PropertyIQ

Release notes December 2019

Version 188.0 -189.3

TABLE OF CONTENTS

Table of Contents 1

Summary 2

- Buildings 2
- Reporting 3
- Lots 3
- Settings 3
- Security 4
- Access Register 4
- Utilities 4
- General 5
- Emailing 5

Detailed Screenshots 6

- Item 1 - Nominee for a committee member can be recorded 6
- Item 2 – Building Export includes committee details 8
- Item 3 - Mail merge when recipient is the Property Manager 9
- Item 6 - Mail merge from lot owners screen – remove duplicate recipients 9
- Item 10 – Emailing - New mail server setting - *max local email recipients* 12
- Item 11 – New permission to download supplier files 13

SUMMARY

BUILDINGS

1. **Building Card>Info Tab>Committee**. You can now record the lot owner that nominated a committee member on the committee member card. This is a requirement in NSW but is available for buildings in all states. See detailed screenshot
2. **Building screen export – new option to export committee member details**. You can now export committee details for multiple buildings to excel when processing a building data export. There is a new option – committee member data. There's also an option to include resigned committee members in the export. Committee member data is exported in a in it's own.csv file. If you are also exporting building data, two files are generated.

   Data is exported in this order – strata plan number>committee member status>committee member name

   The following information is included in the export

   - Strata Plan
   - Building Name
   - Building Address 1
   - Building Address 2
   - Building Suburb
   - Building State
   - Building PCode
   - Manager
   - Folio
   - Committee Name
   - Salutation
   - Position
   - Lot No (if null, should be blank)
   - Schedule
   - Nominator (lot No. & owner name of nominating lot if null, should be blank)
   - Status (Appointed/Active/Resigned)
   - Synced to Lot (Y or N)
   - Appointed Date
   - Resignation Date
   - Rep (Y or N)
   - Sub Rep (Y or N)
   - Ext Approver (Y or N)
   - Fin Reports Recipient (Y or N)
   - Work Order Recipient (Y or N)
   - Ins Claim Recipient (Y or N)
   - Address 1
   - Address 2
   - Address 3
   - Suburb
   - State
   - Post Code
   - Home
   - Work
   - Fax
   - Mobile
   - Email
   - Delivery
   - Email, (if email is selected for delivery preferences)
   - Post (if post is selected for delivery preferences)
   - Email & Post (if both are selected for delivery preferences)
   - Notes

   See detailed screenshot

REPORTING

3. **Committee Report**. The nominator of a committee member (item 1 above) can now be included when printing a committee report.

LOTS

4. **Lot Owner screen>mail merge.** When you process a mail merge from the lot owners screen and the recipient is the property manager, the merge field {{Recipient_Block_1}} now merges using the field *Company Name*, rather than the field *Agent Name*, so you can proceed with the mail merge if there is no data in the *Agent Name* field of the property manager card.
5. **Lot owner screen>mail merge.** When you process a mail merge from the lot owners screen and the *general correspondence* recipient is the agent/property manager, the mail merge will now show the owners name, then c/- agent (property manager's) name and address. For example:

   The merge fields behave as follows:

   {{recipient_block_1}} shows the owners name
   {{recipient_block_2}} shows c/- the agents company name
   {{recipient _block_3 and {{recipient_block_4}} {{recipient_block 5}} show the agent address lines including suburb, state and postcode. For example:

   Jane Doe
   C/ Best Property Agents
   345 Church Street
   ADELAIDE SA 5000

6. **Lot owner screen>mail merge – option to remove duplicate recipients.** To reduce mailing and or Bing costs costs - there's now a new option – *Remove duplicate Recipients* when processing a bulk mail merge. If you select this option, the letter will only be sent to each unique postal and email address. For example, if two lots share the same email or postal address only one letter will be sent to each post or email address. If the same email or address is entered for lots across multiple buildings, the *first* lot will receive the correspondence (the order is strata plan>lot number). However, a file copy of the merged letter will still be saved in the Lot>Documents for all lots for and show a note that the letter wasn't delivered. See detailed screenshot
7. **Lot owner screen>mail merge.** Improvements have been made to the process to cater for lots in community title plans or deposited plans, when sending letters to the *Occupant* option to ensure the correct address is shown when the lot is not owner occupied and no unit number is recorded on the lot card. This ensures that lots in community title plans or deposited plans which have their own stand-alone address and no unit number, show the correct address. If there is no unit number in the lot card, only the lot's street address will merge. The address now looks like this example:

   The resident
   4 Church Street
   EMERALD QLD 4720

8. **Info certificates** – an error that was occurring when generating info certificates and selecting to include registers, has now been fixed.

SETTINGS

9. Improvement have been made to ensure that when users are updating settings at the same time, the change made by each user is saved.
10. **Settings>Mail Server Settings>Outgoing**. Improvements have been made when sending bulk emails from the lots owners screen, the committee card or suppliers screen.

    There's now a new option in your outgoing emails settings – *Max Local Email Recipients*. The maximum number of recipients will be set to 500 by default but you can enter another number.

    Duplicate email addresses will now be removed as part of the emailing process.

If you select to send emails to more recipients than are allowed by your new setting, duplicate draft email(s) are created so you can email everyone you need to. See detailed screenshot.

SECURITY

11. **Roles – new permission to download payment files.** There's now a new permission to allow users to download payment files in the Supplier Payments permissions called *Download Files.* This allows an administrator to control which users you want to be able to conduct this process. The permission sits in the supplier payments area. Administrators have this new permission by default, but you will need to add it to any other roles that need this function. See detailed screenshot

ACCESS REGISTER

12. **For users of utility debtor invoicing**. Improvements have been made to the processes when selling an access register item to a utility debtor. You can now only select utility debtors that are related to the lot the access register item is for.

UTILITIES

13. **Audit trail.** The audit trail now records processes conducted by a user related to payment files. The information recorded is
    - Who created a payment file and when
    - Who uploaded a payment file to active banking and when
    - Who edited a payment file and when – this cancels an existing file and creates a new one
    - Who downloaded a payment file and when

14. **Audit trail.** The audit trail now records processes conducted by a super admin (support) user when they credify a ledger as part of the support process. The credify ledger process rewrites all receipts for the lot as credit receipts, all associated levy allocations are cleaned and all transfers to and from credit are deleted. Although this process does not affect the lot's closing balance, it does delete transactions and create new ones. This change to audit trail logging ensures there is a snapshot of how the data looked prior to the credify process being run.
15. **Audit trail.** Payments processes. The audit trail now records more information about payments. The information recorded is:

    The user and time a cheque was cancelled cancelled

    The audit trail now shows the creation of a payment and concurrent update of the balance, last paid date and last amount paid on a supplier card. These changes now show in the audit trail as well as in the log of changes on the supplier card..

16. **Audit trail**. *From* and *To* dates filter- the *To* date now shows items created up to midnight on the date selected in the *To* field to ensure all items are captured for the date range selected.

GENERAL

17. Improvements have been made to decrease the likelihood of bank balances showing inconsistently across Property IQ. Some of the discrepancies were caused by debtor receipts and debtor transfers not updating the stored bank balances in PropertyIQ. For example, there could be differences between the stored bank balance in File>Bank Accounts>Admin/sinking balances and the calculated bank balance showing in Buildings>Financials>Bank Balances. The following debtor related process (if they affect the bank balance or the balance in either the admin or the sinking/reserve/capital works/maintenance fund) will now update both the stored bank balance *and* the calculated bank balance
    - lot invoice or credit transaction from a .txn file
    - debtor invoice or credit transaction from a .txn file
    - to/from credit transfer
    - debtor to/from credit transfer
    - manual *other* deposit

Note: This improvement has decreased the likelihood of discrepancies but there are other processes that could cause them.

EMAILING

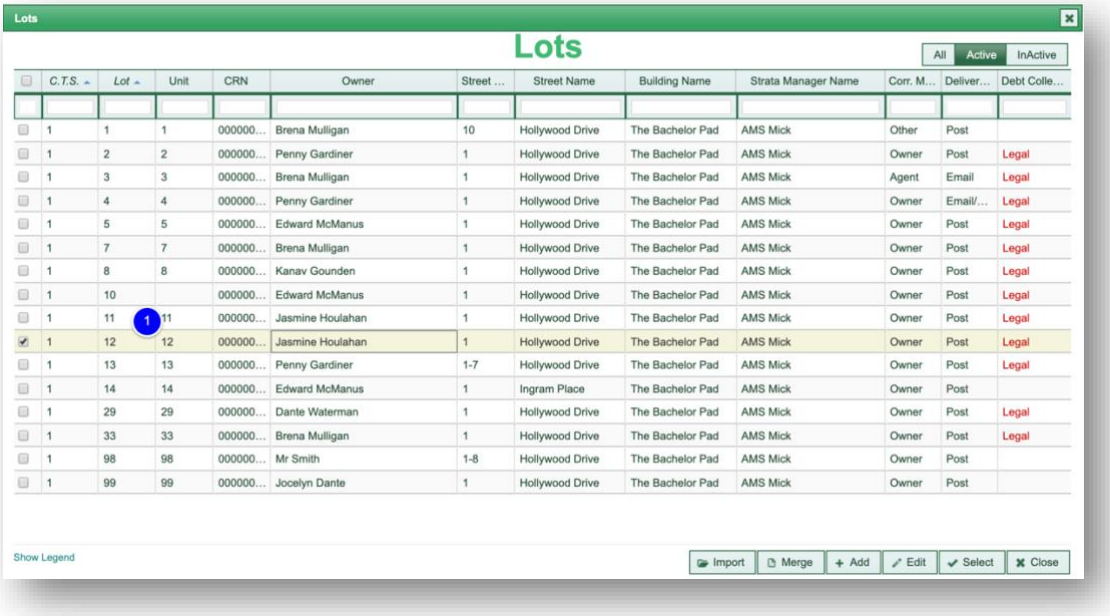
18. **Due Notices**. Previously, when sending due notices and one or more of the selected email addresses were invalid, an internal server error was occurring. This has now been fixed. If there are any *To* addresses that are invalid, they now won't be emailed and an error message will show in the sidebar on the right of your screen, but the rest of your bulk email will send successfully.

ITEM 1 - NOMINEE FOR A COMMITTEE MEMBER CAN BE RECORDED

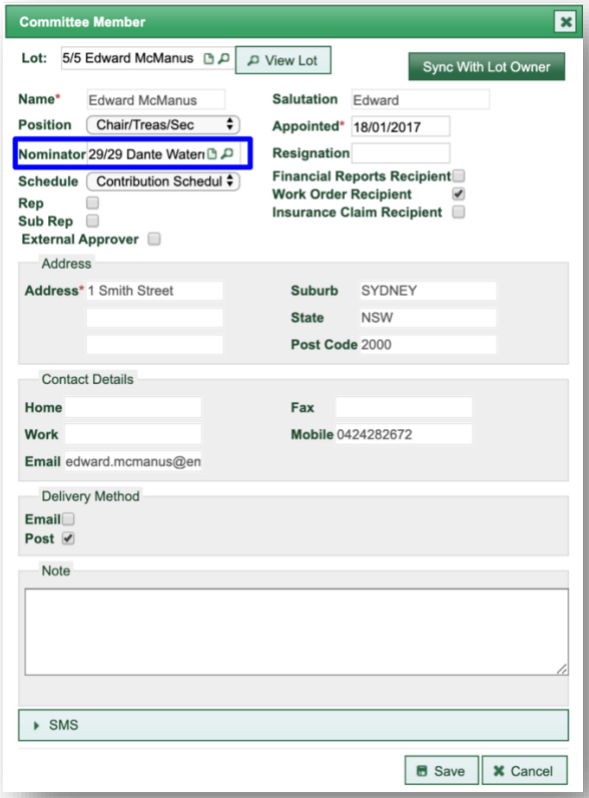
You can now record the lot owner that nominated a committee member on the committee member card. This is a requirement in NSW but is available for buildings in all states.

1. From the lot owner card use the search icon to find the lot owner that nominated the committee member.

2. Click on the lot owner and then double click to select them



The nominating lot owner now shows on the committee card.

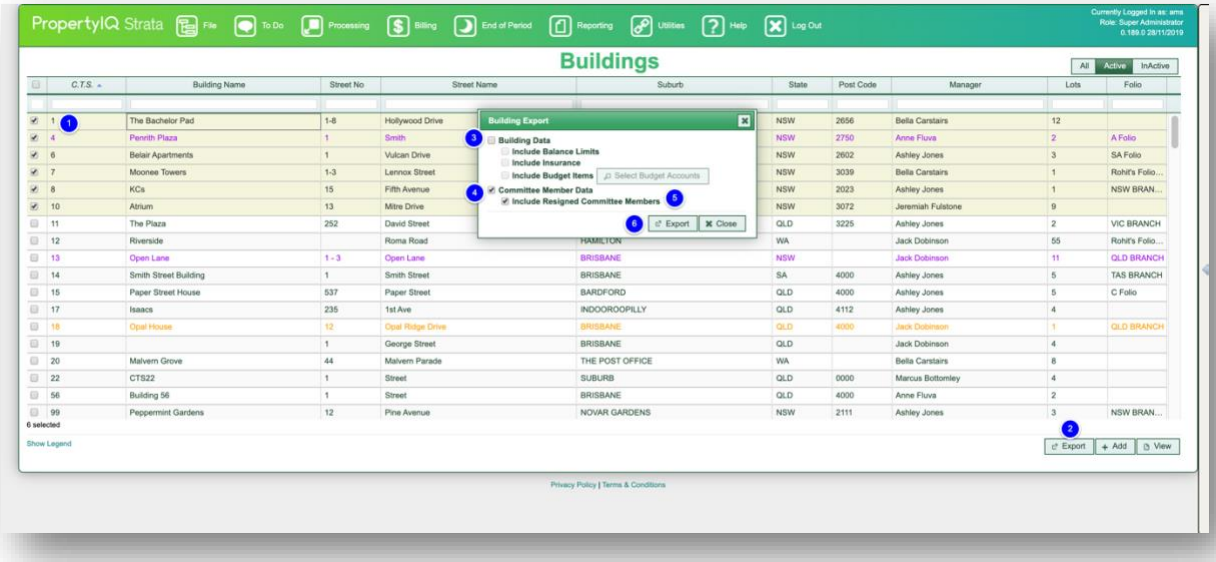


ITEM 2 – BUILDING EXPORT INCLUDES COMMITTEE DETAILS

You can now export committee details for multiple buildings to excel when processing a building data export. There is a new option – committee member data. There's also an option to include resigned committee members in the export. Committee member data is exported in a in its own.csv file. If you are also exporting building data, two files are generated.

Data is imported in this order – strata plan number>committee member status>committee member name

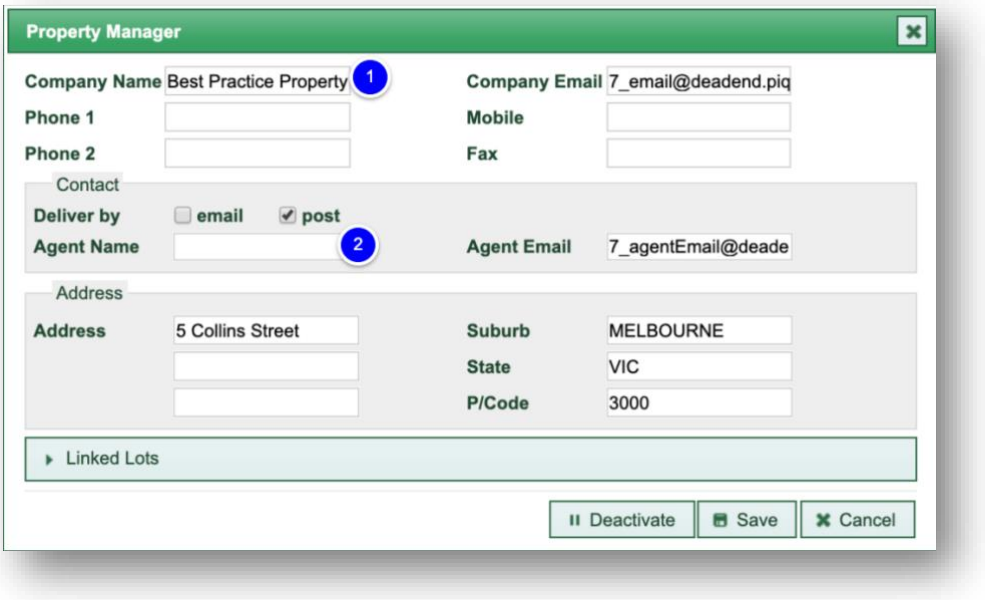
1. Select the buildings you want to export data for
2. Select here if you want to export building data
3. Select here if you want to export committee member data (if both are ticked, two separate spreadsheets will be created)
4. Select here if you want to include resigned committee member details



ITEM 3 - MAIL MERGE WHEN RECIPIENT IS THE PROPERTY MANAGER

Lot Owner screen>mail merge. When you process a mail merge from the lot owners screen and the recipient is the property manager, the merge field {{Recipient_Block_1}} now merges using the field Company Name, rather than the field Agent Name, so you can proceed with the mail merge if there is no data in the agent name field of the property manager card.

1. The mail merge field {{Recipient_Block_1}}

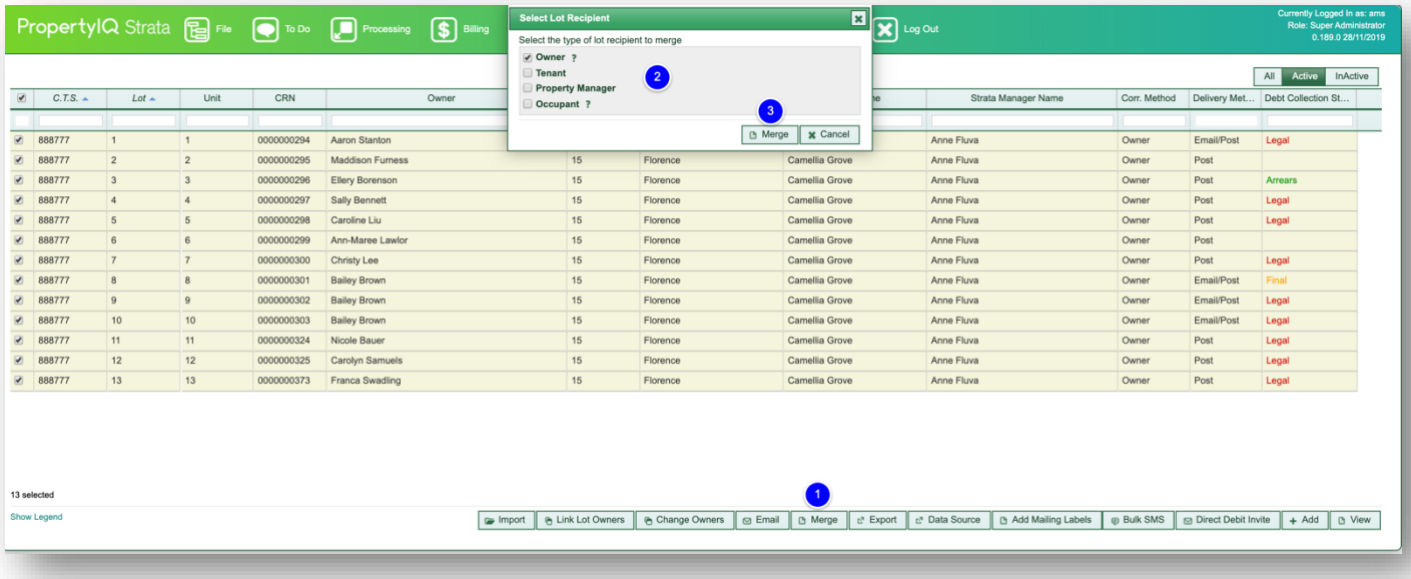


ITEM 6 - MAIL MERGE FROM LOT OWNERS SCREEN – REMOVE DUPLICATE RECIPIENTS

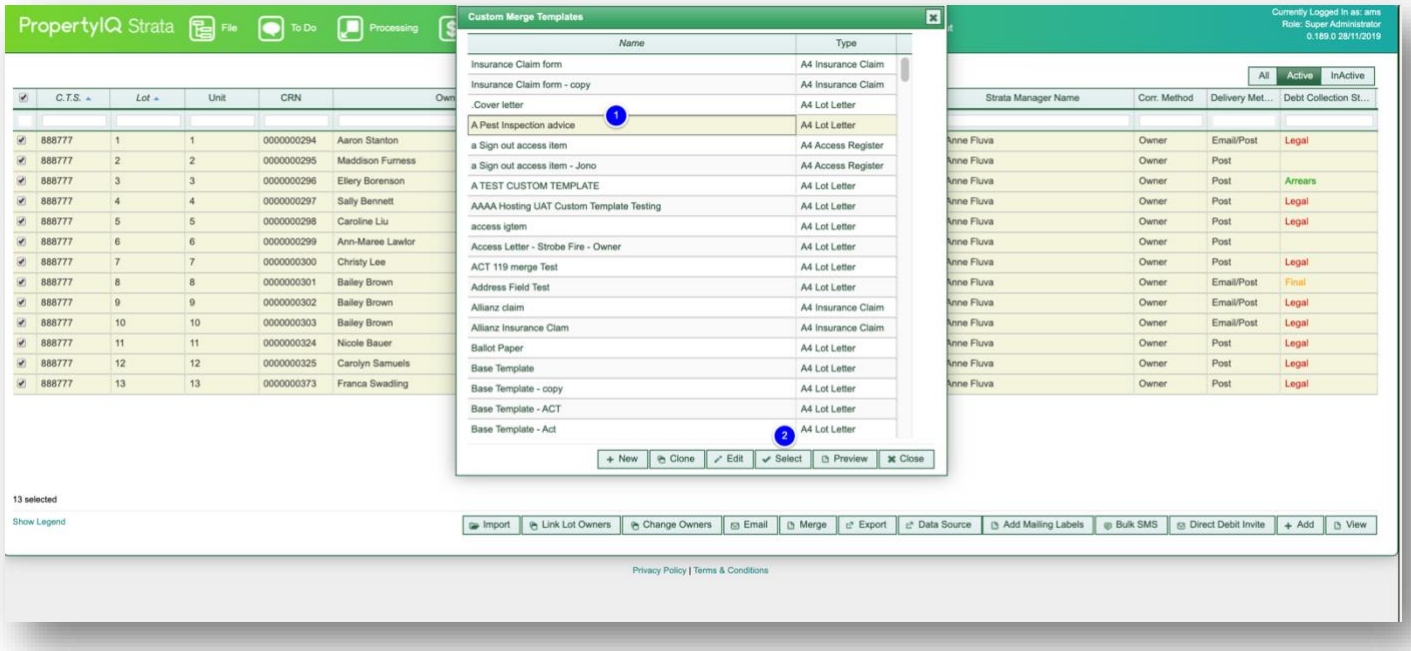
To reduce Bing and/or mailing costs - there's now a new option – *Remove duplicate Recipients* when processing a bulk mail merge. If you select this option, the letter will only be sent to each unique postal/email address. For example, if two lots share the same email or postal address only one letter will be sent to each post or email address. If the same email or address is entered for lots across multiple buildings, the *first* lot will receive the correspondence (the order is strata plan>lot number).

However, a file copy of the merged letter will still be saved in the Lot>Documents for **all** lots for record purposes and display a note that it wasn't delivered.

1. From the lot owners screen, select your recipients and select *Merge*
2. Select your recipient type
3. Select *Merge*

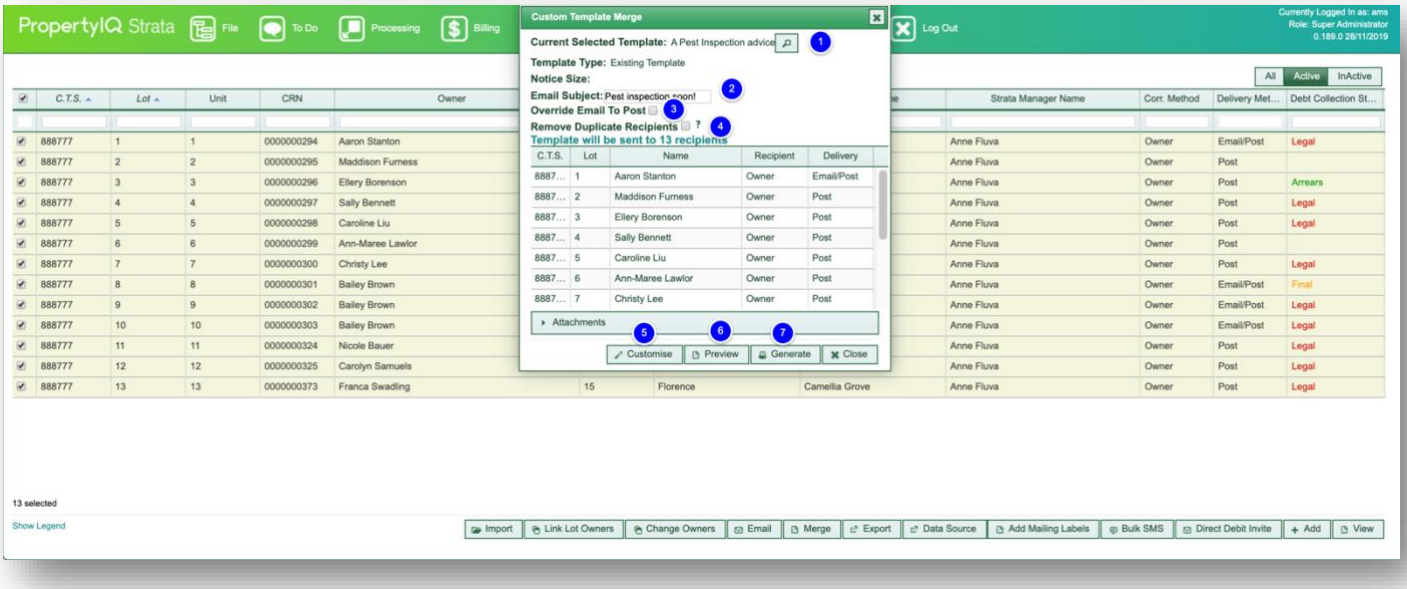


1. select the custom merge template letter by double clicking on it
2. *or* by clicking select

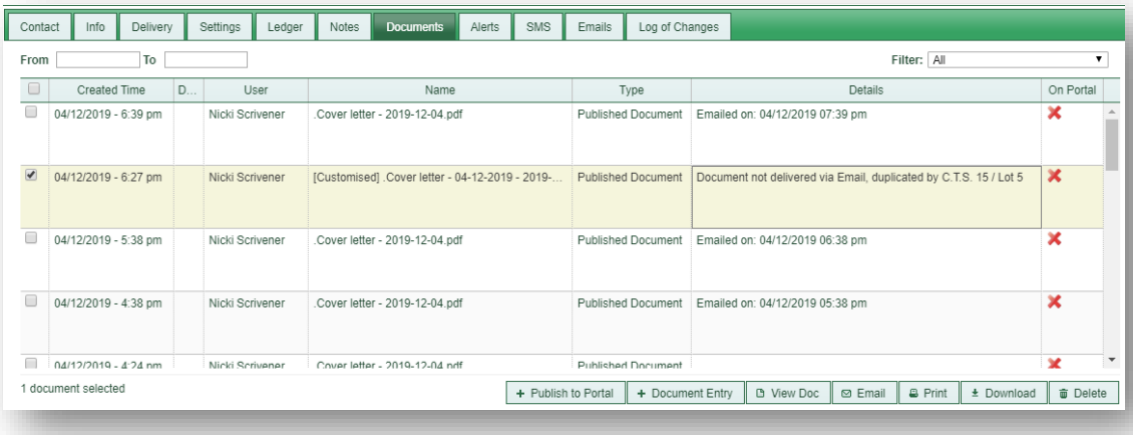


1. Your selected letter shows here
2. Enter an email subject line for those receiving via email
3. You can select to override to post here
4. Select here to remove duplicate recipients
5. Customise to alter the document for this one instance
6. *Preview* to preview the merged document

7. *Generate* to trigger sending emails to recipients receiving correspondence by email and create a PDF for those receiving by post



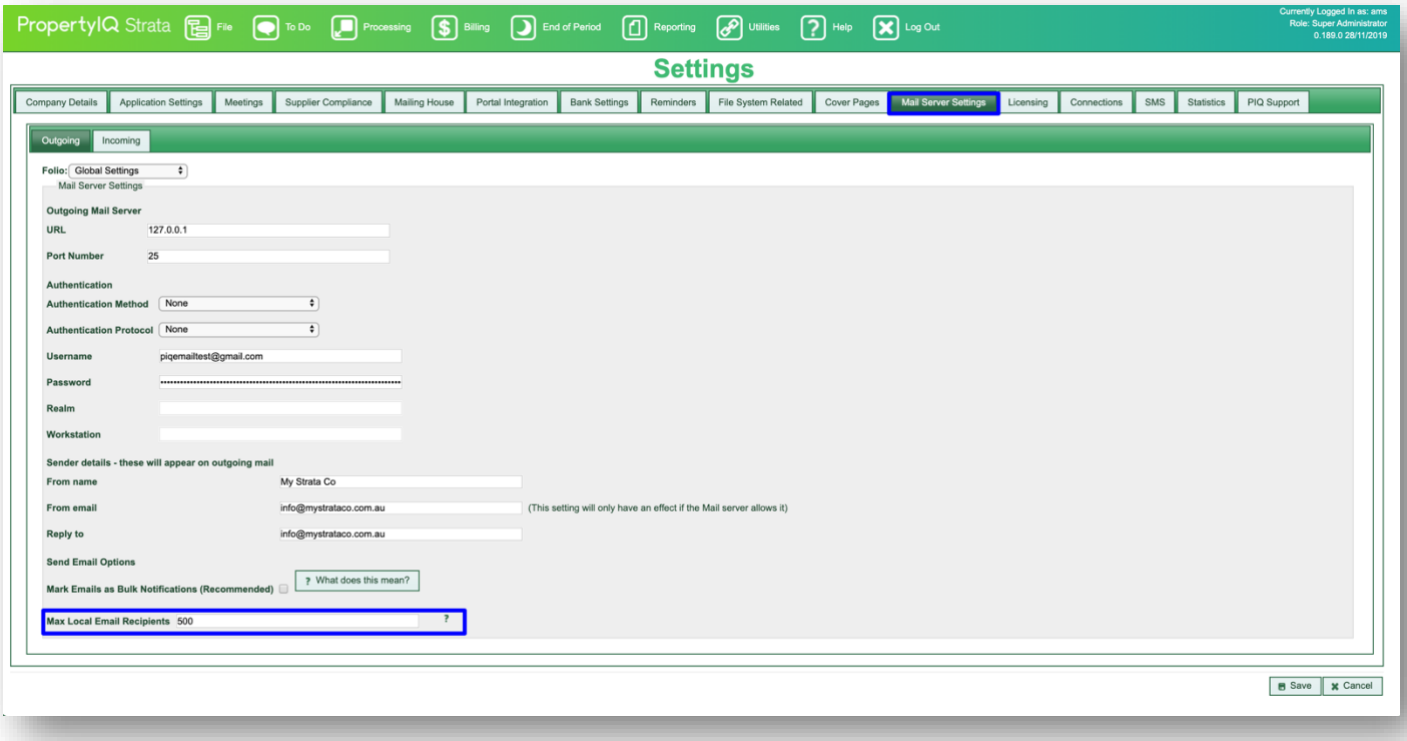
8. A copy of the generated merge template will be saved to all lots. The document saved against the duplicated recipient/s will have a note to advise it wasn't delivered as it was a duplicate.

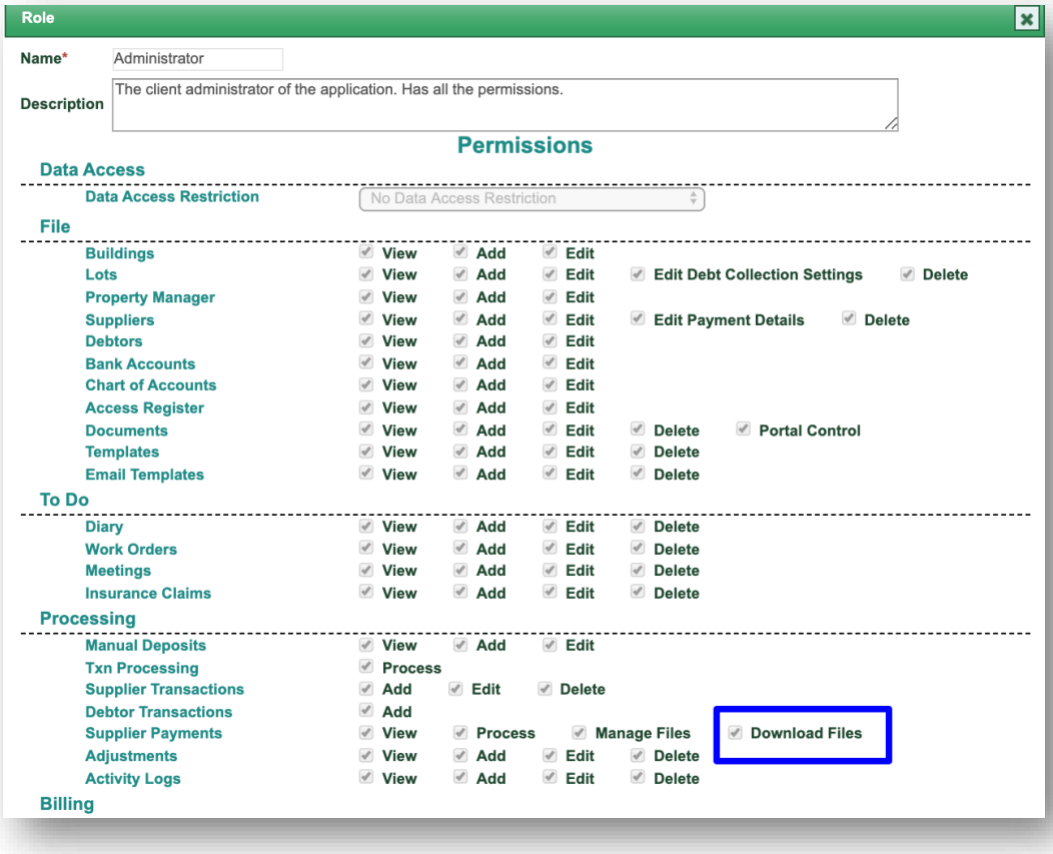


ITEM 10 – EMAILING - NEW MAIL SERVER SETTING - *MAX LOCAL EMAIL RECIPIENTS*

Improvements have been to emailing when sending bulk emails from the lots owners screen, the committee card or suppliers screen.

- The new setting is in the Settings>Mail Server Settings page in your outgoing emails settings – *Max Local Email Recipients*. You can hover your mouse over the question mark to see the explanation - *This is used to batch emails when bulk sending emails using your local email application, e.g. Outlook*
- The maximum number of recipients for a single email is 500 by default but you can enter another number.
- Duplicate email addresses will now be removed as part of the emailing process.
- If you select to send emails to more recipients than are allowed by your new setting, duplicate draft email(s) are created so you can email everyone you need to.



ITEM 11 – NEW PERMISSION TO DOWNLOAD SUPPLIER FILES

There's now a new permission to allow users to download payment files in the Supplier Payments permissions called *Download Files* This will allow and administrator to control which users you want to be able to conduct this process. The permission sits in the supplier payments area. Administrators have this new permission by default, but you will need to add it to any other roles that need this function.