

## 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													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	3,411.00	3,411.00	3,411.00	3,411.00	3,411.00	3,411.00	3,411.00	3,411.00	3,217.89	2,338.70	2,338.70	2,338.70	\$37,521.99
<a href="#">Edit Transactions</a>													
<b>Total Income</b>	\$3,411.00	\$3,411.00	\$3,411.00	\$3,411.00	\$3,411.00	\$3,411.00	\$3,411.00	\$3,411.00	\$3,217.89	\$2,338.70	\$2,338.70	\$2,338.70	\$37,521.99
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	2,288.00	2,288.00	2,288.00	2,288.00	2,288.00	2,288.00	2,288.00	2,288.00	2,288.00	2,288.00	2,288.00	2,288.00	\$27,456.00
<a href="#">Edit Transactions</a>													
<b>Total Mortgage</b>	\$2,288.00	\$2,288.00	\$2,288.00	\$2,288.00	\$2,288.00	\$2,288.00	\$2,288.00	\$2,288.00	\$2,288.00	\$2,288.00	\$2,288.00	\$2,288.00	\$27,456.00
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. You will arrive at the Add Transaction Group page.

Add Transaction Group													BACK
1008/98 Gloucester Street, The Rocks NSW													ADD TRANSACTION GROUP
Name of Transaction Group	Category	Type of Transaction Group	Frequency										
<input type="text"/>	Expense	Recurring	Monthly										
Amount (\$)	<input type="text"/>												
Monthly	Apply from:	Apply to:											
Last day of the month	DD	MM	YYYY	DD	MM	YYYY							

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. 3<sup>rd</sup> 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
<input type="text" value="Special Monthly Levy"/>	<input type="text" value="Expense"/>	<input type="text" value="Recurring"/>	<input type="text" value="Monthly"/>

Amount (\$)

Monthly

Apply from: | Apply to: ||  |  |  |  |  |  |  |

**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.

Strata/Body Corporate <a href="#">Edit Transactions</a>	2,374.54	0.00	0.00	2,374.54	0.00	0.00	0.00	2,374.54	0.00	0.00	2,374.54	0.00	\$9,498.16
Maintenance & Repairs <a href="#">Edit Transactions</a>	0.00	220.00	1,126.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$1,346.00
Other <a href="#">Edit Transactions</a>	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$50.00
GST <a href="#">Edit Transactions</a>	17.06	17.06	17.06	17.06	17.06	17.06	17.06	17.06	17.06	17.06	17.06	17.06	\$204.72
Admin & Sundries Fee <a href="#">Edit Transactions</a>	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	\$66.00
Special Monthly Levy <a href="#">Edit Transactions</a>	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
<b>Total Expenses</b>	\$3,152.90	\$990.21	\$1,669.11	\$3,102.90	\$769.91	\$543.11	\$728.36	\$3,144.45	\$543.11	\$728.36	\$3,144.75	\$543.11	\$19,060.28
<b>Net</b>	<b>\$-2,029.90</b>	<b>\$132.79</b>	<b>\$-546.11</b>	<b>\$-1,979.90</b>	<b>\$353.09</b>	<b>\$579.89</b>	<b>\$394.64</b>	<b>\$-2,021.45</b>	<b>\$386.78</b>	<b>\$-677.66</b>	<b>\$-3,094.05</b>	<b>\$-492.41</b>	<b>\$-8,994.29</b>

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
<a href="#">Edit</a>	Special Monthly Levy	\$350.00	<a href="#">Confirm</a>	3 Jul 2019
<a href="#">Edit</a>	Special Monthly Levy	\$350.00	<a href="#">Confirm</a>	3 Aug 2019
<a href="#">Edit</a>	Special Monthly Levy	\$350.00	<a href="#">Confirm</a>	3 Sep 2019
<a href="#">Edit</a>	Special Monthly Levy	\$350.00	<a href="#">Confirm</a>	3 Oct 2019
<a href="#">Edit</a>	Special Monthly Levy	\$350.00	<a href="#">Confirm</a>	3 Nov 2019
<a href="#">Edit</a>	Special Monthly Levy	\$350.00	<a href="#">Confirm</a>	3 Dec 2019