



Portal hints and tips and FAQs

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HELPFUL TIPS

We'd like to draw your attention to these tips as they will help to ensure your portal configuration and ongoing maintenance is trouble free. There are also lots of troubleshoot hints to help you when setting up and maintaining the portal for your lot owners and committee members. Some of these items are also covered in the FAQs section below.

There are detailed instructions for setting up and maintaining your portal account in the *Portal Guide for Strata Managers*.

- ✓ Login URL for Portal: <https://portal.propertyiq.com.au/login>
- ✓ Portal users will receive portal invitations and notifications from: no-reply@notify-portal.propertyiq.com.au

IMPORTANCE OF EMAIL ADDRESSES IN PROPERTYIQ AND THE PORTAL

- All PropertyIQ portal accounts are created using an email address – from the lot card for a lot owner and from the committee member card for a committee/council member
- The email address is used:
 - to send the initial PropertyIQ portal invitation for activating the lot owners or committee/council members portal account
 - as the username on the portal login screen
 - for automated email notifications from the portal. For example, a lot owner can select to be notified when new documents have been uploaded to the portal, a new meeting is created or when levies/fees are due.
- Any lots using the same email address are linked to **one** portal account
- You should ensure all email addresses are valid and correct before registering your lot owners or committee/council members for the portal. You can review all email addresses in PropertyIQ in a number of ways:
 - Export lot owner details from the lot owners screen. (File>Lots>select all>Export)
 - Export committee member details from the building screen. (File>Buildings>Export>Committee Committee/council members)
 - Go to the control panel under the utilities menu. Select *register lot owners*. This will display all email addresses for lot owners that are not already registered for the portal. Note: you can also view lots that are missing an email address by selecting the Missing Email tab from the *register lot owners* function.

EMAIL ADDRESS USED FOR YOUR PORTAL ADMINISTRATOR ACCOUNT

- 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 lot cards attached to inactive buildings.
- 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:
 - Your portal administrator access is different to a lot owner's and requires a different email address (which becomes the username for your account)
 - For example if your portal administrator's email is janedoe@stratacompany.com.au this email address can't be in use for a committee/council member. They need to have another email address. For example, johnsmith@gmail.com. Be aware of this if any of your own team own lots in a building managed on PropertyIQ and have their work email entered on their lot card.
 - Each account only has one administrator
 - If you have *more* than one instance of PropertyIQ, you will need a different administrator email address for each instance.

PORTAL INVITATION EMAIL TO LOT OWNERS OR COMMITTEE/COUNCIL MEMBERS, WITH A TEMPORARY PASSWORD

- Lot owners or committee/council members will be provided a link, email and a temporary password to setup their new portal account
- The temporary password in the invitation **expires within 24 hours**. If they want to activate their portal account more than 24 hours after receiving the email, they will need to reset their password.
- We recommend you consider the best time to send these so your owners will have time to read and action the email invitation

PORTAL ACCOUNT PASSWORD

- There are minimum password requirements for portal passwords:
- A password must contain:
 - At least **8 characters**
 - An **uppercase** letter
 - A **lowercase** letter
 - A **number**
 - A **special character** from this set: ! @ # \$ % ^ & *
- *For example:* Abcdef1!

IMPROVING PORTAL ADOPTION & UPTAKE IN YOUR BUSINESS

Tips to improve the adoption and uptake of the portal in your business:

- Add a custom levy message on your Due/Fee Notices to highlight the portal is available and that documents can be accessed online
- Send a letter or email to your lot owners and members to let them know the portal is available, outlining features and benefits.
 - We have a standard template available [here](#) and in the *Portal Guide for Strata Managers*
- Send a bulk SMS to lot owners using PropertyIQ's SMS capability
- Add a notification about the portal on the cover page of your meeting notices or minutes
- Have your staff proactively offer the portal during phone calls with lot owners and members; provide them with a script about the portal features, benefits and easy activation process

FAQS & TROUBLESHOOTING

Below is an extract from the FAQs and Troubleshooting section of the Portal Guide for Strata Managers.

We recommend you familiarise yourself with these.

PORTAL FEATURES

WHAT ARE THE MAIN FEATURES OF THE PORTAL?

Your lot owners and committee/council members can:

- View building and lot information
- View building financial bank balances across multiple financial years
- Request a (and receive by email) a live set of building financial reports
- Download building financial reports
- View and download copies of documents
- View upcoming and past meetings
- View levies and receipts, and
- Download levy statements
- Pay levies via a link to the DEFT website
- Lot owners can elect to receive automatic notifications for upcoming levies, upcoming meetings and new uploaded documents

You can:

- Customise the level of access to information (lot owner vs committee/council member) and customise which features, pages, fields are displayed

WHAT ARE THE BENEFITS OF THE PORTAL?

- It allows access to important information and documents 24/7 for lot owners and committee/council members
- It will reduce direct enquiries and requests from lot owners and committee/council members, and save time and money distributing material via post or email
- It's been designed using bank grade security, similar to other Macquarie products such as DEFT
- It can be accessed via the internet from any location

WHAT DEVICES WORK WITH THE PORTAL?

- It's optimised for use on computers, mobiles and tablets

IS THERE A MOBILE APP FOR THE PORTAL?

- No. There currently isn't a mobile 'app'
- However, it is optimised for mobiles, meaning it looks and feels like an app when viewing on your mobile

HOW DOES THE INFORMATION IN THE PORTAL REMAIN UP TO DATE?

- The Portal synchronises (syncs) with your company's PropertyIQ data overnight, so the information displayed on the portal will be as at the end of the last business day.

PORTAL ACCOUNTS

HOW ARE PORTAL ACCOUNTS CREATED?

- All portal accounts are created using an email address – from the lot card for a lot owner and from the committee member card for a committee/council member
- The email address is used:
 - to send the initial portal invitation for activating the lot owners or committee/council members portal account
 - as the username on the portal login screen
 - for automated email notifications from the portal. For example, a lot owner can select to be notified when new documents have been uploaded to the portal, a new meeting is created or when levies/fees are due.
- Any lots using the same email address are linked to **one** portal account
- You should ensure all email addresses are valid and correct before registering your lot owners or committee/council members for the portal. You can review all email addresses in PropertyIQ in a number of ways:
 - Export lot owner details from the lot owners screen. (File>Lots>select all>Export)
 - Export committee member details from the building screen. (File>Buildings>Export>Committee Committee/council members)
 - Go to the control panel under the utilities menu. Select *Register lot owners* or *Register Committee members*. By default, this displays all non-registered entities that have an email address. Note: you can also view entities that are missing an email address by selecting the *Missing Email* tab.

ARE THERE ANY REQUIREMENTS TO ACTIVATE A PORTAL ACCOUNT?

- The initial portal invitation received by your lot owners or committee/council members contains steps to activate a portal account
- The lot owner/member needs to complete these steps:
 - click on the link to the portal login page
 - enter their email address (the email address their portal invitation was sent to)
 - enter the temporary password, which is provided in the invitation email
 - set a new password for their portal account
- There are minimum password requirements for the portal.
 - A password must contain:
 - At least **8 characters**
 - An **uppercase** letter
 - A **lowercase** letter
 - A **number**
 - A **special character** from this set: ! @ # \$ % ^ & *
 - For example: Abcdef1!

For further information, see the registration steps in the Portal Guide for Strata Managers.

WHAT IF A LOT OWNER/MEMBER HASN'T RECEIVED THEIR PORTAL INVITATION EMAIL?

- It might be due to any of the following reasons:
 - The email has been caught in the lot owners or committee/council members spam folder
 - The senders email address – the automated PropertyIQ portal address - might have been flagged as a spam source by the lot owners or committee/council members email provider, blocking the delivery to their inbox
 - The incorrect email address has been entered in your PropertyIQ

Steps you can take:

- Ask the lot owner/member to check their spam or junk folder
- Check the email address in PropertyIQ to make sure it's correct and update if it's incorrect. Remember you will need to wait until the next portal sync has completed as this updates the email address in the portal
- Once the new email has been synced to the portal, re-send the portal invitation email to the correct email address.

- Your portal administrator will need to log into your company's portal administrator account and navigate to the users page. Find the user and click the Action button and you will see an option to resend invitation email. Users page > search and find the user > click the action button > click 'resend invitation email' For full instructions, see the Portal Guide for Strata Managers.

CAN A LOT OWNER/MEMBER SEE PROPERTIES ACROSS DIFFERENT STRATA MANAGEMENT BUSINESSES?

- Yes, the portal will display properties across different strata managers that are using PropertyIQ's portal
- When viewing different properties, the information, pages and features displayed will change depending on the property being viewed and each strata manager's portal configuration and access controls
- Lot owners and committee/council members only need one login to access all properties in the one place

CAN MULTIPLE PROPERTIES BE VIEWED IN ONE PORTAL ACCOUNT?

- Yes, just use the same email address for all relevant lots and committee/council committee/council members in PropertyIQ
- If the lot has the same email address in the email field of their lot owner card, they will have one portal account for all those lots
- If the committee/council member has the same email address in the email field of their committee card, they will have one portal account for both lot owner and committee/council member access
- If owners do not want to link the properties they own, they must have different email addresses for each lot. Then you will be able to create separate portal accounts for each lot

PORTAL ACCOUNT EMAIL ADDRESSES

IF A LOT HAS MULTIPLE OWNERS WITH DIFFERENT EMAIL ADDRESSES CAN THEY ALL HAVE SEPARATE PORTAL ACCESS?

- No. Currently access to the portal is only available using one lot owner's email address.
- This will be considered as part of future enhancements to the portal.

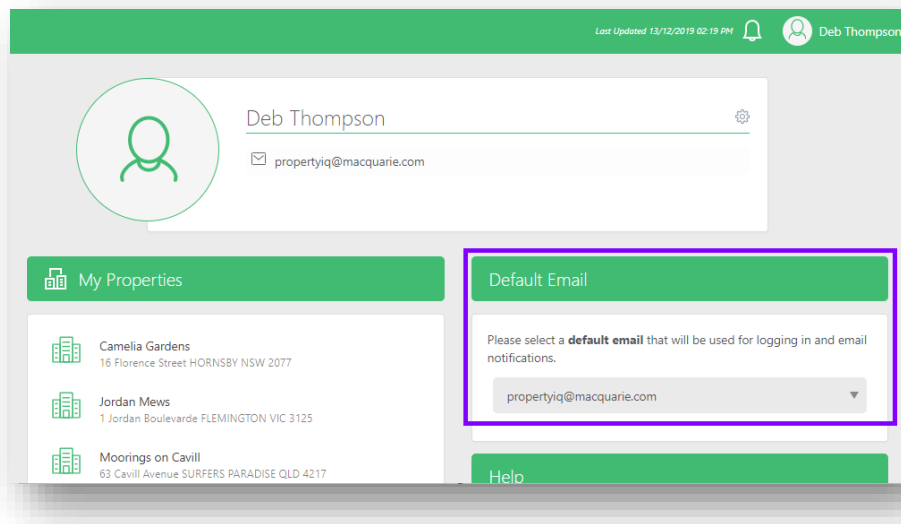
WHAT IF THERE ARE MULTIPLE EMAIL ADDRESSES IN THE EMAIL FIELD IN PROPERTYIQ?

- If there is more than one email address entered in the email field of the lot owner or committee/council 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

WHAT HAPPENS WHEN YOU UPDATE AN EMAIL ADDRESS FOR A LOT/MEMBER REGISTERED FOR THE PORTAL?

- Where there is one lot and one email address:
 - If the lot owner only owns one lot and you change the email address on their lot owner card
 - Their portal access will still remain active for the lot
 - Their username (email address) used to login to the portal will update to their new email address after the next sync
- Where there are two or more lots and one email address:
 - If you change the email address for all the lots owned by an owner
 - Their portal access will still remain active for **all** lots
 - Their username (email address) used to login to the portal will update to their new email address after the next sync.
- Where there are two or more lots and two or more email addresses:
 - If you change the email address on a lot owner card and that lot is one of multiple lots linked to one portal account
 - Their portal access will still remain active for **all** lots
 - The lot with the updated email address remains linked to the original portal account and the email address record is updated for that lot only.
 - Their username (email address) used to login to the portal remains the same as the original email

- The portal user will then have the option to set which email address is used as the default email for username & email notifications, under their portal Profile settings (PIQ Portal>Profile>Default Email)



IMPORTANT: Updating an email address in PROPERTYIQ will not remove the lot/member from a portal account. To remove the lot/member from a portal account, you must **deregister** the lot owner/member account in PropertyIQ. For full instructions, see the Portal Guide for Strata Managers.

WHAT IF A LOT OWNER/MEMBER WANTS TO USE A DIFFERENT EMAIL ADDRESS FOR THEIR PORTAL USERNAME?

- Update the lot owners/members email address in your PropertyIQ. Remember you will need to wait until the next portal sync has completed as this updates the email address in the portal.
- Refer to [‘What happens when you update an email address’](#) for detailed scenarios and instructions

PORTAL ACCOUNTS AND CHANGE OF OWNER

ONCE AN OWNER SELLS A PROPERTY, WILL THEY STILL HAVE ACCESS TO THE PORTAL?

- No. Once you’ve processed a *change of owner* in PropertyIQ, their access will be automatically disabled on the next sync.
- If they have other properties, their portal account will still remain active, but they’ll only be able to see information for the other properties they own.

WHAT HAPPENS WHEN YOU PROCESS A CHANGE OF OWNER FOR A LOT WITH PORTAL ACCESS?

- 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.

- 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 information about the lot they have sold no longer shows on their portal account.

PORTAL ACCOUNT PASSWORDS

TEMPORARY PASSWORD IN THE PORTAL INVITATION EMAIL

- The temporary password provided in the initial portal invitation email is **only valid for 24 hours**
- If the lot owner/member tries to use the temporary password after 24 hours, they will see a warning message on the portal login screen to say that it has expired
- The lot owner/member can click the *Forgot Password* link on the same login screen to be issued with a new invitation email, which contains a new temporary password
- The new temporary password must be used to continue setting up their account

WHAT ARE THE PASSWORD REQUIREMENTS THE PORTAL?

- There are minimum password requirements for portal passwords:
- A password must contain:
 - At least **8 characters**
 - An **uppercase** letter
 - A **lowercase** letter
 - A **number**
 - A **special character** from this set: ! @ # \$ % ^ & *
- For example: Abcdef1!

RESTRICTING PORTAL INFORMATION AND DOCUMENTS

HOW CAN I RESTRICT LEDGER INFORMATION TO THE CURRENT LOT OWNER'S OWNERSHIP PERIOD?

- Enter a last settled date (date the current owner took possession) on the lot owner card
- The last settled date will automatically be used to restrict the ledger and levy/fee information that's visible on the portal *Lots* page.

HOW CAN I RESTRICT DOCUMENTS TO THE CURRENT LOT OWNER'S OWNERSHIP PERIOD?

- Enter a last settled date (date the current owner took possession) on the lot owner card
- Your company's portal administrator can enable the setting 'show documents from lot's last settled date only' from the portal configuration page on the owner tab > document page settings

HOW CAN I RESTRICT DOCUMENTS TO A CURRENT COMMITTEE/COUNCIL MEMBERS APPOINTMENT DATE?

- The Committee/Council members appointment date on the committee member card can be used to restrict documents
- Your company's portal administrator can enable the setting 'show documents from committee/council members appointment date only' from the portal configuration page on the committee tab > document page settings

RESTRICTING LOT SPECIFIC DOCUMENTS IN THE PORTAL

- Documents generated and/or saved in PropertyIQ that are linked to a lot are only visible to that lot in the portal
- For documents generated by PropertyIQ, For example, due/fee notices, merge letters, meeting notices. The portal will automatically link the lot to the document
- If a document is not linked to a lot in PropertyIQ, it is considered a *global* (right across the building) document and shows on all portal accounts for that building
- For documents you manually enter and save into PropertyIQ from the document entry area, you will need to select a lot when saving it

The screenshot shows a document entry form with the following fields and values:

- Date: 05/12/2019
- Name: Document.pdf
- C.T.S.: 1 The Bachelor Pad 1- [icon]
- Schedule: [dropdown arrow]
- Lot: 98/98 Mr Smith [icon]
- Supplier: [icon]
- Document Type: Correspondence [dropdown arrow]
- Comments: [text area]

PORTAL DOCUMENTS

WHY ISN'T A DOCUMENT SHOWING IN THE PORTAL?

- For a document to show in the portal, it must be saved to a document type in PropertyIQ that has been enabled for auto-publishing to the portal
- Go to Utilities>Portal Control panel, select documents and check which document types you have enabled for auto publishing to the portal.
- Check the owner or committee auto publish options for that document type. For example, if a lot owner can't see the document, it might only be auto published to committee
- For detailed instructions on portal document settings see the Portal Guide for Strata Managers
- If the document is still not showing in the portal after you've checked these items, contact support@propertyiq.com.au for assistance

HOW DO I REMOVE A DOCUMENT FROM THE PORTAL?

- For a document to show in the portal, it must be saved to a document type in PropertyIQ that has been enabled for auto-publishing to the portal
- You can remove and restore a single document from portal under the portal settings of the specific document. For detailed instructions, view our Portal Guide for Strata Managers [here](#) and refer to section 'Remove and restore a single document auto-published to portal'.
- If you want to remove all documents of that document type from the portal, then you can delete the document type from the portal (this removes all documents of that type from the portal in the next sync)

HOW CAN I PUBLISH A DOCUMENT TO ALL OWNERS & COMMITTEE MEMBERS IN MY PORTFOLIO?

- You can publish a global document to all buildings and lot owners that have a portal account by using the *manual document publishing* feature. This is available to all clients using Portal.
- Follow these steps:
 1. Go to File > Documents > Document Entry screen.
 2. Upload and allocate your global document into PIQ by linking it to a Supplier (for example your managing agent supplier). *HINT:* You don't need to link a document to a building to save it.
 3. Click Save & Publish to Portal button.

4. Select the lot owners and committee members who need to view the document, add an optional expiry date, and click the *Publish* button.

DE-LINKING PORTAL ACCOUNTS

WHAT IF A BUILDING AND/OR LOT IS INCORRECTLY LINKED TO A PORTAL ACCOUNT?

- **Deregister** the lot/member from portal by going to PropertyIQ > Utilities > Portal Control Panel. For full instructions, see the Portal Guide for Strata Managers
- You then must wait until the next portal sync has completed, before re-registering that lot/member for portal using the correct details

IMPORTANT: Updating an email address in PROPERTYIQ will not remove the lot/member from a portal account. To remove the lot/member from a portal account, you must **deregister** the lot owner/member account in PropertyIQ. For full instructions, see the Portal Guide for Strata Managers

PORTAL ADMINISTRATOR

REQUIREMENTS FOR PORTAL ADMINISTRATOR ACCOUNT AND LOGIN

- 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
 - Your portal administrator access is different to a lot owners and requires a different email address (which becomes the username for your account)
 - For example if your portal administrator's email is janedoe@stratacompany.com.au this email address can't be in use for a committee/council member. Lots/members need to have another email address. For example, johnsmith@gmail.com. Be aware of this if any of your own team own lots in a building you manage and have their work email entered on their lot card.

WHAT IF I RECEIVE AN "INVALID EMAIL ADDRESS" ERROR WHEN TRYING TO LOG IN AS A PORTAL ADMINISTRATOR?

- If you have successfully logged into the portal with this email address previously, and now you see the error message "invalid email address", it usually means that the **same** email has been used for registering a lot owner or committee/council member for the portal. This will create issues for portal access and the account login.
 - In this case, please contact support@propertyiq.com.au or phone 1300 793 151
- If you have not logged into the portal with this email address previously, the email address entered may be incorrect. Please check, correct the email address and retry logging in

WHAT CAN A PORTAL ADMINISTRATOR SEE IN THE AUDIT TRAIL?

The below information is recorded and shown in the portal aAdministrator's account under the 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
- 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

NEED HELP?

Should your question not be listed above, please contact us on 1300 793 151 or support@propertyiq.com.au