Portal Release notes December 2019 Version 1.2.4-1.3

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SUMMARY

VICTORIAN MULTI-SCHEDULE BUILDINGS

A number of changes have been made to ensure that lot owners and committee members who belong to Victorian multi-schedule buildings only have access to information and documents that relate to the schedules they belong to.

1. The **financials page** now has a filter at the top of the so users can filter their view and select reports for any schedules they belong to. The default is the first active schedule they belong to (the order is determined by the order set on the building card>schedules) They won't see schedules they don't belong to. The new filter applies to:
   - Fund balances
   - Bank balances
   - Year on year performance

   See detailed screenshot

2. The **property details page** now has a filter at the top so users can filter their view to any schedule they belong to. view by schedule. The default is the first active schedule they belong to (the order is determined by the order set on the building card>schedules.) When the lot owner filters by schedule they will see differences in the following fields (if applicable to that schedule)
   - ABN
   - GST Status
   - List of committee members

   If a committee member belongs to two or more active schedules, they will see the filter at the top to filter their view by schedule. The default is the first active schedule they belong to (the order is determined by the order set on the building card>schedules. When the lot owner filters by schedule they will see differences in the following fields (if applicable to that schedule

   - ABN
   - GST Status
   - List of committee members

   If a committee member has not been selected to belong to any specific schedules they will see an option to filter their view by schedule, the filter list contains all the active schedules for that building but defaults to OC 1 (the order is determined by the order set on the building card>schedules. When the lot owner filters by schedule, they will see differences in the following fields

   - ABN
   - GST
   - List of committee members – However if OC 1 is being viewed, the committee members for OC 1 and those that haven't been allocated to a schedule will show.

   Note: If a schedule has no information entered in the ABN or GST fields, then the information for the building is shown

   See detailed screenshot

3. **Document date shown on the portal**. The portal now displays the document date the user entered when uploading the document to PropertyIQ, rather than the actual created date. If there's no date entered (PIQ generated documents) then the created date will show.

   See detailed screenshot

4. **Lots page – amount due.** The amount due now allows for two levies for a single lot being due on the same day. For example, where there is both a standard and a special levy due on the same day. This takes part paid levies into conseration. For example, an owner has two lots in a building:

   Lot 1 has three levies due on 1.12.29

   - Standard Levy for $500 which has been fully paid
   - Standard Levy for $200 which has been fully paid
   - Special levy for $500 (nothing paid)
   - Total owing for that lot will be $500

   Lot 2 has three levies due on 1.12.2019

   - Standard levy for $500. Lot owner has paid $200 and there is $300 owing
   - Special levy for $100 (nothing paid)
   - Total owing for that lot will be $300

5. **Committee member invitation email refinement**. Where a committee member has more than one email address on their committee card, the email address used is the first email recorded on their card. This is now in line with the behaviour of a lot owner meeting invitation email
6. **Changes to invitation emails for new portal users.** Portal invitations have been altered to include a warning they they expire in 24 hours unless acted upon. The strata administrators invitation includes instructions for contacting PropertyIQ support

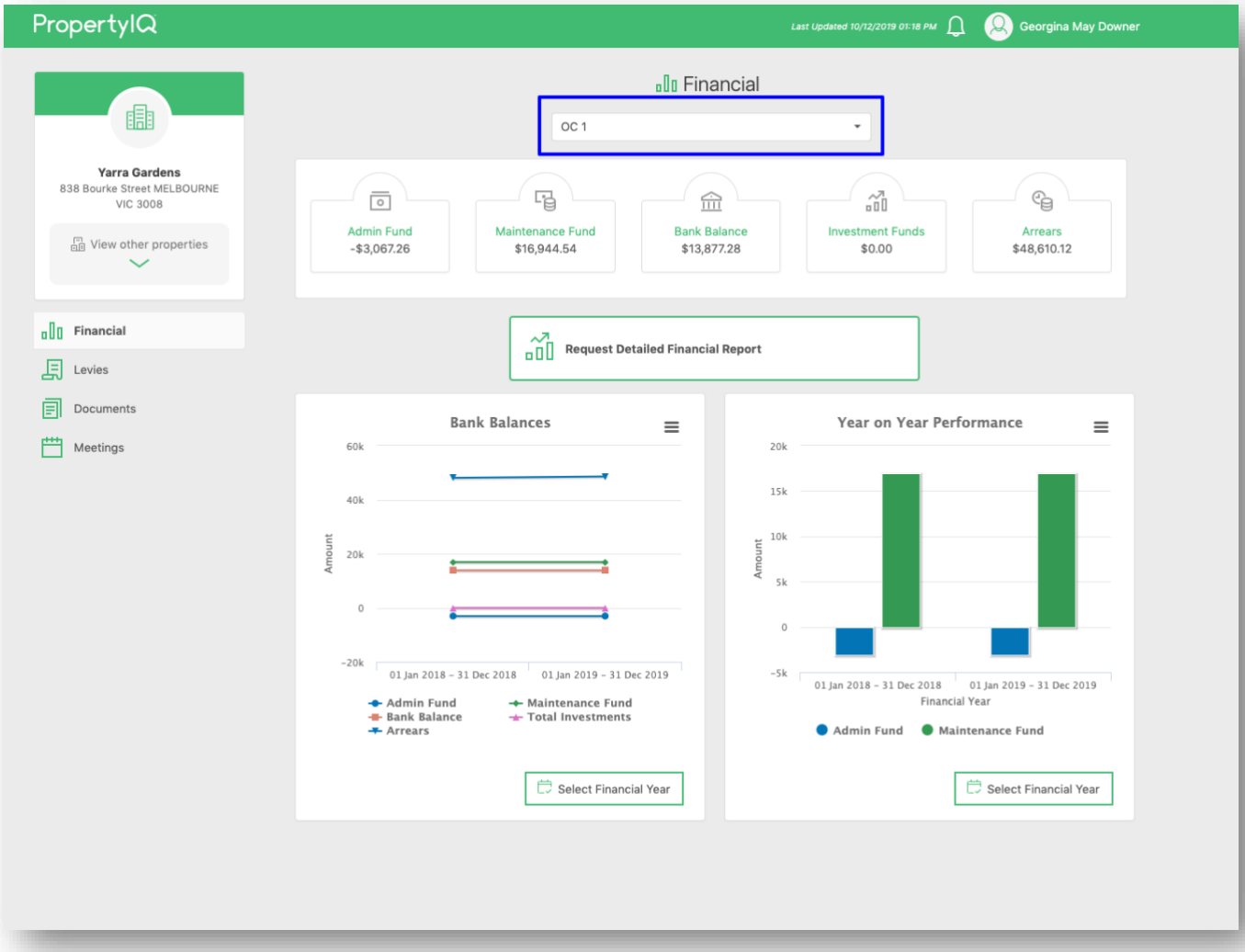
See detailed screenshots.

DETAILED SCREENSHOTS

ITEM 1 -VICTORIAN MULTI-SCHEDULE BUILDINGS – SCHEDULE FILTER ON FINANCIALS PAGE

The financials page now has a filter at the top of the so users can filter their view and select reports for any schedules they belong to. The default is the first active schedule they belong to (the order is determined by the order set on the building card>schedules) They won't see schedules they don't belong to. The new filter applies to:

- Fund balances
- Bank balances
- Year on year performance



ITEM 2 - VICTORIAN MULTI-SCHEDULE BUILDINGS – NEW FILTER ON PROPERTY DETAILS PAGE

The property details page now has a filter at the top so users can filter their view to any schedule they belong to. view by schedule. The default is the first active schedule they belong to (the order is determined by the order set on the

building card>schedules. When the lot owner filters by schedule they will see differences in the following fields (if applicable to that schedule)

- ABN
- GST Status
- List of committee members

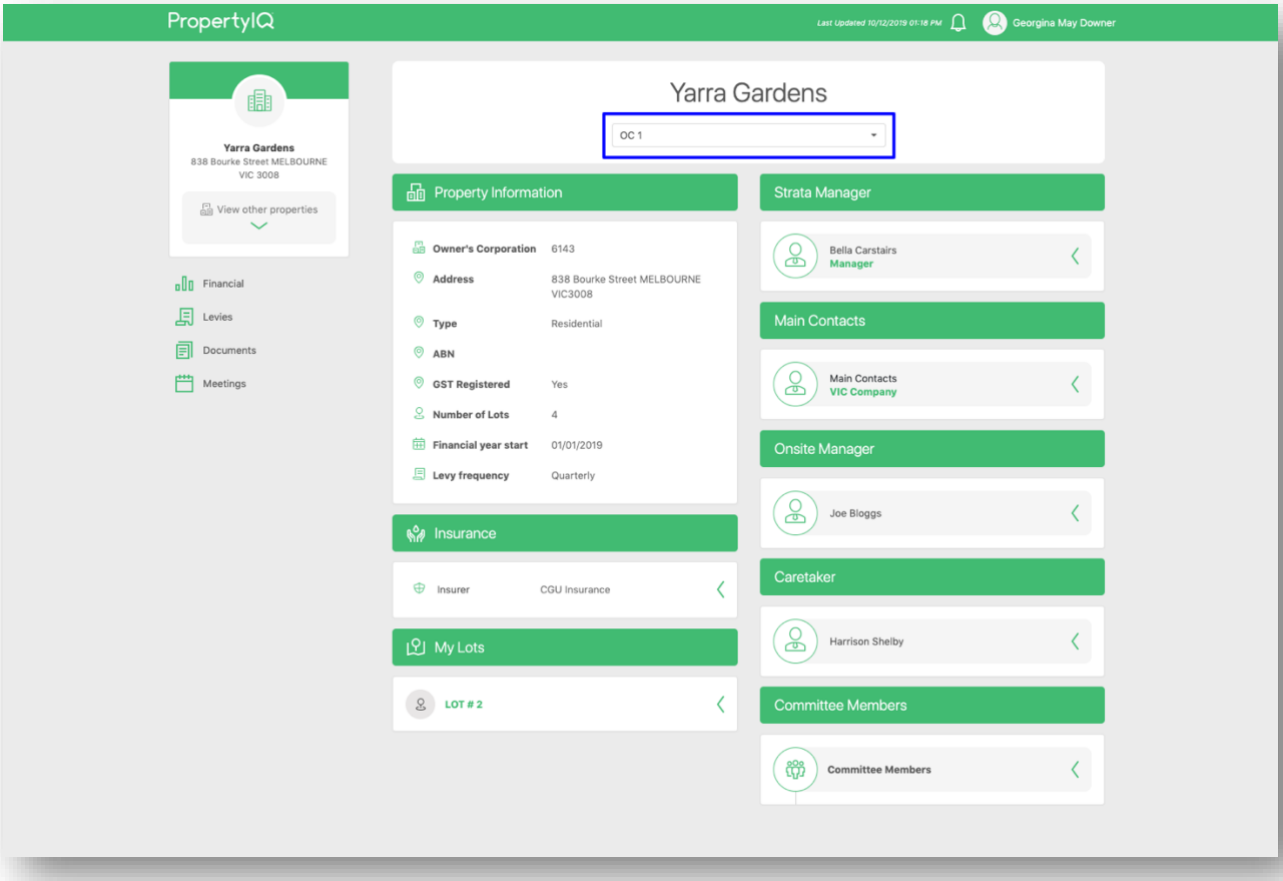
If a committee member belongs to two or more active schedules, they will see the filter at the top to filter their view by schedule. The default is the first active schedule they belong to (the order is determined by the order set on the building card>schedules. When the lot owner filters by schedule they will see differences in the following fields (if applicable to that schedule

- ABN
- GST Status
- List of committee members

If a committee member has not been selected to belong to any specific schedules they will see an option to filter their view by schedule, the filter list contains all the active schedules for that building but defaults to OC 1 (the order is determined by the order set on the building card>schedules. When the lot owner filters by schedule, they will see differences in the following fields

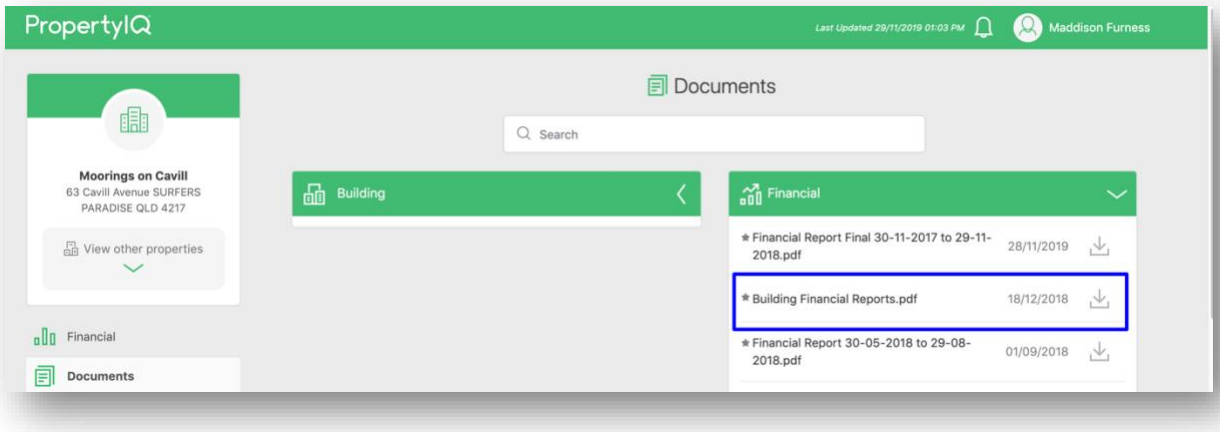
- ABN
- GST
- List of committee members – Note if OC1 is being viewed, the the committee members for OC 1 and those that haven't been allocated to a schedule will show.

Note: If a schedule has no information entered in the ABN or GST fields, then the information for the building is shown



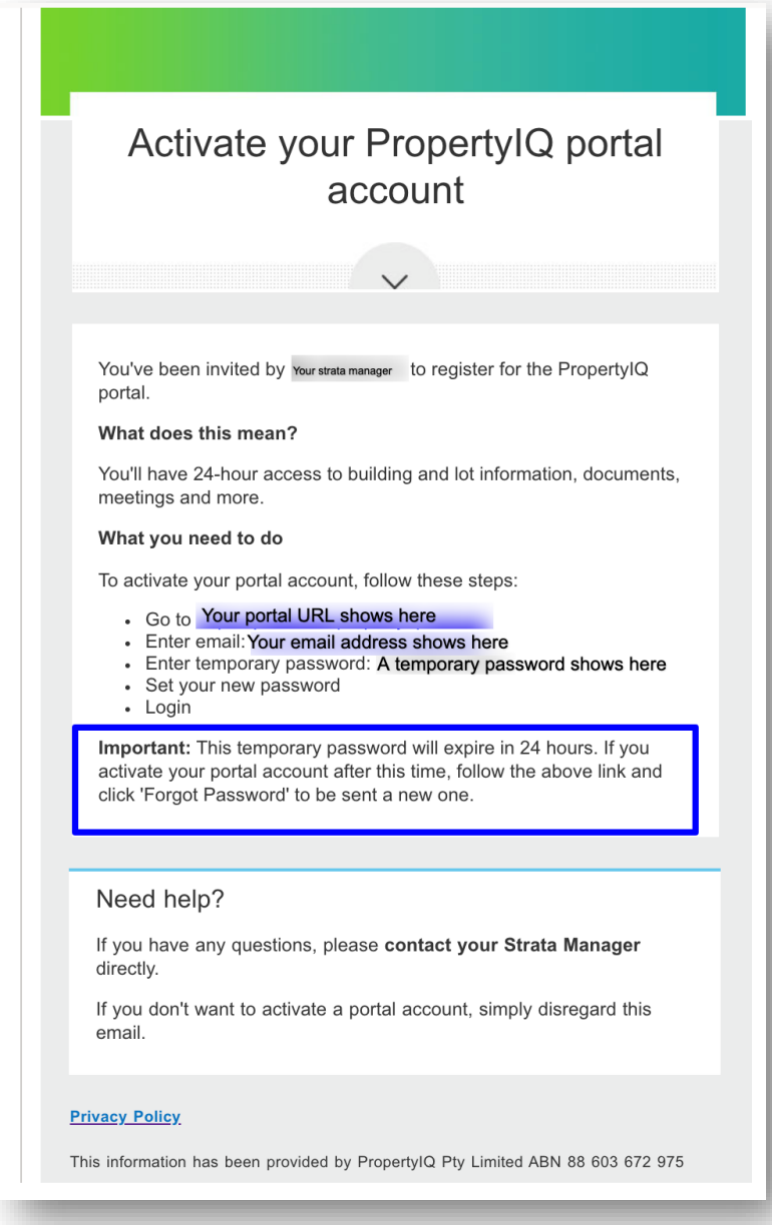
ITEM 3 - CHANGE TO DOCUMENT DATE SHOWN IN PORTAL.

The portal now displays the document date the user entered when uploading the document to PropertyIQ if there is one, rather than the actual created date. If there's no date entered (PIQ generated documents) then the created date will show.



ITEM 6 – CHANGES TO PORTAL INVITATIONS.

A new lot owner invitation looks like this.



Activate your PropertyIQ portal account

You've been invited by Your strata manager to register for the PropertyIQ portal.

What does this mean?

You'll have 24-hour access to building and lot information, documents, meetings and more.

What you need to do

To activate your portal account, follow these steps:

- Go to Your portal URL shows here
- Enter email: Your email address shows here
- Enter temporary password: A temporary password shows here
- Set your new password
- Login

Important: This temporary password will expire in 24 hours. If you activate your portal account after this time, follow the above link and click 'Forgot Password' to be sent a new one.

Need help?

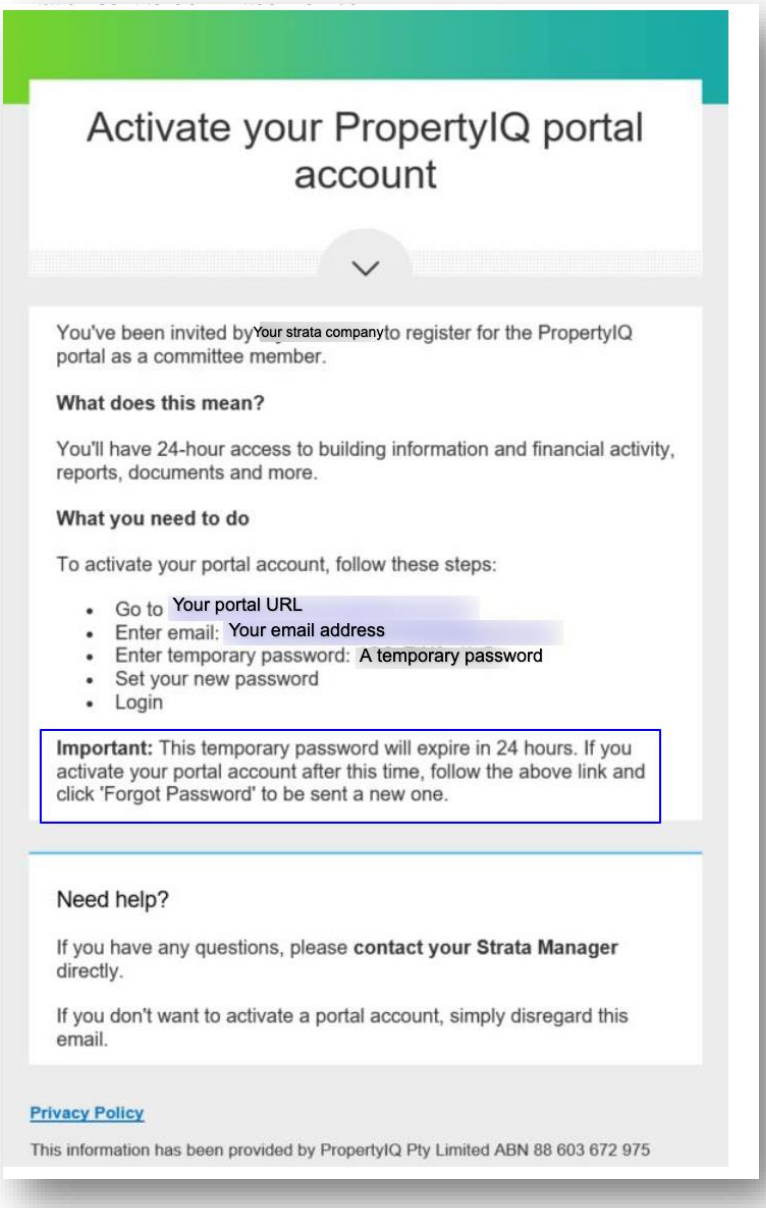
If you have any questions, please **contact your Strata Manager** directly.

If you don't want to activate a portal account, simply disregard this email.

Privacy Policy

This information has been provided by PropertyIQ Pty Limited ABN 88 603 672 975

A committee member invitation looks like this



Activate your PropertyIQ portal account

You've been invited by Your strata company to register for the PropertyIQ portal as a committee member.

What does this mean?

You'll have 24-hour access to building information and financial activity, reports, documents and more.

What you need to do

To activate your portal account, follow these steps:

- Go to Your portal URL
- Enter email: Your email address
- Enter temporary password: A temporary password
- Set your new password
- Login

Important: This temporary password will expire in 24 hours. If you activate your portal account after this time, follow the above link and click 'Forgot Password' to be sent a new one.

Need help?

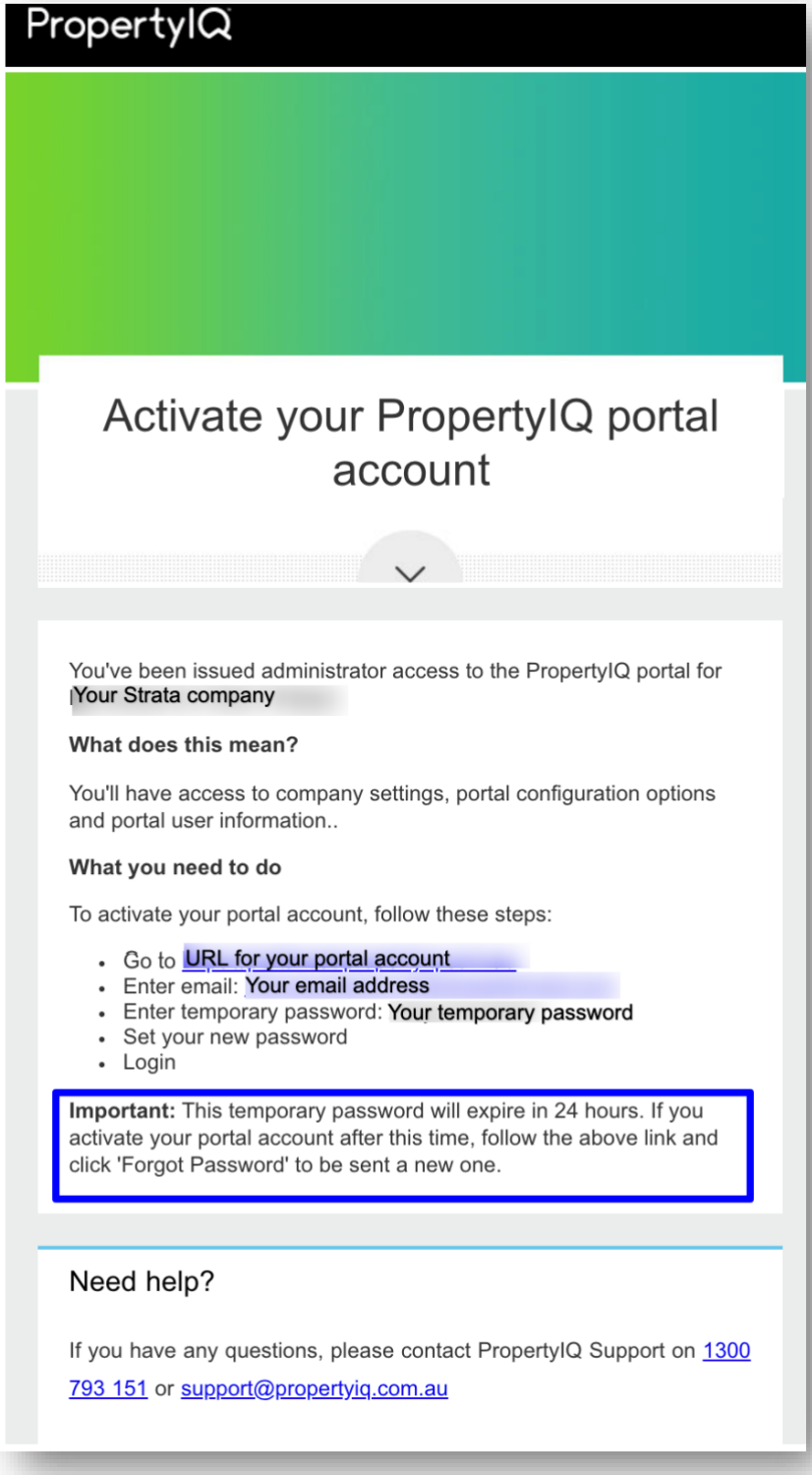
If you have any questions, please **contact your Strata Manager** directly.

If you don't want to activate a portal account, simply disregard this email.

Privacy Policy

This information has been provided by PropertyIQ Pty Limited ABN 88 603 672 975

A strata administrator invitation looks like this.



PropertyIQ

Activate your PropertyIQ portal account

You've been issued administrator access to the PropertyIQ portal for Your Strata company

What does this mean?

You'll have access to company settings, portal configuration options and portal user information..

What you need to do

To activate your portal account, follow these steps:

- Go to URL for your portal account
- Enter email: Your email address
- Enter temporary password: Your temporary password
- Set your new password
- Login

Important: This temporary password will expire in 24 hours. If you activate your portal account after this time, follow the above link and click 'Forgot Password' to be sent a new one.

Need help?

If you have any questions, please contact PropertyIQ Support on 1300 793 151 or support@propertyiq.com.au