PropertyIQ Strata

Release Notes Version 145.3-147.7

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SUMMARY

Features	1. New Feature – Logging for all outgoing Emails. There is now a new menu option under Utilities – Emailing. This allows you to view all outgoing emails, their status and attachments 2. New South Wales and ACT Buildings – you can now bulk generate Information Certificates for a selected Building, for all lots or selected lots. This streamlines the creation of information certificates where a whole Building or a large proportion of lots, has been sold. File > Buildings > Building Card New Merge Fields have been created. 3. Suppliers – Changes to Compliance. You can now enter multiple supplier compliance types and the Compliance Tab in the Supplier card now shows more detail. The types are set up in your Settings>Supplier Compliance Tab. The Compliance Tab on the Supplier card now shows details, sum insured, expiry date, comments and status for all your supplier compliance types. Entering a Public Liability and OHS expiry date is now a requirement. A supplier that has had manual compliance data entered prior to this update, but does not have the Public Liability Expiry or OHS Expiry dates set will now be set to the current date by default. You will now also be able to print a diary report of supplier compliance status. 4. There is a new Setting available in Supplier Compliance to restrict selection of Suppliers that show as non-compliant on the program. If this is ticked, when you try to select a non-compliant supplier for invoices, work orders or quotes, you will receive a message saying that the supplier is non-compliant and can't be used. If an existing Work Order has a non-compliant suppler attached to it, it will show in red on the Work Orders Screen. 5. New Feature –Levy Maintenance Screen – You can now view and edit single or bulk levies from the levy maintenance Screen. Processing>Adjustments>Levy Maintenance Screen.

Program Improvements	6. There is a new Setting available in Supplier Compliance to restrict selection of Suppliers that show as non-compliant on the program. If this is ticked, when you try to select a non-compliant supplier for invoices, work orders or quotes, you will receive a message saying that the supplier is non-compliant and can't be used. If an existing Work Order has a non-compliant suppler attached to it, it will show in red on the Work Orders Screen. 7. An update to allow the ability to merge newer PDF Files with PIQ generated PDFs has been completed. This should prevent any issues with attaching PDF documents from the program. 8. The Main Screen and all dialogs now have a shadow to improve visibility. 9. You can now refine the documents screen view by date range. This will speed up the time it takes to return a result if you have a lot of documents.
	10. When producing a Diary Report of Building Financial Year End Dates, there was previously an issue with the sort order. The report can now be sorted in order of "Date Ascending", "Date Descending", "Building Name and "Building Strata Plan". 11. An issue when generating an Arrears List Export that has been filtered by Folio, where other Folios were appearing, has been fixed. 12. Templates – Custom Merge Templates >Insurance Claim Document – an issue where the Merge Field Claim_Details was merging multi-line values as a single line, has been fixed. 13. For Bing Users. When sending lot Owner correspondence items and Agent is selected as the recipient. The address will now read "Owner name" C/- "Agent Name. 14. For Bing Users. When sending documents to Bing that are Landscape orientation, Bing will now print them in Landscape orientation. 15. For Bing Users, an issue where, if you were using Bing but not for emails, the program was trying to create post records and generated an error, has now been fixed. 16. For Bing Users, an issue where, if you were sending notices to Bing and the first one failed due to something like a missing suburb, then no notices were sent for the Building, has been fixed. 17. An issue where some items on an arrears list were overlapping, has now been fixed. BAU 1001

18. Templates – Custom Merge Templates – new merge field Current_ Arrears. This takes the data from the arrears amount seen in a lot owner card ledger.
19. New Merge Field available for Custom Templates – Levy_Message
20. New Merge Field available for Meeting Notice Templates - Meeting_Day_Of_Week
21. Pre-printed cheques – there are now four more settings to allow you to line up data better on pre-printed cheques.
22. For Victorian Users - Proposed Budget Report - the title “Aggregate Units of Entitlement” now reads “Aggregate Units of Liability”
23. More information on Lot Owners Ledgers – the Lot owner’s ledger now has a new line on the details column – Levy reference to make it easier to identify which levy a particular receipt has paid. The Levy reference will also show on the Owners Ledger Report.
24. When doing a transfer “From Credit” for an amount that has been sitting as a credit and you now want to apply it to a levy, the program will now calculate interest due based on the date the original amount was paid, not the date the “from Credit” is processed. For example, if you received an amount from an owner didn’t know where to allocate it so the funds were just sitting as a credit balance and you found out a month later which levy you wanted to allocate the funds to, then the interest will be calculated based on the day they were received a month ago.
25. Bulk Credit Transfer – new wording. When processing a Due Notice run or when doing Credit transfers manually in the adjustments screen, when you click on the “Bulk Credit Transfer” button you will now see a new message that is clearer about what will happen. The new message reads. “Select the Buildings to bulk-allocate. Click process to automatically allocate credits for all the selected Buildings according to the TXN auto-allocation rules. Note. This only allocates against principal amounts and will not allocate against any interest due”
26. An Issue where interest rate was calculating incorrectly if you changed the interest rate for a building, has now been fixed.

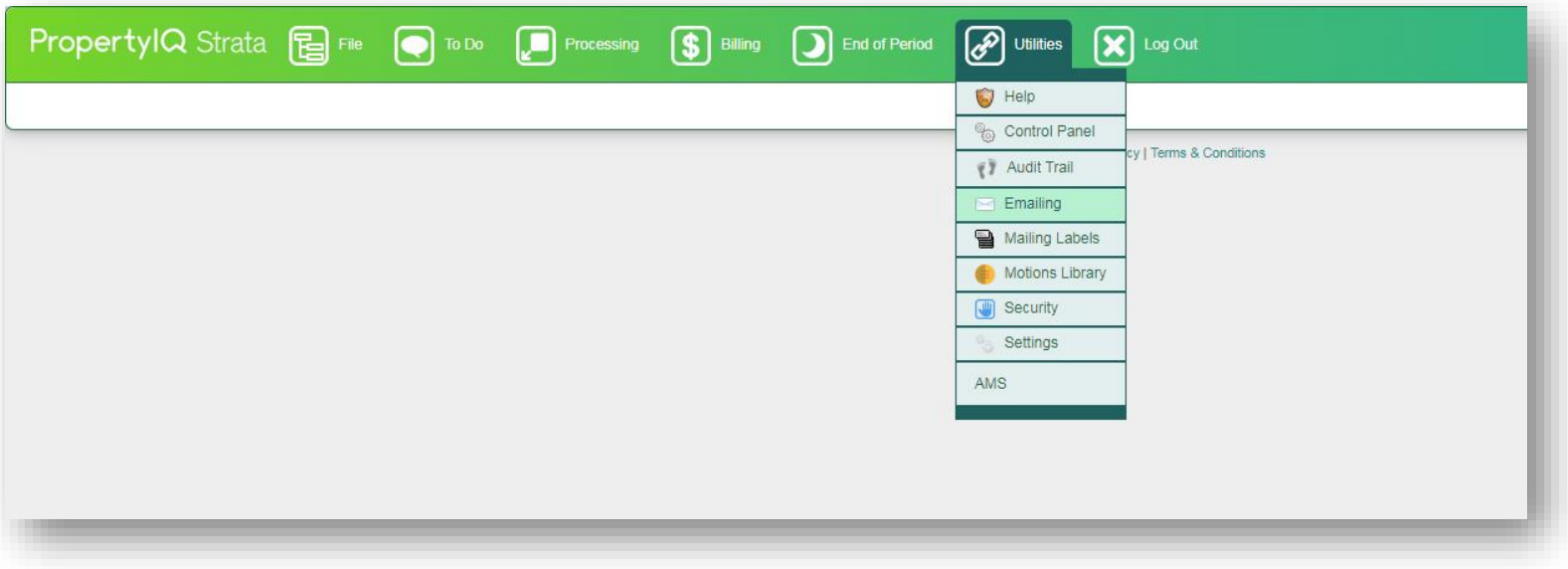
27. Lot Owners Card>Ledger – Changes to Interest. The owner ledger now has two columns for Interest. Due – which shows the outstanding amount of interest due on each levy and the other column shows Interest paid. This shows any interest that has already been paid against that levy.
28. New Meeting Templates available for Company Title Buildings. You will now be able to generate meeting Notices and Meeting minutes for all types of meetings for Company Title Buildings. You will need to set up the new meeting Notice and Minutes templates first.
29. An issue where some special levies in NSW and WA were grouping together if they had the same date on a 184, 26 Certificate (NSW) and a Section 41 Certificate (WA) – has now been resolved.
30. GST merge field calculation changes for Due Notice templates. If a Building is GST registered, then the GST_Label , merge field now shows the GST amount calculated based on the net total amount of each levy regardless of any payments made or interest charged. The Nett_Label is calculated on the nett total amount for each levy and the Gross_Label field is calculated on the gross total amount for each levy and excludes discount.
31. Sending bulk Financial Reports to committee members – email subject line. The subject line now shows the Strata Plan for example - S/Plan 1234 Financial Reports.
32. Changes to TXN auto allocation for Lot Owners that have “Legal Action” or “Repayment Plan” notes entered in the settings tab of their Lot Owners card. Previously, any payments received from them would not be automatically allocated and you would then allocate manually. You will now be able to tick “Auto Alllocate Levy Receipts” individually on the affected lot owners card to allow these Lot Owner’s payments to be allocated according to the auto allocate rules in your Settings.
33. For Folio users. An issue where info certificates were not showing the Folio Specific data, has now been fixed.
34. A new merge field is now available in Information Certificates and Annual Levy Notices – Agent_Principal – which allows for the name of the Agency Principal entered in your Company Settings, to be inserted into these documents.
35. An issue where saving a Building without reloading the building card was resetting the financial year and levy year start dates in some instances – has now been resolved.
36. An issue where in some instances the building card was still editable after locking balances– has now been fixed.

37. When viewing an owner's ledger from the Building Card >Financials>Lot Owner Positions, for a building with multiple schedules, you will now be able to view the arrears amount and interest owing separately for each schedule.
38. Cover pages for Financial Reports and Levy Notices can now be set to show Folio Specific details. This is set up in Settings>Cover Pages.
39. Building Export – Opening Balance Date is now included when a Building Export is conducted.
40. Executive Committee/Strata Committee Meeting changes. When generating Notices or Minutes for an Executive or Strata Committee meeting only Committee members will now receive them when you "Generate and Save".The method they receive them by is the method they have indicated on their Committee Member Card.
41. For Trades Monitor users. Trades Monitor has recently introduced a new notation "Alert" for contractors with their compliance expiring soon. This was causing some issues in the import as they were showing as invalid on our program. The import will now show compliance as valid until the expiry date of their compliance occurs.
42. New Merge fields for Custom Merge Templates `Arrears_Charge` `Legal_Charge` and `Final_Charge` These fields come from "Arrears Notice" "Final Notice" & "Legal Notice" of the "Charge Schedule" screen for the currently selected schedule.
43. When adding a new attachment to a Meeting, the latest added document will now go to the bottom of the list and print last (you can still shuffle the order manually).
44. An issue where the Debtor Invoice screen was overwriting GST and Schedule selections, has now been fixed.
45. An issue in interest calculations, when calculating interest as at a date prior to the date a receipt was paid (for partially paid levies) has now been fixed.
46. Some changes have been made to the interest calculation on the Owners Ledger Report that affected some lot owners, so they will now calculate correctly.

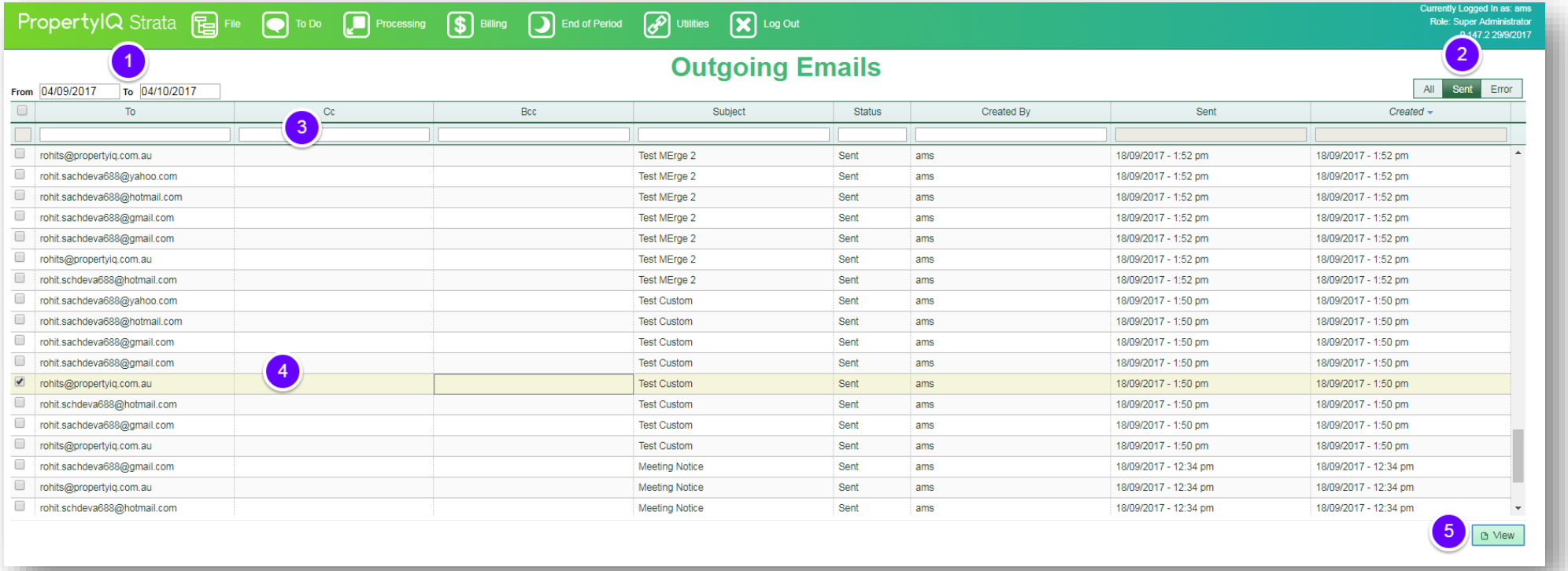
DETAILED SCREENSHOTS

ITEM 1 – NEW FEATURE – LOG FOR ALL OUTGOING EMAILS

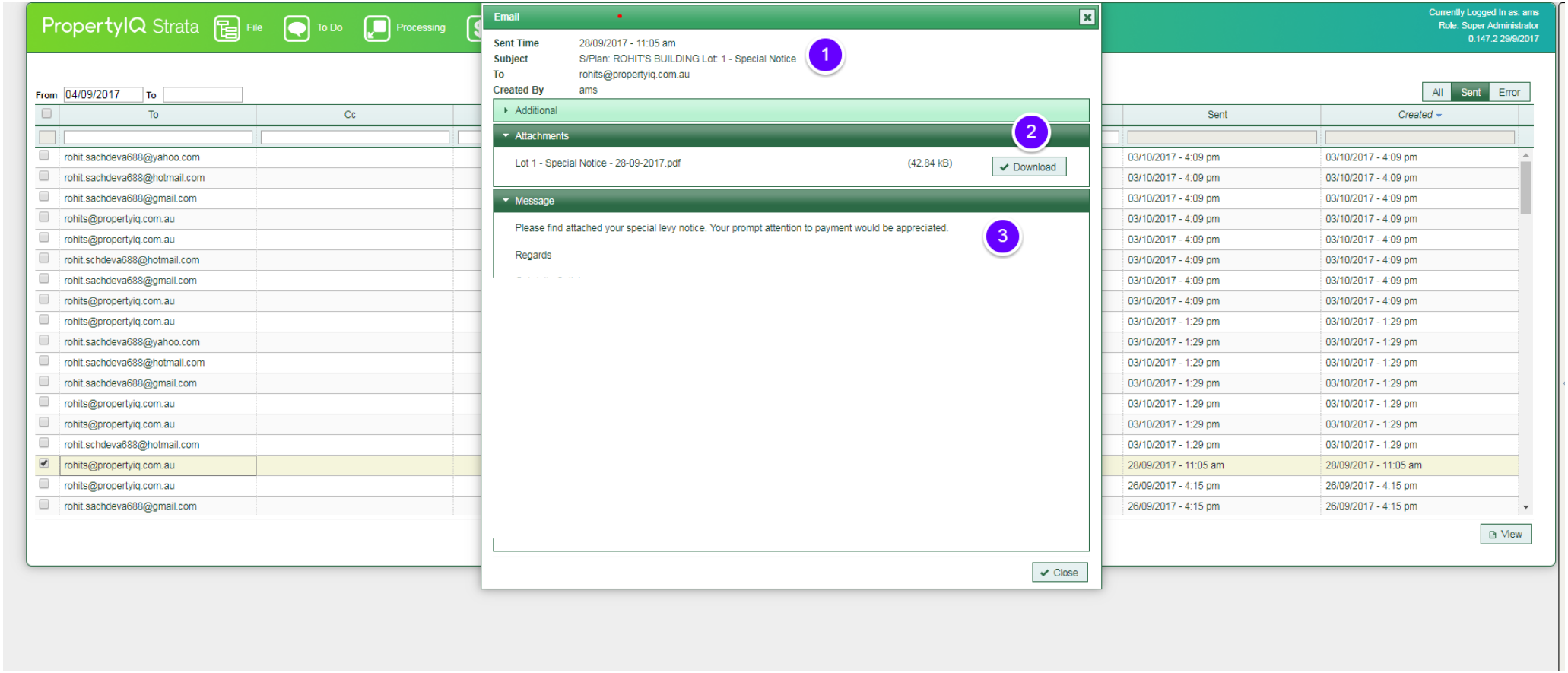
The Utilities Menu now has a new option – Emailing. You can now view a log of all outgoing emails



1. The default view is to see all emails for the past month. Click on the boxes to open the calendar and select a date range to filter your view.
2. The default view is to emails that were sent successfully but you can click on the tabs to sort your view to all or Error
3. Type some key letters in any of the empty boxes on the top line to refine your search
4. Click on an item to highlight and then double click *or*
5. Click on the View button at the bottom of the screen



1. The details of the email show here
2. Any attachments show here – click on the download button to download a PDF copy of the attachment
3. The body of the email shows here.


PropertyIQ Strata
File
To Do
Processing
Currently Logged In as: ams
Role: Super Administrator
0.147.2 29/9/2017
From 04/09/2017 To
All Sent Error
To Cc Sent Created
rohit.sachdeva688@yahoo.com 03/10/2017 - 4:09 pm 03/10/2017 - 4:09 pm
rohit.sachdeva688@hotmail.com 03/10/2017 - 4:09 pm 03/10/2017 - 4:09 pm
rohit.sachdeva688@gmail.com 03/10/2017 - 4:09 pm 03/10/2017 - 4:09 pm
rohits@propertyiq.com.au 03/10/2017 - 4:09 pm 03/10/2017 - 4:09 pm
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rohit.schdeva688@hotmail.com 03/10/2017 - 4:09 pm 03/10/2017 - 4:09 pm
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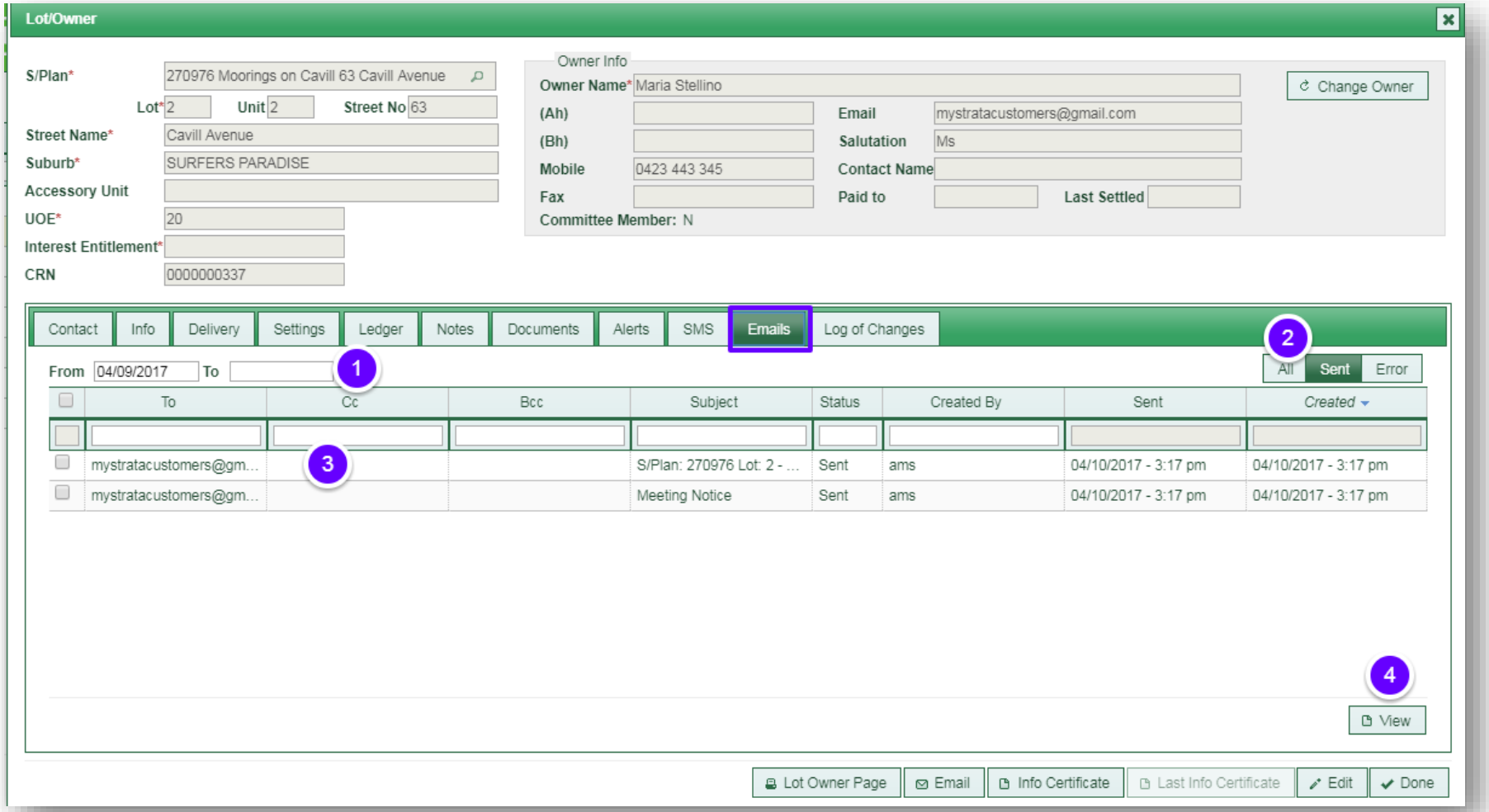
rohit.sachdeva688@hotmail.com 03/10/2017 - 1:29 pm 03/10/2017 - 1:29 pm
rohit.sachdeva688@gmail.com 03/10/2017 - 1:29 pm 03/10/2017 - 1:29 pm
rohits@propertyiq.com.au 03/10/2017 - 1:29 pm 03/10/2017 - 1:29 pm
rohits@propertyiq.com.au 03/10/2017 - 1:29 pm 03/10/2017 - 1:29 pm
rohit.schdeva688@hotmail.com 03/10/2017 - 1:29 pm 03/10/2017 - 1:29 pm
rohits@propertyiq.com.au 28/09/2017 - 11:05 am 28/09/2017 - 11:05 am
rohits@propertyiq.com.au 26/09/2017 - 4:15 pm 26/09/2017 - 4:15 pm
rohit.sachdeva688@gmail.com 26/09/2017 - 4:15 pm 26/09/2017 - 4:15 pm
View
Email
Sent Time 28/09/2017 - 11:05 am
Subject S/Plan: ROHIT'S BUILDING Lot: 1 - Special Notice
To rohits@propertyiq.com.au
Created By ams
1
Additional
Attachments
2
Lot 1 - Special Notice - 28-09-2017.pdf (42.84 kB) Download
Message
Please find attached your special levy notice. Your prompt attention to payment would be appreciated.
3
Regards
Close

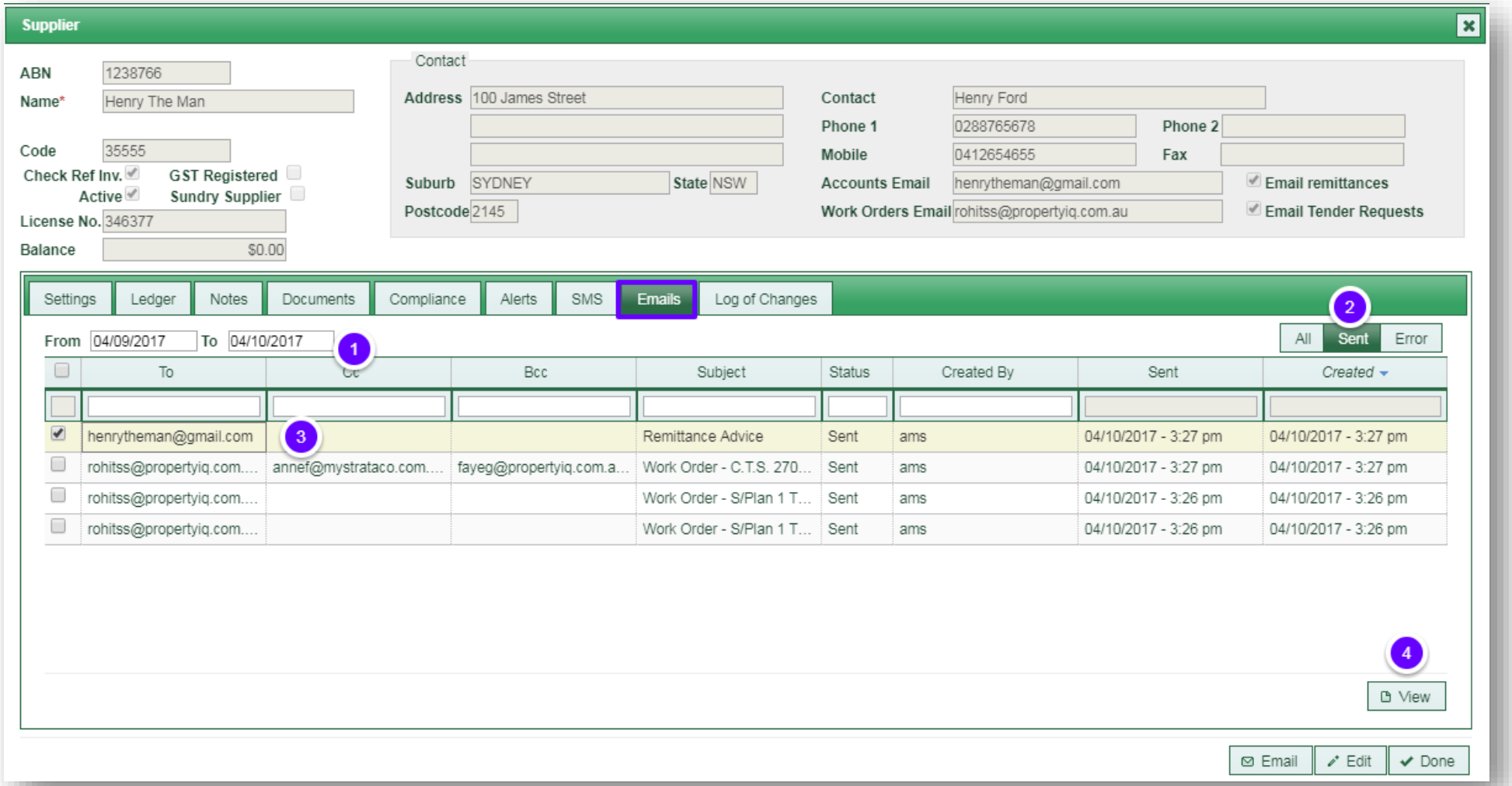
YOU CAN VIEW ALL THE SENT EMAILS FOR A LOT OWNER FROM THE LOT OWNER CARD - EMAILS TAB

1. The default view is the past month but you can click on the boxes to open the calendar and refine your view
2. The default view is Sent emails but you can toggle between tabs to view all or Error emails
3. Click on an item to highlight it on the screen and then double click to select it *or*
4. Click the View button on the bottom of the screen



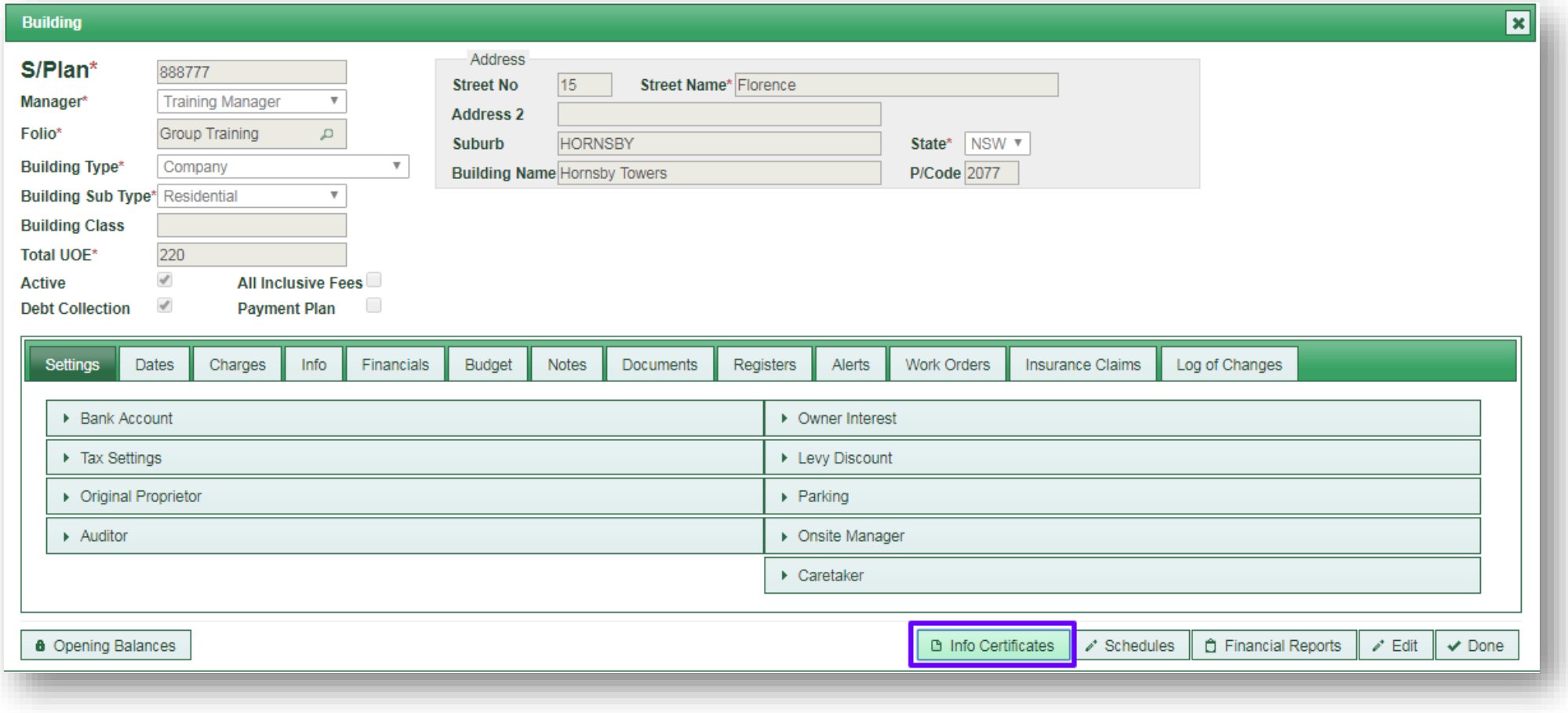
YOU CAN VIEW ALL THE EMAILS FOR A SUPPLIER FROM THE SUPPLIER CARD – EMAILS TAB

1. The default view is for the past month but you can click on the boxes to open the calendar and select a date range
2. The default view is Sent emails but you can toggle between tabs to view all or Error emails
3. Click on an item to highlight it on the screen and then double click to select it *or*
4. Click the View button on the bottom of the screen



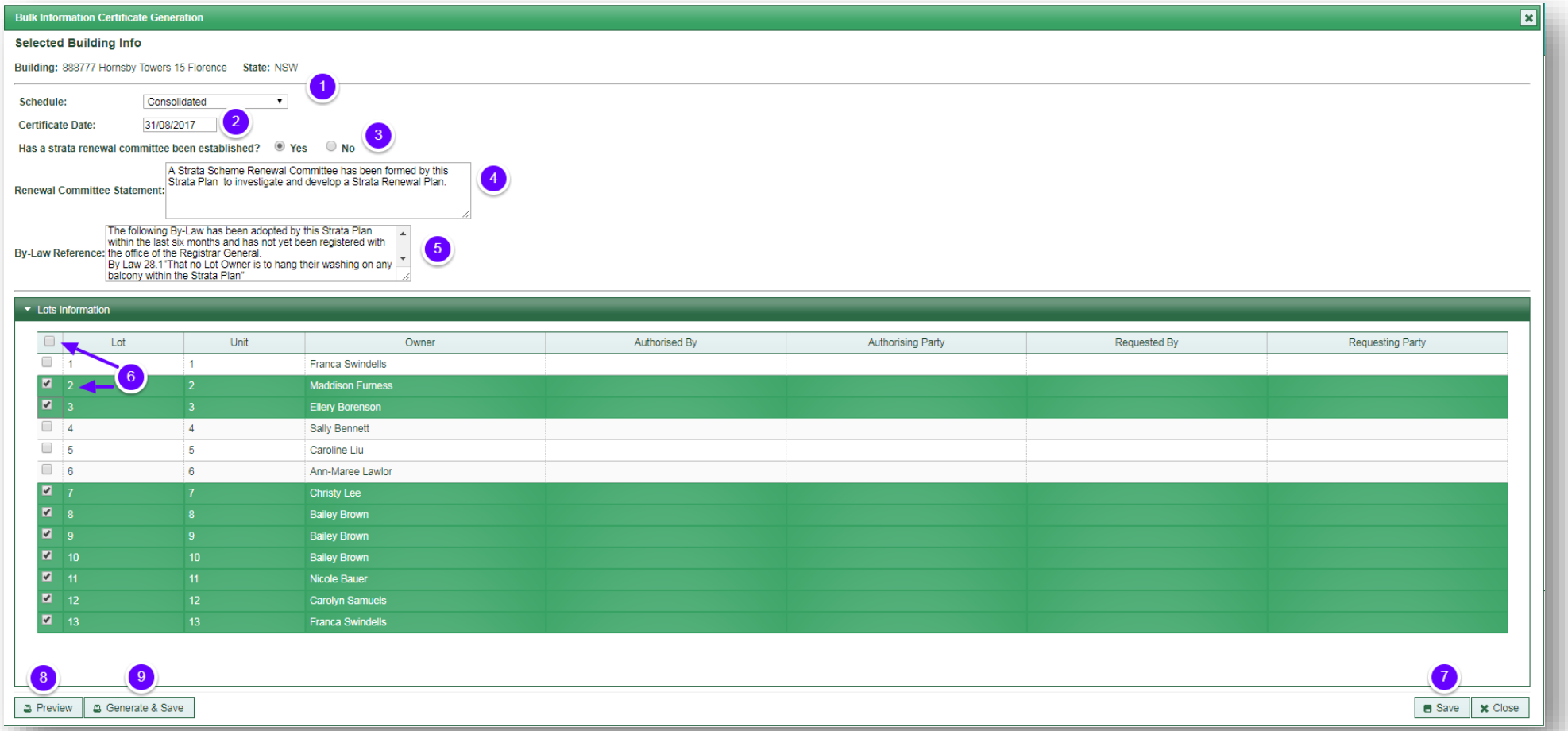
ITEM 2 –NEW SOUTH WALES BUILDINGS - ABILITY TO GENERATE INFORMATION CERTIFICATES IN BULK FOR A SELECTED BUILDING

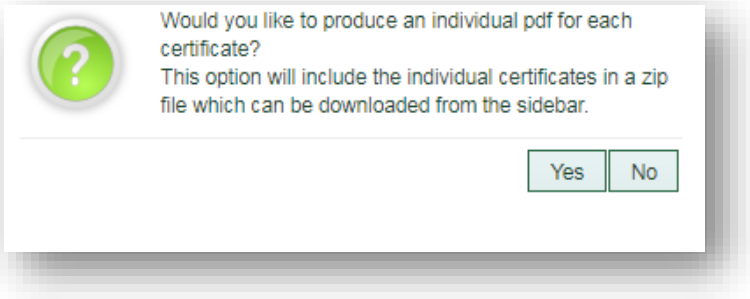
New South Wales and ACT Building cards now have a new button – Info Certificates. You can use this button to generate bulk information certificates for all or selected lots within the Building.



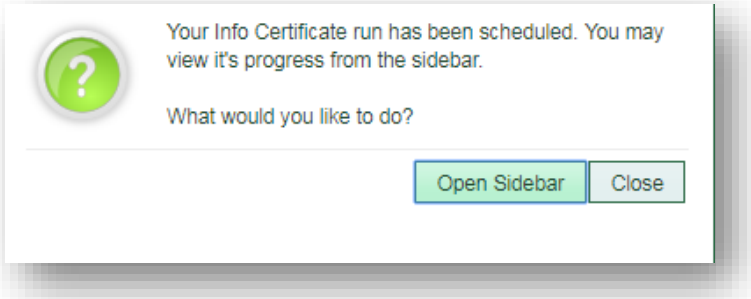
NSW SECTION 184 CERTIFICATE

1. The Default is to produce a Consolidated Certificate. If the Building has more than one Contribution Schedule, you can select a single schedule from the dropdown list
2. Choose the Certificate Date from the Calendar
3. Click in the circles to select whether a Strata Renewal Committee has been formed for this Building
4. If a Strata Renewal Committee has been formed, you can type a statement here
5. If you need to disclose any new by-laws for the Building, you can type them here
6. You can click in boxes to select lots individually or click in the box on the top line to select all
7. Click Save to save the information on the screen so you can come back later and complete the certificates
8. Click Preview to preview the certificates. This will create a job in your task bar
9. Click Generate and Save when you are ready. You will have the option to produce an individual PDF for each certificate. This will create a Zip file, from which you can print each certificate separately or a bulk PDF


Bulk Information Certificate Generation
Selected Building Info
Building: 888777 Hornsby Towers 15 Florence State: NSW
Schedule: Consolidated
Certificate Date: 31/08/2017
Has a strata renewal committee been established? Yes No
Renewal Committee Statement: A Strata Scheme Renewal Committee has been formed by this Strata Plan to investigate and develop a Strata Renewal Plan.
By-Law Reference: The following By-Law has been adopted by this Strata Plan within the last six months and has not yet been registered with the office of the Registrar General.
By Law 28.1"That no Lot Owner is to hang their washing on any balcony within the Strata Plan"
Lots Information
Lot
Unit
Owner
Authorised By
Authorising Party
Requested By
Requesting Party
1 1 Franca Swindells
2 2 Maddison Furness
3 3 Ellery Borenson
4 4 Sally Bennett
5 5 Caroline Liu
6 6 Ann-Maree Lawlor
7 7 Christy Lee
8 8 Bailey Brown
9 9 Bailey Brown
10 10 Bailey Brown
11 11 Nicole Bauer
12 12 Carolyn Samuels
13 13 Franca Swindells
1
2
3
4
5
6
7
8
9
Preview
Generate & Save
Save
Close

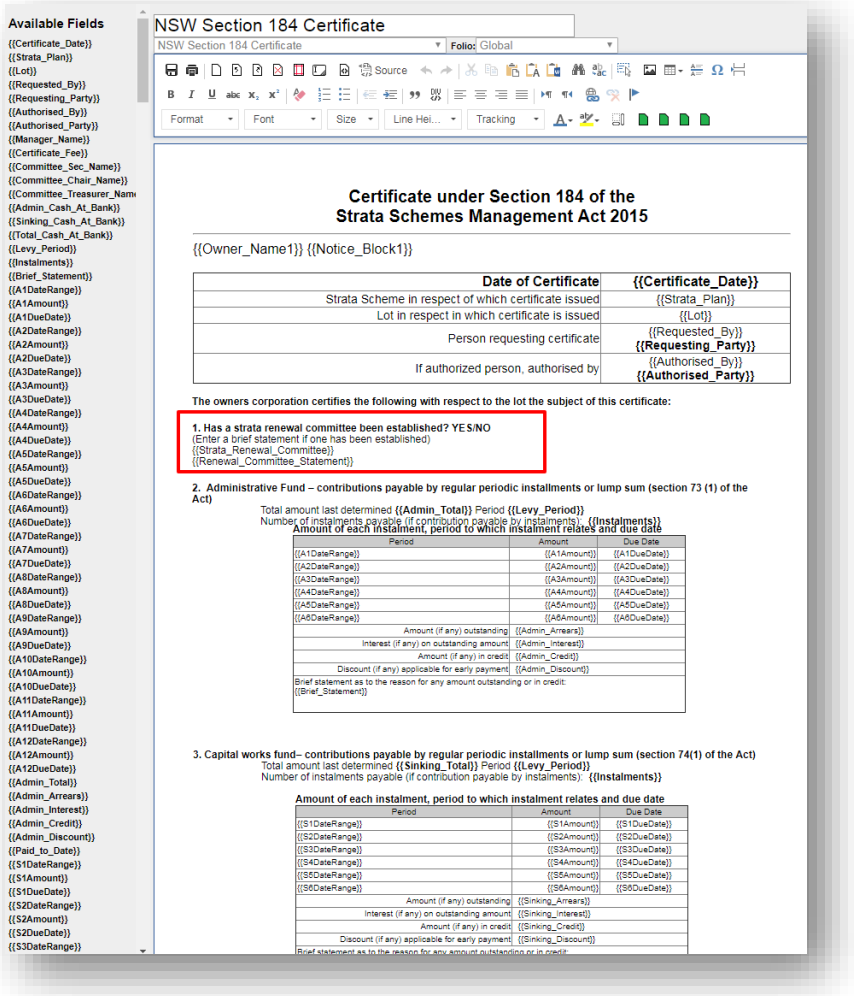


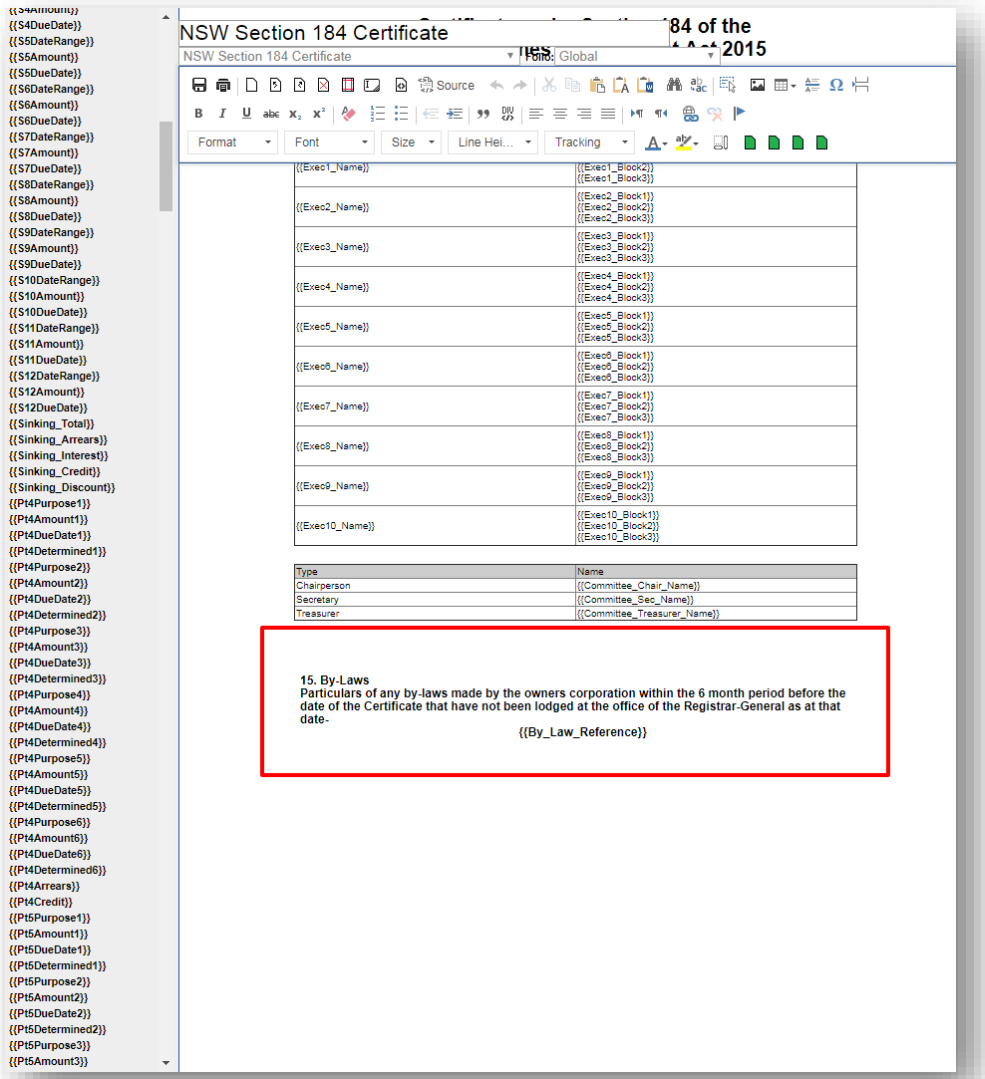
A Job will be created in your Job Centre



Your Section 184 Certificate needs to have the following merge fields:

{{By_Law_Reference}}
{{Strata_Renewal_Committee}}
{{Renewal_Committee_Statement}}




{{S4Amount}}
{{S4DueDate}}
{{S5DateRange}}
{{S5Amount}}
{{S5DueDate}}
{{S6DateRange}}
{{S6Amount}}
{{S6DueDate}}
{{S7DateRange}}
{{S7Amount}}
{{S7DueDate}}
{{S8DateRange}}
{{S8Amount}}
{{S8DueDate}}
{{S9DateRange}}
{{S9Amount}}
{{S9DueDate}}
{{S10DateRange}}
{{S10Amount}}
{{S10DueDate}}
{{S11DateRange}}
{{S11Amount}}
{{S11DueDate}}
{{S12DateRange}}
{{S12Amount}}
{{S12DueDate}}
{{Sinking_Total}}
{{Sinking_Arrears}}
{{Sinking_Interest}}
{{Sinking_Credit}}
{{Sinking_Discount}}
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{{Pt4Amount1}}
{{Pt4DueDate1}}
{{Pt4Determined1}}
{{Pt4Purpose2}}
{{Pt4Amount2}}
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{{Pt4Determined6}}
{{Pt4Arrears}}
{{Pt4Credit}}
{{Pt5Purpose1}}
{{Pt5Amount1}}
{{Pt5DueDate1}}
{{Pt5Determined1}}
{{Pt5Purpose2}}
{{Pt5Amount2}}
{{Pt5DueDate2}}
{{Pt5Determined2}}
{{Pt5Purpose3}}
{{Pt5Amount3}}
NSW Section 184 Certificate
NSW Section 184 Certificate
Fonts: Global
Source
Format
Font
Size
Line Hei...
Tracking
{{Exec1_Name}}
{{Exec1_Block2}}
{{Exec1_Block3}}
{{Exec2_Name}}
{{Exec2_Block1}}
{{Exec2_Block2}}
{{Exec2_Block3}}
{{Exec3_Name}}
{{Exec3_Block1}}
{{Exec3_Block2}}
{{Exec3_Block3}}
{{Exec4_Name}}
{{Exec4_Block1}}
{{Exec4_Block2}}
{{Exec4_Block3}}
{{Exec5_Name}}
{{Exec5_Block1}}
{{Exec5_Block2}}
{{Exec5_Block3}}
{{Exec6_Name}}
{{Exec6_Block1}}
{{Exec6_Block2}}
{{Exec6_Block3}}
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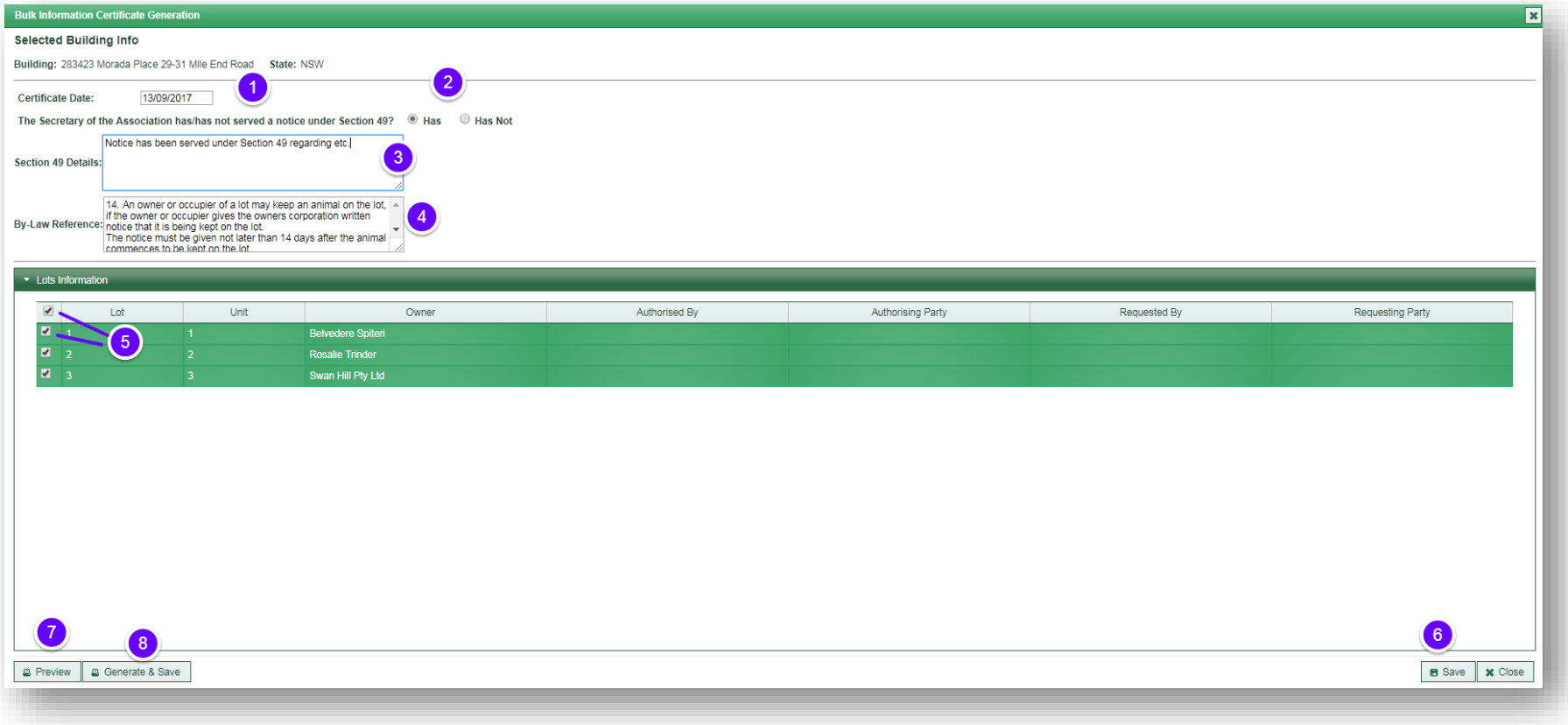
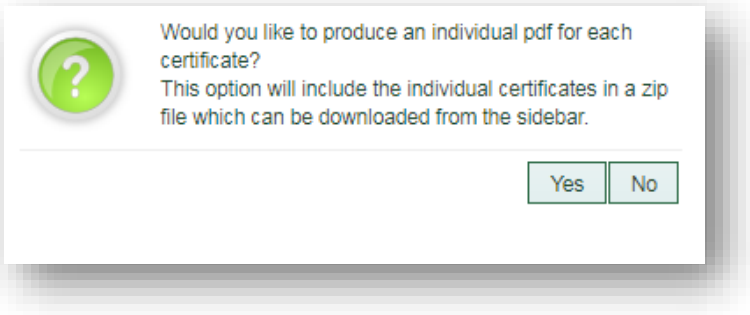
{{Exec7_Block2}}
{{Exec7_Block3}}
{{Exec8_Name}}
{{Exec8_Block1}}
{{Exec8_Block2}}
{{Exec8_Block3}}
{{Exec9_Name}}
{{Exec9_Block1}}
{{Exec9_Block2}}
{{Exec9_Block3}}
{{Exec10_Name}}
{{Exec10_Block1}}
{{Exec10_Block2}}
{{Exec10_Block3}}
Type
Name
Chairperson
{{Committee_Chair_Name}}
Secretary
{{Committee_Sec_Name}}
Treasurer
{{Committee_Treasurer_Name}}
15. By-Laws
Particulars of any by-laws made by the owners corporation within the 6 month period before the date of the Certificate that have not been lodged at the office of the Registrar-General as at that date-
{{By_Law_Reference}}

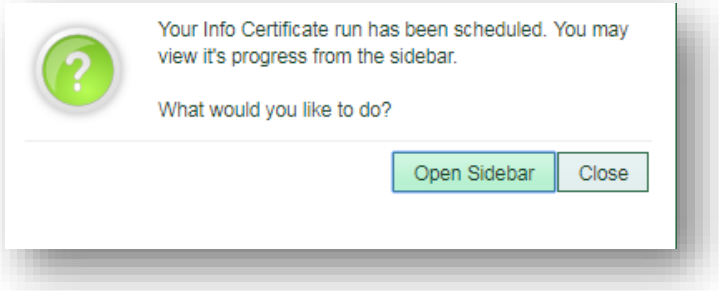
NSW SECTION 26 CERTIFICATE

1. The date will default to today's date but you can alter on the calendar if you need to
2. Click in the circle to indicate whether a Notice has been issued under Section 49
3. Type the Section 49 details
4. Type the by law reference here
5. You can click in boxes to select lots individually or click in the box on the top line to select all
6. Click Save to save the information on the screen so you can come back later and complete the certificates
7. Click Preview to preview the certificates. This will create a job in your task bar
8. Click Generate and Save when you are ready. You will have the option to produce an individual PDF. for each certificate. This will create a Zip file, from which you can print each certificate separately or a bulk PDF

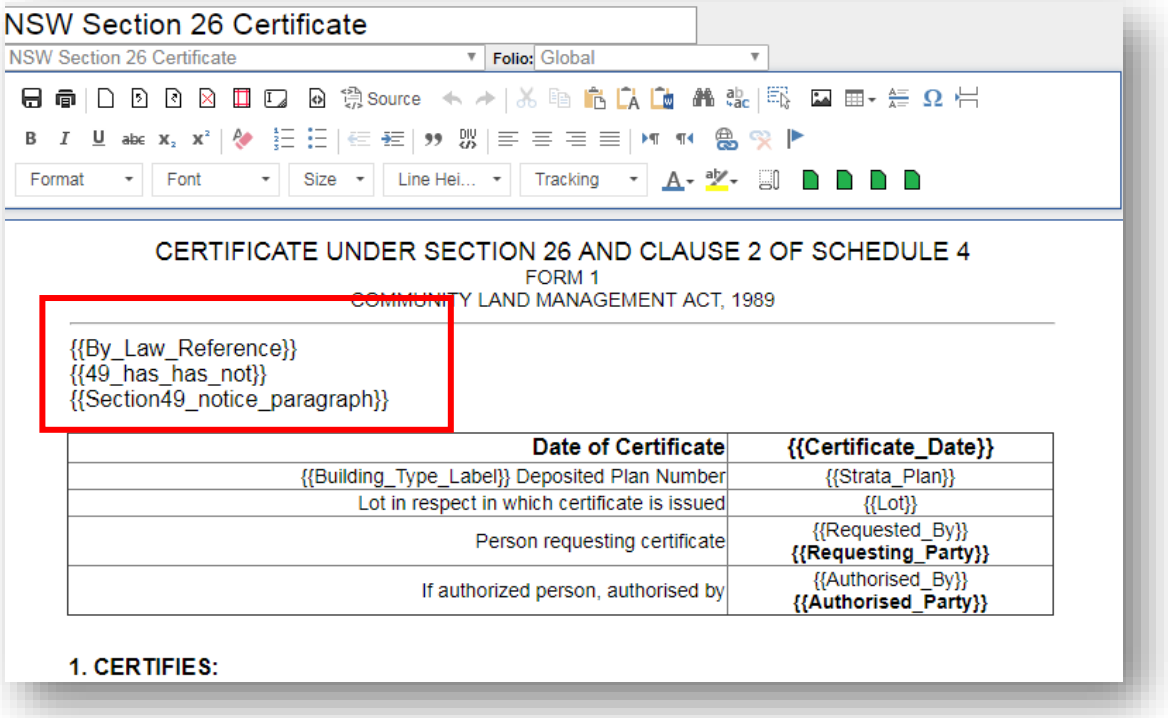




A job will be created in your Job Centre

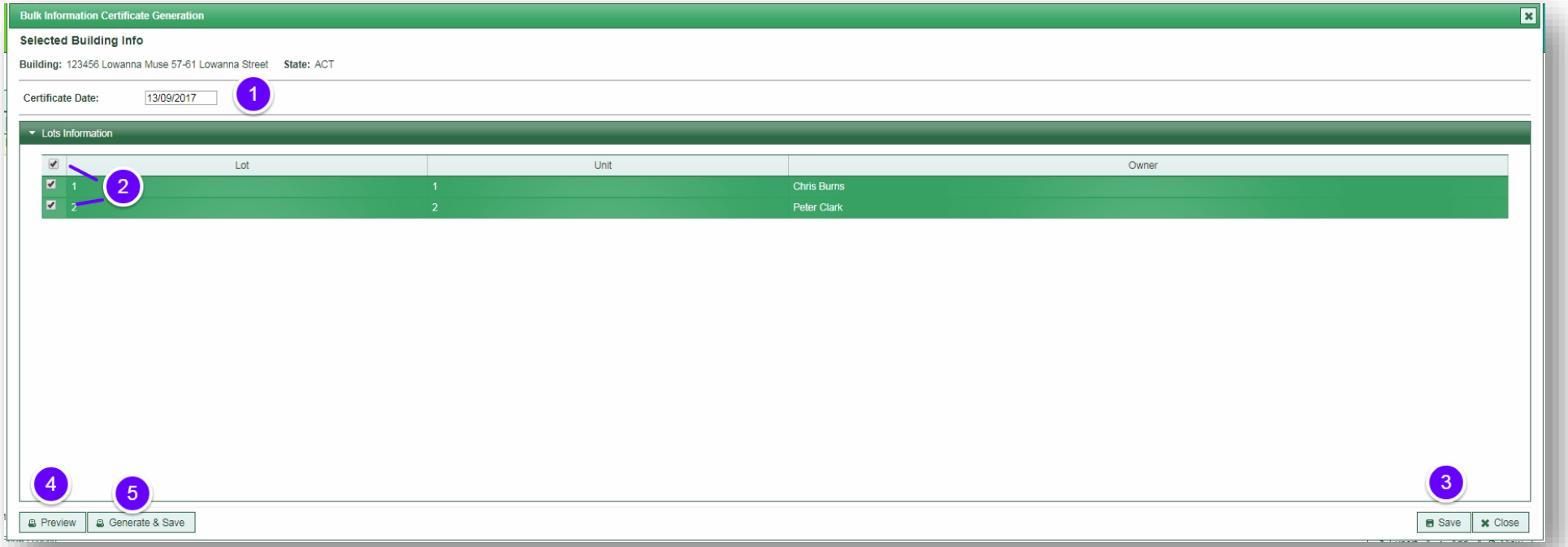


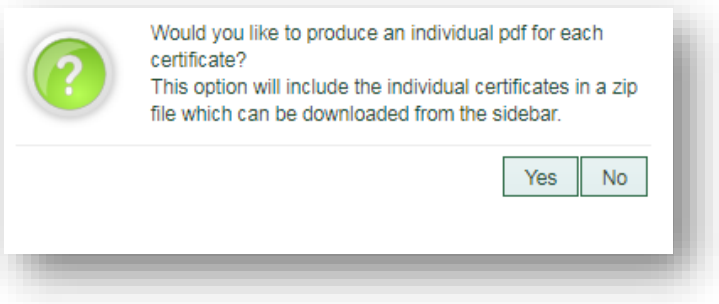
Your Section 26 Template needs to have the following merge fields
{{By_Law_Reference}}
{{49_has_has_not}}
{{Section49_notice_paragraph}}



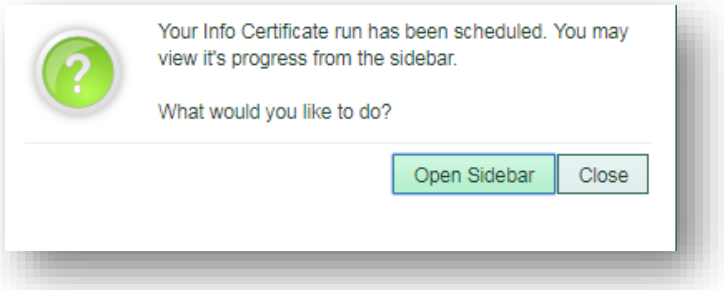
ACT – SECTION 119 CERTIFICATE

1. The date will default to today's date but you can alter on the calendar if you need to
2. You can click in boxes to select lots individually or click in the box on the top line to select all
3. Click Save to save the information on the screen so you can come back later and complete the certificates
4. Click Preview to preview the certificates. This will create a job in your task bar
5. Click Generate and Save when you are ready. You will have the option to produce an individual PDF Click Generate and Save when you are ready. You will have the option to produce an individual PDF. for each certificate. This will create a Zip file, from which you can print each certificate separately or a bulk PDF





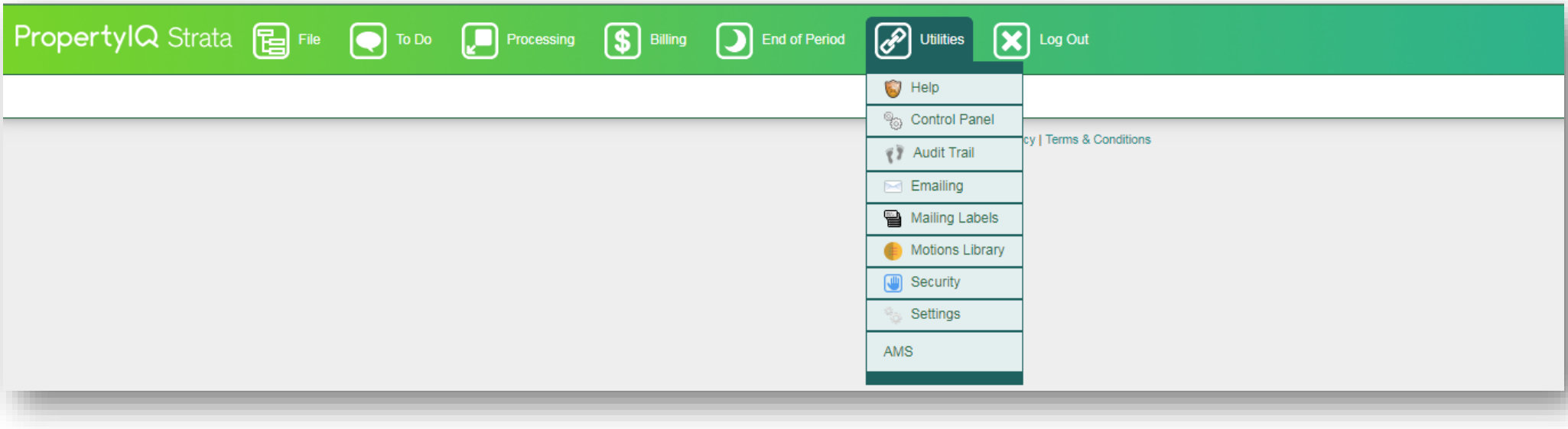
A job will be created in your Job Centre



ITEMS 3 AND 4 - ADDED FEATURES FOR SUPPLIER COMPLIANCE

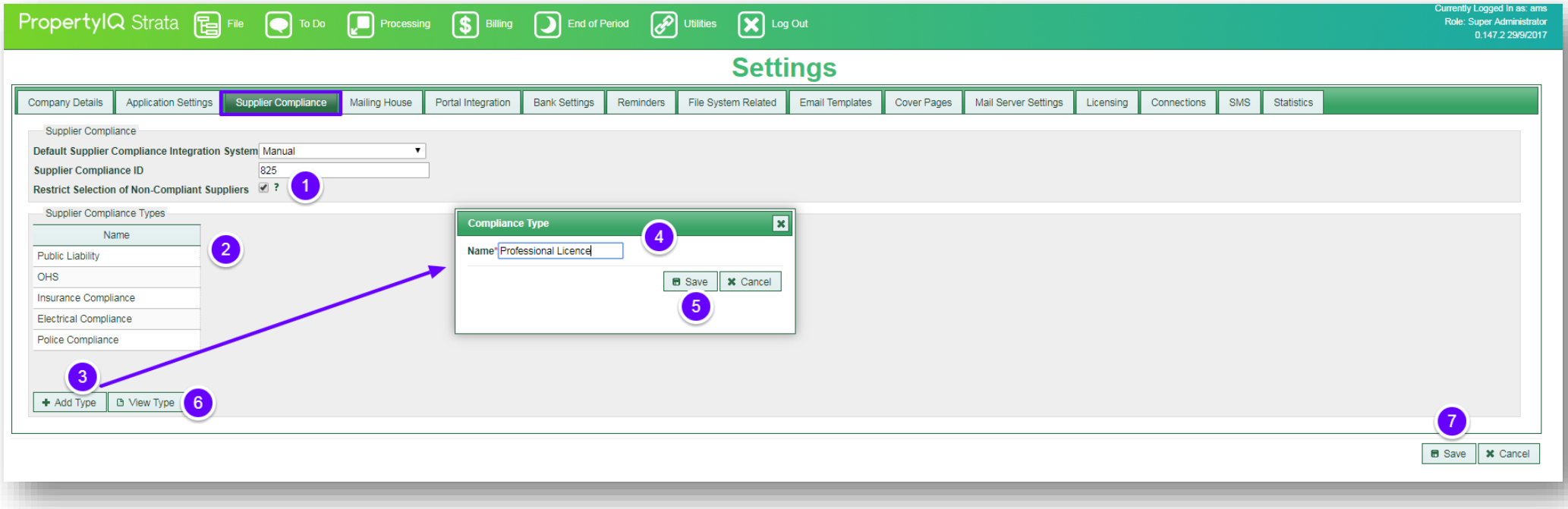
The first step is to set up the supplier compliance tab

Go to Utilities and select Settings

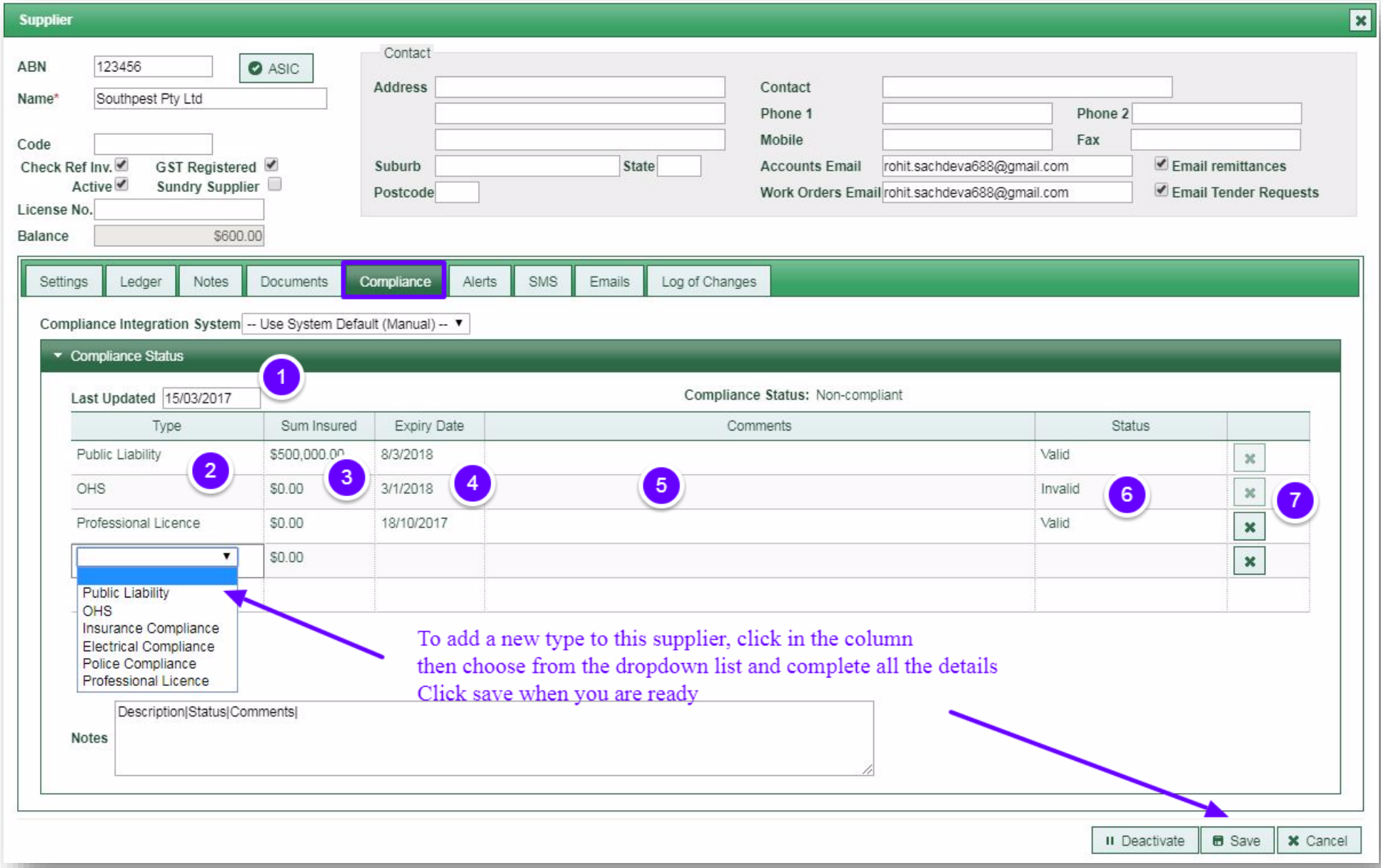


Then Select the Supplier Compliance Tab

1. There is now a new tick option to restrict the selection of suppliers whose compliance is not valid. If you tick this box, non-compliant suppliers will not be selectable for work orders, quote requests or invoices
2. You can now enter your own compliance types – the names of existing compliance types appear in this list
3. Click on the Add Type button to add a new compliance type
4. Type a name for the new compliance type
5. Click Save when you are ready
6. Click on the view type button to open the type and edit it
7. Click save to save your changes.



1. Supplier Card Compliance Tab now shows more detail
2. “last updated” date shows here
3. The Type of compliance shows in this column
4. You can enter a sum insured in this column if applicable
5. Enter the expiry date for the cover here
6. You can enter comments here (optional)
7. Choose the status of the compliance from the dropdown list
8. You can remove a line item by clicking on the cross
9. To add a new compliance item, choose the type from the dropdown list, enter the details and then click Save


Supplier
ABN 123456
ASIC
Name* Southpest Pty Ltd
Code
Check Ref Inv.
GST Registered
Active
Sundry Supplier
License No.
Balance $600.00
Contact
Address
Suburb
State
Postcode
Contact
Phone 1
Phone 2
Mobile
Fax
Accounts Email rohit.sachdeva688@gmail.com
Email remittances
Work Orders Email rohit.sachdeva688@gmail.com
Email Tender Requests
Settings
Ledger
Notes
Documents
Compliance
Alerts
SMS
Emails
Log of Changes
Compliance Integration System -- Use System Default (Manual) --
Compliance Status
1
Last Updated 15/03/2017
Compliance Status: Non-compliant
Type
Sum Insured
Expiry Date
Comments
Status
Public Liability
$500,000.00
8/3/2018
Valid
2
OHS
$0.00
3
3/1/2018
4
5
Invalid
6
7
Professional Licence
$0.00
18/10/2017
Valid
$0.00
Public Liability
OHS
Insurance Compliance
Electrical Compliance
Police Compliance
Professional Licence
To add a new type to this supplier, click in the column
then choose from the dropdown list and complete all the details
Click save when you are ready
Notes
Description|Status|Comments|
Deactivate
Save
Cancel

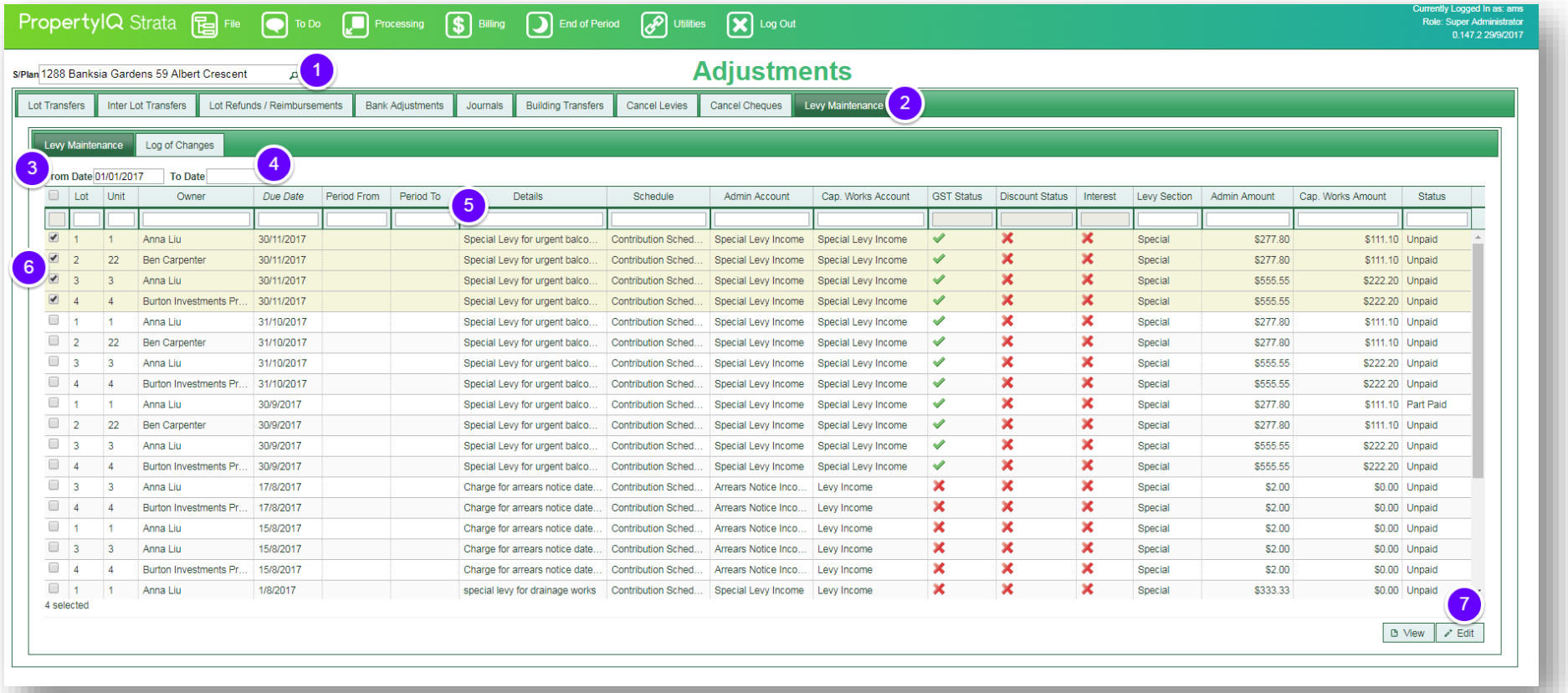
ITEM 5 LEVY MAINTENANCE SCREEN AND LEVY LOG OF CHANGES

The levy Maintenance Screen is accessed from Processing>Adjustments and selecting the Levy Maintenance screen. You can view and edit levies singly or in bulk.

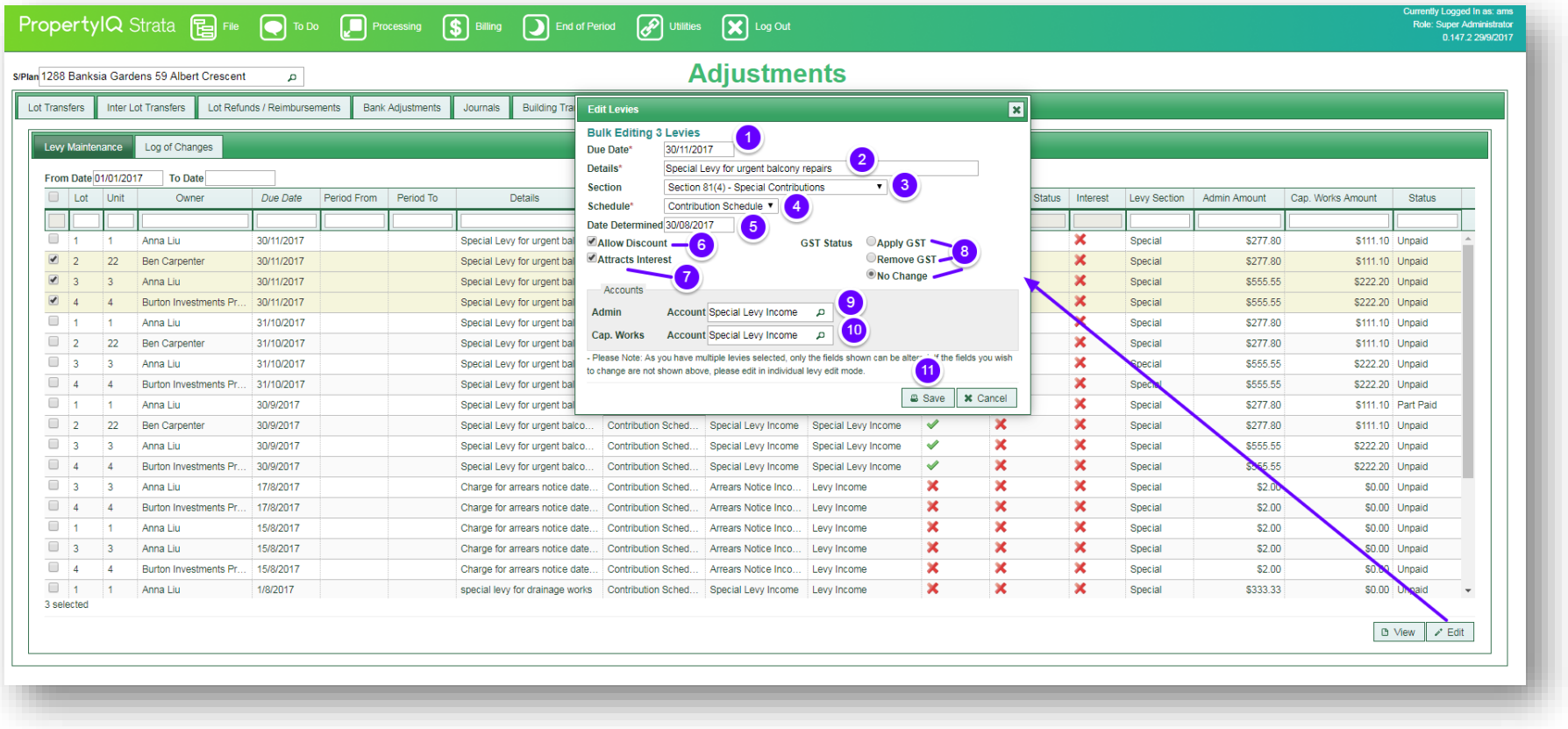
You can’t alter any of the dates on a levy unless it is wholly unpaid.

TO BULK EDIT LEVIES

1. All adjustments must be done for a single Building at a time, so select your Building first
2. Go to the Levy Maintenance Tab
3. Levy maintenance is the default
4. You can click on the boxes to open the calendar and select a date range
5. Type some key letters in any of the empty boxes on the top line to refine your search
6. Click in the boxes to select the levies you want to edit (you can click on the top line to select all on screen)
7. Click Edit to bulk edit the levies

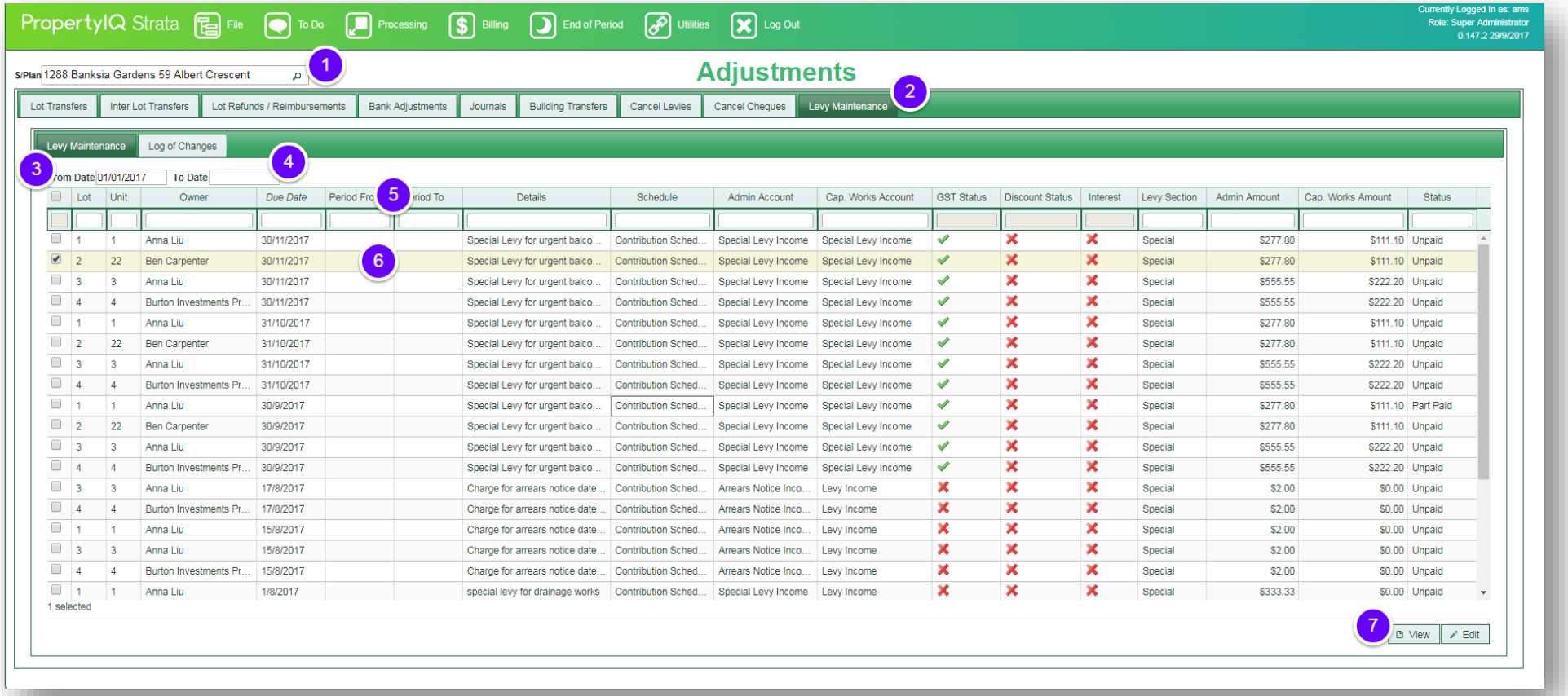


1. The calendar will open once the edit levies box pops up
2. You can overtype the details here
3. You can alter the section under which the levy is struck by clicking on the dropdown menu and choosing a different section
4. If the Building has more than one Contribution Schedule, you can alter the schedule the levy is for by clicking on the dropdown menu and choosing a different schedule
5. You can alter the date determined by clicking in the box to open the calendar and enter a new date determined
6. Click in the Allow Discount box to alter the discount status
7. Click in the Attracts Interest box to alter the interest status
8. Click on the circles to alter the GST status
9. Click on the Search icon to alter the Chart of Accounts Code any admin amounts are allocated to
10. Click on the Search icon to alter the Chart of Accounts Code any Capital Works amounts are allocated to
11. Click Save to save your changes when you are ready.

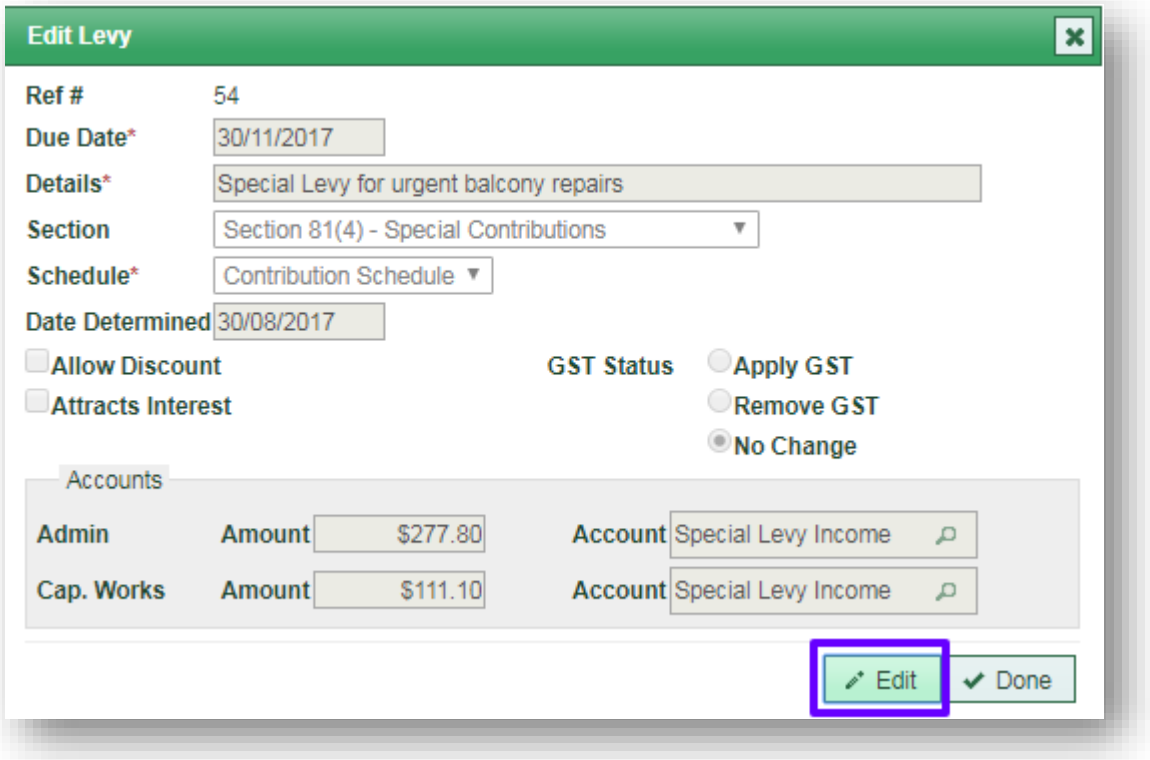


VIEWING AND EDITING A SINGLE LEVY

1. All adjustments must be done for a single Building at a time, so select your Building first
2. Go to the Levy Maintenance Tab
3. Levy maintenance is the default
4. You can click on the boxes to open the calendar and select a date range
5. Type some key letters in any of the empty boxes on the top line to refine your search
6. Click in one of the boxes on the left to select the levy you want to view and edit
7. Click View to view the levy you have selected

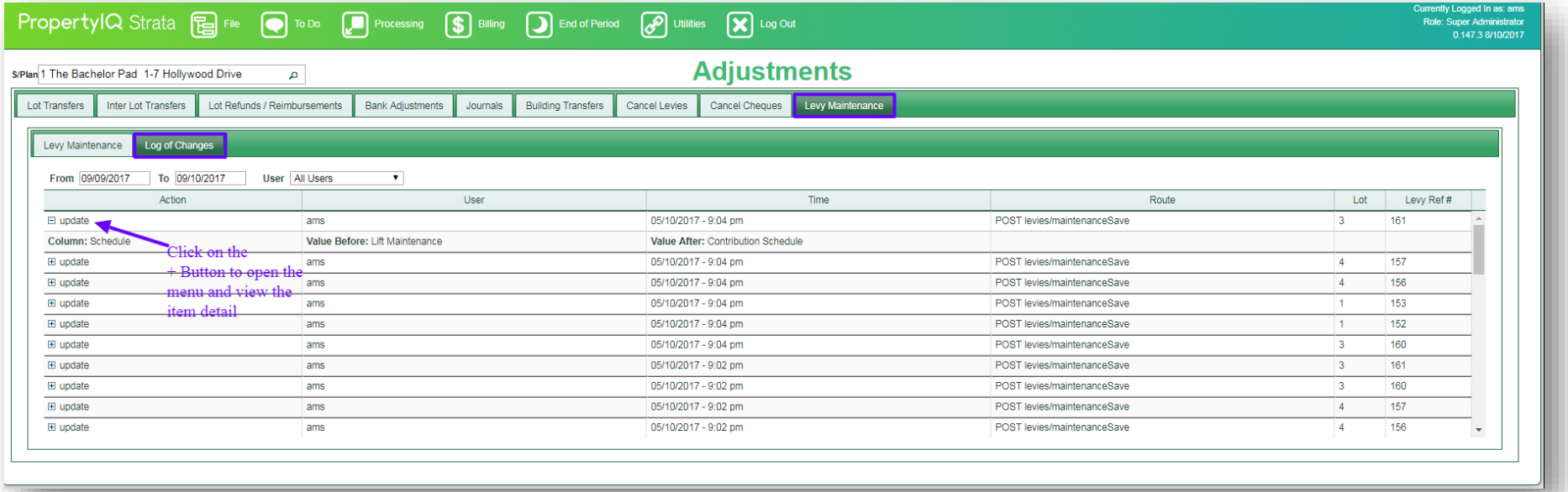


The Levy box will pop up and you can click on Edit to edit the single levy

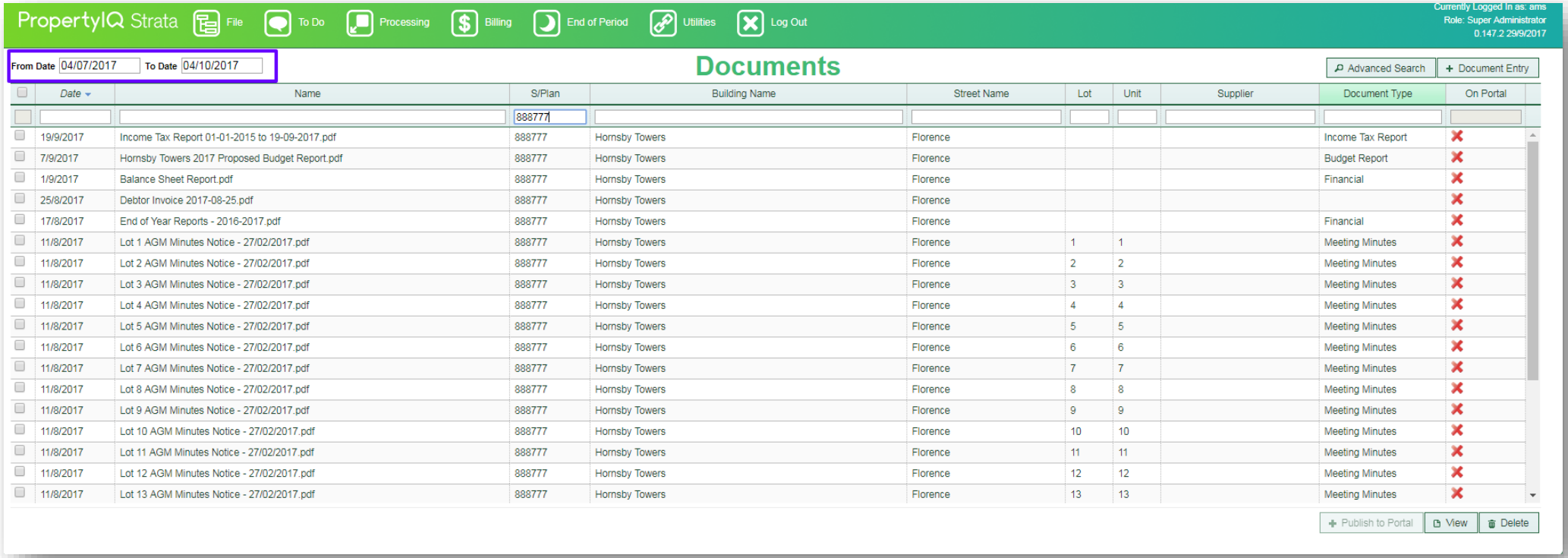


LEVY MAINTENANCE LOG OF CHANGES

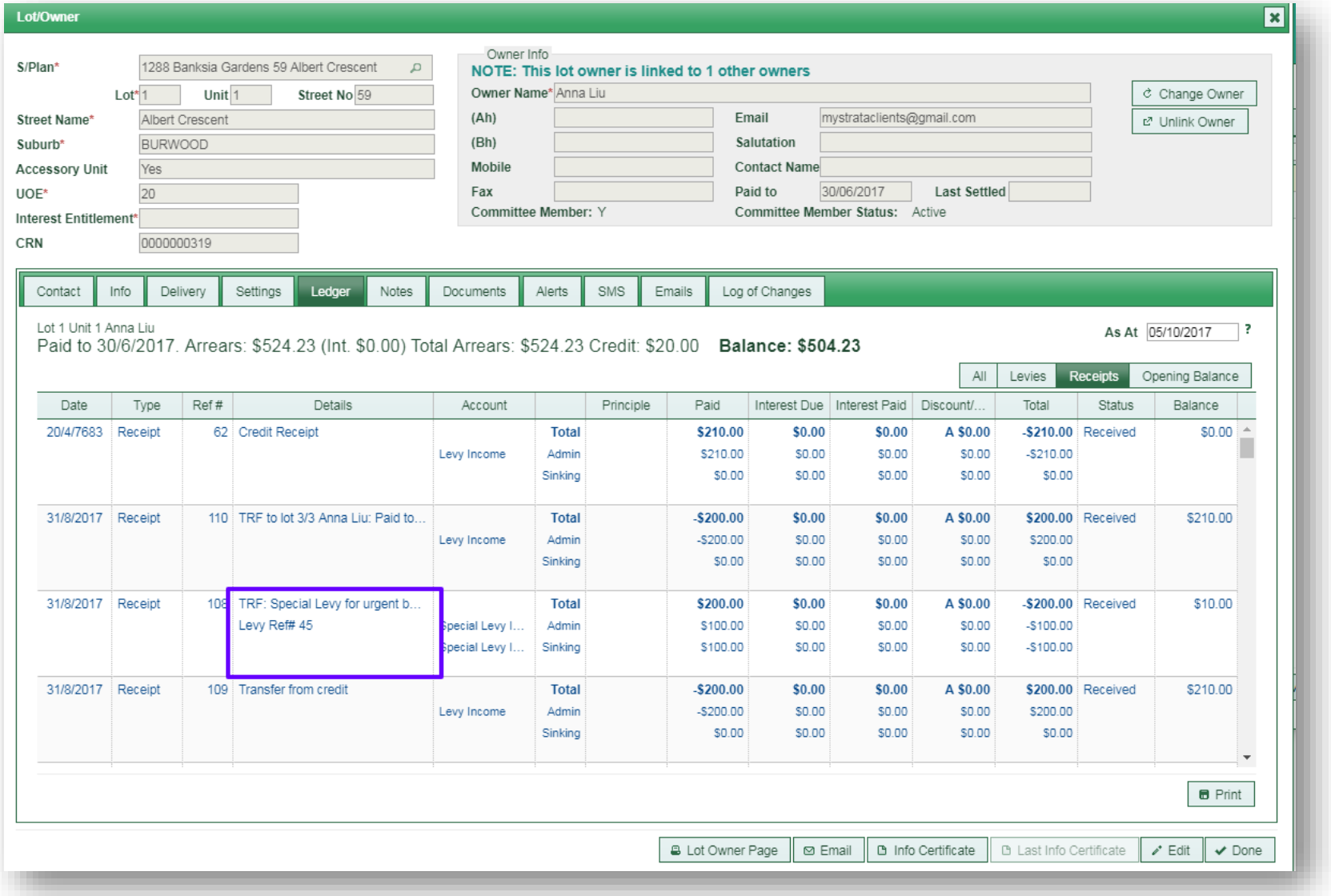
The Log of changes tab records all changes that have been made to levies.



ITEM 9 DATE RANGE FILTER FOR DOCUMENTS SCREEN

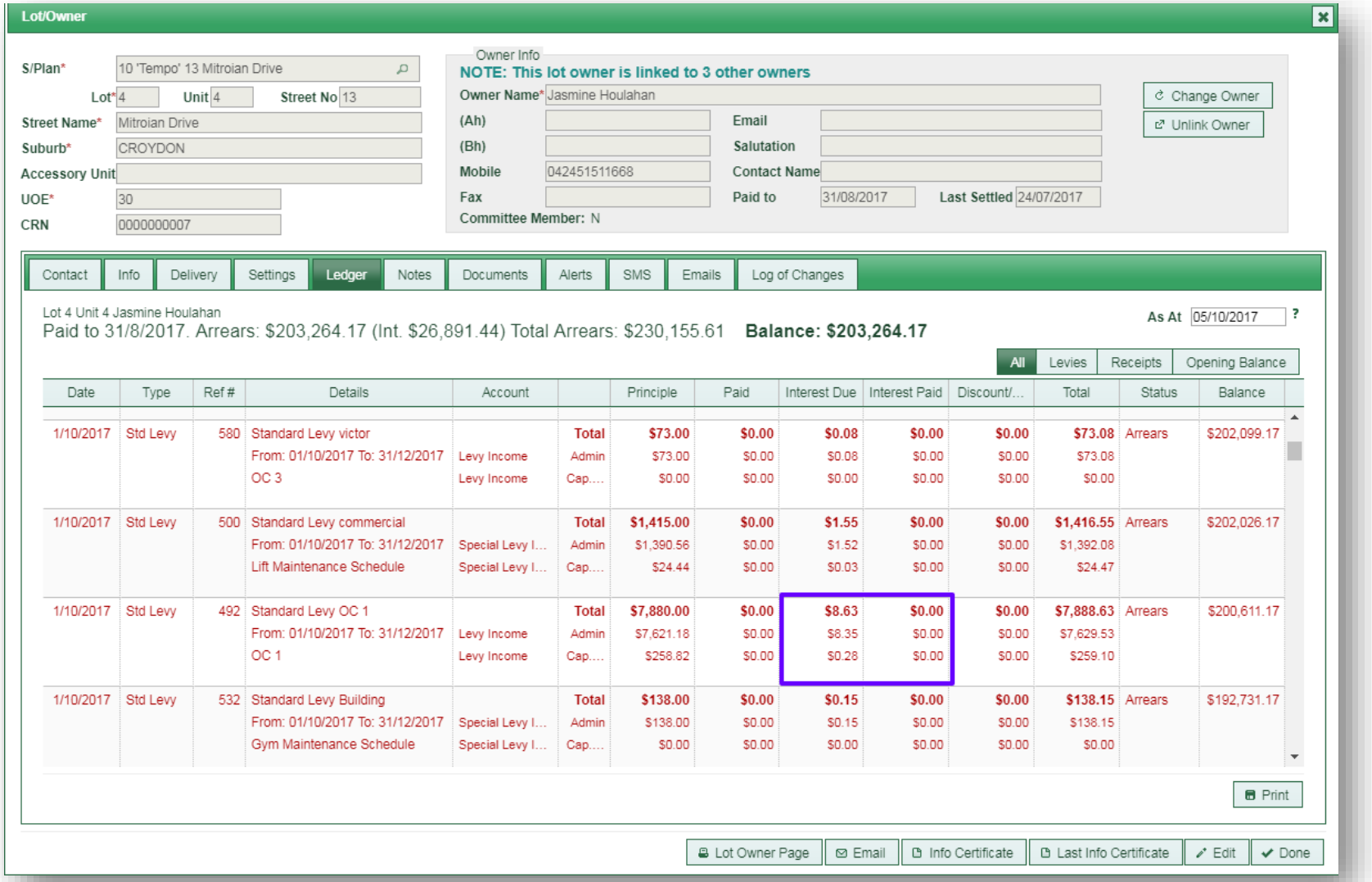


ITEM 23 – LOT OWNERS LEDGER NOW SHOWS THE LEVY REFERENCE NUMBER IN THE DETAILS COLUMN FOR A RECEIPT



ITEM 27 CHANGES TO THE WAY INTEREST IS SHOWN ON A LOT OWNER'S LEDGER

The Lot Owners Ledger now shows two columns relating to interest – the interest paid on a levy and the interest outstanding to give you a clearer picture of the current status of any interest charges.

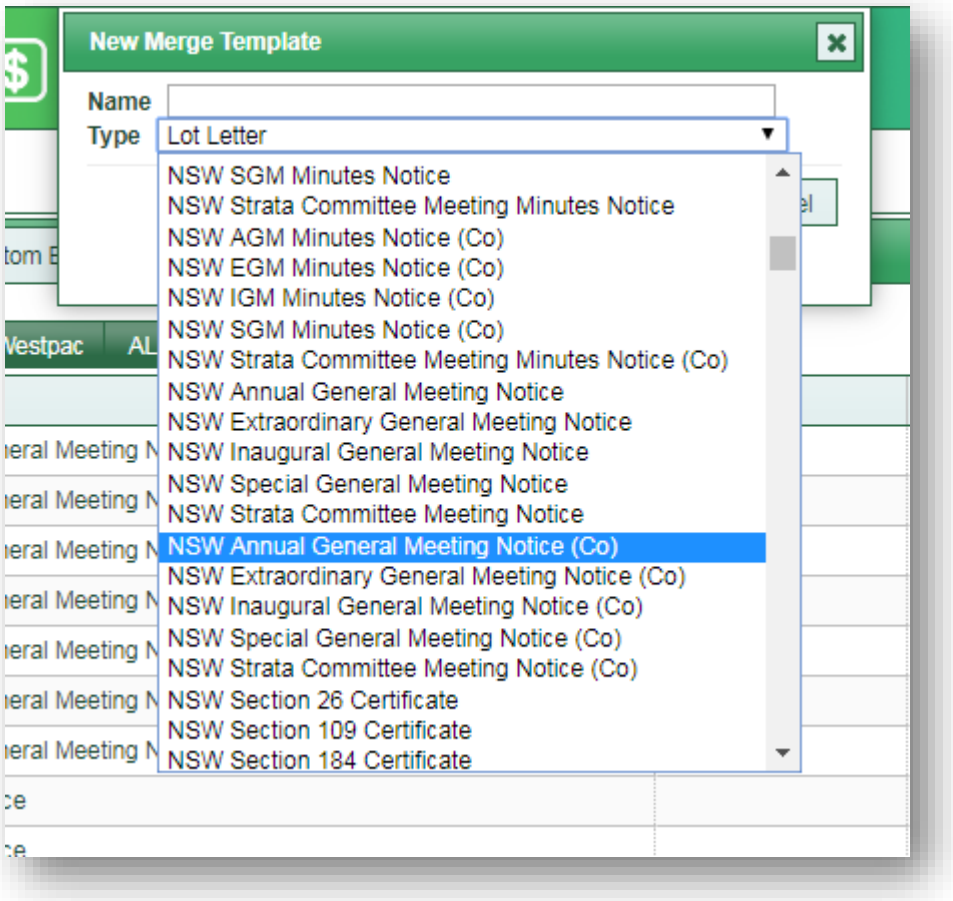


ITEM 28 – NEW MEETING TEMPLATES AVAILABLE FOR COMPANY TITLE BUILDINGS

You can now create new meeting notice and minutes templates for company title buildings.

This is set up from Templates>Standard Merge Templates> +New and select the relevant template type. All company title templates have (Co) appearing in their name.

Once the template has been created, you will need to tick it as the default standard merge template.

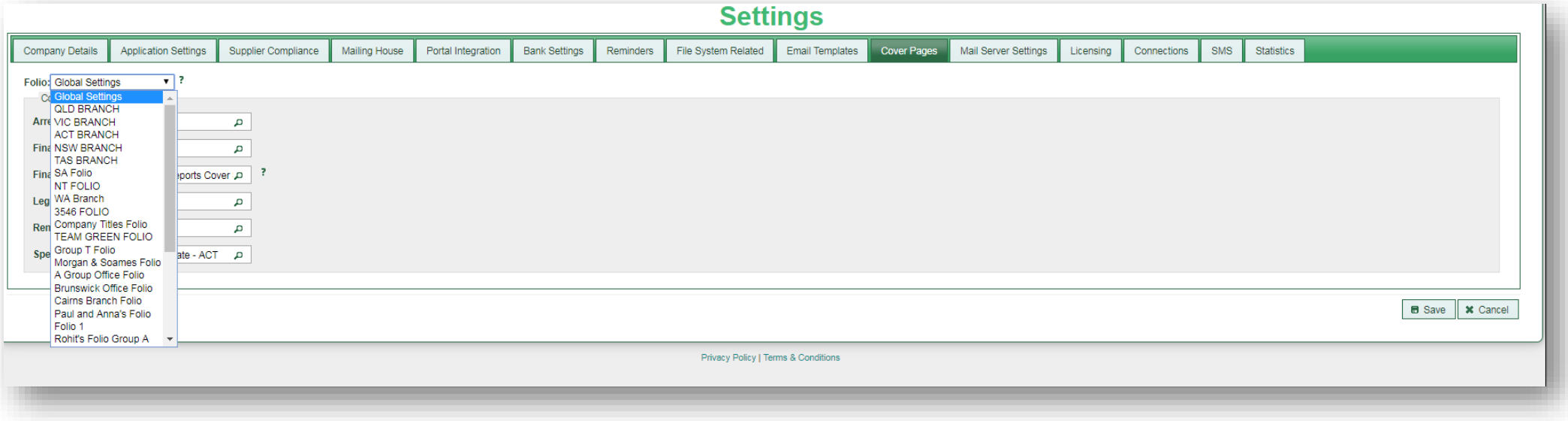
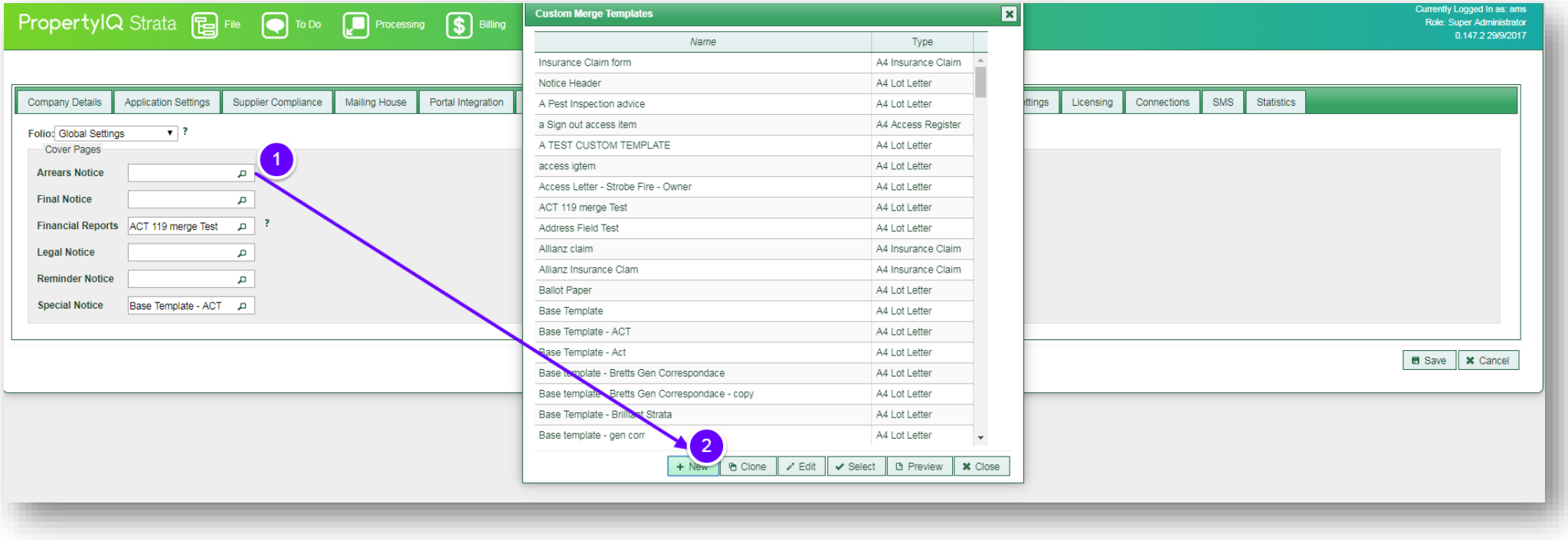


ITEM 38 FOLIO SPECIFIC COVER PAGES

If you use Folios in your company you can now create Folio specific cover pages. To set up Folio Specific Cover Pages, go to Utilities>Settings and the Cover Pages tab

Choose the Foliio you want to set Cover Pages for and then click on the search icon to attach the template you want.

this will be a Custom Merge Template – you can either set it up prior or set up as you go.



1. Click on the search Icon to get started
2. Click on New to create a new template – or you can choose or clone an existing template