PropertyIQ™

# Release notes February 2020

## Version 190.0-192.0

## TABLE OF CONTENTS


Table of Contents ..... 1

Summary ..... 2

- Buildings ..... 2
- Activity Log ..... 2
- Supplier Transactions ..... 2
- Receipting - Manual Deposits ..... 2
- Settings ..... 2
- Templates ..... 2
- Tax returns ..... 3
- Reporting ..... 3
- Internal Only ..... 3

Detailed Screenshots ..... 3

- Outgoing mail server settings ..... 3
- Variable charges ..... 4
- Sundry charges categories ..... 9
- Activity log  Categories ..... 9
- Activity Log –  - new user filter ..... 13
- Receipting - Manual deposits ..... 15
- Application Settings – new option to nominate the default chart of accounts code for Wages PAYG and Company PAYG. ..... 15

# SUMMARY

## BUILDINGS

1. **Variable charges – ability to add a category to a variable charge from the charge schedule** You can now create charge categories and allocate variable charges to them.
2. **Sundry charges – ability to add a category to a sundry charge from the building card.** You can now add categories to sundry charges on the building card

## ACTIVITY LOG

3. **Charge categories– ability to add a category to an activity charge.** You can now create charge categories and allocate variable charges to them.
4. **Actiity log screen –screen improvements.** You can now sort the screen by column by clicking on any column heading. If you want to filter to just a single building, you can simply use the search icon to find the building as the need to tick the "single building" has been removed.
5. **Activities are now assigned to a user.** Items recorded via the Activity log are now assigned to a user. When you create a new activity, it will automatically be assigned to the creator. (user you are logged in as) You can reassign the user assigned to an activity. You can also filter the activity log screen by user. Changes are recorded in the audit log.

   **Note:** These changes only affect activities created *after* you've been upgraded to this version. Activities created prior can be manually edited to include a user if they are unposted ( subject to some restrictions such as the restriction on editing items in a prior BAS period.) The ability to produce a report by user is coming soon.

## SUPPLIER TRANSACTIONS

6. **For AIM Users –** Improvements have been made to ensure that when an invoice is imported from AIM that has been automatically approved, the invoice will be given a name that the user can easily identify. Improvements have also been made to ensure that automatically approved invoices that have already been imported are renamed. This won't alter names that a user has already manually updated themselves.

## RECEIPTING - MANUAL DEPOSITS

7. ***Other* manual deposits.** When creating a manual deposit of the type *Other,* you can now add a description to each line item in the deposit so that different line items that have different details can be easily identified. When processing the manual deposits that are created by the BAS lodgement process the details of the manual bank deposit will match on the .TXN allocation screen.

## SETTINGS

8. **Outgoing mail server settings.** configuring outgoing mail server settings is now easier. You can now choose your mail server from a list – (for example, Office 365, Outlook, Google) and PropertyIQ will automatically input the default mail server settings for that provider - URL, Port Number, authentication method and authentication protocol. You now only need to enter your unique username and password and sender options. The improvements apply to both global and folio settings.
9. **Application Settings – new option to nominate the default chart of accounts code for Wages PAYG and Company PAYG.** You can now nominate default chart of account codes for PAYG, which will be used in future improvements to PAYG in the BAS workflow.

## TEMPLATES

10. The merge {{field manager_phone}} now links to the manager BH (business hours) phone number entered on their user card. Previously this was linking to the manager's AH (after hours) phone number

### TAX RETURNS

11. **Tax Paid report total** - The field *Tax Paid* has been removed from the income tax report to prevent confusion as this figure didn't include the total tax paid in some scenarios.

### REPORTING

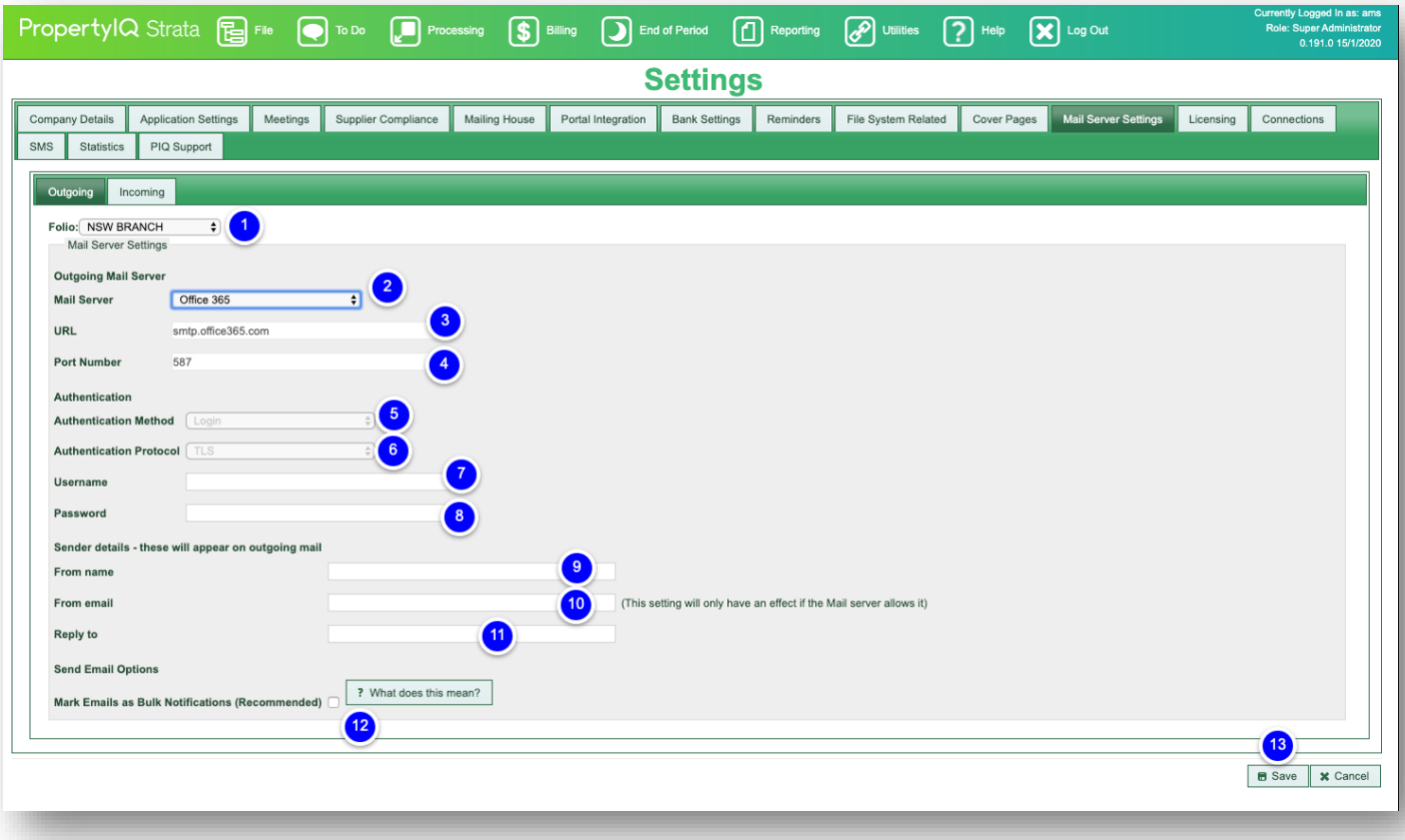
12. **Arrears report** – Improvements have been made to the lot arrears report to ensure that debtors not associated with a lot are not showing on arrears reports.

## DETAILED SCREENSHOTS

### OUTGOING MAIL SERVER SETTINGS

Configuring outgoing mail server settings is now easier. You can now choose your mail server from a list – (for example, Office 365, Outlook, Google) and PropertyIQ will automatically input the default mail server settings for that provider - URL, Port Number, authentication method and authentication protocol. You now only need to enter your unique username and password and sender options. The improvements apply to both global and folio settings.

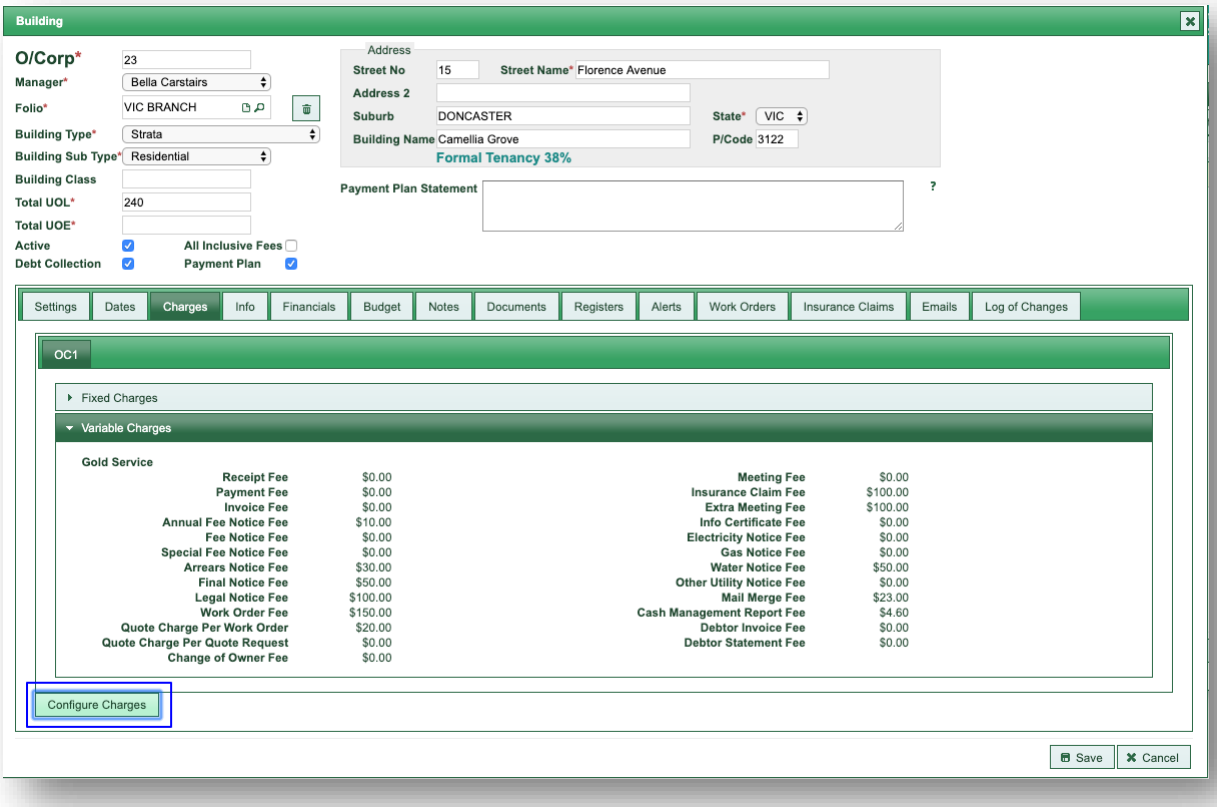
1. To configure global settings, select Global, or select a folio from the dropdownlist
2. Select the mail server from the list. The choices are:
    a. Office 365
    b. Outlook
    c. Google
    d. Other -if you choose other you will need to enter all settings manually
3. PropertyIQ will automatically input the correct URL for Office 365, Outlook or Google
4. Property will automatically input the correct Port number for Office 365, Outlook or Google
5. PropertyIQ will automatically input the correct authentication method for Offce 365, Outlook or Google
6. PropertyIQ will automatically input the correct authentication protocol for Office 365, Outlook or Google
7. You'll need to enter your account username here (email address of the account)
8. You'll need to enter your account password here (the password you use to access the email account)
9. You can enter a "From" name here – for example *My Strata Co*
10. Enter a *from* email address here – this is usually your main company email address. For example, *info@mystrataco.com.au*
11. Enter a *reply to* email address here. Note that some emails sent from PropertyIQ allow you to enter other options for replies. These are configured in Templates>Standard Email templates.
12. We recommend that you *mark emails as bulk notifications* to reduce the likelihood of your emails being marked as spam by your recipient's email server.



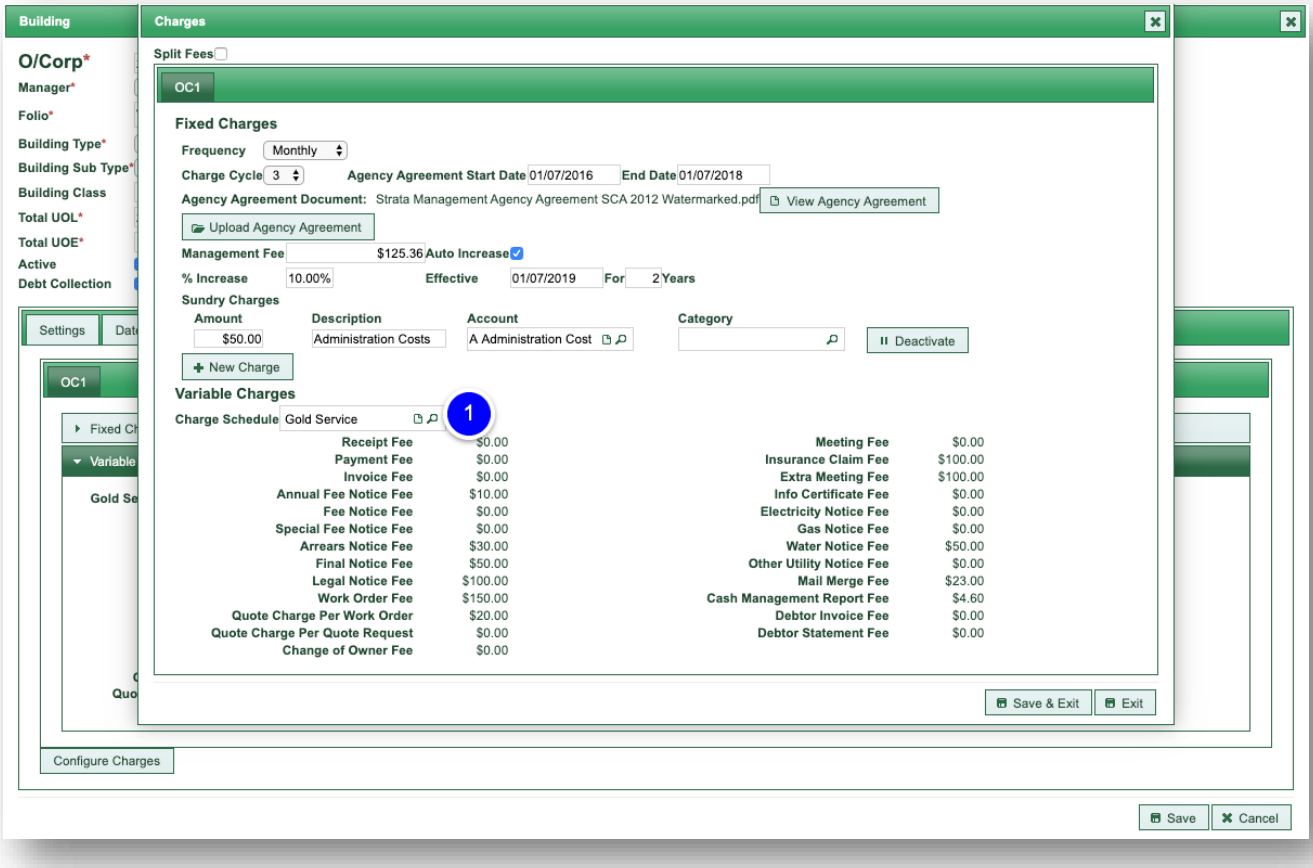

## VARIABLE CHARGES

**Ability to be able to add a category to a variable charge from the charge schedule.** You can now create charge categories and allocate variable charges to them.

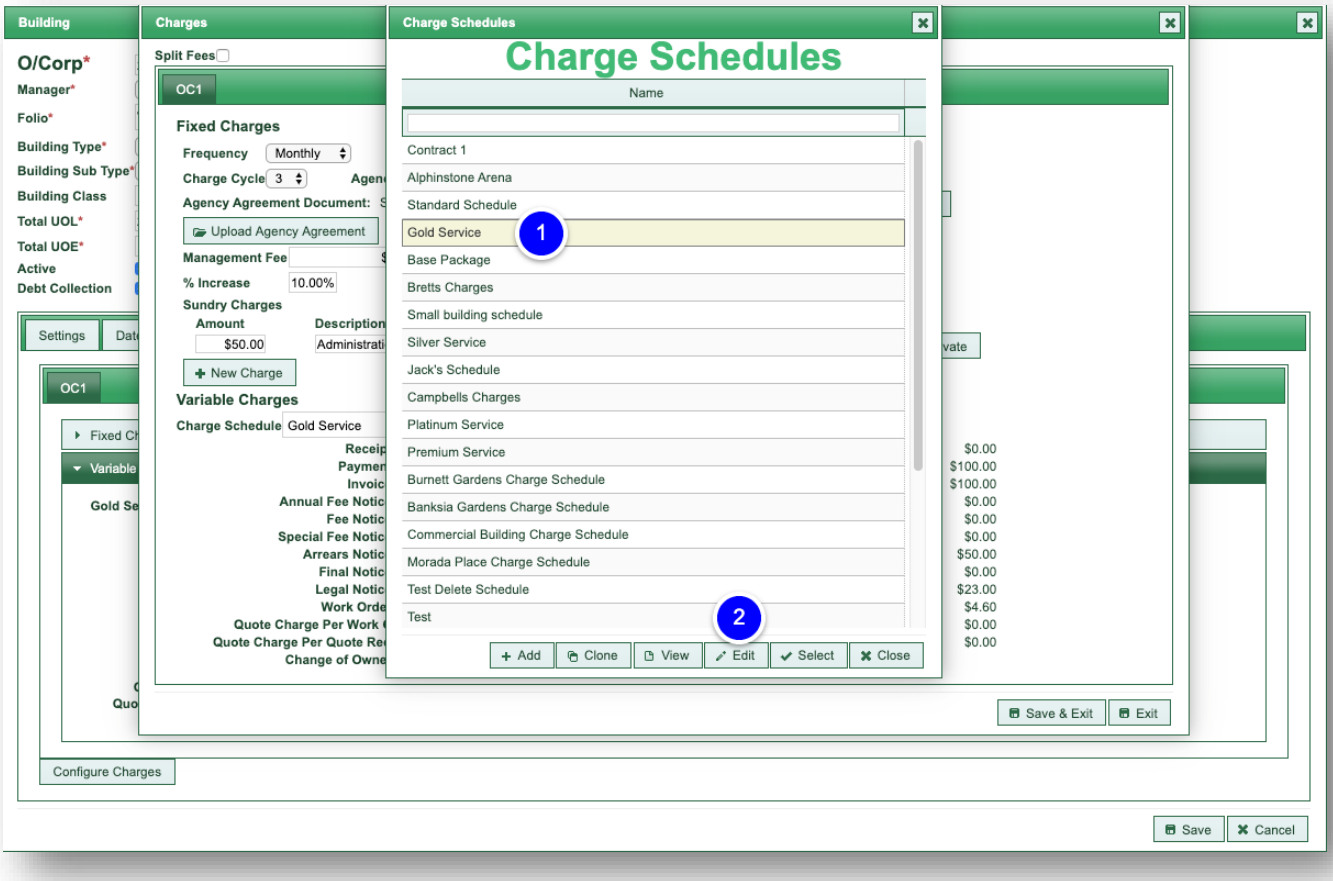
From the building card, go to the charges tab and select configure charges. (the ability to configure charges is an administrator permission by default but your company may have altered roles.)




1. Use the search icon to search for an existing charge schedule to edit.



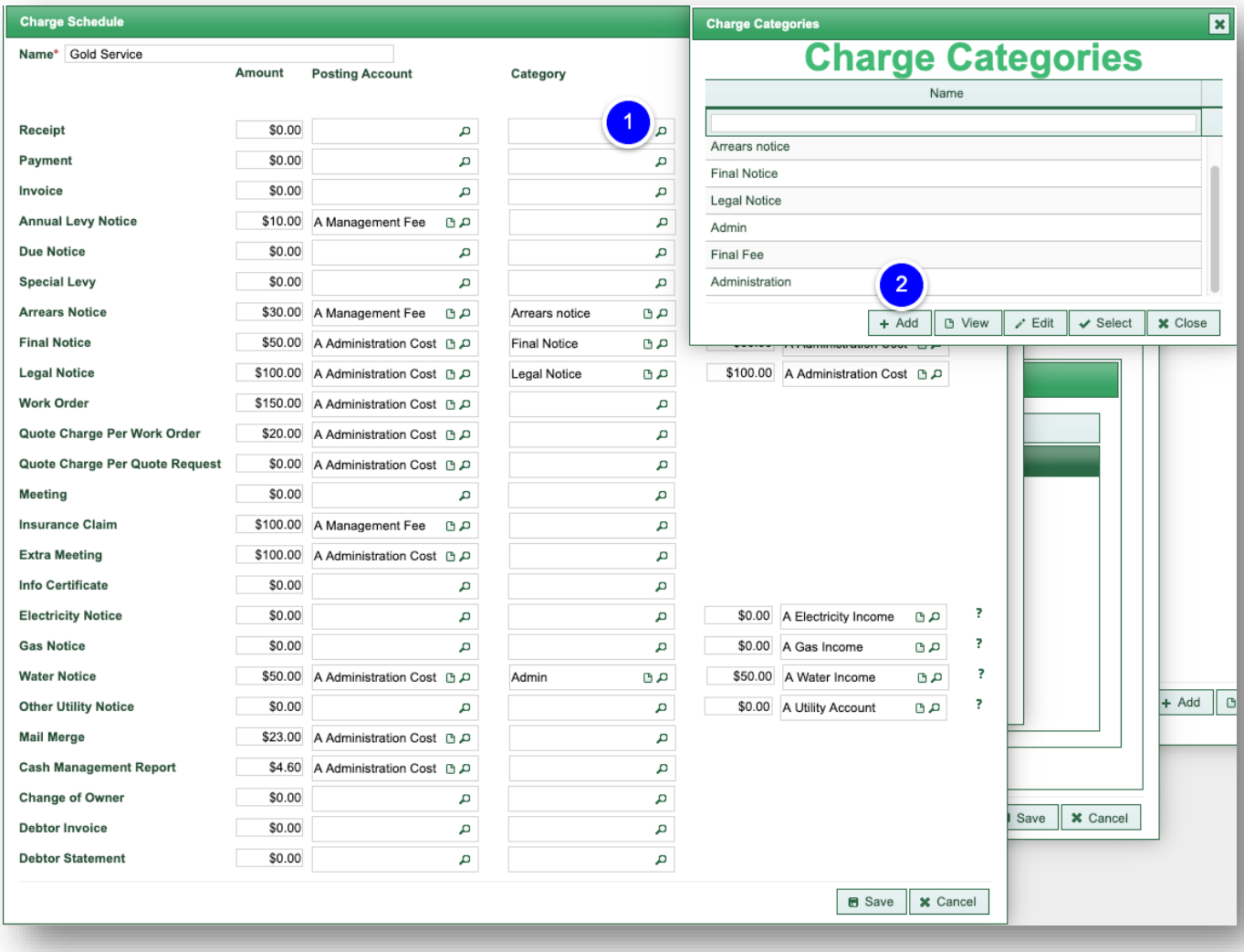
1. Select the charge schedule you want to edit
2. Select *Edit*



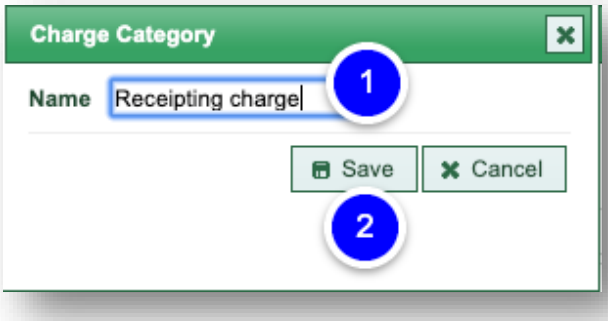
To add a new category:

Use the search icon to select open the charge categories box

Select *Add*

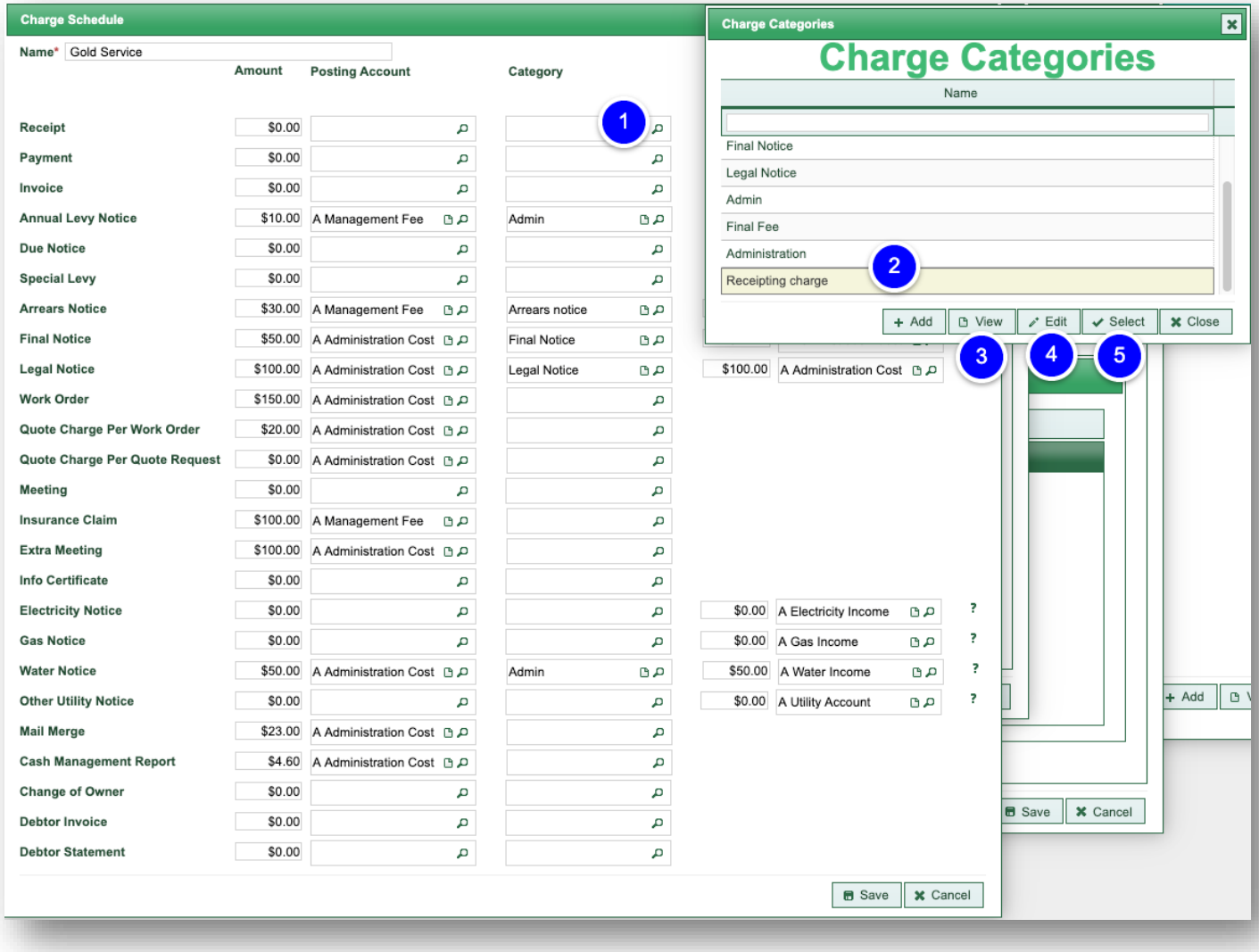



1. Enter a name for your new charge category
2. *Save*

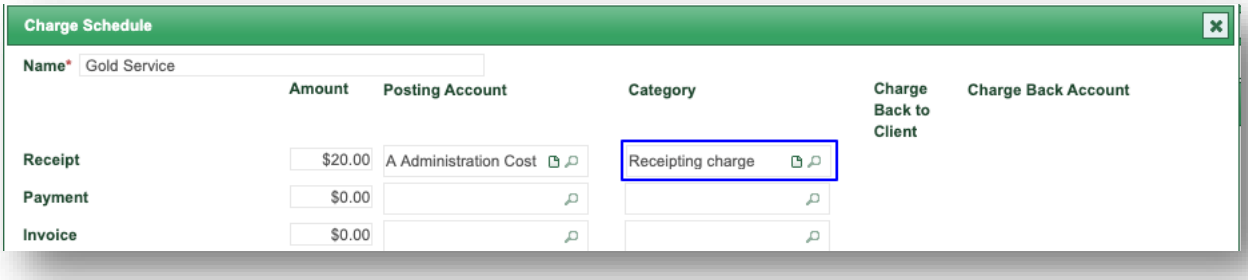


To select, view or edit an existing category

1. Use the search icon beside the charge you want to allocate a category to
2. Click on the category you want to attach
3. Select View to view the category
4. Edit to edit the category
5. Select to attach this category to the charge



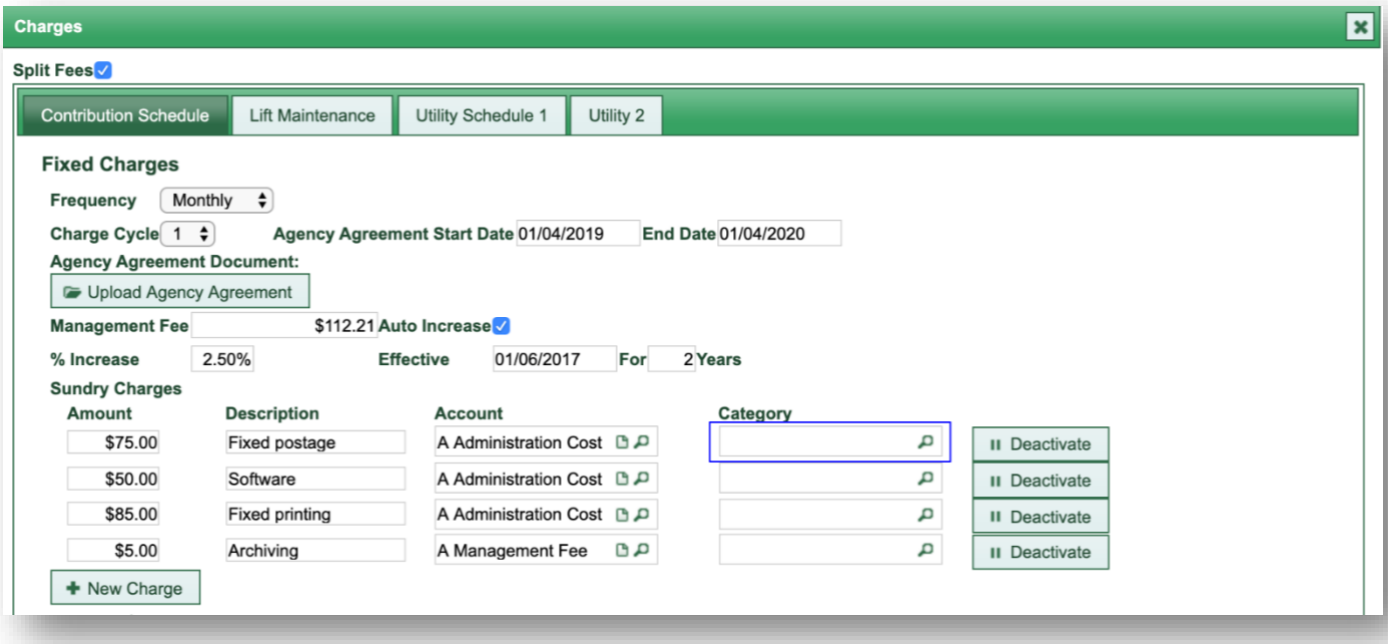

The charge category now shows beside the charge



## SUNDRY CHARGES CATEGORIES

You can now create charge categories and allocate sundry charges to them.

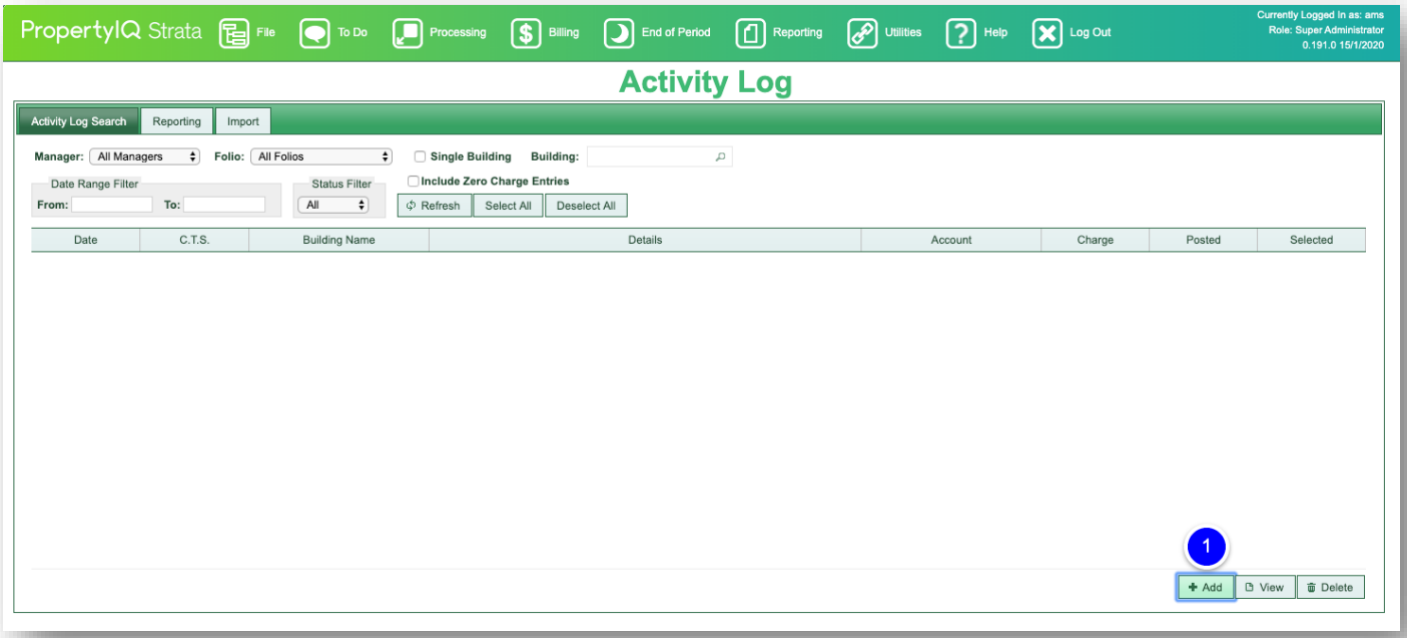
When configuring charges from the building card – sundry charges area, use the search icon to find and select an existing charge category or create a new one.



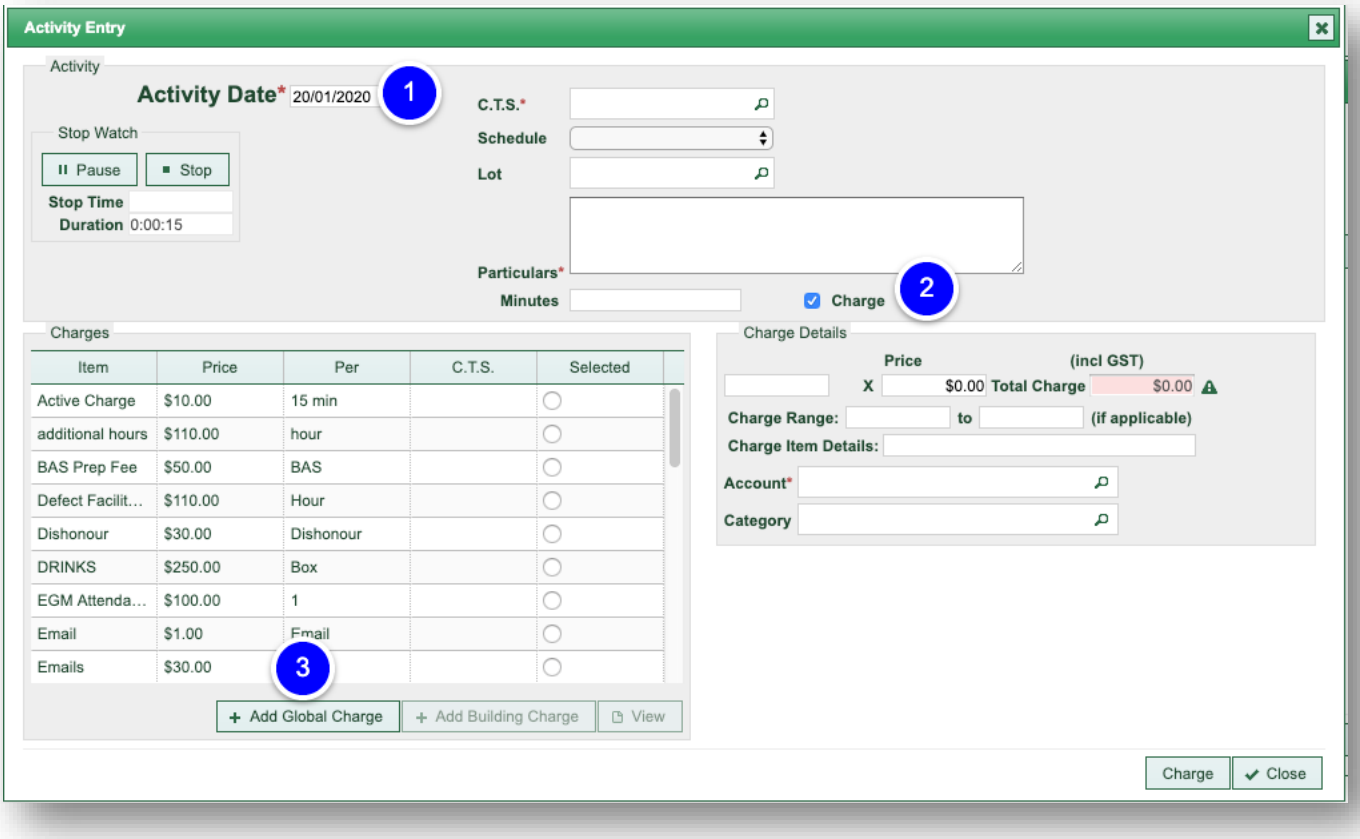

## ACTIVITY LOG CATEGORIES

You can now create charge categories and allocate variable charges to them.

To add a new charge and category, go to Processing>Activity Log and select *Add*

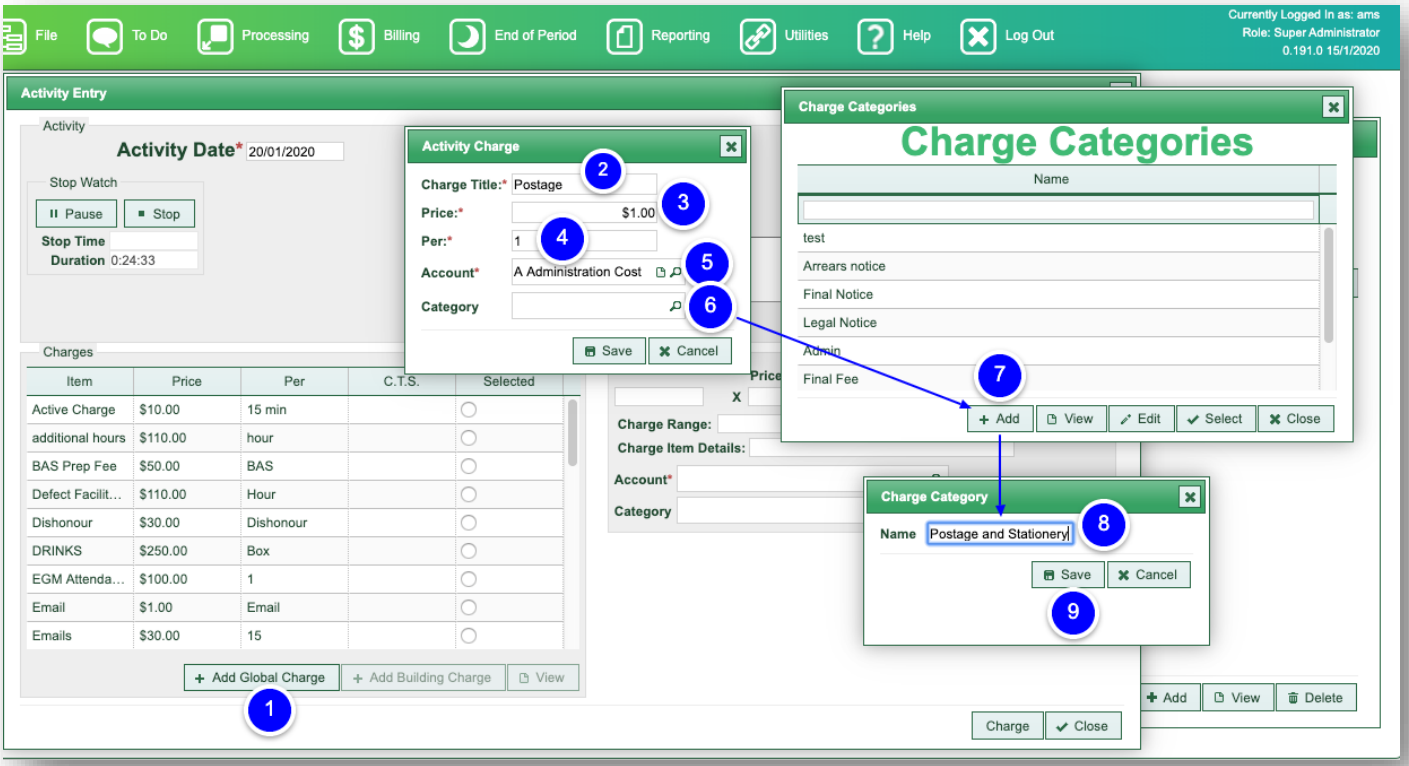


1. You need to select a date  in order to open the activity charges screen
2. Tick *Charge*
3. Select *Add Global Charge*




To add a new charge and category:

1. From the activity Log screen, select +Add global charge
2. Enter a title for the charge
3. Enter a price per unit
4. Enter the unit measurement
5. Use the search icon to find and select the chart of accounts code to allocate this activity log to
6. Use the search icon to open the Charge Categories popup
7. Select *Add*
8. *Save*


File
To Do
Processing
Billing
End of Period
Reporting
Utilities
Help
Log Out
Currently Logged In as: ams
Role: Super Administrator
0.191.0 15/1/2020
Activity Entry
Activity
Activity Date* 20/01/2020
Stop Watch
Pause
Stop
Stop Time
Duration 0:24:33
Charges
Item
Price
Per
C.T.S.
Selected
Active Charge $10.00 15 min
additional hours $110.00 hour
BAS Prep Fee $50.00 BAS
Defect Facilit... $110.00 Hour
Dishonour $30.00 Dishonour
DRINKS $250.00 Box
EGM Attenda... $100.00 1
Email $1.00 Email
Emails $30.00 15
Add Global Charge
Add Building Charge
View
Charge
Close
Activity Charge
Charge Title:* Postage
Price:* $1.00
Per:* 1
Account* A Administration Cost
Category
Save
Cancel
Charge Range:
Charge Item Details:
Account*
Category
Charge Categories
Name
test
Arrears notice
Final Notice
Legal Notice
Admin
Final Fee
Add
View
Edit
Select
Close
Charge Category
Name Postage and Stationery
Save
Cancel
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View
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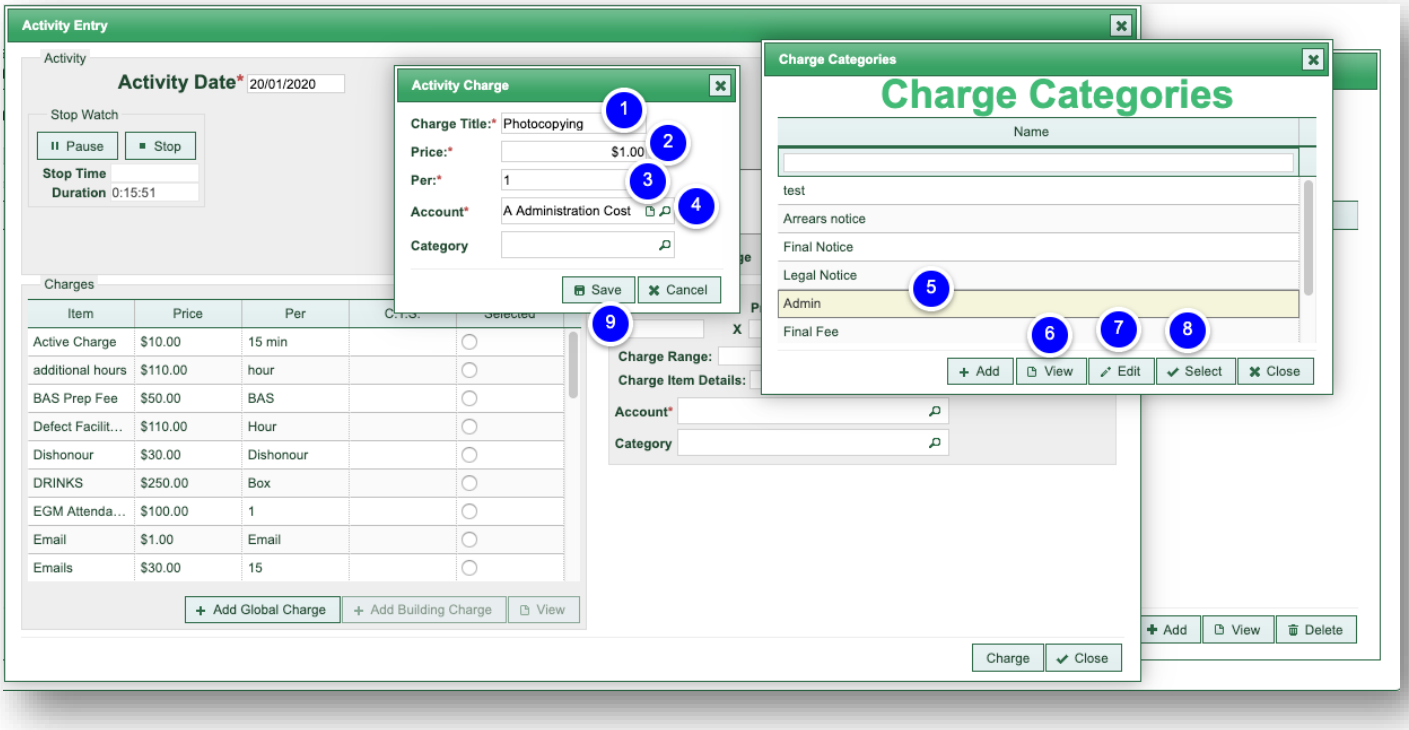
To view edit or select a charge category for an existing charge:

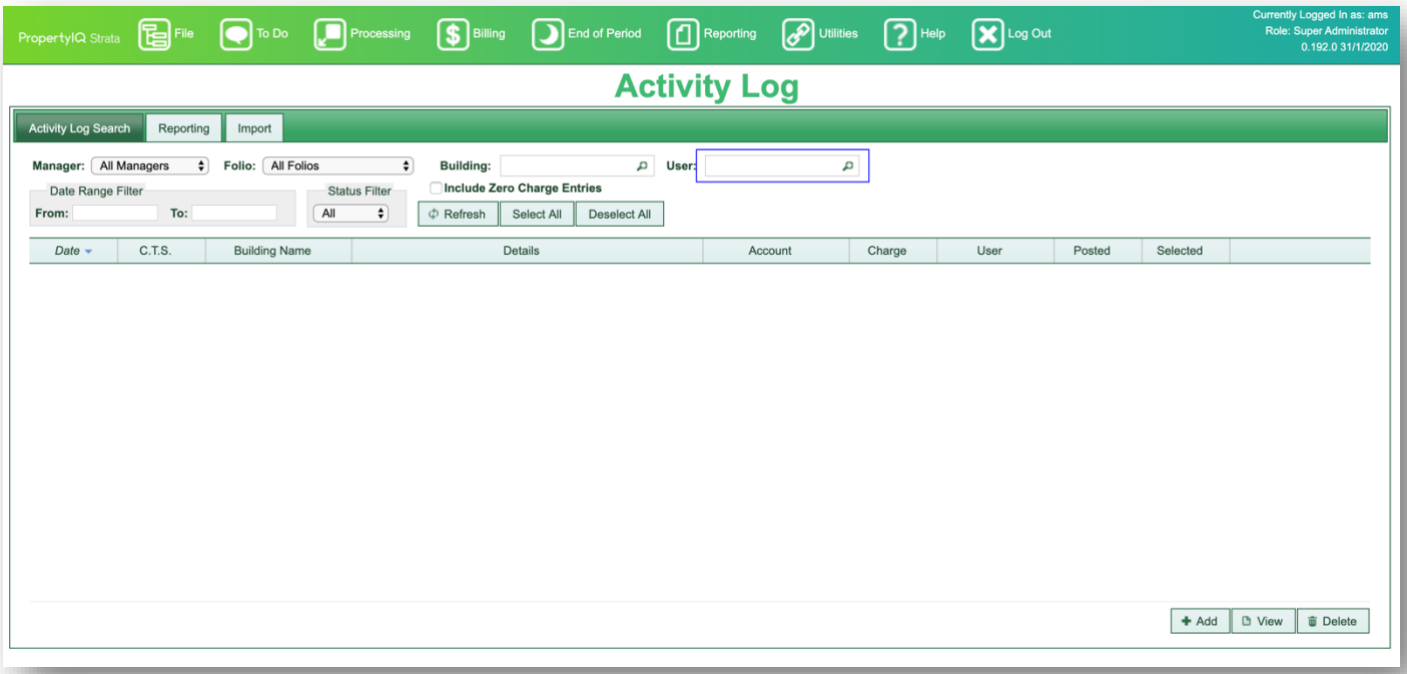
1. The charge title shows here when you select an existing charge
2. The price shows here for an existing charge
3. The chart of accounts code associated with the charge shows here
4. Select the search icon to open the *Charge Categories* popup
5. Click on an existing category to highlight it on the screen
6. Select *View* to open and view the category
7. *Edit* to edit the category
8. *Select* to attach this category to the activity charge type



## ACTIVITY LOG – NEW USER FILTER

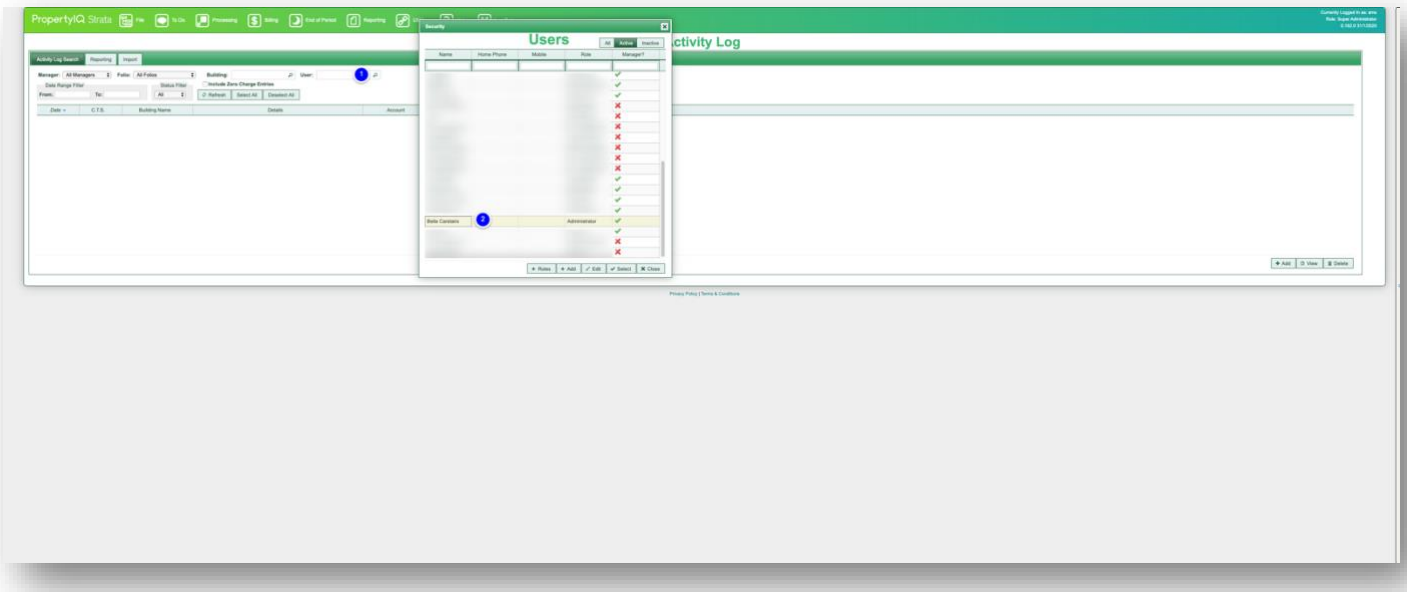
Items recorded via the Activity log can now be assigned a user. You can also reassign the user assigned to an activity. You can filter the activity log screen by user. Changes are recorded in the audit log. PF 372 PF 90 PF 902 PF 892 PF 907 PF 908

There's a new optional user filter on the activity log screen.



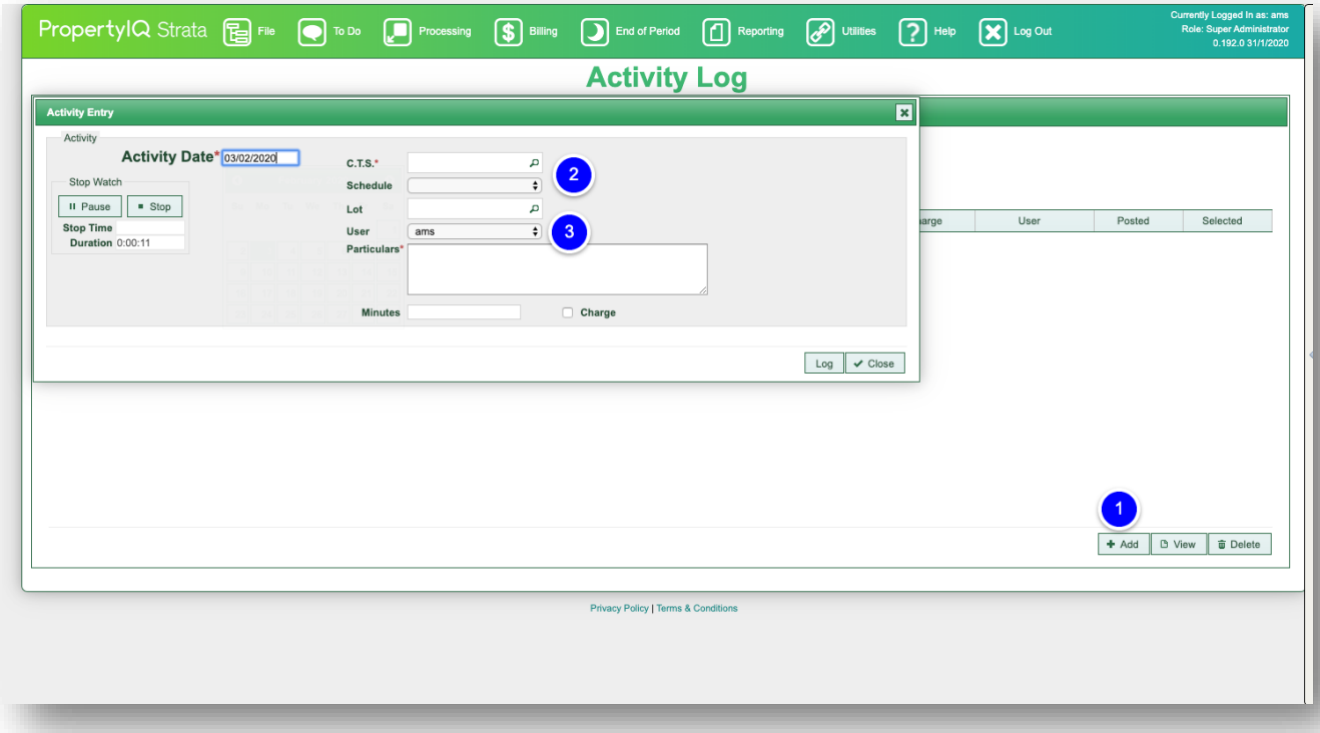

To filter the activity log screen by user:

1. Type the users full name *or* click on the search icon to open the user list
2. Click and then double click to select a user



Creating a new activity – you will be automatically assigned as the user but you can alter by:

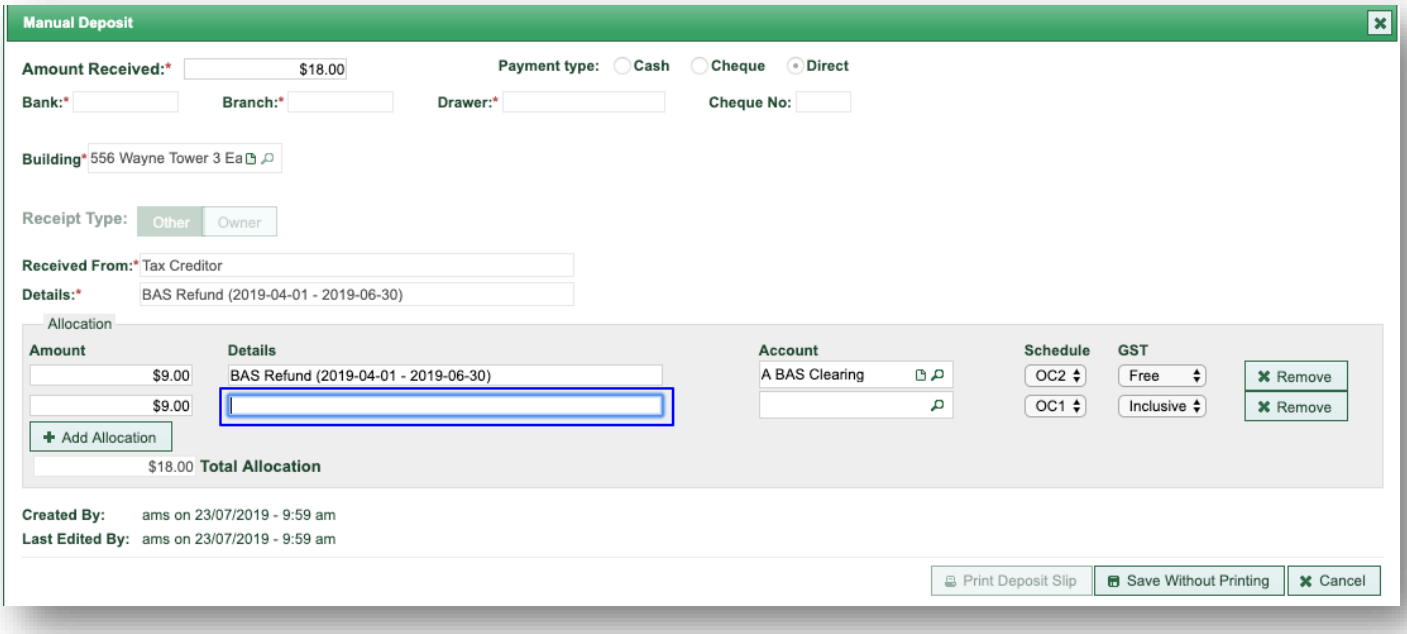
1. From the Activity Log screen select Add or use Ctrl F12 to create a new activity
2. Select/enter other details
3. You will be automatically assigned as the user but you can select another user in your company from the list .




**Note:** The new user options only affect activities entered *after* you've been upgraded to this version, however you will be able to manually assign a user to previously created activities if they are unposted. (subject to some restrictions such as those restricting the ability to edit items in a prior BAS period.) The ability to produce user filtered activity log reports is coming soon.

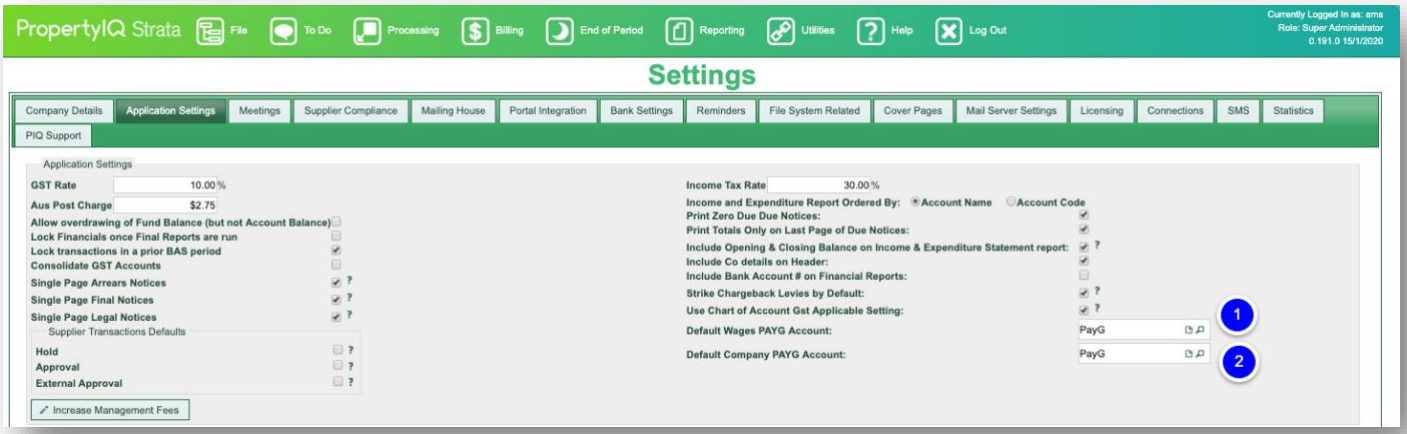
## RECEIPTING - MANUAL DEPOSITS

When creating a manual deposit of the type *Other,* you can now add a description to each line item in the deposit so that different line items that have different details can be easily identified.




## APPLICATION SETTINGS – NEW OPTION TO NOMINATE THE DEFAULT CHART OF ACCOUNTS CODE FOR WAGES PAYG AND COMPANY PAYG.

You can now nominate default chart of accounts codes for PAYG, which will be used in future improvements to PAYG in the BAS workflow. These default accounts will be used when including PAYG in BAS, and when the BAS process automatically creates either manual deposits to receive a BAS refund or supplier payments to make a BAS payment to the ATO.

Go to Utilities>Settings>Application Settings and select *Edit* mode.

1. Use the search icon to find and select the chart of accounts code to allocate to