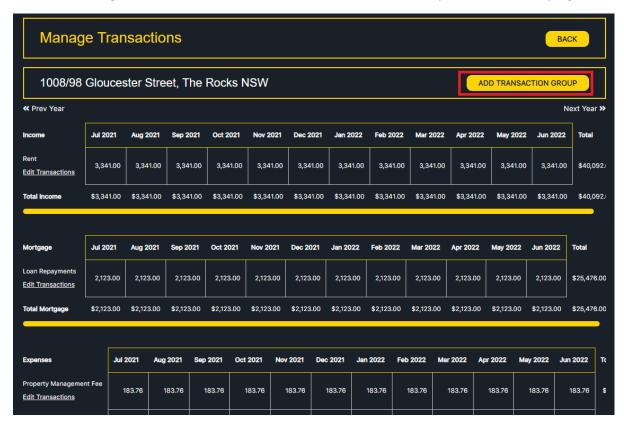
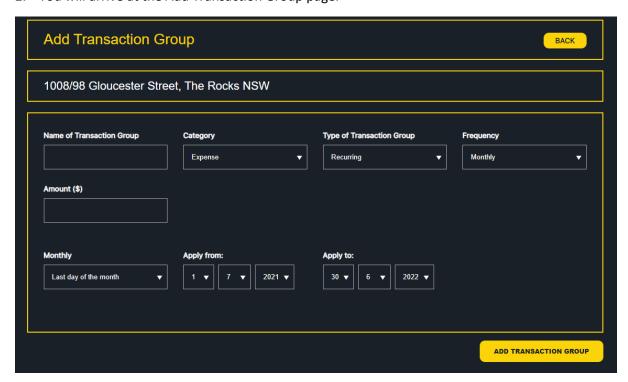
Adding Transaction Groups

1. In the Manage Transactions screen, click the 'Add Transaction Group' button in the top right.



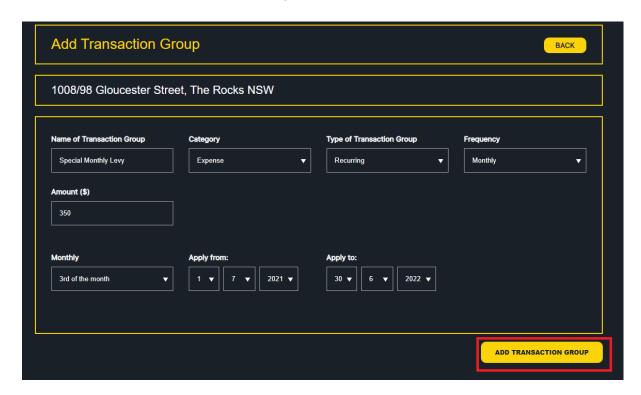
2. You will arrive at the Add Transaction Group page.



3. Enter a name for the transaction group, then select a transaction category – you can select from rental income, expenses, mortgage repayments, or capital expense categories. The mortgage repayments category will give you additional form input options such as bank and interest rate information. The capital expense category allows you to input expenses of a capital nature.

Specify the type of transaction group - recurring or ad-hoc. Recurring means transactions of a recurring/ongoing nature (as its name implies), while ad-hoc is simply a 'bucket' enabling you to capture transactions of an ad-hoc nature. Selecting ad-hoc transaction group will hide most of the fields and you can simply add the transaction group.

If you select recurring, you will need to specify the transaction frequency, amount, dates of payment (e.g. 3rd of the month), and the date range for the transaction group (i.e. from and to). For the example below, we will create a 'Special Monthly Levy' transaction group for the amount of \$350 per month for a full financial year (01/07/2019 to 30/06/2020). Click 'ADD TRANSACTION GROUP' once you are done.



4. The Transaction Group will be added, and you will arrive back at the Manage Transactions page - you will see the newly created transaction group displayed under 'Expenses', as highlighted below. Click Edit Transactions for the transaction group.

Council Rates <u>Edit Transactions</u>	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.01
Water Rates <u>Edit Transactions</u>	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.01
Strata/Body Corporate <u>Edit Transactions</u>	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.01
Maintenance & Repairs <u>Edit Transactions</u>	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.0(
Other 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	\$0.01
Special Monthly Levy <u>Edit Transactions</u>	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	\$4,200.00
Total Expenses	\$533.76	\$533.76	\$533.76	\$533.76	\$533.76	\$533.76	\$533.76	\$533.76	\$533.76	\$533.76	\$533.76	\$533.76	\$6,405.00
Net	\$684.25	\$684.25	\$684.25	\$684.25	\$684.25	\$684.25	\$684.25	\$684.25	\$684.25	\$684.25	\$684.25	\$684.25	\$8,210.9
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5. The list of transactions will be displayed (one per month as specified in step 3 above).

