

PropertyIQTM

PIQ+ Task Centre
Invoice Approvals

Quick Reference Guide

Version 1. June 2026





Description

- This is a Quick Reference Guide for **PIQ+ Task Centre: Invoice Approvals**.
- Task Centre is a centralised hub for managing, tracking and completing tasks. The first task type available in Task Centre is invoice approvals.
- You can configure invoices for internal and external approval in PIQ and then track every step from start to finish in Task Centre.



What you'll learn

This guide will assist you to navigate the following:

1. [Invoice process flow](#)
2. [How to setup invoice approvals](#)
3. [How to trigger internal approval for invoices](#)
4. [How to trigger external approval for invoices](#)
5. [View invoice details & activity feed in PIQ+](#)

Additional information included:

- [Important system behaviour](#)
- [Permissions](#)



Who should read this

- Users responsible for managing invoices
- Strata Managers



Read time

9 minutes



Invoice becomes visible in the Portal

Building **enabled** for Portal invoice approvals

Invoice **uploaded** in PIQ

Select **invoice options** for hold and approvals

Internal approval is required if 'Internal Approval' ticked

Once complete, 'Approval' checkbox manually unticked

(if applicable)

Proceeds to **External** approval if 'External Approval' ticked

Requires over 50% of approvers to approve in Portal

Track progress in **PIQ+**

(if applicable)

Invoice **approved** and ready for payment

'External approval' checkbox automatically unticked in PIQ once approved

Invoice **paid** in your next payment run

Any invoices with 'Hold' ticked will remain on hold until you manually remove the hold

Hold

Approval

External Approval

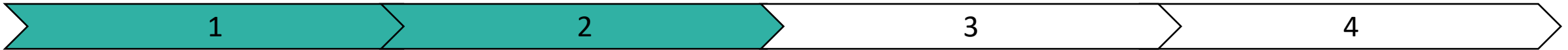
Approving User

Hold
Holds invoice for payment. You can still send for approval in Portal whilst ticked.

Approval
Requires internal review and approval. Optionally nominate an Approving User.

External Approval
Once internal approval complete (if applicable), sends to Portal for committee approval (the nominated 'external approvers').

There are 4 steps to configure and setup invoice approvals in your PropertyIQ and Portal. Below are steps 1 and 2.



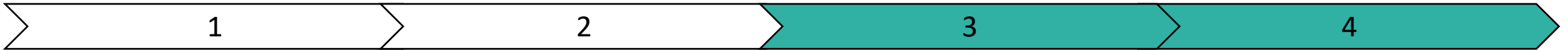
1 **Enable on the building:** Once PIQ+ Task Centre has been activated in your PIQ, you will need to enable each applicable building for invoice approvals. Go to the building card in PIQ and tick the checkbox 'Invoice Approvals In Portal'.

2 **Setup committee members as external approvers:** For each member authorised to approve invoices for the building, go to *Building card > Info tab > Committee* and on the committee member card ensure the 'External Approver' checkbox is ticked.

! **IMPORTANT NOTE**

- Buildings **not enabled** for 'Invoice Approvals In Portal' will continue to use the current external approval flow in PIQ, where each invoice is emailed to approvers using the standard email template.

There are 4 steps to configure and setup invoice approvals in your PropertyIQ and Portal. Below are steps 3 and 4.



3

Committee members are registered for Portal: For each member that's been setup as an external approver, ensure they're registered for Portal under *Utilities>Portal Control Panel>Register Committee Members*.

Registered members will have a tick ✓ in the *Registered* column.

To register a member, search, select and register them using the *Register* button.

Registered	S/Plan	Building Name	Name	Position	Email	Lot Owner
✓		Sample PLC	Amos	Member		✓
✓		Sample PLC	Holly Trik	Chairperson		✗
✓		Sample PLC	John Smith	Chairperson		✗
✓	1	Sample PLC	John smith	Chairperson		✗

4

Enable 'Approvals' page in your Portal: Log in to the PIQ Portal as an administrator.

Go to *Configuration>Committee* and enable the 'Approvals' page. This is where your committee go to view and approve their invoices.

Note: Only buildings with portal approvals enabled (see Step 1) will see the Approvals page in Portal.

PropertyIQ Configuration

Global

- Building page
 - Property Info
 - Strata Plan No
 - Address
 - Type
 - ABN
 - GST Registered
 - Number of Lots
 - Financial year start
 - Levy Frequency
 - Insurance
 - Insurer
 - Broker
 - Policy Number
 - Policy Premium
 - Policy Expiry
 - Strata Manager Contact Info
 - Onsite Manager Contact Info
 - Caretaker Contact Info
 - Committee/Council Members
- Financial page
 - Balances
 - Detailed Financial Reports
- Meetings page
 - Upcoming Meetings
 - Download Agenda
 - Previous Meetings
 - Download Minutes
- Document page
 - Building category
 - Show documents from member's appointment date
 - Lot category
 - Show documents from member's appointment date
 - Financial category
 - Show documents from member's appointment date
 - Meetings category
 - Show documents from member's appointment date
 - Insurance category
 - Show documents from member's appointment date
 - General category
 - Show documents from member's appointment date
- Approvals page
- My Profile page
 - Edit delivery preferences

1

Go to *Processing>Supplier Transactions* or *Processing>Supplier Payments* and open the invoice requiring internal review and approval.

Tick the **Approval** checkbox.

Note: Skip this step if internal approval is not required.

2

Optional: You can also select a user from the **Approving User** dropdown to assign the invoice to this person for the internal review.



TIPS

- You can tick **both** 'Approval' and 'External Approval' at the same time and the invoice will proceed through each step in sequence (being Internal Approval THEN External Approval).
- While an invoice has 'Approval' ticked, the committee **cannot** see or approve the invoice in **Portal**.
- An invoice marked for internal and/or external approval will be visible in **PIQ+ Task Centre**.

The screenshot shows the 'Supplier Transactions' interface. On the left is a preview of an invoice for 'Green Thumb Gardening' with invoice #123456, due date 12 October, 2025, and invoice date 15 October, 2025. The main form on the right includes fields for Supplier, O/Corp, Work Order, Reference, Transaction Date, and Due Date. The 'Approval' checkbox is checked and circled with a red box and a '1'. The 'Approving User' dropdown is set to 'Augustine Mock' and circled with a red box and a '2'. A table below shows a contribution schedule for Landscaping with a total of \$500.00. At the bottom, there are buttons for 'Charge Owner', 'Charge Debtor', 'Reimbursement', 'Pay Now', and 'Pay Later'.

1

Go to *Processing>Supplier Transactions* or *Processing>Supplier Payments* and open the invoice requiring external approval by committee.

Tick the **External Approval** checkbox.

Note: Skip this step if external approval is not required.

2

Select **Yes** on the confirmation popup to continue. This will send the invoice to Portal for committee approval.



TIPS

- You can tick **both** 'Approval' and 'External Approval' at the same time and the invoice will proceed through each step in sequence (being Internal Approval THEN External Approval).
- While an invoice has 'Approval' ticked, the committee **cannot** see or approve the invoice in **Portal**.
- An invoice marked for internal and/or external approval will be visible in **PIQ+ Task Centre**.
- See '[Important system behaviour](#)' for more detail.

The screenshot displays the 'Supplier Transactions' interface in PropertyIQ. The main form shows an invoice for 'Green Thumb Gardening' with invoice number #123456, due date 12 October, 2025, and invoice date 15 October, 2025. The 'External Approval' checkbox is checked and highlighted with a red box and a circled '1'. A confirmation popup is overlaid on the form, asking 'Do you want to continue?' with 'Yes' and 'No' buttons. The 'Yes' button is circled with a '2'. The interface also shows a table of invoice items with columns for Details, Amount, and Account.

IMPORTANT NOTE

- Once a building has invoice approvals in Portal enabled, the previous behaviour of sending an email to external approvers from PIQ is no longer available (instead portal notifications are sent based on their preferences).

- 1 Go to **Task Centre** to view the list of invoice approval tasks.
- 2 By default, the list is filtered by invoices **In progress** for buildings managed by the logged in PIQ+ user (if the user is a Manager).
- 3 The list is **sorted** by the newest created.
- 4 Use the **Assigned to** column to see who needs to approve the invoice.
- 5 Fully paid or cancelled invoices have a status of **Completed**.
- 6 Click on a task to open the details. The **Activity** feed panel provides a chronological history of all actions on the invoice.



TIP

- Invoices assigned to you (the logged in user) will have an extra status of **Awaiting you**.

Cannot see or access PIQ+ Task Centre in your PIQ?

As a new feature, PIQ+ Task Centre must firstly be enabled by PIQ Support.

If you do not have access to PIQ+, please contact us at support@propertyiq.com.au and request to activate it.

If you have PIQ+ Task Centre enabled in your PIQ and a user cannot see it, you may need to check their user permissions. See ['Permissions'](#) for more detail.

Some invoice types are not visible in PIQ+

The following invoice types are not currently available or visible in PIQ+ Task Centre:

- Credit notes
- Invoices where the supplier is the default system managing agent (folio or global)
- Invoices where the supplier is the default system tax creditor (ATO).

Pre-existing invoices with 'External Approval' already ticked, do not automatically use new invoice approvals flow in Portal

For pre-existing invoices in PIQ (created before building setting was enabled) that already have 'External Approvals' option ticked will **not** automatically appear in PIQ+ Task Centre or Portal. Only invoices that have 'External Approval' option ticked after the building setting is enabled will use the new external approval flow.

To initiate the new external approval flow on a pre-existing invoice, you can untick and re-tick the 'External Approval' checkbox on the invoice. This will then trigger the new approval flow in PIQ+ Task Centre and Portal.

Sequential approval flow – Internal THEN External

Please note an invoice will proceed through each step of the approval flow in sequence. If you mark an invoice requiring **both** 'Approval' and 'External Approval', internal approval is required **BEFORE** external approval. While an invoice has 'Approval' ticked, the committee **cannot** see or approve the invoice in Portal.

Access to PIQ+ Task Centre will be determined by the user permissions set in PropertyIQ under *Utilities>Security menu*.

If you think you have the wrong permissions, please contact your administrator to update your role permission in PIQ.

View tasks in PIQ+

Users with: Utilities> Security> Role> <u>Processing – Supplier</u> <u>Payments</u>	View	View <i>Task Centre</i> menu in PIQ+ and all invoice approval tasks.
	<i>Note:</i> Additional user permissions will be added as new functionality in PIQ+ Task Centre is released.	

User data access restrictions

Users with: Utilities> Security> Role> <u>Data Access Restriction</u>	No Data Access Restriction can work with tasks belonging to global and all folios.	
	Restrict to Data In Users Folios can only work with tasks under global and folios they have access to. For example, if a user has access to Folio A and B, they will only have access to tasks belonging to global, Folio A and Folio B.	
	Restrict to Data in Buildings Managed by User can only work with tasks under global and folios with buildings they have access to. For example, if a user has access to Building A and B of Folio X and Building E of Folio Y, they will only have access to tasks belonging to Global, Folio X and Folio Y.	



TIP: If your administrator has updated your permissions, you will need to logout and then login again for those permissions to reflect in PIQ+.