



Portal guide for users

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GETTING STARTED

Your strata manager will send you an invitation to join the portal. Follow the steps to activate your portal account.

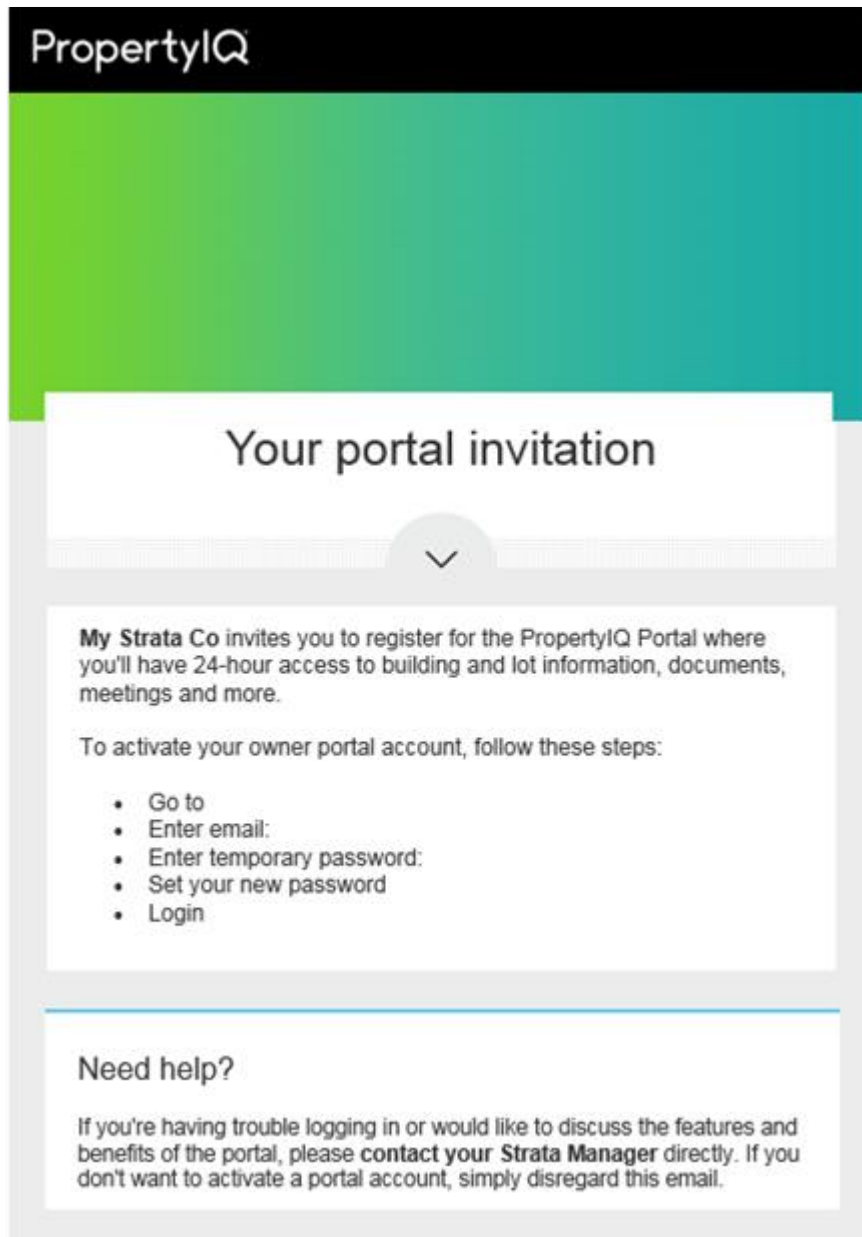
Please note that your strata manager may elect *not* to show all the information displayed in this guide on the portal. Your strata manager may also make different information available on the portal, depending on whether you are a member of the committee/council for your property.

LOT OWNER PORTAL ACCOUNTS

When your strata manager registers you for portal access, you will receive an email that looks something like this:

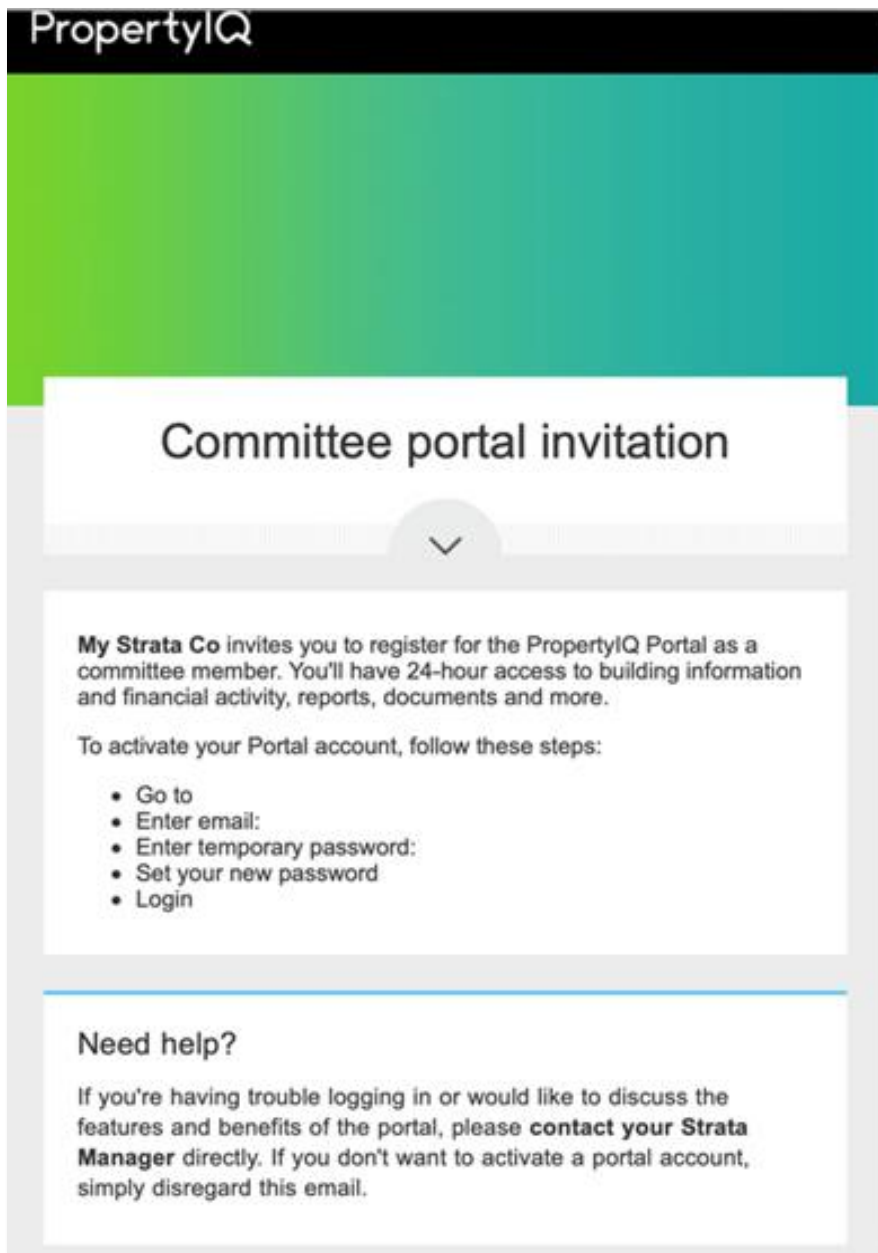
Click on the Go to link contained in the email to take you to the login page.

Follow the [First Login](#) steps below to get started.



Your portal invitation contains a link to the portal URL (address), your email address which is your username and a temporary password

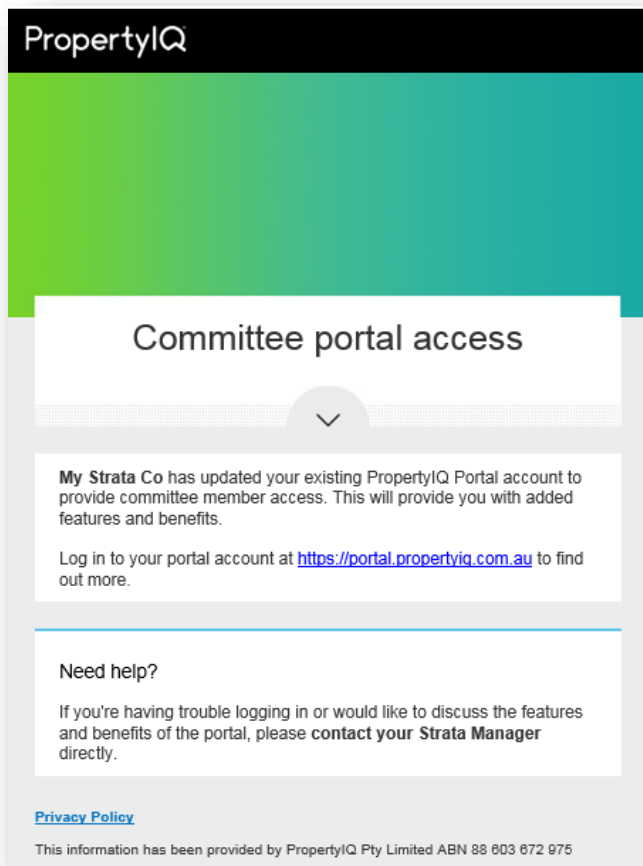
If you are not a lot owner but are a member of the committee/council for your building, you will receive an invitation to join the portal that looks something like this. Follow the [First Login](#) steps below to get started.



Your portal invitation contains a link to the portal URL (address), your email address which is your username and a temporary password

COMMITTEE/COUNCIL MEMBER PORTAL ACCOUNTS – LOT OWNER

If you are a lot owner, are a member of the committee/council for your property **and** you already have a portal account, your strata manager may add committee/council member permission to your portal account. Usually, additional information will show on your portal account if you are a member of the committee/council for your building. If you already have a portal account as a lot owner, you will receive an email that looks something like this. Click on the link to access your portal account.



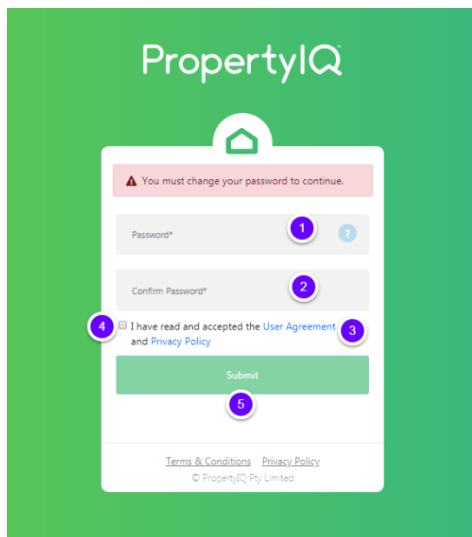
Once you have logged in to the portal you will see the additional information your strata manager has enabled for committee/council members to view.

FIRST LOGIN

The first time you log on you need to change your password and read and accept the *User Agreement* and *Privacy Policy*.

You will be taken to the PropertyIQ Portal website: <https://portal.propertyiq.com.au>

1. Enter your new password
2. Re-enter your password to confirm
3. Click here to read the User Agreement and Privacy Policy
4. Accept the User Agreement and Privacy Policy
5. *Submit*

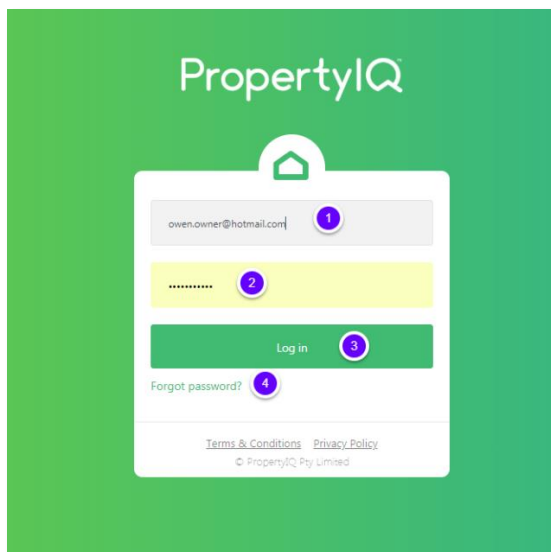


If you need any help getting your account up and running, you can contact your strata manager for assistance.

LOGGING IN

Go to the PropertyIQ Portal website: <https://portal.propertyiq.com.au>

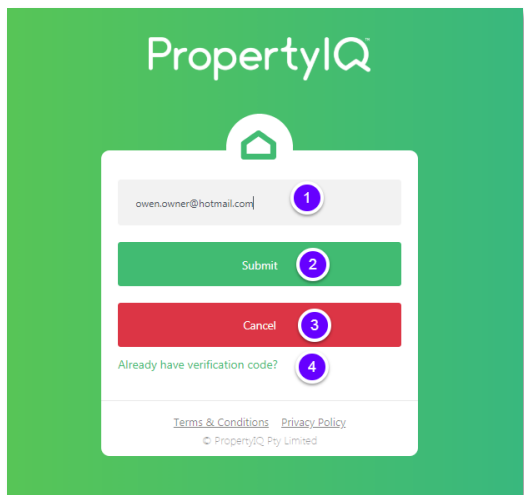
1. Enter your email address
2. Enter your password
3. Log in
4. *Forgot Password* takes you to the reset password screen



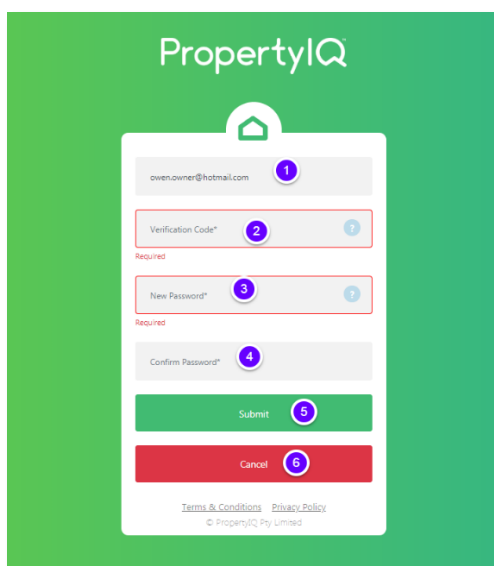
FORGOT YOUR PASSWORD?

Go to the PropertyIQ Portal website: <https://portal.propertyiq.com.au>. Click ***Forgot Password?*** Link.

1. Enter your email address
2. *Submit* to trigger an email containing a verification code
3. Cancel to exit
4. Once you receive your verification code, click here

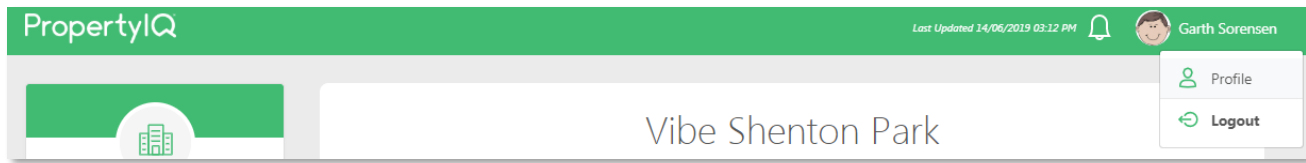


1. Enter your email address
2. Enter the verification code you received
3. Enter a new password
4. Re-enter the password to confirm
5. *Submit* when you are ready
6. *Cancel* to go back to the log in screen

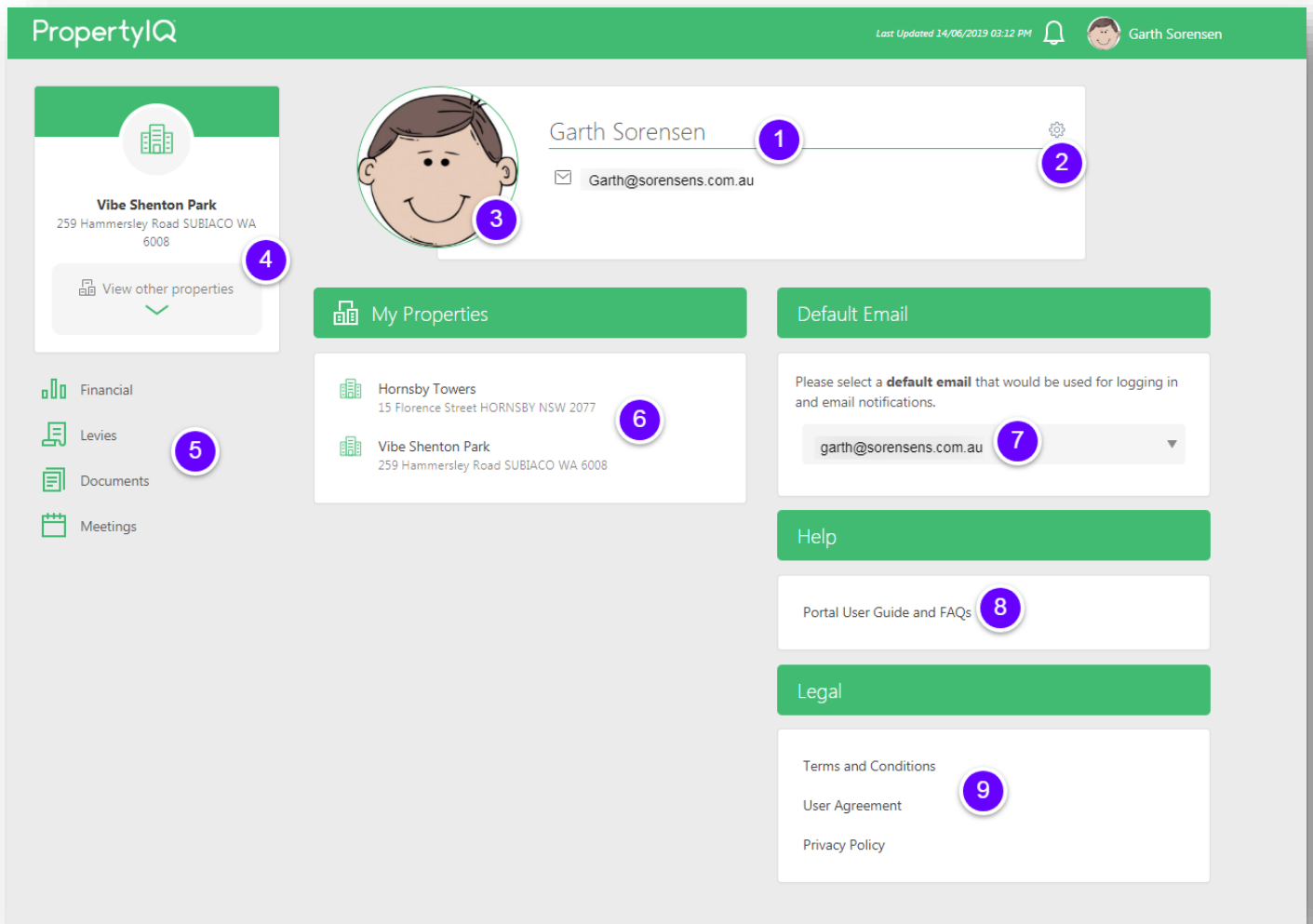


YOUR PROFILE

You can view your profile by clicking on your name and selecting *Profile*

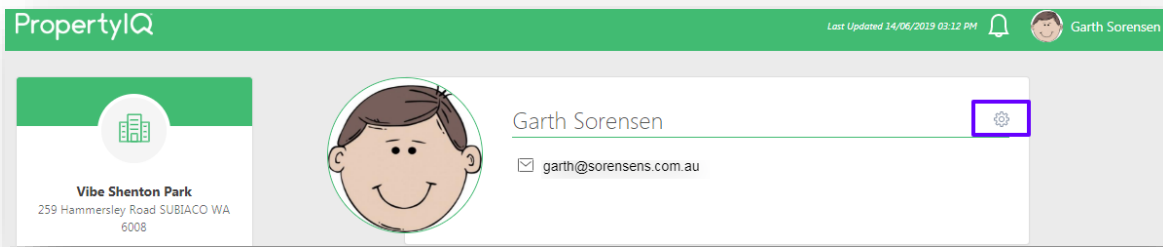


1. Your details as recorded by your strata manager show here
2. Access your settings here
3. You can upload a profile photo here by clicking on the pencil icon
4. You can click through to your properties here
5. You can access the financial reports, documents or meetings for the property that shows above here
6. Your properties can also be accessed here
7. If you have more than one email address recorded, you can choose the default email address to be used for logging in and email notifications here
8. Access the portal user guide and frequently asked questions here
9. Click here to view the terms and conditions, user agreement and privacy policy

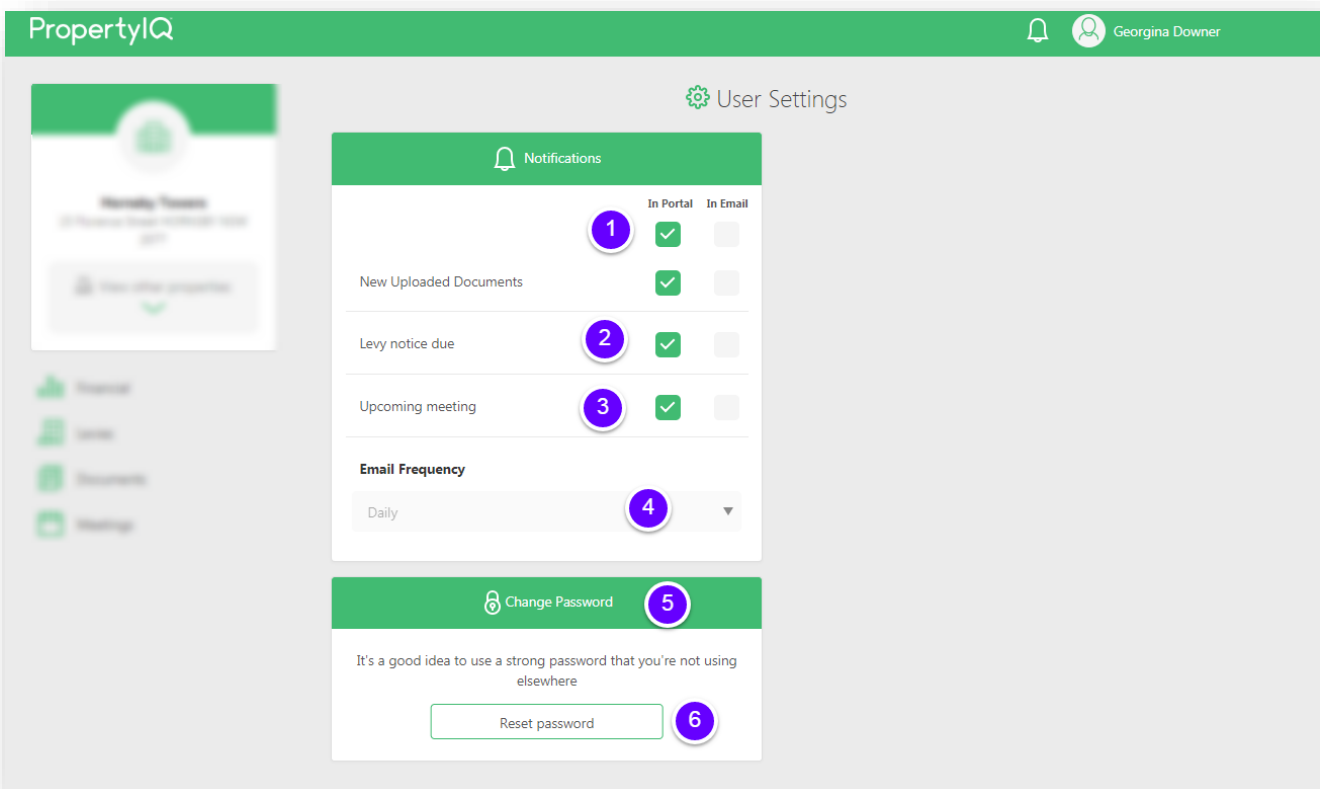


USER SETTINGS

Click on the settings icon to access your settings.

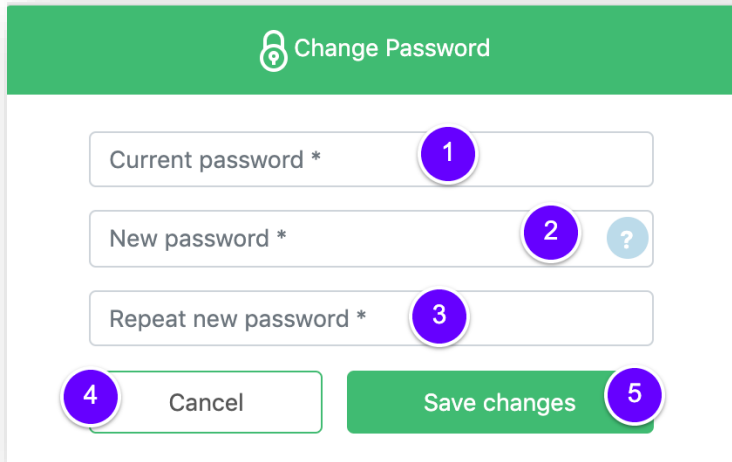


1. Choose whether you want to be emailed or whether you want to see a notification in the portal when your strata manager has sent new information to the portal
2. Choose whether you want to be emailed or see a notification in the portal when you have a levy notice due
3. Choose whether you want to be emailed or see a notification in the portal when you have an upcoming meeting
4. Choose your preferred email frequency here. Note:
 - o If you choose *Daily for Levy Notice Due* notifications the notification is sent 1 day prior to the levy due date.
 - o If you choose *Daily for Upcoming Meeting* the notification is sent 1 day prior to the meeting date.
 - o If you choose *Weekly* – known activity for the upcoming week is issued every Monday
 - o If you choose *Monthly* – known activity for the upcoming month is issued on the first day of the month
5. Change your password here
6. Select *Reset Password* to start the password reset process



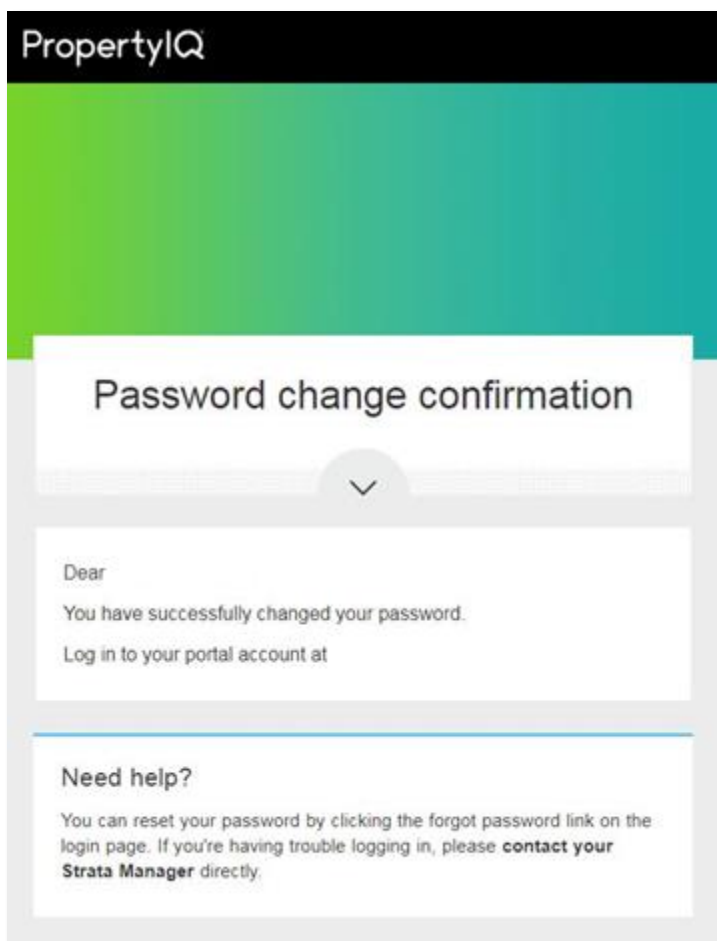
CHANGE YOUR PASSWORD

1. Enter your current password here
2. Enter your new password here
3. Repeat your new password here
4. *Cancel* to exit without saving your changes
5. *Save Changes*



The screenshot shows a 'Change Password' form with a green header. It contains three input fields: 'Current password *' (callout 1), 'New password *' (callout 2) with a toggle icon, and 'Repeat new password *' (callout 3). At the bottom, there are two buttons: 'Cancel' (callout 4) and 'Save changes' (callout 5).

You will receive an email confirming the change to your password.



VIEWING YOUR PROPERTY DETAILS

1. If you own lots in more than one property, you can select to view your other property details here
2. Select here to view detailed financials, levies, documents or meetings for your selected property
3. Property information for your selected property shows here
4. Insurance policy information for your selected property show here. Click on the arrow to view all details
5. Details of each lot you own in your selected property show here. Click on the arrow to view all details
6. Your strata manager's name shows here. Click on the arrow to view all details
7. The main contacts at your strata managing company show here if your Strata Manager has enabled this function. Click on the arrow to view the contact details of all main contacts at your strata managing company
8. If your selected property has an onsite manager their name shows here. Click on the arrow to view their contact details
9. If your selected property has a caretaker their name shows here. Click on the arrow to view their contact details
10. Details about the committee/council members for your selected property show here. Click on the arrow to view all committee/council member names.

The screenshot displays the PropertyIQ portal interface for a property named 'Southern Cross'. The header includes the PropertyIQ logo, the user's name 'Charlie Alexander', and a notification bell. The main content area is divided into several sections:

- Property Information:** A table listing details such as Strata Plan (777), Address (7 Livingstone Road SPRING HILL QLD 4000), Type (Residential), ABN, GST Registered (Yes), Number of Lots (5), Financial year start (01/07/2017), and Levy frequency (Quarterly).
- Insurance:** Shows the Insurer as CGU Insurance.
- My Lots:** Lists 'LOT #2'.
- Strata Manager:** Lists 'Ava Jean Balasta Manager'.
- Main Contacts:** Lists 'Main Contacts My Strata Co'.
- Onsite Manager:** Lists 'Phillipe Bandera'.
- Caretaker:** Lists 'Harrison Shelby'.
- Committee Members:** Lists 'Committee Members'.

Numbered callouts (1-10) are placed over various elements in the interface to correspond with the numbered list in the text above. Callout 1 is on the 'View other properties' link. Callout 2 is on the 'Financial' menu item. Callout 3 is on the 'Type' field. Callout 4 is on the 'Insurer' field. Callout 5 is on the 'LOT #2' field. Callout 6 is on the 'Ava Jean Balasta Manager' field. Callout 7 is on the 'Main Contacts My Strata Co' field. Callout 8 is on the 'Phillipe Bandera' field. Callout 9 is on the 'Harrison Shelby' field. Callout 10 is on the 'Committee Members' field.

PROPERTY DETAILS - BUILDINGS IN VICTORIA

If you are viewing a building located in Victoria **AND** the building has multiple Owners Corporations (OCs), you will see an additional dropdown option under the building name.

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

Based on your selection, it will display specific information related to the selected OC in the following areas:

- Property Information; ABN and GST status
- Committee Members

The screenshot displays the PropertyIQ interface for the 'Jordan Mews' property. At the top, the user is logged in as Franca Swand. The property name 'Jordan Mews' is shown with a dropdown menu currently set to 'OC1'. The interface is divided into several sections:

- Property Information:** A list of key details including Owner's Corporation (1008), Address (1 Jordan Boulevard FLEMINGTON VIC3125), Type (Residential), ABN, GST Registered (Yes), Number of Lots (6), Financial year start (01/04/2018), and Levy frequency (Quarterly).
- Strata Manager:** Shows the current manager, Ava Jean Balasta, and a list of Main Contacts, including 'My Strata Co uat'.
- Committee Members:** Lists the Chairperson, Ben James.

CONTACT YOUR STRATA MANAGER

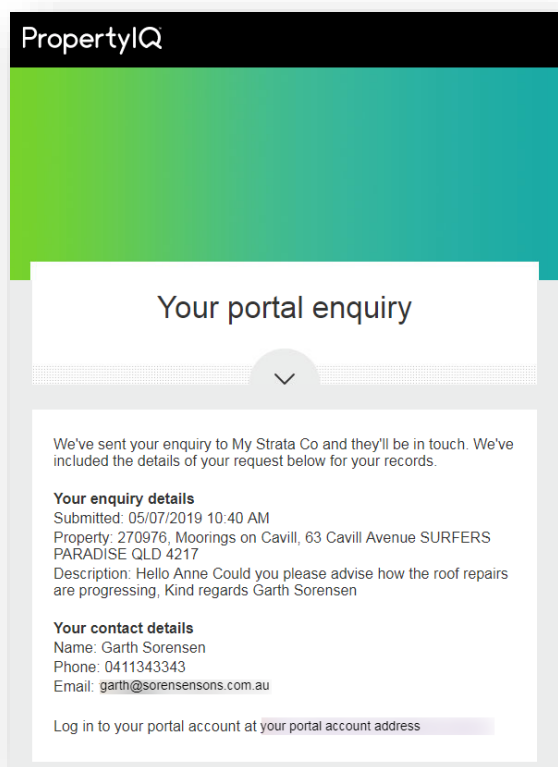
1. Click on the arrow beside your strata manager's name to open the details
2. **Contact**

The screenshot shows the PropertyIQ portal interface. At the top, the PropertyIQ logo is on the left, and the user's name 'Garth Sorensen' is on the right. The main heading is 'Moorings on Cavill'. Below this, there are two main sections: 'Property Information' and 'Strata Manager'. The 'Property Information' section lists details such as Strata Plan (270976), Address (63 Cavill Avenue SURFERS PARADISE QLD 4217), Type (Residential), ABN (123456789), GST Registered (No), Number of Lots (8), Financial year start (30/11/2017), and Levy frequency (Quarterly). The 'Strata Manager' section shows the manager's name 'Anne Fluva Manager' with a profile picture and a checkmark, and a 'Contact' button. Below this is the 'Main Contacts' section, which lists 'Main Contacts My Strata Co' with a left arrow.


1. Enter a phone number your strata manager can use to contact you
2. The email address you use to login to the portal shows here. You can enter an alternate email for contact here
3. Enter the body of your message
4. **Submit** to send the email to your strata manager

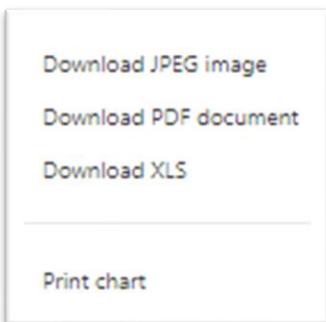
The screenshot shows the 'Contact Strata Manager' form in the PropertyIQ portal. The form is titled 'Contact Strata Manager' and has a 'Back' button. It contains several input fields: 'Name' (filled with 'Garth Sorensen'), 'Phone number' (filled with '0422545343'), and 'Email' (filled with 'garth@sorensens.com.au'). There is a 'Description' text area containing the text 'Would you please provide an update on the roof repairs.' and 'Kind regards, Garth'. At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

You will receive a confirmation that the email was sent to your strata manager.

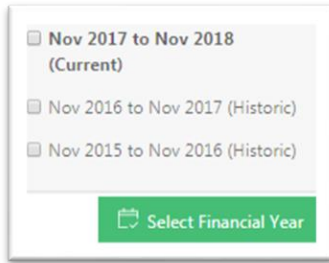



The screenshot shows the PropertyIQ Financial interface. At the top, the user is identified as Georgina Downer. The main dashboard for 'Mooring on Cavill' (63 Cavill Avenue SURFERS PARADISE QLD 4217) displays five summary cards: Admin Fund (\$63,423.28), Sinking Fund (\$20,458.33), Bank Balance (\$83,881.61), Investment Funds (\$0.00), and Arrears (\$54,841.52). A 'Request Detailed Financial Report' button is available. Below these are two charts: 'Bank Balances' (line chart showing Admin Fund, Bank Balance, Arrears, Sinking Fund, and Total Investments from Nov2017 to Nov2018) and 'Year on Year Performance' (bar chart comparing Admin Fund and Sinking Fund for Nov2016-Nov2017 and Nov2017-Nov2018). Both charts have a 'Select Financial Year' button. A sidebar on the left contains navigation links for Financial, Levies, Documents, and Meetings.

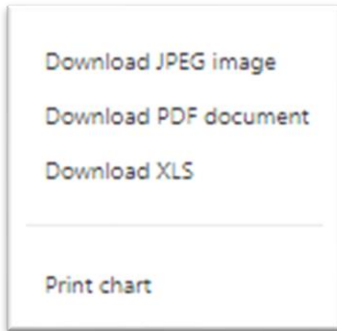
1. Your selected property shows here
2. You can switch the view to your other properties here
3. The financial tab is highlighted when viewing financials
4. The balance in the admin fund for your selected building shows here
5. The balance in the reserve/maintenance/sinking/capital works fund shows here
6. The total amount in your selected property's main bank account shows here
7. If your selected building has funds in an investment account, the balance shows here
8. The total amount of all arrears for your selected property shows here
9. You can request a financial report to be emailed to you by clicking here (see below for detailed instructions)
10. Bank balances show here. You can download by clicking on the  symbol. Select the format you want from the list.



11. Bank balances over time show here on the graph. Hover your mouse over the graph to see details
12. You can select to view the current financial year or previous financial years here



13. Year on year performance shows here. You can download by clicking on the  symbol. Select the format you want from the list.



14. Detailed year on year performance shows here. Hover your mouse over the graph to see details

15. You can select to view the current financial year or previous financial years here

FINANCIAL – BUILDINGS IN VICTORIA

If you are viewing a building located in Victoria **AND** the building has multiple Owners Corporations (OCs), you will see an additional dropdown option under the building name.

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

Based on your selection, it will display the financial information related to the selected OC only.

The screenshot displays the PropertyIQ Financial dashboard for the building 'Jordan Mews' (1 Jordan Boulevard FLEMINGTON VIC 3125). The user is Franca Swanden, and the data was last updated on 11/08/2020 at 02:04 AM. The dashboard features a sidebar with navigation options: Financial, Levies, Documents, and Meetings. The main content area is titled 'Financial' and includes a dropdown menu for selecting an Owners Corporation (OC), currently set to 'OC1'. Below this, five key financial metrics are displayed in cards: Admin Fund (\$301.20), Maintenance Fund (\$4,210.00), Bank Balance (\$4,511.20), Investment Funds (\$3,000.00), and Arrears (\$1,053,583.14). A 'Request Detailed Financial Report' button is also present. At the bottom, there are two charts: 'Bank Balances' (a line chart with a blue arrow pointing to the 750k mark) and 'Year on Year Performance' (a bar chart showing two green bars).

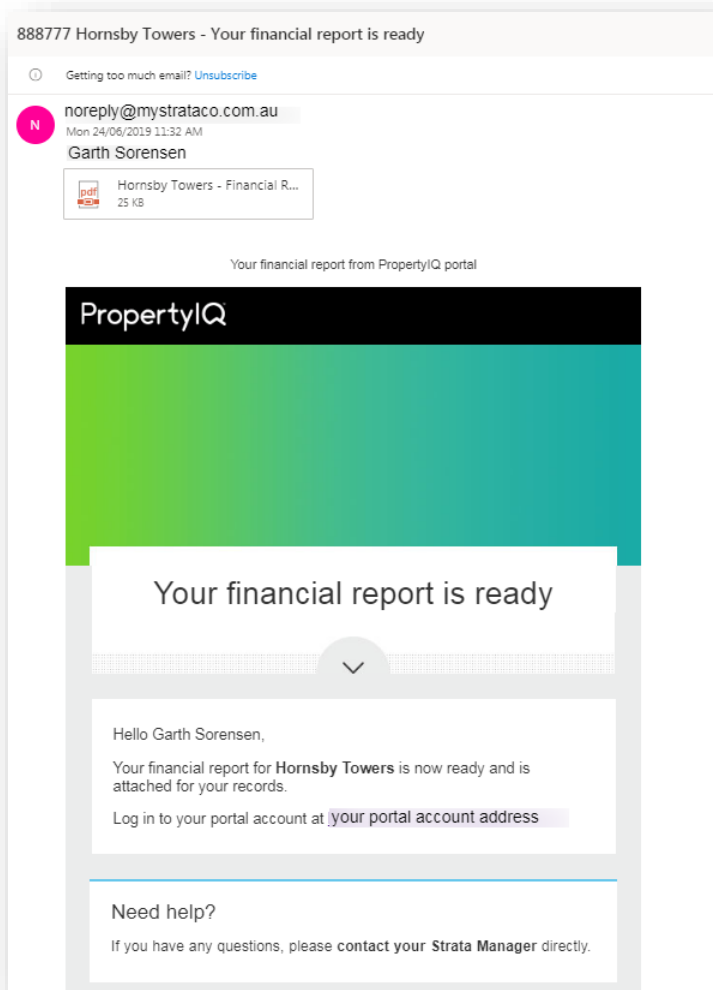
REQUEST FINANCIAL REPORTS

1. Choose which report you want to receive
2. Select a date range for your report
3. *Request* to generate a request for the reports to be emailed to you. Your requested reports will be emailed to you in PDF Format.

The screenshot shows a web form titled "Request Detailed Financial Report". It features several sections:

- Report Selection:** A grid of checkboxes for various reports. "Balance Sheet" and "Key Financial Information" are checked. "Income and Expenditure Statement", "Header Sheet", "Expenses and Other Income", and "Debtor Positions" are unchecked. A blue circle with the number "1" is positioned over the "Balance Sheet" checkbox.
- Date Range:** Two input fields labeled "From" and "To". The "From" field contains "01/01/2019" and the "To" field contains "01/06/2019". A blue circle with the number "2" is positioned over the "From" field.
- Action Buttons:** At the bottom right, there are two buttons: "Close" and "Request". A blue circle with the number "3" is positioned over the "Request" button.

The email you receive looks something like this:



REQUEST FINANCIAL REPORTS – BUILDINGS IN VICTORIA

If you are requesting a financial report for a building located in Victoria **AND** the building has multiple Owners Corporations (OCs), you will see an additional option on the request screen.

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

Based on your selection, you 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:

LEVIES/FEEES

1. Select the *Levies* option
2. A summary of any arrears owing and the next levy due shows here
3. Details of all levies show here. Use the slider to view older or newer levies
4. If you owe penalty interest, the breakdown of principal and interest owed show here
5. Select *Set Date Range* to open the calendar and view transactions for the selected date range. Select the dates and *Apply*

24/10/2018 19/11/2018

Oct 2018							Nov 2018						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6				1	2	3	
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31				25	26	27	28	29	30	1
							2	3	4	5	6	7	8

- Download statements to generate a statement in PDF format for the date range you selected above.
- You can pay your levies via DEFT by clicking *Pay with DEFT* to take you to the DEFT website

PropertyIQ Last Updated 22/07/2019 01:38 PM Charlie Alexander

Levies

Southern Cross
7 Livingstone Road SPRING HILL QLD 4000

View other properties

Arrears \$4,968.17 Overdue

Next Levy Due \$0.00

Pay with DEFT

LOT # 2
7 Livingstone Road SPRING HILL QLD

Set date range Download statement

Due date	Description	Amount	Balance
01/04/2018	Standard Levy Contribution Schedule From: 01/04/2018 To: 30/06/2018 Contribution Schedule	\$721.88	\$1,782.00
01/04/2018	Standard Levy Insurance From: 01/04/2018 To: 30/06/2018 Insurance	\$391.88	\$1,493.25
01/01/2018	Standard Levy Contribution Schedule From: 01/01/2018 To: 31/03/2018 Contribution Schedule	\$808.50	\$1,336.50
01/01/2018	Standard Levy Insurance From: 01/01/2018 To: 31/03/2018 Insurance	\$438.90	\$1,047.75

Balance + Interest **\$1,493.25**
\$3,474.92

Your downloaded statement looks something like this:

MY STRATA CO OWNER TRANSACTION SUMMARY from 24/10/18 to 28/11/18 All Schedules				Page 1
C.T.S.: 270976	Units: 8	Lots: 8		
Building Address: 63 Cavill Avenue				
Suburb: SURFERS PARADISE	State: QLD	Post Code: 4217		
Building Name: Moorings on Cavill	ABN: 123456789			
GST?: No	Manager: Anne Fluva			
Lot#: 1	Unit#: 1	Units of Entitlement: 20	Paid To: 31/12/16	
Owner Name: Rocco Silvester	Moorings Standard Contribution Schedule: 20		Arrears: \$11,144.48	
	Marina Maintenance: 20		Interest: \$54.45	
			Total Due: \$11,198.93 as at 28/11/18	

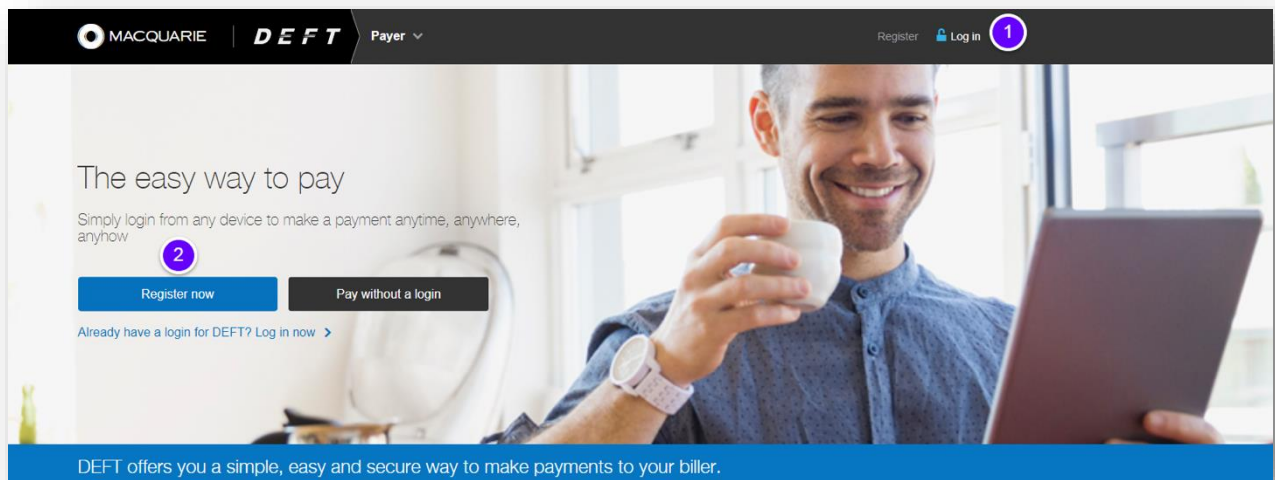
PAY WITH DEFT

The Pay with DEFT option takes you to the DEFT website. Here you can register for DEFT or pay without a login.

Once you are redirected to DEFT you can:

1. Login if you are already registered with DEFT
2. If you are not already registered with DEFT, you can register a new account
3. Once logged in you can
 - schedule recurring payments *or*
 - Make a single payment

Your Strata Manager may also enable the ability for you to allow direct debit of your levies/fees when they become due. If this has been enabled your strata manager will send you an invitation to set up direct debit.



NOTE If you need any help with DEFT registration and recurring direct debit, you can request help from DEFT by calling 1800 672 162 during business hours – details are shown on the DEFT website.

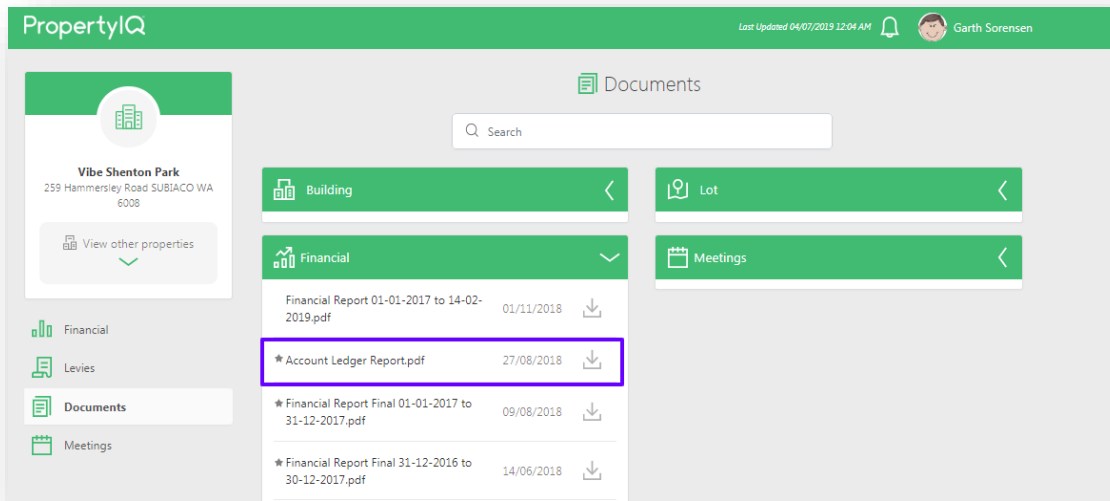
DOCUMENTS

The documents area shows all the documents relating to your property that your strata manager has sent to the portal.

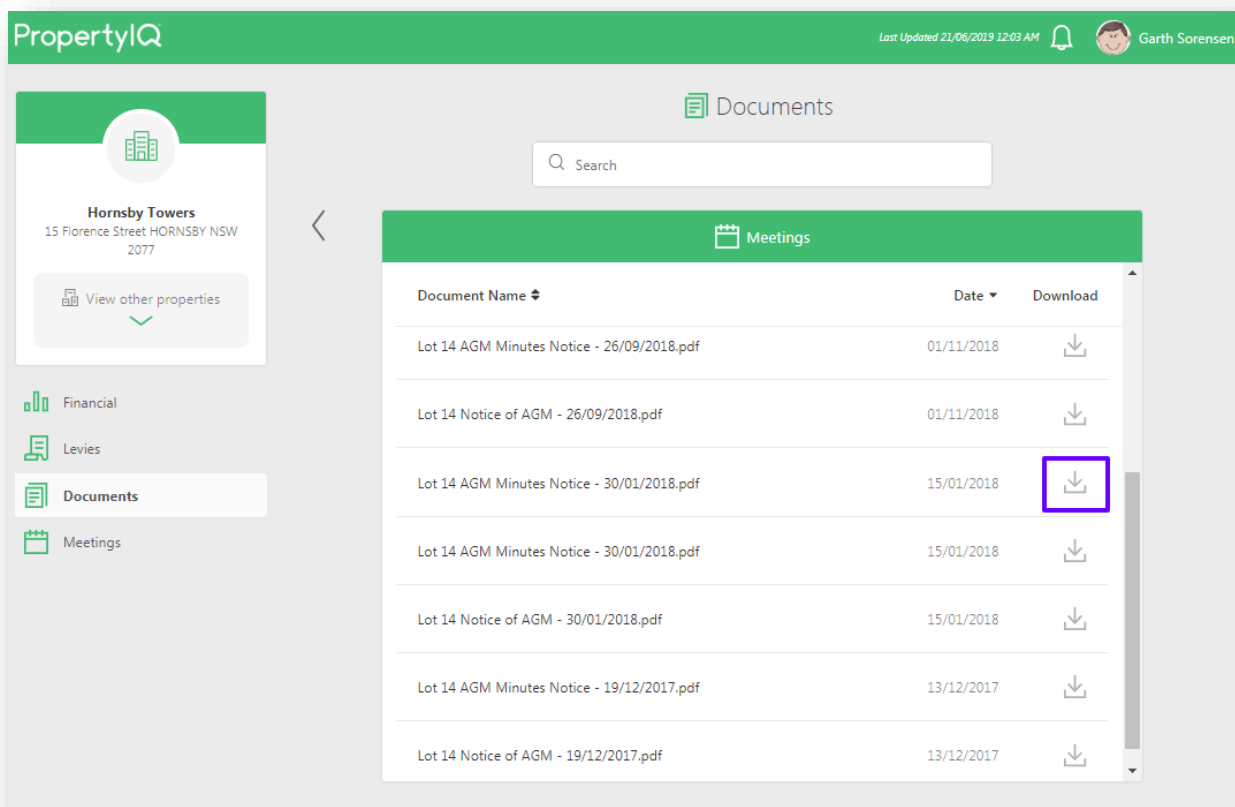
1. Select *Documents*
2. You can search all document names by entering some key words/letters here
3. Click on the green panels to open each document area
4. You can download a PDF copy of a document by clicking on this symbol
5. Only the latest four documents show here. You can view all documents your strata manager has sent to the portal in that category by clicking *Show more*

The screenshot shows the PropertyIQ portal interface. At the top, the header includes the PropertyIQ logo, the text 'Last Updated 19/06/2019 12:03 AM', a notification bell, and the user's name 'Garth Sorensen'. On the left sidebar, there are navigation options: 'Levies', 'Documents' (highlighted with a blue circle '1'), and 'Meetings'. The main content area is titled 'Documents' and features a search bar (callout '2'). Below the search bar are five category tabs: 'Building', 'Lot', 'Financial' (callout '3'), 'Meetings', and 'Insurance'. The 'Financial' tab is active, displaying a list of documents with columns for document name, date, and a download icon (callout '4'). The documents listed are: 'End of Year Reports - 2017-2018.pdf' (14/06/2019), 'Financial Report Final 01-09-2017 to 31-08-2018.pdf' (14/06/2019), 'Financial Report 01-09-2017 to 31-08-2018.pdf' (10/12/2018), and 'Financial Report 01-03-2018 to 31-08-2018.pdf' (10/12/2018). A 'Show more' link (callout '5') is visible at the bottom of the list. The 'Meetings' tab also shows a list of documents, including 'Lot 14 Notice of AGM - 17/02/2019.pdf' (16/02/2019) and 'Lot 14 Notice of SCM - 15/01/2019.pdf' (10/01/2019), with a 'Show more' link at the bottom.

If you have a committee/council member portal account, your strata manager may have made additional documents available for you to view. You can identify the additional documents by the star symbol beside them.



The *show more* option allows you to use the slider to view all the documents in that category. You can download a PDF copy of the document by selecting the download symbol.



MEETINGS

The meetings screen shows all the upcoming and previous meetings for your properties.

1. The meetings tab is highlighted when viewing meetings
2. Use the calendar to view upcoming meeting dates – you can use the arrows to switch your view to a different month or view today's meetings
3. Days that have a meeting show with a circle.
4. If you own more than one property, you can view the meeting details for all your properties by clicking here
5. The details of your next upcoming meeting show here. If your strata manager has issued the meeting notices, you can view the agenda here.
6. Click on the calendar icon to download a meeting invitation that you can add to your own calendar
7. You can view the meeting details from previous meetings by selecting the year from the dropdown list. Note that the amount of information available is determined by the period your strata manager has utilised PropertyIQ to process meetings.
8. Meetings for the current selected property show here. If your strata manager has issued the agenda or the minutes you can view them by clicking *View Minutes*

PropertyIQ Last Updated 05/07/2019 12:04 AM Garth Sorensen

Hornsby Towers
15 Florence Street HORNSBY NSW 2077

View other properties

Financial
Levies
Documents
Meetings

September 2019 Today

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Upcoming meetings

05 September 2019
Strata Committee Meeting
Hornsby Towers
3:00 PM to 4:30 PM
My Strata Offices NSW 13 Bourke Street SYDNEY NSW 2000

Agenda
Calendar

Previous meetings

2019

28 June 2019
Annual General Meeting
Moorings on Cavill
View Minutes

20 June 2019
Annual General Meeting
Moorings on Cavill
View Minutes

19 June 2019
Annual General Meeting
Vibe Shenton Park
View Minutes

I didn't receive the activation email my strata manager has sent

1. If your strata manager triggers an activation email during the day, you won't receive it until an overnight sync happens so check the next morning
2. Check your junk/trash emails
3. If you still haven't received your activation email, contact your strata manager

I submitted a password reset but did not receive an email to reset my password

1. Check your junk/trash emails
2. Try another password reset
3. If you still don't receive a password reset email, contact your strata manager, who will log a support ticket on your behalf

I'm having trouble setting my password

1. There are minimum password requirements for the PropertyIQ portal.
2. Your password must contain all of the following:
 - a. At least **8 characters**
 - b. An **uppercase** letter
 - c. A **lower case** letter
 - d. A **number**
 - e. A **special character** from this set: ! @ # \$ % ^ & *
3. *For example:* Abcdef1!

I can't remember my username

4. Your username is the email address recorded in PropertyIQ by your strata manager. If you own multiple lots and have different email addresses attached to each lot, try each of your email addresses in turn
5. Try a password re-set using your email address as the username. If you own multiple lots and have different email addresses attached to each lot, try each of your email addresses in turn
6. If you still can't log in, contact your strata manager, who will log a support ticket on your behalf

I know my username but when I try to log in, I receive a message "user does not exist"

If you only owned one property that is managed by your strata manager, and have recently sold that property, your strata manager will have processed a change of ownership, which disables your account. If you need information relating to your recently sold property, contact your strata manager.

I can't open the portal website

1. Check your internet connection
2. Check the address (URL) you are trying to access is correct
3. Check that your firewall settings are not blocking the portal. Consult your strata manager if you are unsure how to do this
4. Clear your browser cache and application storage data. Consult your strata manager if you are unsure how to do this.
5. If you still can't open the portal website, contact your strata manager

I can't see my property or lot in my portal account

1. If you own more than one property and have recently sold one of your properties your strata manager will have processed a change of ownership and you will no longer see that property on your portal account
2. If you have recently acquired a property it may take a little time for your strata manager to process a change of ownership and add the new property to your portal account. Contact your strata manager if you have any questions.
3. If you have owned your property for some time and it is not showing on your portal account, your strata manager may not have created a portal account for that property. Contact your strata manager for more details

I have requested a detailed financial report but have not received it

It may take a few hours for your detailed financial report to be emailed to you.

1. Check your junk/trash emails
2. Submit another financial reports request
3. If you still don't receive your detailed financial report, contact your strata manager

Need more help?

If you have any other questions, please contact your strata manager for assistance.