PropertyIQ

Release Notes June 2021

PropertyIQ Version 0.222.2
Portal Version 2.5

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SUMMARY

CHANGES RELATED TO PORTAL

PIQ Portal - Improvements for Portal Administrators:

1. **New configuration settings** – Under Portal Administrator login > Configuration page, there's now additional configuration settings for the *Building page* under Owner and Committee personas, customisable at a Global or Folio level. You can now enable or disable ALL fields shown on the Building page in the portal (except *Building page* and *Property Info* options as this is the home page), giving you complete flexibility on what information is shown to your lot owners and committee members.

   For more information, refer screenshots below.

2. **Buildings & Users list** – Under Portal Administrator login > Buildings page and Users page, any *inactive* buildings and *inactive* users will no longer appear in the list.

3. **Company Info > Main contacts** – Under Portal Administrator login > Company Info page > Main Contacts section, an issue has been fixed when adding or editing a main contact's phone number. The leading zero of the phone number will no longer be dropped off when saving the contact.

PIQ Portal - Improvements for Lot Owners/Committee Members:

4. **Forgotten Password screen** – Improvements have been made to the messaging shown to users during the Forgotten Password process to advise that the password reset email may take some time to be received, and to use the most recent reset email if multiple requests were submitted. This is to avoid confusion about whether the request had already been made and avoid users submitting multiple Forgot Password requests. Refer screenshots below.

5. **Notifications** – Where a Portal Administrator has disabled any of the Meetings, Levies and/or Documents pages, and any of the individual Document Categories in Portal, notifications will no longer be sent to lot owners and/or committee members for content relevant to those respective pages. This avoids notifications being sent to lot owners and/or committee members in error.

   For example, if the Documents page is disabled for lot owners and a document is auto-published to portal in a category enabled for lot owners, the lot owner would not see the document in portal AND won't receive a notification that a new document is available.

6. **Contact strata manager form** – Under Building page > Strata Manager details > Contact button > Contact Strata Manager online form, the email field currently pre-populates with the lot owner's or committee member's email address. This email field has now been made *read-only* (not editable) to improve security and prevent malicious content and spam being sent to the entered email address.

7. **Financials page > Arrears balance** – Under Financials page > Bank Balances bar > Arrears amount, the arrears balance being shown in Portal uses the default *Receivable* chart of accounts in PropertyIQ. An issue has been fixed where if the default name of the *Receivable* accounts are changed in PropertyIQ, an incorrect arrears balance is shown in Portal. Now, regardless of the name of the default *Receivable* accounts, Portal will always show the correct arrears balance.

MULTI-FACTOR AUTHENTICATION (MFA)

8. **Multi-factor authentication (MFA)** – A new two-step Multi-factor Authentication (MFA) feature is now available. You may be familiar with this type of feature when signing in to Google or Apple, where you enter your password and one other piece of information to verify your identify.

   You can setup and manage MFA at the user level under *Utilities>Security* screen, which'll require you to have permission to *View Users* and *Edit Users* in your PropertyIQ. Changes to the MFA status of a user will be recorded in the global audit trail under *Utilities>Audit Trail*.

   Benefits of MFA

   - Provides an extra layer of security for your account and any sensitive information saved in your PropertyIQ.
   - Ensures only authorised users can login and access PropertyIQ by requiring the user to enter an additional authentication code at the time of login.
   - Easily enable, reset or disable MFA at the user level, allowing flexible roll out in your business to one or more staff members at a time.

   You can

   - Enable MFA for users
   - Setup MFA on the user's next login
   - Login with MFA
   - View MFA status of users
   - Reset MFA for users
   - Disable MFA for users
   - Use MFA during session timeout

   To get started

   1. Review your existing user roles and responsibilities to understand your MFA needs.
   2. It's recommended that you begin by enabling MFA for your *Administrator* user accounts.
   3. **Anyone using MFA will need to have an Android or iOS mobile device available.**
   4. View our detailed guide on setting up and managing MFA.

   For more information, refer screenshots below or view our detailed guide *Multi-factor Authentication (MFA) for Users*.

   ! ***IMPORTANT NOTE:*** *This feature is only available to Macquarie AWS cloud hosted clients.*

PAYG

9. **Default Wages PAYG accounts** – Two new default Wages PAYG accounts (Administrative Fund and Sinking/Capital/ Reserve/Maintenance Fund) have been created and added to the default list of accounts in PropertyIQ. You can now use the existing '*PAYG*' account for Company PAYG and the new '*Wages PAYG*' account for Wages PAYG, which will ensure transactions for the two types of PAYG are recorded separately for Income Tax purposes.

   - View the new default Wages PAYG accounts (AF & SF) under *File > Chart of Accounts* list
   - Set or update your default PAYG accounts in Application settings (used for BAS workflow & Income Tax Reporting) under *Utilities > Settings > Application Settings tab > Financial Reporting Settings* section
   - New validation when setting or updating your default PAYG accounts under *Utilities > Settings > Application Settings tab > Financial Reporting Settings* section to ensure the ***same*** account isn't selected for both Company PAYG & Wages PAYG.

   What you need to do: If you'd like to use the new default Wages PAYG account for the BAS workflow, you'll need to select this account under *Utilities > Settings > Application Settings tab > Financial Reporting Settings* section > *Default Wages PAYG Account* field. Refer examples and screenshots below.

SUPPLIER TRANSACTIONS

10. **Cancellation of partially paid supplier invoices –** Improvements have been made to allow the cancellation of a partially paid supplier invoice so that the remaining unpaid amount can be removed from the system where it's unlikely that future payments and credit notes will be raised against the same supplier. Previously, only fully unpaid invoices could be cancelled using a credit note.

    To cancel a partially paid supplier invoice, you can use the same process and functionality as is currently in place for a fully unpaid invoice. For more information, refer details below.

GENERAL

11. **Virus scan for Incoming Email attachments -** When importing and saving Incoming Emails (and their attachments) to PropertyIQ under *Utilities > Emailing > Incoming tab*, the system will now scan the content of the email for imbedded files/images and any email attachment/s for viruses or other malicious content.
    - If there is no malicious content found, the import will proceed as normal and the email and attachment/s will be saved into PropertyIQ.
    - If malicious content is found within the email (embedded files/images), the email will still be imported and saved, however the embedded files/images will be removed. You'll see an error message in the email preview that states "Attachment/s have been removed as malicious content was detected."
    - If malicious content is found in an email attachment, the email will still be imported and saved, however the attachment will not. You will still see the attachment name and size under details; however the download button for the attachment won't be available and you'll see an error message on screen that states "Unable to be downloaded as malicious content was detected."

    ! *IMPORTANT NOTE: This change is only applicable to Macquarie AWS cloud hosted clients.*

12. **Bulk financial reports –** The behaviour of bulk financial reports has been updated to make it consistent with report generation under the Building card>Financial Reports screen.
    Under Reporting > Building > Financial screen, when generating bulk financial reports and the start date selected is prior to the opening balance date of a building being included in the report run, then:
    - the data showing in all financial reports for each of those buildings will commence from the respective building's opening balance date; and,
    - the *From Date* displayed in the header of the financial reports for each of those buildings will be the building's opening balance date.

    This behaviour applies to all report types generated EXCEPT the Income & Expenditure Statement.
    Further, where the selected *From Date* and *To Date* of the report run are both prior to a building's opening balance date, that building will be excluded from the report run.

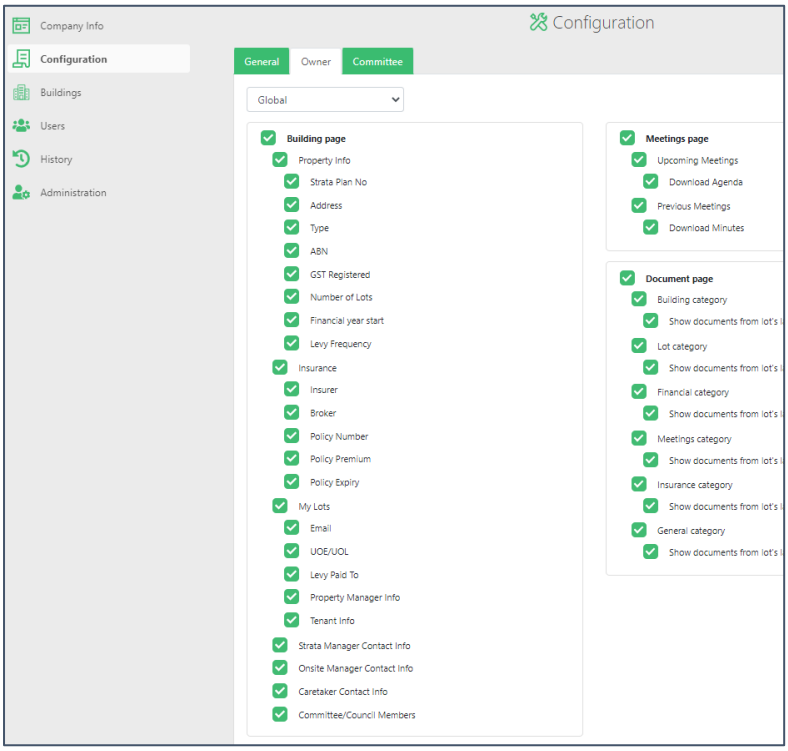
DETAILED SCREENSHOTS

ITEM 1 – PORTAL - NEW CONFIGURATION SETTINGS FOR ADMINISTRATORS

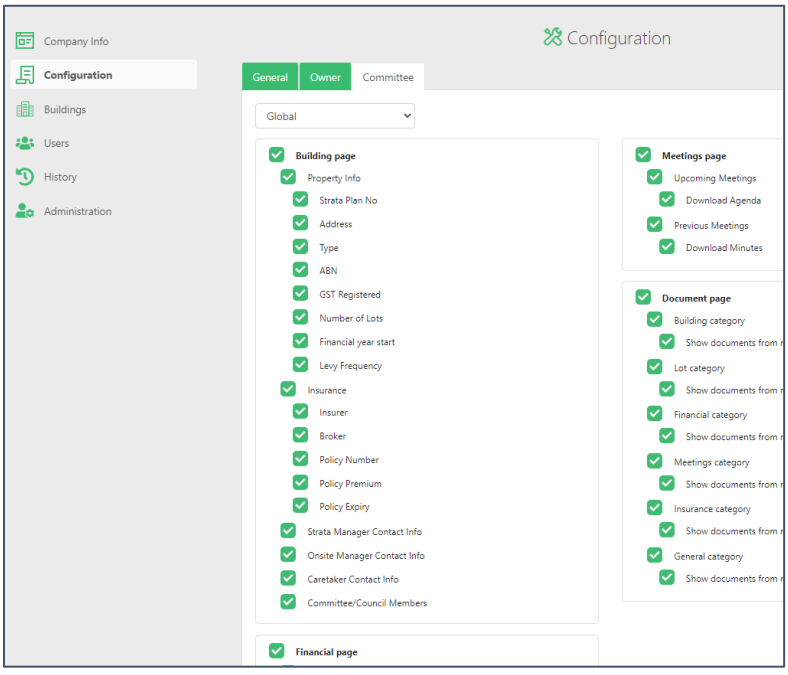
Under Portal Administrator login > Configuration page, there's now additional configuration settings for the *Building page* under Owner and Committee personas, customisable at a Global or Folio level.

You can now **enable or disable ALL fields shown on the Building page in the portal** (except *Building page* and *Property Info* options as this is the home page), giving you complete flexibility on what information is shown to your lot owners and committee members.

Configuration > Owner > Building page:



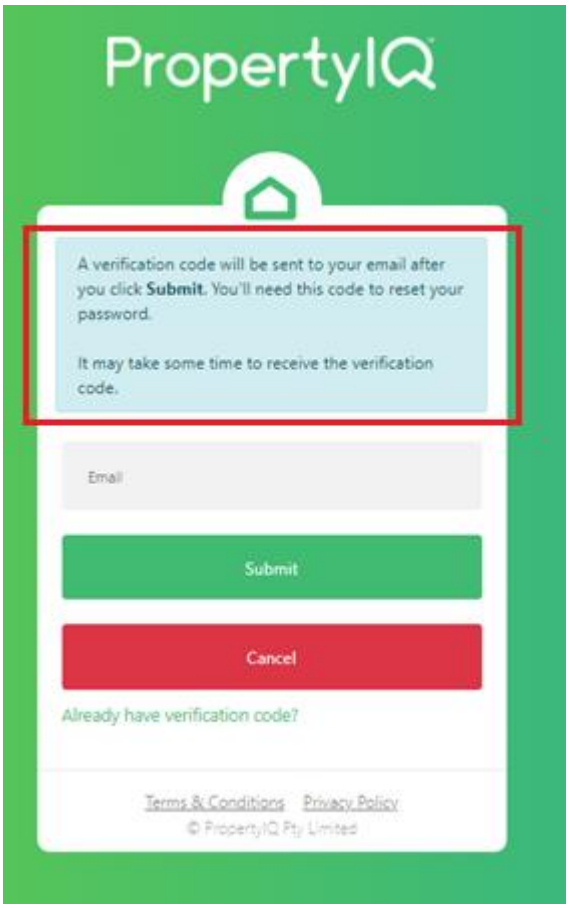
Configuration > Committee > Building page:

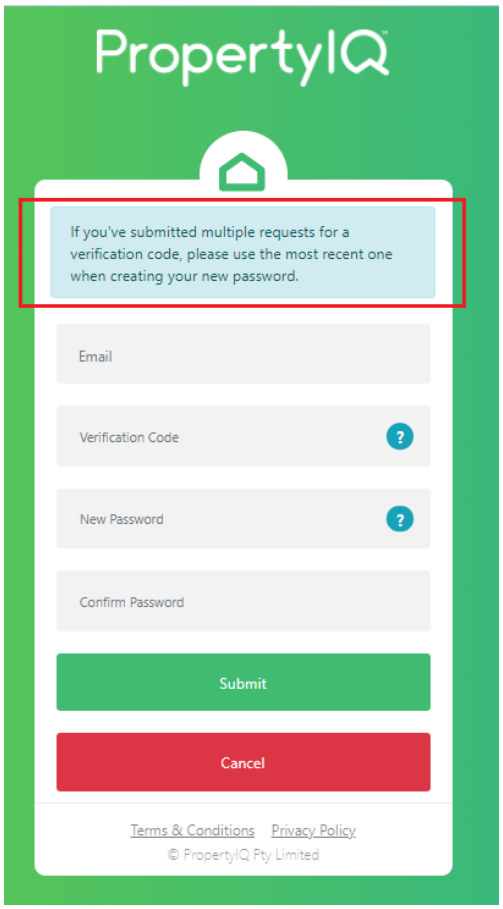


ITEM 4 – PORTAL - FORGOTTEN PASSWORD SCREEN

Improvements have been made to the messaging shown to users during the Forgotten Password process to advise that the password reset email may take some time to be received, and to use the most recent reset email if multiple requests were submitted. This is to avoid confusion about whether the request had already been made and avoid submitting multiple Forgot Password requests.

Forgotten Password screens:





ITEM 8 – MULTI-FACTOR AUTHENTICATION (MFA)

A two-step Multi-factor Authentication (MFA) feature is now available. You may be familiar with this type of feature when signing in to Google or Apple, where you enter your password and one other piece of information to verify your identity.

You can setup and manage MFA at the user level under *Utilities>Security* screen, which'll require you to have permission to *View Users* and *Edit Users* in your PropertyIQ. Changes to the MFA status of a user will be recorded in the global audit trail under *Utilities>Audit Trail*.

Benefits of MFA

- Provides an extra layer of security for your account and any sensitive information saved in your PropertyIQ.
- Ensures only authorised users can login and access PropertyIQ by requiring the user to enter an additional authentication code at the time of login.
- Easily enable, reset or disable MFA at the user level, allowing flexible roll out in your business to one or more staff members at a time.

You can

- Enable MFA for users
- Setup MFA on user's next login
- Login with MFA
- View MFA status of users
- Reset MFA for users
- Disable MFA for users
- Use MFA during session timeout

To get started

1. Review your existing user roles and responsibilities to understand your MFA needs.
2. It's recommended that you begin by enabling MFA for your *Administrator* user accounts.
3. **Anyone using MFA will need to have an Android or iOS mobile device available.**
4. View our detailed guide on setting up and managing MFA.

For more information, view our detailed guide *Multi-factor Authentication (MFA) for Users*.

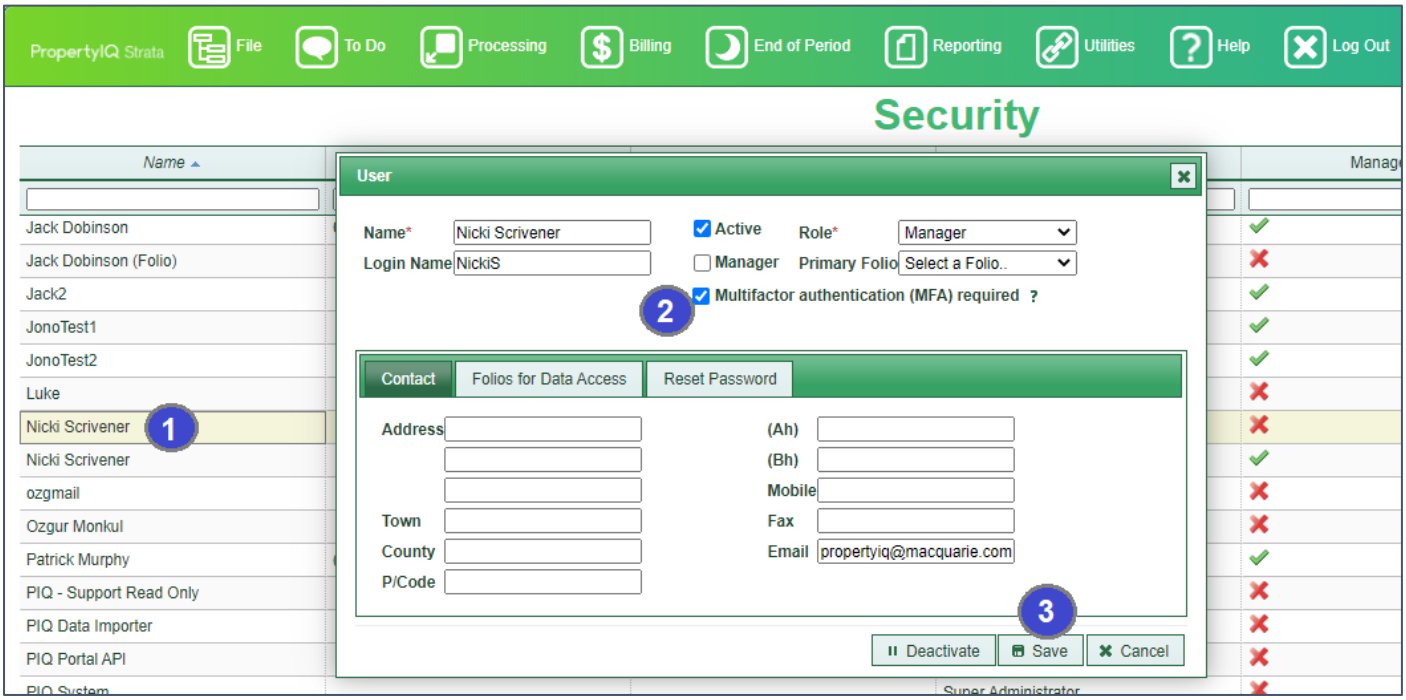
! ***IMPORTANT NOTE:*** *This feature is only available to Macquarie AWS cloud hosted clients.*

ENABLE MFA FOR USERS

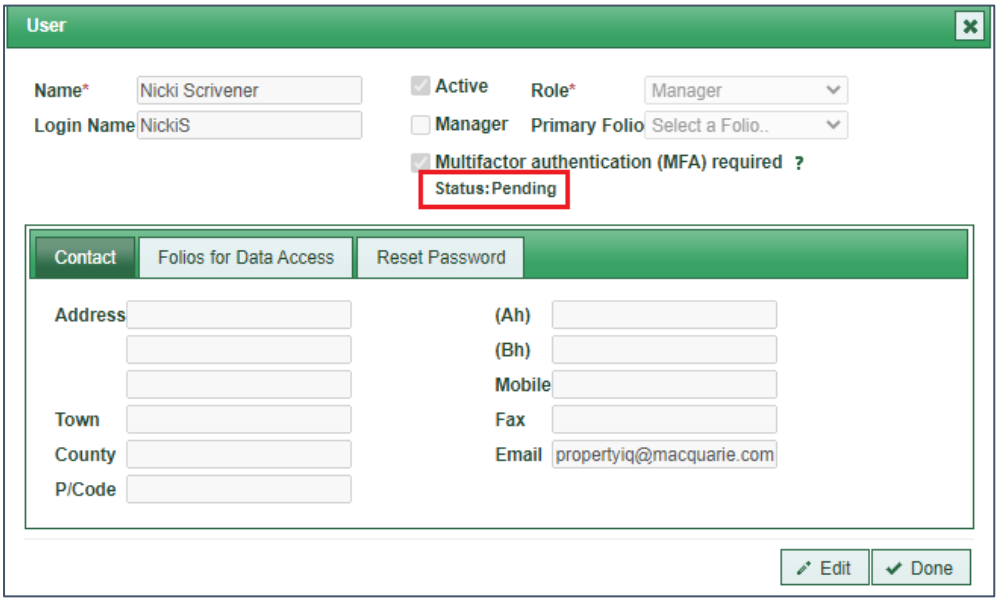
Go to the Utilities > Security screen.

1. View and open the User card of the relevant user
2. In Edit mode, tick the checkbox called *Multifactor authentication (MFA) required*
3. Click *Save*

? **The help icon states:** "*MFA provides an additional layer of security when signing in. When ticked, signing into PIQ will require both password and a verification code that this user can generate with an authentication app. Once configured, the user can get verification codes without the need for a network or mobile connection.*"



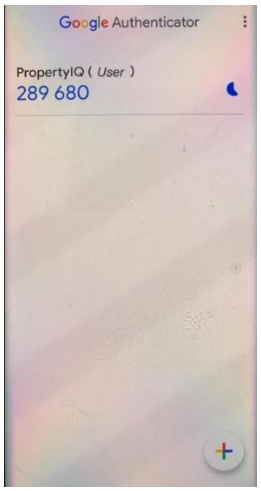
Once MFA is enabled, the user's MFA Status will show as *Pending*.



The user will then be required to setup MFA on their next login to PropertyIQ. Refer instructions Setup MFA on user's next login.

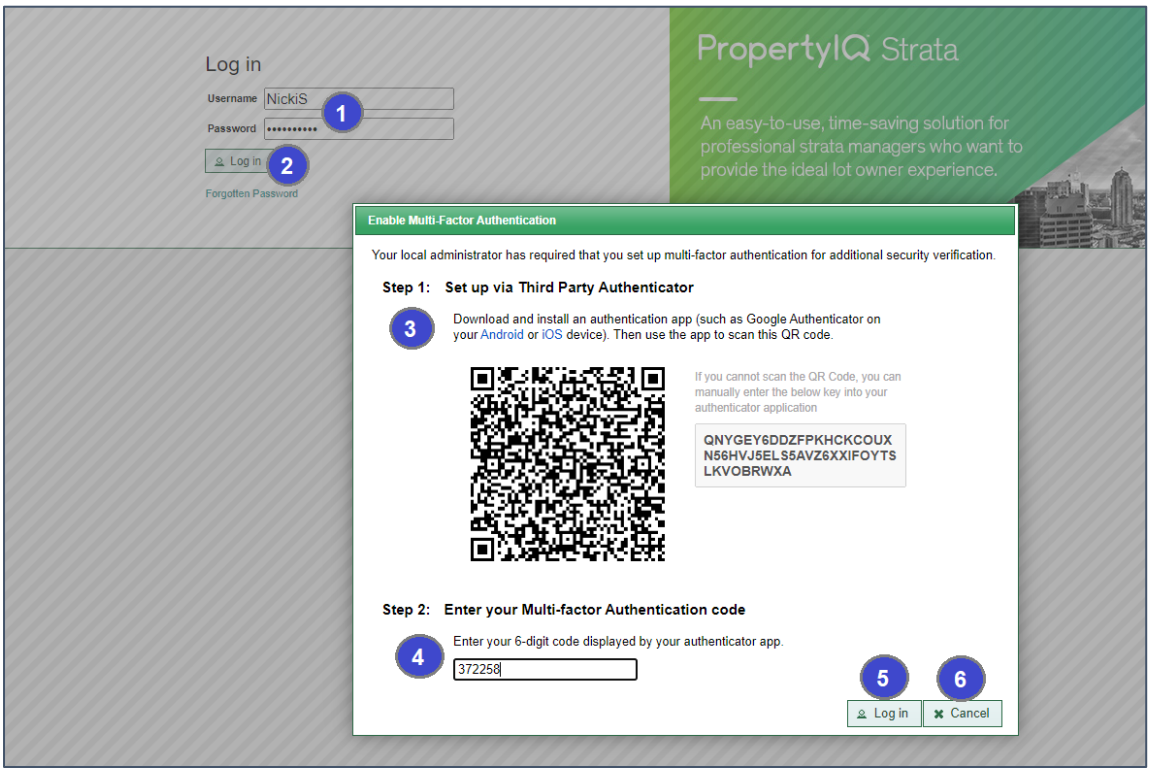
SETUP MFA ON USER'S NEXT LOGIN

1. Enter your Username and Password
2. Click the *Log In* button
3. ****This step is done outside of PropertyIQ****
   a. Use your Android or iOS mobile device and install an Authentication Application (such as *Google Authenticator*).
   b. Once this Authentication App is installed on your device, use it to scan the QR code shown on screen.
   c. Once successfully authenticated, you'll see a new account created in your Authentication App for PropertyIQ.
   *Example of Authentication App and new account created after successfully scanning the QR code (**example only, do not use**):*



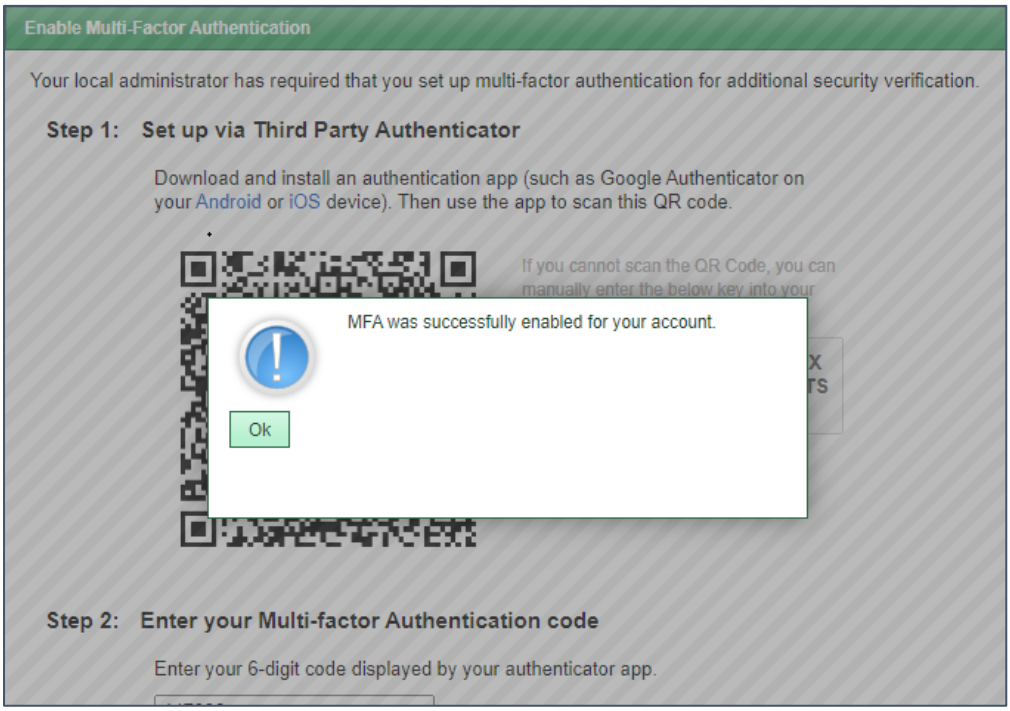
4. Enter the 6-digit code shown in your Authentication App.
   ***TIP**: The codes will refresh frequently. Use the code quickly or wait for a new code to appear. If you receive an error message that says the code is incorrect, use a new code (the next code that appears after refresh) from your Authentication App.*
5. Click the *Log In* button.
6. Click the *Cancel* button to return to the login screen.

NOTE: Your session will expire if you're inactive on the MFA screen for 15+ minutes. For an expired session, you'll see an error message that'll ask you to try again. You will need to repeat steps 1-5 above.



Once successfully authenticated, you will see a confirmation message to advise MFA has been enabled.

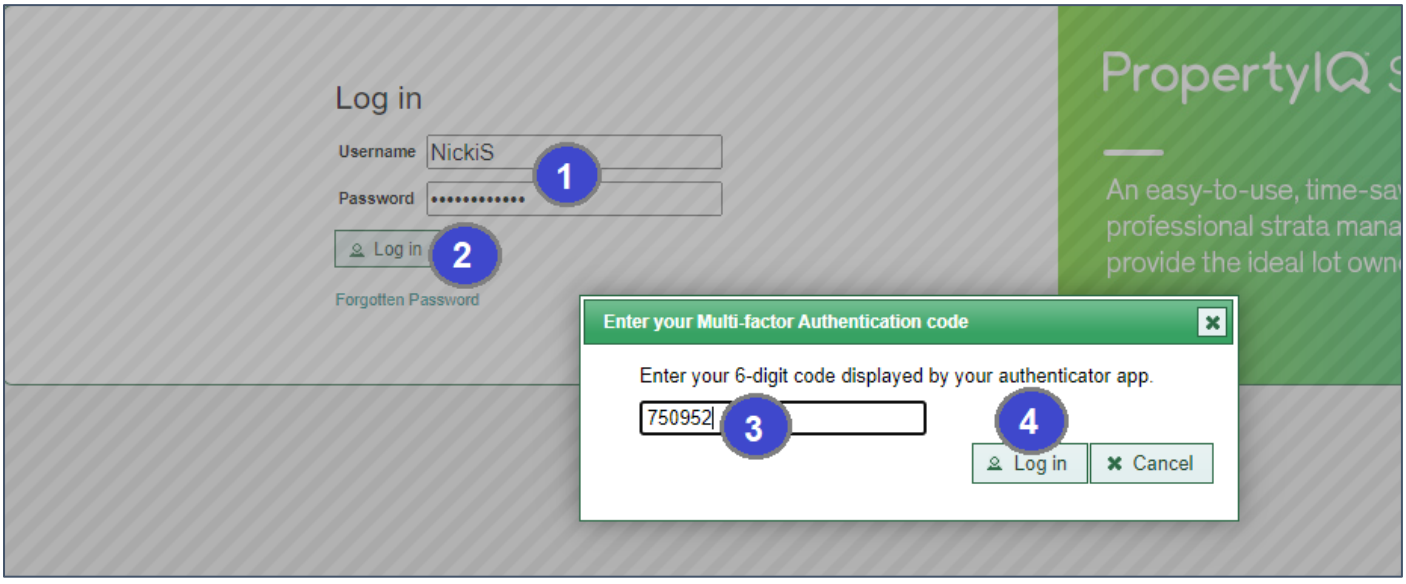
Once MFA is enabled, every time you log into PIQ you'll need to enter your Username, Password and a 6-digit code from your Authentication App. Refer Login with MFA.



LOGIN WITH MFA

1. Enter your Username and Password
2. Click the *Log In* button
3. Use your Android or iOS mobile device to open your Authentication App (the same App used to setup your initial MFA account in the above step *'Setup MFA on user's next login'*).
   Enter the 6-digit code shown in your Authentication App.
4. Click the *Log In* button

Once successfully authenticated, you'll be logged into PIQ.



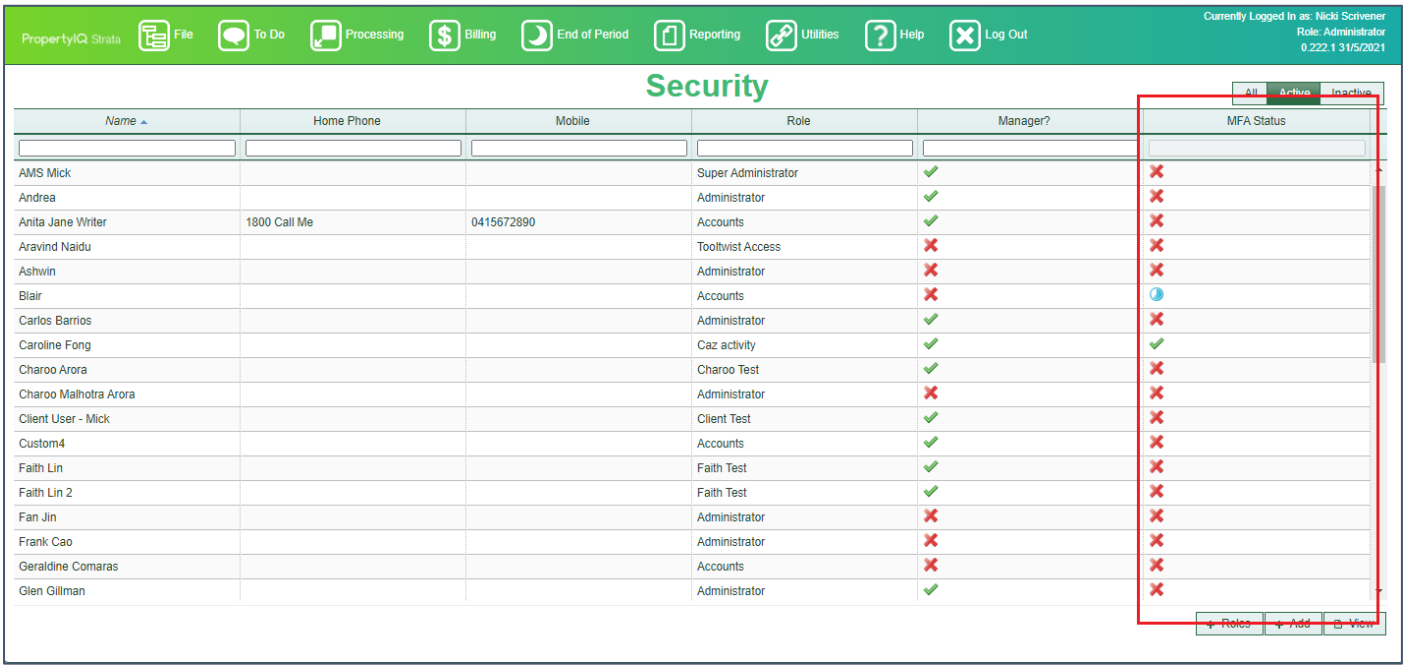
VIEW MFA STATUS OF USERS

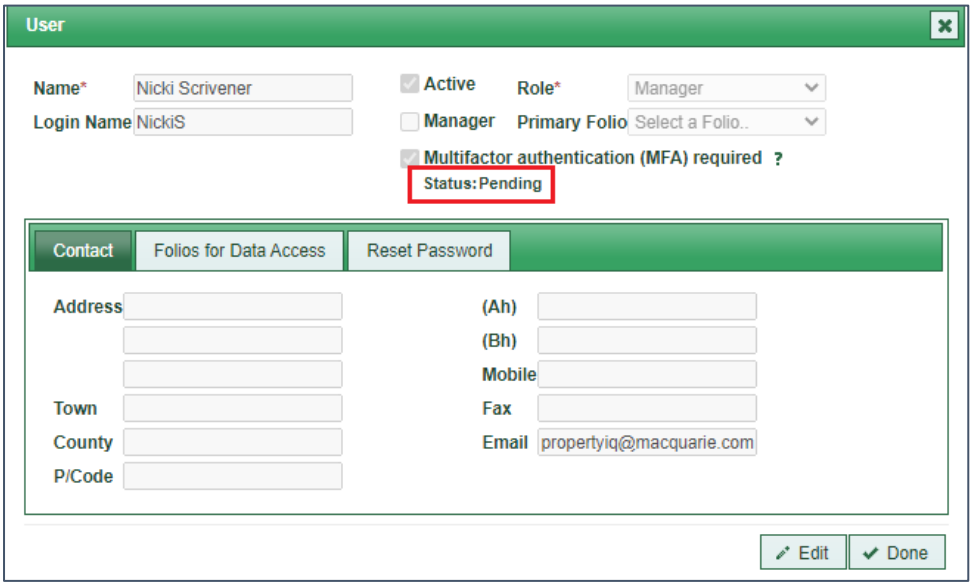
You can view the MFA status of users in two areas:

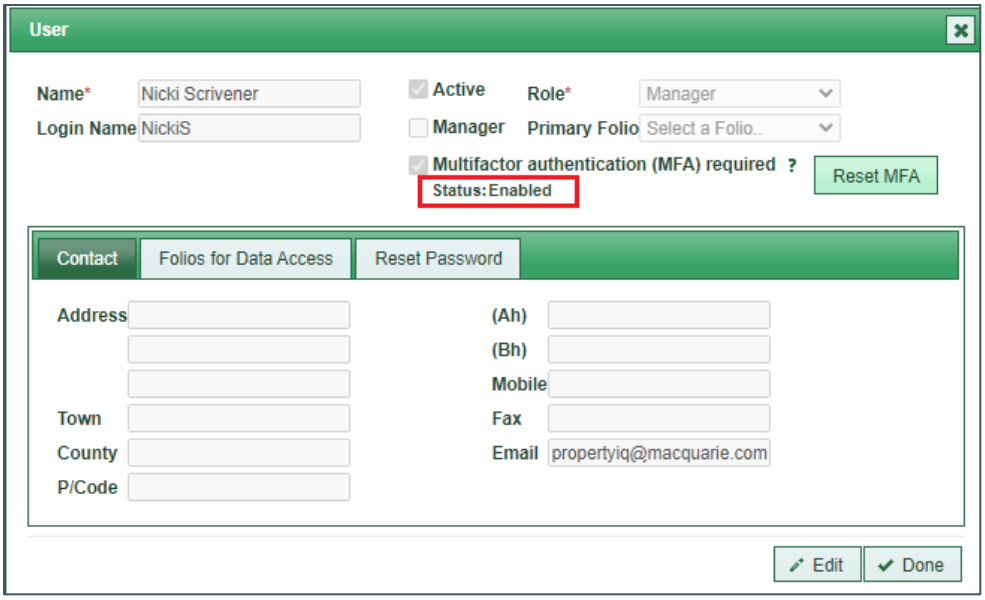
1. Utilities > Security > Users screen > **MFA Status column**
2. Utilities > Security > Users screen > **User card**

Status types

- ***(No status shown on user card)*** – MFA not enabled for the user
- ***Pending*** - MFA enabled, not yet setup by the user e.g. user has not logged in PIQ since MFA was enabled
- ***Enabled*** – MFA enabled, has been successfully setup by the user





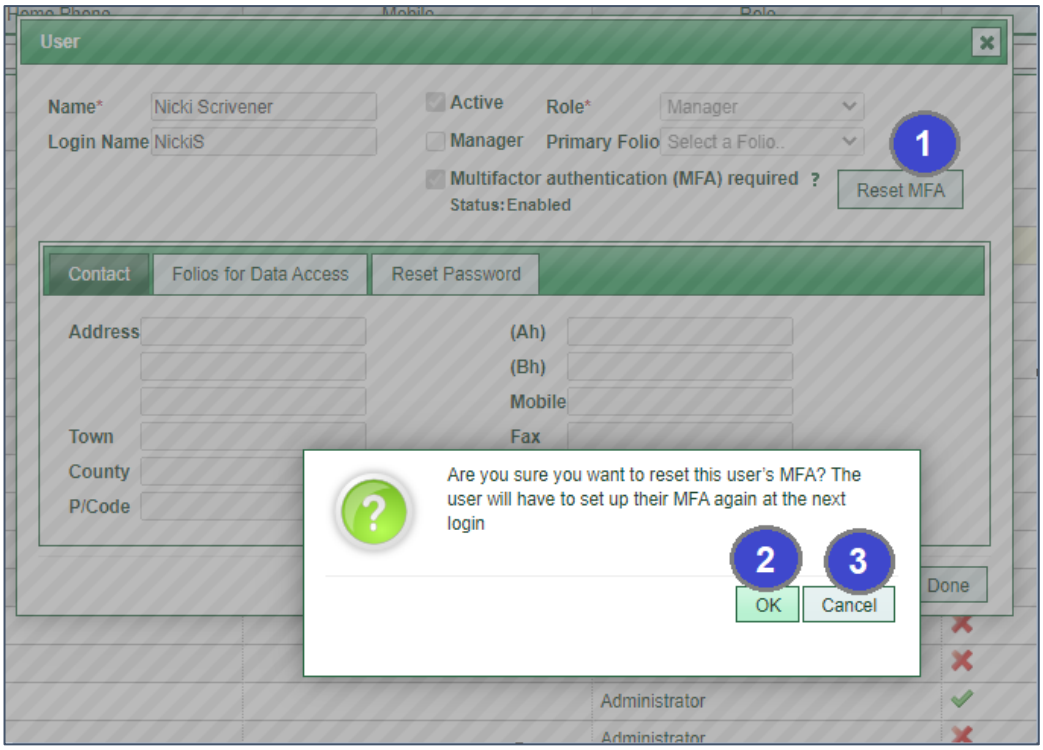


RESET MFA FOR USERS

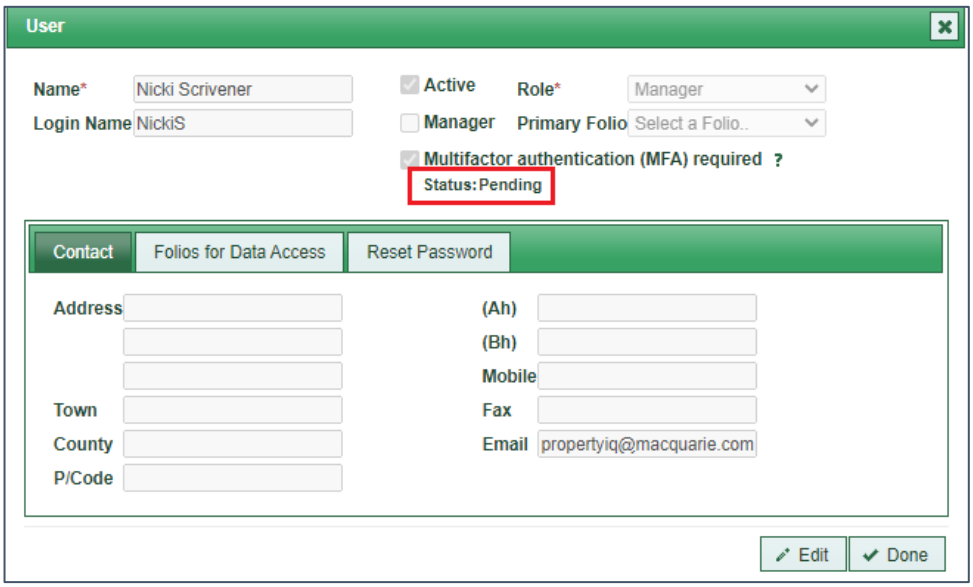
- There may be cases where MFA needs to be reset for a user that has MFA enabled.
  Example
  Where the user's mobile device is lost, damaged or inaccessible and the user is unable to access the Authentication App and retrieve a 6-digital code to login.
- **An *Administrator* with permission to edit users in your PropertyIQ can reset MFA on behalf of another user**.
- Once reset, that user can setup MFA again on a new device (refer instructions '*Setup MFA*').
- Follow the below instructions to reset MFA for a user.

Go to Utilities > Security screen > View the User card of the user that requires MFA to be reset.

1. Click *Reset MFA* button
   NOTE: *This button will only appear if MFA Status is 'Enabled'.*
2. Click *OK* to confirm and proceed with the reset
3. Click *Cancel* to return to the previous screen



4. Once reset has been completed, the user's MFA status will revert back to *Pending*.



5. The user will need to setup MFA again when they next login – **Repeat steps outlined in *Setup MFA on user's next login***

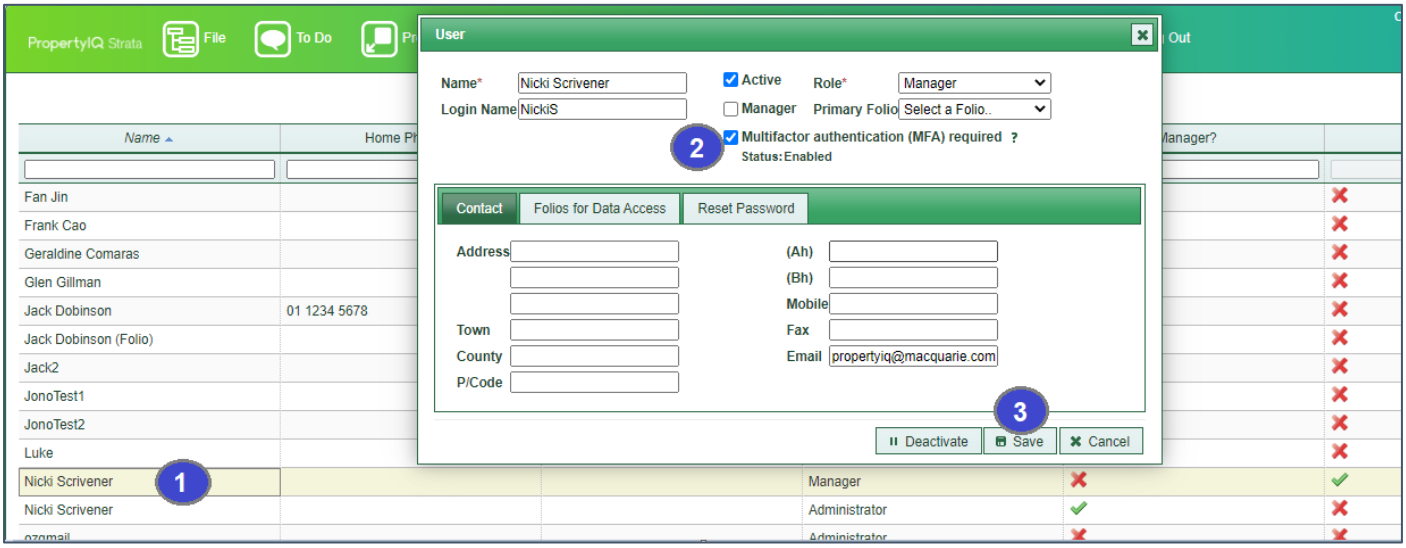
! ***IMPORTANT:*** The user must repeat the setup process again and **scan the new QR code**, which will create a new account in their Authentication App (with new authentication codes). The codes generated by their old authentication account (which is linked to the previous QR code) cannot be used.

DISABLE MFA FOR USERS

Once MFA has been enabled for a user, it can also be disabled if required.
As soon as MFA is disabled, the user will not be asked for a 6-digit authentication code when logging in.

Go to Utilities > Security screen.

1. View the User card of the user that requires MFA to be disabled
2. Untick the checkbox called *Multifactor authentication (MFA) required*
3. Click *Save* button

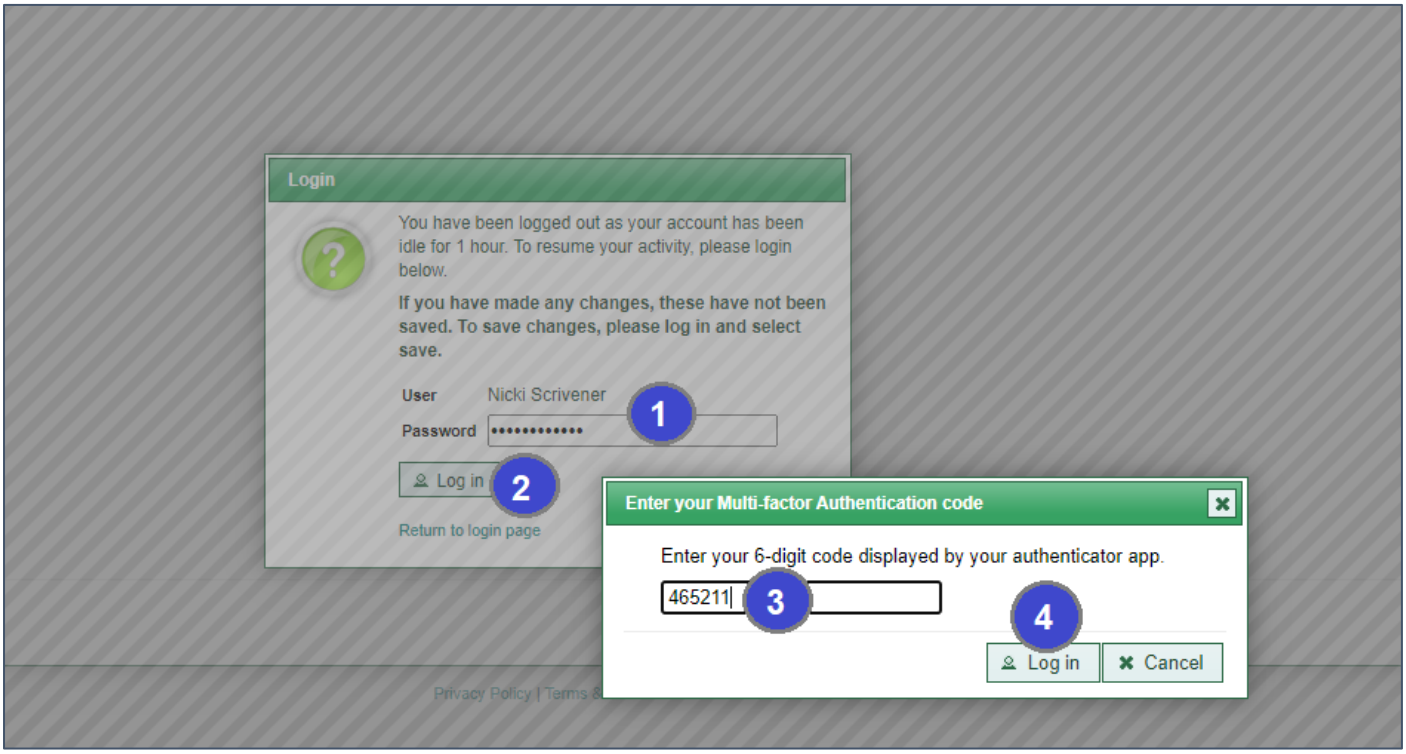


MFA DURING SESSION TIMEOUT

When you've been inactive in PropertyIQ for at least 1 hour, your session will expire and you'll be required to sign in again.

For users that have MFA enabled, when signing back into PropertyIQ after a session timeout, you'll be required to enter a 6-digit code (much the same as when logging in from the main login screen).

1. Enter your Username and Password
2. Click the *Log In* button
3. Use your Android or iOS mobile device to open your Authentication App (the same App used to setup your initial MFA account in the above step *'Setup MFA on user's next login'*).
   Enter the 6-digit code shown in your Authentication App.
4. Click the *Log In* button

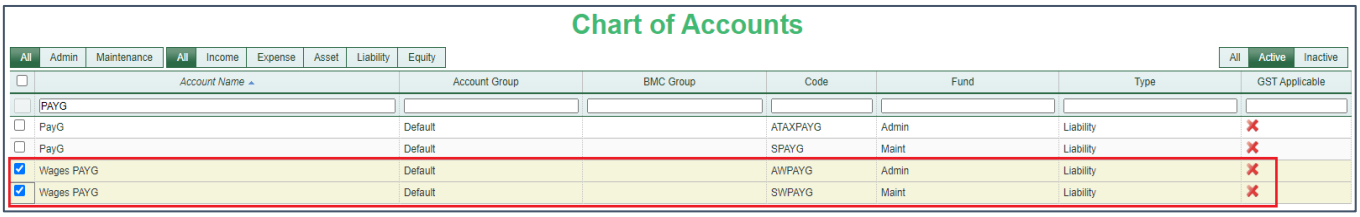


ITEM 9 – DEFAULT WAGES PAYG ACCOUNTS

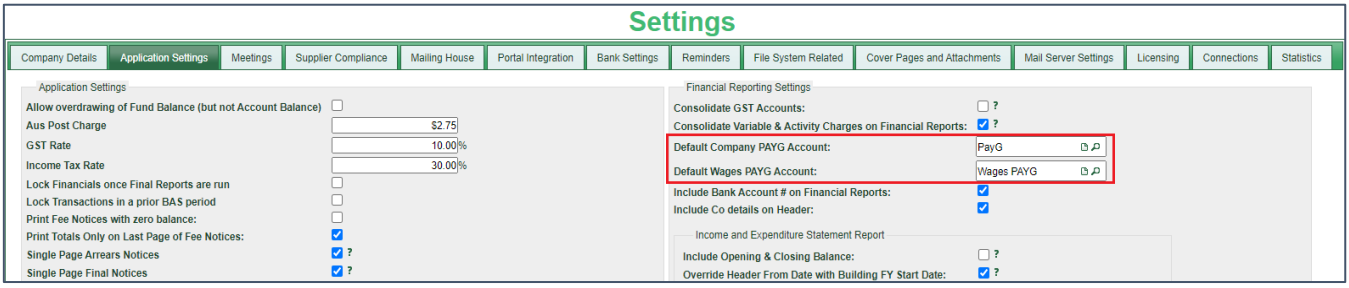
Two new default Wages PAYG accounts (Administrative Fund and Sinking/Capital/Reserve/Maintenance Fund) have been created and added to the default list of accounts in PropertyIQ.

You can now use the existing '*PAYG*' account for Company PAYG and the new '*Wages PAYG*' account for Wages PAYG, which will ensure transactions for the two types of PAYG are recorded separately for Income Tax purposes.

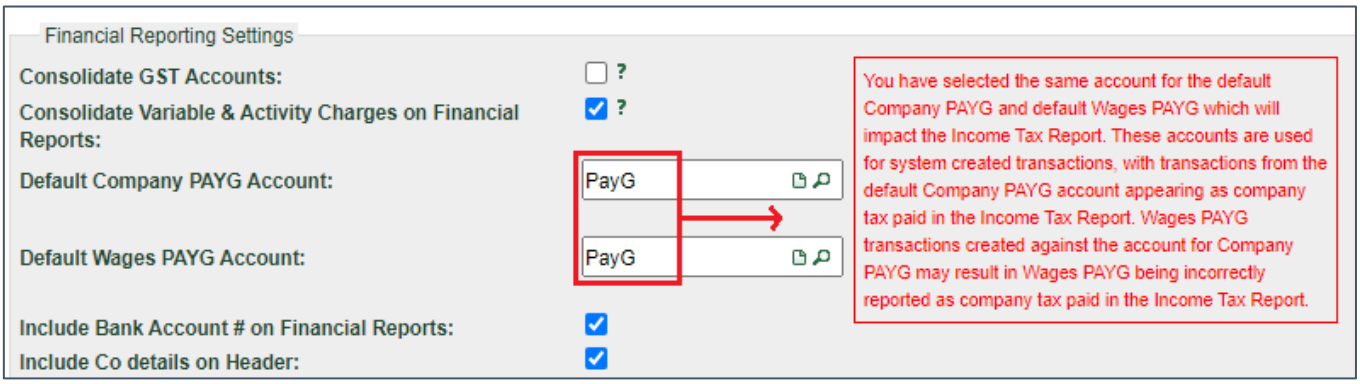
- **View the new default Wages PAYG accounts** (AF & SF) under *File > Chart of Accounts* list



- **Set or update your default PAYG accounts in Application settings** (used for BAS workflow & Income Tax Reporting) under *Utilities > Settings > Application Settings tab > Financial Reporting Settings* section



- **New validation when setting or updating your default PAYG accounts** under *Utilities > Settings > Application Settings tab > Financial Reporting Settings* section to ensure the *same* account isn't selected for both Company PAYG & Wages PAYG.



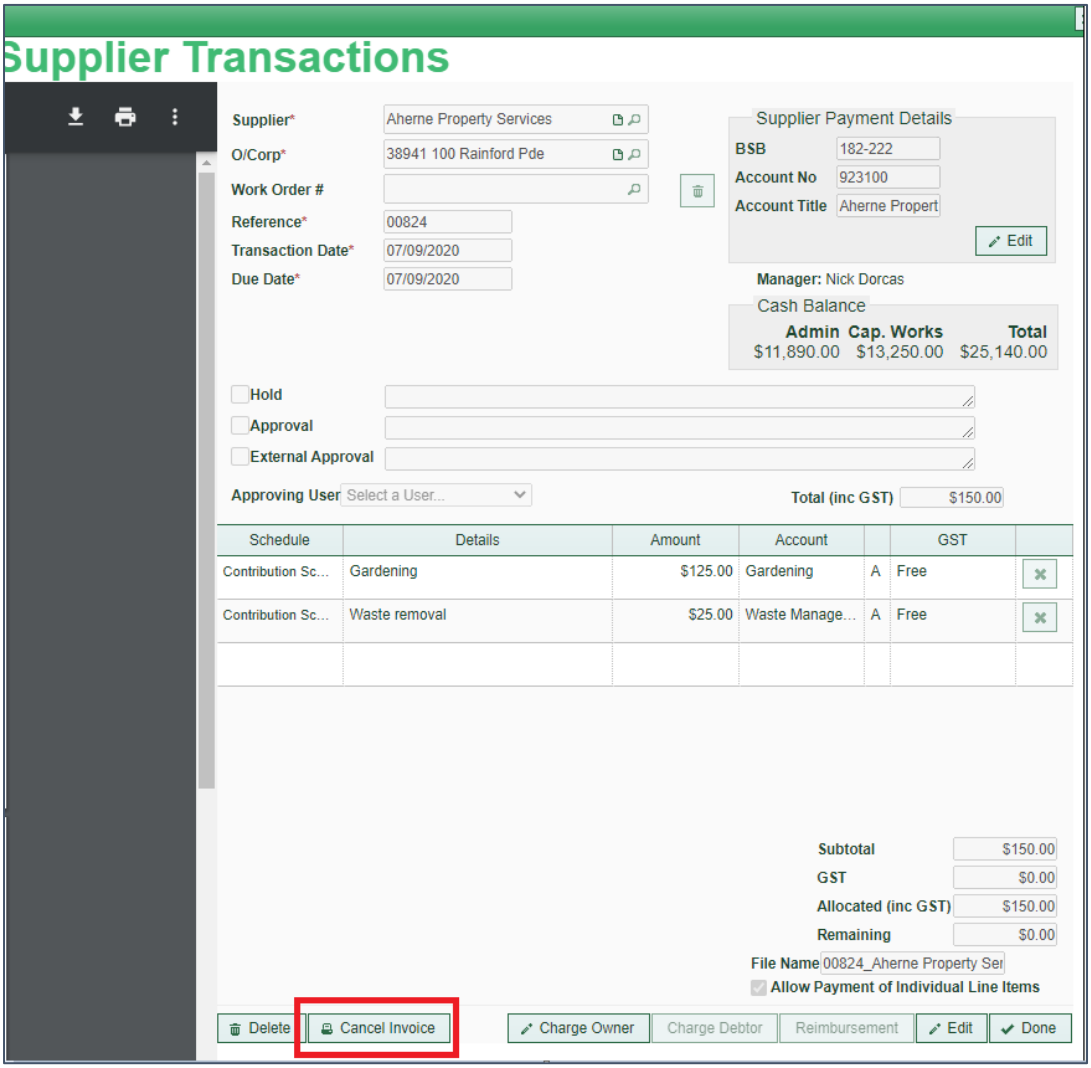
ITEM 10 - CANCELLATION OF PARTIALLY PAID SUPPLIER INVOICES

Improvements have been made to allow the cancellation of a partially paid supplier invoice so that the remaining unpaid amount can be removed from the system where it's unlikely that future payments and credit notes will be raised against the same supplier. Previously, only fully unpaid invoices could be cancelled using a credit note.

To cancel a partially paid supplier invoice, you can use the same process and functionality as is currently in place for a fully unpaid invoice, including:

- Using the *Cancel Invoice* button when viewing the invoice
- The creation of a reversal transaction (credit note) for the unpaid amount, using the same details as the original invoice
- Removal of the line item/s from the Supplier Payments screen upon cancellation
- Updated Supplier ledger to show the created credit note and the updated status of the invoice
- Updated Supplier ledger report to show the created credit note

For example, if you had an invoice totalling $100 that was split equally across 2 line items, you paid $50 and then cancelled the balance, in PropertyIQ against the Supplier's ledger you will see:

a) **Invoice** record totalling $100, with a status of paid
b) **Payment** record of $50 for the partially paid amount, with a status of paid
c) **Credit note** record of $50 for the cancelled amount, with a status of applied credit

Cancellation of a partially paid supplier invoice using the Cancel Invoice button: