



Property IQ Portal

- USER GUIDE -



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.

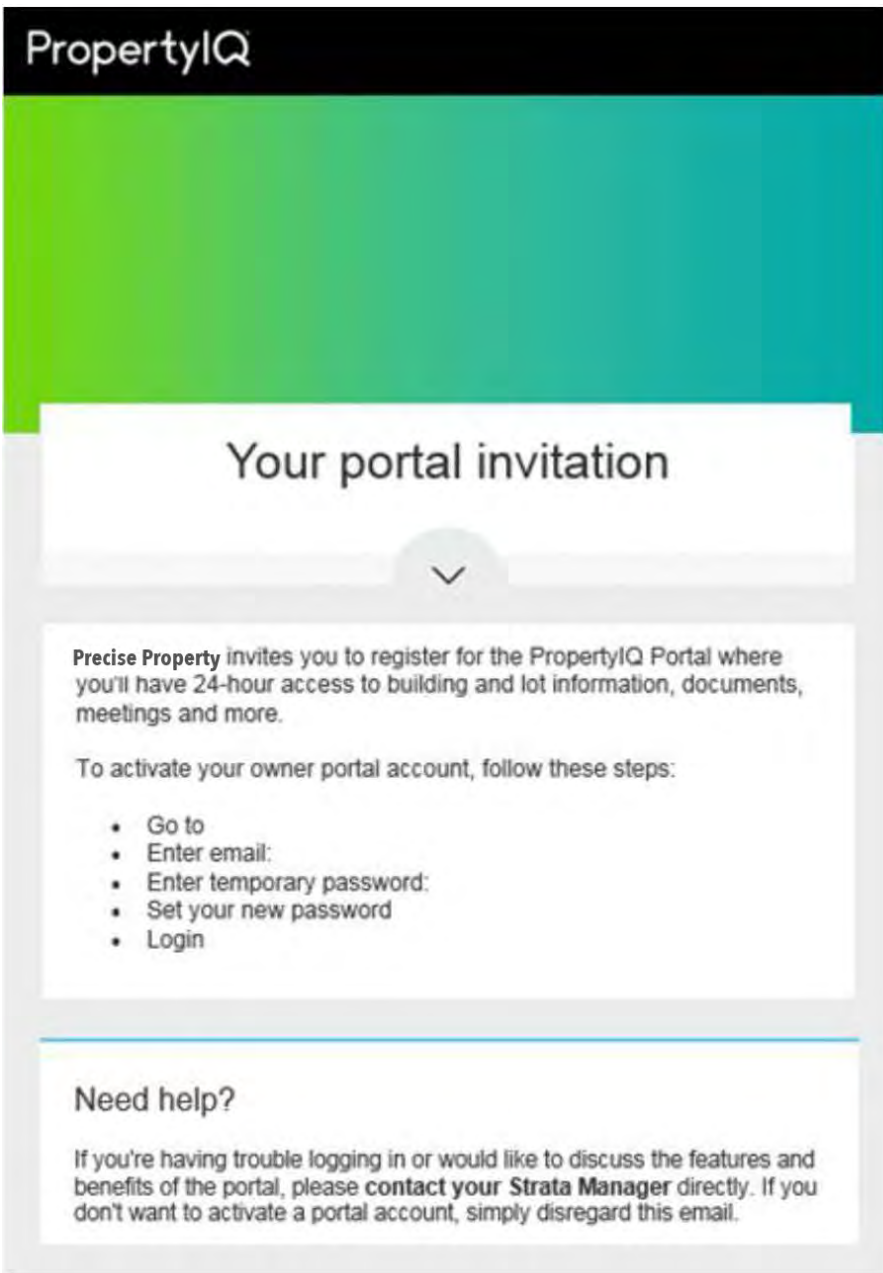
Please note that your strata manager may elect *not* to show all the information displayed in this guide on the portal. Your strata manager may also make different information available on the portal, depending on whether you are a member of the committee/council for your property.

LOT OWNER PORTAL ACCOUNTS

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

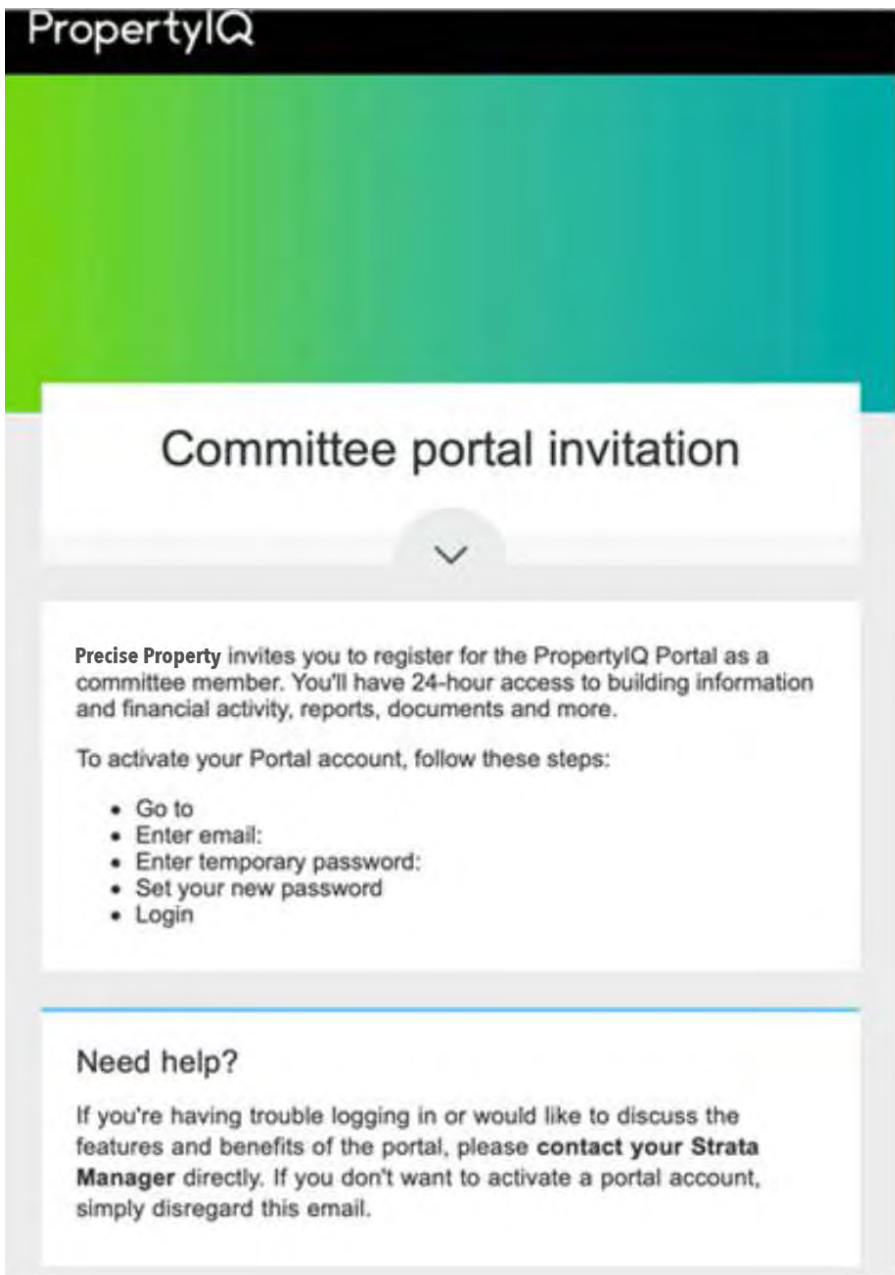
Click on the Go to link contained in the email to take you to the login page.

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

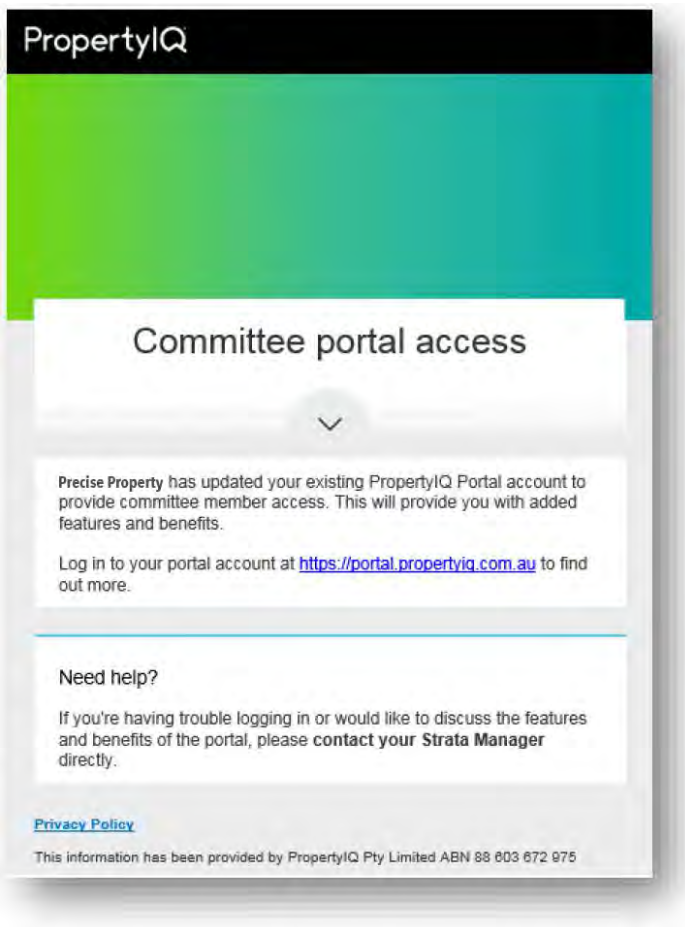
If you are not a lot owner but are a member of the committee/council for your building, you will receive an invitation to join the portal that looks something like this. Follow the [First Login](#) steps below to get started.



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.



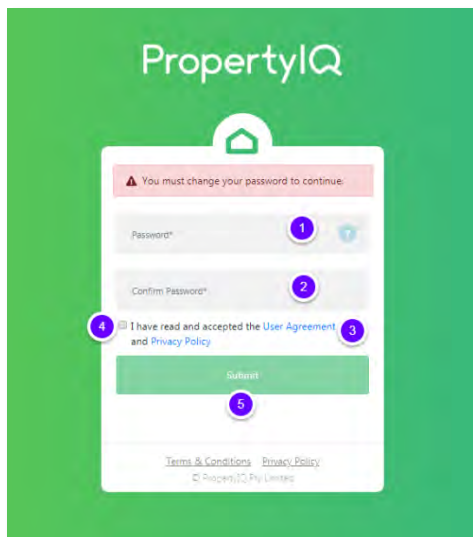
Once you have logged in to the portal you will see the additional information your strata manager has enabled for committee/council members to view.

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*

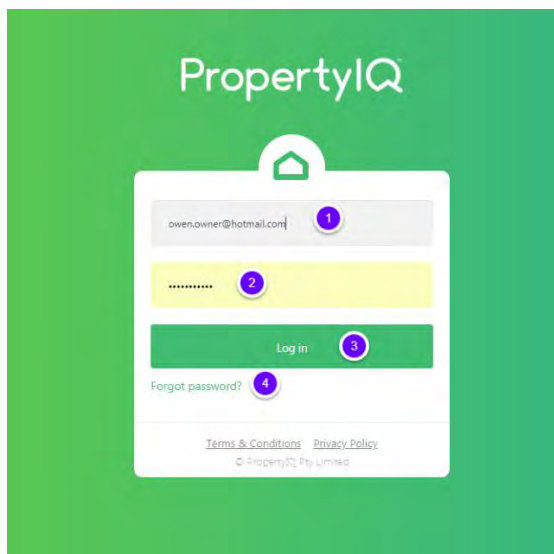


If you need any help getting your account up and running, you can contact your strata manager for assistance.

LOGGING IN

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

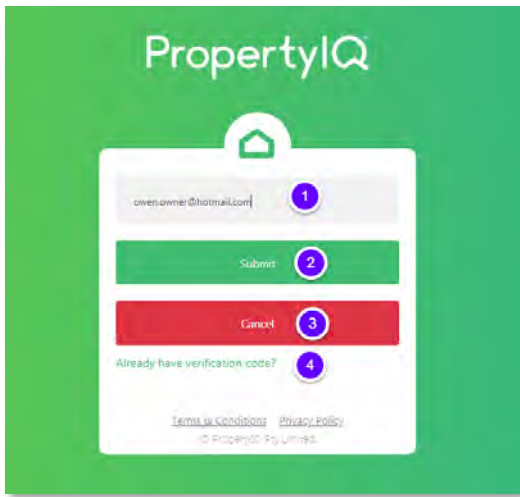
1. Enter your email address
2. Enter your password
3. Log in
4. *Forgot Password* takes you to the reset password screen



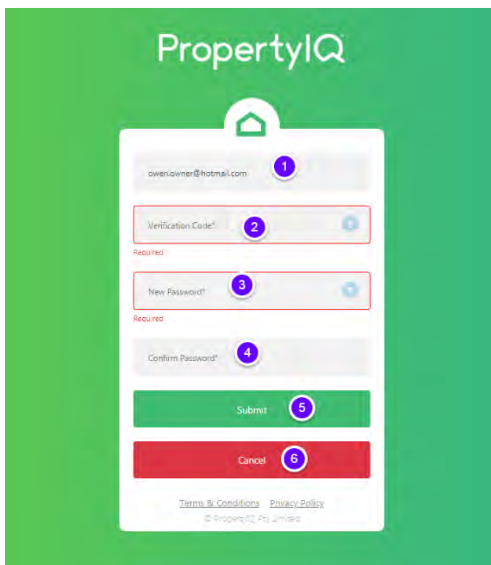
FORGOT YOUR PASSWORD?

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

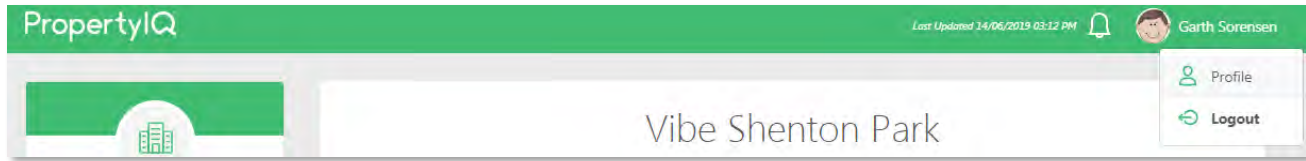


1. Enter your email address
2. Enter the verification code you received
3. Enter a new password
4. Re-enter the password to confirm
5. *Submit* when you are ready
6. *Cancel* to go back to the log in screen

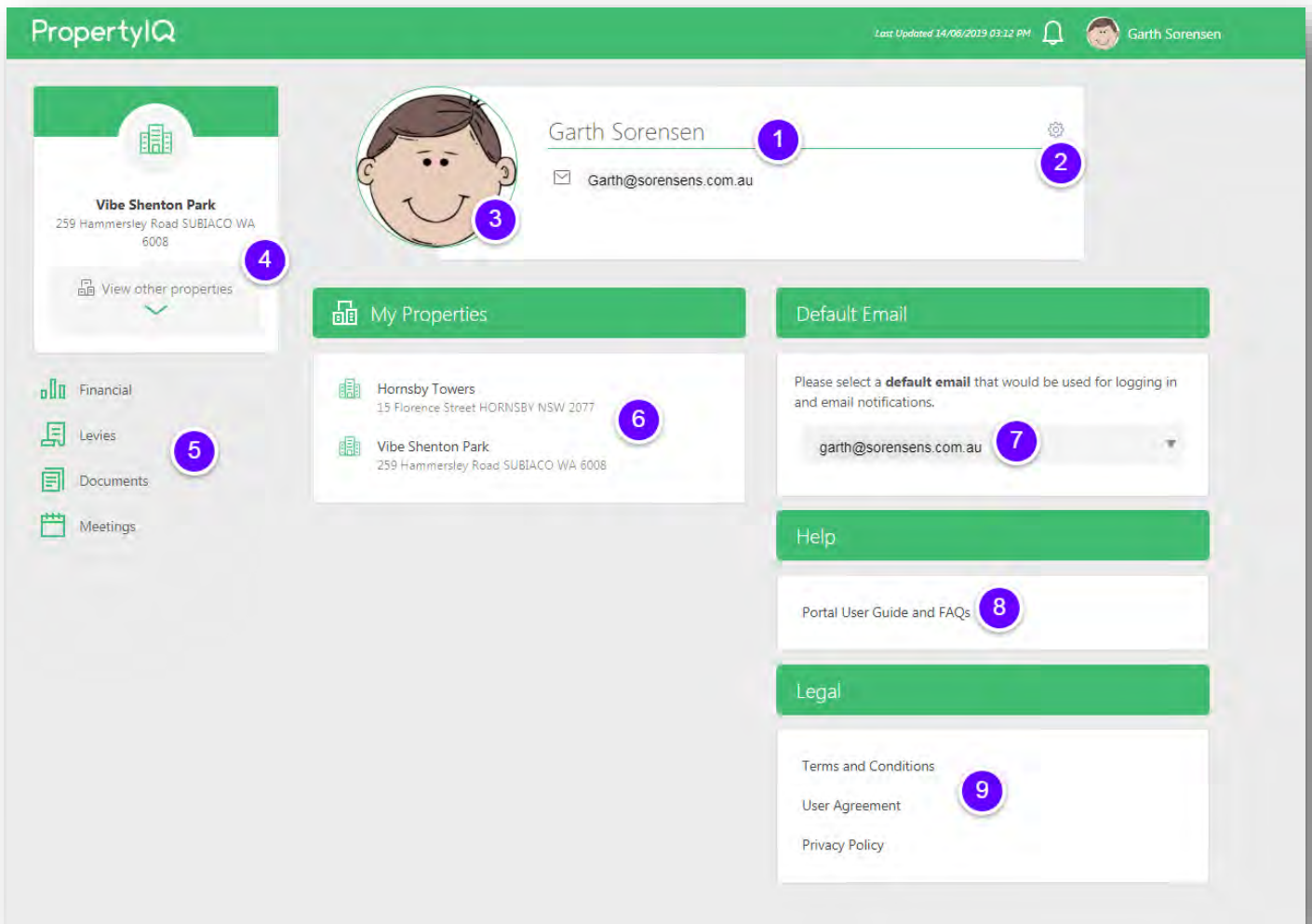


YOUR PROFILE

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

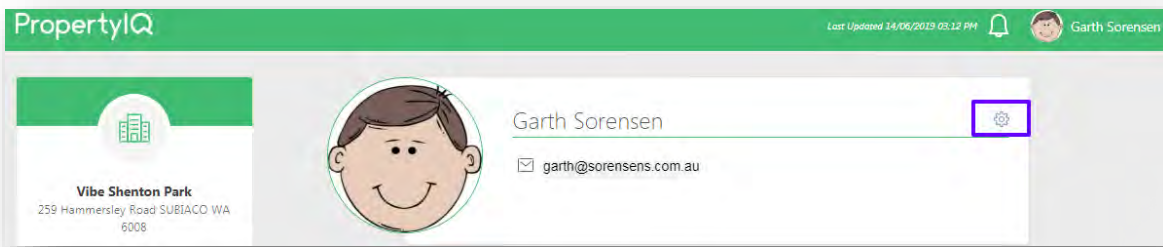


1. Your details as recorded by your strata manager show here
2. Access your settings here
3. You can upload a profile photo here by clicking on the pencil icon
4. You can click through to your properties here
5. You can access the financial reports, documents or meetings for the property that shows above 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

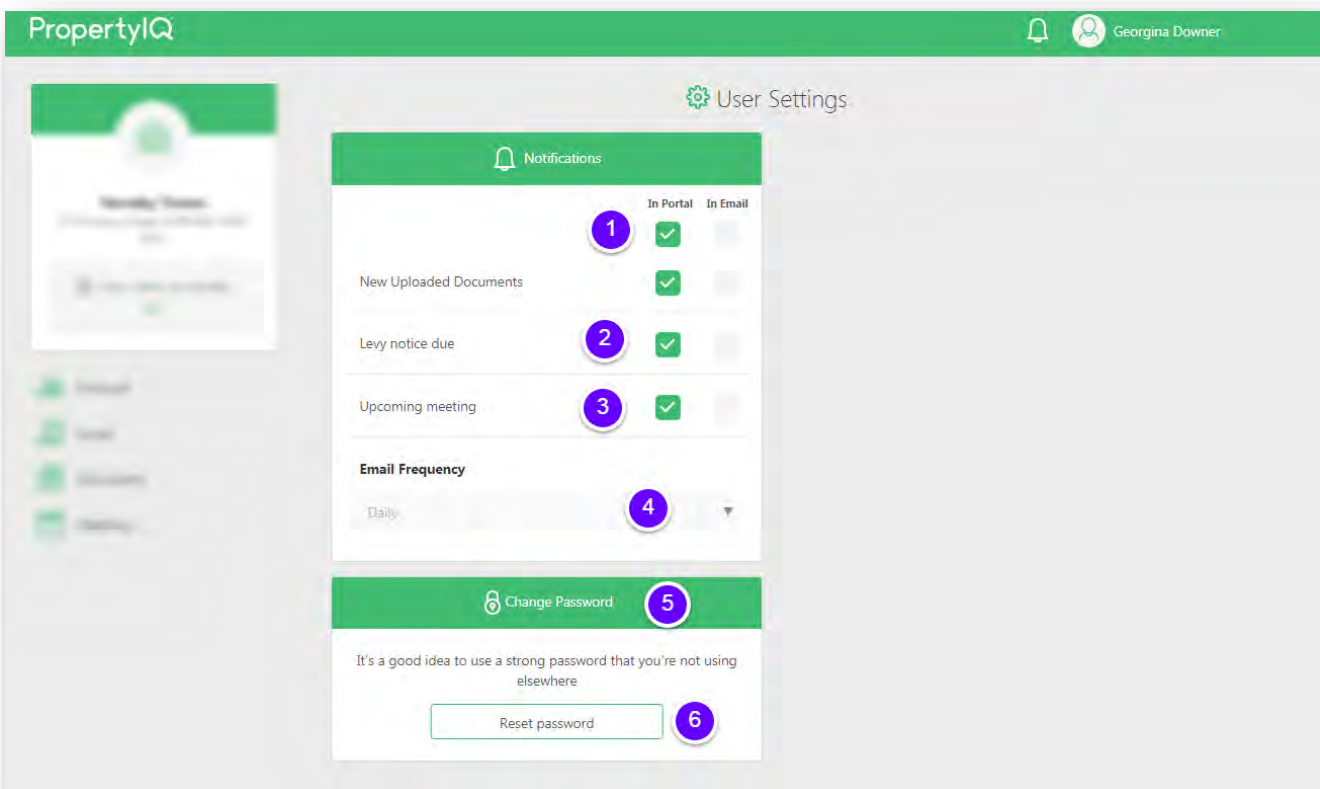


USER SETTINGS

Click on the settings icon to access your settings.

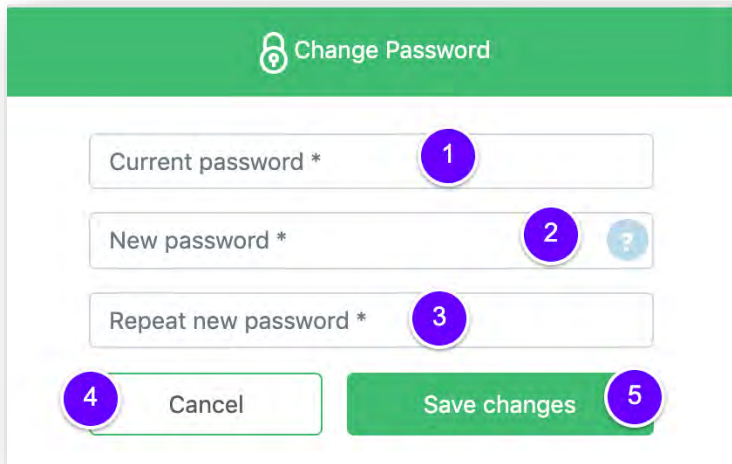


1. Choose whether you want to be emailed or whether you want to see a notification in the portal when your strata manager has sent new information to the portal
2. Choose whether you want to be emailed or see a notification in the portal when you have a levy notice due
3. Choose whether you want to be 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



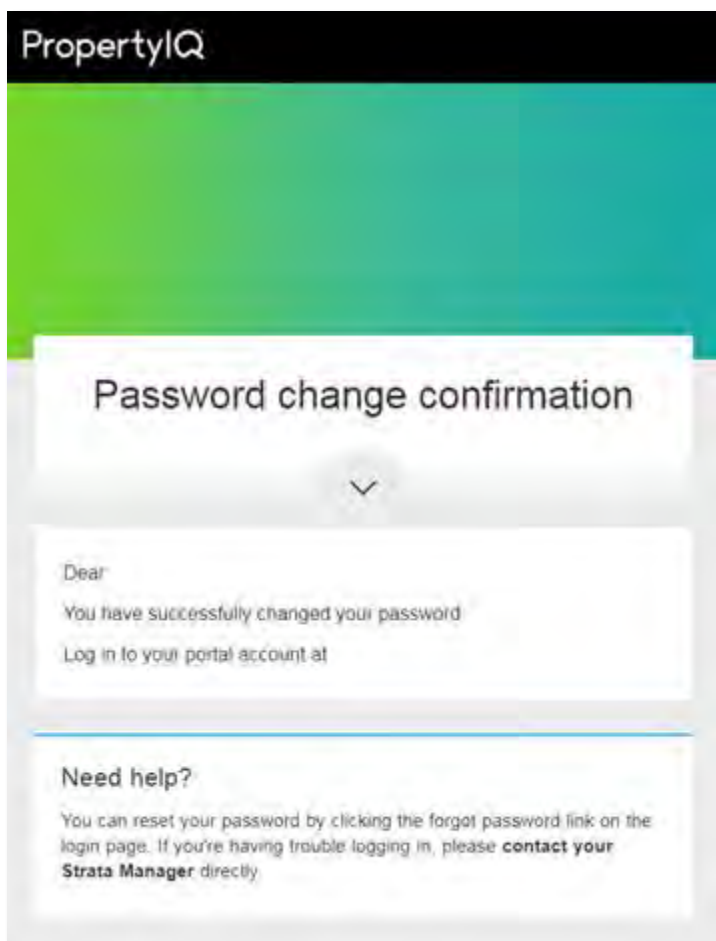
CHANGE YOUR PASSWORD

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, a notification bell, and the user's name 'Charlie Alexander'. The main content area is divided into several sections, each with a numbered callout:

- 1:** A card for 'Southern Cross' at '7 Livingstone Road SPRING HILL QLD 4000' with a 'View other properties' link.
- 2:** A sidebar menu with icons for 'Financial', 'Levies', 'Documents', and 'Meetings'.
- 3:** The 'Property Information' section, 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'.
- 4:** The 'Insurance' section, showing 'Insurer CGU Insurance'.
- 5:** The 'My Lots' section, showing 'LOT # 2'.
- 6:** The 'Strata Manager' section, showing 'Melissa Macpherson Manager'.
- 7:** The 'Main Contacts' section, showing 'Main Contacts Precise Property'.
- 8:** The 'Onsite Manager' section, showing 'Phillipe Bandera'.
- 9:** The 'Caretaker' section, showing 'Harrison Shelby'.
- 10:** The 'Committee Members' section, showing 'Committee Members'.

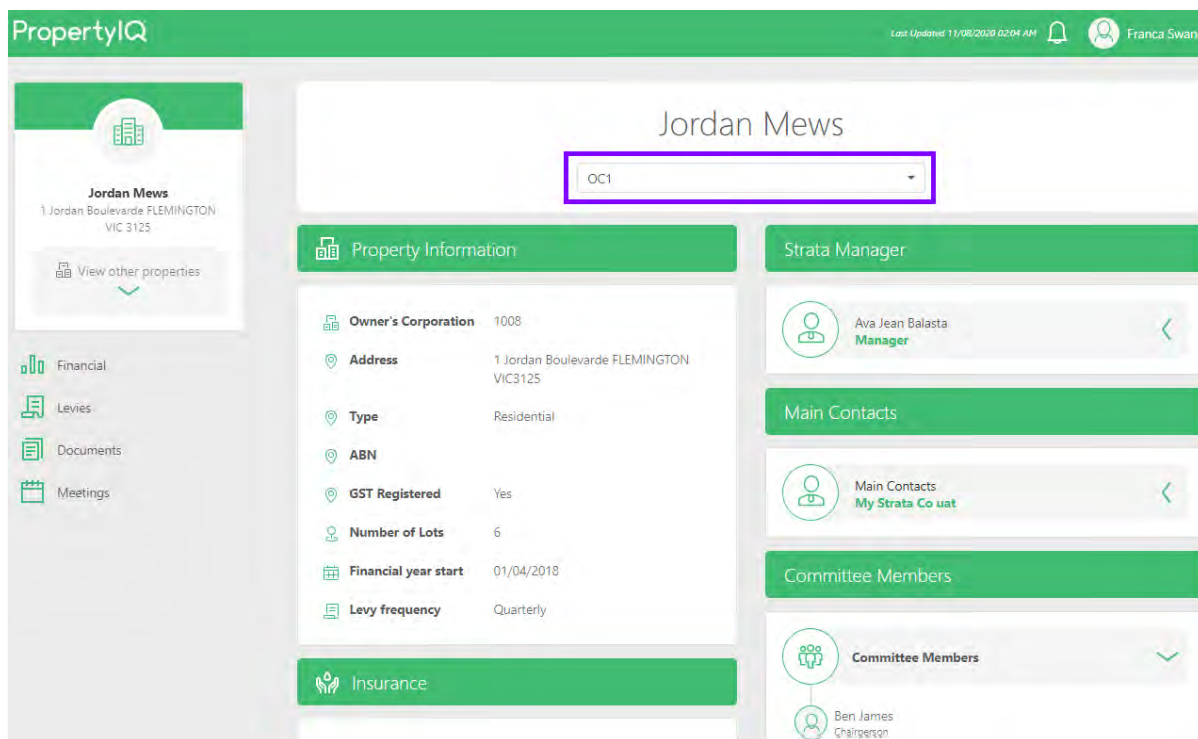
PROPERTY DETAILS - BUILDINGS IN VICTORIA

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 portal interface. At the top, the header shows the PropertyIQ logo, the text "Last Updated 11/08/2020 02:04 AM", a notification bell icon, and a user profile icon for Franca Swandi. The main content area is titled "Jordan Mews" and features a dropdown menu with "OC1" selected. Below this, the interface is divided into several sections:

- Property Information:** A table listing details for the selected OC1:

| | |
|----------------------|---------------------------------------|
| 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 |
| Levy frequency | Quarterly |
- Strata Manager:** A section showing the Strata Manager, Ava Jean Balasta.
- Main Contacts:** A section showing Main Contacts, My Strata Co-ordinator.
- Committee Members:** A section showing Committee Members, including Ben James, Chairperson.

On the left side, there is a sidebar with a navigation menu including Financial, Levies, Documents, and Meetings. Below the main content, there is an "Insurance" section.

CONTACT YOUR STRATA MANAGER

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

PropertyIQ Last Updated 17/06/2019 12:05 AM Garth Sorensen

Moorings on Cavill

63 Cavill Avenue SURFERS PARADISE QLD 4217

View other properties

- Financial
- Levies
- Documents
- Meetings

Property Information

| | |
|----------------------|--|
| 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 |
| Levy frequency | Quarterly |

Strata Manager

Jarrod Ling
Manager

Company: Precise Property
Address: 48/117 Old Pittwater Road Brookvale NSW 2100
Phone: 0414 972 132
Email: Jarrod@precise.property

Contact

Main Contacts

Main Contacts
Precise Property

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

PropertyIQ Last Updated 17/06/2019 12:05 AM Garth Sorensen

Moorings on Cavill

63 Cavill Avenue SURFERS PARADISE QLD 4217

View other properties

- Financial
- Levies
- Documents
- Meetings

Contact Strata Manager

Back

Name: Garth Sorensen

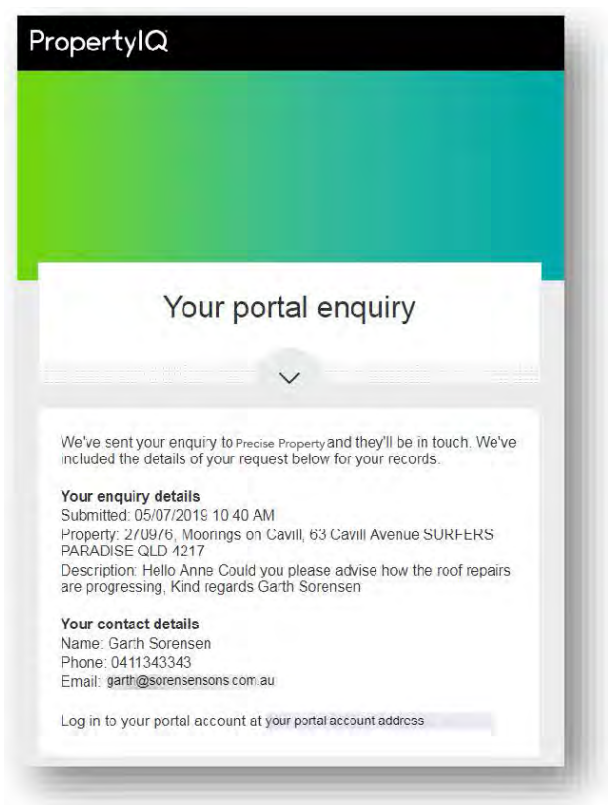
Phone number: 0422545343

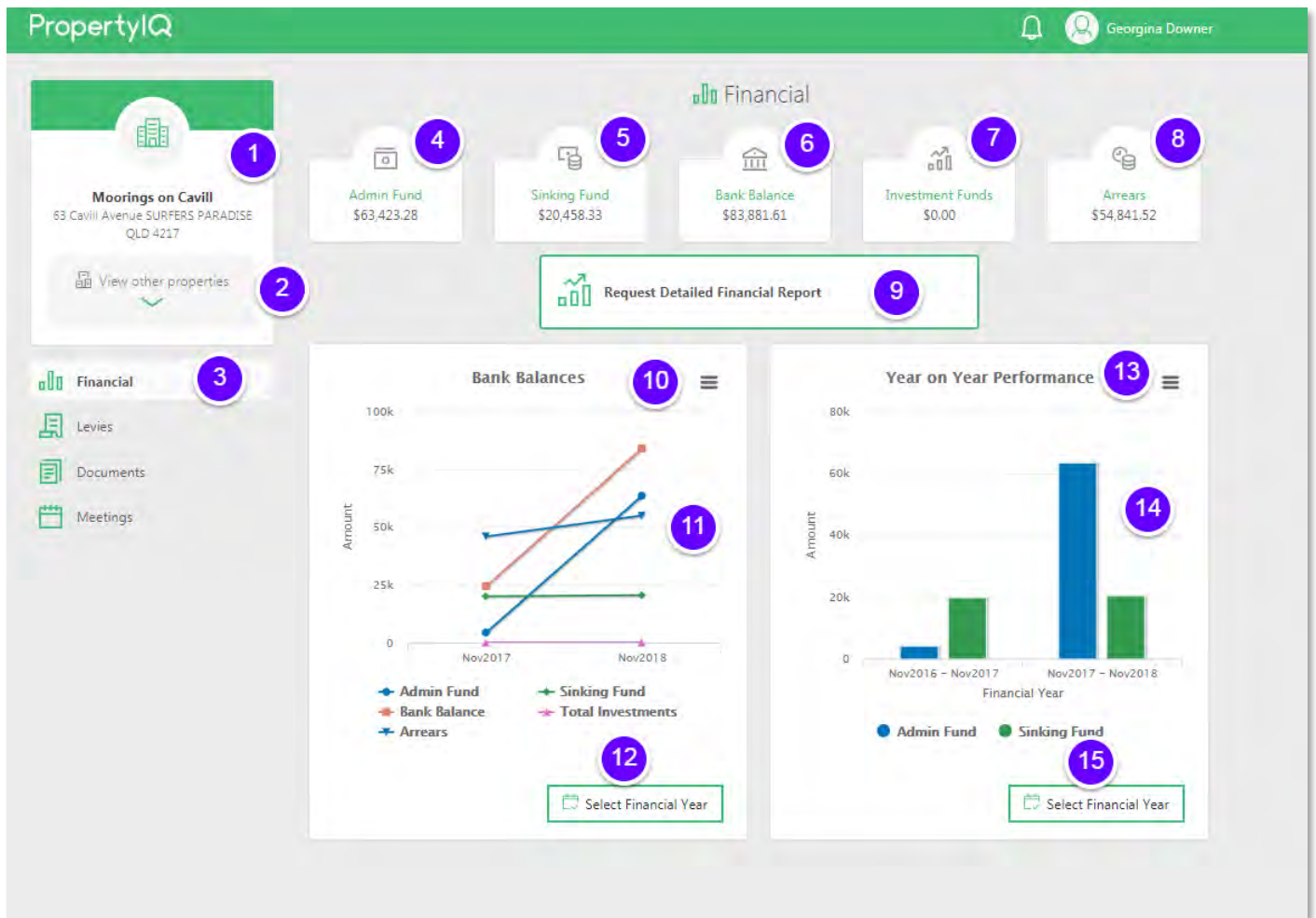
Email: garth@sorensens.com.au

Description: Would you please provide an update on the roof repairs.
Kind regards,
Garth

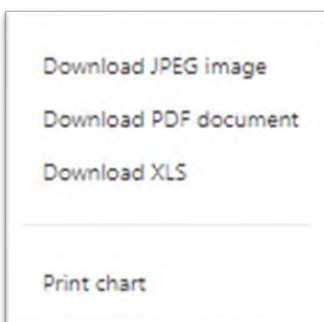
Submit Cancel

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

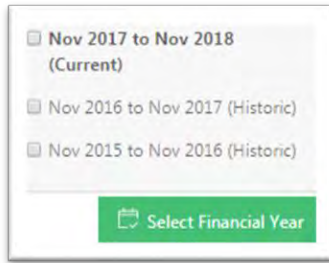





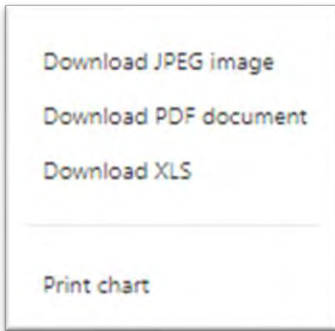
1. Your selected property shows here
2. You can switch the view to your other properties here
3. The financial tab is highlighted when viewing financials
4. The balance in the admin fund for your selected building shows here
5. The balance in the reserve/maintenance/sinking/capital works fund shows here
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 logged in as Franca Swanden. The dashboard features a dropdown menu for selecting an Owners Corporation (OC), currently set to OC1. Below this, five summary cards provide financial data: 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 visible. At the bottom, there are two charts: 'Bank Balances' showing a line graph with a blue arrow pointing upwards, and 'Year on Year Performance' showing a bar chart with 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.

Request Detailed Financial Report

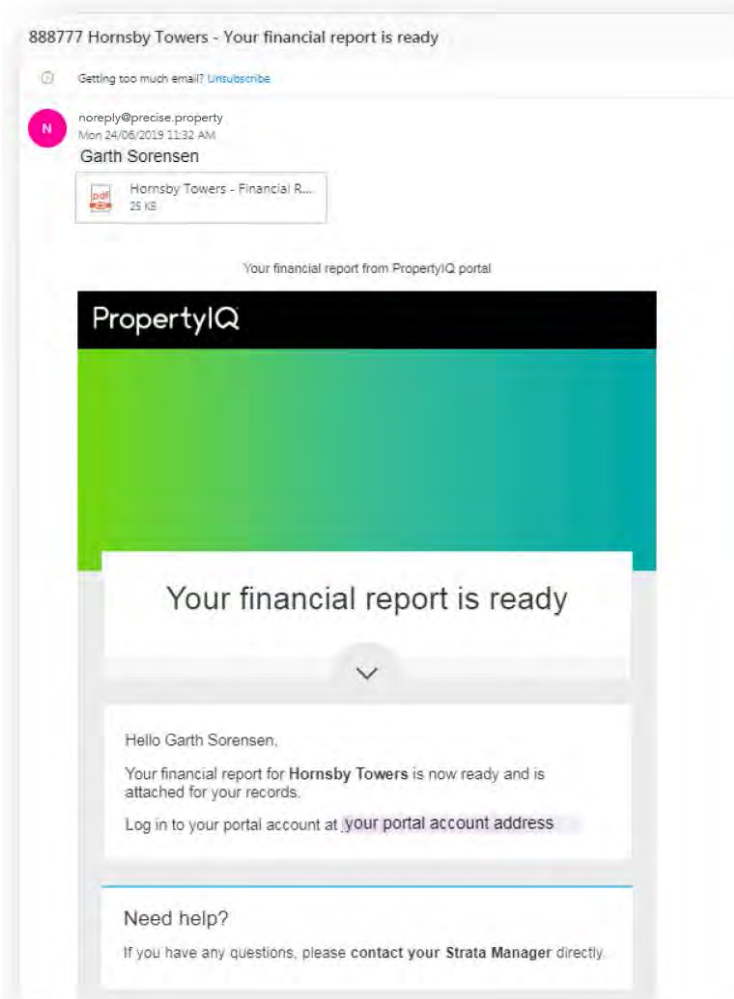
Balance Sheet Income and Expenditure Statement

Header Sheet Expenses and Other Income

Key Financial Information Debtor Positions

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

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 |
| 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 |

- 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

Financial
Levies
Documents
Meetings

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 \$1,493.25
- Interest \$3,474.92

Your downloaded statement looks something like this:

| PRECISE PROPERTY | | | |
|---|----------|---|---------------------------------------|
| OWNER TRANSACTION SUMMARY from 24/10/18 to 28/11/18 | | | |
| All Schedules | | | |
| C.T.S.: 270976 | | Units: 8 | Lots: 8 |
| Building Address: 63 Cavill Avenue | | | |
| Suburb: SURFERS PARADISE | | | |
| Building Name: Moorings on Cavill | | State: QLD | Post Code: 4217 |
| GST?: No | | ABN: 123456789 | 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 |

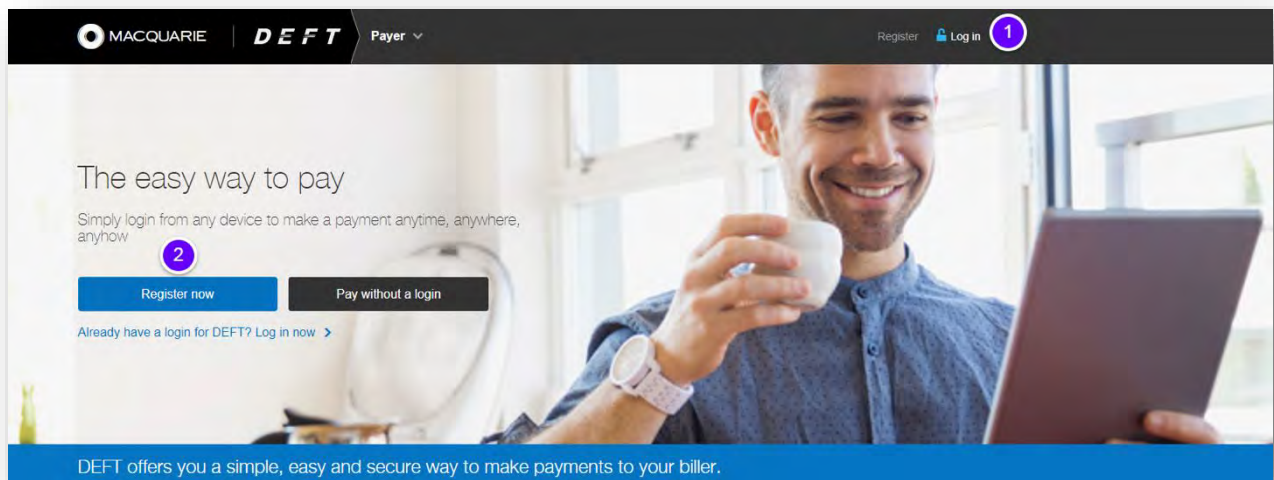
PAY WITH DEFT

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.

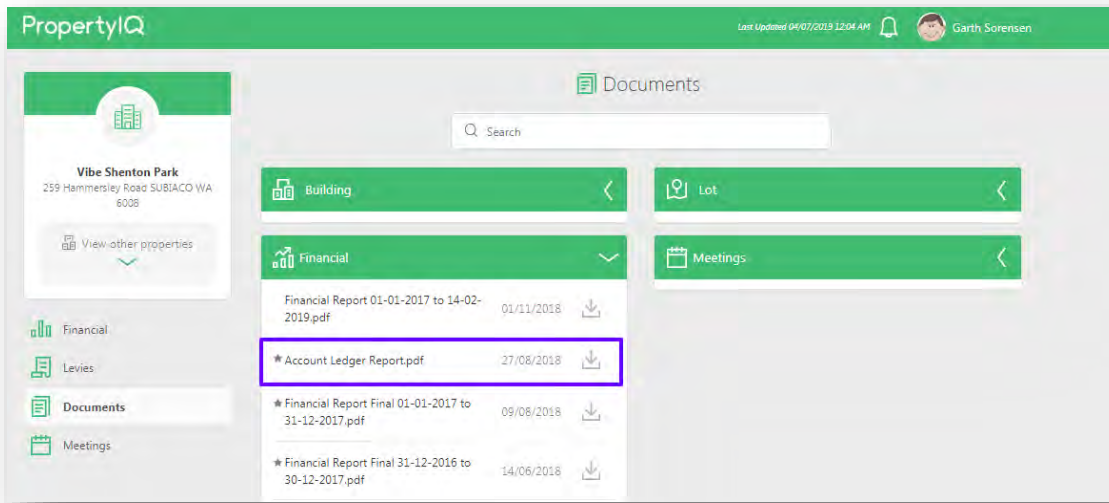
DOCUMENTS

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

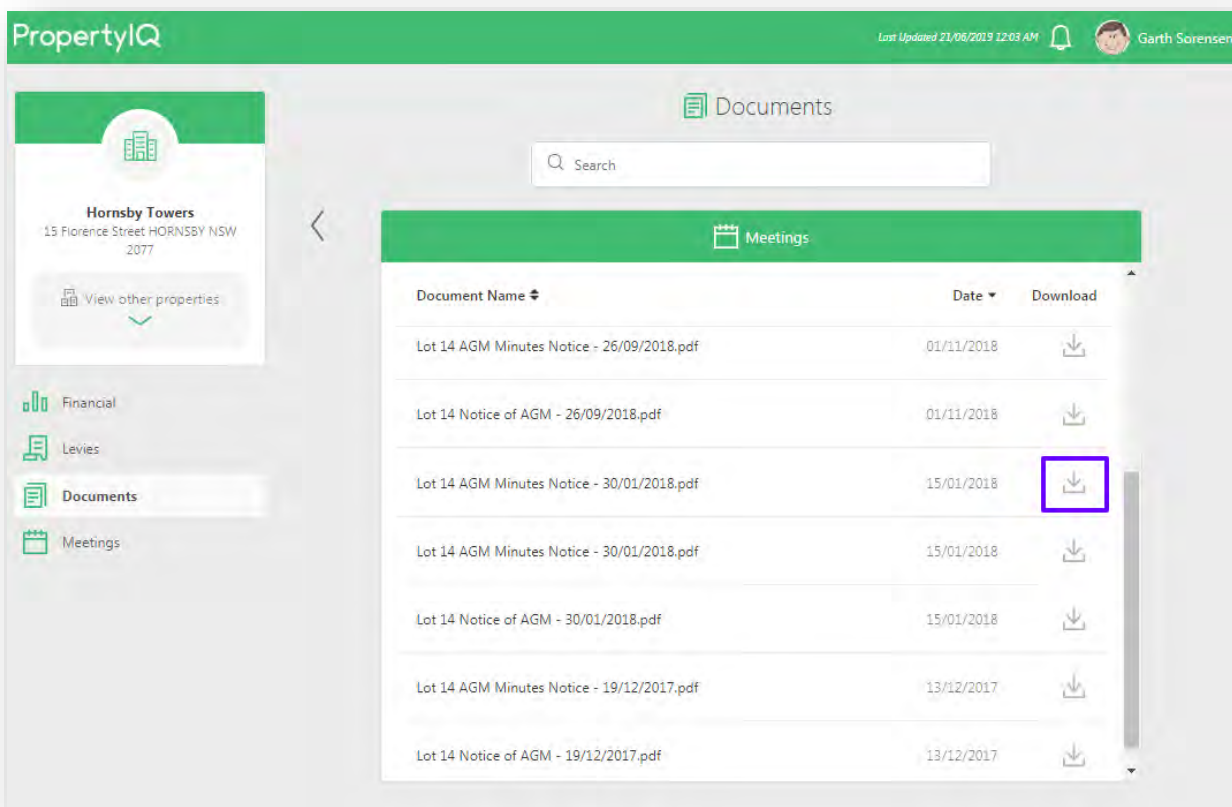
1. Select *Documents*
2. You can search all document names by entering some key words/letters here
3. Click on the green panels to open each document area
4. You can download a PDF copy of a document by clicking on this symbol
5. Only the latest four documents show here. You can view all documents your 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 a user profile for 'Garth Sorensen'. On the left sidebar, there are three menu items: 'Levies', 'Documents' (highlighted with a blue circle and the number 1), and 'Meetings'. The main content area is titled 'Documents' and features a search bar (with a blue circle and the number 2). Below the search bar are four category tabs: 'Building', 'Lot', 'Financial' (with a blue circle and the number 3), and 'Meetings'. The 'Financial' tab is active, displaying a list of documents with columns for document name, date, and a download icon (with a blue circle and the number 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). At the bottom of the list is a 'Show more' link (with a blue circle and the number 5). To the right of the 'Financial' tab is the 'Meetings' tab, which shows a list of 'Lot 14 Notice of AGM - 17/02/2019.pdf' documents (dated 16/02/2019) and a 'Show more' link. At the bottom of the main content area are two more category tabs: 'Insurance' and 'General'.

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*

The screenshot displays the PropertyIQ Meetings interface for the property 'Hornsby Towers'. The interface is divided into several sections:

- Header:** PropertyIQ logo, last updated time (05/07/2019 12:04 AM), user profile (Garth Sorensen), and a 'View all properties' button (4).
- Property Card:** Hornsby Towers, 15 Florence Street HORNSBY NSW 2077, with a 'View other properties' button (1).
- Navigation:** Financial, Levies, Documents, and Meetings (1).
- Calendar:** September 2019, with a 'Today' button (2). The calendar shows a meeting on Friday, 5th September (3).
- Upcoming meetings:** 05 September 2019, Strata Committee Meeting, Hornsby Towers, 3:00 PM to 4:30 PM, Precise Property Office, 1/29 Shearwater Drive, Taylors Beach NSW 2316. Includes 'Agenda' (5) and 'Calendar' (6) icons.
- Previous meetings:** A dropdown menu for the year (7) showing meetings from 2019:
 - 28 June 2019: Annual General Meeting, Moorings on Cavill (8)
 - 20 June 2019: Annual General Meeting, Moorings on Cavill
 - 19 June 2019: Annual General Meeting, Vibe Shenton Park

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.