# Release Notes
# September 2025

This release includes changes to:

- PropertyIQ
- Portal
- PIQ+

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## Info Certificates

1. **(<u>All States</u>) Attach balance sheet and lot ledger reports to certificates** – When generating an information certificate from the lot card, you can now attach certain financial reports to the certificate when generating.

   We've also improved the layout of the *Info Certificate Generation* screen to include a new '*Reports and Registers*' accordion. From here, you can select existing register reports and select any of the new options for a balance sheet report, owner ledger report and owner transaction summary.

   The reports you select here will be automatically generated and included in the published certificate document. The order of attachments in the generated document is (1) Certificate, (2) Financial reports, (3) Register reports, and (4) Adhoc attachments.

   **a.** <u>Balance sheet report</u>: This will generate a consolidated balance sheet for the building, or a balance sheet for a selected single schedule (if applicable). The *From* date defaults to the building's financial year start date and the *To* date defaults to today's date (certificate date). These dates are not editable. It is the same behaviour as generating a 'financial year to date' balance sheet report from the building card.

   **b.** <u>Owner ledger report</u>: This will generate a ledger report for the relevant lot. The *From* date defaults to levy year start date and *To* date defaults to levy year start date + 1 year. These date fields are editable and mandatory.

   **c.** <u>Owner transaction summary</u>: This will generate a transaction summary for the relevant lot. The *From* date defaults to levy year start date and *To* date defaults to levy year start date + 1 year. These date fields are editable and mandatory.

   See below for a detailed screenshot.

2. **(<u>QLD</u>) Merge field improvements for QLD Information Certificate**

   **a.** <u>Chargeback levies</u> - For more accurate reporting, any chargeback levies created after this release will now appear in 'Other amounts payable' section of the information certificate, instead of 'Special contributions' section.

      i. The types of chargeback levies are *invoice chargeback* (oncharge supplier invoice), *access register chargeback* (sell building access item), and *arrears/final/legal notice chargeback* (strike during due/fee notice run).

      ii. **<u>IMPORTANT NOTE</u>**: From September 2025 release, we're capturing the type of each chargeback special levy so they can be more accurately reflected in the sections of the certificate. Any chargeback levies created before this release will still appear under the 'Special contributions' section.

   **b.** <u>Insurance levies</u> – An issue has been fixed where the insurance levies for an Interest/ Insurance Schedule of a building were populating under both the Admin/Sinking tables and the Insurance table. Insurance levies will now only appear under the Insurance levies table.

   **c.** <u>Levy paid status</u> - We've improved the paid status of levies to ensure balances are clearer in the certificate. The 'Date Paid' column for annual and special contributions will now show:

      i. If the levy is **fully paid** = "dd/mm/yyyy" (current behaviour)

      ii. If the levy is **partly paid** = "Partly Paid (dd/mm/yyyy)", where the date is the most recent receipt against the levy

      iii. If the levy is **unpaid** = the field remains blank (current behaviour)

3. **(<u>NSW</u>) Merge field improvements for NSW certificates**

   **a.** When generating a Section 174 and Section 184 certificate, the relevant merge fields for admin arrears, sinking arrears, interest, credit and discount will now be calculated up to the certificate date, regardless of what year the levy arrears belong to. The balances will include levy arrears across previous, current and next financial years, and not just the arrears amount for the current year as it was doing previously.

**b.** When generating a Section 174 certificate, the {{Admin_Total}} and {{Sinking_Total}} merge fields will now show the total amount of levies raised in the current levy year, regardless of payment status. This now aligns with how the merge fields behave in the Section 184 certificate.

## General

4. **CSV imports** – An issue has been fixed where importing a .csv file with a large number of blank rows, under *Processing>Activity Log>Import* or *File>Documents>Upload Metadata*, would cause the import task to freeze and cause a server outage.

   To improve performance of .csv imports, any blank rows in a .csv file will now be ignored. A limit of 10,000 valid rows in the .csv file has also been introduced. This fix has been applied to activity log import, document metadata import, lot import and utility levies import.

5. **Bulk financial reporting** – To improve performance, when submitting multiple large jobs in a row for bulk financial reports under *Reporting>Building>Financial,* then the jobs will be queued and only one report job will be processed at a time.
6. **Document tabs** – To improve performance and loading time of documents, the date filters on certain document tabs have been defaulted to a set period, instead of automatically showing all documents from beginning of time. The building, lot and debtor cards have been defaulted to the last 5 years, and it can be cleared to show all documents. The supplier card has been defaulted to 3 months, and a maximum of 1 year can be searched. All other entities (meetings, insurance claims, access register, work orders) have no default date set.

## Improved Mobile Navigation

We've updated our mobile navigation to make it easier for owners and committee members to find they need. We've moved notifications out of the menu and replaced the hamburger icon with a clearer 'Menu' button. This will provide a more streamlined and intuitive experience when accessing the portal on a mobile device.

## Smarter Levy Discounts

To make the levy information clearer, we're making a change to how discounts are displayed. With this release, owners will only see discount fields on levies if a discount is applicable to that specific levy. This means a cleaner, less cluttered view, showing only the information that's relevant.

## Meetings

1. **Unarchive a previously archived template** – When viewing any archived Items (motions, agenda items), Email templates or Meeting templates under *PIQ+>Libraries>Meetings library*, you'll now see a new action menu ⋮ for each archived template in the list which contains the option to 'unarchive'. Unarchiving the template will restore it and you can use and edit it as required.

2. **New meeting filter for Manager** – When viewing the Meetings page, there's a new filter for 'Manager' that'll allow you to search and filter meetings by manager.

   If you are viewing the Meetings page as a manager ('Manager' checkbox enabled on your user card), then this filter will be defaulted to you. If you are not a manager, this filter will not be defaulted and you'll see meetings for all managers.

   **Note**: For the Manager filter to work properly, please make sure the manager for your active buildings is linked to a current active user.

3. **New motion resolution types** – There are two new resolution types for a motion called 'Accessibility infrastructure resolution' and 'Sustainability infrastructure resolution'.
   - These are now available in the global list of resolution types but are specific to NSW Legislation.
   - When capturing votes for a motion of *either of these resolution types* in a general meeting, valid votes will be captured for financial voters only.
   - When capturing votes for a *sustainability infrastructure resolution*, poll voting is enabled by default (cannot be turned off) as votes must legally be counted using lot entitlements.

4. **New merge fields for financial data and levy instalments** – You can now use merge fields in your motions, notices and minutes documents to auto-populate budget and levy instalment details.

   The merge fields will display consolidated amounts across all schedules in the building (sums up the budget values across each schedule and presents it as one total amount). There is a future improvement planned to allow the selection of a single schedule at a motion level for the population of data in these merge fields.

   The data that is populated in these merge fields will also be determined by the financial year you select for the meeting. Refer to '*Item 5 - Specify a financial year for a meeting'* below for more detail on the financial year.

   New fields available in merge field library under 'Financial' group
   - **Fields:** Proposed levy instalment due dates, Proposed total expenditure (Admin, Sinking and combined total), Proposed total income (Admin, Sinking and combined total), Proposed total budget (Admin, Sinking and combined total), Current total budget (Admin, Sinking and combined total)
   - **Dates** are formatted as dd/mm/yyyy. **Currency** amounts are formatted as $0.00.
   - Total amounts will include a **GST status** label depending on the GST registered status of the building.
     - *GST registered buildings*: the proposed income and expenditure fields will show as '$x.xx excluding GST'. The proposed budget fields will show as '$x.xx including GST'.
     - *Non-GST registered buildings*: all fields will show without a GST label e.g. '$x.xx'

   New dynamic merge field "Levy instalments table" under 'Financial' group
   - This creates a customisable table of levy instalments for the financial year. The table will automatically populate the required number of rows based on the number of instalments.
   - The table provides merge fields for both Admin Fund and Sinking Fund amounts. You can adjust the content of the table and remove columns as required for your motion e.g. Admin Fund only, Sinking Fund only, both.
   - The default table that is populated when you first insert the merge field in the document includes both Admin and Sinking merge fields.
   - You can easily remove any unnecessary columns, format and amend the column header names as needed.
   - To customise the content within the table, you can use the following merge fields:

- Status, Period, Due date, Per lot entitlement (Admin, Sinking and combined total) and Amount per instalment (Admin, Sinking and combined total).

See below for detailed screenshots and examples on the new merge fields.

**Important note**: There may be minor rounding discrepancies in the amounts displayed for 'per lot entitlement' and 'per instalment' in the "*Levy Instalments table*" merge field. It's recommended that you include rounding disclaimers in your documents and attach the budget report for a detailed levy breakdown.

5. **Specify a financial year for a meeting** – You can now specify the financial year your meeting relates to. This will be used for the population of data in financial and levy instalment merge fields in meeting notices and minutes. Refer to '*Item 4 - New merge fields for financial data and levy instalments'* above for more detail.

   *Why is this important?* Selecting a financial year for your meeting will ensure the financial and budget data used in your notice and minutes remains consistent during the lifecycle of your meeting; even when you send the minutes after accepting the budget, which rolls the levy year, or you roll the building's financial year, which changes the date period.

   - The new 'Financial year' dropdown field on the meeting details page will display a list of current and past financial years for the selected building.
   - When creating a new meeting, it will default to the building's current financial year.
   - For existing meetings, the financial year field will be blank to preserve any budget data you've already entered in your documents.
   - When editing an existing meeting that is dated in the past, you will be prompted to select a financial year before saving. When editing an existing meeting that is dated today or in the future, we'll default it to the current financial year when saving.

   See below for a screenshot.

6. **Improvements to attendance merge fields in minutes -** When there are no 'Other Attendees' or 'Apologies' for a meeting, you'll now see the text "Nil" instead of an empty table in the meeting minutes.

7. **In-browser editor updated to latest version** – The in-browser editor used for document creation and editing, and text field formatting, has been updated to the latest version.

   There are no changes to features available and the following issues have been resolved:
   - table and cell border colours are now correctly applied
   - copying and pasting images within a document now retains the image size
   - differences in on-screen preview vs PDF, especially when using left aligned tables in documents. You can read more about this below.

   Differences in on-screen preview vs PDF document
   - The page break and spacing differences between what you see in the editor vs PDF happens because of how a table was added into the document. If it was copied from Word or an older editor, it might have brought in hidden spaces or paragraphs. These spaces only show up in the PDF when the table is stretched to fill the entire page.
   - Spacing differences are also being caused when adding a left-aligned table and then moving inline text below the table with extra paragraph spaces, which can add hidden spaces and affects page breaks in the PDF document.
   - These issues have been resolved for new tables created in documents after this release.
   - Existing left aligned tables and meeting documents (created before this release) may still have some issues. You can try removing and re-pasting content to resolve issues or changing your left aligned tables to be centre aligned instead.

   For more tips and troubleshooting on the PIQ+ editor, you can view our detailed PIQ+ Tips and Troubleshooting guide.

### Item 1 – Certificates - Attach balance sheet and lot ledger reports

When generating an information certificate from the lot card, you'll see a new ***Reports and Registers*** accordion. From here, you can select any of the existing register reports and select any of the new options for a balance sheet report, owner ledger report and owner transaction summary.

The reports you select here, will be automatically generated and included in the published certificate document. The order of attachments in the generated document is (1) Certificate, (2) Financial reports, (3) Register reports, and (4) Adhoc attachments.

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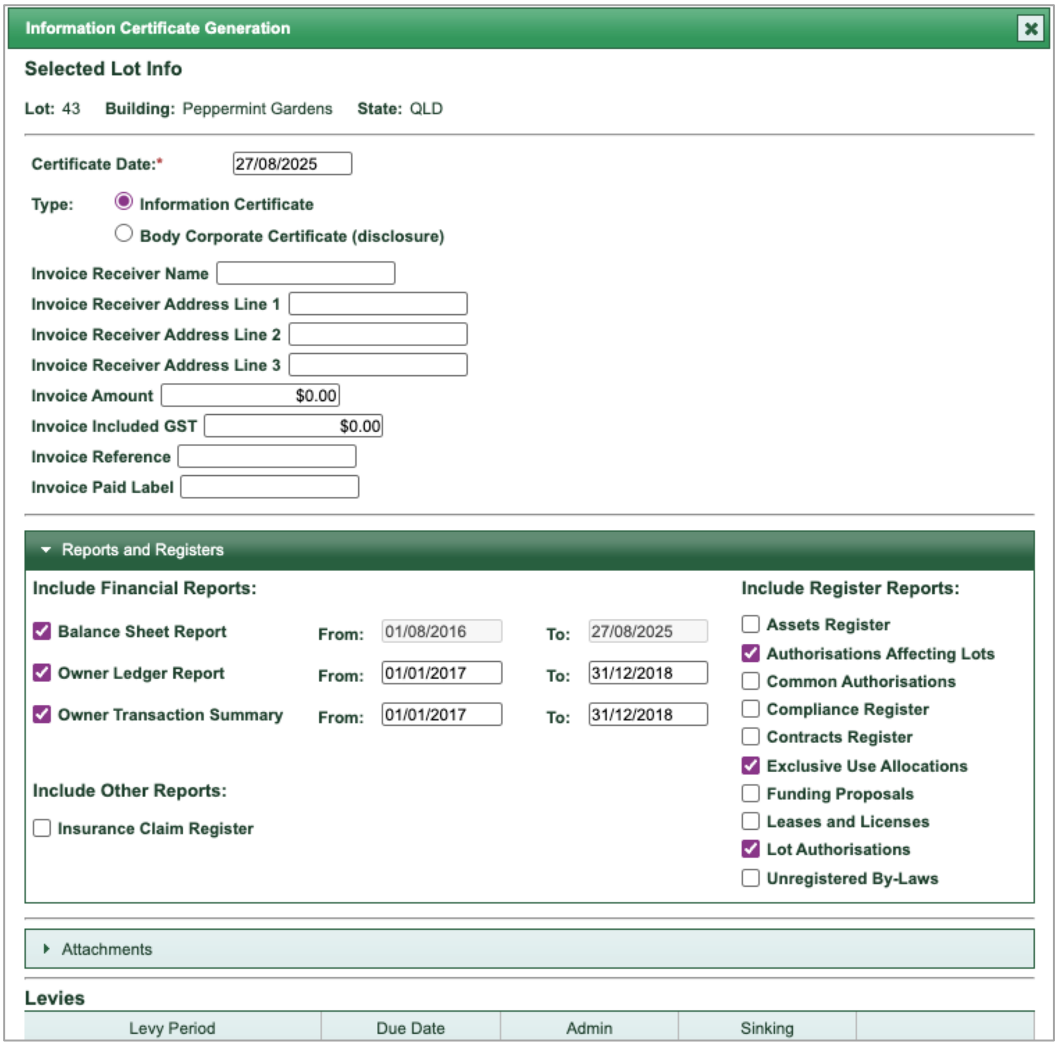
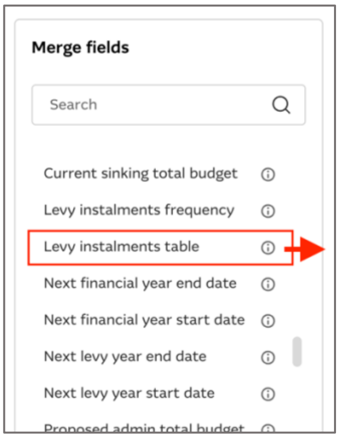
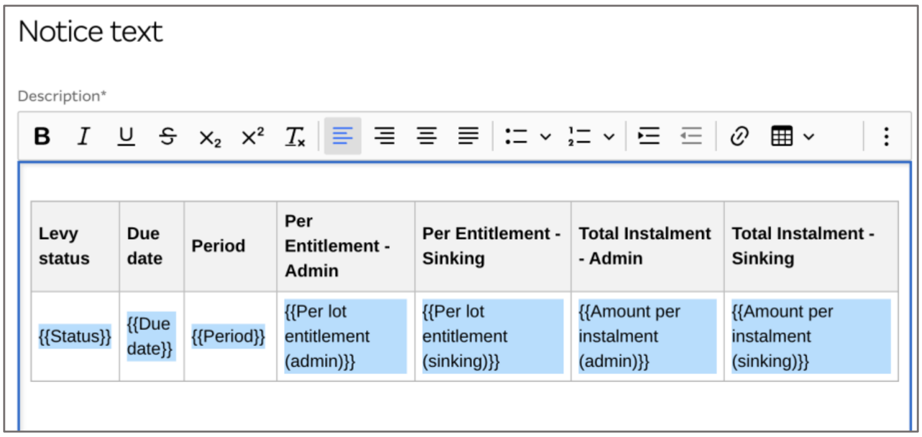
- Owner ledger report: This will generate a ledger report for the relevant lot. The *From* date defaults to levy year start date and *To* date defaults to levy year start date + 1 year. These date fields are editable and mandatory.
- Owner transaction summary: This will generate a transaction summary for the relevant lot. The *From* date defaults to levy year start date and *To* date defaults to levy year start date + 1 year. These date fields are editable and mandatory.



## Item 4 – Meetings - New merge fields for financial data and levy instalments

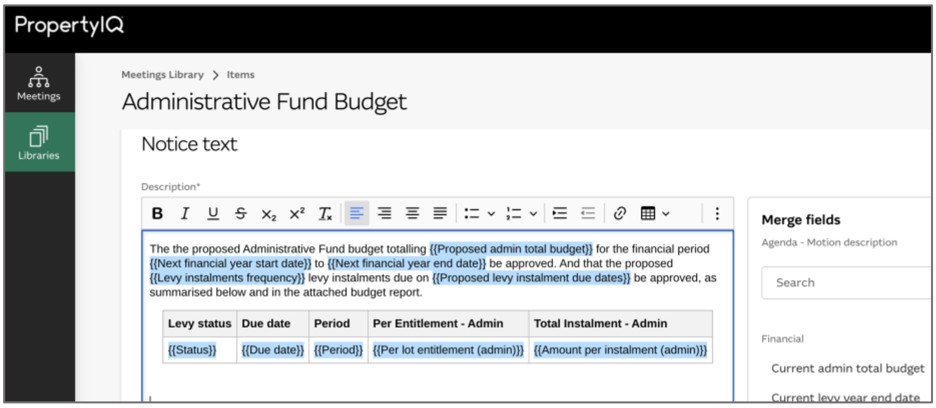
Example of default table that's inserted when using '***Levy instalments table***' merge field.



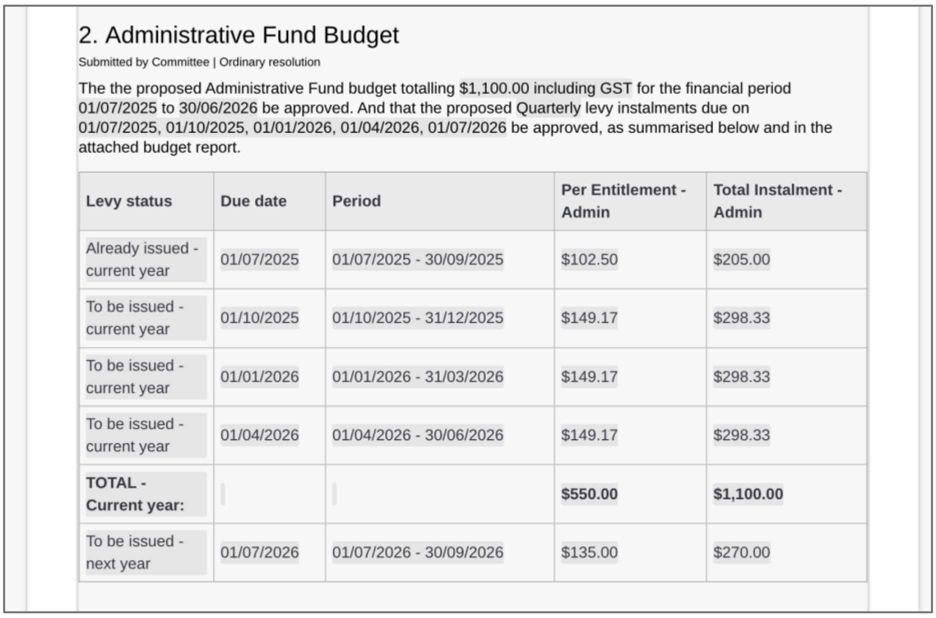




Example of Administrative Fund Budget in Notice (using a building with quarterly levies, 1 pre-issue levy)

Template - Motion description for Notice - **Placeholder merge fields and table**




In a Meeting - Notice document with populated data in the motion – **On-screen editor preview**


2. Administrative Fund Budget

Submitted by Committee | Ordinary resolution

The the proposed Administrative Fund budget totalling $1,100.00 including GST for the financial period 01/07/2025 to 30/06/2026 be approved. And that the proposed Quarterly levy instalments due on 01/07/2025, 01/10/2025, 01/01/2026, 01/04/2026, 01/07/2026 be approved, as summarised below and in the attached budget report.

| Levy status | Due date | Period | Per Entitlement - Admin | Total Instalment - Admin |
|---|---|---|---|---|
| Already issued - current year | 01/07/2025 | 01/07/2025 - 30/09/2025 | $102.50 | $205.00 |
| To be issued - current year | 01/10/2025 | 01/10/2025 - 31/12/2025 | $149.17 | $298.33 |
| To be issued - current year | 01/01/2026 | 01/01/2026 - 31/03/2026 | $149.17 | $298.33 |
| To be issued - current year | 01/04/2026 | 01/04/2026 - 30/06/2026 | $149.17 | $298.33 |
| **TOTAL - Current year:** | | | **$550.00** | **$1,100.00** |
| To be issued - next year | 01/07/2026 | 01/07/2026 - 30/09/2026 | $135.00 | $270.00 |

In a Meeting - Notice document with populated data in the motion – **PDF preview**

## 2. Administrative Fund Budget

Submitted by Committee | Ordinary resolution

The the proposed Administrative Fund budget totalling $1,100.00 including GST for the financial period 01/07/2025 to 30/06/2026 be approved. And that the proposed Quarterly levy instalments due on 01/07/2025, 01/10/2025, 01/01/2026, 01/04/2026, 01/07/2026 be approved, as summarised below and in the attached budget report.

| Levy status | Due date | Period | Per Entitlement - Admin | Total Instalment - Admin |
|---|---|---|---|---|
| Already issued - current year | 01/07/2025 | 01/07/2025 - 30/09/2025 | $102.50 | $205.00 |
| To be issued - current year | 01/10/2025 | 01/10/2025 - 31/12/2025 | $149.17 | $298.33 |
| To be issued - current year | 01/01/2026 | 01/01/2026 - 31/03/2026 | $149.17 | $298.33 |
| To be issued - current year | 01/04/2026 | 01/04/2026 - 30/06/2026 | $149.17 | $298.33 |
| **TOTAL - Current year:** | | | **$550.00** | **$1,100.00** |
| To be issued - next year | 01/07/2026 | 01/07/2026 - 30/09/2026 | $135.00 | $270.00 |

## Item 5 – Meetings - Select the related financial year for a meeting