Release Notes
August 2026

This release includes changes to:

- PropertyIQ
- PIQ+
- Portal

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COMMITTEE INVOICE APPROVALS

1. After a successful beta release, the **Committee Invoice Approvals** feature is now available to all clients. It replaces manual, email-based invoice approval processes with a seamless digital workflow across **PropertyIQ**, **PIQ+** and the **Portal**.

   Strata managers can configure and monitor approvals from within PropertyIQ, while committee members can view, approve and track invoices directly from the Portal — on any device.

   What this means for you

   - Less emails, more control — Move approvals out of your inbox and into the PropertyIQ Portal.
   - Faster approvals — Automated notifications replace manual chasing; one-click approvals from any device can significantly reduce the average 6 to 7 day wait time.
   - Complete visibility — Every action is tracked in real-time, with a transparent audit trail of who approved what and when.

   How it works across the platform

Where	What you can do
PropertyIQ	Configure invoice approval workflows and manage settings.
Portal	Committee members view, approve and track invoices under the new **Approvals** menu. They can also pause an invoice approval and add comments.
PIQ+	Monitor and manage outstanding approval tasks in the new **Task Centre**. You can also view and reply to comments made by committee when they've paused an invoice approval.

2. **New user permission for PIQ+ Task Centre** - A new permission controls who can access the Task Centre menu in PIQ+.
   - New permission in *PIQ>Utilities>Security>Roles* for *PIQ+-Task Centre-View*
   - Users with this permission can see and action committee invoice approval tasks in the PIQ+ Task Centre.
   - On release of these changes for existing user roles and permissions: If a user has existing permission *Processing-Supplier Payments* enabled THEN this new permission will also be enabled by default.

3. **New portal configuration setting for 'Approvals' page in Portal** – Global / Folio configuration for owners and committee members.
   - Configuration in *PIQ Portal admin > Configuration > Owner/Committee tab > Approvals page.*
   - Controls visibility for owners and committee members of the approvals page if invoice approvals in portal are enabled for their building.
   - This will be enabled for committee members and disabled for owners by default.

Resources

- Step-by-step guide: PIQ+ Task Centre and Invoice Approvals guide or visit our website here.
- Portal help article for lot owners and committee members: View here
- Feature overview video: Watch here

What you need to know

To prepare for Invoice Approvals and Single Sign-On (SSO), the following changes have been made to your PropertyIQ automatically.

- **User login names and email addresses have been automatically updated** to ensure each user has a unique email address across your system. This is required for SSO to function correctly. You may notice some usernames or email addresses in your system have changed. Any automatically updated accounts can be identified by one or both of the following:
    - A **system-assigned email address** (where no email previously existed) — these will appear in the format 'username@migratedusers.propertyiq.com.au'
    - A **modified email address** (where a duplicate existed) — these will have an alias suffix added e.g. username+1@domain
- **SSO between PropertyIQ and PIQ+ has been enabled** for your site. From this release, your users will see a **new login screen** when accessing PropertyIQ.

What you need to do

We recommend:

- Notifying your team ahead of release that the login experience is changing
- Reviewing your user accounts under *PIQ>Utilities>Security* and update any changed email addresses to the user's correct and current email address, and also deactivate any old or inactive accounts.
- Reviewing and updating user permissions for PIQ+ Task Centre under *PIQ>Utilities Security>Roles.*
- Reviewing and updating the configuration of your portal for the 'Approvals' page under *Portal>Configuration.*

If you have trouble logging in after the release, please contact PropertyIQ Support at support@propertyiq.com.au.

User Permissions

4. **New screen design for Roles and Permissions -** The Roles and Permissions screen under *Utilities>Security>Roles* has been updated with layout improvements to make it easier to view and manage user role configurations.

5. **Lot Entitlements permission**
   - New permission: **Buildings-Edit Lot Entitlements**
   - Controls the ability to edit Unit of Entitlement (UOE), Interest Schedule Entitlement (Int Ent) and Unit of Liability (UOL) fields across three areas:
     - **Lots** — UOE/UOL/Int Ent fields when editing a lot
     - **Building card** — UOE/UOL/Int Ent fields when editing a building
     - **Schedules screen** — the contribution schedule weightings (UOE/UOL/Int Ent)
   - Without this permission, these fields will be read-only. Users can still set entitlement values when **adding** a new lot or building.
   - **On release:** If a user's role has the existing **Lots-Edit** or **Buildings-Edit** permission, the new permission will also be enabled by default. Review and adjust as needed.

6. **Buildings – Due Notice attachments and cover pages**
   - New permission: **File-Buildings-Edit Due Notice Attachments / Cover Pages**
   - Controls the ability to maintain (add, edit, remove) due notice attachments and cover pages on the building card
   - Without this permission, users can still **view** existing due notice attachments and cover pages, but will not be able to add, edit or remove them
   - **On release:** If a user's role has the existing **File-Buildings-Edit** permission, the new permission will also be enabled by default. Review and adjust as needed.

7. **Fee Schedules – Prevent duplicate fee schedule runs**
   - New permission: **Billing-Billing-Process Duplicate Fee Schedules**
   - Controls who can re-run a Fee Schedule for a building that has already been processed, helping prevent accidental duplicate charges.
   - Without this permission, users can still proceed with the fee schedule run for buildings without duplicate fees. A warning will appear and list the duplicates that will be excluded from the run.
   - **On release:** This new permission is **disabled** by default. Review and adjust as needed.

8. **Activity Log – Global and Building charges**
   - New permission: **Processing-Activity Logs-Manage Global / Building Charges**
   - Controls who can add new global and/or building charges directly from the Activity Log screen.
   - **On release:** If a user's role has either of the existing **Processing-Activity Logs** permissions for **Add** or **Edit**, the new permission will also be enabled by default.

9. **Portal Control Panel – registration button visibility refined**
   - Following the July 2026 release, permissions for *Utilities>Portal Control Panel* have been further refined. Users with **Portal Control Panel-View** permission only, can now see the main 'Register Lots Owners' and 'Register Committee Members' buttons and screens without needing any edit or manage registration permissions, allowing them to simply view owners and members who are registered. A user also doesn't require edit portal control panel to manage registrations.
   - The Register/Deregister action buttons on the registration screens are still controlled by the new **Manage Portal Registration** permission, and any changes to portal document categories and report settings are still controlled by **Portal Control Panel-Edit** permission.

What you need to do

Please review your default and custom roles under *Utilities menu>Security>Roles* and make any necessary changes to user permissions.

New default notice templates – DEFT changes

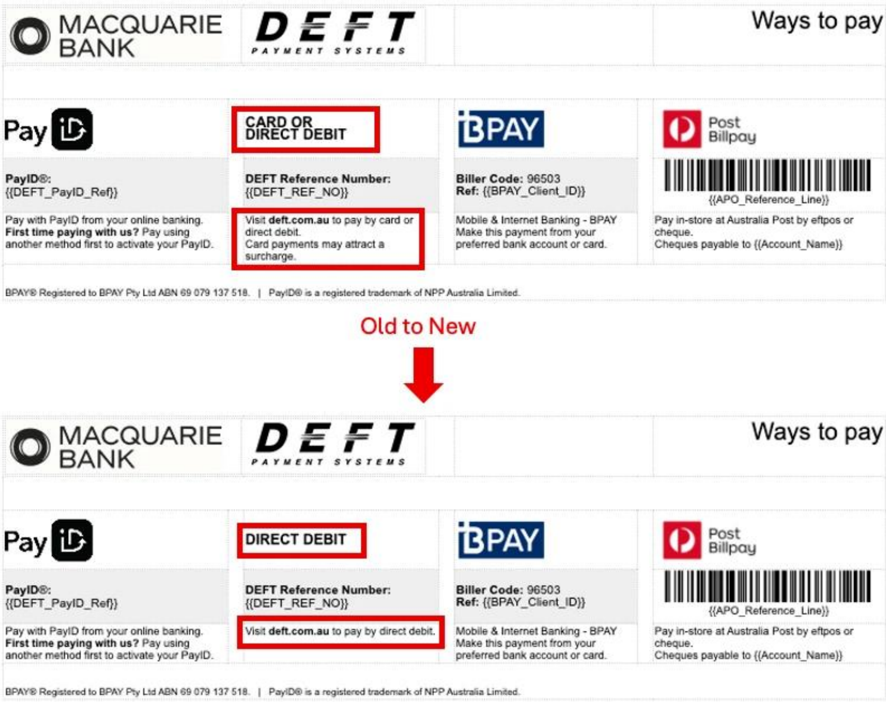
10. New default system templates to remove DEFT card payment option

New default system notice templates are now available in PropertyIQ with card removed as an available DEFT payment option.

- From **1 October 2026**, Macquarie Bank is permanently removing card as a payment option for DEFT payments.
- The new default system templates in PIQ have been updated to reflect this change. These are accessible when you click the *+New* button under *File>Templates*.
- We have **not** updated your existing in-use templates to avoid overwriting any customisation and branding that clients have made to their templates.

What you need to do

1. **Review new templates:** All system default notice templates that include a DEFT payment slip have been updated. This includes the due/fee, arrears, final, legal, special and utility levy notices. The minor changes are highlighted below.



2. **Start using new/updated templates in your PropertyIQ**

   - <u>**Option 1** – Update your existing templates</u> in use, you can make some minor adjustments to DEFT payment section as highlighted above.
   - <u>**Option 2** - Create new templates in your PropertyIQ</u>

     1. For the templates you use, you'll need to **manually add** the new version templates to your PIQ. Select *File>Templates* and then the *+New* button. You'll find the new templates in the default list and can customise the content, the same way you do for your existing templates.
     2. Once you've added and customised the new templates under *File>Templates*, **apply them** as the new system default by checking the box in the *Selected* column.

We recommend completing this change **before 1 September 2026** to ensure lot owners receive accurate payment information on their upcoming levy notices.

TXN Processing

11. Waive penalty interest when allocating levy payments via TXN processing
Expanding on the waive interest functionality released in July 2026 - which covered manual deposits and lot transfer adjustments - you can now also waive penalty interest when allocating levy payments through TXN file processing. This provides a consistent way to waive interest across all levy payment allocation methods.

12. Improved validation for manual allocations in TXN processing
There's now improved field validation on the allocation screen when amounts are manually entered during TXN processing. Any errors or inconsistencies with keyed amounts vs total deposit amount will show a clear validation error before the transaction is processed.

13. Issue with display of informational transactions
An issue has been fixed where, after clicking 'Ready for Processing' on a TXN file, only the first informational transaction was visible in the Informational tab. Navigating away to another tab and returning caused all transactions to appear correctly. This was a display issue only — all informational transactions were always included correctly in the TXN Summary Report when processed. The Informational tab now correctly displays all transactions when the file is first loaded.

Info Certificates (QLD)

14. QLD Information Certificate levy fixes
Two issues have been resolved affecting levies displayed on QLD certificates for *Body Corporate Certificate (Disclosure)*, *BUGT Body Corporate Certificate (Disclosure)* and *Information Certificate*.

- **Levies now display in correct chronological order.** Previously, levies could appear in a mixed or random order due to an error in the date sort logic.
- **Standard and Insurance Levies dated after current levy year are now correctly excluded.** Previously, where a levy instalment period extended beyond the current levy year end date, the standard levy for that period was correctly excluded — but the matching insurance levy was not, causing it to appear without a corresponding standard levy. Both levy types are now correctly filtered out to show only levies within the current levy year, plus any amounts in arrears.
  <u>***Note***</u>*:* The approved form explicitly states to disclose levies for the current financial year only. We recommend attaching the lot ledger summary to the certificate for completeness.

General

15. **Username now visible in Audit Trail for PIQ+ meeting actions**
    When a PIQ user edits a PIQ+ meeting, their username is now recorded in the Audit Trail and Log of Changes. Previously, changes made to PIQ+ meetings appeared in the audit record without identifying which user made the change. This provides a clear and complete paper trail for all meeting edits.

16. **Special Levies screen — UOE column label corrected for VIC buildings**
    The column heading in the Special Levies screen was incorrectly displaying **UOE** for Victorian buildings. It now correctly shows **UOL** (Unit of Liability), consistent with how lot entitlements are labelled elsewhere in the system for VIC buildings (e.g. the budget screen).

17. **Building card cannot be opened when schedule level balances are enabled**
    An issue has been fixed where buildings with schedule level balances enabled could not be opened. The building card displayed an error instead of loading. Affected buildings can now be opened and managed as expected.

18. **Duplicate lots — Schedule UOE not auto-populating**
    An issue has been fixed where the Schedule UOE value was not automatically populating for lots created using the *Duplicate Lots* function. Previously, the duplicated lot showed a Schedule UOE of 0 instead of copying the correct value from the source lot. The UOE now correctly carries across to all duplicated lots.

19. **Manual Deposits — Remove button not working on allocation line items**
    An issue has been fixed where clicking the 'Remove' button on an allocation line item while editing a manual deposit was being ignored — the line item remained on screen despite clicking remove. The button now correctly removes the selected allocation line item when editing a manual deposit.

20. **Lot card – Delivery preference fields**
    An issue has been fixed where Delivery preference fields on a lot were incorrectly greyed out when in edit mode, preventing changes. This has been resolved.

Meetings

1. **Schedule merge field settings**

For buildings with multiple contribution schedules, financial and budget related merge fields in motions and meeting documents can now be configured to show amounts for a single schedule instead of a combined total across all schedules.

This is particularly helpful to users creating separate Admin vs Insurance budget motions for QLD, or single-OC budget motions for VIC, as some examples.

- **New 'Schedule data settings' button**
  - When viewing a meeting, a new '*Schedule data settings*' button appears in the top right corner of the screen when the building has more than one active schedule AND financial merge fields are present in any motions or meeting documents for that meeting.
  - Clicking this button opens a screen where you can:
    - see which financial merge fields are being used in the meeting, and where e.g. a motion, notice document, minutes document.
    - for a motion; assign a specific schedule to the motion, or leave it set to 'All Schedules' for a combined total. This will be applied to all merge fields within the motion.
    - for notice document or minutes document; assign each merge field occurrence to a specific schedule, or leave it set to 'All Schedules' for a combined total. For example, if you use the same merge field twice in the notice document (e.g. proposed admin budget), you can choose one to be assigned to Schedule1 and the other to be assigned to Schedule2.
  - When meeting documents are previewed and generated, each financial merge field will display the correct per-schedule value.

See below for detailed screenshots.

- **Visual indicators for merge fields without a schedule assignment**
  - Financial merge fields in motions and documents that have not yet been assigned to a schedule are highlighted in orange on screen so they are easy to identify.
  - An alert banner also appears to prompt you to complete the schedule configuration. The alert banner appears at the top of the meetings page, when viewing or editing a motion, and when viewing or editing the notice document and minutes document.
  - Once all financial merge fields are mapped to a single schedule or all schedules, the alert banner disappears and relevant data is displayed in all merge fields.

See below for detailed screenshots.

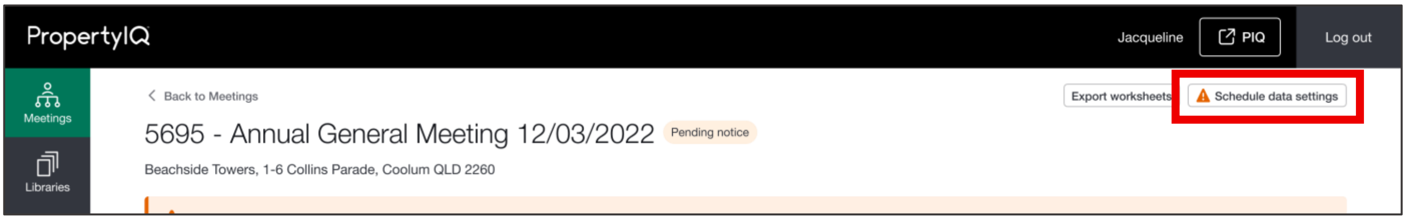
- **Schedule-level merge fields not available in email templates** – Schedule-specific financial merge fields are not included in the email template merge field library. Email templates that contain financial merge fields will continue to work using the all-schedules combined totals.

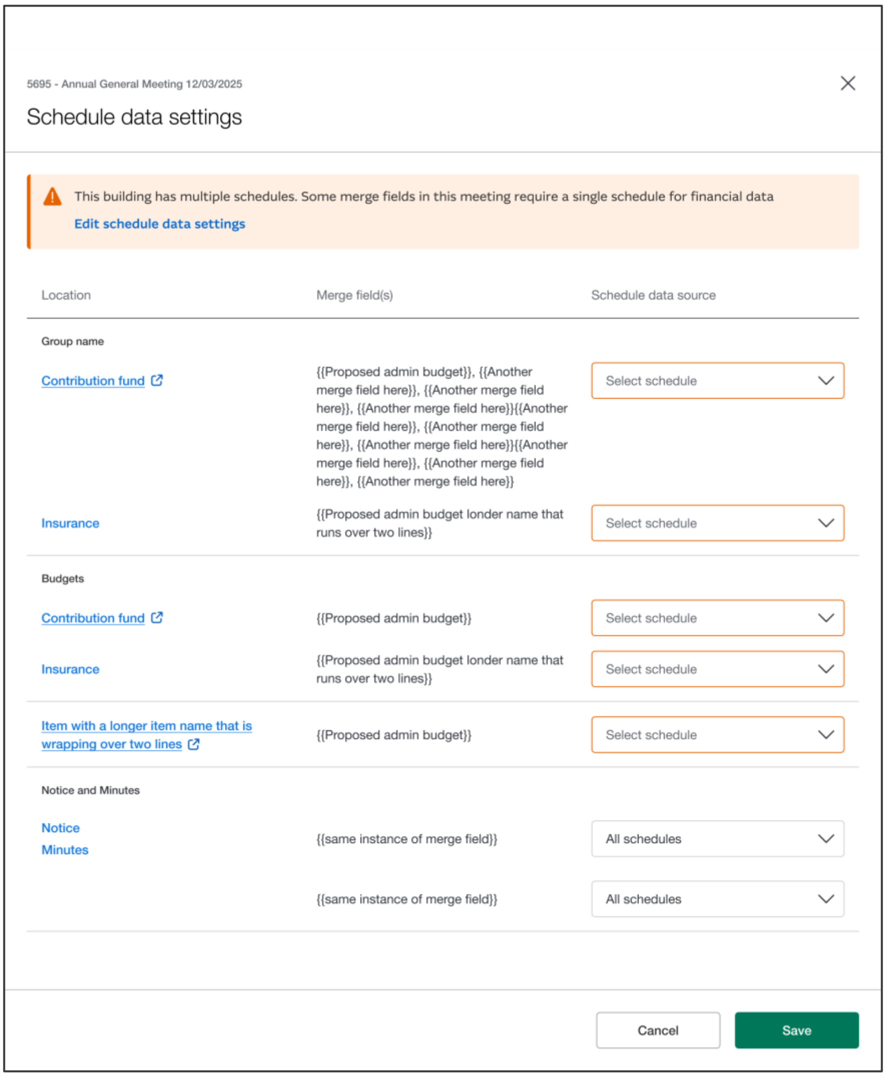
2. General

- **Filter dropdowns show "All" when no option is selected** – Filter dropdowns in PIQ+ now display "All" as the label when no specific option has been selected, making it clear that the full unfiltered list is being shown.
- **Meeting details – fix for input being overwritten when editing** – An issue has been fixed where editing a meeting could cause details you had already typed to be silently overwritten if venue or building information loaded slowly in the background. The meeting form now waits for all data to load before allowing edits.
- **Meeting document distribution – fix for missing file size** – An issue has been fixed where distributing a meeting document with a missing file size caused an error and prevented distribution from completing.

Schedule data settings

- When viewing a meeting, a new '*Schedule data settings*' button appears in the top right corner of the screen when the building has more than one active schedule AND financial merge fields are present in any motions or meeting documents for that meeting.
- For each motion; assign a specific schedule to the motion, or leave it set to 'All Schedules' for a combined total. This will be applied to all merge fields within the motion.
- For notice document or minutes document; assign each merge field occurrence to a specific schedule, or leave it set to 'All Schedules' for a combined total. For example, if you use the same merge field twice in the notice document (e.g. proposed admin budget), you can choose one to be assigned to Schedule1 and the other to be assigned to Schedule2.





Visual indicators for merge fields without a schedule assignment

- Alert banner appears on various screens until all merge fields have been assigned to a schedule
- Merge fields without a schedule assignment are highlighted in orange on screen