

NOTE: After you add a property, placeholder groups are created automatically for expenses such as water rates and council rates. For example, if you click 'Edit Transaction Group' for council rates after adding a property, you will notice that quarterly payment frequency has been auto-selected since council rates are typically paid quarterly. If you click UPDATE TRANSACTION GROUP, it will automatically create quarterly transactions for the amount inputted for the current financial year (or whatever time period you specify in the form). Read further below.

Editing Transaction Groups

1. In the Manage Transactions screen, click 'Edit Transactions' for the relevant transaction group you wish to update.

| Manage Transactions | | | | | | | | | | | | | BACK |
|--|--|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-----------------------|
| 1008/98 Gloucester Street, The Rocks NSW | | | | | | | | | | | | | ADD TRANSACTION GROUP |
| | ← Prev Year Next Year → | | | | | | | | | | | | |
| Income | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | Total |
| Rent | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | \$40,092.00 |
| Edit Transactions | | | | | | | | | | | | | |
| Total Income | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$40,092.00 |
| Mortgage | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | Total |
| Loan Repayments | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | \$27,008.16 |
| Edit Transactions | | | | | | | | | | | | | |
| Total Mortgage | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$27,008.16 |
| Expenses | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | Total |

2. Click **Edit Transaction Group** in the top sub-navigation area when you arrive at the Edit Transactions page.

Edit Transactions

BACK

1008/98 Gloucester Street, The Rocks NSW

ADD TRANSACTION

Edit Transaction Group [Apply Bulk Transaction Updates](#) [Replicate Transactions](#) [Extend Transaction Pattern](#)

| Edit | Transaction Name | Amount | Confirm Transaction | Date of Transaction |
|----------------------|------------------|------------|-------------------------|---------------------|
| Edit | Rent | \$3,341.00 | Confirmed | 31 Jul 2019 |
| Edit | Rent | \$3,341.00 | Confirmed | 31 Aug 2019 |
| Edit | Rent | \$3,341.00 | Confirmed | 30 Sep 2019 |
| Edit | Rent | \$3,341.00 | Confirm | 31 Oct 2019 |
| Edit | Rent | \$3,341.00 | Confirm | 30 Nov 2019 |
| Edit | Rent | \$3,341.00 | Confirm | 31 Dec 2019 |
| Edit | Rent | \$3,341.00 | Confirm | 31 Jan 2020 |
| Edit | Rent | \$3,341.00 | Confirm | 29 Feb 2020 |
| Edit | Rent | \$3,341.00 | Confirm | 31 Mar 2020 |

3. You can edit the fields in the Edit Transaction Group screen as required, including the transaction frequency and amount. You can also specify a date range for the transaction group. Click **UPDATE TRANSACTION GROUP** to commit the changes. A popup message will appear to confirm you are happy to proceed. Click 'Yes' if you are happy. It is important to note that the update will override all transactions within the transaction group based on the selected criteria.

Edit Transaction Group

BACK

1008/98 Gloucester Street, The Rocks NSW

Name of Transaction Group:

Category:

Type of Transaction Group:

Frequency:

Amount (\$):

Monthly:

Apply from:

Apply to:

[Delete Transaction Group](#) UPDATE TRANSACTION GROUP

- The Transaction Group will be updated, and you will arrive back at the Manage Transactions page.

Manage Transactions
BACK

1008/98 Gloucester Street, The Rocks NSW
ADD TRANSACTION GROUP

Transaction group has been updated successfully.

« Prev Year
Next Year »

| | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | |
|---|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|
| Income | | | | | | | | | | | | | Total |
| Rent | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | \$40,092.00 |
| Edit Transactions | | | | | | | | | | | | | |
| Total Income | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$40,092.00 |
| | | | | | | | | | | | | | |
| Mortgage | | | | | | | | | | | | | Total |
| Loan Repayments | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | \$27,008.16 |
| Edit Transactions | | | | | | | | | | | | | |
| Total Mortgage | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$27,008.16 |

Editing Loan Transaction Groups

1. In the Manage Transactions screen, click 'Edit Transactions' for a relevant loan transaction group (under **Mortgage** category).

| Manage Transactions | | | | | | | | | | | | | BACK |
|--|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-----------------------|
| 1008/98 Gloucester Street, The Rocks NSW | | | | | | | | | | | | | ADD TRANSACTION GROUP |
| << Prev Year Next Year >> | | | | | | | | | | | | | |
| Income | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | Total |
| Rent | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | 3,341.00 | \$40,092.00 |
| Edit Transactions | | | | | | | | | | | | | |
| Total Income | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$3,341.00 | \$40,092.00 |
| Mortgage | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | Total |
| Loan Repayments | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | 2,250.68 | \$27,008.16 |
| Edit Transactions | | | | | | | | | | | | | |
| Total Mortgage | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$2,250.68 | \$27,008.16 |

2. Click **Edit Transaction Group** in the top sub-navigation area when you arrive at the Edit Transactions page.

| Edit Transactions | | | | | | | | | | | | | BACK |
|---|------------------|------------|-------------------------|---------------------|--|--|--|--|--|--|--|--|-----------------|
| 1008/98 Gloucester Street, The Rocks NSW | | | | | | | | | | | | | ADD TRANSACTION |
| Edit Transaction Group Apply Bulk Transaction Updates Replicate Transactions Extend Transaction Pattern | | | | | | | | | | | | | |
| Edit | Transaction Name | Amount | Confirm Transaction | Date of Transaction | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Jul 2019 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Aug 2019 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Sep 2019 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Oct 2019 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Nov 2019 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Dec 2019 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Jan 2020 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Feb 2020 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Mar 2020 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Apr 2020 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 May 2020 | | | | | | | | | |
| Edit | Loan Repayments | \$2,250.68 | Confirm | 12 Jun 2020 | | | | | | | | | |

3. PropertyDirector gives you the option to either automatically calculate your loan repayments, or explicitly specify your loan repayment amount – you can configure this by selecting one of the options shown in the section highlighted in red below. You also have the ability to specify the loan repayment frequency, type of loan, and offset balance amount, in addition to the standard features available to edit transaction groups.

Click **UPDATE TRANSACTION GROUP** to commit the changes. A popup message will appear to confirm you are happy to proceed. Click 'Yes' if you are happy. It is important to note that the update will override all transactions within the loan transaction group based on the selected criteria.

Edit Transaction Group BACK

1008/98 Gloucester Street, The Rocks NSW

[Edit Loan Balance](#) [Edit Bank/Financial Institution Name](#)

| | | | |
|---|-----------------------------|----------------------------|-----------------------------|
| Name of Transaction Group | Category | Type of Transaction Group | Frequency |
| Loan Repayments | Mortgage Repayments | Recurring | Monthly |
| Loan Type | Bank/Financial Institution* | Interest Rate (%)* | Loan Term (years)* |
| Principal and Interest | St George | 3.99 | 30 |
| Variable/Fixed Loan* | Original Loan (\$)* | Current Loan Balance (\$)* | Offset Account Balance (\$) |
| Fixed | 472,000.00 | 454,600.00 | 0.00 |
| Monthly | Apply from: | Apply to: | |
| 12th of the month | 1 7 2019 | 30 6 2020 | |
| <input type="radio"/> Calculate the amount for me | | 2,123 | |
| <input checked="" type="radio"/> I want to specify the amount | | | |

[Delete Transaction Group](#) UPDATE TRANSACTION GROUP

Auto-calculating Property Management Fees

1. After adding a property, PropertyDirector automatically creates a placeholder transaction group in the Manage Transactions screen for 'Property Management Fee'. Click 'Edit Transactions' for the Property Management Fee transaction group.

| 22/132 Coreen Ave, Penrith NSW | | | | | | | | | | | | ADD TRANSACTION GROUP | |
|--|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-----------------------|-------------|
| << Prev Year Next Year >> | | | | | | | | | | | | | |
| Income | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | Total |
| Rent Edit Transactions | 2,300.00 | 2,300.00 | 2,300.00 | 2,300.00 | 2,300.00 | 2,300.00 | 2,300.00 | 2,300.00 | 2,300.00 | 2,300.00 | 2,300.00 | 2,300.00 | \$27,600.00 |
| Total Income | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$2,300.00 | \$27,600.00 |
| Mortgage | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | Total |
| Loan Repayments Edit Transactions | 1,960.76 | 1,960.76 | 1,960.76 | 1,960.76 | 1,960.76 | 1,960.76 | 1,960.76 | 1,960.76 | 1,960.76 | 1,960.76 | 1,960.76 | 1,960.76 | \$23,529.14 |
| Total Mortgage | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$1,960.76 | \$23,529.14 |
| Expenses | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | Total |
| Property Management Fee Edit Transactions | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | \$0.00 |
| Council Rates Edit Transactions | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | \$0.00 |

2. Click **Edit Transaction Group** in the top sub-navigation area when you arrive at the Edit Transactions page.

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Edit Transactions

BACK

22/132 Coreen Ave, Penrith NSW

ADD TRANSACTION

Edit Transaction Group
Apply Bulk Transaction Updates
Replicate Transactions
Extend Transaction Pattern

No transactions have been added to this group yet. Please click 'Add Transaction' above to add new transactions.

5. The list of property management transactions will be listed. Each transaction amount will correspond with the property management % inputted in step 3 above and align with the same rental payment frequency as the rental income transaction group selected in step 3.

Edit Transactions

BACK

22/132 Coreen Ave, Penrith NSW

ADD TRANSACTION

[Edit Transaction Group](#) [Apply Bulk Transaction Updates](#) [Replicate Transactions](#) [Extend Transaction Pattern](#)

| Edit | Transaction Name | Amount | Confirm Transaction | Date of Transaction |
|----------------------|-------------------------|----------|-------------------------|---------------------|
| Edit | Property Management Fee | \$126.50 | Confirm | 31 Jul 2019 |
| Edit | Property Management Fee | \$126.50 | Confirm | 31 Aug 2019 |
| Edit | Property Management Fee | \$126.50 | Confirm | 30 Sep 2019 |
| Edit | Property Management Fee | \$126.50 | Confirm | 31 Oct 2019 |
| Edit | Property Management Fee | \$126.50 | Confirm | 30 Nov 2019 |
| Edit | Property Management Fee | \$126.50 | Confirm | 31 Dec 2019 |
| Edit | Property Management - | \$126.50 | Confirm | 31 Jan 2020 |