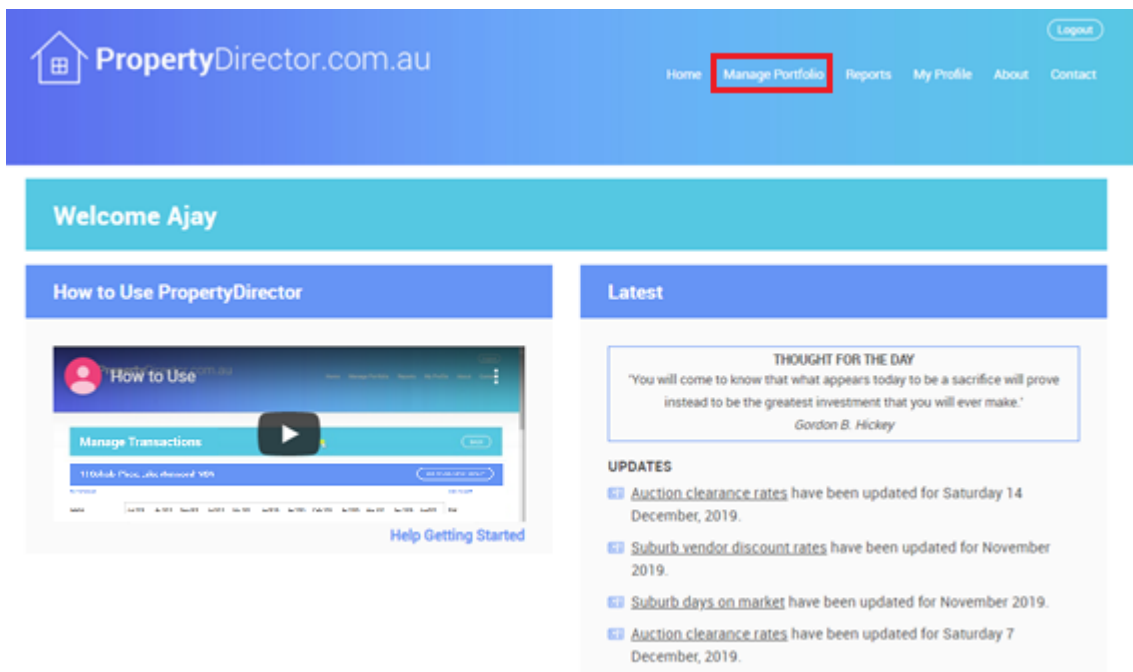
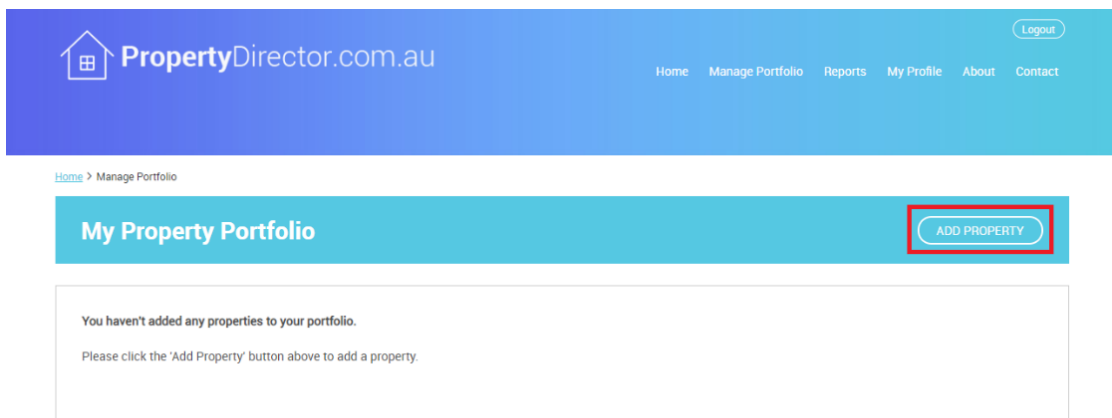


## How to Add a Property (Houses / Apartments / Townhouses / Villas)

1. Click **Manage Portfolio** in the top navigation.



2. You will arrive at the Manage Portfolio page. Click the **ADD PROPERTY** button in the top right.



3. On the Add Property page, enter the 'General Details' associated with your property. You only need to input the mandatory items marked with an asterisk (\*).

## Add Property

BACK

### General Details

**Address\***

**Status\***  **Property Type\***

**Purchased\***

**Purchase Price (\$)\***  **Current Price (\$)\***  **Ownership (%)\***

**Beds:**  **Baths:**  **Car Spaces:**

**Interior (sqm):**  **Land (sqm):**

**Insurance:**  
Do you want to get an automatic reminder to pay your insurance?  
 Yes  No

**Comments:**

4. Enter the 'Rental Income Details' for the property. Specify the rent payment frequency (e.g. Monthly, Weekly), the day of rent payment (e.g. last day of the month), rental amount, and income type (e.g. standard rental income, granny flat income). If you generate additional income from the same property, click 'Add New Income Source' in the top right and it will generate a new rental income box which you can fill in.

### Rental Income Details

If the property is a Principal Place of Residence (PPOR), you can input \$0 for Rent. [Add New Income Source](#)

**Payment Frequency\***  **Monthly** **Monthly Rent (\$)\***  **Income Type\***

5. Enter the 'Mortgage Details' for the property. Specify loan type, bank name, and interest rate details. The original loan amount should be entered correctly to ensure accurate loan repayment calculations. The loan balance should be inputted correctly to ensure the equity calculation is accurate. You can specify your loan offset account balance if you have one. Near the bottom, please specify the loan repayment frequency (e.g. monthly) and day of payment (e.g. 12<sup>th</sup> of the month). You can also specify whether you wish to calculate the loan repayment automatically, or if you wish to specify the amount yourself. If you have more than one loan, click 'Add Another Loan' in the top right and it will generate a new loan box which you can fill in. Click ADD PROPERTY once you are done.

### Mortgage Details

[Add Another Loan](#)

|  |                             |                            |                             |
|--|-----------------------------|----------------------------|-----------------------------|
| 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                     | 454,600                    |                             |
| Payment Frequency  | Monthly                     |                            |                             |
| Monthly ▼  | 12th of the month ▼         |                            |                             |
| <input checked="" type="radio"/> Calculate the amount for me |                             |                            |                             |
| <input type="radio"/> I want to specify the amount           |                             |                            |                             |

[ADD PROPERTY](#)

**NOTE:** if you selected 'Fully owned (loan repaid)' for 'Status' under the General Details section, the mortgage details section will be hidden (since there is no outstanding loan).

If you selected 'Sold' for 'Status' under the General Details section, additional fields will be made visible for Sold Date, Sold Price, and Loan Balance at Sale - rental income and mortgage details sections will be hidden since the property has been sold.

- After you add your property, you will arrive at the 'Manage Transactions' page. Transaction groups will be created automatically for Rent and Loan Repayments, and placeholder groups will be created for expenses. This will enable you to edit and manage all of your transactions easily. Click **Manage Portfolio** in the top navigation.

| 1008/98 Gloucester Street, The Rocks NSW                     |            |            |            |            |            |            |            |            |            |            |            |            | ADD TRANSACTION GROUP |
|--|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-----------------------|
| « Prev Year  |            |            |            |            |            |            |            |            |            |            |            |            | Next Year »           |
| <b>Income</b>  | 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<br><a href="#">Edit Transactions</a>                    | 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           |
| <b>Total Income</b>  | \$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           |
| <b>Mortgage</b>  | 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<br><a href="#">Edit Transactions</a>         | 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           |
| <b>Total Mortgage</b>  | \$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           |
| <b>Expenses</b>  | 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<br><a href="#">Edit Transactions</a> | 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                |

- The property you just added will now be listed on the 'Manage Portfolio' page. Use any of the 3 buttons (highlighted in red below) to view/edit your property details, manage transactions, or attach statements.

[Logout](#)

[Home](#) [Manage Portfolio](#) [Reports](#) [My Profile](#) [About](#) [Contact](#)

[Home](#) > Manage Portfolio

**My Property Portfolio**
ADD PROPERTY

You own **1** investment property and have **\$480,400.00** in equity. 1-1 of 1

📍 1008/98 Gloucester Street, The Rocks NSW
FORECAST VALUE
Apartment / Unit

Purchased **April 2009**

---

📊 Equity: **\$480,400.00**

Purchase Price **\$440,000.00**

---

📅 Weekly Rent (FY 19-20): **\$771.00 p/w**

Current Valuation **\$935,000.00**

---

📈 Annual Cashflow (FY 19-20): **\$13,083.84**

[VIEW/EDIT PROPERTY](#)

[MANAGE TRANSACTIONS](#)

[ATTACH STATEMENTS](#)

1-1 of 1

## How to Add a Property (Land)

Adding land is identical to adding a regular property (see above) - the only difference is that when you select 'Land' as the property type, the system will hide the Beds, Baths, Car Spaces, and Interior (sqm) fields since these do not apply for land.

## How to Add a Property (Block of Units)

1. Go to the Add Property page and select 'Block of Units' as the Property Type.  
This will hide the Beds, Baths, and Car Spaces fields since these apply to individual units.

### Add Property

BACK

#### General Details

**Address\***

**Status\***  **Property Type\***  **No. of Units\***  **Purchased\***

**Purchase Price (\$)\***  **Current Price (\$)\***  **Ownership (%)\***

**Interior (sqm):**  **Land (sqm):**

**Insurance:**  
Do you want to get an automatic reminder to pay your insurance?  
 Yes  No

**Comments:**

2. Enter the 'General Details' associated with the Block of Units. Ensure you select the 'No. of Units' correctly (e.g. 4). You only need to input the mandatory items marked with an asterisk (\*).

### Add Property

BACK

#### General Details

**Address\***

**Status\***  **Property Type\***  **No. of Units\***  **Purchased\***

**Purchase Price (\$)\***  **Current Price (\$)\***  **Ownership (%)\***

**Interior (sqm):**  **Land (sqm):**

**Insurance:**  
Do you want to get an automatic reminder to pay your insurance?  
 Yes  No

**Comments:**

3. Scroll down to the 'Unit Block Details' section. Fill in details for each unit (the system will automatically create the number of units based on your selection of the 'No of Units' in step 2 above). Specify the rent payment frequency (e.g. Monthly, Weekly), the day of rent payment (e.g. last day of the month), rental amount, and income type (e.g. standard rental income). If you want to add another Room (Unit), simply click 'Add Another Room'.

**Unit Block Details**

[Add Another Room](#)

|                                   |   |                                    |                                      |  |
|-----------------------------------|---|------------------------------------|--------------------------------------|--|
| <b>Room Number*</b>               | <b>Tenant Name</b>                            | <b>Monthly Rent (\$)*</b>          | <b>Payment Frequency*</b>            | <b>Monthly</b>                                     |
| <input type="text" value="1001"/> | <input type="text" value="Michael Williams"/> | <input type="text" value="1,600"/> | <input type="text" value="Monthly"/> | <input type="text" value="Last day of the month"/> |
| <b>Interior (sqm)</b>             | <b>Total (sqm)</b>                            | <b>Parking Spot</b>                | <b>Beds</b>                          | <b>Baths</b>                                       |
| <input type="text"/>              | <input type="text"/>                          | <input type="text" value="No"/>    | <input type="text" value="1"/>       | <input type="text" value="1"/>                     |

[Add Another Room](#)

|                                   |   |                                    |                                      |  |
|-----------------------------------|---|------------------------------------|--------------------------------------|--|
| <b>Room Number*</b>               | <b>Tenant Name</b>                          | <b>Monthly Rent (\$)*</b>          | <b>Payment Frequency*</b>            | <b>Monthly</b>                                     |
| <input type="text" value="1002"/> | <input type="text" value="Jimmy Rosemond"/> | <input type="text" value="1,850"/> | <input type="text" value="Monthly"/> | <input type="text" value="Last day of the month"/> |
| <b>Interior (sqm)</b>             | <b>Total (sqm)</b>                          | <b>Parking Spot</b>                | <b>Beds</b>                          | <b>Baths</b>                                       |
| <input type="text"/>              | <input type="text"/>                        | <input type="text" value="Yes"/>   | <input type="text" value="2"/>       | <input type="text" value="1"/>                     |

4. Enter the 'Mortgage Details' for the property. Specify loan type, bank name, and interest rate details. The original loan amount should be entered correctly to ensure accurate loan repayment calculations. The loan balance should be inputted correctly to ensure the equity calculation is accurate. You can specify your loan offset account balance if you have one. Near the bottom, please specify the loan repayment frequency (e.g. monthly) and day of payment (e.g. 10<sup>th</sup> of the month). You can also specify whether you wish to calculate the loan repayment automatically, or if you wish to specify the amount yourself. If you have more than one loan, click 'Add Another Loan' in the top right and it will generate a new loan box which you can fill in. Click ADD PROPERTY once you are done.

**Mortgage Details**

[Add Another Loan](#)

|   |  |                                      |                                     |
|---|--|--------------------------------------|-------------------------------------|
| <b>Loan Type*</b>                                   | <b>Bank/Financial Institution*</b>             | <b>Interest Rate (%)*</b>            | <b>Loan Term (years)*</b>           |
| <input type="text" value="Principal and Interest"/> | <input type="text" value="St George"/>         | <input type="text" value="4.5"/>     | <input type="text" value="30"/>     |
| <b>Variable/Fixed Loan*</b>                         | <b>Original Loan (\$)*</b>                     | <b>Current Loan Balance (\$)*</b>    | <b>Offset Account Balance (\$)</b>  |
| <input type="text" value="Variable"/>               | <input type="text" value="1,000,000"/>         | <input type="text" value="920,000"/> | <input type="text" value="20,000"/> |
| <b>Payment Frequency</b>                            | <b>Monthly</b>                                 |                                      |                                     |
| <input type="text" value="Monthly"/>                | <input type="text" value="10th of the month"/> |                                      |                                     |

Calculate the amount for me  
 I want to specify the amount

[ADD PROPERTY](#)

**NOTE:** if you selected 'Fully owned (loan repaid)' for 'Status' under the General Details section, the mortgage details section will be hidden (since there is no outstanding loan).

If you selected 'Sold' for 'Status' under the General Details section, additional fields will be made visible for Sold Date, Sold Price, and Loan Balance at Sale - rental income and mortgage details sections will be hidden since the property has been sold.

- After you add your property, you will arrive at the 'Manage Transactions' page. Transaction groups will be created automatically for Rent (one line per unit) and Loan Repayments, and placeholder groups will be created for expenses. This will enable you to edit and manage all of your transactions easily. Click **Manage Portfolio** in the top navigation.

| 10 Sohrabi Place, Lake Munmorah NSW       |            |            |            |            |            |            |            |            |            |            |            |                             | ADD TRANSACTION GROUP |
|---|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-----------------------------|-----------------------|
| <a href="#">« Prev Year</a>               |            |            |            |            |            |            |            |            |            |            |            | <a href="#">Next Year »</a> |                       |
| 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<br><a href="#">Edit Transactions</a> | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00                    | \$19,200.00           |
| Rent<br><a href="#">Edit Transactions</a> | 1,850.00   | 1,850.00   | 1,850.00   | 1,850.00   | 1,850.00   | 1,850.00   | 1,850.00   | 1,850.00   | 1,850.00   | 1,850.00   | 1,850.00   | 1,850.00                    | \$22,200.00           |
| Rent<br><a href="#">Edit Transactions</a> | 1,700.00   | 1,700.00   | 1,700.00   | 1,700.00   | 1,700.00   | 1,700.00   | 1,700.00   | 1,700.00   | 1,700.00   | 1,700.00   | 1,700.00   | 1,700.00                    | \$20,400.00           |
| Rent<br><a href="#">Edit Transactions</a> | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00   | 1,600.00                    | \$19,200.00           |
| <b>Total Income</b>                       | \$6,750.00 | \$6,750.00 | \$6,750.00 | \$6,750.00 | \$6,750.00 | \$6,750.00 | \$6,750.00 | \$6,750.00 | \$6,750.00 | \$6,750.00 | \$6,750.00 | \$6,750.00                  | \$81,000.00           |

| 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<br><a href="#">Edit Transactions</a> | 4,965.52 | 4,965.52 | 4,965.52 | 4,965.52 | 4,965.52 | 4,965.52 | 4,965.52 | 4,965.52 | 4,965.52 | 4,965.52 | 4,965.52 | 4,965.52 | \$59,586.19 |

- You will now see your property listed in the 'Manage Portfolio' page. Use any of the 3 buttons (highlighted in red below) to view/edit your property details, manage transactions, or attach statements.

[Logout](#)

[Home](#)   [Manage Portfolio](#)   [Reports](#)   [My Profile](#)   [About](#)   [Contact](#)

Home > Manage Portfolio

## My Property Portfolio

ADD PROPERTY

You own 6 investment properties and have \$1,990,324.00 in equity. 1-6 of 6

📍 10 Sohrabi Place, Lake Munmorah NSW
FORECAST VALUE
Block of Units

Purchased **July 2015**

🏠 Equity: **\$880,000.00**

Purchase Price **\$1,350,000.00**

📅 Weekly Rent (FY 19-20): **\$1,557.69 p/w**

Current Valuation **\$1,800,000.00**

💰 Annual Cashflow (FY 19-20): **\$21,413.81**

VIEW/EDIT PROPERTY

MANAGE TRANSACTIONS

ATTACH STATEMENTS