PropertyIQ™

Release Notes
April 2025

This release includes changes to:

- PropertyIQ
- PropertyIQ Portal

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Improvements for legislation changes (ACT)

1. **Ceiling insulation details –** We've made some improvements to how you record ceiling insulation details that are used in rental certificates for ACT buildings, under *Building card>Info tab>Info Certificates accordion>Details*.

   a. In the existing 'Ceiling Insulation' section

      i. **'Has insulation' checkbox**: When recording Lots that must comply (lots that must have insulation), the checkbox name has been changed from 'Compliant' to 'Has insulation?' to make it clearer around its purpose. You tick this checkbox if you know the lot has insulation.

      ii. **Insulation r-value**: When ticking the 'Has insulation?' checkbox for a lot, you'll see a new field appear called 'R-value' to allow you to record the r-value of the installed insulation (optional field).

      iii. **Display r-value in certificates**: If the r-value is recorded, then it will auto-populate into the lot's certificate using the existing merge field {{Insulation_Min_Standards}} e.g. Yes, R-Value 5.

   b. New 'Ceiling insulation statement' section

      i. **New field to optionally record a statement**: You can now record general information and/or disclose any required statements around insulation in a free text field (optional field, 800 character limit).

      ii. **Display statement in certificates**: Any text entered in the ceiling insulation statement field can be displayed in your certificates using the new merge field {{&Ceiling_Insulation_Statement}}. NOTE: You will need to add this merge field to your templates where applicable.

   See below for a detailed screenshot.

2. **Issue rental certificates in bulk** – We've made some changes to the bulk info certificate generation screen for an ACT building to allow you to generate rental certificates in bulk for one or more lots, under *Building card>Info Certificates buttо*n. From this screen, you can also view more relevant information like the last owner change date and rental certificate expiry date for each lot.

   a. New option for Sales or Rental certificate type: You can now generate either a Sales certificate or a Rental certificate in bulk from this screen. When selecting Rental type, you'll also see an option to select if it's an updated certificate.

   b. View more lot information for Rental certificates: When selecting Rental type, you'll see more information for each Lot listed in the grid.

      i. **'Last owner change'** will auto-populate with the date of the last owner change of the lot, or will be blank if no change of owner has been processed in PIQ for the lot (read-only field).

      ii. **'Certificate expiry'** will auto-populate with a date 5 years from today's date (editable field), or if it's an updated certificate it'll populate with the expiry date of the last rental certificate issued for that lot (read-only field).

iii. **'Requested by'** will auto-populate with the owners name (editable field).

See below for a detailed screenshot and instructions.

Helpful Tip

When you need to issue an updated rental certificate to relevant lots when information changes, you can use the bulk certificate generation screen to quickly see which lots require one and issue it in bulk to all applicable lots.

- From the *Building card> Info Certificates button>* select *Rental* type> select *Update>* manage the attachments> view which lots have a Certificate Expiry date in the next 5 years> exclude the lots that have had a recent change of owner> then generate the certificate for only the applicable lots.
- The certificate documents (inc attachments) are available in the sidebar for downloading and are automatically saved to Lot documents for each lot.

Info certificates (ACT & NSW)

3. **New attachments accordion for bulk certificates** – You can now manage attachments when generating info certificates in bulk for ACT or NSW buildings under *Building card>Info Certificates button*.

   From the new *Attachments* accordion, you can view and manage the building's default certificate attachments (setup under *Building card>Info tab>Info Certificates accordion>Attachments tab*). You can also add adhoc attachments as required. These documents will then be included as attachments for all selected lots when generating the certificate.

   See below for a detailed screenshot.

Audit trail report

4. **View building and lot changes in audit trail report** – You can now view and report on changes to building and lot details via the Audit Trail Report under *Reporting>Management>Audit Trail*.

   You can select a specific date range, user, action (create, update, delete), building (single or all) and lots (single or all). You can then view this information using the export or PDF report.

   Note:

   - The building and lot numbers will appear in the 'Updated Record' column of the export and report.
   - Only existing details captured in the global audit trail and log of changes is available in the report. As not all field changes are currently captured in the audit trail, there'll be future improvements to include more details not currently recorded.

   See below for detailed screenshots.

General

5. **New layout and log of changes on committee card –** When viewing, adding and editing committee members under *Building card>Info>Committee accordion*, you'll see a new layout and larger screen size. You can also view changes made to the details and settings of committee members under a new 'Log of changes' tab on each committee card. The 'Log of changes' tab is visible to users who have *Audit trail>View* permission. See below for a detailed screenshot.
6. **Templates > Space removed in payment references numbers (DEFT / BPAY)** – When merging DEFT and BPAY payment reference numbers into templates, they will now appear without a space so it's easier for owners/payers to copy and paste into payment portals.
7. **Templates > Improved validation for merge fields when saving templates** – We've improved validation and error handling of merge fields within standard merge, custom merge and email templates.
    - When editing a template that has merge field validation issues, you'll now see an error message when trying to save the template. It'll have the reason for the error and the list of merge fields with an issue. You can then remove and replace the relevant merge field/s to resolve any issues.
    - As part of validation, it'll check if the template contains merge fields which don't match or aren't available in the merge field library for that template, contain invalid characters, and/or contain HTML inside the merge field string. HTML inside a merge field string might occur when formatting (e.g. bold, italics) is only partially applied to the merge field and not all of it.

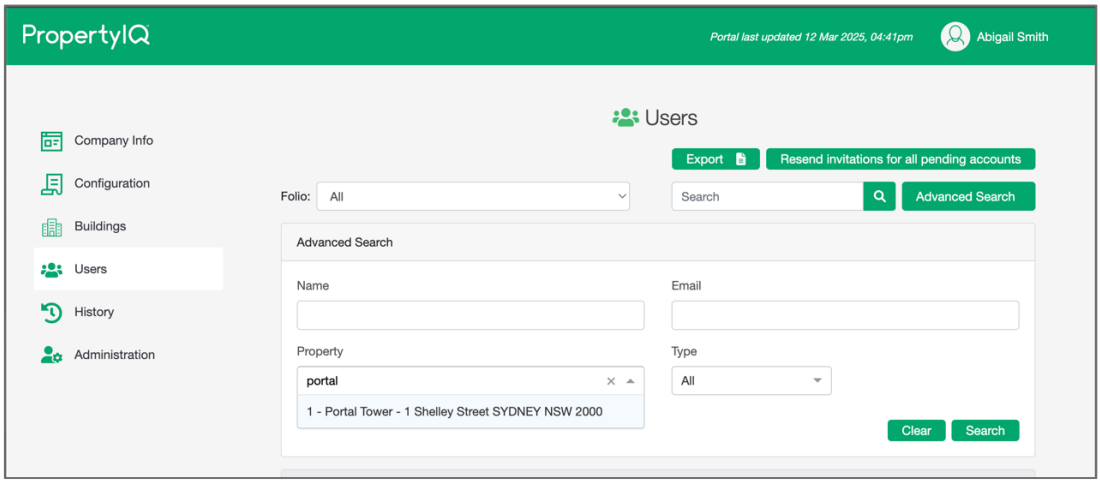
Important note

- When editing templates after this release, you may see errors when saving if there are pre-existing issues with any merge fields. You'll need to correct the errors by removing and/or replacing the relevant merge fields to resolve any issues.

8. **Due notices screen** – To improve the user experience and prevent multiple button clicks on the *Billing>Due/Fee Notices* screen, a progress mask will appear over the screen when clicking the *Generate*, *Preview, View Lot or View Debtor* buttons. The progress mask will disappear once the due notice or debtor statement run is completed, or the lot/debtor card is closed.

Enhanced user search

1. **Building filter for user search** - We've made it easier to find users of a building in the Strata Manager login by adding a building filter to the advanced search functions of the Users page. This will improve the visibility on the uptake of portal in specific buildings.

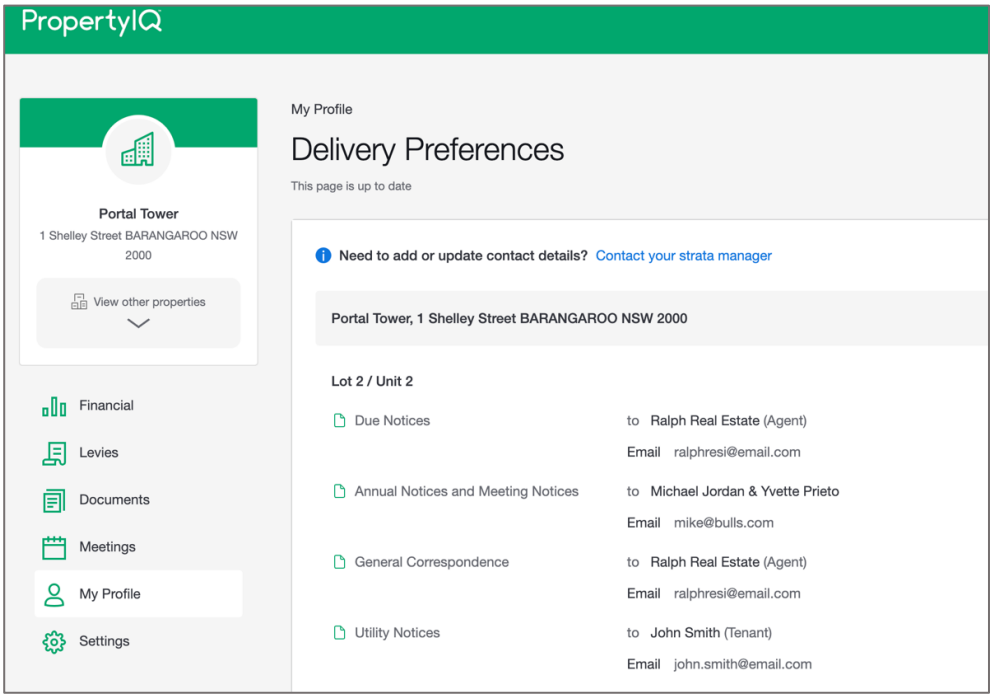


Improved accessibility

2. **Increased screen reader support** - We're committed to making our Portal more accessible. With increased support for screen readers, navigating and using the PropertyIQ Portal is now more inclusive for users with visual impairments.

Clearer delivery information

3. **Recipient name in My Profile's delivery preferences** - Understanding who the recipient of a delivery is has never been clearer. We now provide the name specified for a recipient in the delivery preferences of a lot in PropertyIQ.



Better tab management

4. **Organised browser tab titles** - For those who love working with multiple tabs, we've organized the browser tab titles in the Strata Manager login. This enhancement helps you keep track of your open tabs more easily and improves your overall workflow.

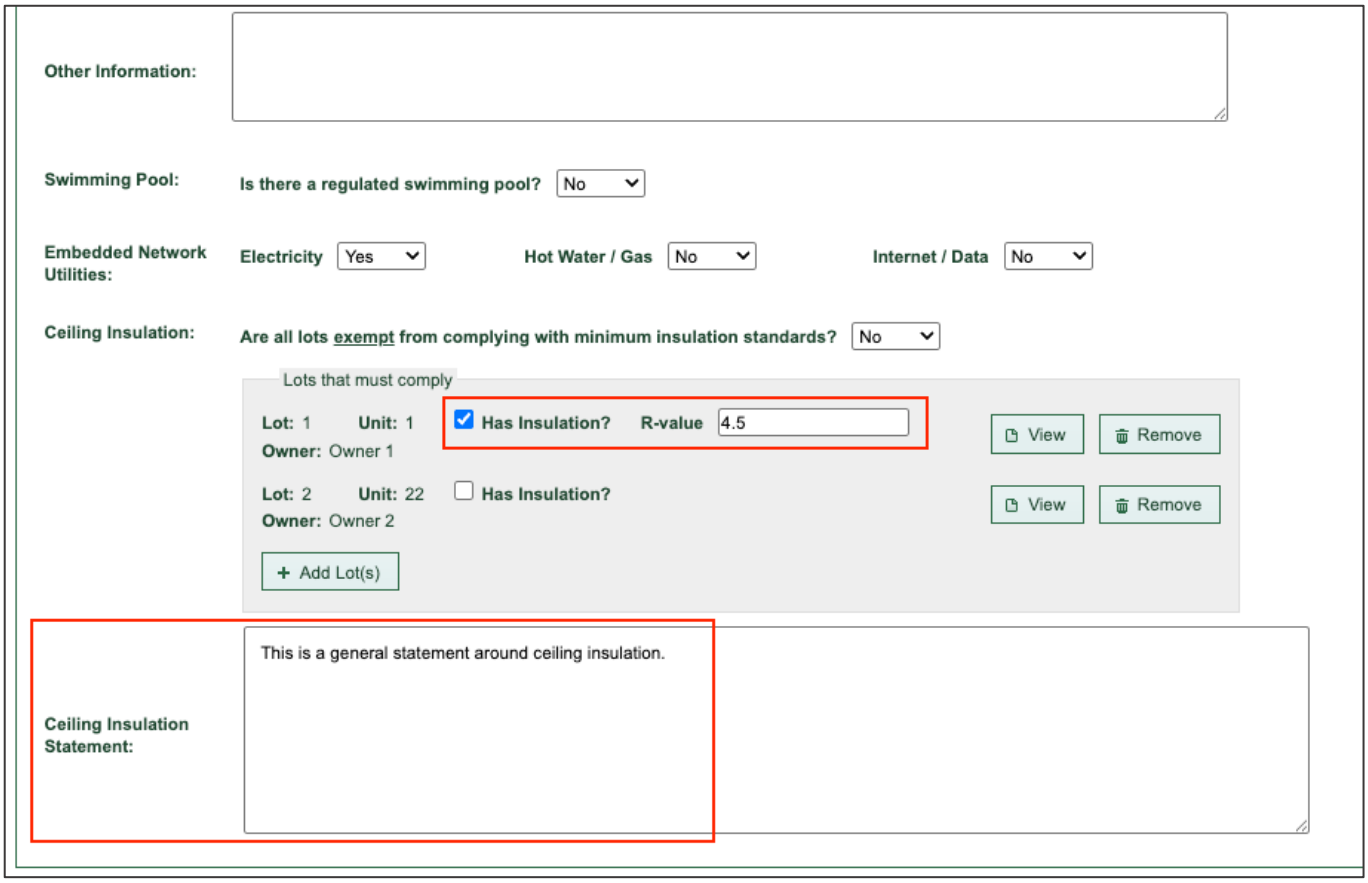
Performance improvements

5. **Faster and more reliable portal -** We're continuously working behind the scenes to make the PropertyIQ Portal faster and more reliable. These changes may not be immediately visible, but they significantly enhance the overall performance and stability of the Portal.

Item 1 – Legislation changes (ACT) - Ceiling insulation details

For an ACT building, under *Building card>Info tab>Info Certificates accordion>Details* you'll now see:

1. Updated checkbox name from 'Compliant' to 'Has insulation?'
2. New 'R-Value' field when the lot has insulation (optional field)
    a. This will auto-populate into the lot's certificate using the existing merge field {{Insulation_Min_Standards}} e.g. Yes, R-Value 5.
3. New 'Ceiling insulation statement' text field (optional field)
    a. Any text entered here will populate into certificates using the new merge field {{&Ceiling_Insulation_Statement}}.
    b. You'll need to add this merge field to your templates where necessary.



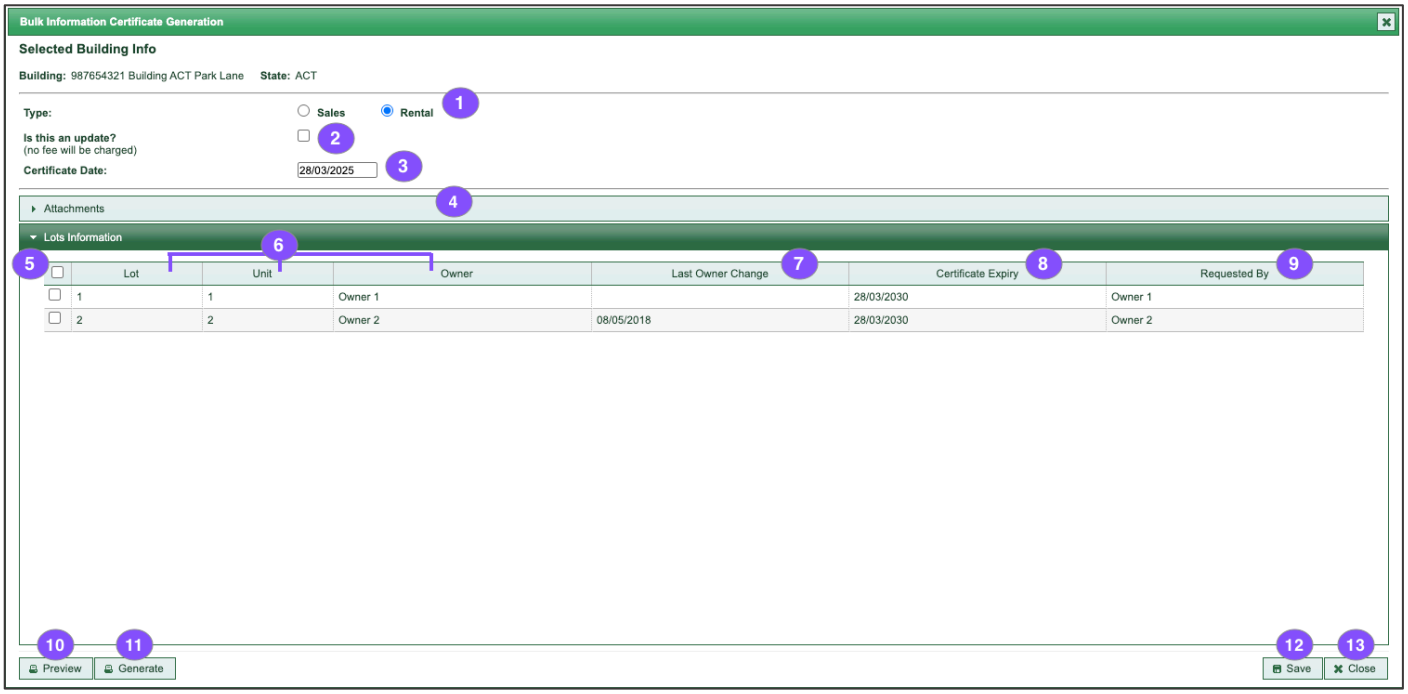
Item 2 - Legislation changes (ACT) - Issue rental certificates in bulk

We've made some changes to the bulk info certificate generation screen for an ACT building to allow you to generate Rental certificates in bulk for one or more lots.

Helpful Tip

When you need to issue an updated rental certificate to relevant lots when information changes, you can use the bulk certificate generation screen to quickly see which lots require one and issue it in bulk to all applicable lots.

- From the *Building card> Info Certificates button>* select *Rental* type> select *Update>* manage the attachments> view which lots have a Certificate Expiry date in the next 5 years> exclude the lots that have had a recent change of owner> then generate the certificate for only the applicable lots.
- The certificate documents (inc attachments) are available in the sidebar for downloading, and are automatically saved to Lot documents for each lot.



1. Select either *Sales* or *Rental* certificate type.
2. When selecting Rental type, also select if it's an updated certificate.
3. Enter the *Certificate Date* here. It will default to today's date and is editable.
4. You can manage the default and adhoc certificate attachments here.
5. Using the checkboxes, select the Lots you want to generate the certificate for.
6. The Lot number, Unit number and Owner name for each lot will show in these columns.
7. The date of the last owner change of the lot will show here. It will be blank if no change of owner has been processed in PIQ for the lot. This is a read-only field.
8. The date of the rental certificate expiry will show here. For an initial certificate, it will auto-populate with a date 5 years from today's date (editable field). If it's an updated certificate, it'll populate with the expiry date of the last certificate issued for that lot (read-only field).

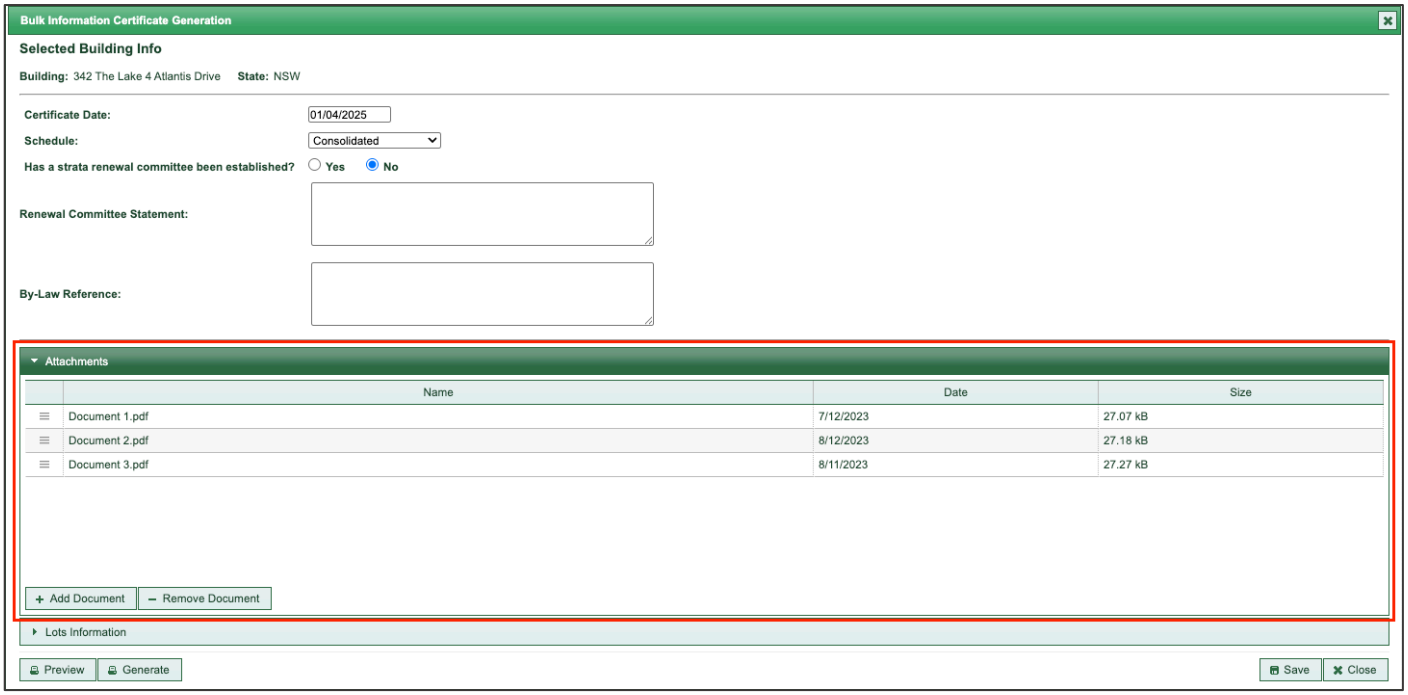
9. The name of the requestor will show here. It will auto-populate with the owners name. It is an editable field and can be changed.
10. Click *Preview* to preview a copy of the certificates for the selected lots. This will be processed as a background server task and will be available to view and download in your sidebar.
11. Click *Generate* to create the certificates for the selected lots. This will be processed as a background server task and will be available to view and download in your sidebar. The certificate documents will also be saved to each lots Lot Documents tab.
12. Click *Save* to save your selections and edits on this screen, and return later to complete.
13. Click *Close* to exit this screen. Any changes on this screen won't be saved.

Item 3 - Info certificates (ACT & NSW) – New attachments accordion for bulk certificates

You can now manage attachments when generating info certificates in bulk for ACT or NSW buildings under *Building card>Info Certificates button*.

- From the new *Attachments* accordion, you can view and manage the building's default certificate attachments (setup under *Building card>Info tab>Info Certificates accordion>Attachments tab*).
- You can also add adhoc attachments as required.

These documents will be included as attachments for all selected Lots when generating the certificate.

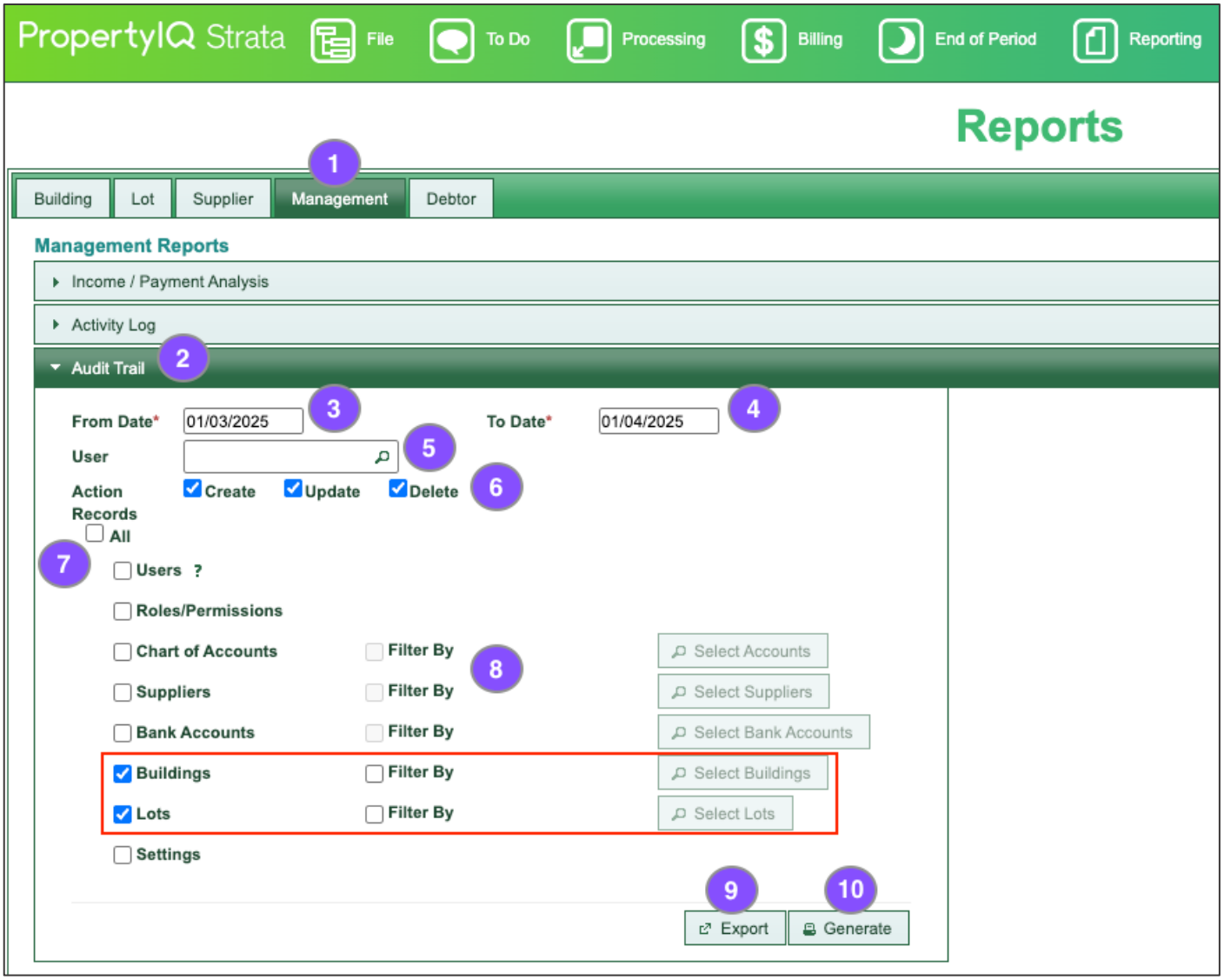


Item 4 – Audit trail report - View building and lot changes in audit trail report

You can now view and report on changes to building and lot details via the Audit Trail Report under *Reporting>Management>Audit Trail*. The new report options are highlighted in the red box below.

Note:

- The building and lot numbers will appear in the 'Updated Record' column of the export and report.
- Only existing details captured in the global audit trail and log of changes is available in the report. As not all field changes are currently captured in the audit trail, there'll be future improvements to include more details not currently recorded.



1. Under the *Reporting* menu, select *Management* tab
2. Select the *Audit Trail* accordion
3. Enter the *From Date*
4. Enter a *To Date*
5. Optionally select a *User*. Leave this blank to report on all users.
6. Tick an *Action*. The options are *Create*, *Update* or *Delete*. At least one must be selected.

7. Tick the *Records* type/s you want to report on. Tick the *All* checkbox to select all records or tick the individual checkboxes of each type. At least one must be selected.
8. You can also select a single entity by using the *Filter By* checkbox then selecting the applicable entities using the *Select* button e.g. single account, single building, single lot.

   Leave *Filter By* unticked to report on all entities of that record type e.g. all accounts, all buildings, all lots.
9. Click *Export* to create an export file that can be downloaded from the sidebar. See example export below.
10. Click *Generate* to create a PDF report that can be downloaded from the sidebar. See example report below.

Example of audit trail export for Building and Lot record types

PIQ Example

99 Test Road abc, Address 2 abc, Address 3 abc TESTVILLE ABC NSW 21111 ABN: 48 144 952 287 239

Ph: 6141497399 Email: oz.monkul+company@macquarie.com

Printed: 01/04/2025 07:20 pm User: Nicki Scrivener 2

Audit Trail Report

Date & Time	Action	User	Record	Field	Old Value	New Value	Updated Record	Related Record
31/03/2025 01:46 pm	Update	PIQ Michael	Buildings	CeilingInsulationExempt		0	14324 Sample	
31/03/2025 01:46 pm	Update	PIQ Michael	Buildings	Manager	Ozmulti	aldrin Strata	14324 Sample	
28/03/2025 05:04 pm	Update	Nicki Scrivener 2	Lots	Meeting Notices Address 1	akhil.arora@test	Address 2	SP 987654321 Lot 2	
28/03/2025 05:04 pm	Update	Nicki Scrivener 2	Lots	Utility Notices Address 1	akhil.arora@test	Address 2	SP 987654321 Lot 2	
28/03/2025 05:04 pm	Update	Nicki Scrivener 2	Lots	General Correspondence Address 1	akhil.arora@test	Address 2	SP 987654321 Lot 2	
28/03/2025 05:04 pm	Update	Nicki Scrivener 2	Lots	Levy Notices Address 1	akhil.arora@test	Address 2	SP 987654321 Lot 2	
28/03/2025 05:04 pm	Update	Nicki Scrivener 2	Lots	Address 1	akhil.arora@test	Address 2	SP 987654321 Lot 2	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Meeting Notices Name	vi.eliseo+multipl	Owner 2	SP 987654321 Lot 2	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Utility Notices Name	vi.eliseo+multipl	Owner 2	SP 987654321 Lot 2	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	General Correspondence Name	vi.eliseo+multipl	Owner 2	SP 987654321 Lot 2	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Levy Notices Name	vi.eliseo+multipl	Owner 2	SP 987654321 Lot 2	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Owner Name	vi.eliseo+multipl	Owner 2	SP 987654321 Lot 2	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Meeting Notices Address 1	charoo.arora@	Address 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Meeting Notices Name	vi.eliseo+multipl	Owner 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Utility Notices Name	vi.eliseo+multipl	Owner 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	General Correspondence Name	vi.eliseo+multipl	Owner 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Levy Notices Name	vi.eliseo+multipl	Owner 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Owner Name	vi.eliseo+multipl	Owner 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Utility Notices Address 1	charoo.arora@	Address 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	General Correspondence Address 1	charoo.arora@	Address 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Levy Notices Address 1	charoo.arora@	Address 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Address 1	charoo.arora@	Address 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Building Name	Test Building	Building ACT	987654321 Building	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Folio	NSW BRANCH		987654321 Building	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Building Class	Lease		987654321 Building	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Suburb	BARANGAROO	KINGSTON	987654321 Building	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Street Name	Test Street	Park Lane	987654321 Building	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Manager	Abigail JJ	aldrin Strata	987654321 Building	
28/03/2025 04:51 pm	Update	PIQ: nitinm	Buildings	Building Name	Green Building-	Green Building	DEV-FEB-BUILDING	
28/03/2025 04:51 pm	Update	PIQ: nitinm	Buildings	Building Name	Green Building	Green Building-	DEV-FEB-BUILDING	
28/03/2025 10:43 am	Update	Faith Lin	Lots	Paid To		30/06/2024	SP 1 Lot 96	
26/03/2025 12:32 pm	Update	Caroline Fong	Lots	Formal Tenant	No	Yes	SP 987 Lot 999	
26/03/2025 12:32 pm	Update	Caroline Fong	Lots	Tenant Name		formal tenant	SP 987 Lot 999	
26/03/2025 12:32 pm	Update	Caroline Fong	Lots	Owner Occupier	Yes	No	SP 987 Lot 999	
26/03/2025 12:32 pm	Update	Caroline Fong	Lots	Property Manager		Ray White	SP 987 Lot 999	

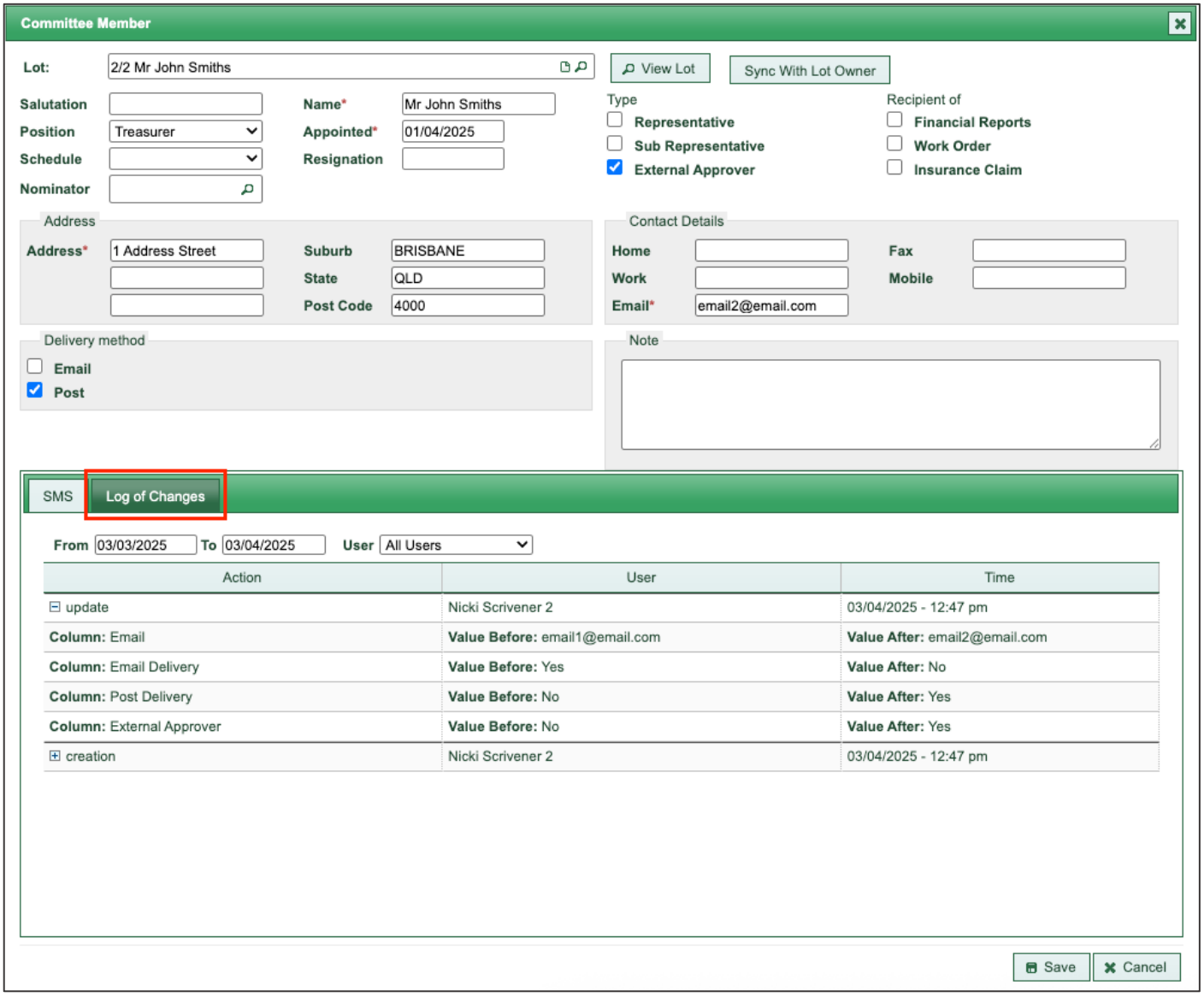
Example of PDF report for Building and Lot record types

ptldev02_demo

99 Test Road abc, Address 2 abc, Address 3 abc TESTVILLE ABC NSW 21111 ABN: 48 144 952 287 239
Ph: 6141497399 Email: oz.monkul+company@macquarie.com
Printed: 01/04/2025 07:26 pm User: Nicki Scrivener 2 Page 45

Audit Trail Report

Date & Time	Action	User	Record	Field	Old Value	New Value	Updated Record	Related Record
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	General Correspondence Address 1	charoo.arora@macquarie.com	Address 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Levy Notices Address 1	charoo.arora@macquarie.com	Address 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Lots	Address 1	charoo.arora@macquarie.com	Address 1	SP 987654321 Lot 1	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Building Name	Test Building Charoo	Building ACT	987654321 Building ACT	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Folio	NSW BRANCH		987654321 Building ACT	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Building Class	Lease		987654321 Building ACT	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Suburb	BARANGAROO	KINGSTON	987654321 Building ACT	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Street Name	Test Street Charoo	Park Lane	987654321 Building ACT	
28/03/2025 05:03 pm	Update	Nicki Scrivener 2	Buildings	Manager	Abigail JJ	aldrin Strata	987654321 Building ACT	
28/03/2025 04:51 pm	Update	PIQ: nitinm	Buildings	Building Name	Green Building-updated	Green Building	DEV-FEB-BUILDING Green Building	
28/03/2025 04:51 pm	Update	PIQ: nitinm	Buildings	Building Name	Green Building	Green Building-updated	DEV-FEB-BUILDING Green Building	
28/03/2025 04:16 pm	Update	Nicki Scrivener 2	Buildings	Ceiling Insulation Statement	Line 1 Line 2 Line 3 Line 4 Line 5 Line 6 L	This is a general statement around ceiling insulation.	4556 The Atrium	
28/03/2025 04:16 pm	Update	Nicki Scrivener 2	Buildings	EmbeddedNetworkInternet		0	4556 The Atrium	
28/03/2025 04:16 pm	Update	Nicki Scrivener 2	Buildings	EmbeddedNetworkElectricity		1	4556 The Atrium	
28/03/2025 04:16 pm	Update	Nicki Scrivener 2	Lots	Building>Info Certificates>Ceiling Insulation>Lot must comply>R-value	4	4.5	SP 4556 Lot 1	
28/03/2025 04:15 pm	Update	Nicki Scrivener 2	Lots	Building>Info Certificates>Ceiling Insulation>Lot must comply>R-value		4	SP 4556 Lot 1	
28/03/2025 04:14 pm	Update	Nicki Scrivener 2	Lots	Building>Info Certificates>Ceiling Insulation>Lot must comply	No	Yes	SP 4556 Lot 2	

Item 5 - New layout and log of changes on committee card

1. New improved layout of committee card, with larger screen for easier viewing and editing.
2. New *Log of Changes* tab on each committee card to view changes made to the details and settings of each member.