PropertyIQ™

Release Notes Version 154.0-154.2

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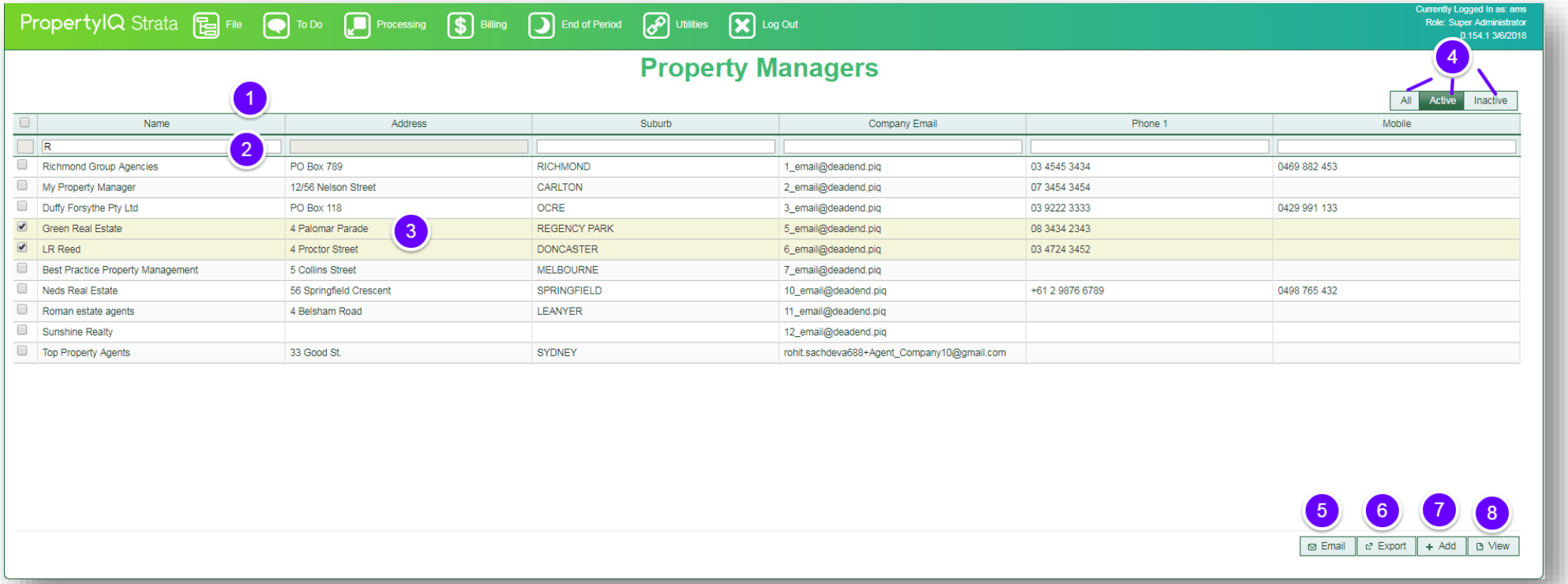
SUMMARY	
New Features	1. Buildings>Financial Report>Funds Management report. If you process a credit note to reverse a supplier transaction, it will no longer show under the "Money due to be paid" section of the Funds Management Report. 2. File>Documents>Document Entry. If you are adding documents from the main documents screen (rather than from the building card) once you have completed the first document upload, the screen will now clear and nothing will pre-populate on the screen. 3. File>Property Managers. Enhancements to property manager functions. From the Property Manager's screen, you can now: • Export single or bulk property manager details • Bulk or single email property managers that have an email address From the property manager card, you can now view all the lots managed by that property manager. 4. Improvements to processes when altering the data on a grid (for example, the Lots Owners Screen.) If you change the filter on a grid, it will clear any previously selected rows. I.e. if you go to File>Lots Owners and select a lot and then add in a filter, the previously selected row will be cleared. This is to fix an issue where previously it wasn't clearing the selected row, and the row that remained selected was no longer the row that you actually chose to edit. 5. Emailing – you can now forward an email that was sent from PropertyIQ. Emails can be forwarded from the Utilities>Emailing Tab, the email tab on the building card, or the email tab on a supplier card. When you open an email item, there is a new button - "Forward". 6. Settings>Application Settings. Changes to Budget Settings. The settings that affect budgets have now been grouped together and there is also new setting that allows you to choose a different layout for the owner summary and contribution summary budget reports. 7. Meetings – Motions – New Resolution type – "Ordinary Resolution without Proxies" which does not allow the use of proxies. The voting sheet report now shows these motions as an "Ordinary Resolution without Proxies" 8. Meetings – Quorum calculation. You can now choose to include unfinancial members for the purpose of calculating a quorum. This is to allow for QLD and Vic legislation, where the financial status of lot owners should not affect the quorum calculation. Also, if the building is located in Queensland, you will see the message "Please review calculations if there is a single representative for multiple lots". This is because in Queensland, currently a lot owner with multiple lots should only be counted once for the purpose of achieving a quorum. 9. Changes to voting calculations. Some changes have been made to the way PIQ calculates votes to cater for differences in legislation between states. You can see the new calculation rules from the Meeting Card>Voting Tab by clicking on "Click here to see the rules for automatically calculating the motion resolution" 10. Enhancements to email templates. You can now create and edit standard email templates from the Templates menu>Standard Email Templates. Different templates can now be created for different Folios. 11. Automatic supplier compliance expiry emails - You can now enable up to three automated emails to be sent to remind suppliers that their compliance is about to expire. There are new settings in the Settings>Supplier Compliance Tab to allow you to enable sending up to three automated reminders prior to, and after the expiry date, of the supplier's compliance. There are three new standard email templates for the three different reminders in the new Templates>Standard Email Templates function.

	• Supplier Compliance First Reminder • Supplier Compliance Second Reminder • Supplier Compliance Expired 12. Utilities>Audit Trail. Changes have been made to make loading this screen much faster. 13. Buildings>Budgets. An issue where recent changes caused budget reports not to show the Building name, has been fixed. 14. Financial reports – Balance Sheets. For all balance sheet reports, whether split schedule or consolidated, if an account code has a zero balance it will not show. The only exception to this is the Cash at Bank account which will always show, even if it has a zero balance. 15. An issue that was caused by the recent changes to allow sending merge letters to" The Occupant", has now been fixed. When using "Recipient" merge fields and owner occupier has been unticked, the owner name was showing on the letter in some cases. 16. For multi-schedule buildings that are registered for GST – a change has been made so that the ABN of the schedule shows on GST reports, rather than the ABN for the building. 17. For Victorian buildings. When striking levies, the word "Fee" now replaces the word "levy" in the details. 18. Activity Log>Import function. You will now see more details if there are any errors in your import. You will be able to see which rows contain invalid data and choose whether you want to proceed or go back and amend your data. 19. Due Notices> Missing Levies. You now have an option to print missing levies.

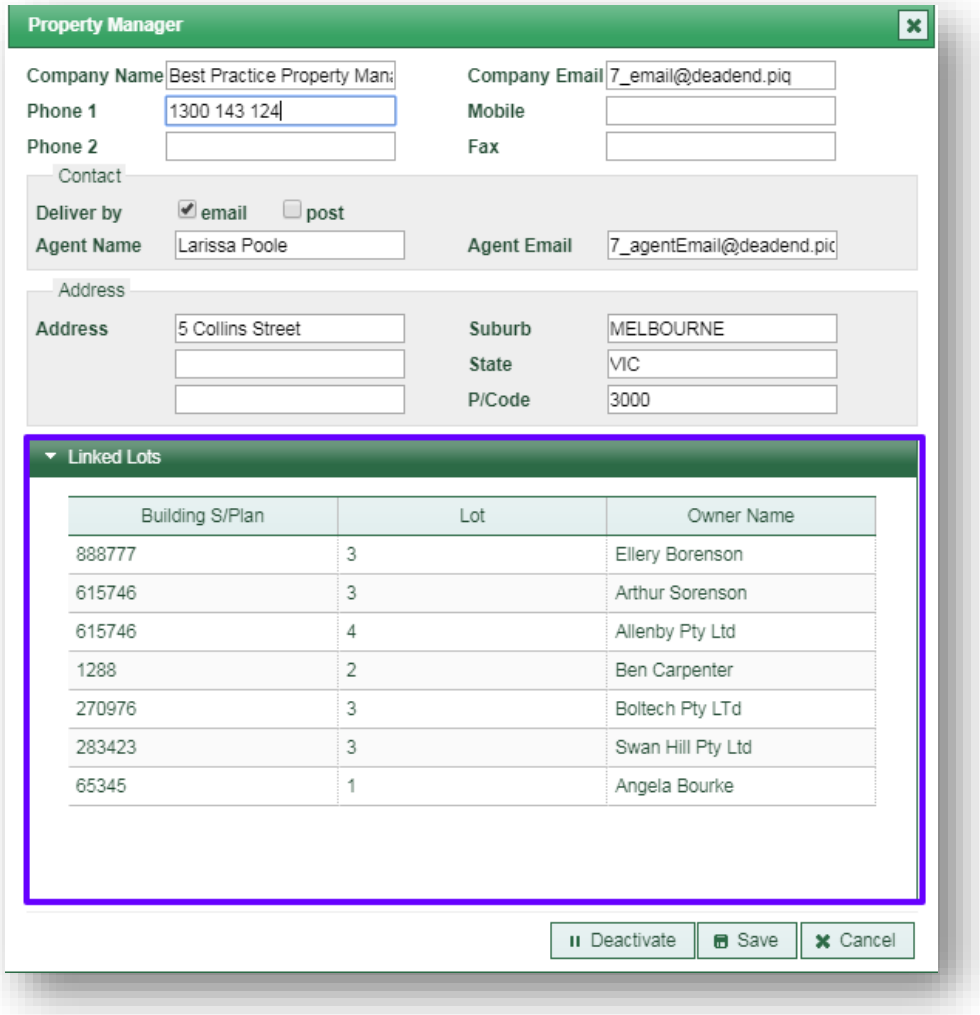
DETAILED SCREENSHOTS

ITEM 3 – IMPROVEMENTS TO THE PROPERTY MANAGERS SCREEN

1. You can sort order on the screen by clicking on any column heading
2. Type some key letters in any of the empty boxes on the top line to refine your search
3. Click on single or multiple property managers to highlight them. If you highlight a single property manager on the screen you can click again to open the property manager card.
4. The view defaults to active property managers but you can click on the All or Inactive Tabs
5. Click Email to open the email screen. This takes you to your default email account, (eg. your Outlook or gmail account) where you can write an email
6. Click Export to export the details of the highlighted property managers as a .csv file
7. Click Add to add a new property manager
8. Click view to open a property managers card that is highlighted on the screen



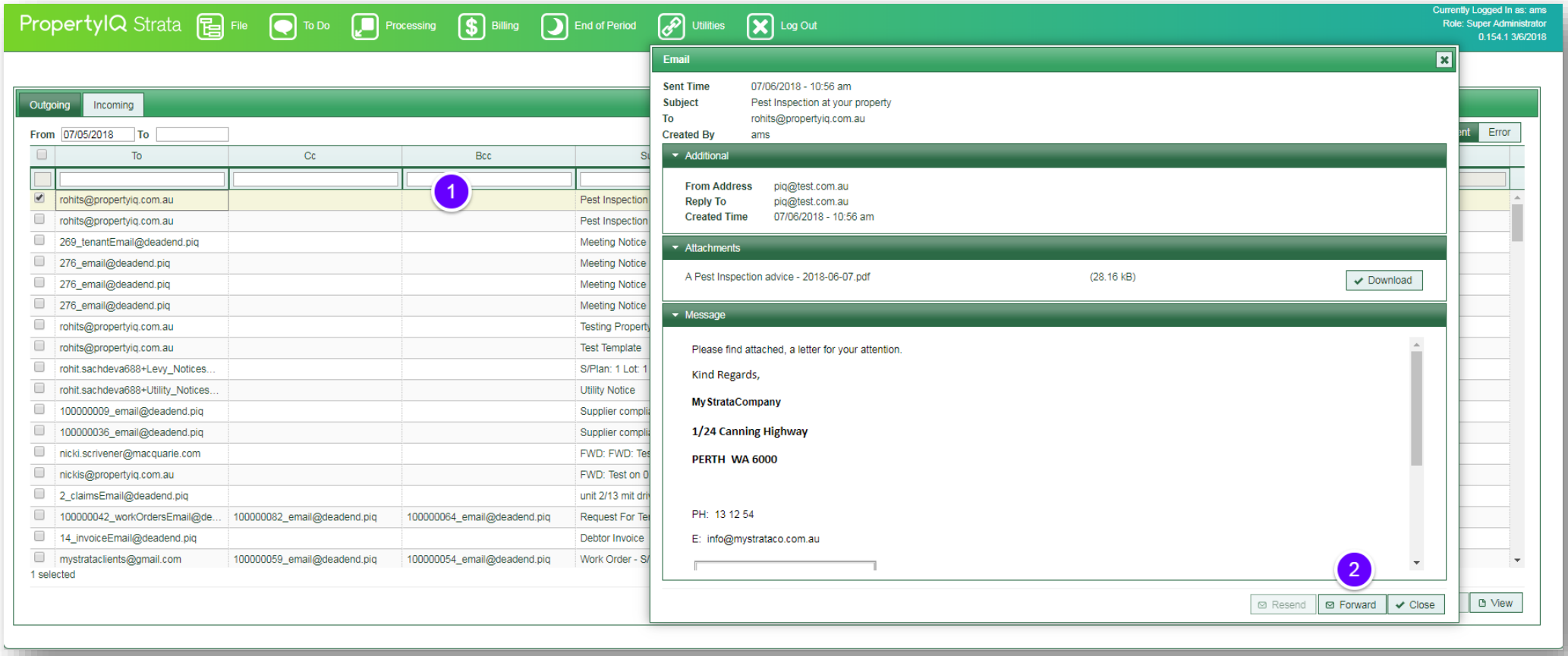
The Property Manager's card now shows all the lot owners linked to that property manager



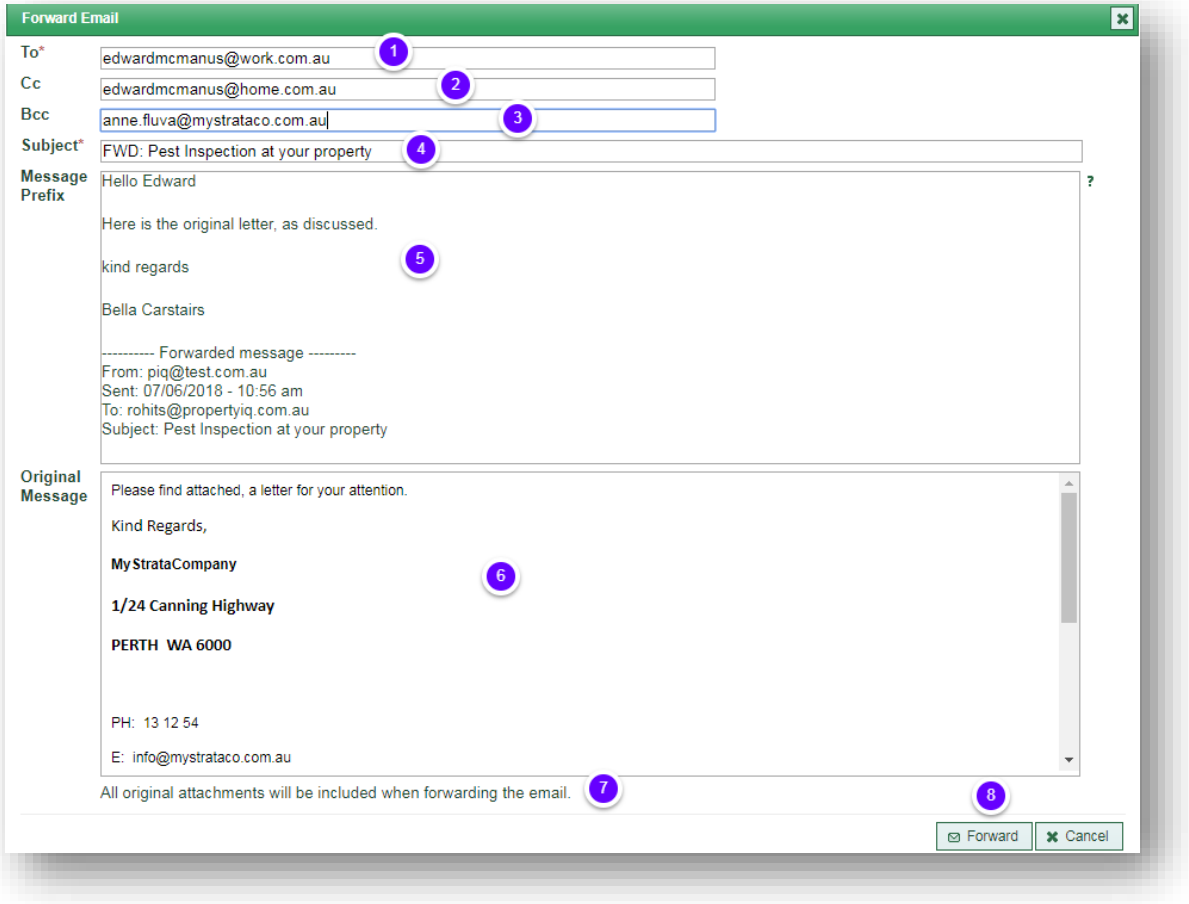
ITEM 5 – YOU CAN NOW FORWARD AN EMAIL THAT WAS GENERATED BY PROPERTYIQ

1. Click on the email you want to forward
2. Click Forward.

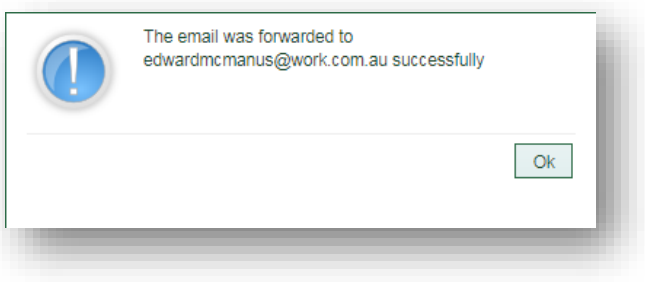
This screenshot shows the email in the outgoing emails log, but you can also forward outgoing emails on the email tab for a lot owner or supplier.



1. Type the email address you want to forward to here
2. Type an email address you want to cc here (optional)
3. Type an email address you want bcc here (optional)
4. Type a subject here
5. Type the body of the forwarded email here
6. The original email shows here
7. Click forward when you are ready to forward the email



Once you click Forward, a pop-up will confirm that the email has been forwarded successfully

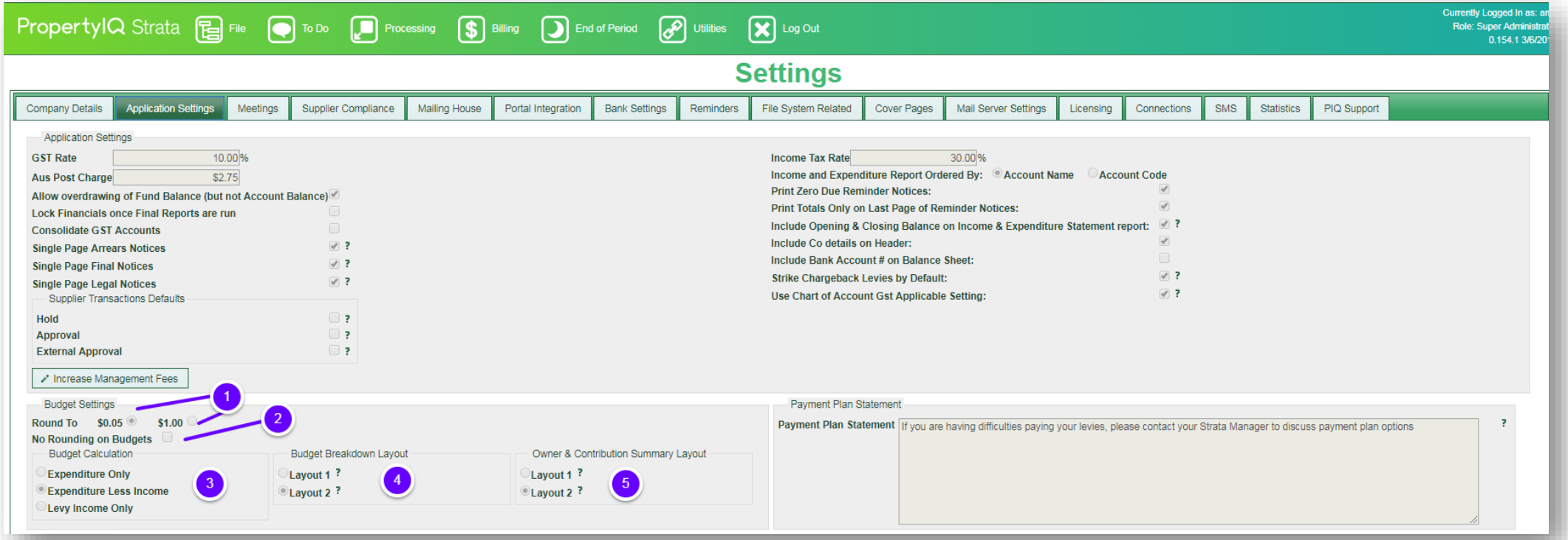


Attachments will be included in the forwarded email, and if the original attachments were comprised of multiple documents merged together, (for example, meeting notices) then the documents in the forwarded email will also be merged.

ITEM 6 - NEW SETTINGS AREA IN APPLICATION SETTINGS FOR BUDGET RELATED SETTINGS

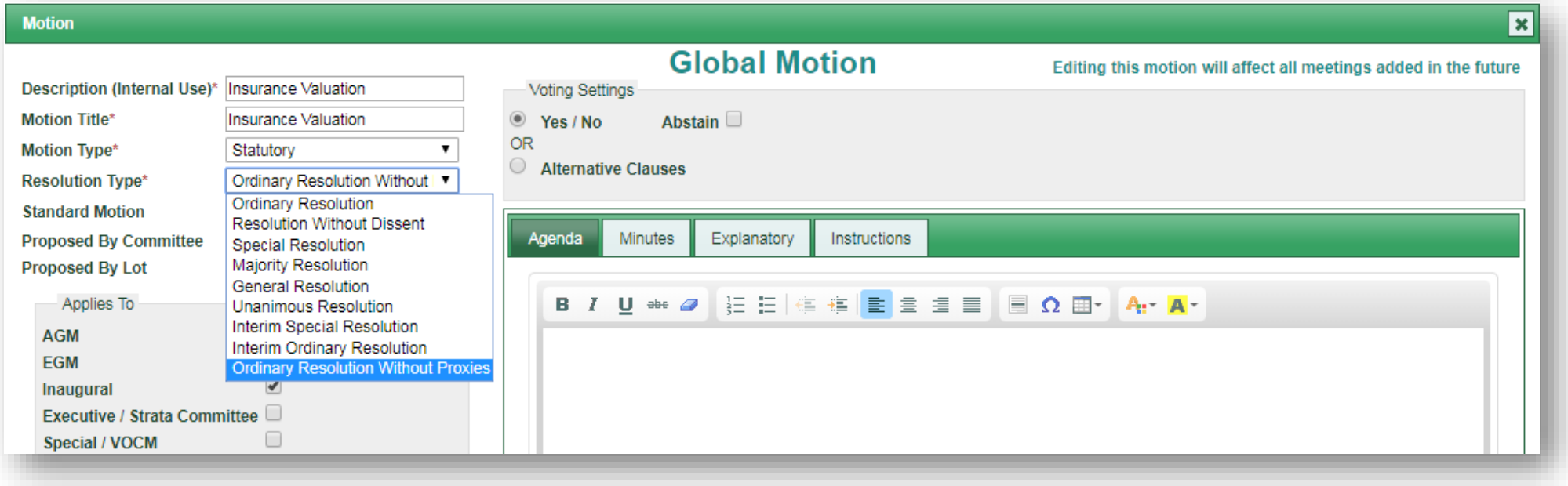
The existing budget settings have now been moved to their own area and there is a new setting to choose the layout of the owner and contribution summary pages.

1. Choose whether you want to round your budget to the nearest 0.05c or the nearest $1.00
2. Click to disallow any rounding on budgets
3. Click to in one of the circles to select the way you want your budget to calculate
    i. Expenditure only – the budget will be calculated based only on the expenses you enter (you can still enter income items – they just won't be taken into account when calculating the budget)
    ii. Expenditure less income – the budget will be calculated based on any expenses you enter less any income you enter.
    iii. Levy income only. The budget calculation is based only on the amount you enter as income using the default levy income chart of accounts code. (You can still enter expense items – they just won't be taken into account when calculating the budget)
4. There are two layout options for printing budgets. You can hover your mouse over the question mark to see full details about each layout
    i. Layout 1 prints in Landscape style
    ii. Layout 2 prints in Portrait style
5. There is a now a **new** setting that allows you to choose the layout of the owner and contribution summary pages. You can hover your mouse over the question mark to see full details about each layout.
    i. Layout 1 shows a line for each lot
    ii. Layout 2 allows you to group lots with the same UOE together to reduce the overall size of the report.

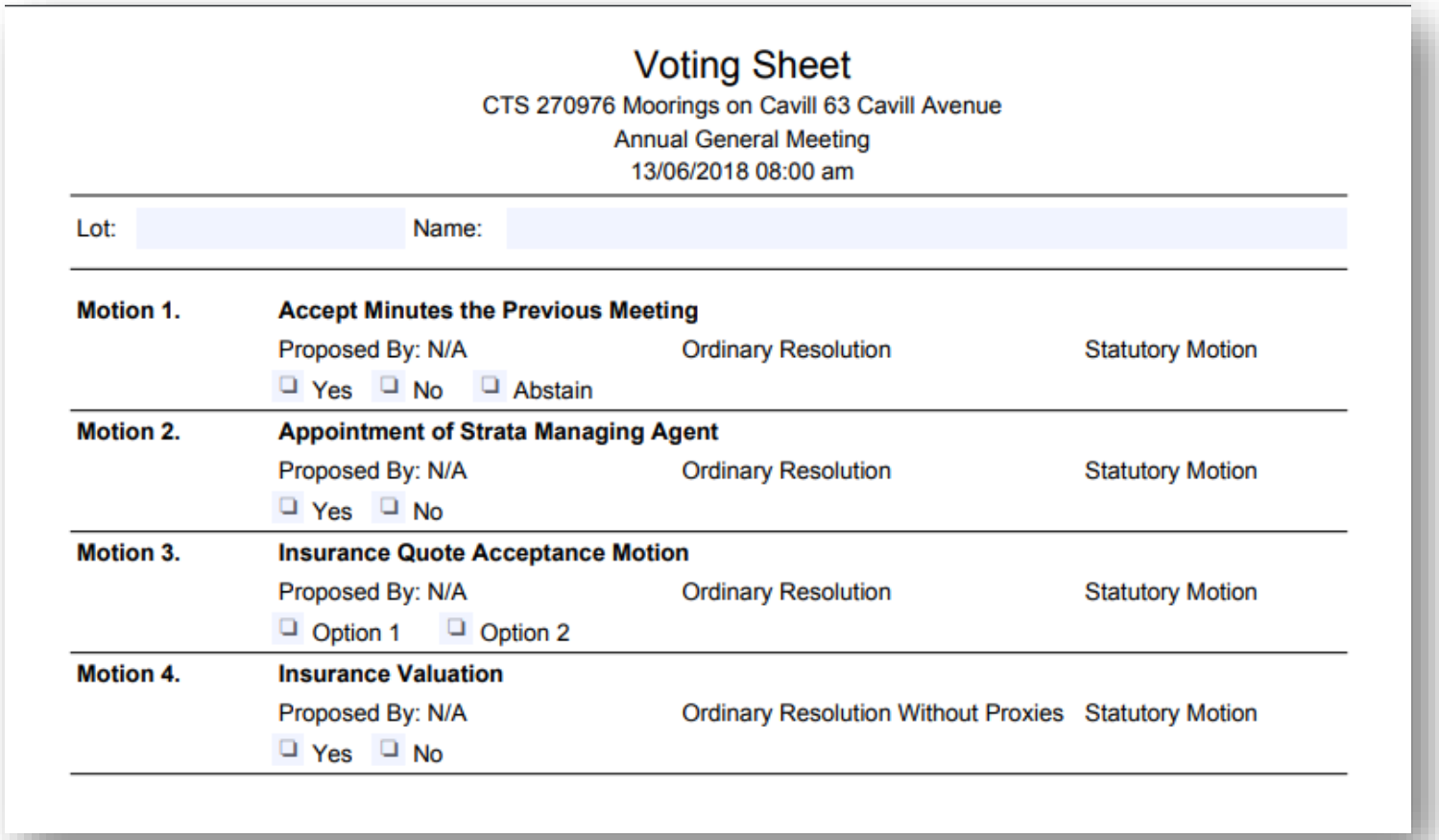

PropertyIQ Strata
File
To Do
Processing
Billing
End of Period
Utilities
Log Out
Settings
Company Details
Application Settings
Meetings
Supplier Compliance
Mailing House
Portal Integration
Bank Settings
Reminders
File System Related
Cover Pages
Mail Server Settings
Licensing
Connections
SMS
Statistics
PIQ Support
Application Settings
GST Rate 10.00%
Aus Post Charge $2.75
Allow overdrawing of Fund Balance (but not Account Balance)
Lock Financials once Final Reports are run
Consolidate GST Accounts
Single Page Arrears Notices
Single Page Final Notices
Single Page Legal Notices
Supplier Transactions Defaults
Hold
Approval
External Approval
Increase Management Fees
Income Tax Rate 30.00%
Income and Expenditure Report Ordered By: Account Name Account Code
Print Zero Due Reminder Notices:
Print Totals Only on Last Page of Reminder Notices:
Include Opening & Closing Balance on Income & Expenditure Statement report:
Include Co details on Header:
Include Bank Account # on Balance Sheet:
Strike Chargeback Levies by Default:
Use Chart of Account Gst Applicable Setting:
Budget Settings
Round To $0.05 $1.00
No Rounding on Budgets
Budget Calculation
Expenditure Only
Expenditure Less Income
Levy Income Only
Budget Breakdown Layout
Layout 1
Layout 2
Owner & Contribution Summary Layout
Layout 1
Layout 2
Payment Plan Statement
Payment Plan Statement
If you are having difficulties paying your levies, please contact your Strata Manager to discuss payment plan options
1
2
3
4
5

ITEM 7 - NEW RESOLUTION TYPE FOR MOTIONS – ORDINARY RESOLUTION WITHOUT PROXIES

Motions now have a new resolution type option – “Ordinary Resolution without Proxies”



Ordinary Resolutions without Proxies show on the voting sheet



Voting Sheet

CTS 270976 Moorings on Cavill 63 Cavill Avenue
Annual General Meeting
13/06/2018 08:00 am

Lot: Name:

Motion 1. **Accept Minutes the Previous Meeting**
Proposed By: N/A Ordinary Resolution Statutory Motion
❑ Yes ❑ No ❑ Abstain

Motion 2. **Appointment of Strata Managing Agent**
Proposed By: N/A Ordinary Resolution Statutory Motion
❑ Yes ❑ No

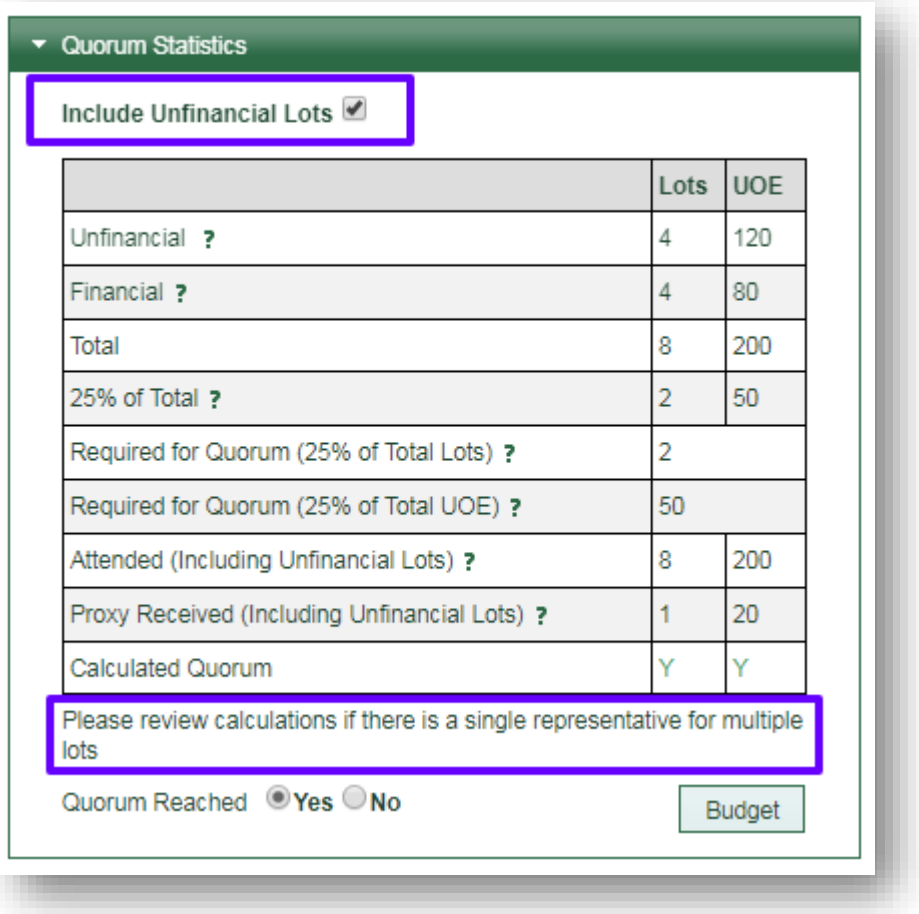
Motion 3. **Insurance Quote Acceptance Motion**
Proposed By: N/A Ordinary Resolution Statutory Motion
❑ Option 1 ❑ Option 2

Motion 4. **Insurance Valuation**
Proposed By: N/A Ordinary Resolution Without Proxies Statutory Motion
❑ Yes ❑ No

ITEM 8 - MEETINGS – CHANGES TO QUORUM CALCULATION

You can now tick to include unfinancial lots in the quorum calculation

If the Building is located in Queensland, you will also see the additional message “Please review calculations if there is a single representative for multiple lots.”

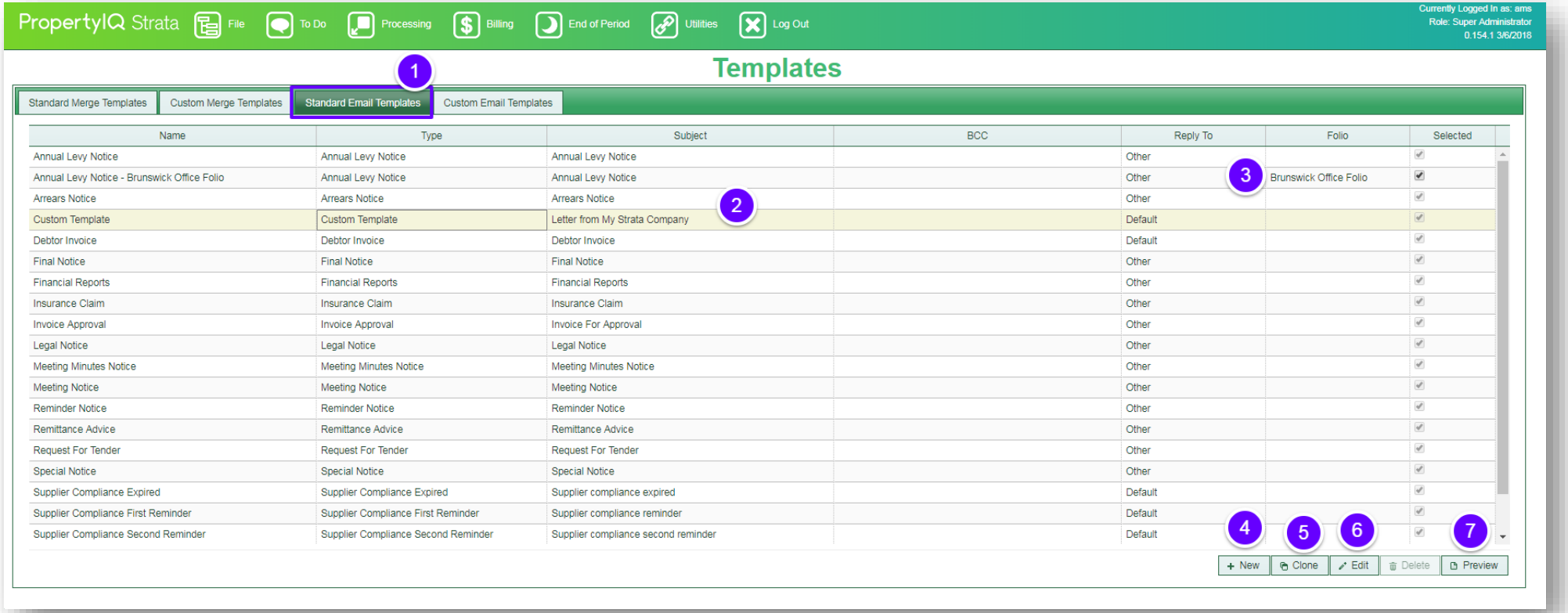


ITEM 10 – YOU CAN NOW CREATE AND EDIT STANDARD EMAIL TEMPLATES FROM THE TEMPLATES MENU

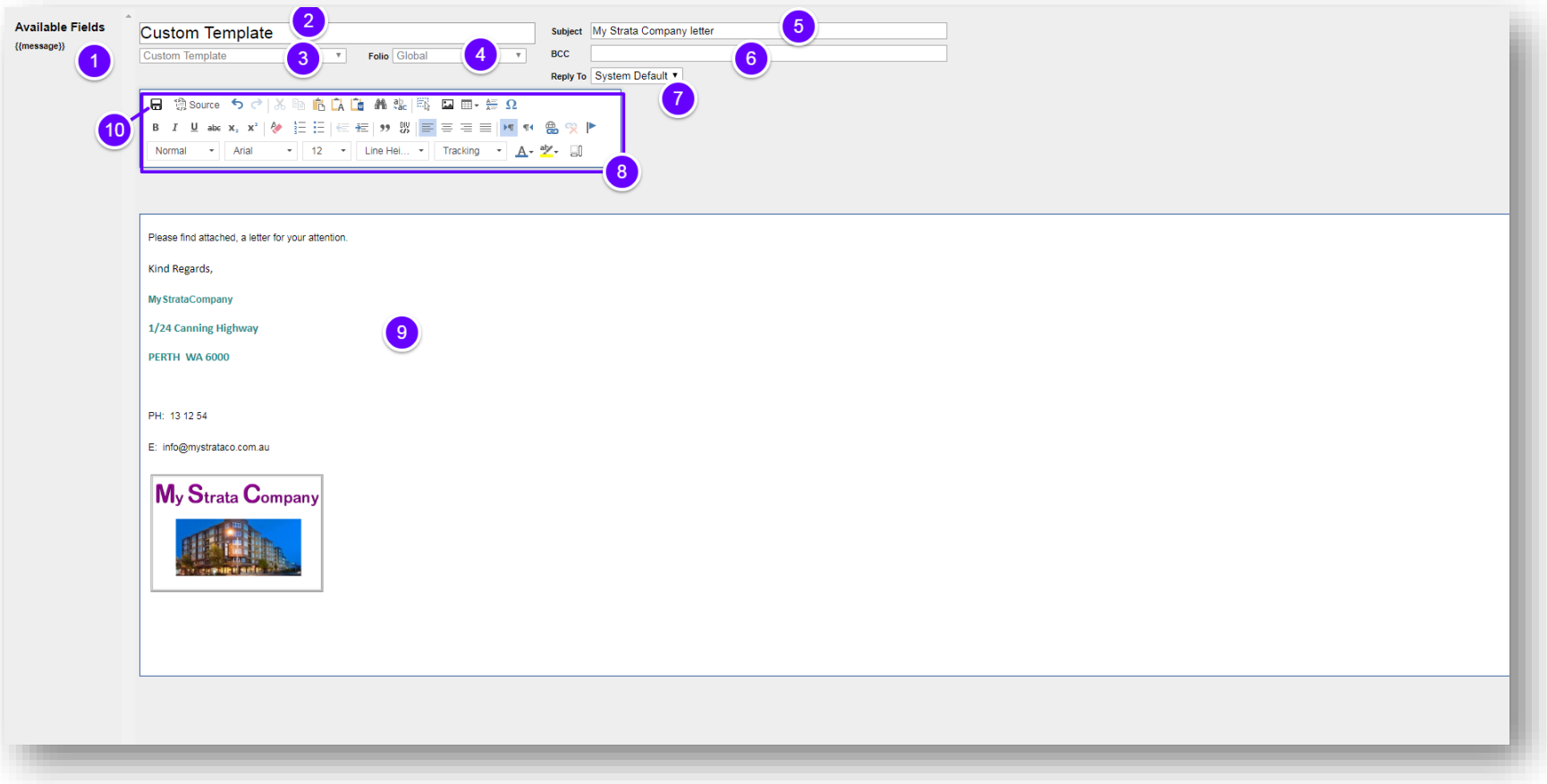
The templates function, Standard Email Templates Tab, now contains all the Standard Email Templates that can be edited.

The existing standard email templates you already have that used to be viewed under Settings>Standard Email Templates, are now visible here.

1. From the Templates Menu, click on the Standard Email Templates tab
2. Click on an email template to highlight it on the screen
3. You can set up email templates specific to a folio
4. Click on the New button to create a new standard email template
5. Click on the Clone button to clone an existing template
6. Click on Edit to edit an existing template
7. Click Preview to preview a document you have highlighted on the screen

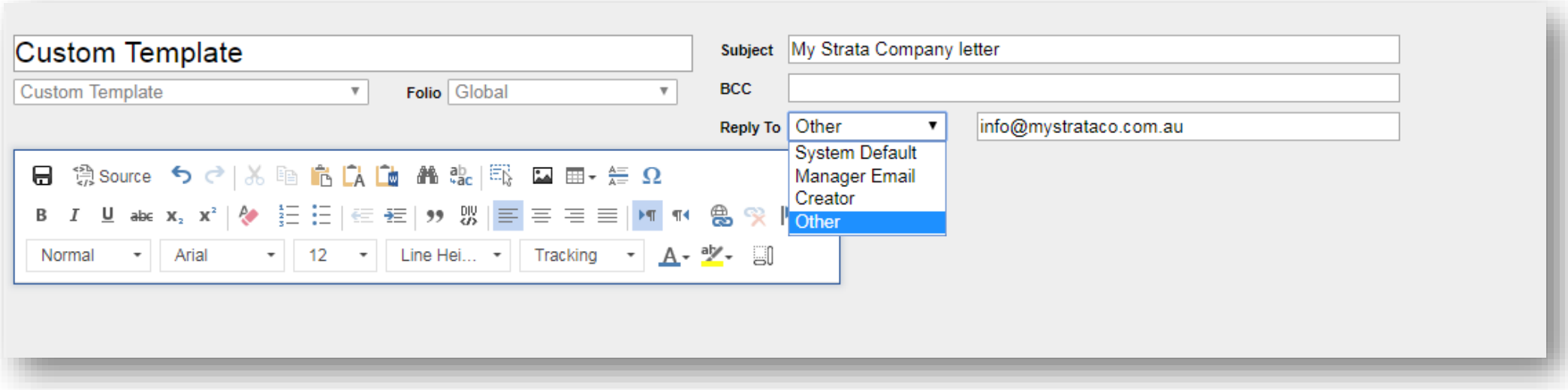

PropertyIQ Strata
File
To Do
Processing
Billing
End of Period
Utilities
Log Out
Currently Logged In as: ams
Role: Super Administrator
0.154.1 3/6/2018
Templates
1
Standard Merge Templates
Custom Merge Templates
Standard Email Templates
Custom Email Templates
Name
Type
Subject
BCC
Reply To
Folio
Selected
Annual Levy Notice
Annual Levy Notice
Annual Levy Notice
Other
Annual Levy Notice - Brunswick Office Folio
Annual Levy Notice
Annual Levy Notice
Other
3
Brunswick Office Folio
Arrears Notice
Arrears Notice
Arrears Notice
Other
2
Custom Template
Custom Template
Letter from My Strata Company
Default
Debtor Invoice
Debtor Invoice
Debtor Invoice
Default
Final Notice
Final Notice
Final Notice
Other
Financial Reports
Financial Reports
Financial Reports
Other
Insurance Claim
Insurance Claim
Insurance Claim
Other
Invoice Approval
Invoice Approval
Invoice For Approval
Other
Legal Notice
Legal Notice
Legal Notice
Other
Meeting Minutes Notice
Meeting Minutes Notice
Meeting Minutes Notice
Other
Meeting Notice
Meeting Notice
Meeting Notice
Other
Reminder Notice
Reminder Notice
Reminder Notice
Other
Remittance Advice
Remittance Advice
Remittance Advice
Other
Request For Tender
Request For Tender
Request For Tender
Other
Special Notice
Special Notice
Special Notice
Other
Supplier Compliance Expired
Supplier Compliance Expired
Supplier compliance expired
Default
Supplier Compliance First Reminder
Supplier Compliance First Reminder
Supplier compliance reminder
Default
Supplier Compliance Second Reminder
Supplier Compliance Second Reminder
Supplier compliance second reminder
Default
4
5
6
7
New
Clone
Edit
Delete
Preview

1. The example here is using a Custom Merge template which does not use this merge field so for this type of template you can ignore it. The {{message}} merge field is used for some other template types.
2. The name of the Template appears here.
3. Choose the type of Template here. The template shown is the one that will be generated when you send a custom merge template to email recipients
4. Choose the folio this template will be attached to from the dropdown list. The template shown is the global templete
5. The example here is using a Custom Merge template so the subject is ignored when you conduct the actual merge, as you type a specific subject whenever you do the actual merge.
6. You can enter an email here if you want as specific email address to be automatically bcc'ed whenever you generate an email of this type
7. Select the the email address you want recipients to be able to reply to here. See the screenshot below for the available options
8. Use the editing functions to edit the body of the email template
9. Type the body of the email template
10. Click on the Save icon to save the email template


Available Fields
{{message}}
Custom Template
Custom Template
Folio
Global
Subject
My Strata Company letter
BCC
Reply To
System Default
Source
Normal
Arial
12
Line Hei...
Tracking
Please find attached, a letter for your attention.
Kind Regards,
My StrataCompany
1/24 Canning Highway
PERTH WA 6000
PH: 13 12 54
E: info@mystrataco.com.au
My Strata Company
1
2
3
4
5
6
7
8
9
10

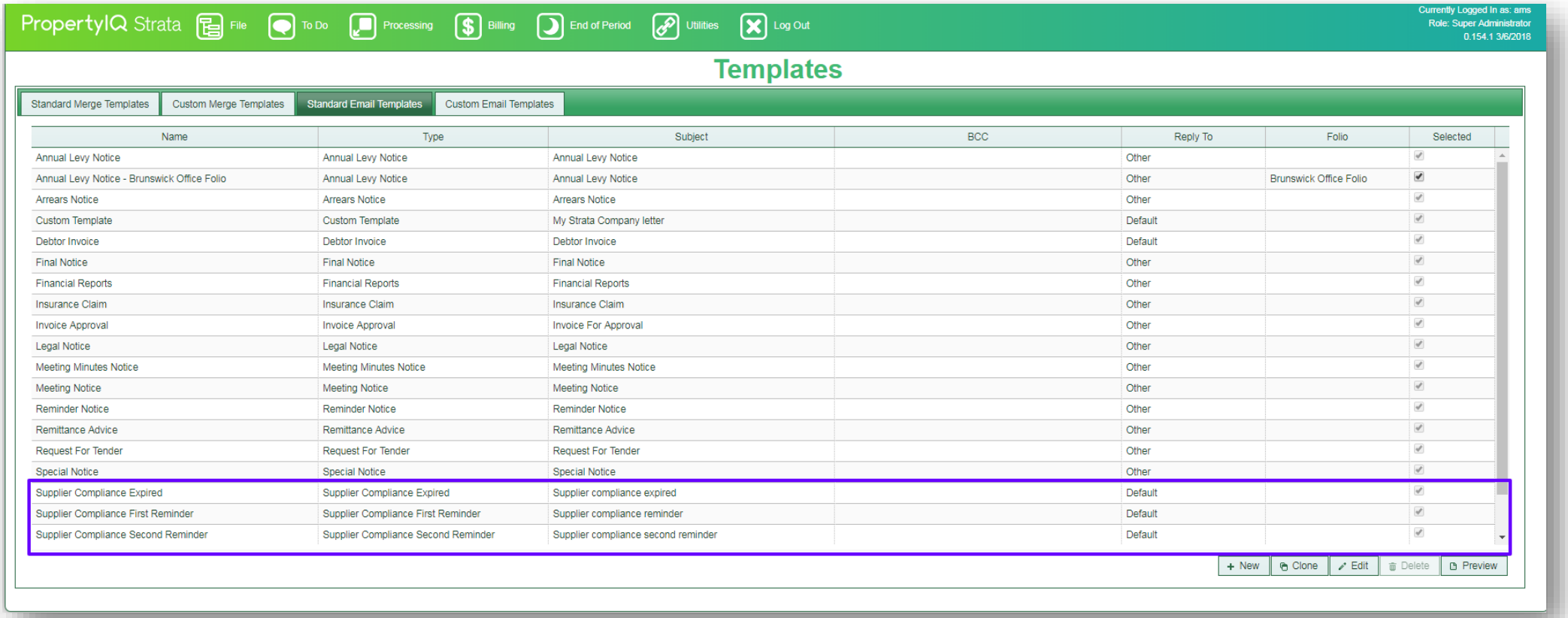
The options for the email address to reply to are:

- System default – the email address that is entered in your Settings>company details
- The user that is set as the strata manager for the building the email relates to
- The creator of the email – (the user that is sending the email)
- Other – if you choose Other, you need to type the email address you want to use as shown here

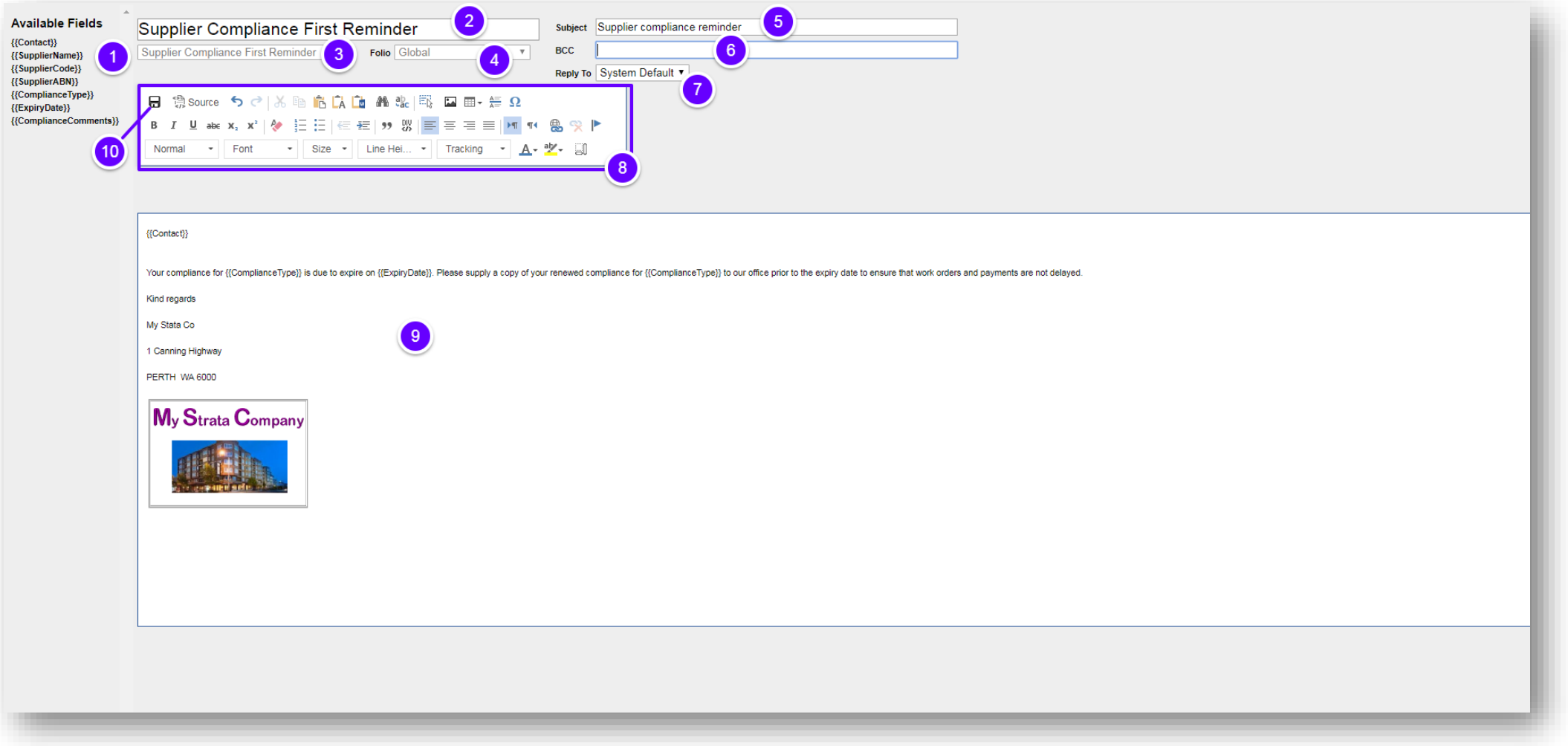


ITEM 11 - NEW OPTION TO SEND AUTOMATED REMINDERS TO SUPPLIERS TO TELL THEM THEIR COMPLIANCE IS EXPIRING

You can now set up automated emails to send to Suppliers to remind them that their compliance is about to expire or has expired. The first step is to set up the required email templates. From the Standard Email Templates tab.



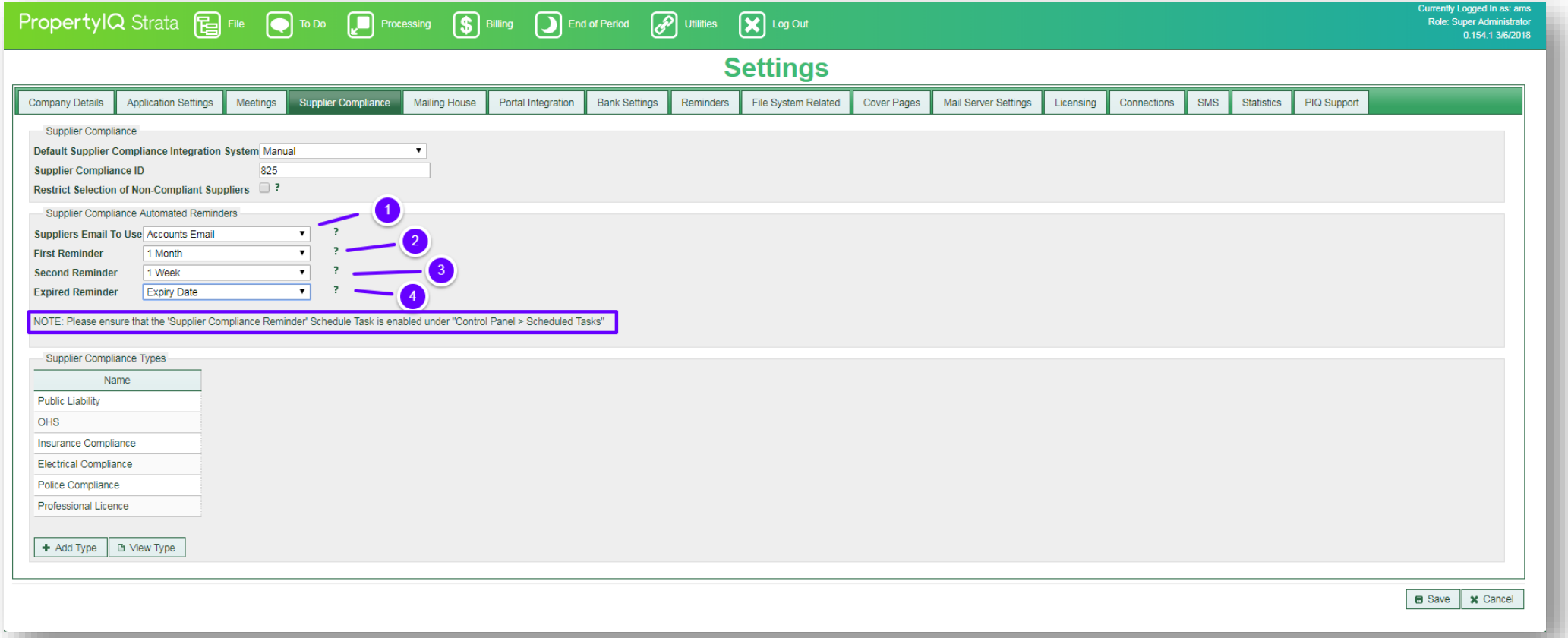
1. The available merge fields show here. To add a merge field, place your cursor where you want the merge field to appear and click on the merge field with your mouse
2. The name of the email template shows here
3. The type of email template shows here
4. You can choose a folio from the dropdown list. The email template shown here is a global template
5. The subject line of the email show here
6. You can enter an email to be automatically bcc'ed when each automated email is sent out if you want to
7. Choose the email you want recipients to be able to reply to here. (see section above about the available options for the reply to address.



The next step is to set up your preferences in the Settings>Supplier Compliance tab.

1. Choose which of the supplier's email addresses you want the reminders to go to. You can choose either accounts email or the work orders email
2. Choose when you want the first reminder to send. This screenshot shows the first reminder email being generated one month before the compliance expiry date
3. Choose when you want the second reminder to send. This screenshot shows the second reminder being generated one week before the compliance expiry date
4. Choose when you want the expired reminder to send. This screenshot shows the expired reminder being generated on the expiry date

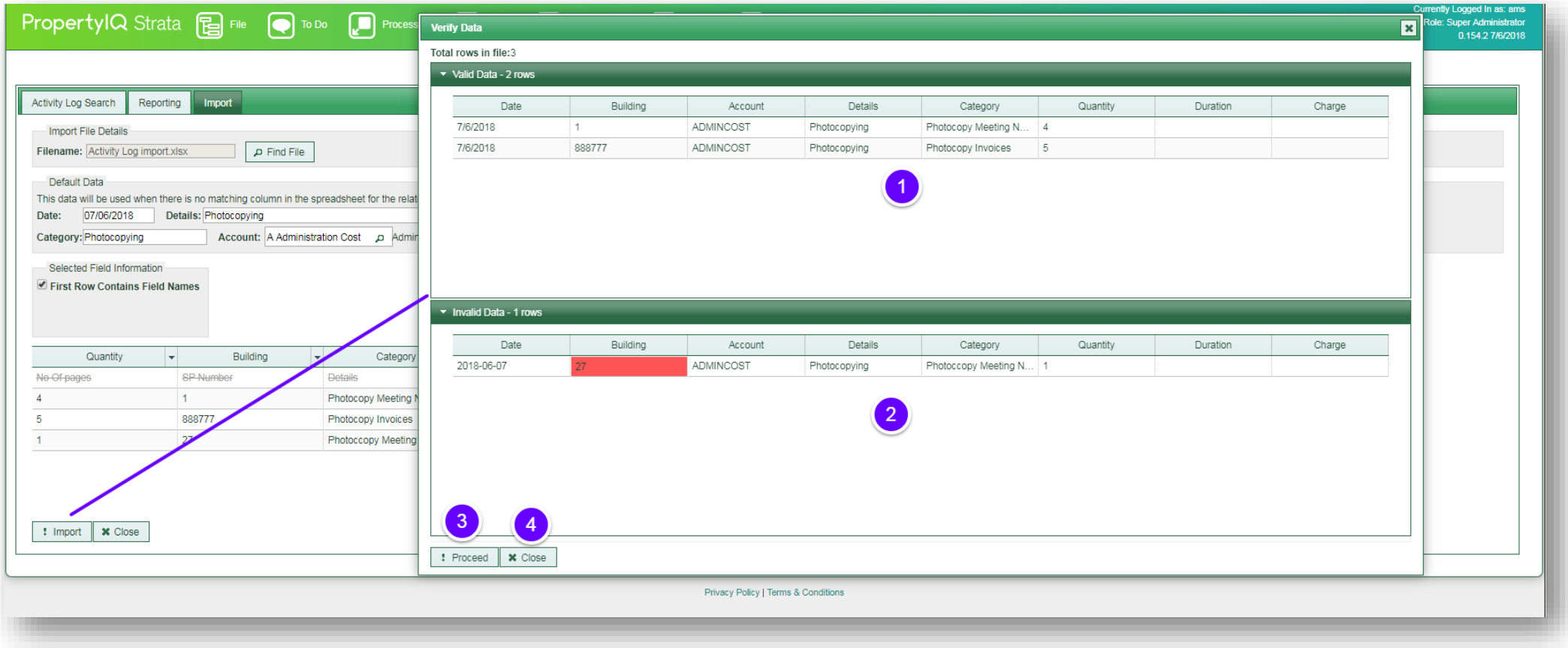
If no time period is selected for a reminder, then the reminder shows as disabled and no reminder will be sent. You can hover your mouse over the question mark beside each reminder to view an explanation.


PropertyIQ Strata
File
To Do
Processing
Billing
End of Period
Utilities
Log Out
Currently Logged In as: ams
Role: Super Administrator
0.154.1 3/6/2018
Settings
Company Details
Application Settings
Meetings
Supplier Compliance
Mailing House
Portal Integration
Bank Settings
Reminders
File System Related
Cover Pages
Mail Server Settings
Licensing
Connections
SMS
Statistics
PIQ Support
Supplier Compliance
Default Supplier Compliance Integration System
Manual
Supplier Compliance ID
825
Restrict Selection of Non-Compliant Suppliers
Supplier Compliance Automated Reminders
Suppliers Email To Use
Accounts Email
First Reminder
1 Month
Second Reminder
1 Week
Expired Reminder
Expiry Date
1
2
3
4
NOTE: Please ensure that the 'Supplier Compliance Reminder' Schedule Task is enabled under "Control Panel > Scheduled Tasks"
Supplier Compliance Types
Name
Public Liability
OHS
Insurance Compliance
Electrical Compliance
Police Compliance
Professional Licence
Add Type
View Type
Save
Cancel

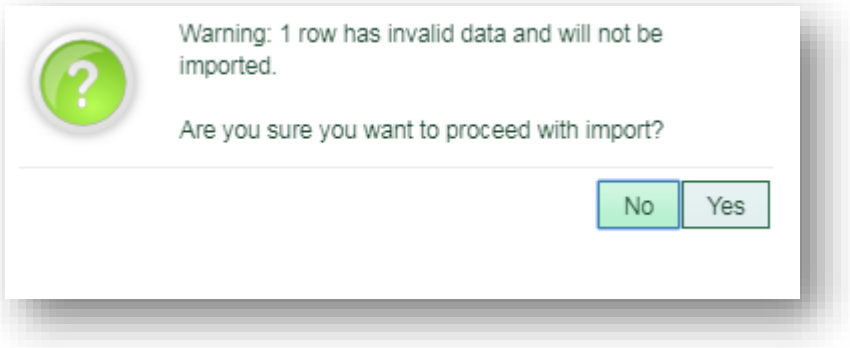
ITEM 18 – IMPORTING ACTIVITY LOGS – MORE DETAILS ABOUT ERRORS IN YOUR DATA

When you import data from a spreadsheet into the activity log, any errors are now shown more clearly.

1. Rows with valid data show in the top section
2. Rows with invalid data show in the bottom section, with the invalid data highlighted. In this screenshot the building does not exist on the database so this row of data can't be imported.
3. Click Proceed if you wish to proceed with the import – any rows with invalid data will not be included
4. Click close if you don't want to proceed. You can then go back and amend your spreadsheet before importing again.



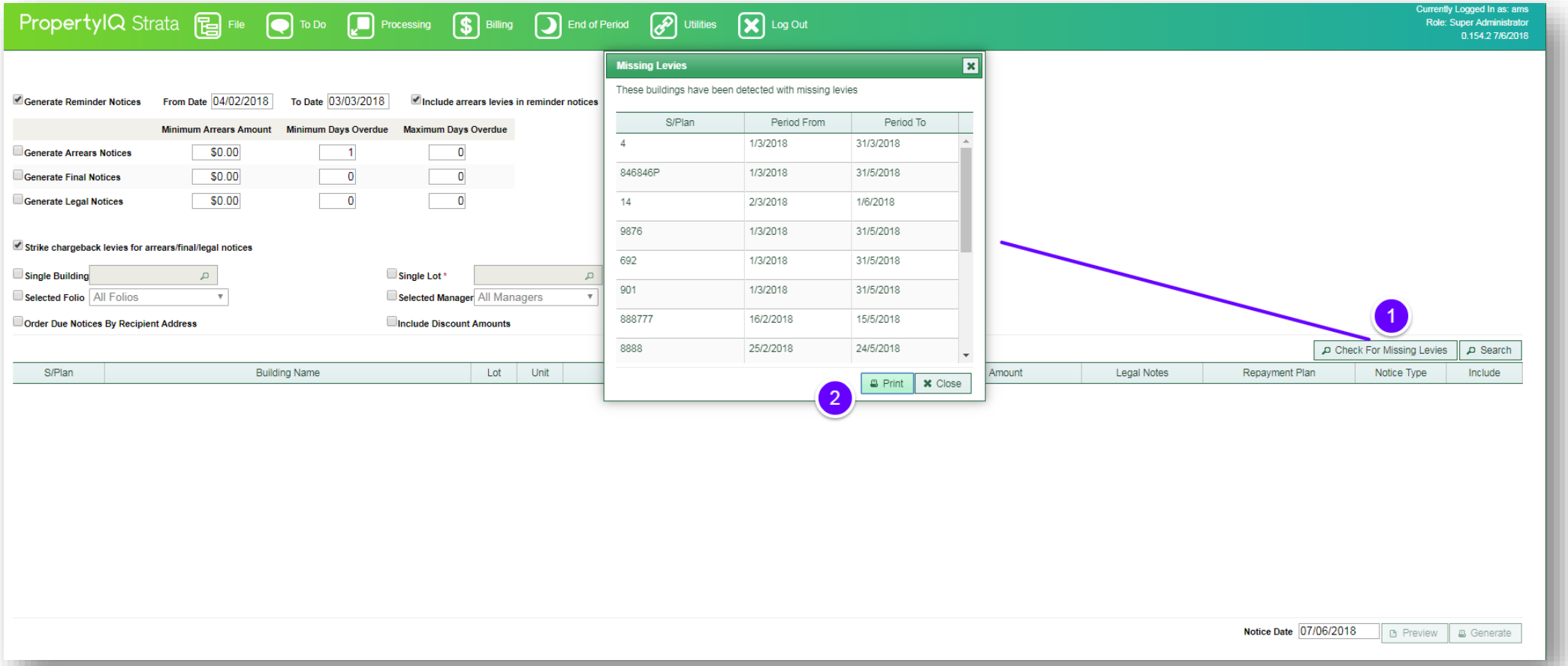
If you click Proceed and there are any rows with invalid data, you will see his pop-up.



ITEM 21 - PRINT MISSING LEVIES REPORT

You can now print any missing levies from the Due Notices Screen>Missing Levies button.

1. Click on “Check for Missing Levies”
2. Click on Print



Missing Levies Report from 04/02/2018 to 03/03/2018

Building	Period From	Period To
4 Penrith Plaza 1 Smith	01/03/2018	31/03/2018
846846P The Prestige 101 Collins Street	01/03/2018	31/05/2018
14 Smith Street Building 1 Smith Street	02/03/2018	01/06/2018
9876 Scott's Building Scott St	01/03/2018	31/05/2018