PropertyIQ Strata

Release Notes Version 151.5-153.1

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SUMMARY	
New Features	1. Building Card>Budget. Changes to Set Budget screens. The Set Budgets screen has changed. The proposed instalments now do not show on the main Set Budget Screen. A new button, Set Instalments, now shows at the bottom of the Set Budget screen. Clicking on this button takes you to the Set Instalments, Print Budget and Accept Budget options. 2. Lot owner Card>Delivery options. An issue when saving a change to a lot owner card from" owner occupier" and adding tenant details, was causing an error, has now been fixed. 3. Insurance Claims. Sending an insurance claim document. An issue where Insurance claim documents were not always being delivered when sending from the insurance claim, has now been fixed. 4. Building Card>Charges. Changes to Variable Charges for Quotes. The two choices now work like this: • Quote charge per work order – regardless of the number of quotes you obtain, when you generate a quote request, then a single charge for the amount you enter in your charge schedule will be applied. The date the charge is triggered is the date you generate a quote request. • Quote charge per quote request – a charge is generated for each quote request you send. For example, if you request 3 quotes, then you will receive three charges. The date the charge is triggered is the date you generate each quote request. 5. Meetings>Sending Minutes. An issue when sending AGM minutes if the "Include Annual Levy Notices with Minutes" tick box was checked in application settings, that was causing an error, has now been fixed. 6. Debtor Transactions. Improvements to Debtor transactions: • Debtor receipts now show on the cashbook enquiry screen • Debtor receipts now show on the cashbook report • You can now print a debtor receipt by clicking on the item in the cash book enquiry page and then clicking print at the bottom of the page. 7. Debtor Transactions. Debtor Invoice delivery Improvements. When you create a debtor invoice, it will now be delivered immediately, via the delivery method ticked on the debtor's card. If the debtor is ticked to receive their invoices by email, then the email will be sent immediately. If the debtor is ticked to receive their invoices by post, then a PDF will be generated immediately. If you use Bing Mailing house to process your mailing, then a job will be sent to Bing immediately. This change applies to debtor invoices that are created from the debtor transactions screen as well as debtor invoices that are created from the Access Register screen. 8. Lots Owners. Some issues when adding Lots Owners and using the duplicate lots option, where the screens were not closing as expected, have now been fixed. 9. Improvements to clarify the meaning of "Generate" throughout the program. You now receive a warning pop up whenever you click Generate to warn you that you are about to generate an item that can't be undone. 10. Settings. There is a new settings tab – Meetings. This area allows you to set your preferences for meetings in one area. Settings that relate to meetings that used to be on the Application Settings tab now all show under the new Meetings tab. There is a new setting to allow you to exclude the details of the user that generated the meeting and the time the meeting report was generated. 11. Minutes>Minutes Motions Report. More merge fields available in the Minutes Motions report. Three merge fields, Committee_Sec_Name (the current committee member(s) who is the secretary, the Committee_Chair_Name (the current committee member(s) who is the

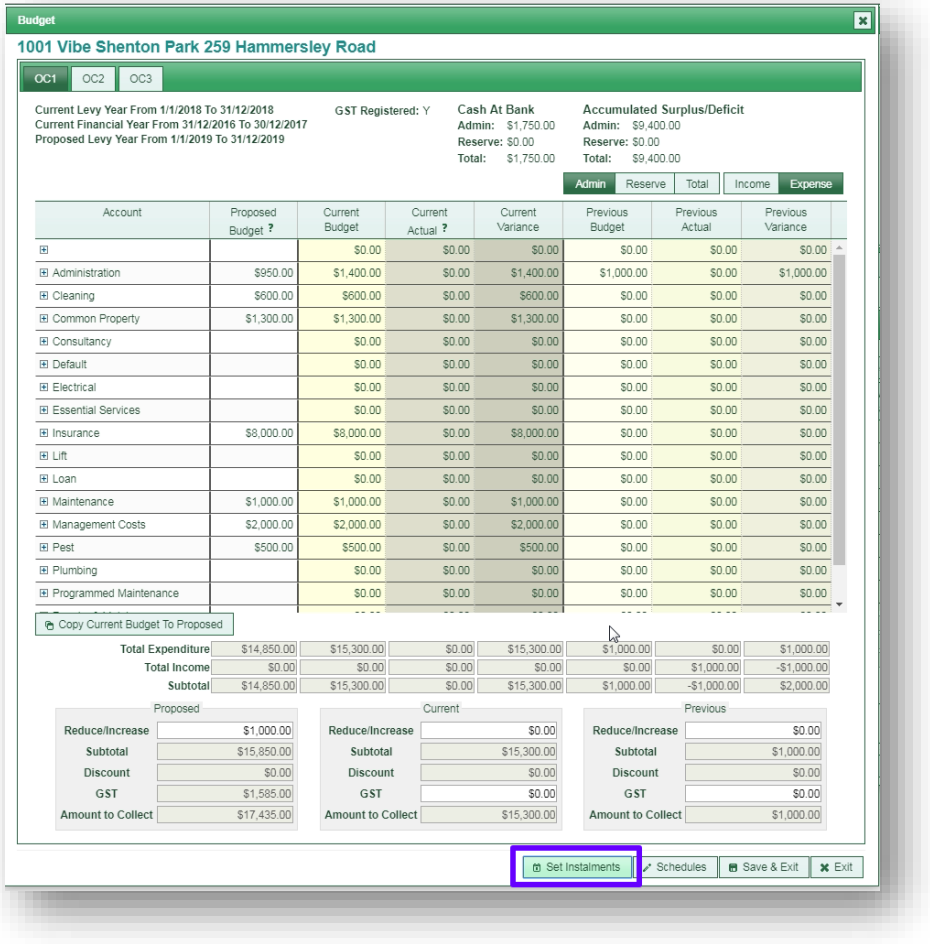
	chairperson and the Committee_Treasurer_name (the current committee member(s) who is the Treasurer and also the Meeting_End_Time merge field. 12. Meetings>Attendance sheet. When you lock the owner information in a meeting, and tick that a quorum has been reached, the attendance sheet now shows whether a quorum has been reached. This is to save an extra page being generated just to show the quorum statistics. 13. Financial Reports. An issue with the balance sheet and income and expense reports, where the "last year's actuals" figures were showing incorrectly in some circumstances, has now been fixed. 14. Financial Reports. An issue where the closing balance shown on an income and expense report was not correct when there are balances against equity accounts for a building, has now been fixed. 15. Settings>Application Settings – The setting - "Accumulate Surplus/Deficits on reports", has been renamed to "Show Opening and Closing Balance on Income and Expenditure Reports". If this is ticked, your income statement reports will show the accumulated figures and the setting will no longer affect the balance sheet. The balance sheet now shows opening balance plus net income for the period, whether or not you have this setting ticked. 16. End of Period>Building Year End. If you try to process a Building Year End when the end of the new financial year is prior to building's opening balance date or beginning of its current financial year date, then you will no longer be able to process this. You now receive a popup to advise you that you can't proceed. 17. End of period>Building Year End. Financial reports improvements. When conducting an end of year rollover and you alter the existing end of financial year date (for example, to extend it to 18 months) the financial reports generated by the financial year rollover now reflect the new altered end date. 18. For API Users – Documents relating to a lot can now be retrieved via the API

DETAILED SCREENSHOTS

ITEM 1 - CHANGES TO THE SET BUDGET SCREEN

The Set Budgets screen now has a new layout. When you have finished entering the proposed budget figures, click on “Set Instalments” to take you to the instalments screen, the recalculate options, the print budget option and the Accept Budget option.

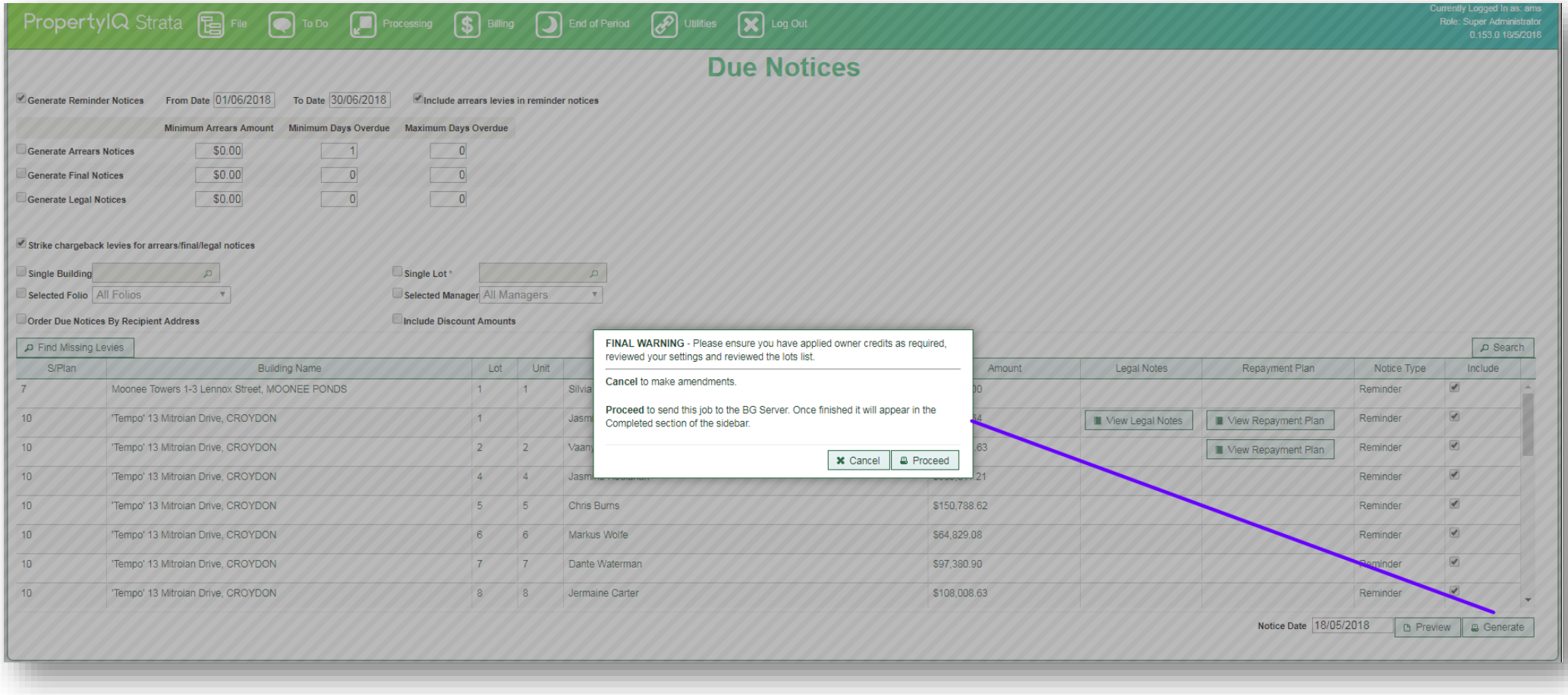
Step 1 – Click on Set Instalments

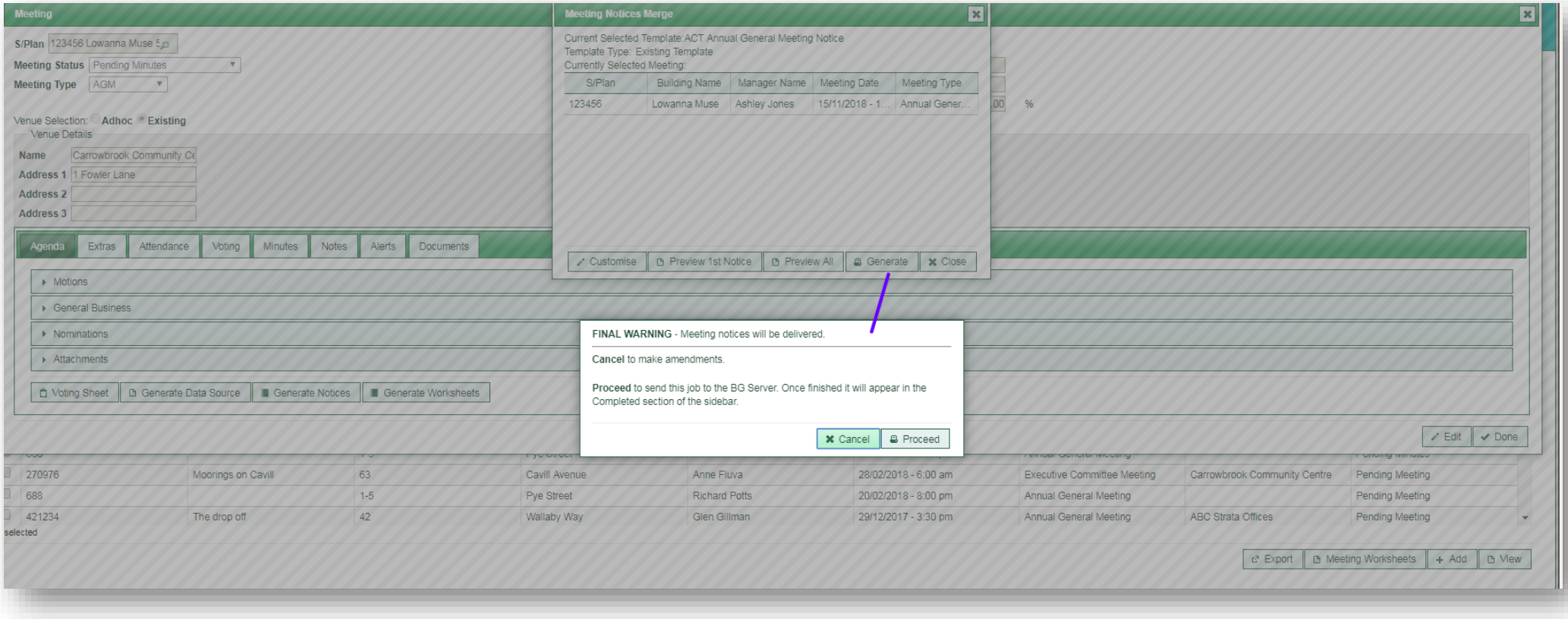


Screen 2 – Recalculate, View and edit instalments, Print and Accept Budget (Note – you can still Save and Exit or Exit from this screen if you are not ready to accept the budget.

ITEM 9 - GENERATE BUTTON NOW PROVIDES A CLEARER MESSAGE THROUGHOUT THE PROGRAM

When you click on generate and the action you are generating can't be undone, for example, sending Due Notices or meeting notices - clicking on Generate now triggers a popup warning.

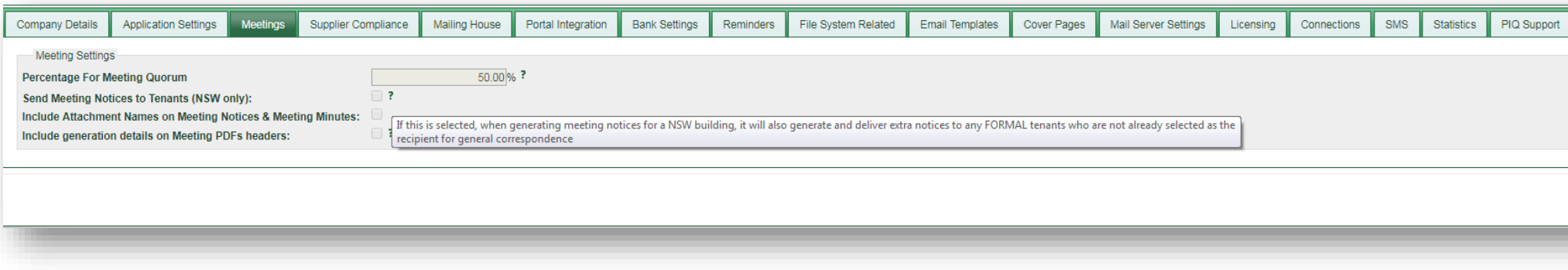



Meeting
S/Plan 123456 Lowanna Muse
Meeting Status Pending Minutes
Meeting Type AGM
Venue Selection: Adhoc Existing
Venue Details
Name Carrowbrook Community Ce
Address 1 1 Fowler Lane
Address 2
Address 3
Agenda
Extras
Attendance
Voting
Minutes
Notes
Alerts
Documents
Motions
General Business
Nominations
Attachments
Voting Sheet
Generate Data Source
Generate Notices
Generate Worksheets
Meeting Notices Merge
Current Selected Template:ACT Annual General Meeting Notice
Template Type: Existing Template
Currently Selected Meeting:
S/Plan
Building Name
Manager Name
Meeting Date
Meeting Type
123456
Lowanna Muse
Ashley Jones
15/11/2018 - 1...
Annual Gener...
Customise
Preview 1st Notice
Preview All
Generate
Close
FINAL WARNING - Meeting notices will be delivered.
Cancel to make amendments.
Proceed to send this job to the BG Server. Once finished it will appear in the Completed section of the sidebar.
Cancel
Proceed
Edit
Done
270976 Moorings on Cavill 63 Cavill Avenue Anne Fluva 28/02/2018 - 6:00 am Executive Committee Meeting Carrowbrook Community Centre Pending Meeting
688 1-5 Pye Street Richard Potts 20/02/2018 - 8:00 pm Annual General Meeting Pending Meeting
421234 The drop off 42 Wallaby Way Glen Gillman 29/12/2017 - 3:30 pm Annual General Meeting ABC Strata Offices Pending Meeting
selected
Export
Meeting Worksheets
Add
View

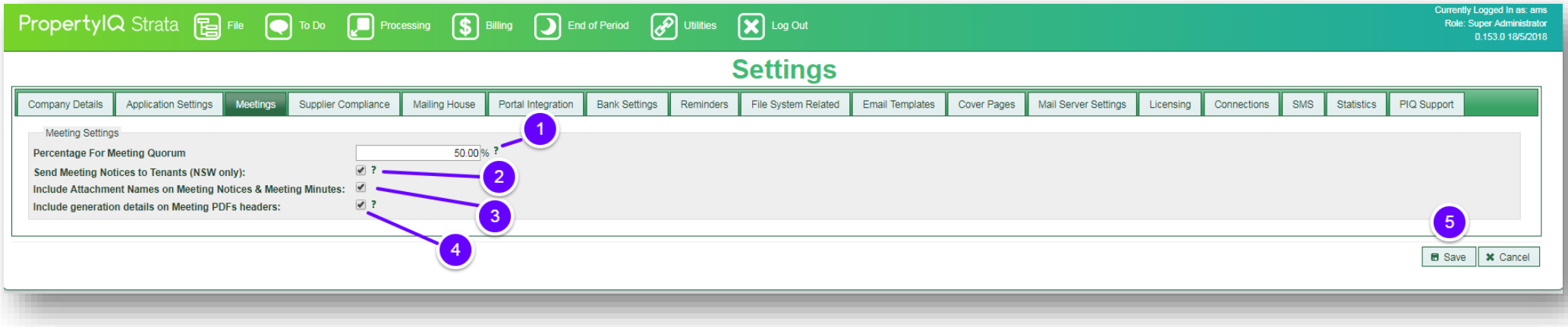
ITEM 10 - NEW TAB IN SETTINGS – MEETINGS

There is a new tab in Settings called Meetings. This allows you to manage all the settings that relate to meetings in one place. Any settings relating to meetings that used to appear in the Application Settings tab now appear under the new Meetings Tab. You can hover your mouse over the question marks to see an explanation of what the setting means.

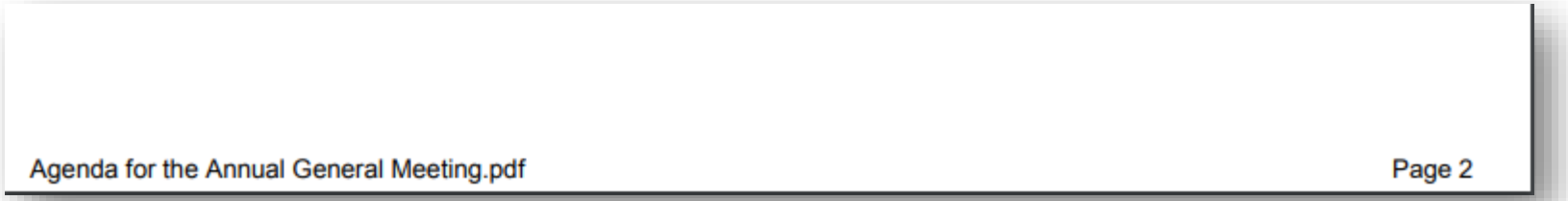
1. The default percentage of lot owners required to achieve a quorum is entered here. (you can override for an individual meeting if you need to)
2. If this box is ticked, when generating meeting notices for a NSW building, it will also generate and deliver extra notices to any formal tenants who are not already selected as the recipient for general correspondence.



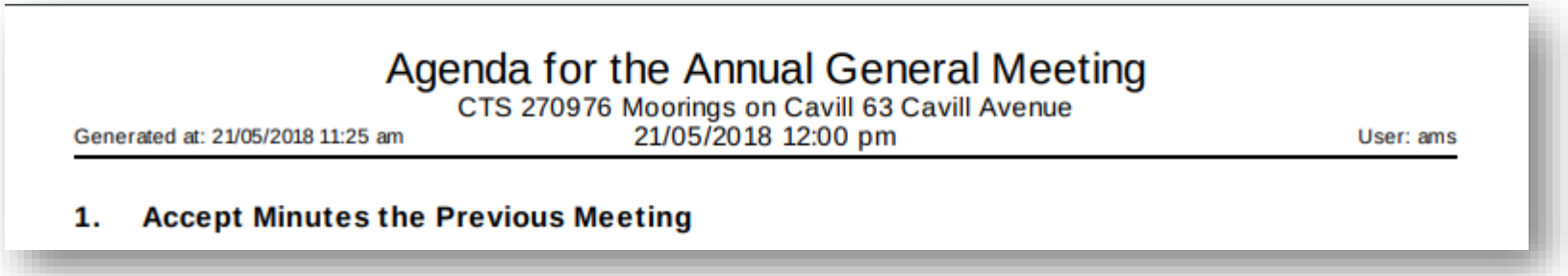
3. If this box is ticked, then the name of any reports that are attached to the meeting show the name of the attachment
4. If this box is ticked, then the generation details (the user that generated the report and the time it was generated) will appear on all meeting document attachments



If the setting “Include attachment names Meeting Notices and Meeting Minutes” is ticked, then the name of any reports that are attached to the meeting show the name of the attachment at the bottom of the page.



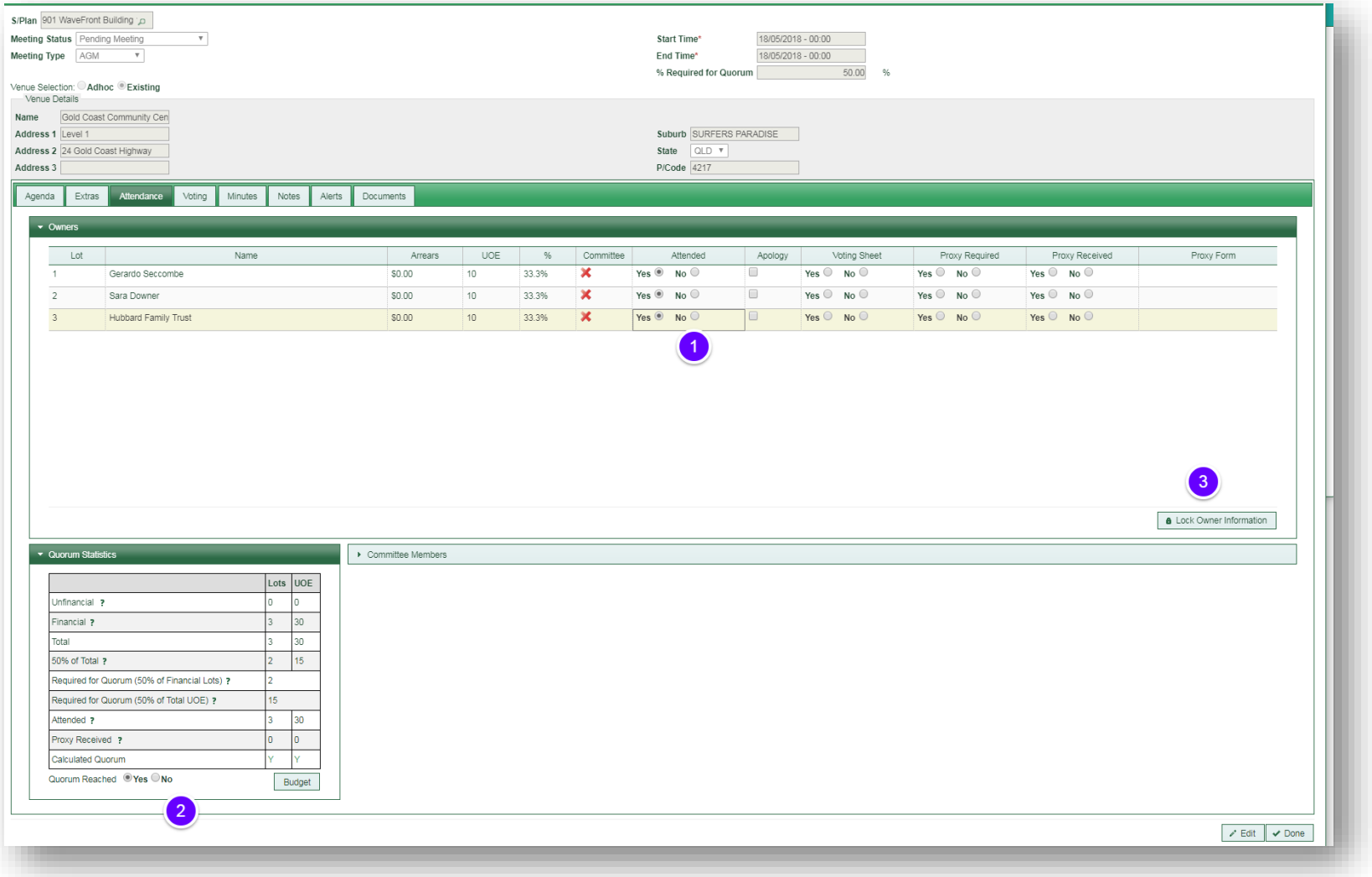
If the setting “Include generation details on Meeting PDFs headers” is ticked, then the details of the user that generated the report and time it was generated show on the attachment at the top of the page.



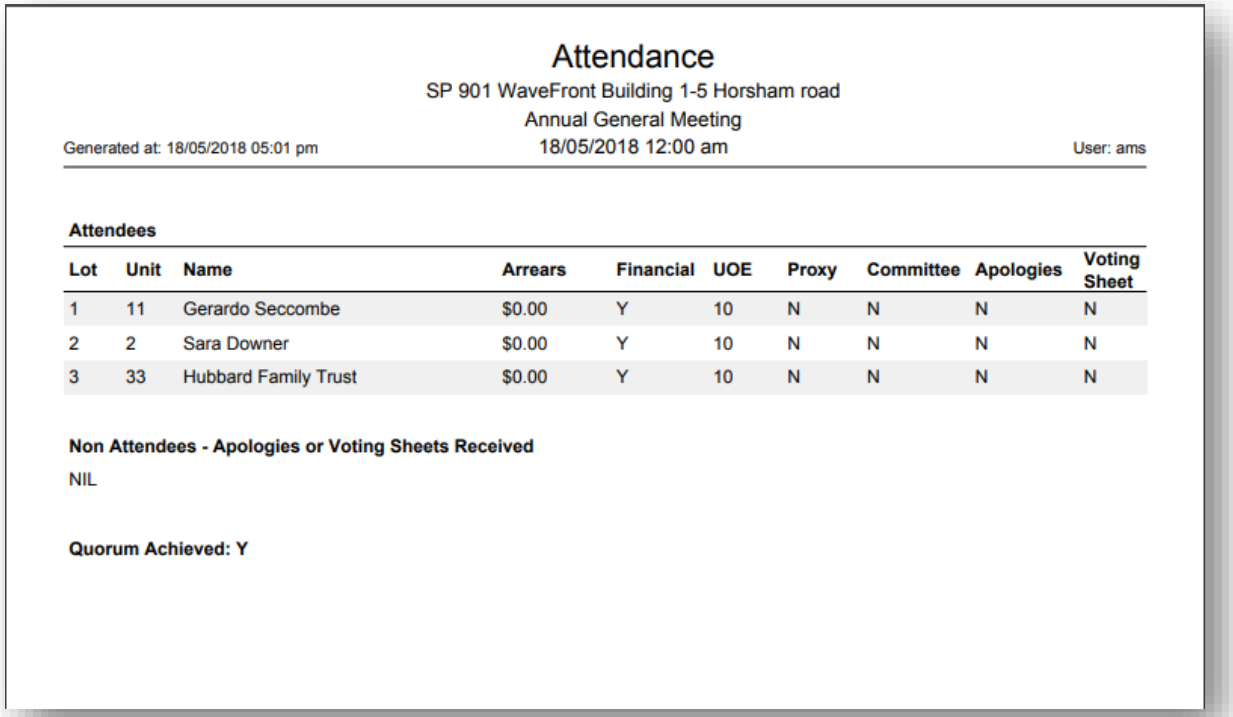
ITEM 12 -THE MEETING ATTENDANCE SHEET NOW SHOWS WHETHER A QUORUM HAS BEEN ACHIEVED

To save printing a separate sheet showing the quorum statistics, the attendance sheet now includes whether or not a quorum has been achieved.

1. Record which owners are in attendance
2. Click to record whether a quorum has been achieved
3. Click Lock owner information



The Attendance sheet now shows whether a quorum has been achieved



Attendance

SP 901 WaveFront Building 1-5 Horsham road

Annual General Meeting

Generated at: 18/05/2018 05:01 pm — 18/05/2018 12:00 am — User: ams

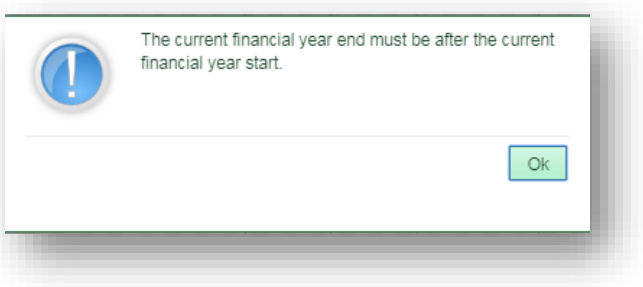
Attendees

Lot	Unit	Name	Arrears	Financial	UOE	Proxy	Committee	Apologies	Voting Sheet
1	11	Gerardo Seccombe	$0.00	Y	10	N	N	N	N
2	2	Sara Downer	$0.00	Y	10	N	N	N	N
3	33	Hubbard Family Trust	$0.00	Y	10	N	N	N	N

Non Attendees - Apologies or Voting Sheets Received

NIL

Quorum Achieved: Y

ITEM 17 - BUILDING YEAR END

If you try to process a Building year end and enter an end date that is less than either the opening balance date for the building *or* the financial year start date, you will no longer be able to proceed and will see the following popup message: