PropertyIQ

Release Notes
December 2025

This release includes changes to:

- PropertyIQ
- PIQ+
- Portal

CONTENTS

Reporting

1. **Delegated functions report** – A new delegated functions report is now available that creates a summary of important tasks and actions you've completed in PropertyIQ for a building over a specific period.

   - New option under global reporting menu – You'll see a new accordion called *Delegated Functions* under *Reporting>Building tab*. From here, you can select the *To* and *From* dates and a single building to report on. The *To* and *From* dates automatically default to 6 months prior to today's date.

   - Delegated functions PDF report – There are 12 sections that will always appear in the report, as listed below. Each section will be populated with data based on whether there are activities/items to report on for the specified period. Otherwise, the text "No information available for this period" will be shown in the section if there is no data.

       i. **Certificates** – Is included when 'certificate date' of a certificate falls within report period.
       ii. **Change of Ownership** - Is included when 'settlement date' of a lot falls within report period.
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       iv. **Insurance Claims** - Is included when 'submitted date' falls within report period. Claims with no submitted date will not be included in the report.
       v. **Insurance Policy(ies) & Commission Received -** Is included when 'From date' of a policy falls within report period.
       vi. **Meetings -** Is included when 'meeting date' of a meeting falls within report period.
           o *Note*: Only meetings created in *PIQ>To Do>Meetings* are included. Meetings from PIQ+ will be included in the report as part of a future release.
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       xi. **Work Orders and Quote Requests** - Is included when 'created date' of a work order and/or quote request document falls within report period.
       xii. **Other Delegated Functions** – This includes all adhoc items entered in the *Delegated Functions Register* under *Building card>Registers tab*. The register items are included when the 'date' of an active register item falls within report period.

   See <u>below</u> for detailed screenshots.

General

2. **Application Settings > TXN Processing explanatory text** – As a result of user feedback, the explanatory text for <u>TXN Pre-Allocation Rule #5</u> (NSW) and <u>Autofill Settings</u> has been updated to provide more clarity on system behaviour.

   More specifically it now clarifies that receipting rule #5 <u>is</u> applied during automatic TXN pre-allocation even for partial payments, and that the receipting rules are <u>not</u> applied when clicking the autofill button during manual allocation of a receipt.

3. **Bulk credit transfer (NSW buildings)** – As a result of changes in October 2025 release for NSW legislation changes (which introduced a specific order for receipting payments against arrears), changes have been made to the bulk credit transfer function for NSW buildings.

   The bulk credit transfer will now only allocate credit towards principal amounts and will no longer allocate credit to interest due. This ensures all principal amounts are paid first and in accordance with Receipting Rule #5 for NSW buildings. This change also aligns to how the credit transfer works for all other States, where credit is never allocated against interest.

   Note: Further improvements are planned for the bulk credit transfer function in the future, to allow more flexibility and control over allocations.

4. **Interest Waiving changes > Fix for levies with both positive and negative amounts –** As a result of changes in October 2025 release for the removal of automatic waiving of interest, an issue has been identified and fixed. The issue related to levies that have a positive and negative amount AND have outstanding interest, which were showing as 'Paid' on the lot ledger when the principal is fully paid but interest remains outstanding. This caused the levy not to appear on Direct Debit and Due Notice screens. We confirm that this issue has been fixed as part of this release.

5. **Supplier documents tab –** Further performance improvements have been made to the documents tab of the Supplier card. As a result of these latest improvements, the temporary restriction on the tab's date fields for filtering and searching have been <u>removed</u>. Note: In the July 2025 release, the supplier card date range had been defaulted to 3 months, with a maximum search period of 1 year.

Meetings

1. **Delete meetings**
   - You can now delete a meeting from the *Meetings* page using a new delete option in the action menu for each meeting.
   - To be able to delete a meeting, you must have the user permission for '*Meetings>Delete*' enabled in *PIQ>Utilities>Security>Role permissions*.
   - You cannot delete a meeting if the notice or minutes for that meeting have been distributed.

   See below for detailed screenshots.

2. **Duplicate email and meeting templates** – To save you time and streamline the setup of your templates, you can now duplicate email and meeting templates in the *PIQ+ Meetings Library* using the 'duplicate' option in the action menu of an existing template.

   - Email templates
     - This will create a duplicate email template with the same description, folio, meeting type, reply to address, email subject and email body text. It will append "(copy)" to the end of the description.
     - You can change the description and the other fields as required when creating it, but you cannot change folio or meeting type.

   - Meeting templates
     - This will create a duplicate meeting template with the same title, folio, meeting type, agenda items, notice and minutes document, and linked email templates.
     - You'll be prompted to confirm the title when creating it. It will append "(copy)" to the end of the title automatically.
     - As with other templates, you cannot change folio or meeting type.

   See below for detailed screenshots.

3. **Use a motion or agenda item template more than once in a meeting template** – You can now insert the same motion or agenda item template more than once from the global library into your meeting template. This is useful when you have a blank 'placeholder/template' motion in your library that's used for common issues that might appear more than once in your agenda e.g. repair quotes, approvals.

4. **Merge field improvements**
   - Levy instalments table – A change has been made to the '*Levy instalments table*' merge field table for VIC buildings to ensure that the relevant *Per Entitlement* merge fields are correctly using **schedule UOL** amounts for the budget.

   - Manager mobile – A new merge field {{Manager mobile}} is now available in the global merge field library under the *Building* group, and can be used in agenda items, email templates, and notice and minutes documents. This populates the mobile number of the manager linked to the building, if one is entered in *PIQ>Utilities>Security>User>Contact>Contact>Mobile* field.

   - BUGTA building type (QLD) - The QLD building type of "Building Units/Group Title" is now visible in PIQ+ where *Type* is referenced, specifically the meeting details page and {{Building Type}} merge field.

5. **General improvements and fixes**
   - File copy notice and minutes documents – The **file copy** document of the meeting notice and minutes is saved to building documents and is used for postal distribution when BING mailing house is enabled. A change has been made to the building file copy to **remove** (or blank out) any **personalised** merge fields so you no longer see empty placeholder merge fields on the document when it's sent to owners via Bing e.g. {{Owner Name}}, {{Lot number}}.
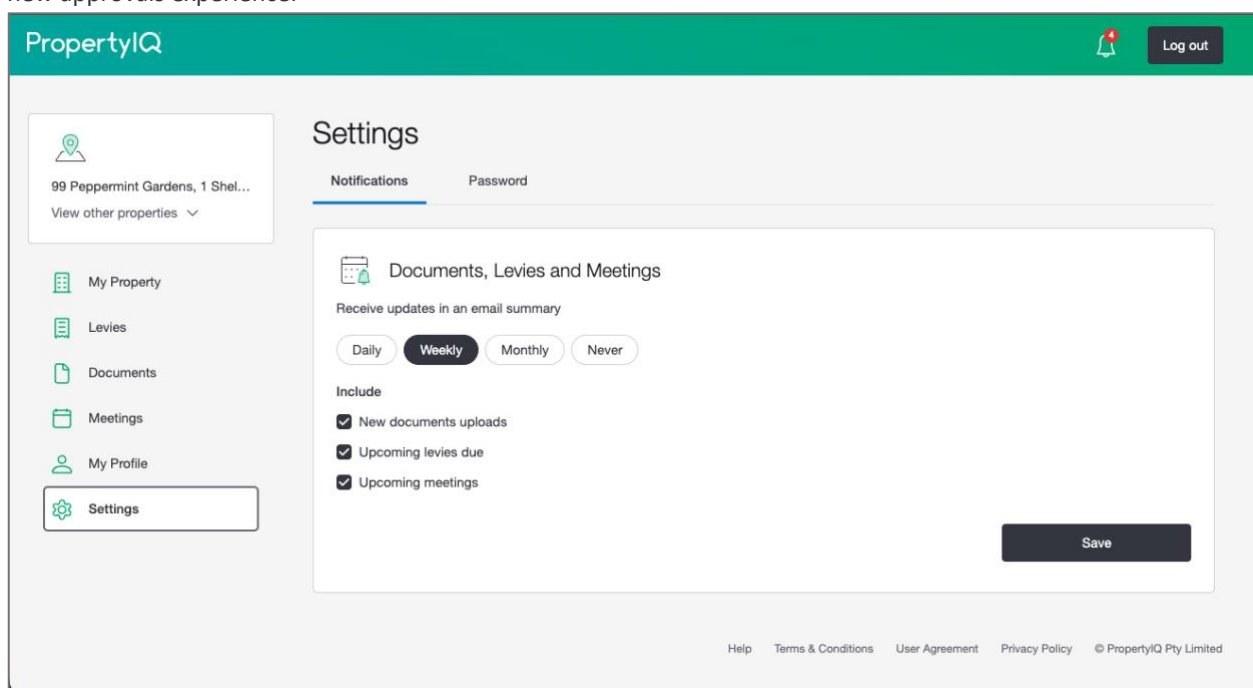
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- <u>Template editor > Merge field tables</u> – When in **edit** mode in the notice or minutes document editor and **refreshing** the browser page, it was causing an issue with the rows in a dynamic merge field table being duplicated. This issue has now been fixed.

- <u>Deleted documents</u> – Improvements have been made around error handling and notifications when viewing the list of attachments under notices/minutes, when one has since been deleted in PIQ and when attempting to add a deleted document as a new attachment. This can occur when you're viewing documents in PIQ+, the document is deleted in PIQ and has not yet synced/updated in PIQ+, and you try to attach the deleted document.

Notifications

1. **Mark all as read:** To help our users keep their notification list tidy, we're adding ability to mark all notifications as read with a single click.
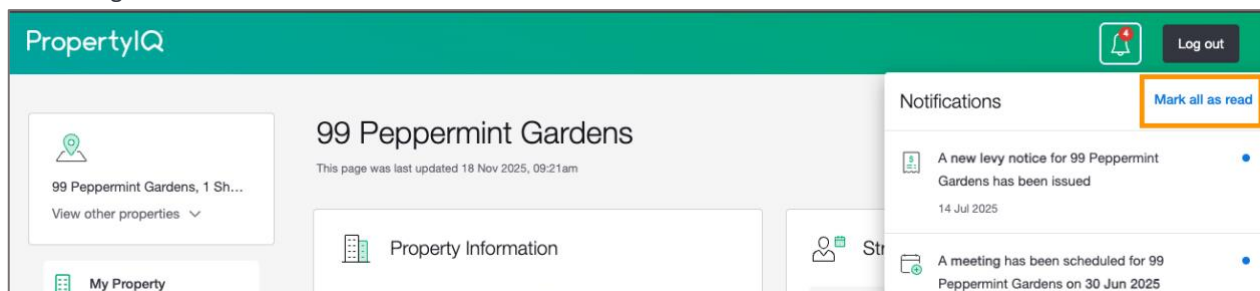
2. **A friendlier way to set preferences:** We've restructured the user settings to make it easier to set notification preferences and we're removing the option to turn off in-app notifications. This change is part of our move towards the new approvals experience.

3. **Redesigned email templates:** We've updated our "Latest activity in your PropertyIQ portal" email templates. The new layout is cleaner, easier to read, and provides more space for important information. These emails will now highlight as "PropertyIQ – Your portal summary for your property." and this subject will dynamically change depending on the number of properties our users have on their portal account.
   See next page for an example of new notification email.
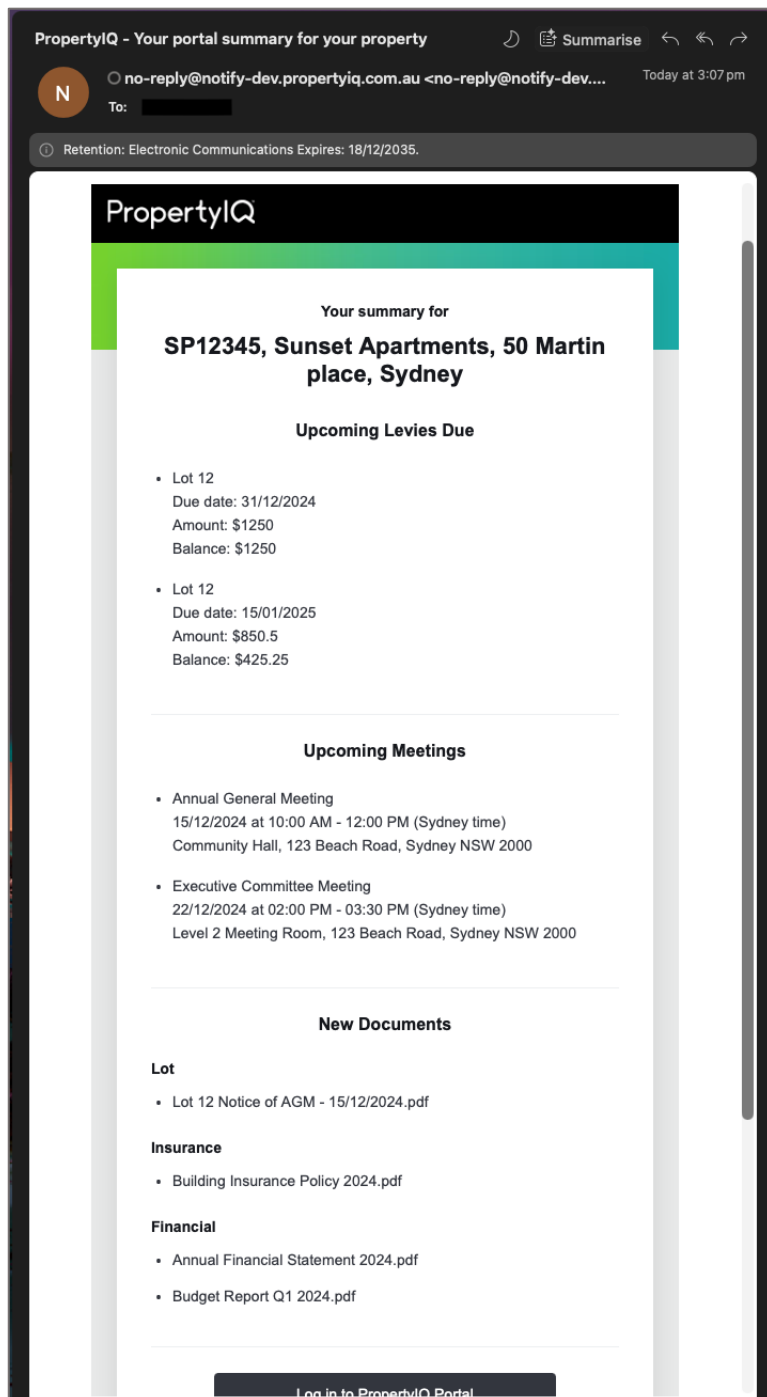
Documents

View documents in a new tab: When you click to view a document, it will now open in a new browser tab instead of automatically downloading. This will be particularly helpful for Safari users, as they will no longer need to disable their pop-up blockers. This change will also help save disk space for all users.

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See next pages for detailed screenshots, including an example report.

New 'Delegated Functions' accordion under Reporting>Building

The report is generated and downloadable from the jobs sidebar.

Example PDF report – Pages 1 and 2

Delegated Functions Report - S/Plan 1008
"Jordan Mews"
1 Jordan Boulevarde, FLEMINGTON, vic 3125
For the period 01/06/2025 to 30/11/2025

Certificates
No information available for this period

Change of Ownership

Settlement Date	Lot / Unit	Owner
17/11/2025	8/8	Ms C Owner

Correspondence

Letters - Lot	3
Letters - Committee	0
Emails - Outgoing	4
SMS	0

Insurance Claims
No information available for this period

Insurance Policy(ies) & Commission Received

Policy No	Insurer	Type	Renewal	Paid	Premium	Commission
1DC23456789	Active Insurance	Building/Common Property,Office Bearers	02/08/2026	28/07/2025	$7,890.00	$0.00

Meetings
No information available for this period

Notices - Debt Recovery

Issue Date	Lot / Unit	Owner	Type
18/11/2025	8/8	Ms C Owner	Arrears Notice
18/11/2025	9/9	Mrs B Owner	Arrears Notice

Notices - Levies

Issue Date	Lot / Unit	Owner
18/11/2025	8/8	Ms C Owner
18/11/2025	9/9	Mrs B Owner

Delegated Functions Report - S/Plan 1008
"Jordan Mews"
1 Jordan Boulevarde, FLEMINGTON, vic 3125
For the period 01/06/2025 to 30/11/2025

Payments

Payment Date	Payee	Invoice Date	Invoice Ref	Amount
14/11/2025	Jack of All Trades	09/09/2025	4088	$240.00
14/11/2025	Southpest Pty Ltd	09/10/2025	4089	$98.00
Total				**$338.00**

Receipts
No information available for this period

Work Orders and Quote Requests

Date	Job No	Summary	Supplier	Type
18/11/2025	415	Work order request	Southpest Pty Ltd	Work Order
18/11/2025	416	Quote request		Quote Request
18/11/2025	416	Quote request		Quote Request

Other Delegated Functions

Date	Title
14/10/2025	Adhoc delegated function item

Meetings - Delete a meeting

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- You <u>cannot</u> delete a meeting if the notice or minutes for that meeting have been distributed.

New option to delete a meeting

Notification and confirmation message when deleting a meeting

Notification when a meeting cannot be deleted (when notice or minutes have been distributed)
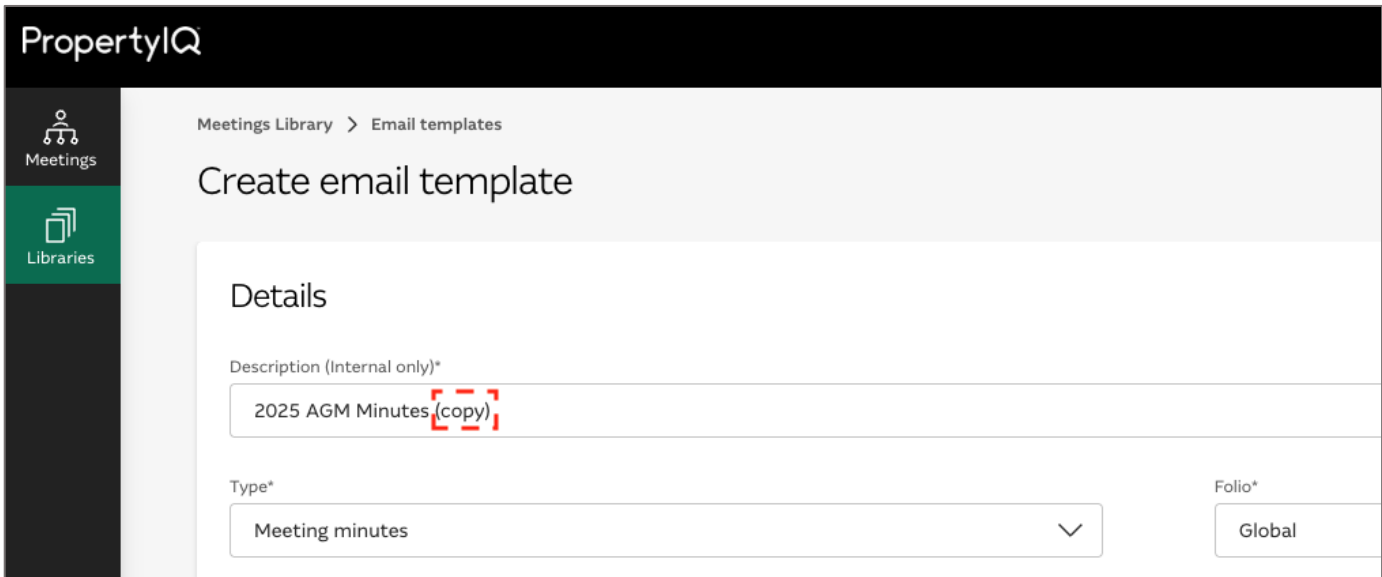
Meetings – Duplicate email and meeting templates

To save you time and streamline the setup of your templates, you can now duplicate email and meeting templates in the *PIQ+ Meetings Library* using the 'duplicate' option in the action menu of an existing template.

Duplicate an email or meeting template in the list
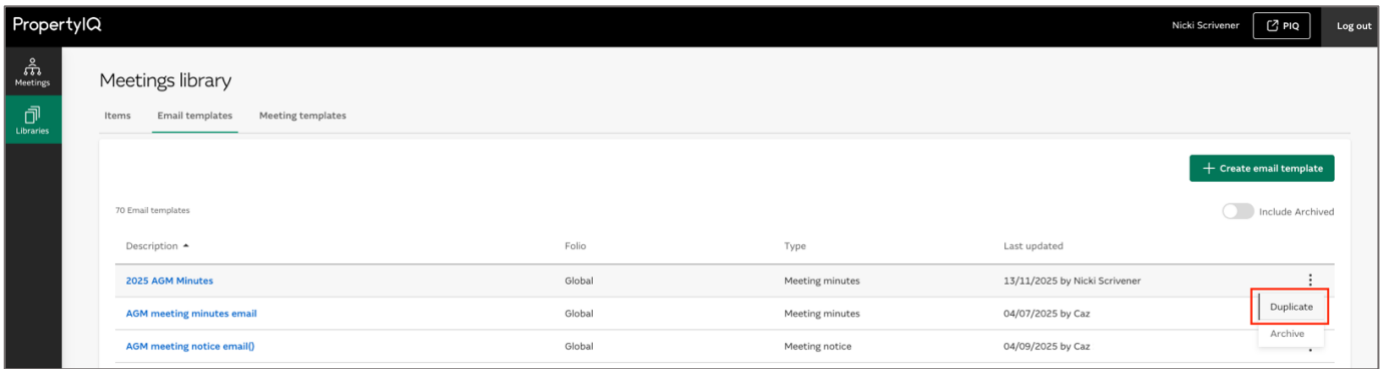
For an email template – "(copy)" is appended to the description. Update details before saving.

For a meeting template – "(copy)" is appended to the title. Confirm the title before saving.

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