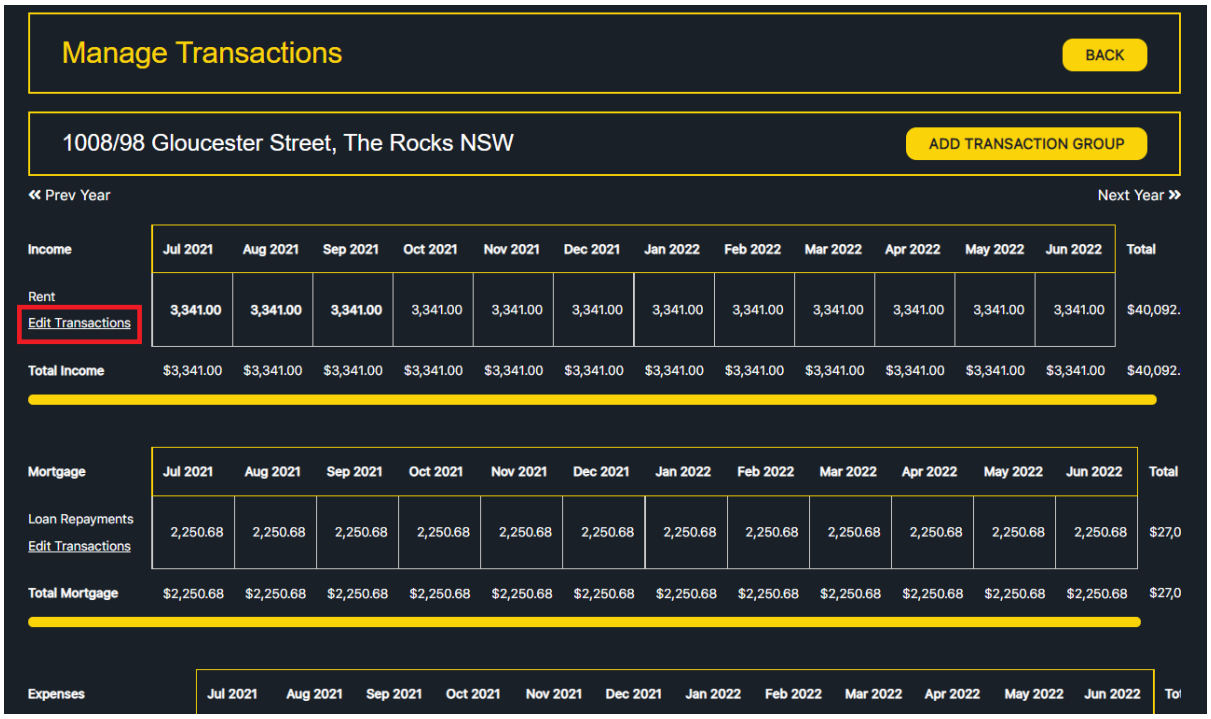
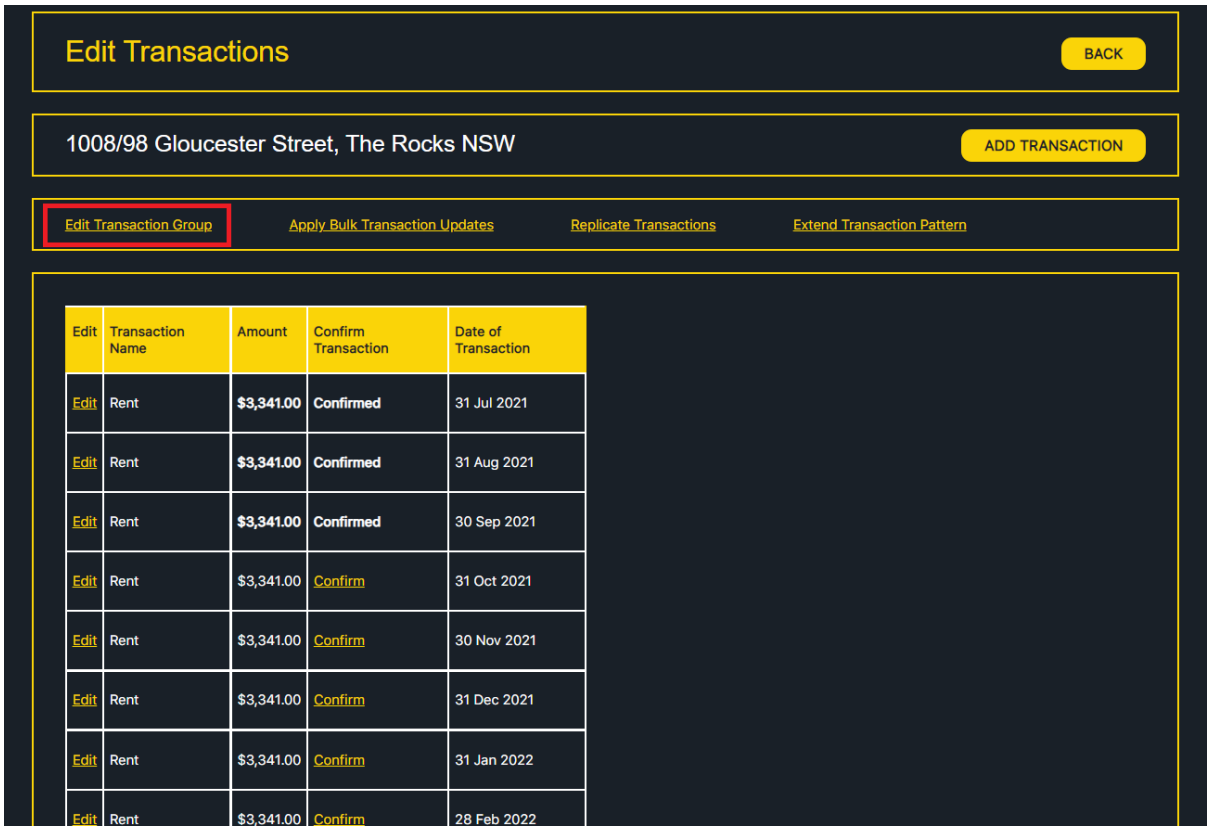
<u>NOTE:</u> After you add a property, placeholder groups are created automatically for expenses such as water rates and council rates. For example, if you click 'Edit Transaction Group' for council rates after adding a property, you will notice that quarterly payment frequency has been auto-selected 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

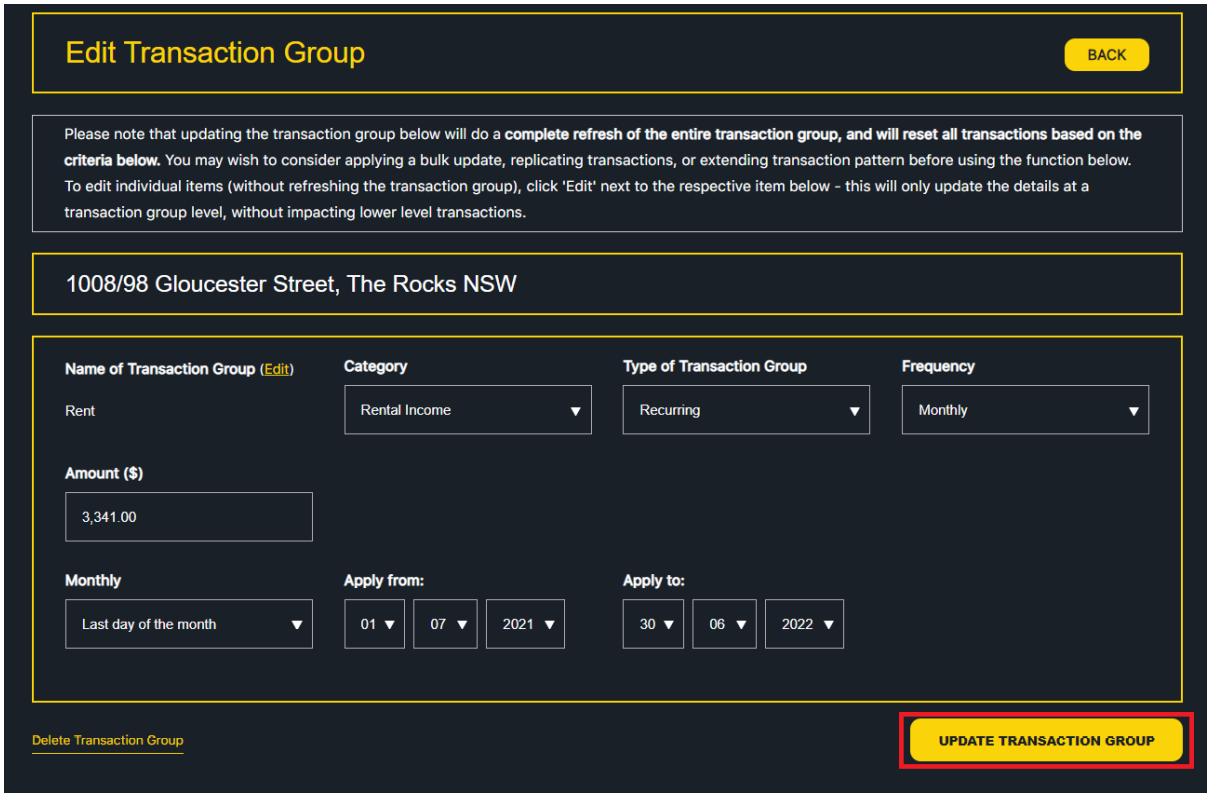
1. In the Manage Transactions screen, click 'Edit Transactions' for the relevant transaction group you wish to update.



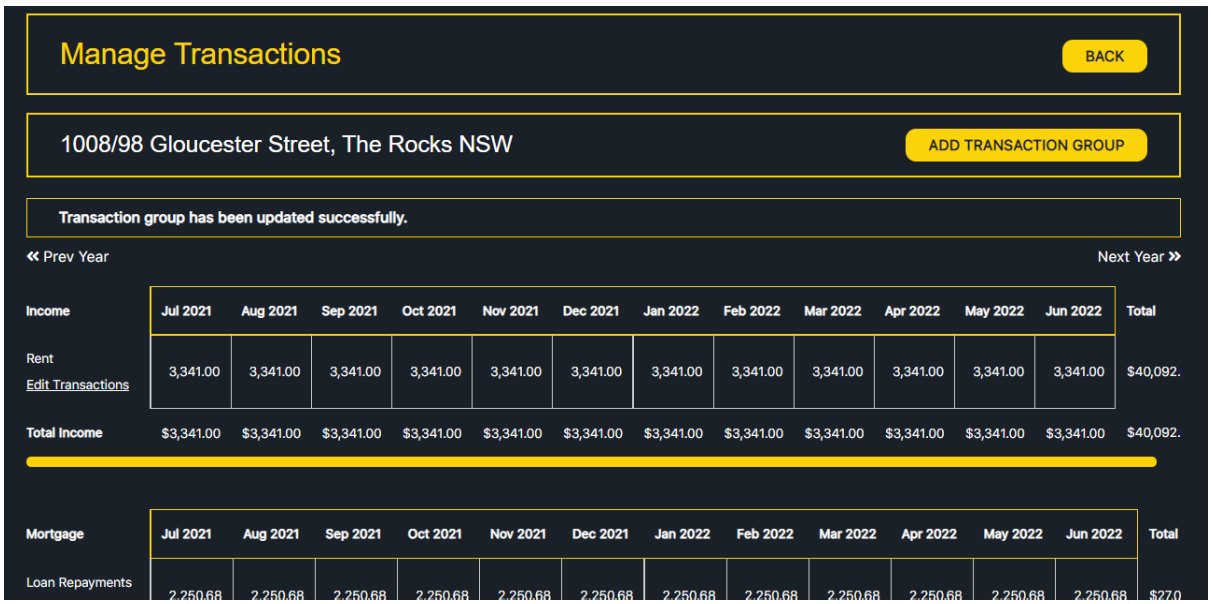
2. Click **Edit Transaction Group** in the top sub-navigation area when you arrive at the Edit Transactions page.



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.

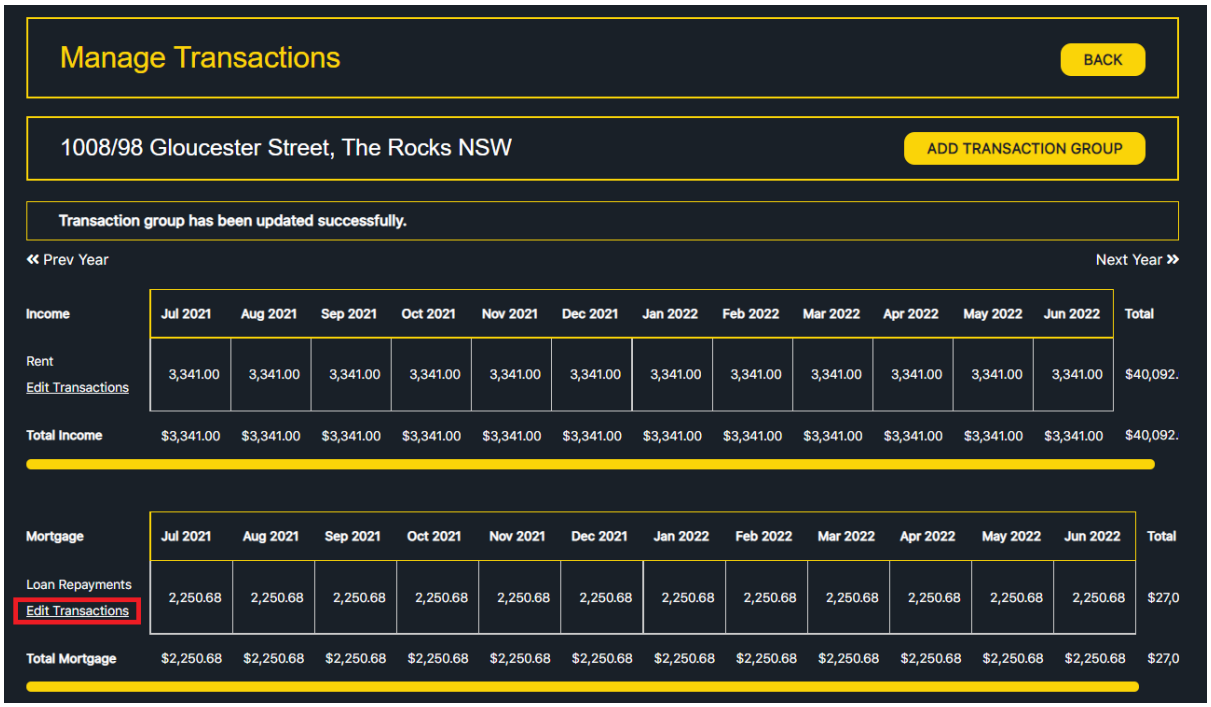


4. The Transaction Group will be updated, and you will arrive back at the Manage Transactions page.

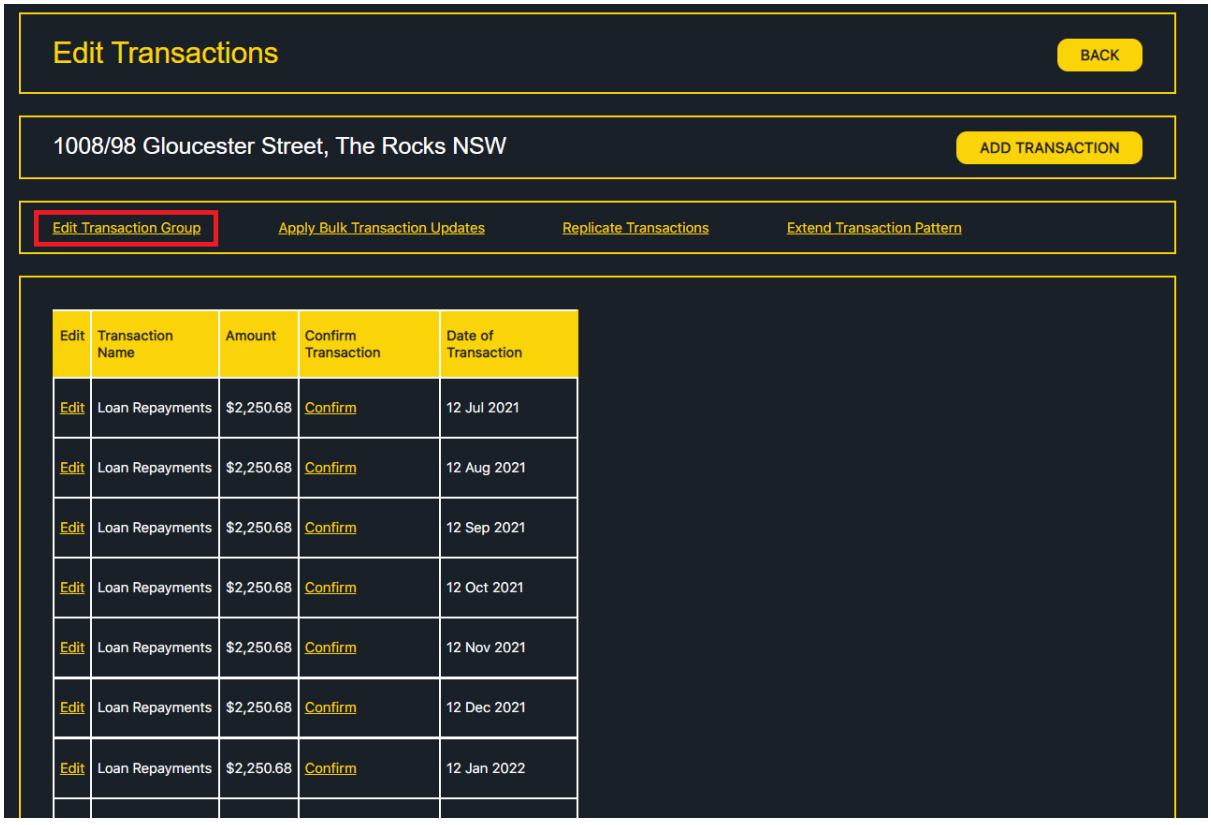


Editing Loan Transaction Groups

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

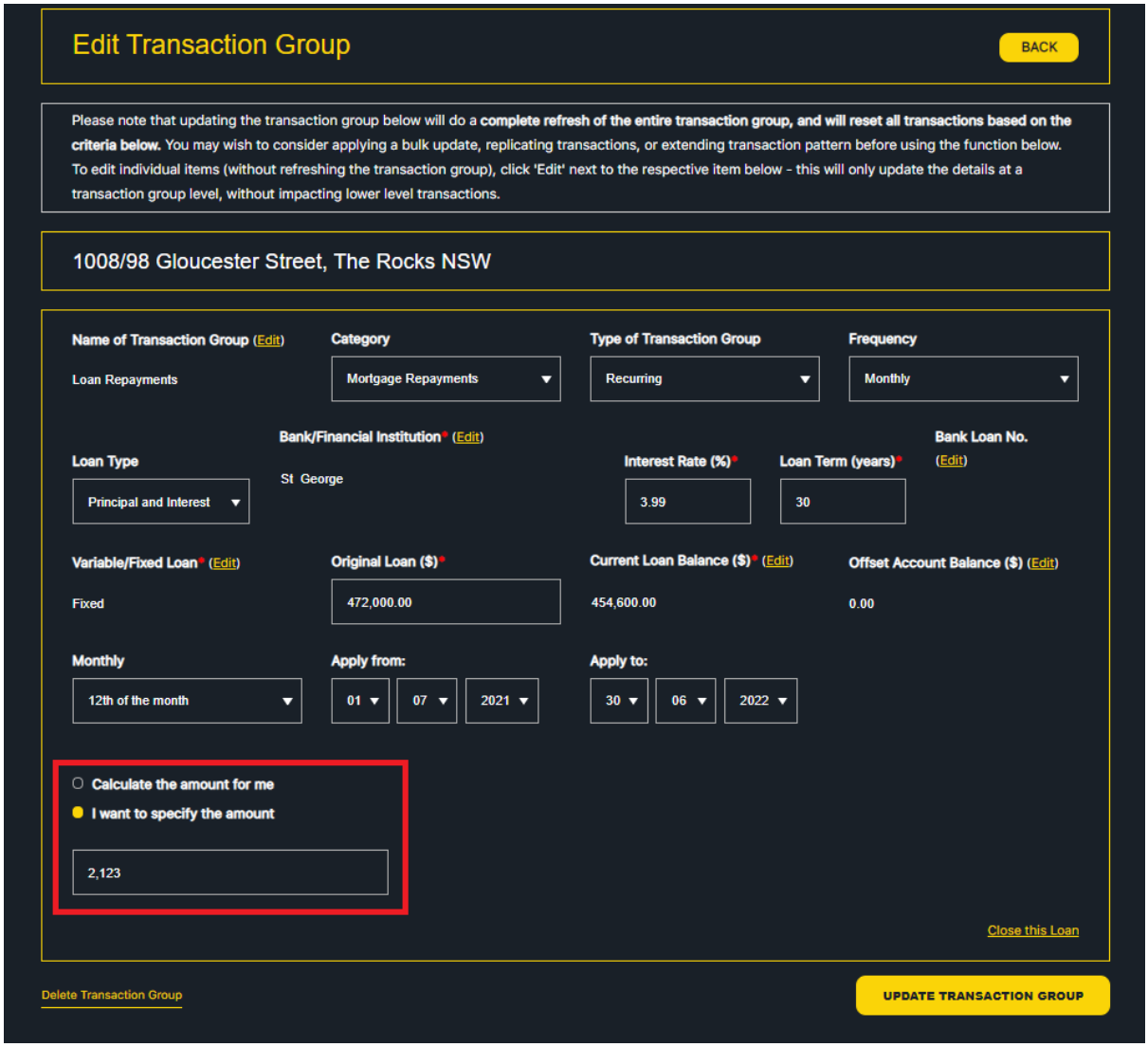


2. Click **Edit Transaction Group** in the top sub-navigation area when you arrive at the Edit Transactions page.

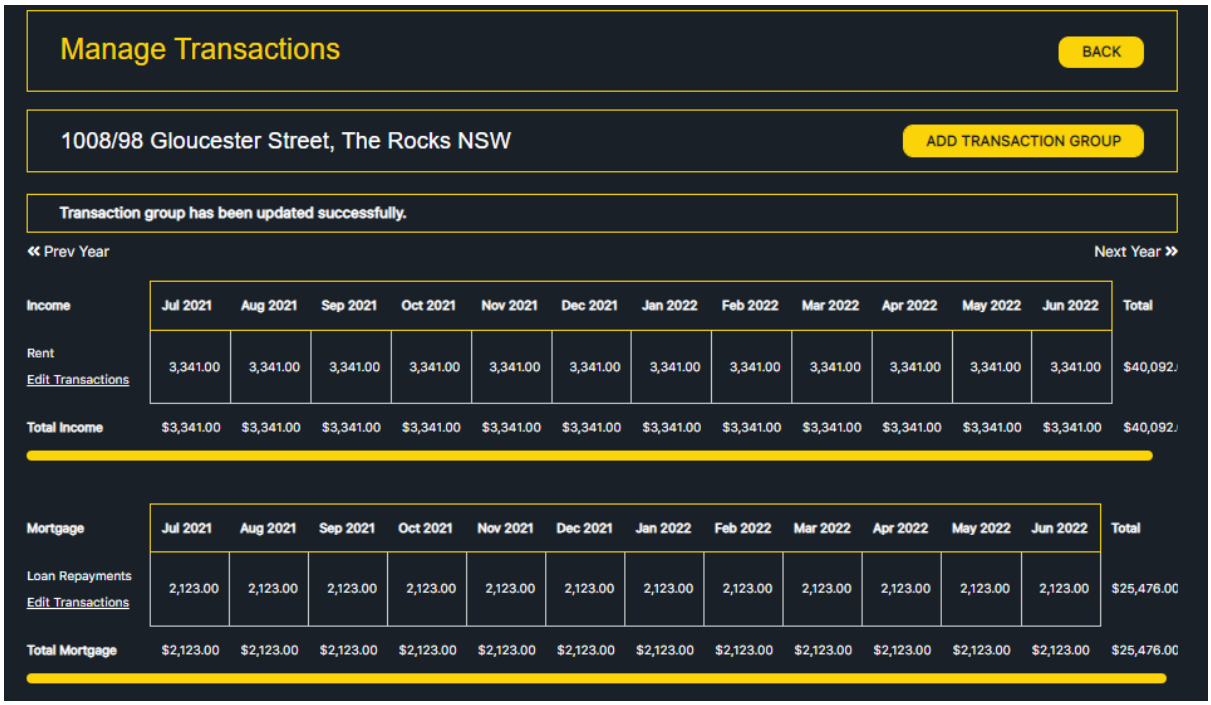


3. The system gives you the option to either automatically calculate your loan repayments, or explicitly specify your loan repayment amount – you can configure this by selecting one of the options shown in the section highlighted in red below. You also have the ability to specify the loan repayment frequency, 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.

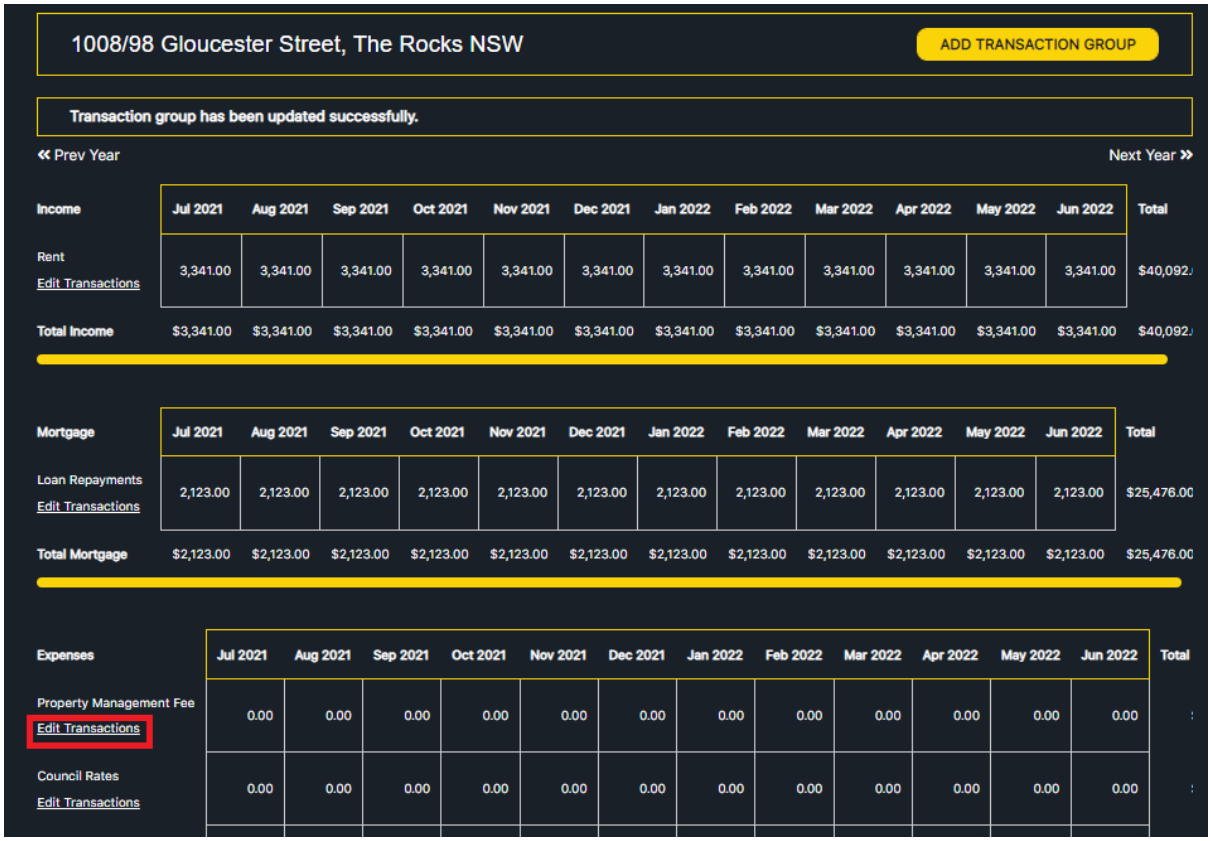


4. The Transaction Group will be updated, and you will arrive back at the Manage Transactions screen.

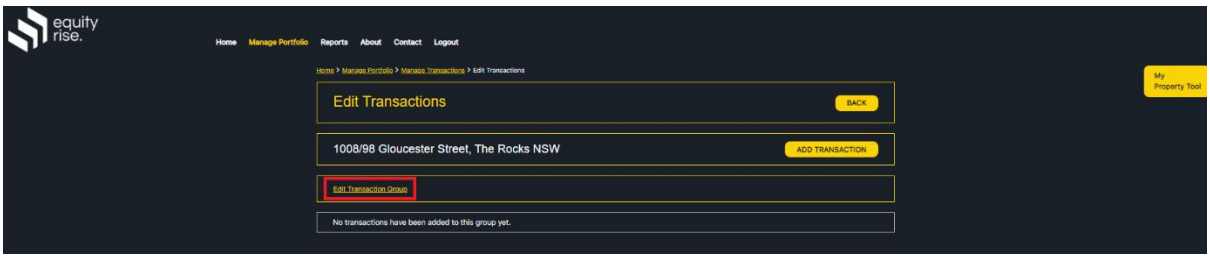


Auto-calculating Property Management Fees

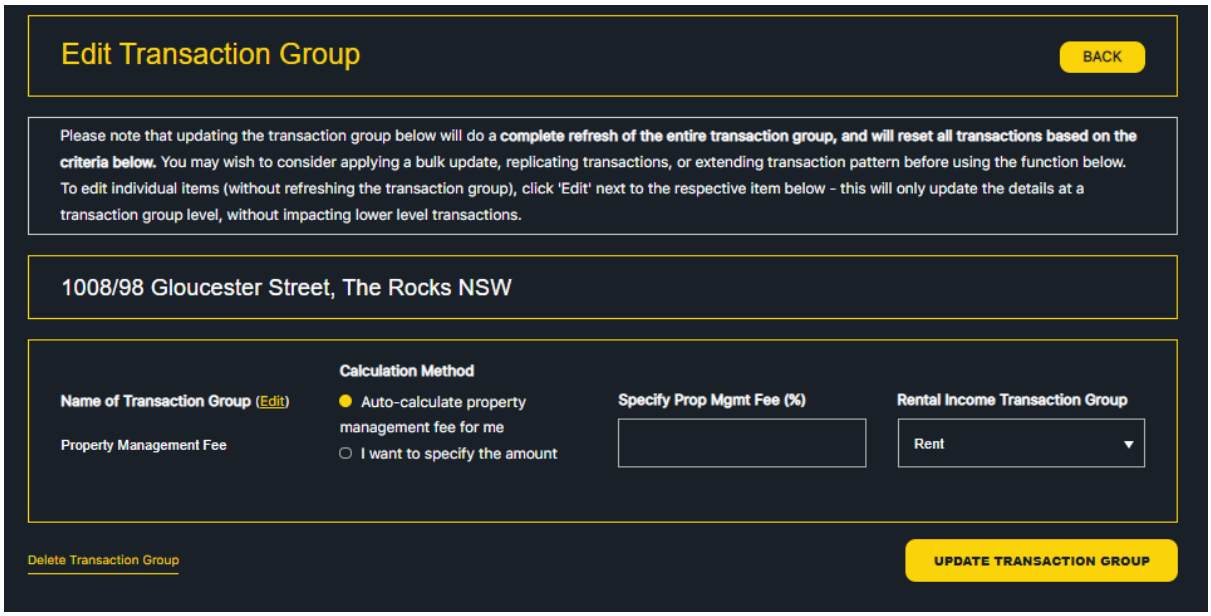
1. After adding a property, PropertyDirector automatically creates a placeholder transaction group in the Manage Transactions screen for 'Property Management Fee'. Click 'Edit Transactions' for the Property Management Fee transaction group.



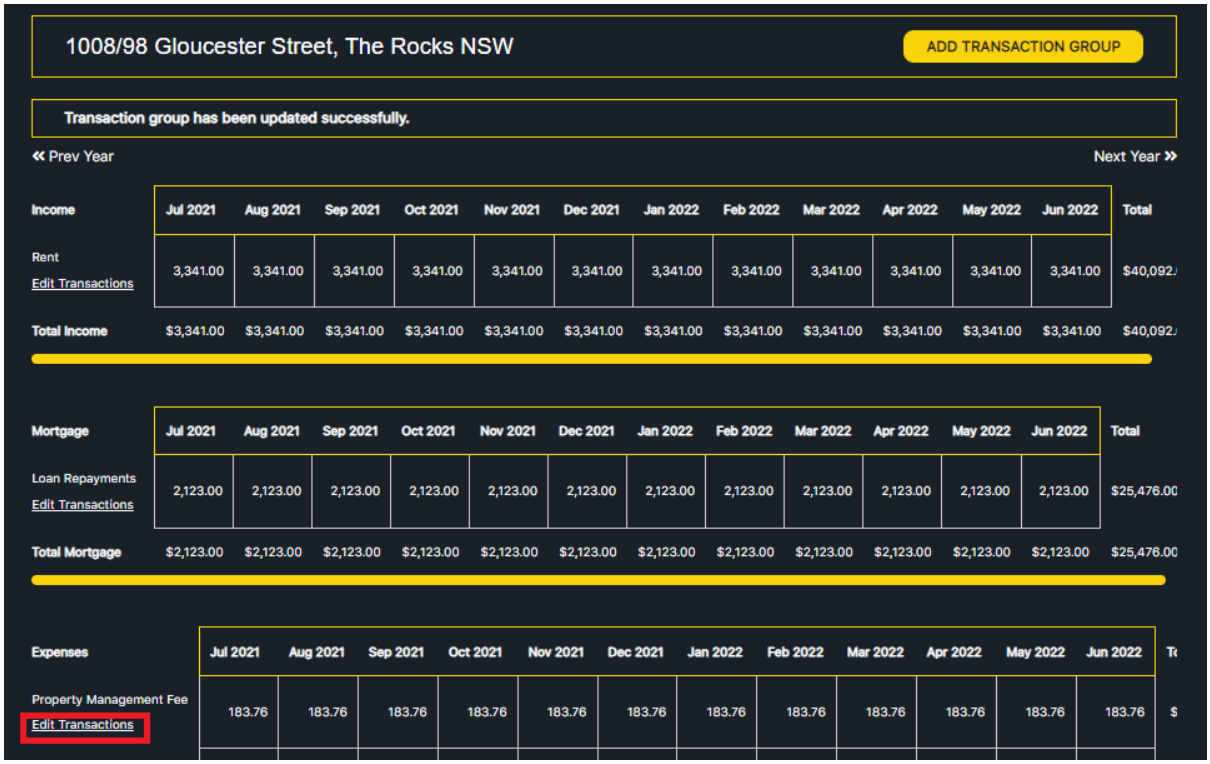
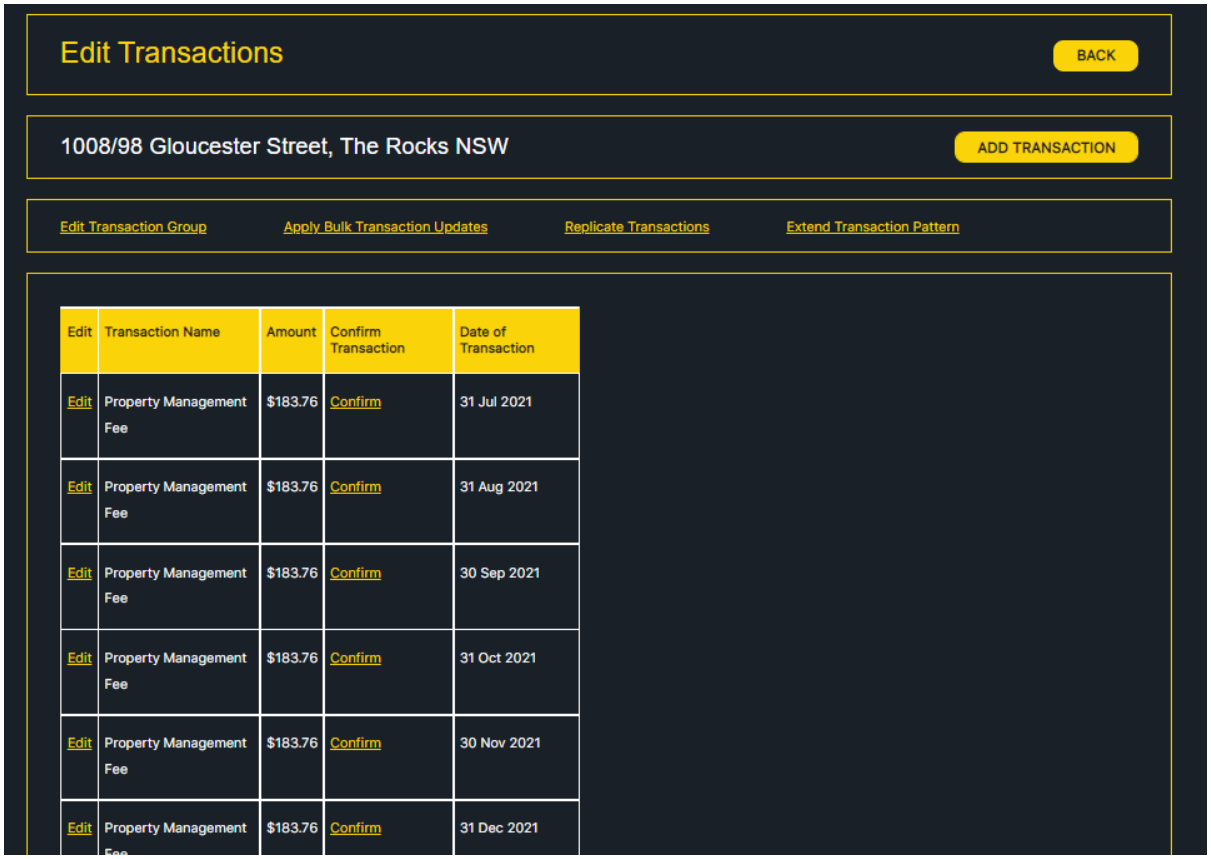
2. Click **Edit Transaction Group** in the top sub-navigation area when you arrive at the Edit Transactions page.



3. The Edit Transaction Group page will enable you to auto-calculate your property management fee, or specify the amount yourself. If you wish to auto-calculate your property management fees, click the 'Auto-calculate property management for me' option, then specify your property management fee percentage (e.g. 5.5%), and select the rental income transaction group you wish to use to calculate the fees. Click UPDATE TRANSACTION GROUP, then click 'Yes' for the popup.



4. The Property Management Fee transaction group will be updated, and transactions will be created automatically for property management fees. Click 'Edit Transactions' to review the 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.