PropertyIQ

Release Notes February 2022

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Portal Version 2.8

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SUMMARY

CHANGES RELATED TO PIQ PORTAL

1. **Portal email notifications** – Some improvements have been made to portal email notifications for lot owners and committee members to improve readability and user experience.
   - Default frequency for email notifications – For **new** users of the portal, default frequency for email notifications is now set to weekly (instead of daily) to reduce the volume of automated emails being sent. Users can still update their email frequency settings at any time in the portal under the *User Settings* page.
   - Document notifications – More detail is now shown on email notifications when new documents are uploaded to the portal. Under existing 'New documents uploaded' heading in the email, you'll now also see the document category and the document name.
   - Meeting notifications – In 'Upcoming meetings' information, the meeting time shown is now the local time of where the building is located. You'll also see the time zone in brackets after the time. For example, for a building in NSW, you'll see 2.00pm (Sydney time).

   Refer screenshots below.

LOT CATEGORISATION (VICTORIA)

2. **Lot categorisation (VIC)** – A change has been made so that it's no longer mandatory for a secondary lot to be linked to a primary lot. The primary lot field is now optional.

   NOTE: This is only applicable to clients that have the 'Lot Category' feature enabled (VIC).

TERMINOLOGY CHANGES – COMMUNITY SCHEMES (NSW)

3. **Changes to terminology for community schemes** – For community, neighbourhood and precinct buildings in NSW, terminology has changed from Sinking Fund to Capital Works Fund on screens throughout PIQ, financial reports and budget reports. This change has been made as a result of the new *Community Land Management Act 2021*, *Community Land Development Act 2021* and associated regulations which commenced on 1 December 2021.

   ! What you need to do

   You'll need to review your templates in PIQ that are used for community, neighbourhood and precinct buildings ('CA' template type) and update any references to the old legislation. You can view and edit your templates under the *File>Templates* menu.

   If you need help, you can view our help manual on editing templates here.

LOTS – VIEW LINKED LOTS

4. **View linked lots on lot card** – On the lot card, you can now view linked lots under *Info* tab in a new accordion called '*Related Lots'.*

   You can:

   - View linked lots and their relationship
     - Any lots linked to the lot you're currently viewing will be displayed in the *Related Lots* grid. The grid will show basic details of the lot such as OC/SP/CTS number, building name (for non-VIC buildings), building address, lot and unit number, mailing address of the lot and it's relationship to the lot being viewed.
     - There are four (4) possible relationship types displayed under the *Link Type* column:
       i. ***Linked Owner*** – Where you've linked the lots together using the *Link Owners* function.
       ii. ***Linked Lot*** – Where you've linked buildings together using the *Related Buildings* function on *Building card>Info tab>Related Buildings accordion* AND there is a lot in the related building with the same lot number. This caters for a multi-OC scenario in Victoria (unlimited and limited OCs as separate buildings in PIQ) where the same lot appears in two separate OCs.
       iii. ***Primary*** (visible when *Lot Category* feature enabled [VIC]) – This will be visible when the lot you're viewing is a secondary lot and you've linked another lot to it as the primary lot.
       iv. ***Secondary*** (visible when *Lot Category* feature enabled [VIC]) – This will be visible when the lot you're viewing is a primary lot and you've linked lot/s to it as secondary lot/s.
     - Where the *Link Type* is 'secondary', the category type of carpark, storage or other will be displayed in the *Category* column. Note that the *Category* column is only visible when *Lot Category* feature is enabled (VIC).
     - A linked lot can have more than one relationship at a time. Where this occurs, all applicable link types will be displayed against the lot in the *Link Type* column. For example, a lot can have 'linked owner' and 'secondary lot' where you've linked the lots together using the *Link Owners* function and linked a secondary lot to a primary lot using the *Lot Category* feature (VIC).

   - Open the lot card of a linked lot – You can open and view the lot card of a linked lot directly from the *Related Lots* grid by double clicking on the row or by selecting the lot and clicking the *View* button.

   - Print a related lots report - You can generate a Related Lots report by clicking the *Print* button. The PDF report will show all lots, and their details, that are linked to the lot being viewed.

   Refer screenshots below.

LOTS – IMPORT

5. **Lot import function > New data fields** – You can now import the delivery preferences (email and/or post) and the address fields separately for each of the lot delivery types - Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices. Previously, only Due/Fee Notice address fields were available for import, with the same address being applied to all delivery types and all delivery types being set to post by default.

   - Separate delivery preferences – Import the delivery method for Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices as **email and/or post** (Y or N option for both).

   - Separate address fields – Import separate address fields for Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices.

   Refer below for more detail and screenshots.

6. **Lot import validation screen –** Improvements have been made to the wording at the top of the lot import validation screen to avoid any confusion around the import behaviour.
   - Old wording: "Optional fields that are missing or invalid are highlighted in yellow. Mandatory fields that are invalid are highlighted in red."
   - New wording: "Fields that are missing or contain invalid data, and will be imported are highlighted in yellow. Fields that are missing or contain invalid data, and will prevent the lot from being imported are highlighted in red."

UNIDENTIFIED DEPOSITS - DEBTORS

7. **Allocate unidentified deposit to debtor** – Under *Processing>Receipts>Unidentified Deposits* tab, you can now allocate an unidentified deposit to a Debtor.

   Refer below for more detail and screenshots.

GENERAL

8. **Lots > Export** – If you've enabled the display of the 'Other DRN' field on the lot card, the *Other DRN* field will now be included in the Lot export file between the *Index* and *Name* columns.
9. **Suppliers > Export** – Additional information is now available in the Suppliers export file. It now includes GST Registered status (Y or N), License No, Balance and Phone 2.
10. **Building schedules export** – An issue has been fixed where a long schedule name (over 31 characters) was causing an error when trying to export the report.
11. **Building card > Related Buildings accordion** – When viewing the *Related Buildings* accordion on *Building card>Info tab*, the *Add, Remove, Print* and *View* buttons will be shown when in view mode. When in edit mode, the *Print* and *View* buttons will be displayed only. This change makes it consistent with similar screens and accordions in PIQ.
12. **Building card > Related Buildings indicator** – When there's 1 or more related buildings linked to a building under *Building card>Info tab>Related Buildings accordion*, a new indicator will be displayed under the SP/CTS/OC number field at the top of the building card so at a glance you can see there's linked buildings. Refer below screenshot.
13. **Fee Schedule > Activity charges** – When processing charges on the *Billing>Fee Schedules* screen, it was possible to duplicate some activity charges by clicking the *Process* button a second time, while the first charges run is still being processed. This issue has now been fixed.
14. **Activity log > Import** – When importing activity log charges under *Processing>Activity Log>Import tab*, the date of each charge will now be validated against the last BAS period and final financial report period (where the application settings to lock transactions in prior BAS and final report periods are enabled).
    Any conflicting charges will appear in the *Invalid Data* section of the import validation screen and display the relevant message of "Transactions cannot be created as the final financial reports have been run for this period" and/or "Transactions cannot be created in a previous BAS period".
15. **Supplier transactions > Charge owner account selection** - On *Processing>Supplier Transactions>Charge Owner screen*, when using either the Admin or Sinking/Capital/Reserve account fields, it will now only display accounts related to the selected Fund. For example, selecting Admin account field will only display Admin Fund accounts for selection.
16. **Global audit trail > Journal adjustments** – Creating, editing or deleting journal adjustments is now captured in the global audit trail.
17. **Global audit trail > Bank adjustments** – Creating, editing or deleting bank adjustments is now captured in the global audit trail.

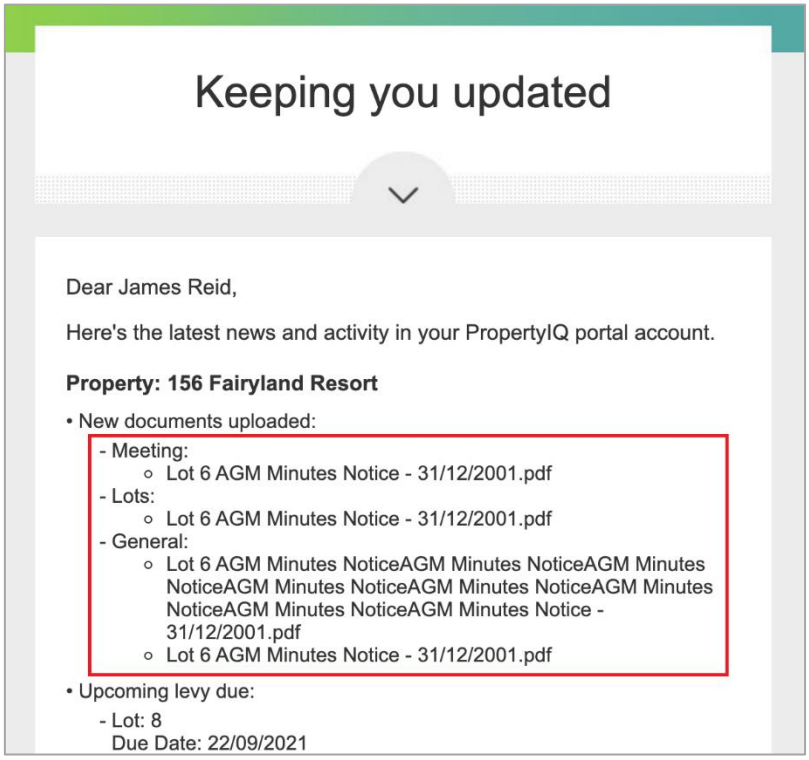
DETAILED SCREENSHOTS

ITEM 1 – PORTAL – EMAIL NOTIFICATIONS

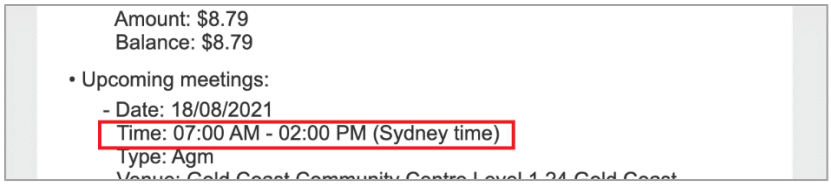
Some improvements have been made to portal email notifications for lot owners and committee members to improve readability and user experience.

- **Default frequency for email notifications** – For **new** users of the portal, default frequency for email notifications is now set to **weekly** (instead of daily) to reduce the volume of automated emails being sent. Users can still update their email frequency settings at any time in the portal under the *User Settings* page.

- **Document notifications** – More detail is now shown on email notifications when new documents are uploaded to the portal. Under existing 'New documents uploaded' heading in the email, you'll now also see the **document category** and the **document name**.

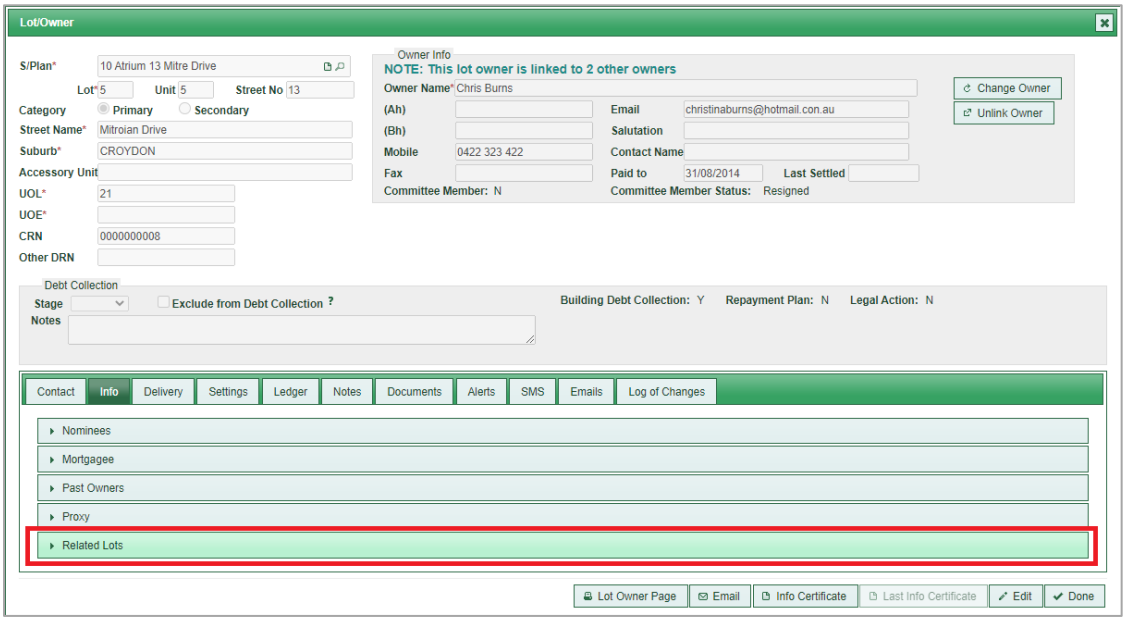


- **Meeting notifications** – In 'Upcoming meetings' information, the meeting time shown is now the local time of where the building is located. You'll also see the time zone in brackets after the time. For example, for a building in NSW, then you'll see 2.00pm (Sydney time).

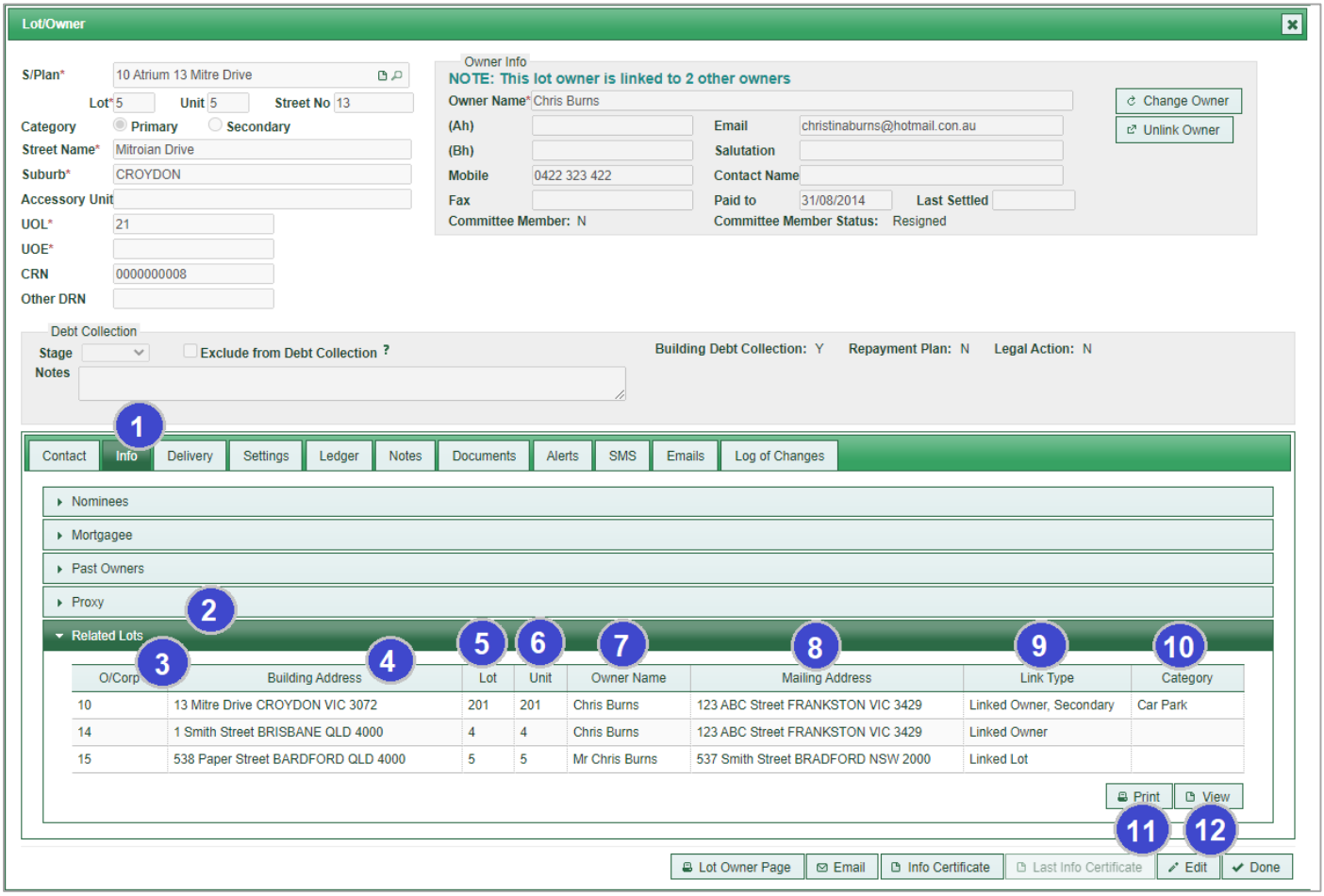


ITEM 4 – VIEW LINKED LOTS

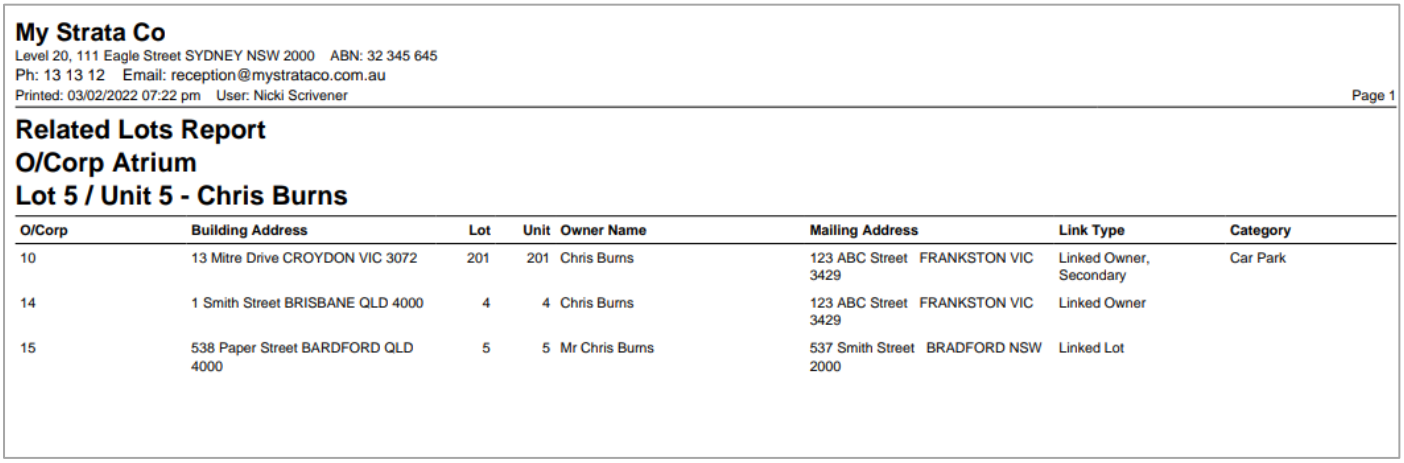
On the lot card, you can now view linked lots under *Info* tab in a new accordion called '*Related Lots'.*



1. Open the lot card and go to the *Info* tab
2. Open the *Related Lots* accordion. Any linked lots will show in the grid.
3. OC/SP/CTS number of the lot will show here.
4. Building address will show here.
   NOTE: For non-VIC buildings, the building name will also be shown in a separate column
5. Lot number will show here.
6. Unit number will show here.
7. Owner name will show here.
8. Mailing address of the lot will show here.
9. Link type will show here. This will show the linked lot's relationship to the lot being viewed.
   - There are **four (4) relationship types** displayed under the *Link Type* column:
     i. *Linked Owner* – Where you've linked the lots together using the *Link Owners* function.
     ii. *Linked Lot* – Where you've linked buildings together using the *Related Buildings* function on *Building card>Info tab>Related Buildings accordion* **AND** there is a lot in the related building with the same lot number. This caters for a multi-OC scenario in Victoria (unlimited and limited OCs as separate buildings in PIQ) where the same lot appears in two separate OCs.
     iii. *Primary* (visible when *Lot Category* feature enabled [VIC]) – This will be visible when the lot you're viewing is a secondary lot and you've linked another lot to it as the primary lot.
     iv. *Secondary* (visible when *Lot Category* feature enabled [VIC]) – This will be visible when the lot you're viewing is a primary lot and you've linked lot/s to it as secondary lot/s.
   - A **linked lot can have more than one relationship** at a time. Where this occurs, all applicable link types will be displayed against the lot in the *Link Type* column. For example, a lot can have 'linked owner' and 'secondary lot' where you've linked the lots together using the *Link Owners* function and linked a secondary lot to a primary lot using the *Lot Category* feature (VIC).
10. Category of the lot will show here, where the Link Type is 'secondary'. The category type of *carpark*, *storage* or *other* will be displayed.
    NOTE: The Category column is only visible when Lot Category feature is enabled (VIC).
11. Click here to print a Related Lots report to PDF. Example report below.
12. You can view the lot card of a linked lot by selecting a lot in the grid and clicking the *View* button. Alternatively, you can double click on a lot in the grid.



Example – Related lots report:



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Related Lots Report
O/Corp Atrium
Lot 5 / Unit 5 - Chris Burns

O/Corp	Building Address	Lot	Unit	Owner Name	Mailing Address	Link Type	Category
10	13 Mitre Drive CROYDON VIC 3072	201	201	Chris Burns	123 ABC Street FRANKSTON VIC 3429	Linked Owner, Secondary	Car Park
14	1 Smith Street BRISBANE QLD 4000	4	4	Chris Burns	123 ABC Street FRANKSTON VIC 3429	Linked Owner	
15	538 Paper Street BARDFORD QLD 4000	5	5	Mr Chris Burns	537 Smith Street BRADFORD NSW 2000	Linked Lot	

ITEM 5 – LOT IMPORT FUNCTION – NEW DATA FIELDS

You can now import the delivery preferences (email and/or post) and the address fields separately for each of the lot delivery types - Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices.

Previously, only Due/Fee Notice address fields were available for import, with the same address being applied to all delivery types and all delivery types being set to post by default.

Separate delivery preferences

Import the delivery method for Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices as **email and/or post** (Y or N option for both).

- New email data field and column is when *Lot Category* feature is enabled (VIC).called "Email [type]" (where type is Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices).
- New post data field and column is available for selection in the import screen called "Post [type]" (where type is Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices).
- If the delivery method is not provided in the import, it will be defaulted to post for each type.
- If the delivery method for email AND post are both set to 'N' in the import, an error message will appear in the lot import validation screen and you'll be asked to set one of them as 'Y'.
- If the delivery method for email is set as 'Y', a valid email address will be required when importing. If a valid email address is not provided, an error message will appear in the lot import validation screen.

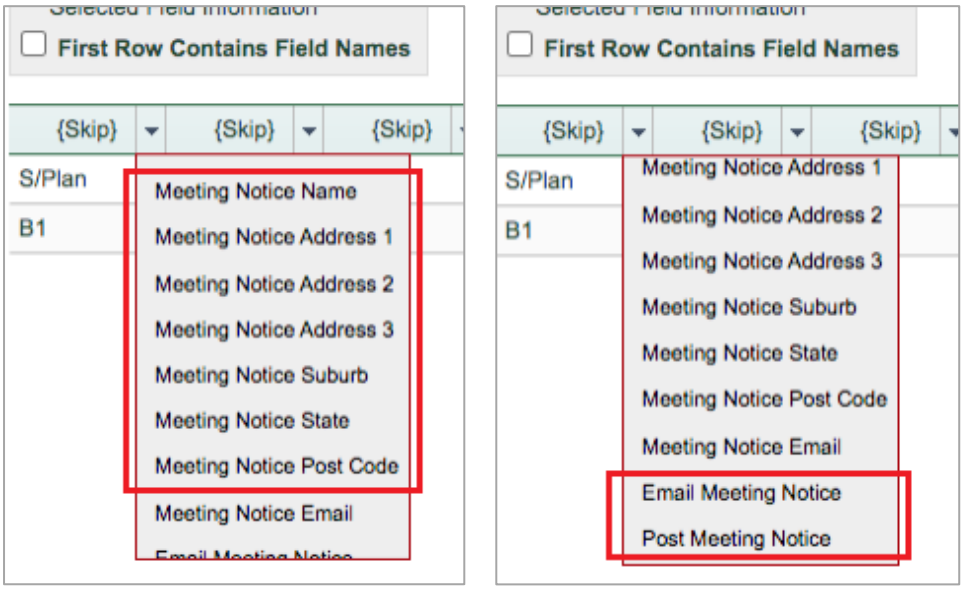
Separate address fields

Import separate address fields for Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices.

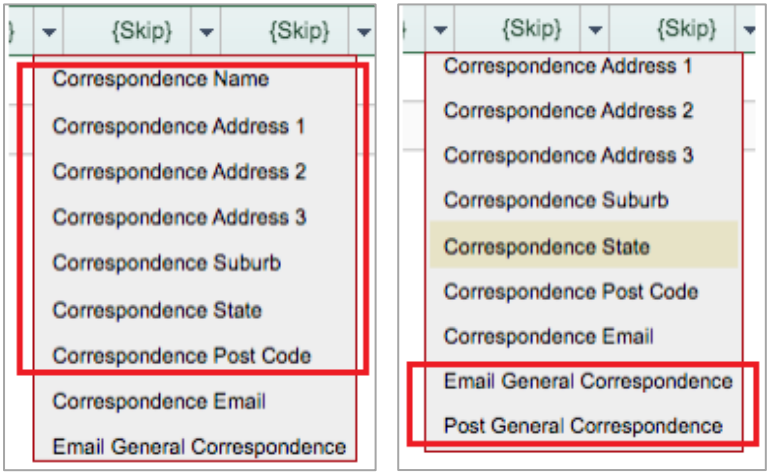
- ***New fields*** are available for selection on the import screen for each type (Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices):
  - Name, Address 1, Address 2, Address 3, Suburb, State, Post Code and Email.
- ***Rules*** when setting the Recipient Type (Agent / Owner / Tenant / Other):
  - Where the six key address fields (Name, Email, Address 1, Address 2, Address 3, Suburb) are selected for import for Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices and **all** fields **MATCH** the same fields of the Owner Address, the **recipient type** will be set as ***Owner***.
  - Where the six key address fields (Name, Email, Address 1, Address 2, Address 3, Suburb) are selected for import for Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices and **all fields are left BLANK**, the **recipient type** will be set as ***Owner***.
  - Where the six key address fields (Name, Email, Address 1, Address 2, Address 3, Suburb) are selected for import for Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices, and **some fields MATCH** and **some are BLANK**, the **recipient type** will be set as ***Owner***.
  - Where the six key address fields (Name, Email, Address 1, Address 2, Address 3, Suburb) are selected for import for Due/Fee Notices, Meeting Notices, General Correspondence and Utility Notices, and **any** of the fields are **DIFFERENT** to the Owner Address, the **recipient type** will be set as ***Other***.

Refer screenshots below.

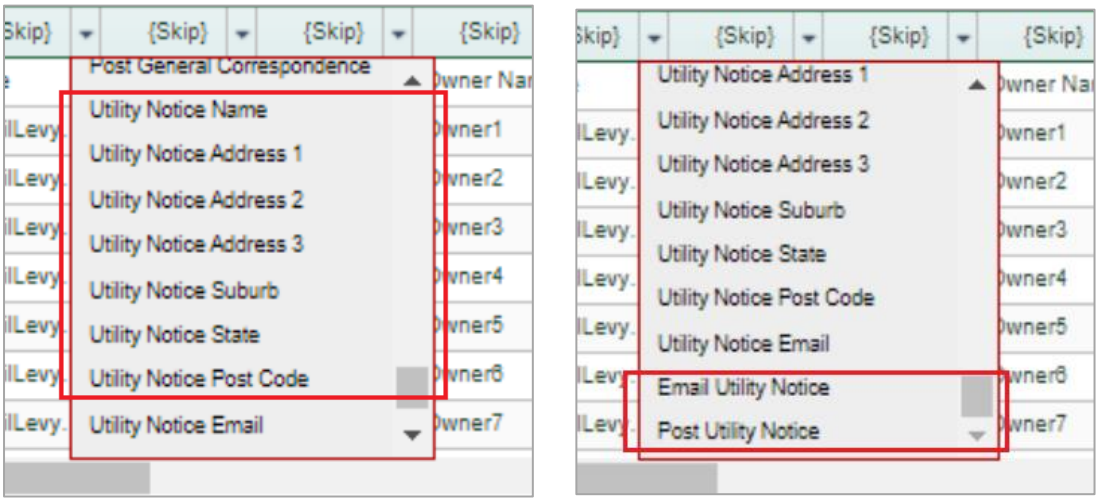
Meeting Notices – New address fields and delivery preferences



Correspondence – New address fields and delivery preferences



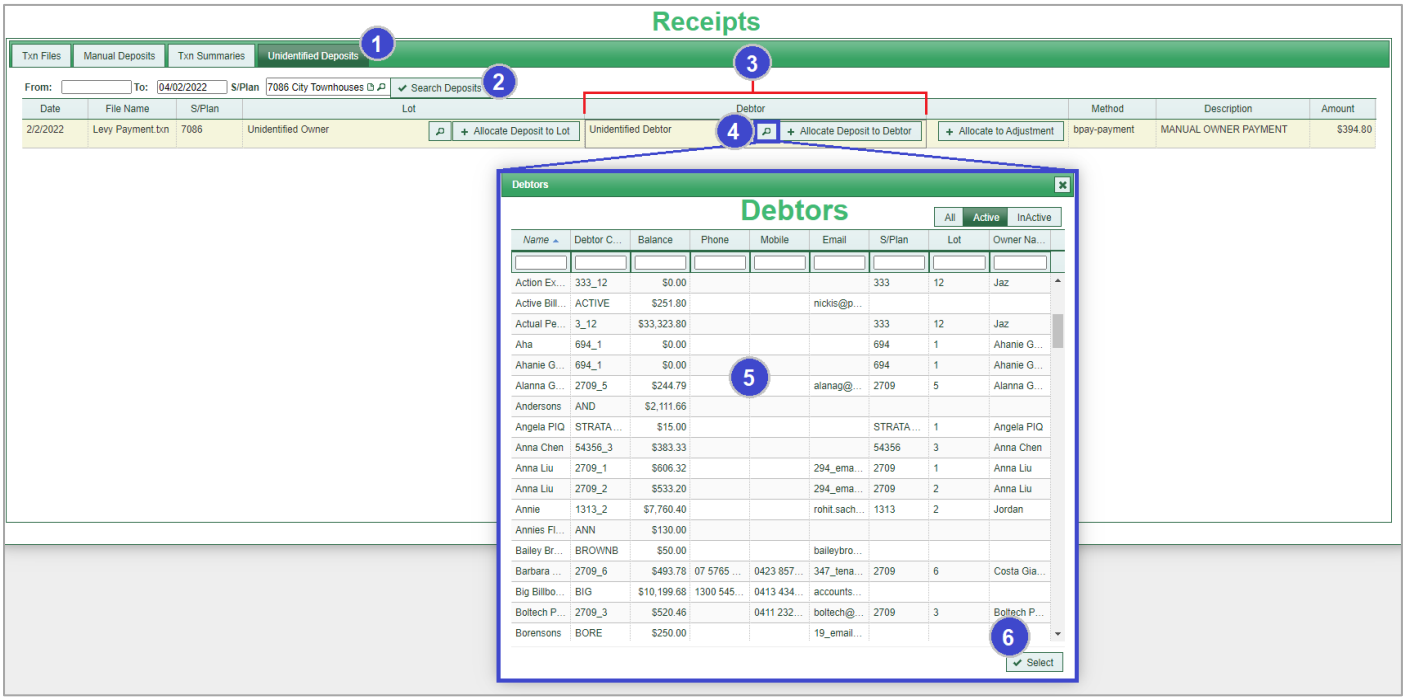
Utility Notices – New address fields and delivery preferences



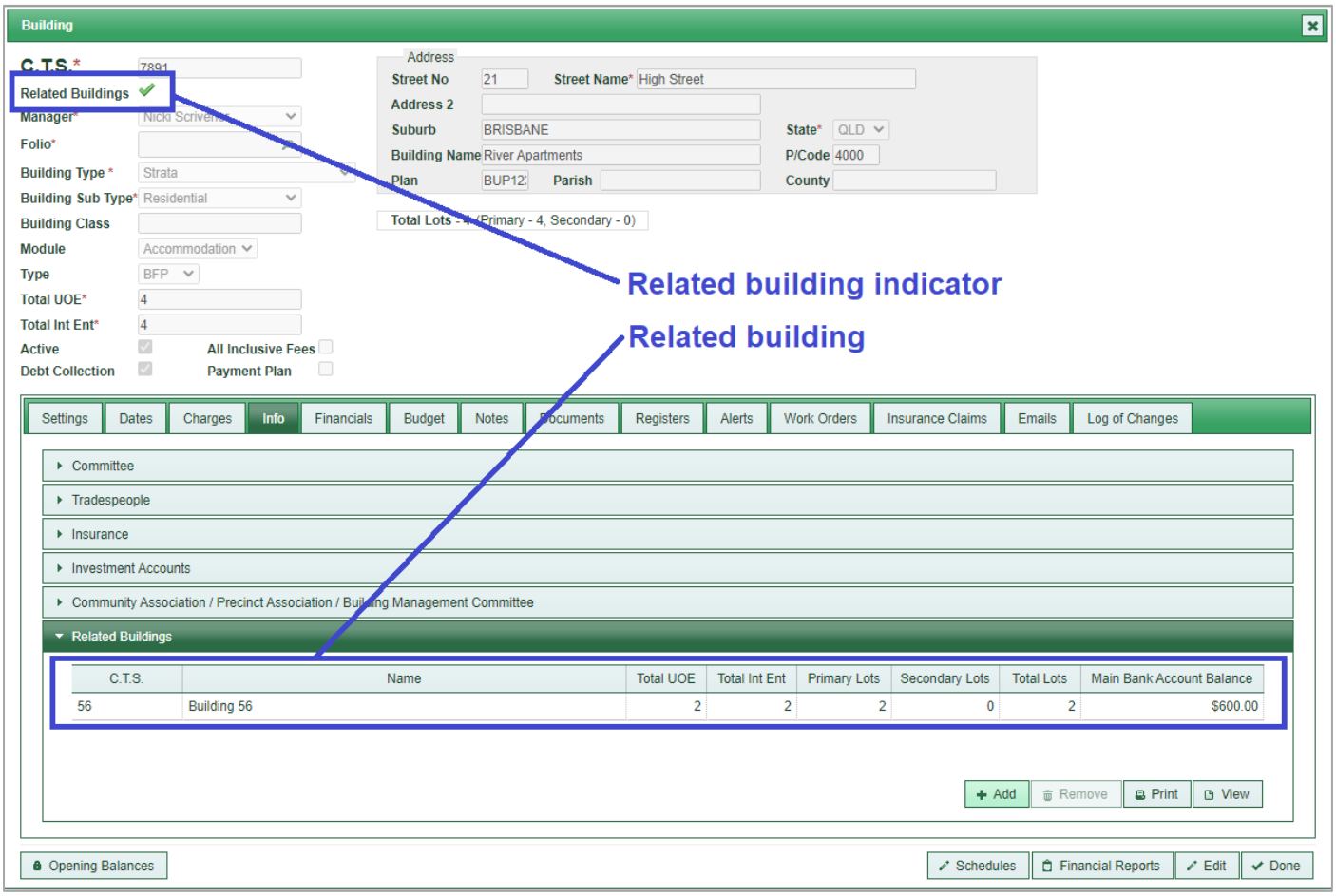
ITEM 7 - ALLOCATE UNIDENTIFIED DEPOSIT TO DEBTOR

Under *Processing>Receipts>Unidentified Deposits* tab, you can now allocate an unidentified deposit to a Debtor.

1. Go to *Processing>Receipts>Unidentified Deposits* tab.
2. Enter your search parameters e.g From date or a building, then click *Search Deposits* button. Any unidentified deposits will appear in the grid.
3. You'll see a new *Debtor* column that will allow you to allocate a deposit to a debtor.
4. In the *Debtor* column, click the search icon to open the global list of debtors.
5. Search and find your debtor. Click on the debtor to highlight the row.
6. Once a debtor is selected, click *Select* button.



7. The selected debtor will now appear in the column.
8. Click *Allocate Deposit to Debtor* button to allocate the deposit to the selected debtor.
   Once this is done, the unidentified deposit will disappear from this screen and you will find the deposit receipted against the debtor's ledger.

ITEM 12 – BUILDINGS – RELATED BUILDINGS INDICATOR

When there's 1 or more related buildings linked to a building under *Building card>Info tab>Related Buildings accordion*, a new indicator will be displayed under the SP/CTS/OC number field at the top of the building card so at a glance you can see there's linked buildings.