

Electronic Voting Operations Guide

A practical admin guide for preparing, opening, monitoring, closing, and reconciling electronic voting in Conventa.

Workflow

- Operating principles
- Before you start
- Create and review the draft
- Load participants and invitations
- Open voting
- Monitor submissions
- Close and hand off to Tallysheets
- Troubleshooting

Core Boundary

Electronic Voting collects and records submissions.

Tallysheets remains the official counting and final outcome workflow.

AGM / EGM / VOC / PropertyIQ / Tallysheets Sync

Operating Principles

Notices

Formal meeting documents and DOCX generation stay in Notices/Electronic Voting Builder.

Electronic Voting

Handles access codes, invitations, online submissions, receipts, monitoring, and backups.

Tallysheets

Handles countability, exclusions, paper/manual votes, final counting, and meeting outcomes.

Electronic votes are intentionally linked to the relevant lot owner or committee member record. This is not a secret ballot workflow.

Before You Start

- Meeting notice information is complete.
- Meeting type is correct: AGM, EGM, or VOC.
- Motions are complete and active where required.
- Office bearer nominees are loaded where applicable.
- Attachments are uploaded and visible from the voter page.
- Owners or committee members have been loaded from PropertyIQ.

- Electronic recipients have valid email addresses.
- Access codes have been prepared for every electronic recipient.
- Receipt settings are correct.

Create And Review The Draft

1. Build The Draft

Open Electronic Voting Builder. Enter or confirm the property, CTS, meeting type, meeting date/time, financial year end, module, CSLE/ISLE details, and motion information.

Generate the DOCX notice if required, then create the electronic voting draft when the ballot content is ready for review.

2. Review Ballot Details

Open Ballot Details for the draft. Review the title, meeting date/time, motions, notes, resolution types, nominees, and attachments.

Use TinyMCE to edit motion and note wording. Tables can be edited directly without needing HTML knowledge.

For levy and insurance motions, confirm table formatting before opening voting. Voters see the same rendered content on the public voting page.

Participants And Email Invitations

3. Load Participants From PropertyIQ

AGM/EGM	Use Load Lot Owners From PropertyIQ.
VOC	Use Load Committee Members From PropertyIQ. Conventa filters to voting committee positions such as chair, secretary, treasurer, ordinary member, and common combined variations.

Loading participants replaces draft participant rows for that ballot only. It does not create votes, issue access codes, send emails, or open voting.

4. Review Email Eligibility

Open Lot Owners & Email Invitations or Committee Members & Email Invitations.

- Review names, lot/unit details, CSLE/ISLE, and email addresses.
- For VOC ballots, untick Send Invite for committee members who should not receive an electronic invitation.
- Blank email addresses cannot vote electronically, but can still be handled by paper/manual vote in Tallysheets.

5. Prepare Access Codes

Click Prepare Electronic Access Codes. Codes use the format XXXX-XX-XXXX and are stored encrypted.

Preparing codes does not send invitations or open voting. Treat access codes and voting links like passwords.

Open Voting And Send Invitations

6. Open Voting

Use the Voting Status card or header action to open voting.

Opening voting checks readiness, requires active motions and prepared access codes, creates or links the Tallysheets meeting, loads owners/motions/nominees into Tallysheets, and makes public access codes usable.

7. Send Email Invitations

After voting is open, use Send Email Invitations. Invitations include the ballot details, access code, voting link, and password-style handling warning.

Invitations are sent only to prepared, unsent electronic voters with valid email addresses.

Monitor Submissions

Use Results & Reconciliation to monitor progress. This area is for operational confidence and audit support, not final vote counting.

Submission Counts Total, submitted, not submitted, paper/manual, and potentially uncountable counts.	Submitted Responses One row per submitted electronic participant, with motion responses and nominee selections.	Audit & Backups Readable activity history plus JSON and CSV backup exports.
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Response Receipts

Receipt settings can send confirmations to the lot owner or committee member, BCM, and admin@dcsmanagement.au.

If a receipt was not received, use Resend Receipt beside the submitted participant row. Resend uses the current receipt settings.

Reset Access Code

Use Reset Code only when a replacement submission is required. Resetting creates a new code and clears that participant's previous Electronic Voting responses and linked Tallysheets votes.

Close Voting And Handoff

8. Close Voting

Use the Voting Status card to close voting. Closing stops public access codes from accepting submissions, while keeping admin review available.

Closing warnings identify items that still need attention in Tallysheets. They do not always mean voting cannot close.

9. Complete Tallysheets

After voting closes, complete the remaining work in Tallysheets:

- review synced electronic votes
- enter paper/manual votes
- apply financial and eligibility exclusions
- manage representation
- finalise countable and uncountable votes
- determine meeting outcomes

Exports And Backups

JSON Backup	Best for complete structured backup. Includes ballot data, participants, motions, votes, nominees, and audit information.
CSV Backup	Best for spreadsheet review. Includes metadata, summary, definitions, participants, manual follow-up, votes, nominee votes, and audit rows.

Troubleshooting

Invitation Email Was Not Received

- Confirm voting is open.
- Confirm the participant has a valid email address.
- Confirm access codes have been prepared.
- Confirm the invitation was not already sent.
- Check SMTP/mail logs.

Receipt Email Was Not Received

- Confirm the participant submitted successfully.
- Confirm receipt settings include the intended recipient.

- Use Resend Receipt.
- Check SMTP/mail logs.

Access Code Does Not Work

- Confirm the ballot is open.
- Confirm the access code was copied exactly.
- Confirm the participant has electronic access enabled.
- Confirm the code has not already been submitted.
- Reset the code if a replacement submission is required.

Votes Do Not Appear In Tallysheets

- Confirm the ballot is linked to a Tallysheets meeting.
- Confirm the participant has submitted.
- Confirm the motion exists in the linked Tallysheets meeting.
- Review audit activity and the Submitted Responses grid.

Current Boundaries

Electronic Voting currently does not:

- determine final pass/fail outcomes
- replace Tallysheets
- apply final financial exclusions before voting closes
- handle paper/manual vote entry
- replace Notices for formal notice generation
- replace Minutes generation

This separation is intentional. It keeps voting collection inside Conventa while preserving Tallysheets as the official result workflow.