

Adding Transaction Groups

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

Manage Transactions

BACK

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

« Prev Year
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Income	Jul 2021	Aug 2021	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	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 2021	Aug 2021	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Total
Loan Repayments	2,123.00	2,123.00	2,123.00	2,123.00	2,123.00	2,123.00	2,123.00	2,123.00	2,123.00	2,123.00	2,123.00	2,123.00	\$25,476.00
Edit Transactions													
Total Mortgage	\$2,123.00	\$2,123.00	\$2,123.00	\$2,123.00	\$2,123.00	\$2,123.00	\$2,123.00	\$2,123.00	\$2,123.00	\$2,123.00	\$2,123.00	\$2,123.00	\$25,476.00

Expenses	Jul 2021	Aug 2021	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Total
Property Management Fee	183.76	183.76	183.76	183.76	183.76	183.76	183.76	183.76	183.76	183.76	183.76	183.76	\$
Edit Transactions													

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

Add Transaction Group

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Name of Transaction Group	Category	Type of Transaction Group	Frequency
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text" value="Expense"/>	<input style="width: 90%;" type="text" value="Recurring"/>	<input style="width: 90%;" type="text" value="Monthly"/>

Amount (\$)

Monthly	Apply from:	Apply to:
<input style="width: 90%;" type="text" value="Last day of the month"/>	<input style="width: 30px;" type="text" value="1"/> <input style="width: 30px;" type="text" value="7"/> <input style="width: 30px;" type="text" value="2021"/>	<input style="width: 30px;" type="text" value="30"/> <input style="width: 30px;" type="text" value="6"/> <input style="width: 30px;" type="text" value="2022"/>

ADD TRANSACTION GROUP

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.

Add Transaction Group BACK

1008/98 Gloucester Street, The Rocks NSW

Name of Transaction Group	Category	Type of Transaction Group	Frequency
Special Monthly Levy	Expense	Recurring	Monthly

Amount (\$)

350

Monthly

Apply from: 1 7 2021

Apply to: 30 6 2022

ADD TRANSACTION GROUP

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 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
Water 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
Strata/Body Corporate 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
Maintenance & Repairs 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
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	\$0.00
Special Monthly Levy Edit Transactions	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	\$8,210.90

5. The list of transactions will be displayed (one per month as specified in step 3 above).

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	Special Monthly Levy	\$350.00	Confirm	3 Jul 2021
Edit	Special Monthly Levy	\$350.00	Confirm	3 Aug 2021
Edit	Special Monthly Levy	\$350.00	Confirm	3 Sep 2021
Edit	Special Monthly Levy	\$350.00	Confirm	3 Oct 2021
Edit	Special Monthly Levy	\$350.00	Confirm	3 Nov 2021