up, they will access to update the portal using their credentials.

LOGIN AS PORTAL ADMINISTRATOR

To login, go to <https://portal.propertyiq.com.au/login>

1. Select the dropdown to choose your portal user type
2. **Select *Strata Manager***
3. Enter your email address
NOTE: This should be the portal administrator email address that was registered when your company portal account was first setup by PropertyIQ. It's the email address that received the portal invite.
4. Enter your password
5. Click *Login* to proceed
6. Click here if you've forgotten your password. This will re-direct you to a different screen to reset your password.

The screenshot shows the PropertyIQ login interface. At the top is the PropertyIQ logo. Below it is a white login card with a green home icon. The card contains a dropdown menu (1) currently showing 'Owner / Committee Member'. A red box highlights this dropdown, and a callout shows the expanded menu with 'Strata Manager' (2) selected. Below the dropdown are input fields for 'Email*' (3) and 'Password*' (4). A green 'Log in' button (5) is below these fields. At the bottom of the card is a link for 'Forgot password?' (6). At the very bottom of the card are links for 'Terms & Conditions' and 'Privacy Policy', and a copyright notice '© PropertyIQ Pty Limited'.

COMPANY INFO

1. The default is a global view (across your company) but if you use folios you can select a folio from the dropdown list
2. The company and folio information displayed here comes from PropertyIQ. Any changes need to be made in your PropertyIQ company details page. Any changes will update when PropertyIQ is synced with the portal.
3. The last sync time and date show here
4. Main contacts show in the portal and can be added here. You might use them to show the accounts contact, the maintenance contact etc. Enter the details for the main contact and then click *Add*. The main contacts section is additional to the strata manager details section, which shows in the portal if you have ticked to show strata manager details
5. The names and details of any existing main contacts show here.



The first time you login to the portal, automated syncs will not have been processed so your company information will not be fully populated. The first sync may take longer than subsequent syncs as it needs to process all your PropertyIQ data.

PropertyIQ

Faye Goodman

Company Info

Company Info

Global

Information

Company Name: My Strata Co Brisbane

ABN: 72 608 194 707

Address: Level 15, 111 Eagle Street

Suburb: BRISBANE

State: QLD

Postal Code: 4000

Phone: 07 3737 3102

Fax: 07 3910 1190

Email: fayeg@propertyiq.com.au

Principal: Bella Carstairs

Main Contacts

Last sync: 02/12/2019 01:47 PM

Add

Accounts - Bella Carstairs

repairs - Ann Goames

MAIN CONTACTS

The *Main Contacts* section allows you to enter additional contacts that will appear on the building page of the portal for lot owners and committee/council members. For example, you may have a specific repairs and maintenance contact. If you don't enter any main contacts in this section, the main contacts section does not show at all for lot owner or committee/council member portal accounts.

If you use folios, you have the following choices:

- Enter global contacts *only*. These will be seen by lot owner and committee accounts across all folios
- Enter folio contacts. The main contacts for each folio will be seen by lot owner and committee accounts for properties attached to that folio.

Note: you can't have *both* general and folio contacts appearing on your lot owner and committee accounts.



Changes made to main contacts will be immediately updated in the portal. They do not require an overnight sync to take effect.

Portal users can view your Main Contacts.

The screenshot shows the PropertyIQ portal interface for a property named 'Southern Cross'. The interface is divided into several sections:

- Header:** PropertyIQ logo, last updated 23/07/2019 02:37 PM, and user profile Charlie Alexander.
- Property Information:** A section containing details about the property:
 - Strata Plan: 777
 - Address: 7 Livingstone Road SPRING HILL QLD 4000
 - Type: Residential
 - ABN: [redacted]
 - GST Registered: Yes
 - Number of Lots: 5
 - Financial year start: 01/07/2017
 - Levy frequency: Quarterly
- Insurance:** A section showing the insurer as CGU Insurance.
- My Lots:** A section showing the selected lot as LOT # 2.
- Main Contacts:** A section highlighted with a purple border, containing a list of contacts:
 - Main Contacts My Strata Co:** A dropdown menu.
 - Anne:** Phone: 101010011, Email: anne@mystrataco.com.au
 - Anne Eliseo:** Phone: 754546290, Email: info@mystratacoqld.com.au
 - General Account:** Phone: 432862484
- Onsite Manager:** A section showing Phillippe Bandera.
- Caretaker:** A section showing Harrison Shelby.
- Committee Members:** A section showing a list of committee members.

EDIT OR REMOVE A MAIN CONTACT

1. From the *Company Info* page, click on the arrow next to the main contact or (double click anywhere in the box)

The screenshot shows the 'Company Info' page in the PropertyIQ portal. The left sidebar contains links for 'Company Info', 'Configuration', 'Buildings', 'Users', and 'History'. The main content area is titled 'Company Info' and includes a 'Global' dropdown and a 'Last sync' timestamp. The 'Information' section contains fields for Company Name, ABN, Address, Suburb, State, Postal Code, Phone, Fax, Email, and Principal. The 'Main Contacts' section has input fields for Name, Phone, and Email, an 'Add' button, and a list of existing contacts: 'Accounts - Bella Carstairs' and 'repairs - Ann Goames', each with a left-pointing arrow icon.

1. Select *Remove* if you want to remove the main contact from the portal altogether
2. *Edit* to alter the main contact details

This screenshot shows the 'Main Contacts' section of the 'Company Info' page. The 'Accounts - Bella Carstairs' contact is shown with a left-pointing arrow. The 'repairs - Ann Goames' contact is expanded, showing the phone number '131212' and email 'ann@mystrataco.com'. Below this contact are two buttons: 'Remove' (marked with a blue circle containing the number 1) and 'Edit' (marked with a blue circle containing the number 2).

1. Edit the main contact details
2. *Cancel* or
3. *Save*

PropertyIQ

Faye Goodn

Company Info

Configuration

Buildings

Users

History

Information

Company Name

My Strata Co Brisbane

ABN

72 608 194 707

Address

Level 15,

111 Eagle Street

Suburb

BRISBANE

State

QLD

Postal Code

4000

Phone

07 3737 3102

Fax

07 3910 1190

Email

fayeg@propertyiq.com.au

Principal

Bella Carstairs

Main Contacts

Name

Phone

Email

Add

Accounts - Bella Carstairs

Repairs - Ann Goames

131212

ann@mystrataco.com

Cancel

Save

CONFIGURATION

GENERAL CONFIGURATION

General configuration items affect all owner portal accounts associated with your company.

1. Select *General*
2. You can enter a penalty interest disclaimer here. Select to show the disclaimer on the owner's portal view, which will appear on the Levies page for buildings that charge penalty interest.
3. Select to send a copy of all portal registration emails to your strata company email (recorded in PropertyIQ in Utilities>Settings>Company Details>Email)
4. *Save*

The screenshot shows the PropertyIQ Configuration page with the 'General' tab selected. The left sidebar contains links for Company Info, Configuration, Buildings, Users, and History. The main content area has three tabs: General, Owner, and Committee. Under the General tab, there are three numbered items: 1. A checked checkbox for 'Show penalty interest disclaimer on Levies page'. Below it is a text field for the disclaimer, containing the text 'Interest is calculated on a daily basis so there may be differences in the actual amount owed'. 2. A checked checkbox for 'Send copy of all portal registration emails to strata company email'. 3. A 'Save' button in the top right corner. The user's name 'Faye Goodman' is visible in the top right header.



Changes made to general configuration will be immediately updated in the portal. They do not require an overnight sync to take effect.

OWNER CONFIGURATION

Owner configuration allows you to choose which items are displayed on a lot owner's portal view.

1. Select *Owner*.
2. The default is a global view (across your company) but if you use folios you can choose different configurations for different folios. If you enable configuration at a folio level, the folio settings will be used. Currently, once you enable folio configuration you can't revert back to global configuration.
3. Select the information you want to show on the building page
4. Select the information you want to show on the financial page
5. Select the information you want to show on the levies page
6. Select the information you want to show on the meetings page
7. Select the information you want to show on the documents page. You can select whether you want lot owners to only see documents dated after the last settled date of the lot.
8. *Save*.

PropertyIQ
Faye Goodman

Company Info
Configuration
Buildings
Users
History

Configuration
General
Owner
Committee
Save

Global

Building page
Property Info
Insurance
Broker
My Lots
Strata Manager Contact Info
Onsite Manager Contact Info
Caretaker Contact Info
Committee/Council Members

Financial page
Balances
Detailed Financial Reports
Bank Balances Graph
Year on Year Performance Graph

Levies page
Arrears Balance
Next Levy Due balance
Download Statement
Pay with DEFT

Meetings page
Upcoming Meetings
Download Agenda
Previous Meetings
Download Minutes

Document page
Building category
Show documents from lot's last settled date only
Lot category
Show documents from lot's last settled date only
Financial category
Show documents from lot's last settled date only
Meetings category
Show documents from lot's last settled date only
Insurance category
Show documents from lot's last settled date only
General category
Show documents from lot's last settled date only

Changes made to owner configuration will be immediately updated in the portal. They do not require an overnight sync to take effect.

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COMMITTEE/COUNCIL CONFIGURATION

Committee configuration allows you to determine which types of information you want committee/council members to be able to view.

1. Select *Committee*
2. The default is a global view (across your company) but if you use folios you can choose different configurations for different folios. If you enable configuration at a folio level, the folio settings will be used. Currently, once you enable folio configuration you can't revert back to global configuration.
3. Select the information you want committee members to see on the building page
4. Select the information you want committee members to see on the financial page
5. Select the information you want committee members to see on the meetings page
6. Select the information you want committee members to see on the document page. You can select here if you want committee members to only have access to documents dated after they were appointed
7. *Save*

The screenshot shows the PropertyIQ Configuration page for Committee/Council Members. The page has a green header with the PropertyIQ logo and a user profile for Faye Goodman. On the left is a sidebar with navigation links: Company Info, Configuration (selected), Buildings, Users, and History. The main content area is titled 'Configuration' and has three tabs: General, Owner, and Committee (selected). A 'Global' dropdown menu is at the top of the configuration area. There are four numbered callouts: 1 points to the 'Committee' tab, 2 points to the 'Global' dropdown, 3 points to the 'Broker' checkbox under the 'Building page' section, and 4 points to the 'Detailed Financial Reports' checkbox under the 'Financial page' section. The configuration is divided into four sections, each with a title and a list of checkboxes: 'Building page' (Property Info, Insurance, Broker, Strata Manager Contact Info, Onsite Manager Contact Info, Caretaker Contact Info, Committee/Council Members), 'Financial page' (Balances, Detailed Financial Reports, Annual Financial Reports, Bank Balances Graph, Year on Year Performance Graph), 'Meetings page' (Upcoming Meetings, Download Agenda, Previous Meetings, Download Minutes), and 'Document page' (Building category, Show documents from member's appointment date, Financial category, Show documents from member's appointment date, Meetings category, Show documents from member's appointment date, Insurance category, Show documents from member's appointment date, General category, Show documents from member's appointment date). A 'Save' button is in the top right corner.



Changes made to committee configuration will be immediately updated in the portal. They do not require an overnight sync to take effect.

BUILDINGS

1. The default is to show all folios. If you use folios, you can filter by folio
2. Use the search function to refine the screen – enter some key letters and click on the search icon
3. Use the advanced search function for more search options
4. *Export* to export building data to an excel spreadsheet
5. Portal users attached to this building show here.

PropertyIQ

Faye Goodman

Buildings

Export

Folio: All

Search

Advanced Search

SPlan/CTS/OC	Building Name	Address	Suburb	State	PCode	Lots	Folio	Manager Info
1005	Cranley Shores	543 Remington Road 30	MAWSON LAKES	SA	6100	1	Global	Anne Fluva
1008	Jordan Mews	1 Jordan Boulevard	FLEMINGTON	VIC	3125	5	Global	Anne Fluva
101	Cosmo Garden	675 Cosmo Road	SYDNEY	NSW	2077	3	James Folio	James Carl Tolentino
10101	Domain Suites	435 Falcon Street	NORTH SYDNEY	NSW	2019	3	NSW BRANCH	Bella Carstairs
101010	The Goods	Good	SYDNEY	NSW	2000	1	Global	Anne Fluva
1012	Wembley Gardens	39 Cambridge Street	WEMBLEY	WA	6014	4	Global	Bella Carstairs
1015456	Altona	1 Anderson Street	CARLTON	VIC	3000	26	Global	Lea Mac
102	Cosmo Garden 2	676 Cosmo Road	SYDNEY	NSW	2077	4	Global	James Carl Tolentino
10453	The Tempo	13 Mitroian Drive	CROYDON	VIC	3100	9	NSW BRANCH	Training Manager
112233	Fernlee House	1 Fernlee Parade	BURNSIDE	SA	5066	1	SA Folio	Adrian Bolton

ADVANCED SEARCH FUNCTION

1. All folios show by default. If you use folios, you can select to search for a single folio
2. You can use the basic search function by entering some key letters into the box and selecting the search icon
3. Enter search criteria into any of the fields
4. Clear if you want to clear the criteria you have already entered
5. *Search*

PropertyIQ

Faye Goodman

Buildings

Export

Folio: All

Search

Advanced Search

Advanced Search

SPlan/CTS/OC

Building Name

Building Address

Suburb

State

Post Code

Lot Count

Manager


Clear

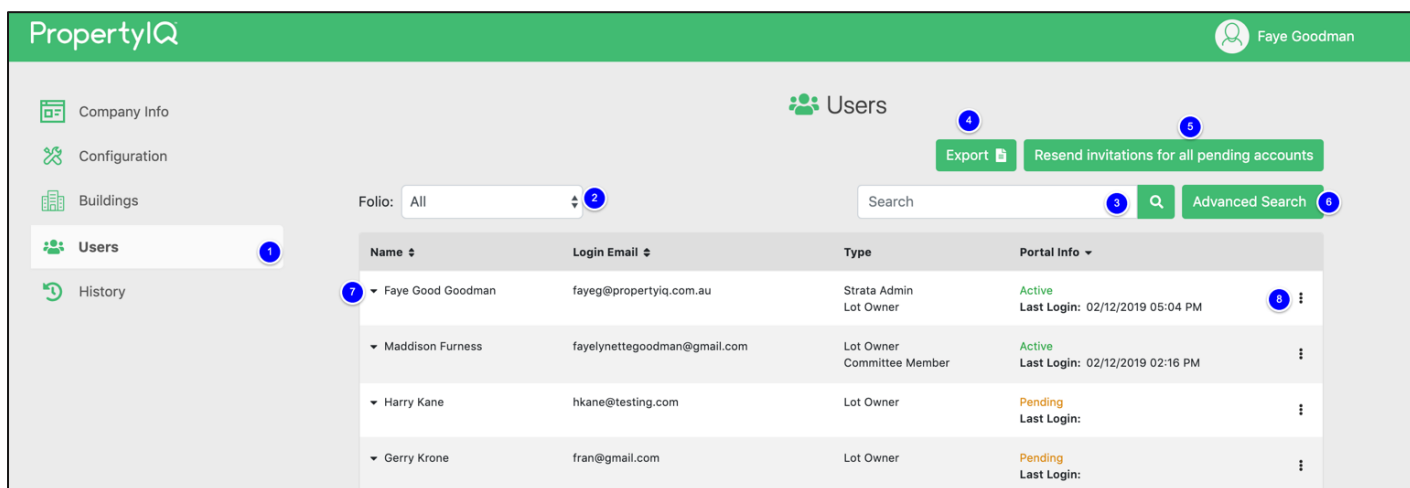
Search

SPlan/CTS/OC	Building Name	Address	Suburb	State	PCode	Lots	Folio	Manager Info	Portal Info
--------------	---------------	---------	--------	-------	-------	------	-------	--------------	-------------

USERS


The *Users* area allows you to view and administer your lot owner and committee/council member user accounts.

1. Select *Users*
2. If you use folios, you can filter by folio.
3. Use the search option to filter the screen.
4. *Export* to export user data to an excel spreadsheet.
5. Select here to resend invitations to all pending user accounts. This resends an invitation to users that you have previously registered in PropertyIQ, who have not yet logged in and activated their portal account.
6. Use the advanced search option for more search functions
7. The details screen shows the owner name, email, whether they are a lot owner or committee /council member (or both)
8. Click  to trigger a forgot password email, or login as this user



Name	Login Email	Type	Portal Info
Faye Good Goodman	fayeg@propertyiq.com.au	Strata Admin Lot Owner	Active Last Login: 02/12/2019 05:04 PM
Maddison Furness	fayelynettegoodman@gmail.com	Lot Owner Committee Member	Active Last Login: 02/12/2019 02:16 PM
Harry Kane	hkane@testing.com	Lot Owner	Pending Last Login:
Gerry Krone	fran@gmail.com	Lot Owner	Pending Last Login:

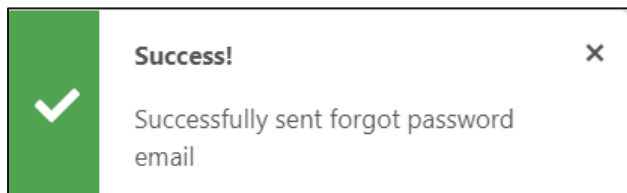
SINGLE USER OPTIONS

You will see these options when you click 

Send forgot password email
Login as user

Send forgot password email

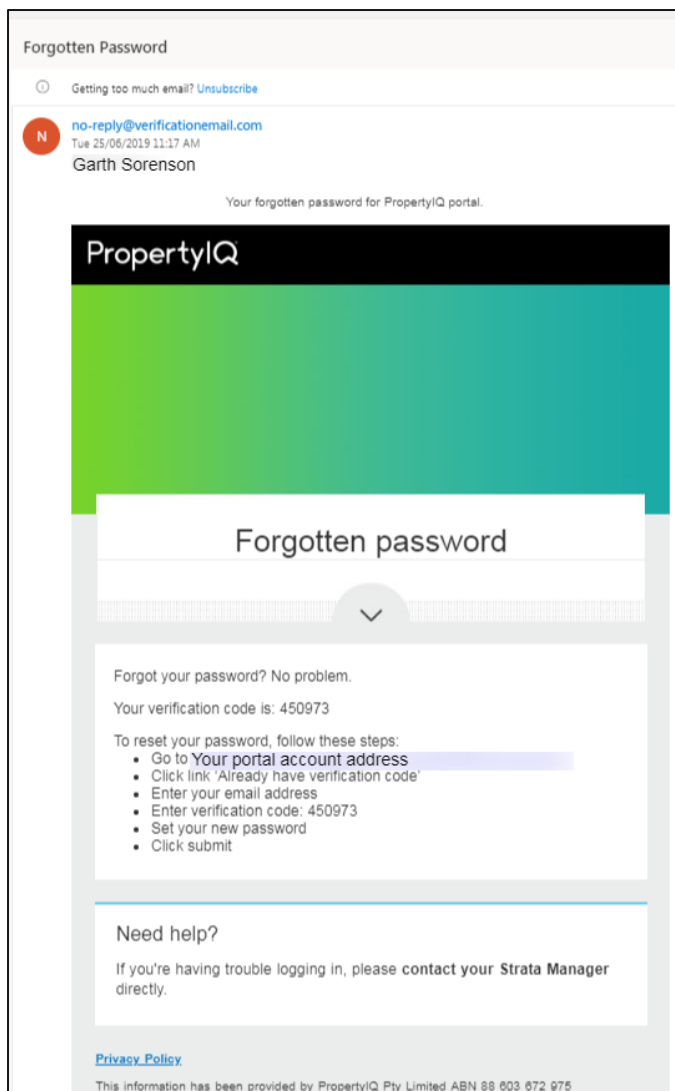
When you select this option, you will see this popup confirming the password re-set email has been re-sent.



Success!

✓ Successfully sent forgot password email

The lot owner or committee member receives an email that looks something like this. They can follow the instructions to re-set their password.



Login as user

Select *Login as user* to view the portal from the user's perspective. This is useful if you need to assist a lot owner with a question or just want to monitor the information your users are able to view.

IMPORTANT NOTE: *This provides read only access. You will only be able to view the users account.*

HISTORY PAGE – SYNC HISTORY

The history screen page a history of all syncs

1. You can search for syncs within a date range by entering dates in the *From* and *To* boxes
2. *Export* the history of all syncs here to an excel spreadsheet
3. You can refine your view by coverage. The choices are:
 - All
 - Strata (all the buildings in your company)
 - Building (single building in your company)
 - User (a single user in your company)
4. You can refine your view by sync type. The choices are:
 - Manual –(the ability to sync manually is coming in a future release)
 - Automatic
5. The End Date/time is the completion time of the sync
6. The Sync Coverage shows here - whether All, Strata, Building or User
7. The Sync Type shows here - whether manual (the ability to sync manually is coming in a future release) or automatic
8. The sync status shows here - whether completed or failed

End Date / Time	Sync Coverage	Sync Type	Sync Status
25/09/2019 08:10 PM	Strata Sync My Strata Co Brisbane	Automatic	Completed
12/09/2019 10:40 AM	Strata Sync My Strata Co Brisbane	Automatic	Completed
11/09/2019 10:40 AM	Strata Sync My Strata Co Brisbane	Automatic	Completed
10/09/2019 10:41 AM	Strata Sync My Strata Co Brisbane	Automatic	Completed
09/09/2019 10:42 AM	Strata Sync My Strata Co Brisbane	Automatic	Completed

HISTORY PAGE – AUDIT TRAIL

1. From the history screen, select *Audit Trail*
2. Select a *From* and *To* date
3. *Export*
4. To search by user, enter some key letters in the box and click on the search icon
5. To search by details, enter some key letters in the box and click on the search icon
6. The date and time of the activity shows in this column
7. The username and email details show in this column
8. The request details show here. Click on the Details to open a box showing further details

PropertyIQ
Yuen Yalung

Company Info
Configuration
Buildings
Users
History

History

Export

From
To

User
Details

Sync History
Audit Trail

Date / Time	User	Details
14/10/2019 03:43 PM	Billy Bryle Bulacso bylly@gmail.com.au	Detailed Financial Report (REQUESTED)
11/10/2019 11:07 PM	Caroline Fong caroline@gmail.com.au	Detailed Financial Report (REQUESTED)
11/10/2019 10:53 PM	Caroline Fong caroline@gmail.com.au	Contact Us (REQUESTED)
11/10/2019 10:53 PM	Caroline Fong caroline@gmail.com.a	Contact Us (REQUESTED)
11/10/2019 10:03 PM	Owner Committee caroline@gmail.com.au	Detailed Financial Report (REQUESTED)

Clicking on an item opens a detailed view

01/10/2019 11:39 AM	Billy SVP billy.bulacso+svp@tooltwist.com My Strata Co Dev 1 Veeps	Detailed Financial Report (REQUESTED)
Field	From	To
taskId		21711
status	started	complete
lastCheckedDate		2019-10-01T03:39:22.631
fileName		Financial Report 18-08-2017 to 01-10-2019.pdf
splan		137
buildingName		Darnley
buildingAddress		79 O'Sullivan Road ROSE BAY NSW 2029
reports		balanceSheet

WHAT APPEARS IN THE AUDIT TRAIL

The following information is recorded and shown under History page > Audit Trail tab:

- Logins by portal users (strata administrators, lot owners and committee/council members)
- Logouts by portal users (strata administrators, lot owners and committee/council members)
- All changes in Strata Administrator account
 - Company Info page – changes to company details
 - Company Info > Main Contacts – add, edit, delete of contacts
 - Configuration page – General, Owner and Committee settings
 - Users page – send forgot password email to user, resend pending invites to user/s
 - Administration page – changes to admin users and roles (created or edited)
- Certain user actions in PropertyIQ Portal
 - 'Contact Strata Manager' enquiries sent (2x audit entries per enquiry; 1 for email sent to the Strata Manager, 1 for copy sent to user)
 - Financial Report requests – financial reports successfully emailed to users
 - Password resets completed by users

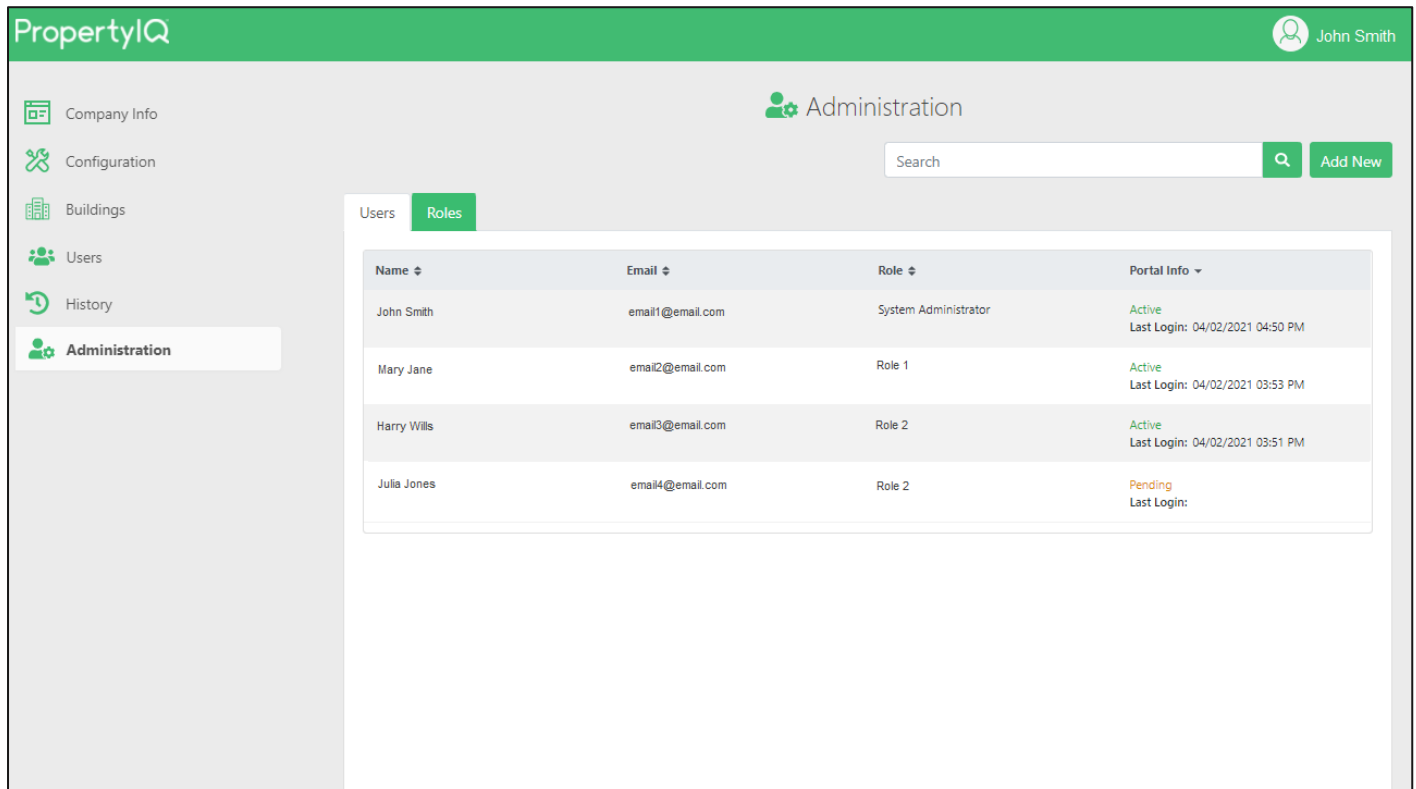
ADMINISTRATION

The *Administration* area allows you to create and manage portal administrators and create and manage roles/permissions for portal administrators. Only one main portal administrator is created as part of your portal account setup. This person can then create additional admin users as required under the *Administration* page.

The Administration page contains:

- [Users tab](#) – view, search, create and edit admin users
- [Roles tab](#) – view, create and edit roles/permissions for admin users

Any changes made to users and roles will be recorded in the portal audit trail under the *History > Audit Trail* page. [See example below](#). Please refer to the below sections for more information.



The screenshot shows the PropertyIQ Administration interface. The top navigation bar is green with the PropertyIQ logo and a user profile for John Smith. The left sidebar contains a menu with icons and labels: Company Info, Configuration, Buildings, Users, History, and Administration (highlighted). The main content area is titled 'Administration' and features a search bar and an 'Add New' button. Below this, there are two tabs: 'Users' and 'Roles'. The 'Users' tab is active, displaying a table of users.

Name	Email	Role	Portal Info
John Smith	email1@email.com	System Administrator	Active Last Login: 04/02/2021 04:50 PM
Mary Jane	email2@email.com	Role 1	Active Last Login: 04/02/2021 03:53 PM
Harry Wills	email3@email.com	Role 2	Active Last Login: 04/02/2021 03:51 PM
Julia Jones	email4@email.com	Role 2	Pending Last Login:

USERS

The *Users* screen allows you to create additional admin users. At the first login to your portal account, the only user visible in the list will be that of the initial portal admin.

- *Rules when creating and editing users:*
 - Mandatory fields are email address, first name, last name and role.
 - Email address must be unique e.g. cannot be used for another portal user (*owner, committee or administrator*).
 - You cannot change any details under your own user, including the role.
 - You cannot edit an email address for an active user.
 - You can edit an email address for a pending user.

View users

1. On the Administration page, click on *Users* tab
2. Search for a user using the search bar here. When performing a search, it will filter the details shown in the table below based on name, email and role
3. The name of the user will show here
4. The email address of the user will show here. This is the email used to login to the portal.
5. The user's assigned role will show here
6. The status and last login details of the user will show here. Available statuses:
 - a. **Active** - a user who has successfully created and logged into their portal account.
 - b. **Pending** - a portal invitation email has been sent. The user has not yet created their portal account.

Name	Email	Role	Portal Info
John Smith	email1@email.com	System Administrator	Active Last Login: 04/02/2021 04:50 PM
Mary Jane	email2@email.com	Role 1	Active Last Login: 04/02/2021 03:53 PM
Harry Wills	email3@email.com	Role 2	Active Last Login: 04/02/2021 03:51 PM
Julia Jones	email4@email.com	Role 2	Pending Last Login:

Create users

1. On the Administration page > Users tab, click the *Add New* button in the top right corner.
2. Enter the email address of the user, which will be used to login to the portal. This is a mandatory field.
*NOTE: The email must be **unique** e.g. cannot be used for another portal user (owner, committee or administrator).*
3. Enter the name of the user. The first and last name are mandatory fields.
4. Select the role of the user using the dropdown options. The list of options will be the same as the roles available in the *Roles* tab.
NOTE: To create a new user, they must firstly have a role assigned.
5. Enter any other optional details for the user, including phone and address.

PropertyIQ Administration

1 Add New

2 Email*

3 Name*

4 Role*

5 Address

Cancel Create

6. Read and acknowledge the privacy statement.
7. Click *Cancel* to return to the main screen. The user will not be created.
8. Click *Create* button to proceed and create the new user.

★ A portal invitation email will then be sent to the new user. They can follow the prompts within the email to setup and start using their new portal admin account.

PropertyIQ Administration

1 Add New

2 Email*

3 Name*

4 Role*

5 Address

6 I have read and agree to the [Privacy Statement.](#)

7 Cancel 8 Create

Edit users

1. On the Administration page > Users tab, click on a user in the list to view their details
2. Edit the users details as required.
NOTE: The email address for an active user cannot be edited. The role of your own user record cannot be edited.
3. Click *Cancel* to return to the main screen. Any changes will not be saved.
4. Click *Save* button to proceed and save the changes to the user.

The screenshot displays the PropertyIQ Administration interface. On the left, a sidebar contains navigation links: Company Info, Configuration, Buildings, Users, History, and Administration (highlighted). The main area shows the 'Administration' section with a 'Users' tab selected. A list of users is shown, with 'John Smith' highlighted and marked with a blue circle '1'. To the right, the 'Edit User' form is open. It contains several input fields: Email* (pre-filled with 'email2@email.com'), Name* (pre-filled with 'John' and marked with a blue circle '2'), Middle Name, Role* (a dropdown menu), Phone (pre-filled with '02754546290'), Mobile, and Address. At the bottom right of the form, there are two buttons: 'Cancel' (marked with a blue circle '3') and 'Save' (marked with a blue circle '4'). An 'Add New' button is also visible in the top right corner of the form area.

Deactivate/activate users

1. Click on an individual user to view the details
2. Click on the status toggle to change the user's status from *Active* to *Inactive*, or *Inactive* to *Active*.

The screenshot shows the 'Administration' portal with the 'Edit User' form open. The form is for user 'Frank Cao' (marked with a blue circle '1'). The status toggle is 'Active' (marked with a blue circle '2'). The form fields include: Email* (caohunan@gmail.com), Name* (Frank), Middle Name, Address (Cao), Role* (System Administrator), Phone, and Mobile. The form has 'Cancel' and 'Save' buttons at the bottom right. The left sidebar shows a list of users with 'Frank Cao' selected. The top right has a search icon and an 'Add New' button. The bottom right shows 'Last Login: 05/04/2021 07:49 PM'.

You will then see a confirmation message. Click *Yes* to proceed with the change, or *No* to cancel and return to the previous screen.

The confirmation message dialog box titled 'Update' asks 'Are you sure you want to update the status?' and has 'No' and 'Yes' buttons.

Once the status change has been completed, you will see:

- a confirmation message in the top right corner of the screen
- the user's status is updated in the list of users. In the example below, it's changed from *Active* to *Inactive*; and,
- the action is recorded under *History > Audit Trail*.

✓ **Successful**
Admin user updated.
✕

Administration

Q
Add New

Users
Roles

Name ↕	Email ↕	Role ↕	Portal Info ↕
Billy Brylie Bulacso	billy.bulacso+strata@tootwist.com	New Role	Pending Last Login:
Billy Brylie Bulacso	billy.bulacso+admin@tootwist.com	System Administrator	Active Last Login: 16/02/2021 10:52 AM
Caroline Strata	cfong.uat.1@gmail.com	System Administrator	Active Last Login: 18/03/2021 04:02 PM
Envy Bigornia	envy.bigornia@tootwist.com	System Administrator	Active Last Login: 17/02/2021 10:36 AM
Faith Lin	faithlin20@gmail.com	System Administrator	Active Last Login: 06/04/2021 02:00 PM
Frank Cao	caohunan@gmail.com	System Administrator	Inactive Last Login: 01/03/2021 04:13 PM
Michael Horseman	mhorsemanpiq+strata_admin_user@gma	Strata Manager	Active

PropertyIQ
 Nicki Scrivener

- Company Info
- Configuration
- Buildings
- Users
- History**
- Administration

History

From
 To

User Q
 Details Q

Sync History
Audit Trail

Date / Time ↕	User ↕	Details
▼ 08/04/2021 10:54 AM	Nicki Scrivener nicki.scrivener@macquarie.com	Admin Users (UPDATED) caohunan@gmail.com
▲ 08/04/2021 10:54 AM	Nicki Scrivener nicki.scrivener@macquarie.com	Admin Users (UPDATED) caohunan@gmail.com
Field	From	To
Status	ACTIVE	DELETED

Resend invite to pending user

1. Go to Administration page
2. Go to Users tab
3. Find a user with a status of *Pending*. Click on the action menu
4. Select *Resend Invitation*

The screenshot shows the PropertyIQ Administration interface. On the left is a sidebar with navigation links: Company Info, Configuration, Buildings, Users, History, and Administration (marked with a '1'). The main area is titled 'Administration' and contains a search bar and an 'Add New' button. Below this is a tabbed interface with 'Users' (marked with a '2') and 'Roles' tabs. A table of users is displayed with columns: Name, Email, Role, and Portal Info. The table contains four rows: Billy Bryle Bulacso (New Role, Pending), Person Test (Read only, Pending), SA Test 1 (Sample Role, Active), and Michael Horseman (Strata Manager, Active). The 'Person Test' row is highlighted, and its 'Portal Info' column shows 'Pending' (highlighted with a blue box) and 'Last Login:'. A dropdown menu (marked with a '3') is open for this user, showing a 'Resend invitation' option (marked with a '4').

Name	Email	Role	Portal Info
Billy Bryle Bulacso	billy.bulacso+strata@tooltwist.com	New Role	Pending Last Login:
Person Test	cfong.uat.2@gmail.com	Read only	Pending Last Login:
SA Test 1	jazmine.mallari+sa1@tooltwist.com	Sample Role	Active Last Login: 05/04/2021 07:49 PM
Michael Horseman	mhorsemanpiq+strata_admin_user@gmail.com	Strata Manager	Active Last Login: 17/02/2021 10:19 AM

Select *Yes* to proceed, or *No* to cancel and return to the prior screen.

The modal dialog box has a title 'Resend user invitation' and a message: 'This will send Portal invitation email to the user. Do you want to proceed?'. At the bottom are two buttons: 'No' and 'Yes'.

Once the invite has been successfully sent, you will see a confirmation message in the top right corner of the screen and the action is recorded under *History > Audit Trail*.

✓ **Successful**
Successfully sent invitation!

Administration

[Add New](#)

Role ▲

Portal Info ⇅

PropertyIQ

Nicki Scrivener

Company Info

Configuration

Buildings

Users

History

Administration

History

Export

From

User

To

Details

Sync History

Audit Trail

Date / Time ▼	User ↕	Details																		
▲ 08/04/2021 10:25 AM	Nicki Scrivener nicki.scrivener@macquarie.com	Resend Invitation Email via List (ADDED)																		
<table><tr><th>Field</th><th>From</th><th>To</th></tr><tr><td>sentDate</td><td></td><td>08/04/2021 10:25 AM</td></tr><tr><td>sentBy</td><td></td><td>nicki.scrivener@macquarie.com</td></tr><tr><td>role</td><td></td><td>System Administrator</td></tr><tr><td>ipAddress</td><td></td><td>202.43.129.25</td></tr><tr><td>email</td><td></td><td>cfong.usat.2@gmail.com</td></tr></table>			Field	From	To	sentDate		08/04/2021 10:25 AM	sentBy		nicki.scrivener@macquarie.com	role		System Administrator	ipAddress		202.43.129.25	email		cfong.usat.2@gmail.com
Field	From	To																		
sentDate		08/04/2021 10:25 AM																		
sentBy		nicki.scrivener@macquarie.com																		
role		System Administrator																		
ipAddress		202.43.129.25																		
email		cfong.usat.2@gmail.com																		
▼ 08/04/2021 10:05 AM	Nicki Scrivener nicki.scrivener@macquarie.com	Login (ADDED)																		
▼ 08/04/2021 10:05 AM	Nicki Scrivener	Admin Users (UPDATED)																		

ROLES

The *Roles* screen allows you to create additional roles that will control what admin users can view and the actions they can perform. You can create as many roles as necessary.

You will see a default system role 'System Administrator' visible in the list. This default role has permissions for everything and cannot be edited or deleted. The initial portal administrator for your portal account will be assigned this default role.

- *Rules when creating and editing roles:*
 - i. Mandatory fields are role name and at least 1 permission enabled.
 - ii. Role name must be unique and cannot be the same as an existing role (is not case sensitive).

View roles

1. On the Administration page, click on *Roles* tab
2. The name of the role will show here
3. The status of the role will show here
4. A short description of the role will show here

PropertyIQ Administration

John Smith

Company Info
Configuration
Buildings
Users
History
Administration

Users Roles

Add New

Role Name	Status	Description
123 Role	Active	desc
level 1 e	Active	sample dup e
level 2	Active	sample dup
level 3 a	Active	sample dup a
level 4	Active	sample dup
Review	Active	
Role 1	Active	Description
Role 2	Active	Role 2

Create roles

1. On the Administration page > Roles tab, click the *Add New* button in the top right corner.
2. Enter the name of the role. This is a mandatory field, limited to 100 characters.
*NOTE: The name must be **unique** e.g. cannot be used for another role (is not case sensitive).*
3. Enter a short description of the role. This is an optional field, limited to 110 characters.
4. Select at least 1 permission from the list of portal pages and available actions.

PropertyIQ Administration

Create Role

Role Name *

Description

Company Info

- ☒ View Company Info
- ☒ Edit Company Info
- ☒ Add Main Contact
- ☒ Edit & Remove Contact

Configuration

- ☒ View Configuration
- ☐ General
- ☐ Owner
- ☐ Committee
- ☐ Edit Configuration
- ☐ General
- ☐ Owner
- ☐ Committee

Buildings

- ☐ View & Search Buildings
- ☐ Export Buildings

Users

- ☐ View & Search Users

Administration

- ☐ Admin Users

Buttons: Cancel, Create

Edit roles

1. On the Administration page > Roles tab, click on a role in the list to view
2. Edit the role name as required.
*NOTE: The name must be **unique** e.g. cannot be used for another role (is not case sensitive).*
3. Edit the description as required.
4. Edit the permissions as required by selecting/deselecting individual permissions.
5. Click *Cancel* to return to the main screen. Any changes will not be saved.
6. Click *Save* button to proceed and save the changes to the role.

PropertyIQ Administration

Edit Role

Role Name *

Description

Company Info

- ☒ View Company Info
- ☒ Edit Company Info
- ☒ Add Main Contact
- ☒ Edit & Remove Contact

Configuration

- ☐ View Configuration
- ☐ General
- ☐ Owner
- ☐ Committee
- ☐ Edit Configuration
- ☐ General
- ☐ Owner
- ☐ Committee

Buildings

- ☐ View & Search Buildings
- ☐ Export Buildings

Users

- ☐ View & Search Users

Administration

- ☐ Admin Users

Buttons: Cancel, Save

Deactivate/activate roles

1. Click on an individual role to view the details
2. Click on the status toggle to change the role's status from *Active* to *Inactive*, or *Inactive* to *Active*.

Administration

2 Active

Add New

Users Roles

Role Name * New Role

Description Description

1

Company Info

- View Company Info
- Edit Company Info
- Add Main Contact
- Edit & Remove Main contact

Buildings

- View & Search Buildings
- Export Buildings

Users

- View & Search Users

Configuration

- View Configuration
- General
- Owner
- Committee
- Edit Configuration
- General
- Owner
- Committee

Administration

- Admin Users

Cancel Save

You will then see a confirmation message. Click *Yes* to proceed with the change, or *No* to cancel and return to the previous screen.

Update

Are you sure you want to update the status?

No Yes

Once the status change has been completed, you will see:

- a confirmation message in the top right corner of the screen
- the role's status is updated in the list of roles. In the example below, it's changed from *Active* to *Inactive*; and,
- the action is recorded under *History > Audit Trail*.

AUDIT TRAIL – EXAMPLE

Any changes made to users and roles will be recorded in the portal audit trail under the *History > Audit Trail* page.

Refer to the two examples in the blue boxes below.

1. Click on History page
2. Click on Audit Trail tab
3. View date and time of change
4. View the user who made the change
5. View details of change, including
 - a. the type of record that has been changed e.g. Admin Role, Admin User
 - b. the title of the record e.g. Role 1, email1@email.com (user1 login email)
6. Click on the entry to expand and view the fields that were changed

PropertyIQ

John Smith

History

Export

From:

To:

User:

Details:

Sync History Audit Trail

Date / Time	User	Details															
04/02/2021 06:29 PM	John Smith email1@email.com	Admin Roles (UPDATED) Role 1															
<table><thead><tr><th>Field</th><th>From</th><th>To</th></tr></thead><tbody><tr><td>Configuration > Edit Configuration > Enabled</td><td>true</td><td>false</td></tr><tr><td>Configuration > Edit Configuration > Committee > Enabled</td><td>true</td><td>false</td></tr><tr><td>Configuration > Edit Configuration > General > Enabled</td><td>true</td><td>false</td></tr><tr><td>Configuration > Edit Configuration > Owner > Enabled</td><td>true</td><td>false</td></tr></tbody></table>			Field	From	To	Configuration > Edit Configuration > Enabled	true	false	Configuration > Edit Configuration > Committee > Enabled	true	false	Configuration > Edit Configuration > General > Enabled	true	false	Configuration > Edit Configuration > Owner > Enabled	true	false
Field	From	To															
Configuration > Edit Configuration > Enabled	true	false															
Configuration > Edit Configuration > Committee > Enabled	true	false															
Configuration > Edit Configuration > General > Enabled	true	false															
Configuration > Edit Configuration > Owner > Enabled	true	false															
04/02/2021 06:23 PM	John Smith email1@email.com	Admin Users (UPDATED) email3@email.com															
04/02/2021 03:57 PM	Vi Anne Eliseo vi@email.com	Admin Users (UPDATED) email2@email.com															

REGISTER LOT OWNERS

The registration process triggers an email from the portal to your selected lot owners containing a link for them to follow and complete setting up their portal account.

We recommend that you try to ensure the last settled date (the last time the lot changed ownership) for each lot is entered on the lot owner card wherever possible. If you don't have this information, you can still register lot owners for the portal. When registering, you will receive the message *"The below lots will be registered for the portal but are missing a last settled date. The last settled date of the lot is used as the start date filter for the lot's ledger and for documents on the portal. With this field missing, prior lot owner data may be disclosed."*

The lot owner's email address is their username and identifies each portal account.

LOT OWNERS WITH MULTIPLE EMAIL ADDRESSES

- We recommend that you link lot owners that own more than one lot. This automatically updates all linked lots to the principal lot's email address. However, if lots are not linked but each lot has the same email address in the email field of their lot owner card, they will still see the one portal account for all those lots.
- If owners do not want to link the properties they own, and have different email addresses for each lot, then you will be able to create separate portal accounts for each lot.
- If lot owners have more than one email address entered in the email field of their lot owner card, then the **first** email address is the one used for the portal.
- If an owner has multiple lots, with multiple email addresses in the email field of their lot owner cards, and you want their portal accounts to be linked together, make sure that the first email address in the email field of each lot owner card is the same for all their lots.

Last settled date on a lot owner card

Lot/Owner

Lot

S/Plan* 615746 Balandra Gardens 838 Bourke Street

Lot* 2 Unit* 2 Street No* 838

Street Name* Bourke Street

Suburb* DOCKLANDS

Accessory Unit

UOL* 20

UOE* 20

CRN 0000000316

Owner Info

Owner Name* Georgina Downer

(Ah) 03 5454 7676 Email georginadowner@hotmail.com

(Bh) Salutation Mrs Downer

Mobile 0448 345 545 Contact Name

Fax Paid to 30/11/2018 Last Settled 01/10/2015

Committee Member: Y Committee Member Status: Active

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

Expandable Sections:

- Owner Address
- Legal Residence Address
- Joint Owner
- Power of Attorney
- Tenancy Details

Buttons: Save Cancel

1. Select *Register Lot Owners*
2. By default, lot owners that have an email address are shown but you can toggle to view *All*, or *Missing Email*. If you select the missing email tab you can see all lot owners that don't have an email address on their lot card – you can use the view button to open their lot card and add an email address. (lot owners must have an email address to be registered for the portal)
3. By default, lot owners that are not yet registered are shown but you can toggle to view *All* or *Registered*.
4. By default, lot owners that belong to active buildings are shown.
5. You can enter some key letters in any of the empty boxes on this line to refine your search. Click on a lot owner detail line to highlight it.
6. You can select lot owners in bulk on the top line or select lot owners individually
7. A red cross shows here for all lot owners that aren't already registered with the portal. If the lot owner is already registered with the portal a green tick shows here.
8. The strata plan or OC number the lot belongs to shows in this column
9. The lot number shows in this column
10. The unit number shows in this column
11. The lot owner name shows in this column
12. If the lot owner has an email address recorded on their lot card, it shows in this column
13. If the building the lot is in has a name, it shows in this column
14. If the last settled date has been entered on the low owner card, it shows here.
15. A red cross shows here for all lot owners that are not linked to another lot owner. If the lot owner is linked to another lot owner, a green tick shows here.
16. *Register* to start the registration process.
17. *View* opens the lot owner's card of the lot owner you have highlighted on screen (if you have more than one lot owner highlighted on the screen it will open the lot owner card of the first owner you have highlighted on the screen)

1. Lot owners that have a last settled date show here.
2. Lot owners that don't have a last settled date recorded on their lot owner card appear here. You can double click on any lot in the bottom grid to open the lot card and add the last settled date.
3. *Register* to proceed.
4. *Cancel* to exit without proceeding.

Register Lots

Lots to be registered

S/Plan	Lot	Unit	Owner	Owner Email	Building Name	Last Settled
4343	3	3	Gerry Krone	fran@gmail.com	The Yarra	4/10/2018
6143	1	1	Peter Poulos	mystrataclients@gmail.com	Yarra Gardens	1/7/2017
5435	2	2	Bethany Johanson	bjohanson@gmail.com	Hilton Terraces	23/8/2017

Lots to be registered without last settled date

The below lots will be registered for the portal but are **missing a last settled date**. The settled date of the lot is used as the start date filter for the lots ledger and for documents on the portal. With this field missing, prior lot owner data may be disclosed.

S/Plan	Lot	Unit	Owner	Owner Email	Building Name	Last Settled
4345	1	1	Graham Jacobson	gj@gmail.com	Dorinda Waters	Missing Last Settled Date.

Register

Cancel

Confirm that you wish to proceed.

?

Are you sure you want to register the selected lots?

NOTE: The lot details will be made available to the portal, and when the next sync is run the owner/s will receive an email from the portal to activate their account.

No

Yes

When the next portal sync is completed overnight, your lot owners will receive an email from the portal asking them to activate their account. The lot owner then follows the instructions to complete their registration.

The lot owner's email looks something like this:

Activate your PropertyIQ portal account



You've been invited by your strata company to register for the PropertyIQ portal.

What does this mean?

You'll have 24-hour access to building and lot information, documents, meetings and more.

What you need to do

To activate your portal account, follow these steps:

- Go to <https://portal.sit.propertyiq.com.au>
- Enter email
- Enter temporary password
- Set your new password
- Login

Important: This temporary password will expire in 24 hours. If you activate your portal account after this time, follow the above link and click 'Forgot Password' to be sent a new one.

Need help?

If you have any questions, please **contact your Strata Manager** directly.

If you don't want to activate a portal account, simply disregard this email.

[Privacy Policy](#)

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Owners that are registered with the portal show on the *Registered* tab.

Register Lot Owners with Portal V2

Register Lot Owners with Portal V2

All

Has Email

Missing Email

All

Registered

Not Registered

All

Active

InActive

<input type="checkbox"/>	Regist...	S/Plan	Lot	Unit	Owner	Owner Email	Building Name	Last Settled	Is Lin...
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	✓	1	3	3	Brena Mulligan	fayeg@propertyiq.com.au	The Bachelor ...	5/6/2017	✓
<input type="checkbox"/>	✓	1	5	5	Edward McManus	edward.mcmanus@email.com	The Bachelor ...	1/8/2014	✓

Register

De-register

View

REGISTER COMMITTEE/COUNCIL MEMBERS

The portal allows you to register committee/council members. You might choose to make extra information available to committee member accounts.

1. From the Portal Control Panel select *Register Committee Members*
2. By default, members that have an email address are shown but you can toggle to view *All*, or *Missing Email*. If you select the missing email tab you can see all committee members that don't have an email address on their committee card. (committee members must have an email address to be registered for the portal)
3. By default, members that are not yet registered are shown but you can toggle to view *All* or *Registered*
4. Enter some key letters in any of the empty boxes on this line to refine your search
5. You can select lot owners in bulk on the top line or select lot owners individually
6. Members that are already registered with the portal have a green tick in this column. Committee/council members that are not already registered with the portal have a red cross in this column.
7. The strata plan number or OC number for the building the committee member is associated with shows in this column
8. If the building the member is associated with has a name, it shows in this column
9. The name of the committee/council member shows in this column
10. If a committee position has been recorded on the member's card, it shows here
11. If the member has an email address, it shows here
12. A green tick shows for all committee/council members that are also lot owners. A red tick shows here for committee/council members that are not lot owners
13. *Register* to start the registration process
14. *View* to open the committee/council card for a member you have highlighted on the screen

PropertyIQ Strata File To Do

Register Committee Members with Portal V2

Registered C.T.S. Building Name Name Position Email Lot Owner

1 2 3 4 5 6 7 8 9 10 11 12 13 14

Global Settings

Document Type Portal Category

Access Register Attachment General

Agency Agreement Building

By Laws Building

bylaws Building

Correspondence Lot

Due Notice Lot

Financial Financial

Meeting Notice Meetings

1543 4343 The Yarra Annabel Crozier fran@gmail.com ✓

1543 4345 Dorinda Waters Graham Jacobson g@gmail.com ✓

6143 6143 Yarra Gardens Peter Poulos Secretary mystrataclients@gmail.com ✓

6143 6143 Yarra Gardens Allenby Pty Ltd Sec/treas mystrataclients@gmail.com ✓

6143 6143 Yarra Gardens Arthur Sorenson Chairperson mystrataclients@gmail.com ✓

6143 6143 Yarra Gardens Arthur Sorenson Manager mystrataclients@gmail.com ✓

6143 6143 Yarra Gardens Georgina Downer Treasurer mystrataclients@gmail.com ✓

6545 6545 Swan City Towers Rob Thomas Building-manager jack.dobinson@gmail.com.au ✓

00002 Mrs Main Joe Blow Chairperson accounts@msggraphics.net.au ✗

10453 The Tempo Vaanya LiasonChairSec sbussinger@oconnorstrata.com.au ✓

12376 Greenway Plaza Apart... George Costanza Chair/sec nickis@propertyiq.com.au ✓

12378 River Apartments JAMES SMITH Treasurer nickis@propertyiq.com.au ✓

12379 Precinct Centre Lan Kim as Trustee for JKM Entities ACN ... Chair/treas/sec nickis@propertyiq.com.au ✓

18421 Jacksons Hill Kelly Fell Chair/treas kellyfellover@qpm.com; kelly@gmail.com ✓

18421 Jacksons Hill Drake Lively Chairperson drake@yahoo.com.au ✓

19831 Dolwing Apartments Peter Parker Sec/treas pparker@gmail.com ✓

19831 Dolwing Apartments Mary Jane Watson Chairperson mj@live.com.au ✓

25654 Princess Towers Paula Vincent Chairperson paula@gmail.com ✓

Register De-register View

Logged in as: admin
user Administrator
9/18/2019 2/9/2019

1. Committee/council members that can be registered show here.
2. Committee/council members that can't be registered and the reason show here. In this case the committee member does not have a position recorded. You would need to enter a position on the committee/council member card before proceeding.
3. Register to complete the process. This triggers an email to the committee/council member so they can complete their registration with the portal.
4. Cancel to close without proceeding to registration.

Register Committee

Committee members to be registered

S/Plan	Building Name	Name	Position	Email	Lot Owner
745345	Moonee Towers	Silvia Setiana	Member	ssetiana123@gmail.com	✓
690765	Westmead Centre	Julie Harrison	Chairperson	julie@harrisons.com.au	✓
690765	Westmead Centre	Iris Calworth	Director	Iris@gmail.com	✓
888777	Hornsby Towers	Bailey Brown	Treasurer	mystratacustomers@gmail....	✓

Committee members that cannot be registered

The below committee members are missing a mandatory email address and/or a committee position. To enable Portal registration, please enter a valid email address and/or a committee position.

S/Plan	Building Name	Name	Position	Email	Lot Owner	Reason
965765	The Terrace	Aarav Goninder		aarav@gv.com.au	✓	Missing Position.

3

4

Register

Cancel

When the next automated portal sync is completed the committee/council member will receive an email from the portal asking them to activate their account.

If the committee/council member already has a portal account as a lot owner, they will be able to see additional information in the same portal account. They will receive an email notification to let them know they have been granted additional access in their account.

If the committee/council member is not a lot owner or is a lot owner but has not already been registered for the portal, they will receive a new registration email to activate a committee portal account.

Committee portal access



My Strata Co has updated your existing PropertyIQ Portal account to provide committee member access. This will provide you with added features and benefits.

Log in to your portal account at <https://portal.propertyiq.com.au> to find out more.

Need help?

If you're having trouble logging in or would like to discuss the features and benefits of the portal, please **contact your Strata Manager** directly.

[Privacy Policy](#)

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This email and any attachment is confidential. If you are not the intended recipient, please delete this message. Macquarie does not guarantee the integrity of any emails or attachments. For important disclosures and information about the incorporation and regulated status of Macquarie Group entities please see: www.macquarie.com/disclosures

DE-REGISTER LOT OWNERS

If a lot owner no longer wants to have a portal account, you can de-register their account.

The following rules apply when de-registering an account:

- If the lot owner only has one portal account and you select to de-register their account, their entire portal login is deactivated
- If the lot owner has multiple properties/lots in the one portal account, then only the information for the lot they de-register will be removed from the account. Their account will remain active and they will only see information for the registered lots/properties.
- If they are a lot owner and also have a committee member portal account, and have one lot owner that you want to de-register, then their portal account will remain active but only as a committee member
- If you want to deactivate a person's entire portal account, then you will need to ensure you de-register all lots/committee member registrations attached to that email, so the portal account login is disabled

1. Select the Registered filter
2. Highlight the lot owner(s) you want to de-register
3. *De-register*

Register Lot Owners with Portal V2

Register Lot Owners with Portal V2

1

All Has Email Missing Email All Registered Not Registered All Active InActive

<input checked="" type="checkbox"/>	Registered	S/Plan	Lot	Unit	Owner	Owner Email	Building Name	Last Settled	Is Linked Owner
<input type="checkbox"/>					Gerry				
<input checked="" type="checkbox"/>	✓	4343	3	3	Gerry Krone	fran@gmail.com	The Yarra	4/10/2018	✓

2

3

Register De-register View

When the next portal sync is completed, the lot owner's portal account will be updated, and the de-registration will occur.

DE-REGISTER COMMITTEE/COUNCIL MEMBERS

If a committee/council member no longer wants to have a portal account, you can de-register their account

The following rules apply when de-registering an account:

- If the committee member only has one property registered on the portal and you de-register that lot, their entire portal account is deactivated.
- If the lot owner has multiple properties in the one portal account, then only the information for the property you deregister will be removed from the account. The account will remain active and the lot owner/committee member will only see information for the properties for which they still have a registered portal account
- When a portal account is for a committee member and they are also a lot owner – if you de-register their committee account, their portal account will remain active but only as a lot owner. They won't have committee privileges.
- If you want to disable an entire portal account for a user, you will need to ensure you de-register all lots/committee member registrations attached to that email, so the portal login is disabled.

Steps:

1. From the Registered tab, highlight the committee/council member(s) you want to de-register
2. *De-register*

When the next portal sync is completed, the committee/council members portal account will be updated, and the de-registration will occur.

Regist...	S/Plan	Building Name	Name	Position	Email	LotOw...	
<input checked="" type="checkbox"/>	✓	14	ST JAMES PARK	Alan Shearer	member	alanshearer@gmail.com	✓
<input type="checkbox"/>	✓	692	Skyline	Marnie Batlow	manager	rohits@propertyiq.com.au	✓
<input type="checkbox"/>	✓	692	Skyline	Alicia Stanton	secretary	rohits@propertyiq.com.au	✓
<input type="checkbox"/>	✓	692	Skyline	Bradley Earnshaw	member	rohits@propertyiq.com.au	✓
<input type="checkbox"/>	✓	99999	The Bachelor Pad	Brena Mulligan	building-manager	fayeg@propertyiq.com.au	✓
<input type="checkbox"/>	✓	270976	Moorings on Cavill	Rocco Silvester	secretary	fayeg@propertyiq.com.au	✓
<input type="checkbox"/>	✓	888777	Hornsby Towers	Alan Swanden	secretary	fayeg@propertyiq.com.au	✓

Register De-register View



A committee/council members registration will be removed automatically when you record their resignation on their committee card.

WHAT HAPPENS WHEN A LOT OWNER WITH A PORTAL ACCOUNT CHANGES THEIR EMAIL ADDRESS?

- If the lot owner only owns one lot and you change the email address on their lot owner card, their username (email address) will update to their new email address in the next sync.
- If you change the email address on a lot owner card and that lot is one of multiple lots linked to the owners account and the owner only wants to update the email address for one lot, that lot remains linked to the original portal account. The new email address shows on the lot owner card but their portal username (email address) remains as the original
- If you change the email address for *all* the lots owned by an owner, their username (email address) for the portal will update to their new email address in the next sync.

WHAT HAPPENS IF YOU ACCIDENTALLY CREATE A PORTAL ACCOUNT WITH MULTIPLE LOTS USING THE SAME EMAIL AND NEED TO DE-LINK ONE OF THE LOTS FROM THE PORTAL ACCOUNT?

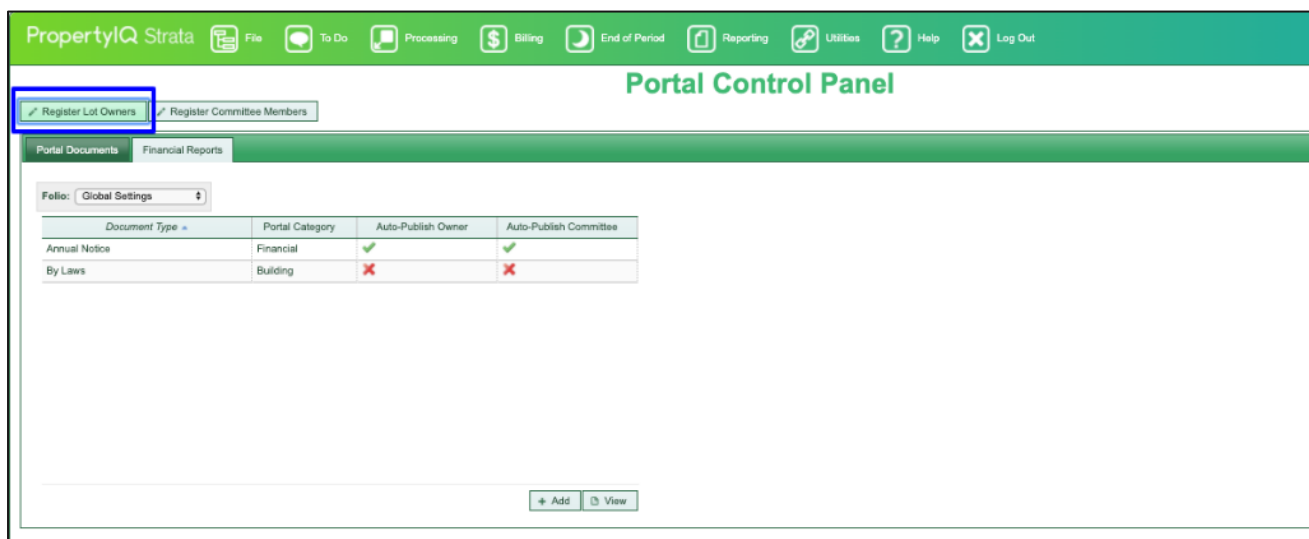
Scenario:

Your PropertyIQ database has two or more lot cards with the same email address. You register those lots for the portal, which creates a single portal account linked to that email and showing the lot information for all the lots selected.

You subsequently realise that some (but not all) of the lot accounts should **not** be linked to that portal account, and they need to have their own portal account or need to be linked to a different email address.

Solution:

Step 1 – From the portal control panel, select *Register Lot Owners* button



Step 2

1. Select *Registered* filter to view lots that are registered with the portal
2. Select the lots you want to de-register
3. Select *De-register*

The lot portal accounts you selected will be de-registered on the next portal sync.

Register Lot Owners with Portal V2									
Register Lot Owners with Portal V2									
Registered	C.T.S.	Lot	Unit	Owner	Owner Email	Building Name	Last Settle...	Is Linked Own...	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1008	3	3	Ben James	rebeccap@propertyiq.com.au	Jordan Mews			✓
<input checked="" type="checkbox"/>	1472	4	4	Harry Kane	hkane@testing.com	ST JAMES PARK	19/2/2018		✗
<input checked="" type="checkbox"/>	2709	1	1	Maddison Furness	fayelynetgoodman@gmail.com	Moorings on Cavill			✓
<input checked="" type="checkbox"/>	2709	6	6	Costa Gianapoulos	costag@hotmail.com	Moorings on Cavill	1/2/2017		✓
<input checked="" type="checkbox"/>	4343	4	4	Blair Fitzgibbons	fran@gmail.com	The Yarra			✗
<input checked="" type="checkbox"/>	4343	5	5	Gerry Krone	fran@gmail.com	The Yarra			✗
<input checked="" type="checkbox"/>	4346	1	1	St Kilda Developers	skd@gmail.com	The Charmwood	1/9/2018		✓
<input checked="" type="checkbox"/>	4346	2	2	St Kilda Developers	skd@gmail.com	The Charmwood	1/9/2018		✓
<input checked="" type="checkbox"/>	4346	3	3	St Kilda Developers	skd@gmail.com	The Charmwood	1/9/2018		✓
<input checked="" type="checkbox"/>	4346	4	4	St Kilda Developers	skd@gmail.com	The Charmwood	1/9/2018		✓
<input checked="" type="checkbox"/>	4356	1	1	Colyton Pty Ltd_21	janne@hotmail.com	The Mariner			✓
<input checked="" type="checkbox"/>	4356	2	2	Colyton Pty Ltd_21	janne@hotmail.com	The Mariner			✓
<input checked="" type="checkbox"/>	5435	2	2	Bethany Johanson	bjohanson@gmail.com	Hilton Terraces	23/8/2017		✗
<input checked="" type="checkbox"/>	5454	2	2	Clancy Beresfield	cg@hotmail.com	Greenfriars			✗
<input checked="" type="checkbox"/>	6776	1	1	Bartim Dev PL	bb@gmail.com	The Bay	1/8/2018		✓
<input checked="" type="checkbox"/>	6776	2	2	Bartim Dev PL	bb@gmail.com	The Bay	1/8/2018		✓
<input checked="" type="checkbox"/>	6776	3	3	Bartim Dev PL	bb@gmail.com	The Bay	1/8/2018		✓
<input checked="" type="checkbox"/>	7231	1	1	Bethany Clark	mystrataclients@gmail.com	Marrickville Plaza			✓

Step 3

Make sure you wait for the next sync to complete, then:

1. Change the email address on the lot card (remember if there are multiple email addresses on a lot card the portal uses the first one)
2. Re-register the lot(s) with the new email address
 - a. If the new email address is not being used on any other lot or committee card, PropertyIQ will create a new portal account for that email address, and link all lots with that email address. A new portal account registration email will be sent on the next portal sync.
 - b. If the new email address is being used for another portal account, no registration email is sent but the portal account will show information about the lot's you've registered after the next sync is completed.



You must wait for a sync to be completed before changing the email address and re-registering the lots, or your change won't take effect.

WHAT HAPPENS WHEN YOU PROCESS A CHANGE OF OWNER FOR A LOT THAT HAS A PORTAL ACCOUNT?

When you process a change of owner the portal account for that lot is automatically de-activated during the next automatic sync and you will be asked whether you want to register the new lot owner for the portal.

Bulk Change Owner

12484 1 / 1

Strata Schemes Management Act 1996 – Sec3on 118, 119 and 120
Community Land Management Act 1989 – Sec3ons 46, 46A and 47

NOTICE OF INTEREST/LEASE/MORTGAGE

To: The Secretary – Owners Corpora3on Strata Plan No/DP No : 888777

PERSON ACQUIRING INTEREST

Full name(s) : Amelia Morton
Address for service of notices : Po Box 4, Hornsby NSW 2077
Lot(s) concerned : 4
Nature of Interest: Change of Address Details / Change of Ownership (Delete which does not apply)
Date interest acquired :
Nominee(for companies only): Full name :
Address for service of notices :

MANNER IN WHICH INTEREST AROSE

PURCHASE

LEASE/SUBLEASE, ASSIGNMENT OF LEASE/SUBLEASE

Name of lessee/sub-lessee/assignee :
Date of commencement/assignment :
Managing Agent :

MORTGAGEE TAKING POSSESSION

Name of Mortgagor :

Document 12 of 12 Delete Refresh Upload Document

Changing Owner For Lot

Name Section 22 notice.pdf Size 185.33 kB
S/Plan* 283423 Morada Place 25
Lot* 2/2 Rosalie Trinder

New Owner Details

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

Or Enter the new owners details below

Owner Details

Owner Name* Email
(Ah) Salutation
(Bh) Contact Name
Mobile Fax

Owner Address

Mailing Address* Suburb
State P/Code

Other

Settlement Date*
Property Manager
If no property manager is selected, saving will clear the existing manager.

The current owner is registered on the portal.
Do you want the new owner to be registered for the portal? Yes No

Save Close

If you select the new owner to be registered on the portal, their activation email is automatically sent in the next automatic sync- you don't have to complete any further steps.

If the lot owner owns multiple lots and only sells one of their lots, their portal account remains active but new information about the lot they have sold no longer shows on their portal account.

BUILDING – PROPERTY INFORMATION

- All information displayed in the portal is taken from the Building card under File > Buildings > Building card BUILDING – INSURANCE
- All information displayed in the portal is taken from the active insurance policies listed under File > Buildings > Building card > Info > Insurance

BUILDING – MY LOTS

- The information for UOE/UOL and *Levy Paid To* date is taken from the Lot card under File > Lots
- The information for *Property Manager* is taken from the Lot card under File > Lot > Contact > Tenancy Details > Property Manager
- The information for *Tenant* is taken from the Lot card under File > Lot > Contact > Tenancy Details
- The email address is taken from the Lot card under File > Lots > Lot card > *Email*
- The address is taken from the Lot card under File > Lots > Lot card > Contact > *Owner Address*
- The mobile is taken from the Lot card under File > Lots > Lot card > *Mobile*

BUILDING – STRATA MANAGER DETAILS

- The strata manager's name comes from the Building card under File > Building > *Manager*
- The strata manager's contact details (address, email, phone) come from the company details listed for the building's Folio under Utilities > Settings > *Company Details*

BUILDING – ONSITE MANAGER / CARETAKER

- The information for *Onsite Manager* comes from the Building card under File > Building > Settings > Onsite Manager
- The information for *Caretaker* is taken from the Building card under File > Building > Settings > Caretaker

BUILDING – COMMITTEE MEMBERS

Committee member details showing in the portal come from the Building card under File > Building > Info > Committee and includes any person listed with a status of *Active*. The portal displays their name and their position.

FINANCIAL – BANK BALANCES

- The *bank account balances* shown (*Admin Fund, Sinking/Capital Works/Maintenance/Reserve Fund and Bank Balances*) comes from the Building card under File > Building > Financials > Bank Balances.
- The balance is the sum of the Admin fund and the Sinking/Capital Works/Reserve funds.
- The balances shown in the portal are updated in each overnight sync and will be the balance as at close of business yesterday.
- The balance shown for *Investment Funds* comes from the Building card under File > Building > Financials > Bank Balances, and is the consolidated total of all investment type bank accounts.
- The balance shown in the portal is updated in each overnight sync and will be the balance as at close of business yesterday
- The balance shown for *Arrears* is taken from the Building card under File > Building > Financials > Trail Balance and is the consolidated total of the 'Receivable' Asset account for both Admin and Sinking/Capital Works/Maintenance Funds. The balance shown in portal is updated in each overnight sync and will be as at close of business yesterday.

FINANCIAL – GRAPHS

- All information displayed is based on the building's financial year period and displays all prior financial periods that are available from PropertyIQ. For new buildings added to PropertyIQ, there will be no historical periods available
- The *Bank Balances* graph displays the totals for each fund, total bank balance, investment funds and arrears balances as at the end of that financial year, and is taken from the Building card under File > Building > Financials > Bank Balances, using the financial year dropdown filter
- The *Year on Year Performance* graph displays the total balance for each fund only as at the end of that financial year, and is taken from the Building card under File > Building > Financials > Bank Balances, using the financial year dropdown filter

FINANCIAL – DETAILED REPORTS

The detailed financial reports that can be requested from the portal are live documents, as the report/s are generated from your PropertyIQ at the time the request is made.

LEVIES – ARREARS BALANCE

The total arrears balance shown at the top of the Levies page is a consolidated total of the arrears levy balance plus penalty interest (if applicable) for all lot/s within the selected building

LEVIES – NEXT LEVY DUE BALANCE

The next levy due amount shown at the top of the Levies page is the total amount due for the next upcoming levy/fee for all lot/s within the selected building. For example, if Lot 1 and Lot 2 both have \$100 due on 1st February, Next Levy Due amount will show as \$200 due on 1st February. If there are multiple upcoming levies/fees in the year, the Next Levy Due amount is for the next immediate levy/fee due. For example, 1 st February. Once that due date passes, it will then show details for the next one. For example, 1st May.

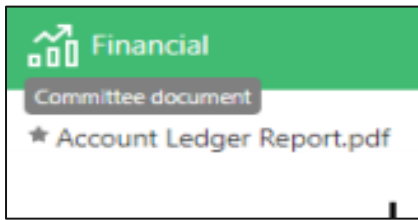
LEVIES – LOT LEDGER

- The ledger transactions displayed in the portal are taken from the Lot card under File > Lot > Ledger. By default, the transactions are filtered from today's date, to the beginning of time or the lot's last settled date.
- Due Date is taken from the date for that levy/fee in PropertyIQ
- Description is taken from the details for that levy/fee in PropertyIQ
- Amount is taken from the total for that levy/fee in PropertyIQ
- Levy/fee payments show in the portal as negative amounts e.g. -\$100 o Balance is the running balance of all transactions
- Transfers to/from credit show in the ledger only if the transfer has occurred between different schedules
- The lots arrears balance and interest balance come from the lot owner card under File > Lot > Ledger, and are the Balance and Interest (Int) values shown at the top of the ledger
- The ledger balances shown in the portal are updated in each overnight sync. They are the balance as at close of business yesterday.

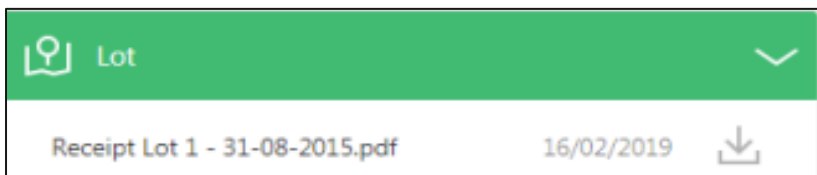
DOCUMENTS

Documents made available to lot owners and committee/council members show in the same place on the portal in the Documents page

- Committee/Council member documents have a small star icon beside them. If you roll your mouse over the icon you will see the words *Committee document*



- **Levy/fee receipts** are automatically available in the portal for lot owners and are available under the Lot document category.
 - They are named using the Lot number and Receipt date (date it was receipted in PropertyIQ). See example below.
 - Receipts are created for every receipt transaction in the lot's ledger from the beginning of time and/or the lot's last settled date. If there are multiple receipts processed on the same day, only one receipt document is created in the portal



MEETINGS

- The information for upcoming and past meetings comes from the meetings entered in PropertyIQ under To Do > Meetings
- The information for each meeting (building, type, date, time, venue) comes from the Meeting card under To Do > Meetings > Meeting card
- The Agenda and Minutes icons allow portal users to download a copy of the Notice or Minutes for the meeting if you have created and generated the notice or minutes using the Meetings module. If you have not generated your notices and minutes using the meetings module in PropertyIQ you can still publish meeting documents using the document publishing process above.

{{agent_block_1}}
 {{agent_block_2}}
 {{agent_block_3}}
 {{agent_block_4}}
 {{agent_block_5}}
 {{agent_block_6}}

{{current_date}}

{{recipient_block_1}}
 {{recipient_block_2}}
 {{recipient_block_3}}
 {{recipient_block_4}} {{recipient_block_5}}

Dear {{recipient_block_1}}

We're contacting you about our new lot owner and committee portal now available. You'll have 24-hour access to building and lot information, reports, documents and more.

Benefits of our portal

- Everything in one place - view all of your properties in one portal account
- Automated notifications for new documents, upcoming levies and meetings
- Quick and easy levy payments

Here's how it works



Register for a portal account using a valid email address.



You'll be able to view building and lot information and download documents and reports at your convenience.



Automatic notifications by email and in the portal when a new document is available for viewing and you have an upcoming levy or meeting.



Pay your levies using DEFT Payment systems



You'll be able to view and download your levies, receipts and statements



For more information, simply get in touch

Getting started

To get started, contact us by calling {{phone}} or emailing {{email}} and we'll send you a portal invitation by email with simple registration instructions.

Yours sincerely

{{Manager}}
 {{agent_block_1}}