Release Notes Version 142.2-143.2

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SUMMARY

Major Features

Buildings

1. Two new Tick Boxes in the Building Card

Because some Buildings may resolve not to follow the standard process of debt collecting - sending arrears notices, final notices and legal notices - and may choose to do their own Debt Collecting, you will now have the ability to nominate which option the Building has chosen. File> Buildings>Building Card

Debt Collection

- This box will be ticked by default when you add a new Building. It means that this Building will be included when you process a Due Notices run of Arrears, Final or Legal Notices. If a Building has resolved not to conduct debt collection you can untick the box so that Building will *not* be included when running these notices.

Payment Plan

- If Debt Collection is ticked, you will now have the option to tick Payment Plan
- If the Payment Plan option is ticked a statement will be added to the levy notices for that Building advising the lot owners about payment plans. The statement is set up in Utilities>Settings>Application Settings**.**
- To incorporate the Statement Plan message, you will need to edit your Notice Templates to include the new merge field {{&Payment_Plan_Statement}}

2. Insurance Claims Tab

- You can now view, edit and add insurance claims from the Building Card – Insurance Tab. File>Buildings>Building Card>Info>Insurance

Meetings – New Features

3. Notes Tab
    - The Meeting Card now has a new Notes Tab where you can record Pending and completed notes, set reminders for Pending Notes and print notes. To Do>Meetings>Meeting Card
4. Alerts Tab
    - The Meeting Card now has a new Alerts Tab, where you can record alerts that relate to the meeting. You can set an Alert to be triggered when the Meeting card is opened To Do>Meetings>Meeting Card
5. Documents Tab
    - The Meeting Card now has a new Documents tab where you can view, print, email and download documents that have been saved against the meeting. For example, Meetings Motions Reports, Meeting Minutes Reports and Motions Attachments. To Do>Meetings>Meeting Card
6. Generating more items from the Meeting Card
    - You can now generate the following items from the Meeting Card:
        - Voting Sheet. To Do>Meeting>Meeting Card
        - Meeting Data Source Export. To Do>Meeting>Meeting Card

Lot Owners

7. New Delivery options
    - There are now new delivery options for Lots/Owners so that Meeting Notices can be sent to a different recipient to the one that receives General Correspondence**.** File>Lots/Owners>Lot Owner Card

8. New data entry field - Mobile number for Proxy

- When creating a new proxy from the Lot Owners Info Tab, you can now enter a mobile number. File>Lots/Owners>Lot Owner Card>Info Tab

	Insurance Claims 9. Insurance Claim Card – you can now choose policies that have expired when attaching a policy to an insurance claim. To Do>Insurance Claims>Insurance Claim Card 10. If an Insurance Claim is attached to a Work Order, The Insurance Claim Documents Tab now shows all documents that have been attached to the Work Order. To Do>Work Orders>Work Order Card (including any Supplier Invoices) Adjustments 11. the Adjustments function now has a new option – Levy Maintenance. This release includes the first stage of this function – the ability to view levies in bulk. You can now sort and filter all levies for a Building. Processing>Adjustments>Levy Maintenance
Other Features	12. Settings. If you have ticked to include Company Details on your documents Headers in Utilities>Settings>Application Settings, then you can now choose whether or not you want the company headings to show when printing cheques. Utilities>Settings>Bank Settings 13. Auto Increased Management fees – the program will now check for auto increases and apply them prior to a Fee Schedule run being conducted. NOTE: This is a change in program behaviour. If you use Auto Increase and you would like further information, please contact Support. 14. Credit Note Improvements – credit notes can now be cancelled by clicking on the supplier ledger on the item to open the supplier transactions page, and then clicking on Delete 15. When exporting Building information from the Building Screen, there is a new column to include the Insurance Broker name

Program Improvements and Bug Fixes

- Meeting Start End Times – fixed an issue where the meeting end time was getting picked while the start date and time was in focus. The set Meeting End date/time will now only when the start date/time loses focus. To Do>Meetings>Meeting Card
- An issue where Insurance Policy Documents were not showing once an Endorsement Document had been added to the Insurance Policy has now been fixed. File>Buildings>Building Card>Info>Insurance
- An issue where type was overlapping on the Owner list report has been fixed. End of Period>Reporting>Lot>Owner List
- An issue where an “Internal Server Error” message was appearing when saving a Building that has an Agency Agreement end date but no start date, has been fixed. File>Building>Configure Charges
- An issue where Budget Reports were showing Lots in order of their ID, rather than in Lot Order, has been fixed. File>Building>Budget>Print.
- An issue where Fund Management Reports were showing Lots in order of their ID, rather than in Lot Order, has been fixed. File>Buildings>Financial Reports>Fund Management
- An Issue where changing the end date of an Agency Agreement does not always update the Diary has been fixed. File>Building>Configure Charges
- Improved cross referencing when the program creates a CRN (DEFT) number for a Debtor. The program will now search across Lots as well as Debtors to ensure there are no clashes. Any existing clashes will be found and fixed automatically
- An issue where Debtor Transaction were not being included in the audit trail report has been fixed. End of Period>BAS>Report. Note, this is the first stage of this fix and does not include debtor credit receipt transactions

DETAILED SCREENSHOTS

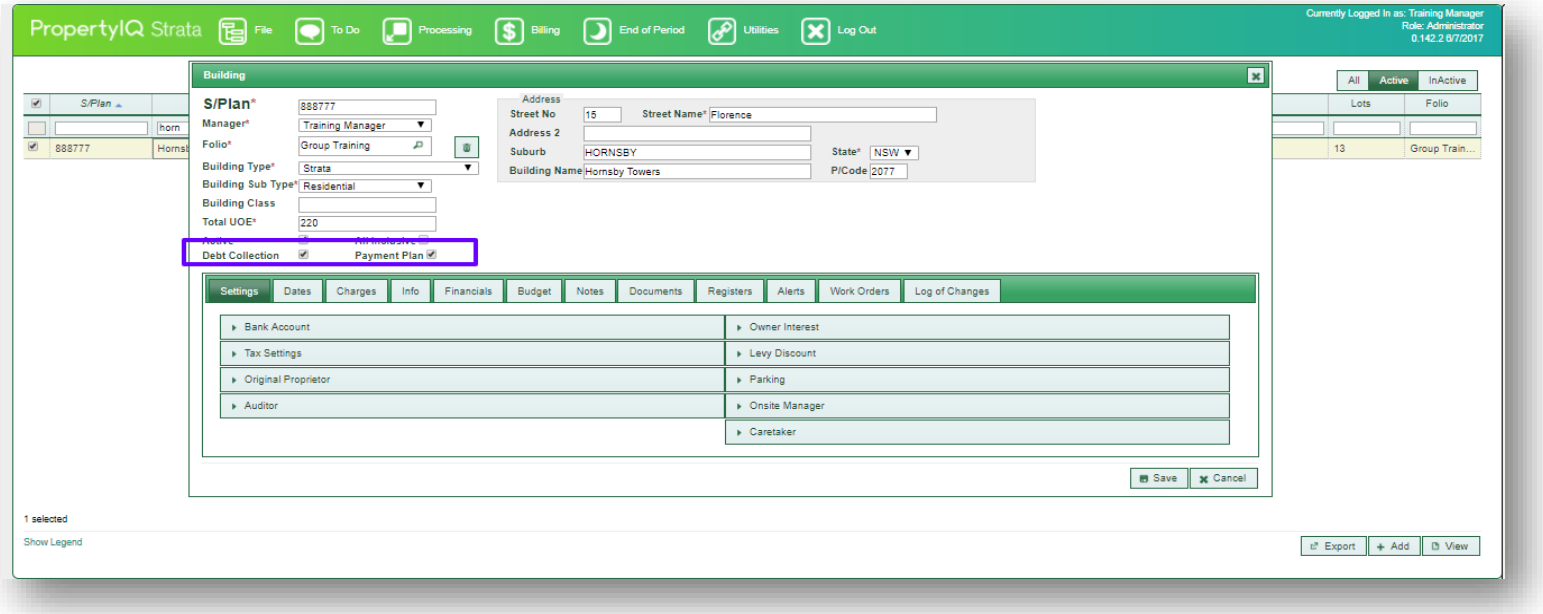
ITEM 1. BUILDING CARD – NEW TICK BOXES

Debt Collection

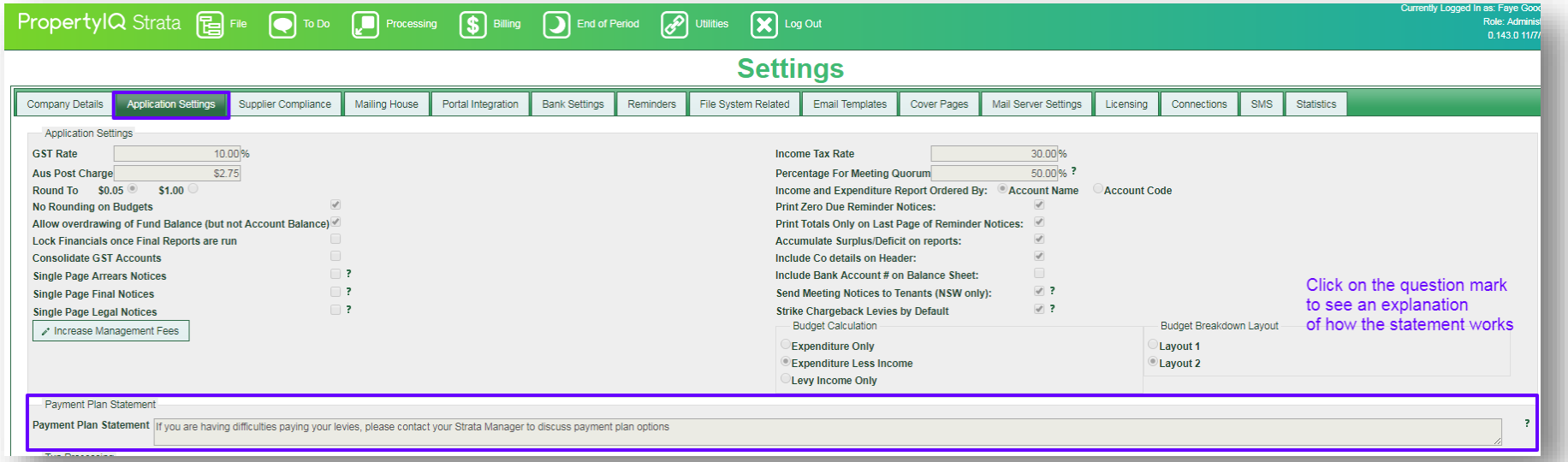
- This box will be ticked by default when you add a new Building. It means that this Building will be included when you process a run of Arrears, Final or Legal Notices. If a Building has resolved not to conduct debt collection you can untick the box so that Building will *not* be included when running these notices.

Payment Plan

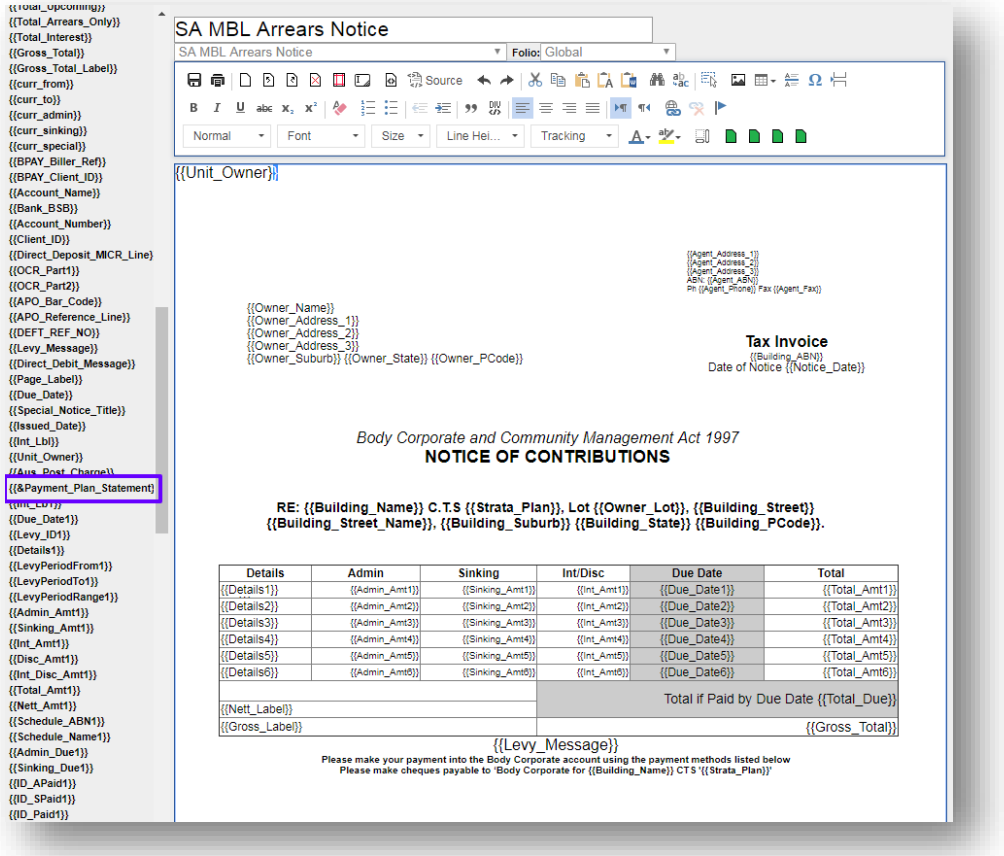
- If Debt Collection plan is ticked, you will now have the option to tick Payment Plan
- If the Payment Plan option is ticked a statement will be added to the levy notices for that Building advising the lot owners about payment plans.



The Payment Plan Statement is set up in Utilities>Settings>Application Settings

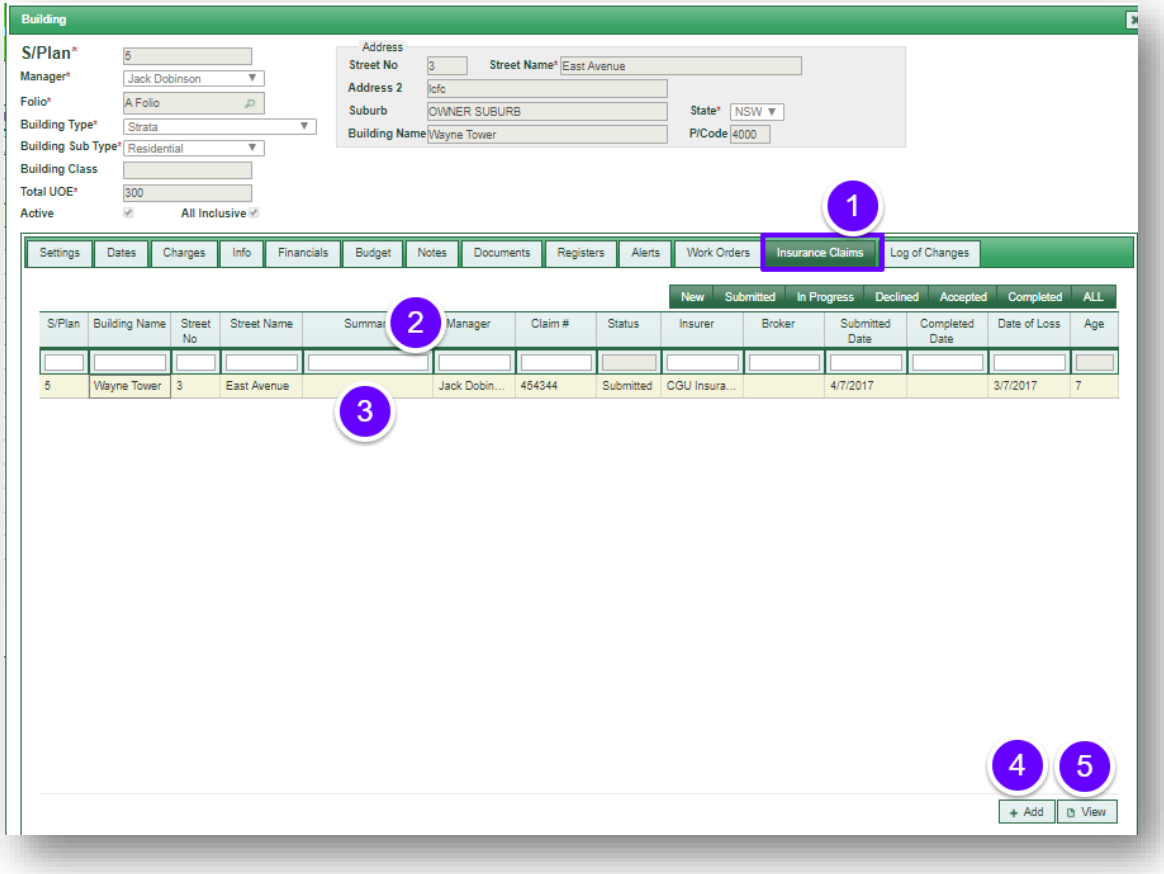


The new merge Field then needs to be added to your Notice Templates



ITEM 2. BUILDING CARD – NEW INSURANCE CLAIMS TAB

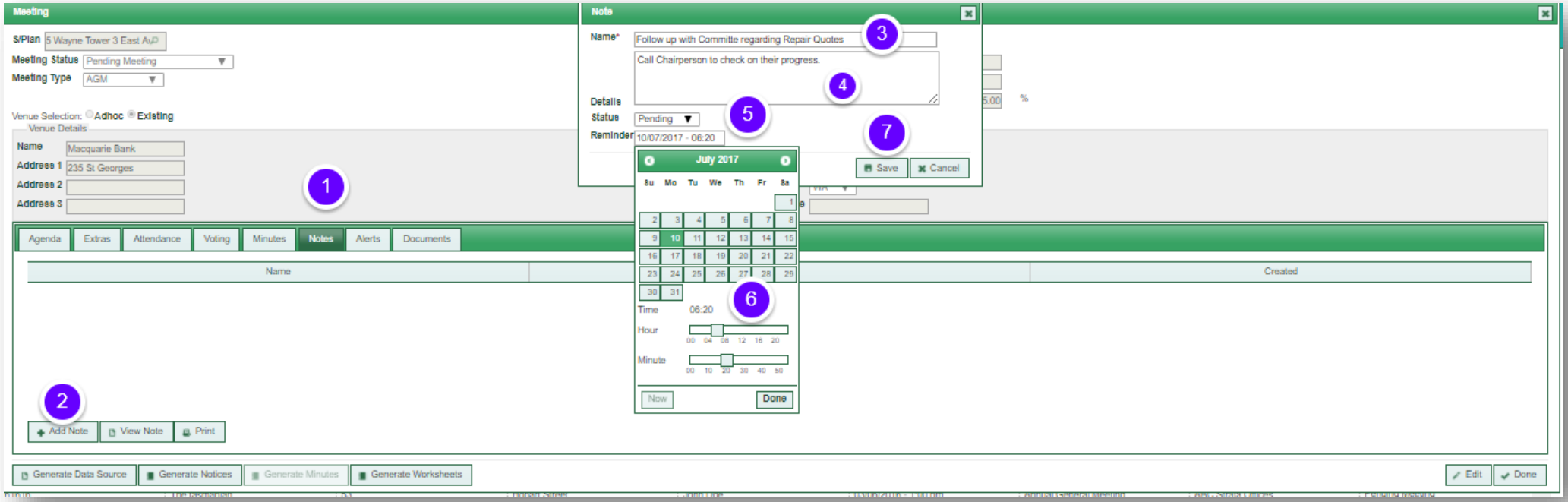
1. From the Building card, go to the Insurance Claims Tab
2. You can type some key letters in any of the empty boxes on the top line to refine your search
3. Click on an insurance claim to highlight it and then double click to open it
4. Click on the +Add button to add a new Insurance Claim for the Building
5. Click on the View Button to view a claim that you have highlighted on the screen



ITEM 3. MEETINGS NEW FEATURE - NOTES TAB

The Notes Tab allows you to record notes and create reminders that relate to the meeting.

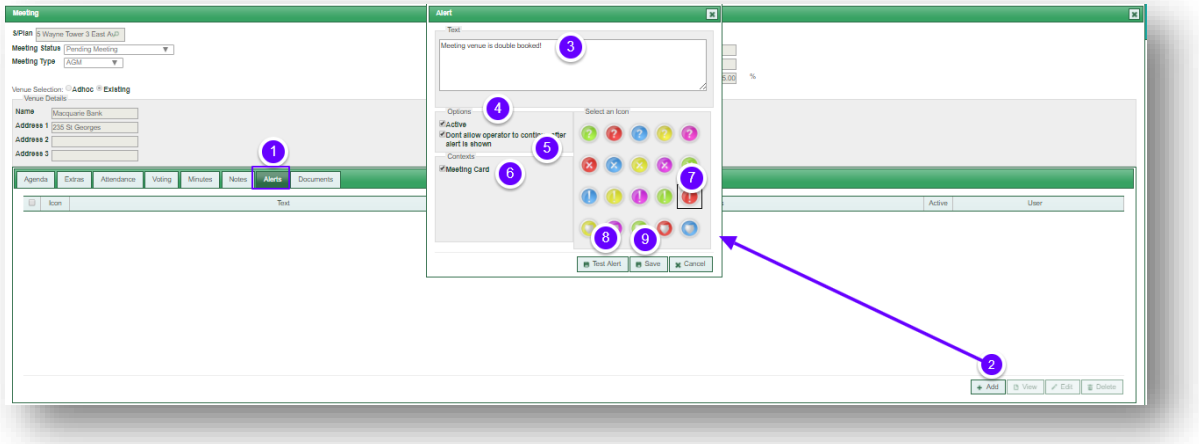
1. To create a new Note, go to the Notes Tab in the Meeting card
2. Click on Add Note
3. Type a description for the Note. This is what you will see when the note appears in your diary
4. Type the details of the note. You will see this when you open the Note
5. The Status of the Note will default to pending but you can choose Completed from the dropdown list if you just want to record and item that has already taken place
6. If you selected pending, click in the Reminder box to open the Calendar. You will then be able to select a date from the calendar and a time, by using the slider.
7. Click Save to save your Note.



ITEM 4. MEETINGS NEW FEATURE – ALERTS TAB

You can add alerts that will pop up when specified actions are performed.

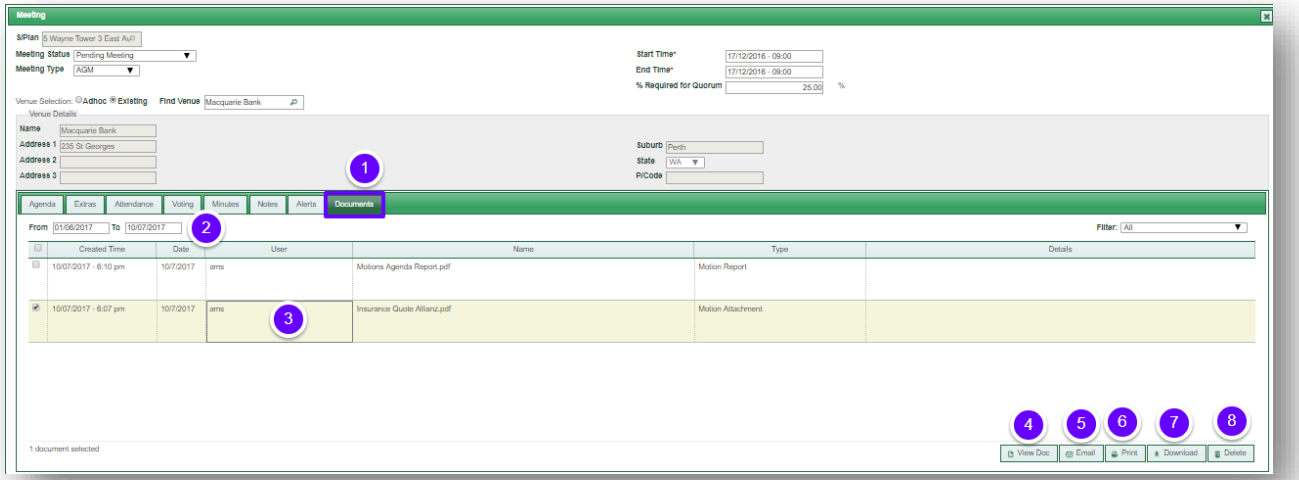
1. Go to the Alerts Tab in the Meeting Card
2. Click +Add to start adding a new alert
3. Type the text you want to appear when the alert is triggered
4. The Active Box will be ticked by default
5. Click here if you want to stop the operator from continuing once the Alert is activated
6. Click here to trigger whenever the operator opens the Meeting Card
7. Select the icon you want to appear whenever the alert is triggered
8. Click here to test the appearance of the alert
9. Click here to save the Alert



ITEM 5. MEETINGS NEW FEATURE – DOCUMENTS TAB

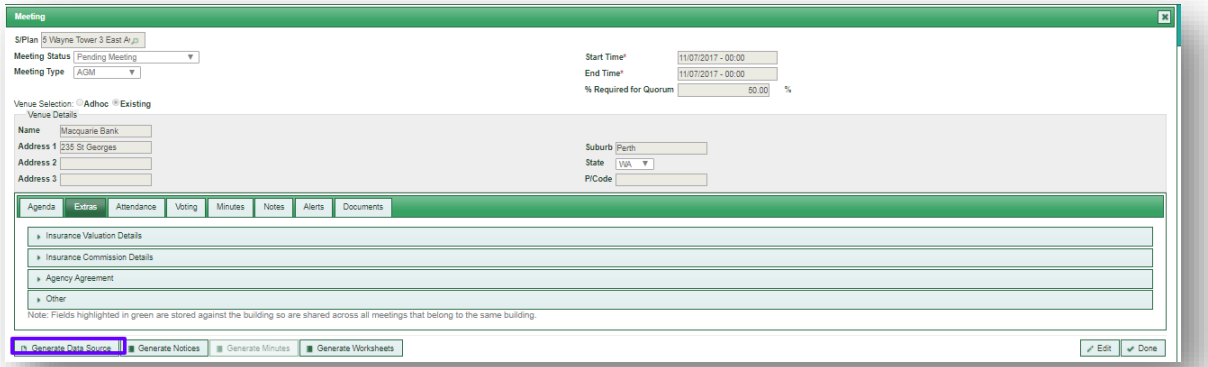
The Documents Tab shows all documents that have been attached to the Meeting. This includes any Motion attachments, Meeting Notices or Minutes.

1. From the Meeting Card, go to the Documents Tab
2. You can select a date range by clicking on the boxes to open the calendar
3. Click on a Document to highlight it on the screen
4. Click View Doc to view a Document that you have highlighted on the screen. This opens a PDF in a new tab
5. Click Email to Email a Document that you have highlighted on the screen, (see details below)
6. Click Print to print a Document that you have highlighted on the screen
7. Click Download to download a Document that you have highlighted on the screen
8. Click Delete to delete a Document that you have highlighted on the screen

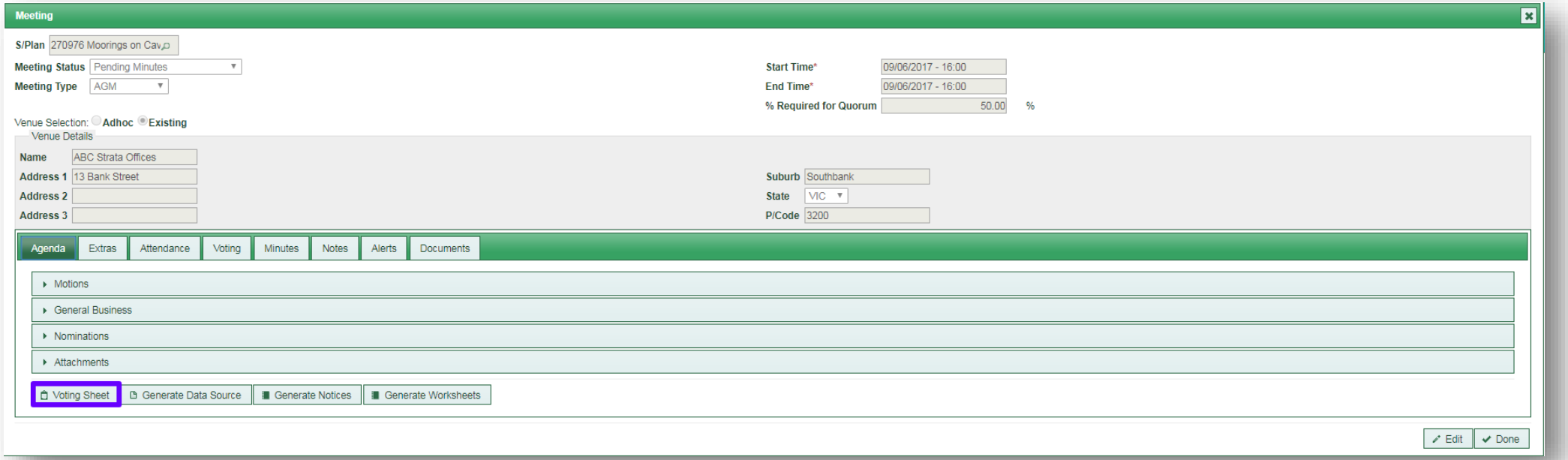


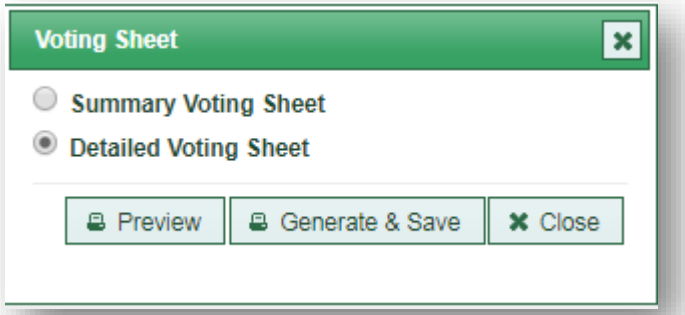
ITEM 6. MEETINGS NEW FEATURE - GENERATE MORE ITEMS DIRECT FROM THE MEETING CARD

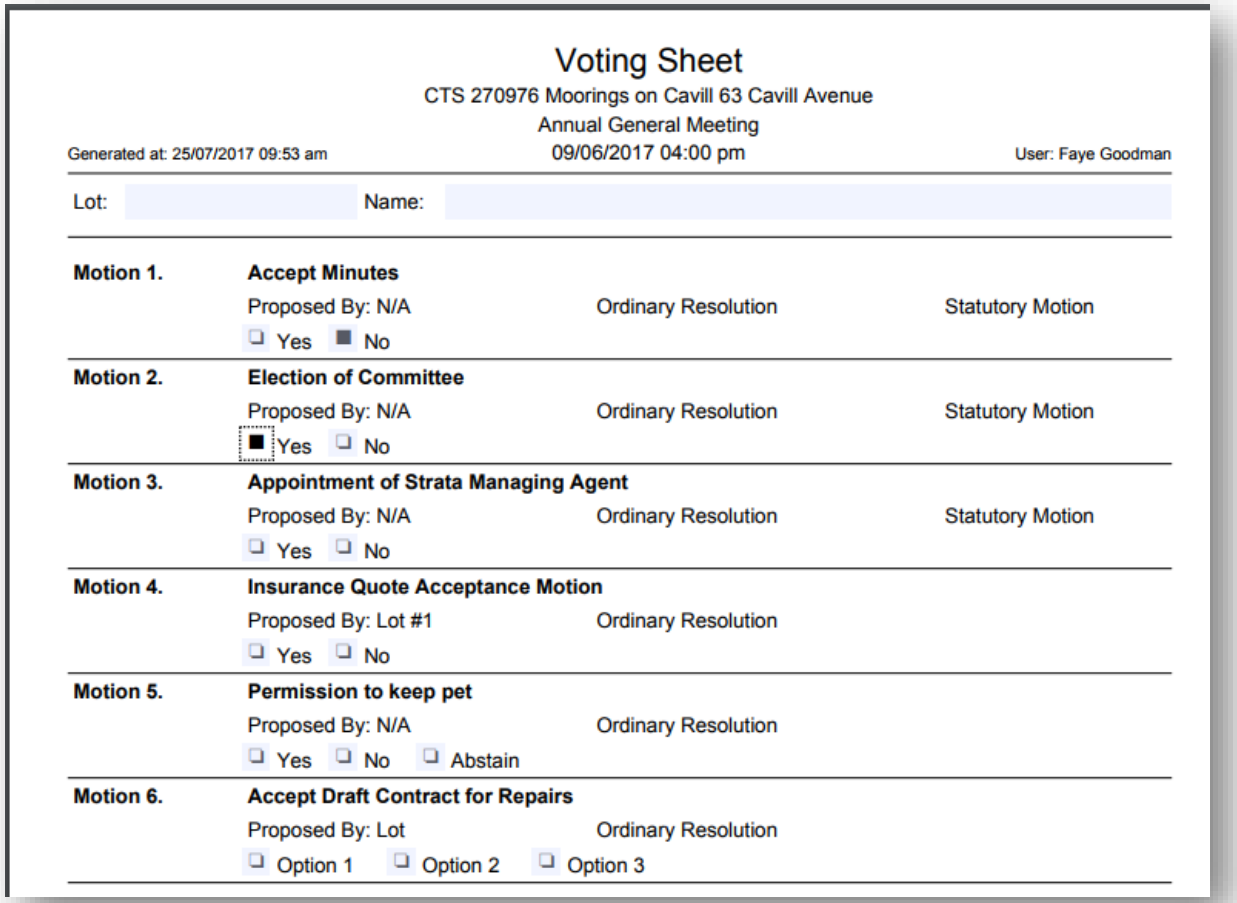
To generate a data source that can be used in other applications such as Microsoft Word, click on Generate Data Source



Generate a Voting Sheet







Voting Sheet

CTS 270976 Moorings on Cavill 63 Cavill Avenue

Annual General Meeting

Generated at: 25/07/2017 09:53 am — 09/06/2017 04:00 pm — User: Faye Goodman

Lot: Name:

Motion 1. **Accept Minutes**

Proposed By: N/A — Ordinary Resolution — Statutory Motion

☐ Yes ■ No

Motion 2. **Election of Committee**

Proposed By: N/A — Ordinary Resolution — Statutory Motion

■ Yes ☐ No

Motion 3. **Appointment of Strata Managing Agent**

Proposed By: N/A — Ordinary Resolution — Statutory Motion

☐ Yes ☐ No

Motion 4. **Insurance Quote Acceptance Motion**

Proposed By: Lot #1 — Ordinary Resolution

☐ Yes ☐ No

Motion 5. **Permission to keep pet**

Proposed By: N/A — Ordinary Resolution

☐ Yes ☐ No ☐ Abstain

Motion 6. **Accept Draft Contract for Repairs**

Proposed By: Lot — Ordinary Resolution

☐ Option 1 ☐ Option 2 ☐ Option 3

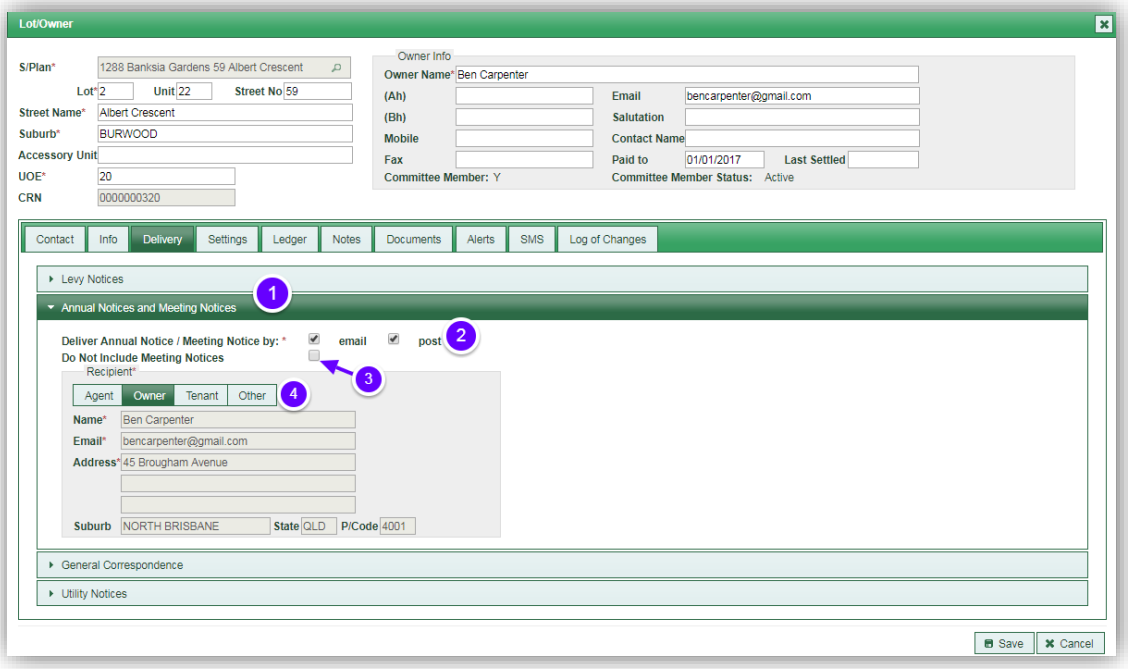
ITEM 7. LOT OWNER CARD – NEW DELIVERY OPTIONS

You can now specify a different recipient for Annual Notices/Meeting Notices and General Correspondence

ANNUAL NOTICES AND MEETING NOTICES ACCORDION

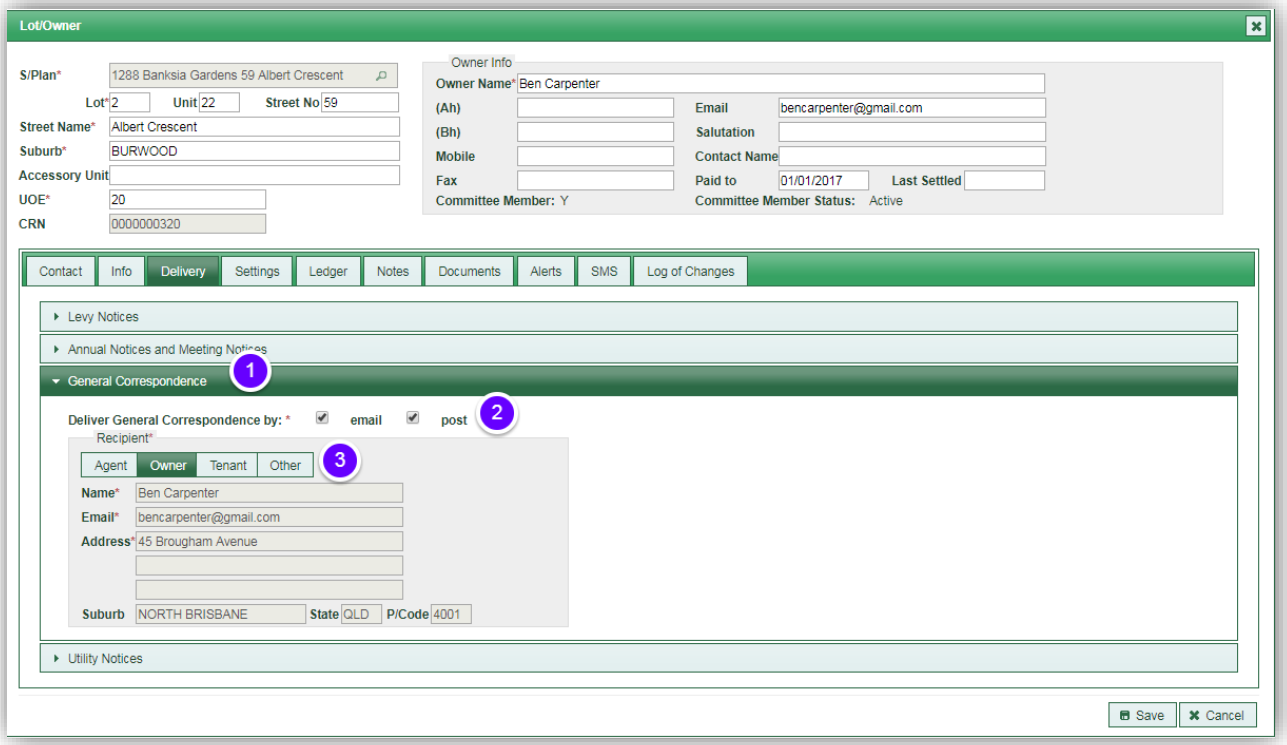
An Owner may want these items to go to a different contact and by a different method to their levy notices. For example, the levy reminders might go to the Property Manager to pay but the Owner wants to receive the Annual Notices and General Correspondence themselves.

1. Click on the little white arrow next to the Annual Notices and Meeting Notices
2. Select the Owner's preferred delivery method for Annual Notices
3. You can tick here if you want to exclude this Owner from receiving Meeting Notices. For example, if they own multiple lots and already receive Meeting Notices from another Lot
4. The Recipient will default to Owner but you can toggle between the tabs to alter



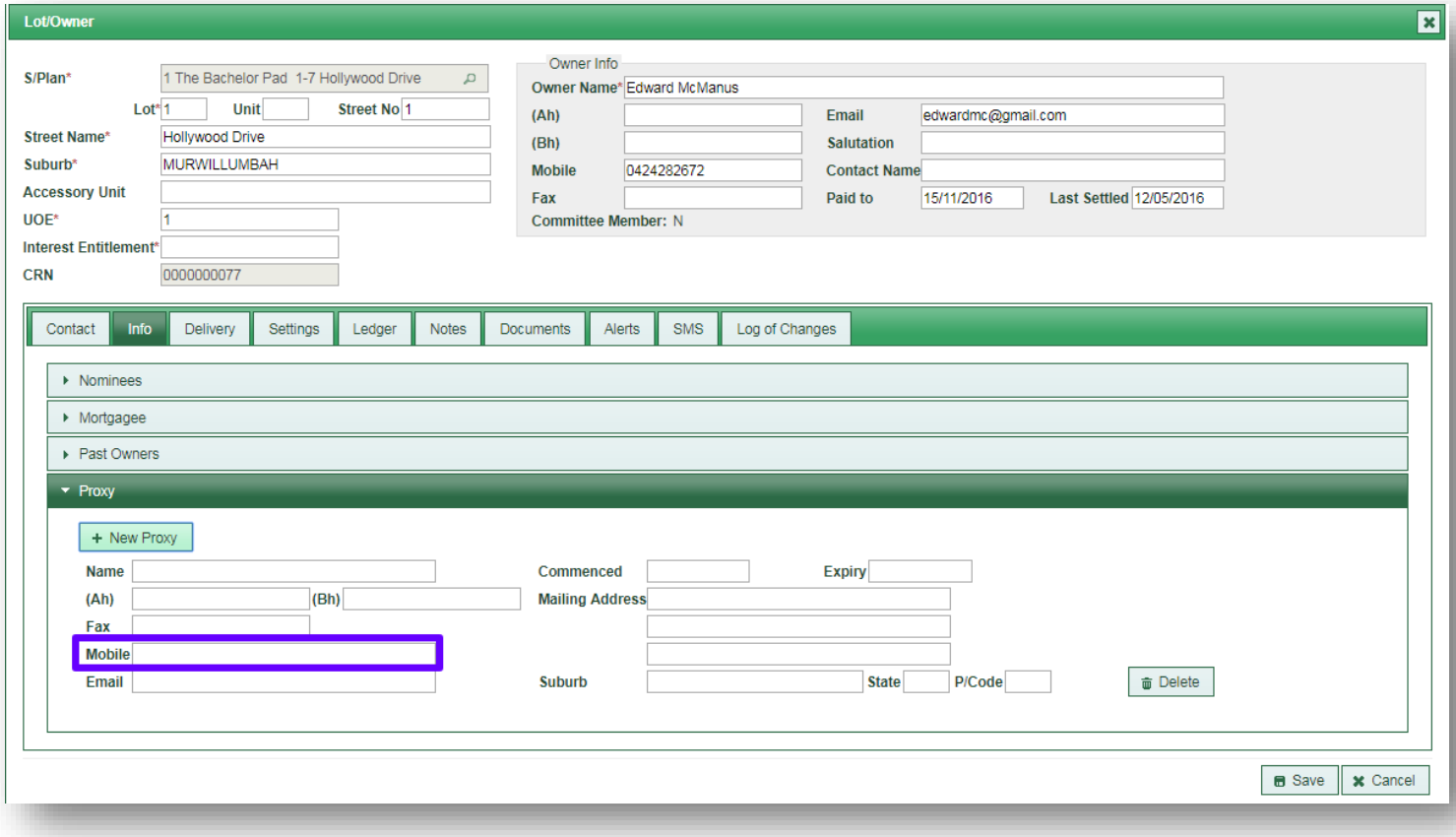
GENERAL CORRESPONDENCE ACCORDION

1. Click on the little white Arrow next to the General Correspondence Accordion
2. Select the Owners preferred deliver for general correspondence
3. The Recipient will default to Owner but you can toggle between the tabs to alter



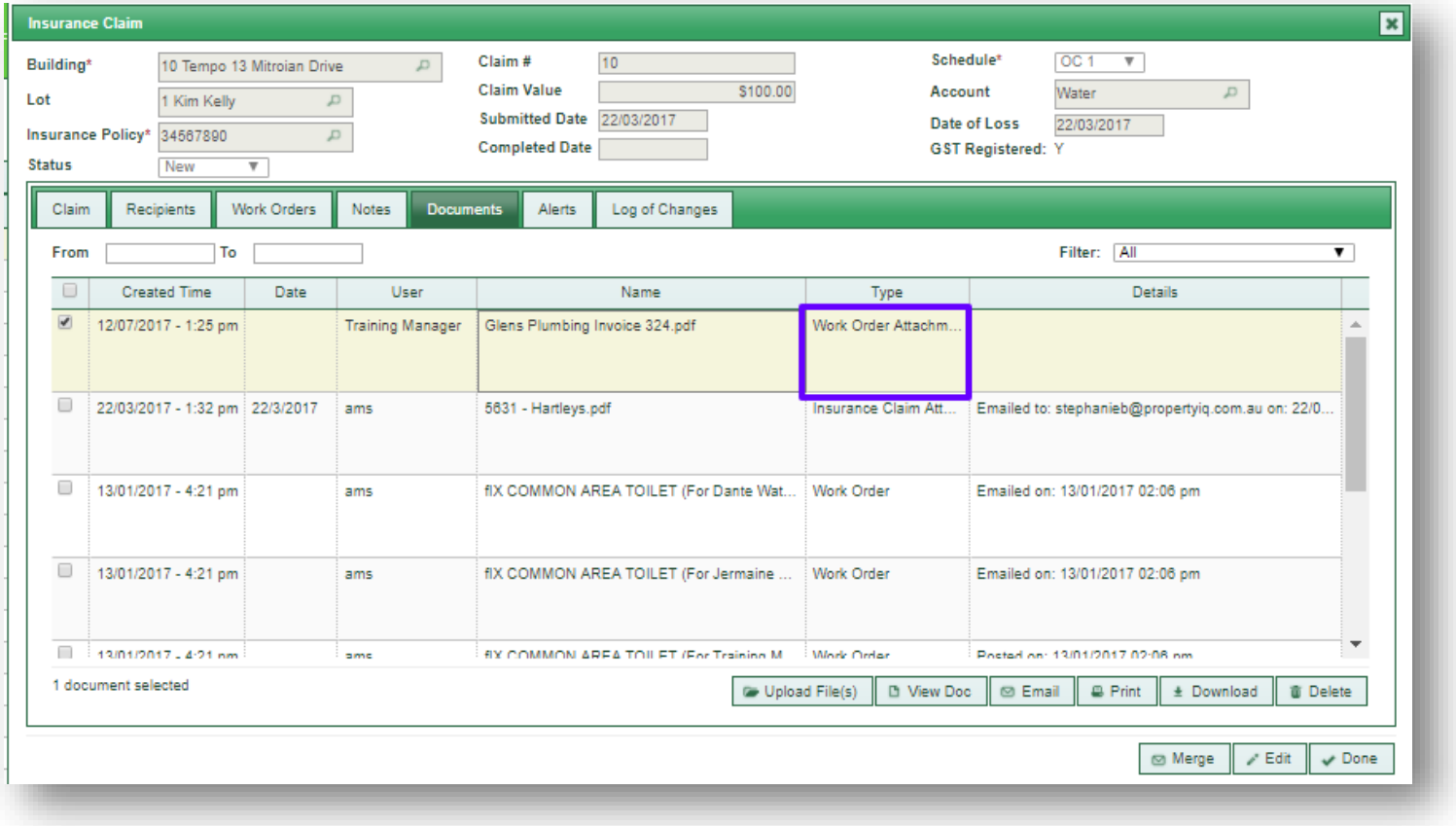
ITEM 8. NEW DATA ENTRY FIELD IN LOT OWNERS CARD>INFO -PROXY

You can now enter a mobile number for a Proxy.



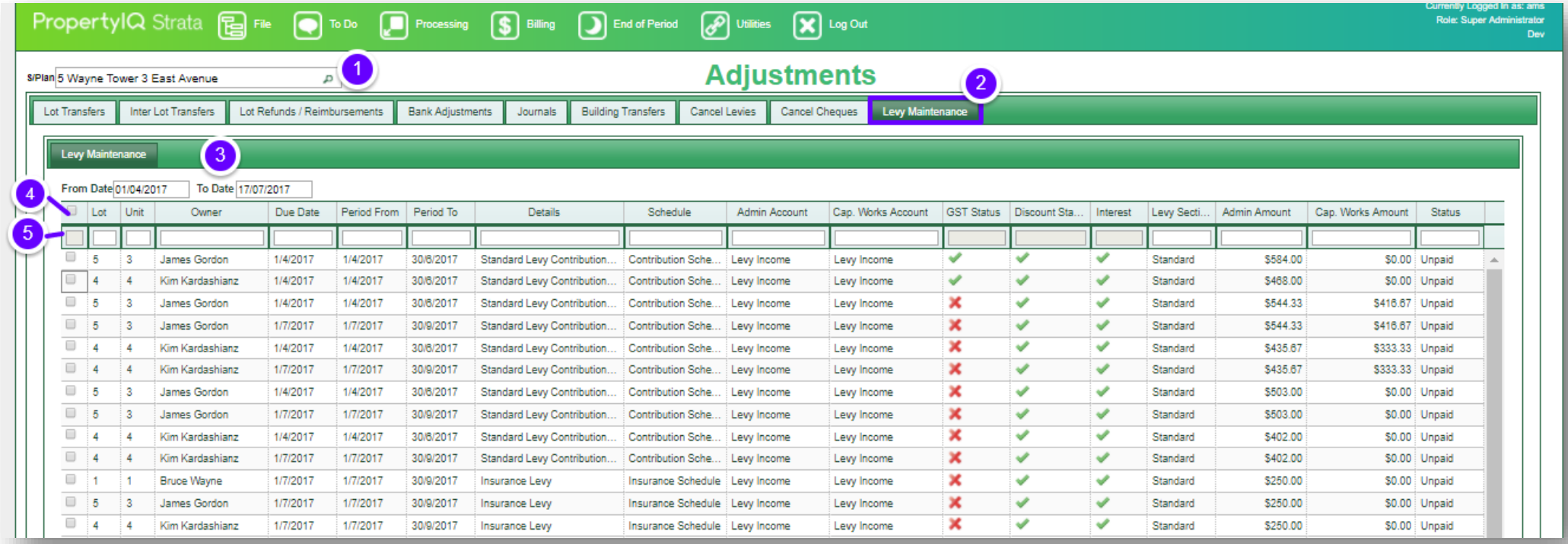
ITEM 9. INSURANCE CLAIM WITH WORK ORDER ATTACHED – ALL DOCUMENTS NOW VISIBLE FROM THE INSURANCE CLAIM

If you have attached a Work Order to an Insurance Claim, you will now be able to view all the documents that are attached to the Work Order from the Documents Tab in the Insurance Claim (including Supplier Invoices). This will allow you to email them when needed.



ITEM 10 -ADJUSTMENTS NEW TAB – LEVY MAINTENANCE

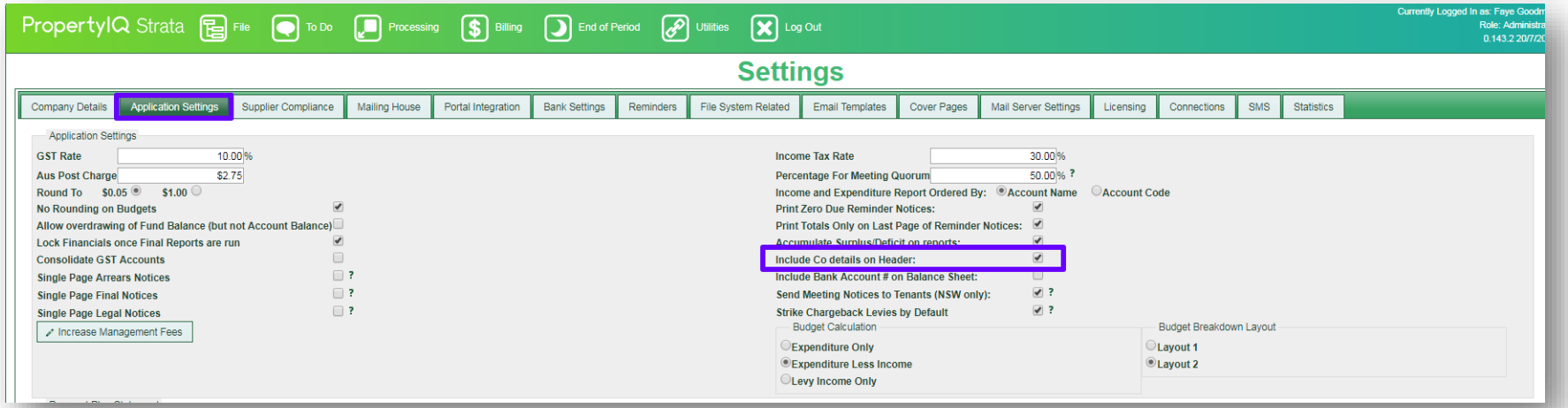
1. Go to Processing – Adjustments, select the Building you want to work with
2. Click on the Levy Maintenance Tab
3. You can refine your view by date – click in the boxes to open the calendar and Select the From and To Dates
4. You can click on any of the column headings to sort your view by that heading
5. Type some key letters in any of the empty boxes on the top line to refine your search



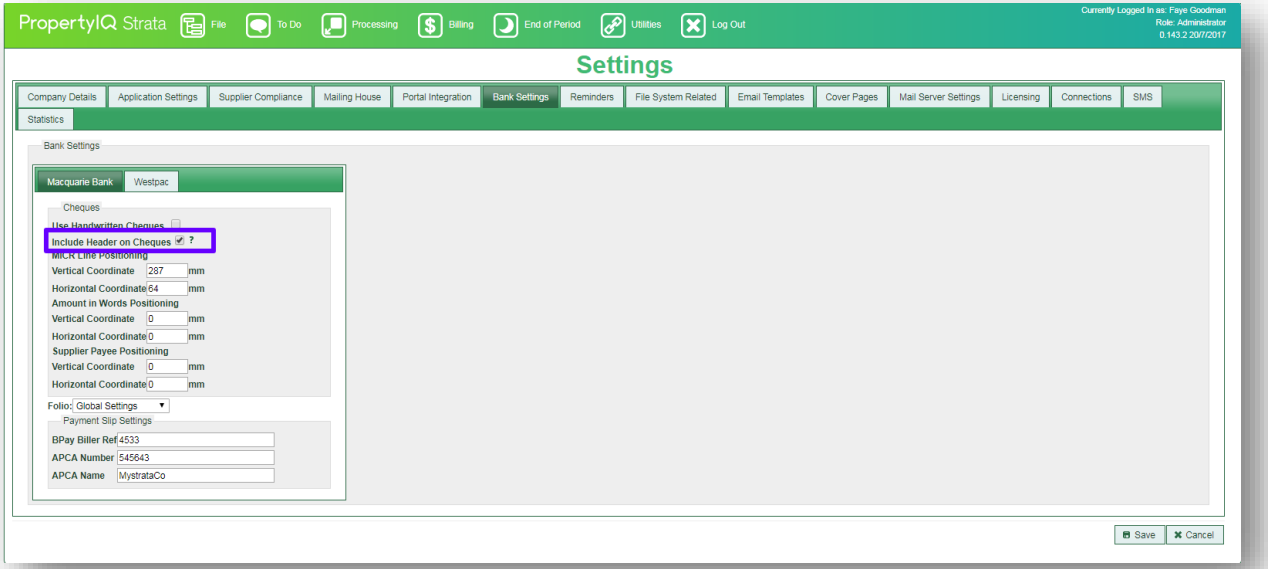
Lot	Unit	Owner	Due Date	Period From	Period To	Details	Schedule	Admin Account	Cap. Works Account	GST Status	Discount Sta...	Interest	Levy Secti...	Admin Amount	Cap. Works Amount	Status
5	3	James Gordon	1/4/2017	1/4/2017	30/6/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✓	✓	✓	Standard	$584.00	$0.00	Unpaid
4	4	Kim Kardashianz	1/4/2017	1/4/2017	30/6/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✓	✓	✓	Standard	$468.00	$0.00	Unpaid
5	3	James Gordon	1/4/2017	1/4/2017	30/6/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✗	✓	✓	Standard	$544.33	$416.67	Unpaid
5	3	James Gordon	1/7/2017	1/7/2017	30/9/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✗	✓	✓	Standard	$544.33	$416.67	Unpaid
4	4	Kim Kardashianz	1/4/2017	1/4/2017	30/6/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✗	✓	✓	Standard	$435.67	$333.33	Unpaid
4	4	Kim Kardashianz	1/7/2017	1/7/2017	30/9/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✗	✓	✓	Standard	$435.67	$333.33	Unpaid
5	3	James Gordon	1/4/2017	1/4/2017	30/6/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✗	✓	✓	Standard	$503.00	$0.00	Unpaid
5	3	James Gordon	1/7/2017	1/7/2017	30/9/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✗	✓	✓	Standard	$503.00	$0.00	Unpaid
4	4	Kim Kardashianz	1/4/2017	1/4/2017	30/6/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✗	✓	✓	Standard	$402.00	$0.00	Unpaid
4	4	Kim Kardashianz	1/7/2017	1/7/2017	30/9/2017	Standard Levy Contribution...	Contribution Sche...	Levy Income	Levy Income	✗	✓	✓	Standard	$402.00	$0.00	Unpaid
1	1	Bruce Wayne	1/7/2017	1/7/2017	30/9/2017	Insurance Levy	Insurance Schedule	Levy Income	Levy Income	✗	✓	✓	Standard	$250.00	$0.00	Unpaid
5	3	James Gordon	1/7/2017	1/7/2017	30/9/2017	Insurance Levy	Insurance Schedule	Levy Income	Levy Income	✗	✓	✓	Standard	$250.00	$0.00	Unpaid
4	4	Kim Kardashianz	1/7/2017	1/7/2017	30/9/2017	Insurance Levy	Insurance Schedule	Levy Income	Levy Income	✗	✓	✓	Standard	$250.00	$0.00	Unpaid

ITEM 12. NEW TICK BOX – INCLUDE HEADER DETAILS ON CHEQUES

If you have ticked to include your Company details as a Header in Settings>Applications Settings>Include Co details on Header, you can now nominate whether you want the headings to appear when printing cheques



There is a new tick box in Settings>Bank Settings. You can now tick to include or not include Header details on cheques. You must have the tickbox above selected if you do want to print header details on cheques.


PropertyIQ Strata
File
To Do
Processing
Billing
End of Period
Utilities
Log Out
Currently Logged In as: Faye Goodman
Role: Administrator
0.143.2 20/7/2017
Settings
Company Details
Application Settings
Supplier Compliance
Mailing House
Portal Integration
Bank Settings
Reminders
File System Related
Email Templates
Cover Pages
Mail Server Settings
Licensing
Connections
SMS
Statistics
Bank Settings
Macquarie Bank
Westpac
Cheques
Use Handwritten Cheques
Include Header on Cheques
MICR Line Positioning
Vertical Coordinate 287 mm
Horizontal Coordinate 64 mm
Amount in Words Positioning
Vertical Coordinate 0 mm
Horizontal Coordinate 0 mm
Supplier Payee Positioning
Vertical Coordinate 0 mm
Horizontal Coordinate 0 mm
Folio: Global Settings
Payment Slip Settings
BPay Biller Ref 4533
APCA Number 545643
APCA Name MystrataCo
Save
Cancel