PropertyIQ

Release Notes March 2021

PropertyIQ Version 0.218.1

TABLE OF CONTENTS

Table of Contents **1**

Summary **2**

Changes related to portal 2

Due/Fee & Special notices 2

Global & Folio attachments 2

General 3

Detailed screenshots **4**

Item 2 - New summary page for fee notices (VIC) 4

Item 4 – Global & folio attachments 6

Configure notice attachments 6

SUMMARY

CHANGES RELATED TO PORTAL

Changes in PropertyIQ

1. **Deleting emails registered for PIQ portal** – When deleting an email address for a lot owner or committee member that has been registered for PIQ portal, you will now see a warning message in PIQ that states that removing the email address will result in them being de-registered from portal. Upon proceeding, that lot and/or committee member will then be de-registered from portal on the next overnight sync.

   The warning will appear when:

   - There is only one (1) email address in the email field, and it is removed from
     - Building card > Info tab > Committee accordion > Committee card > Email field
     - Lot card > Owner info section > Email field

   IMPORTANT NOTE: If there is more than one (1) email address in the email field, and you only remove the first email address (which is used for portal registration), then the second email will then become the primary email for the associated portal account and behave as if an update to the email address was made.

DUE/FEE & SPECIAL NOTICES

2. **New summary page for fee notices (VIC)** - A new template called *VIC MBL Fee Notice Summary* is now available in the list of VIC default standard merge templates in PropertyIQ.

   - The template is enabled by default and will be used automatically when issuing 2 or more fee notices to one owner, providing a consolidated payable amount across schedules.
   - This summary page will appear after any fee notice cover page (if applicable) and before the fee notices.
   - The *VIC MBL Fee Notice Summary* template can be customised to suit your needs, as with the other templates.

   ***NOTE*:** No action is required from you.

   Refer detailed screenshots. For VIC clients, you can also view our guide to configuring notice templates here.

3. **Special levies** – Improvements have been made to the Special Levies screen and the behaviour of the 'Dont deliver' option. When striking a special levy and selecting the 'Dont Deliver' option, the system will create the levy on the lot's ledger but will no longer create the special notice document in the lot's documents tab.

   Any special levies must continue to be issued to the owner via the Billing > Due Notices screen (which will create the notice document), and this change ensures that the GST of special levies is correctly included and reported on the first due/fee notice issued to the owner. Previously, GST for special levies struck (with don't deliver option ticked) were not being included on the first due/fee notice issued to the owner, as the system was reporting the levy as previously issued due to the document being created from the Special Levies screen.

GLOBAL & FOLIO ATTACHMENTS

4. **Global & Folio attachments** - You can now configure attachments at a *Building, Folio or Global level* for fee, arrears, final and legal notices. Previously, attachments could only be configured for a single building. Any changes made to the global or folio attachments screen will be recorded in the global audit trail.

   - Global and Folio attachments can be configured under Utilities > Settings > Cover Pages & Attachments > Attachments section.
   - Building attachments can be configured under Building card > Documents tab > Notice Attachments/Cover pages button (as before).
   - You can configure and use **both** an attachment at the building level AND an attachment at the folio or global level.

- When using cover pages, summary pages and attachments for notices, the print order will be:
  - Cover page - global or building
  - Fee Notice Summary page (if applicable)
  - Notice/s – fee, arrears, final or legal
  - Attachments – building
  - Attachments – global or folio General

! ***TIP:*** Global and folio attachments can be used to ensure the required **VIC 'terms of notice' explanatory page** for notices is only included once at the end of the notice.

For detailed instructions, see *Configure notice attachments* below. For VIC clients, you can also view our guide to configuring notice templates and attachments here.

GENERAL

5. **Debtor invoices** – Improvements have been made to ensure a debtor invoice dated within a previous financial year cannot be deleted. The system will also check if the invoice is in a prior BAS period or within a final financial report when editing or deleting the invoice, and either warn or restrict users in accordance with the relevant application settings.
6. **Building Schedules** – You now have the ability to delete an **inactive** building schedule that has **no records** saved or created against it. On the building card > Schedules button > Schedule card screen, you will now see a *Delete* button for an inactive schedule AND where the user has the File>Buildings>Edit permission.
7. **Audit trail** – The global audit trail and the building log of changes now include changes to schedule details made under building card > Schedules button > Schedule card.
8. **Building export file** – A small change has been made to the 'quorum' field in the building export file. If there is no value entered on Building card > Settings tab > Meetings accordion > Quorum % field, the value shown in the 'quorum' field of building export file will be blank. Previously it was showing as 0.00%, which may be misleading.

ITEM 2 - NEW SUMMARY PAGE FOR FEE NOTICES (VIC)

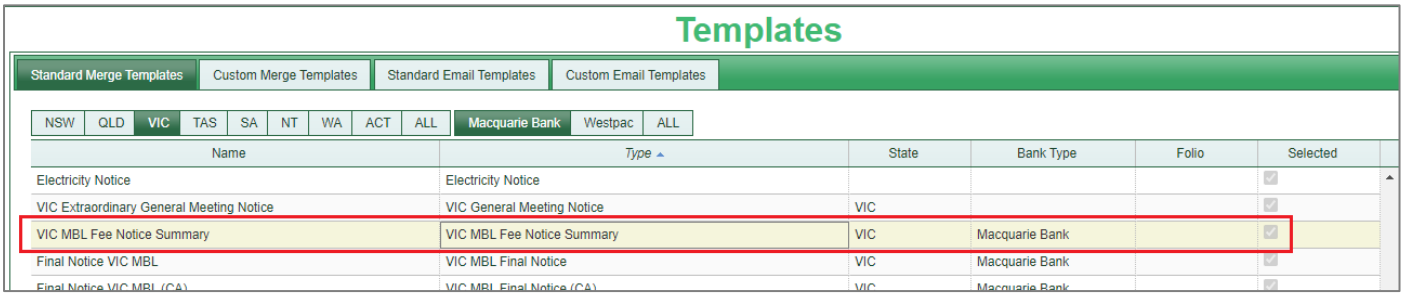
A new template called ***VIC MBL Fee Notice Summary*** is now available in the list of VIC default standard merge templates in PropertyIQ.

- The template is enabled by default and will be used automatically when issuing 2 or more fee notices to one owner, providing a consolidated payable amount across schedules.
- This summary page will appear after any fee notice cover page (if applicable) and before the fee notices.
- The *VIC MBL Fee Notice Summary* template can be customised to suit your needs, as with the other templates.

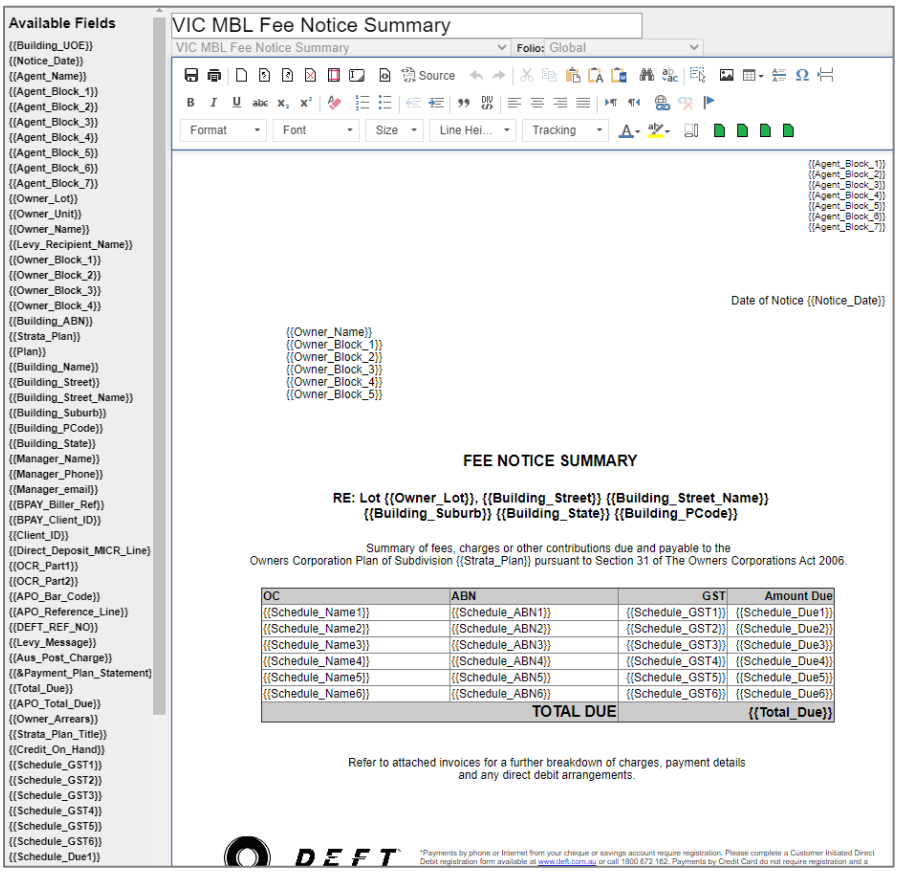
For VIC clients, you can view our guide to configuring notice templates and attachments here.

IMPORTANT NOTE: No action is required from you.

Available in template library:



Template:



Example summary page:

My Strata Co
ABN: 32 345 645
Level 20
111 Eagle Street
SYDNEY NSW 2000
Ph: 1313121
info@mystrata.com.au

Date of Notice 16/02/2021

Dr Hely Barstow and Dr Sebastian McClintock-Gulliver
1 Beverley Hills
owner address 2
owner address 3
SUBURB NSW 2773

FEE NOTICE SUMMARY

RE: Lot 1, HARVARD STREET
SYDNEY VIC 5000

Summary of fees, charges or other contributions due and payable to the
Owners Corporation Plan of Subdivision 333 pursuant to Section 31 of The Owners Corporations Act 2006.

OC	ABN	GST	Amount Due
OC1	11111111111	$90.91	$1,000.00
OC2	22222222222	$77.27	$850.00
OC3	33333333333	$63.64	$700.00
	TOTAL DUE		**$2,550.00**

Refer to attached invoices for a further breakdown of charges, payment details
and any direct debit arrangements.

MACQUARIE BANK

DEFT PAYMENT SYSTEMS

*Payments by phone or Internet from your cheque or savings account require registration. Please complete a Customer Initiated Direct Debit registration form available at www.deft.com.au or call 1800 672 162. Payments by Credit Card do not require registration and a surcharge may apply.

	Pay over the Internet from your Credit Card or pre-registered bank account at www.deft.com.au.	BPAY **Biller Code: 96503** **Ref: 123456780 00625**	**Account: HARVARD PLACE TRUST** **Owner: Dr Hely Barstow and Dr Sebastian McClintock-Gulliver** **OC: 333** **Lot No: 1**
	Pay by phone from your Credit Card or *pre-registered bank account. Call 1300 30 10 90 or Int ++61 2 8 232 7395	Contact your financial institution to make a BPAY payment from your cheque or savings account.	
	Pay by mailing this payment slip with your Cheque to: DEFT Payment Systems GPO Box 2174, Melbourne VIC 3001	POST billpay Pay in person at any Australia Post Office, using Cash, Cheque or EFTPOS. Payments made at Australia Post will incur a $2.75 DEFT processing fee	All Cheques must be made payable to: Harvard Place Trust
			Total Due $2,550.00 Total due if paying at Australia Post $2,552.75

*442 12345678 0 00625

DEFT Reference Number: 123456780 00625

ITEM 4 – GLOBAL & FOLIO ATTACHMENTS

You can now configure attachments at a *Building, Folio or Global level* for fee, arrears, final and legal notices. Previously, attachments could only be configured for a single building. Any changes made to the global or folio attachments screen will be recorded in the global audit trail.

- Global and Folio attachments can be configured under Utilities > Settings > Cover Pages & Attachments > Attachments section.
- Building attachments can be configured under Building card > Documents tab > Notice Attachments/Cover pages button (as before).
- You can configure and use **both** an attachment at the building level AND an attachment at the folio or global level.
- When using cover pages, summary pages and attachments for notices, the print order will be:
    - Cover page - global or building
    - Fee Notice Summary page (if applicable)
    - Notice/s – fee, arrears, final or legal
    - Attachments – building
    - Attachments – global or folio General

! ***TIP:*** Global and folio attachments can be used to ensure the required **VIC 'terms of notice' explanatory page** for notices is only included once at the end of the notice.

For VIC clients, you can view our guide to configuring notice templates and attachments here.

CONFIGURE NOTICE ATTACHMENTS

1. The document being used as an attachment must firstly be saved into your PIQ as a PDF document.
2. **For the VIC Terms of Notice** – download the PDF document here and save it into your PropertyIQ.
3. Once the document has been saved, proceed with the steps below
    - Building attachments
    - Folio attachments
    - Global attachments

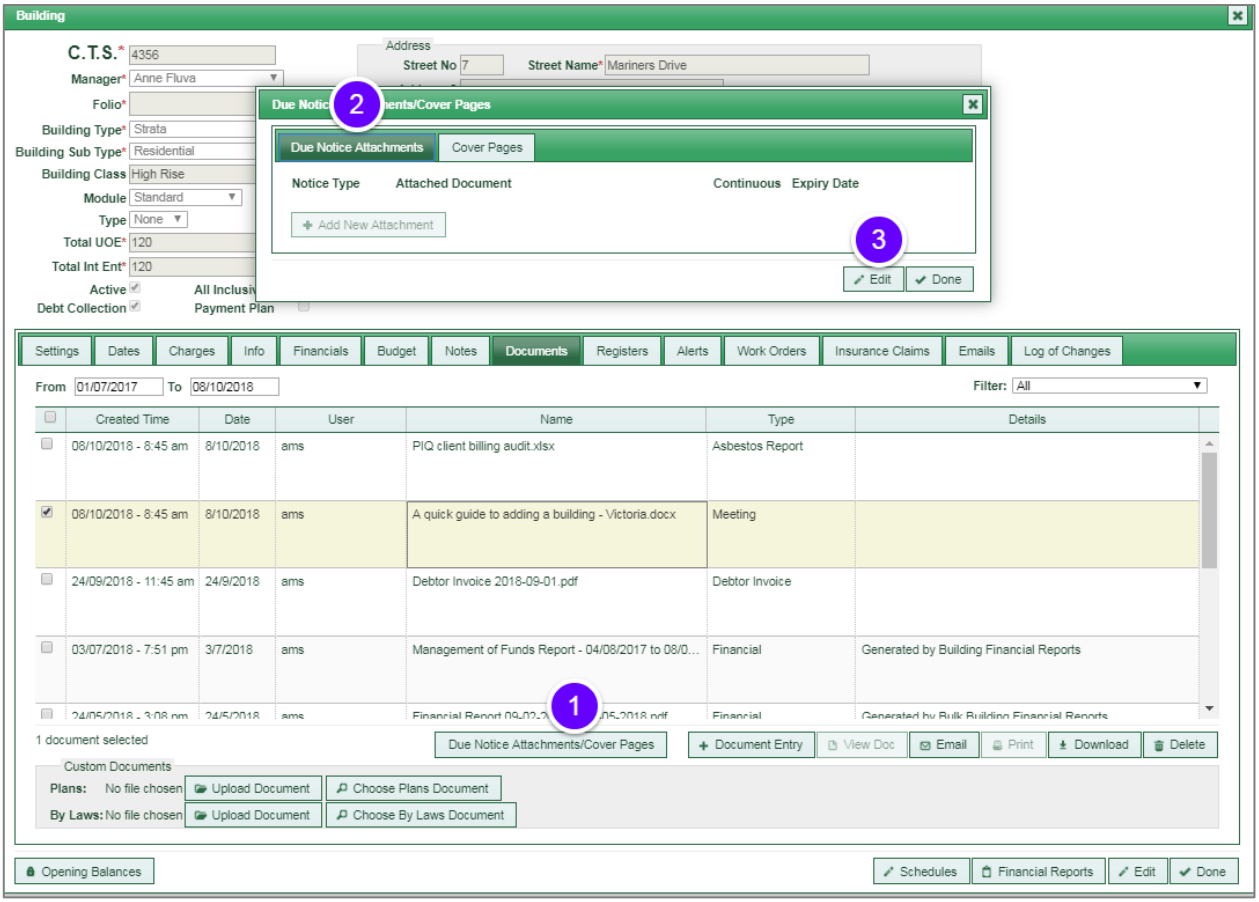
HINT: You can save a document as a 'global' document by linking it to a supplier (e.g. Managing Agent supplier) instead of a building.

For more detailed instructions on saving documents into PIQ, see the manual *Documents*.

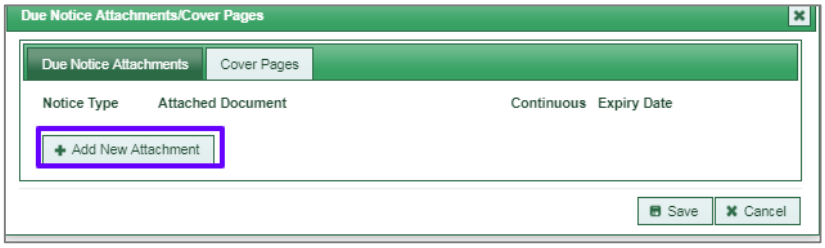
BUILDING

Go to File > Buildings > select building > Documents tab.

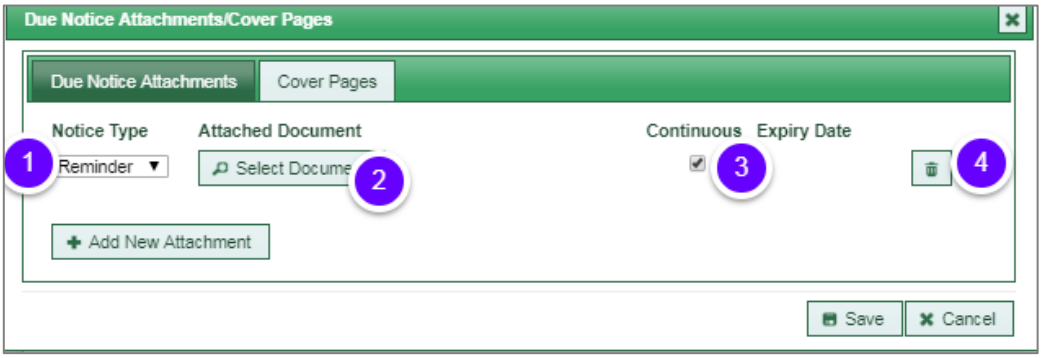
1. Select *Due Notice Attachments/Cover Pages*
2. Select *Due Notice Attachments*
3. Click *Edit*



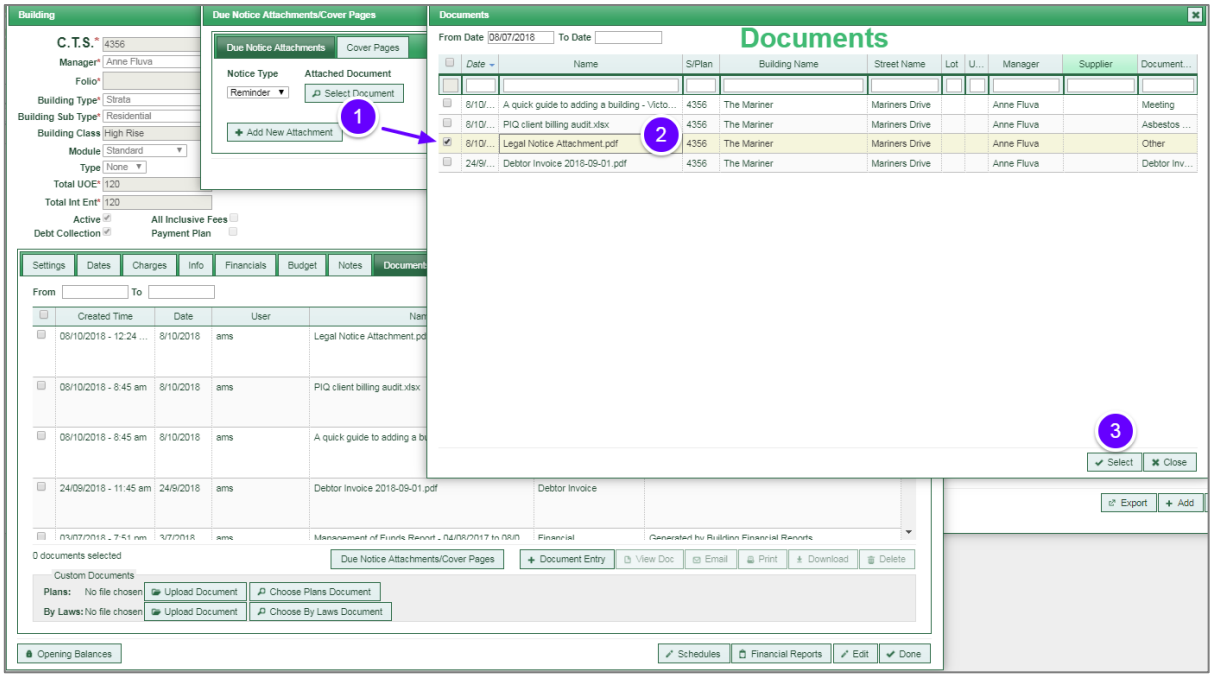
Click *+Add New Attachment*



1. Select the notice type you want to attach this document to. The choices are: reminder, arrears, legal and final
2. Select document to search for the document you want to attach
3. By default, the document will be attached continuously, but you can untick to select an expiry date
4. You can delete the attachment here



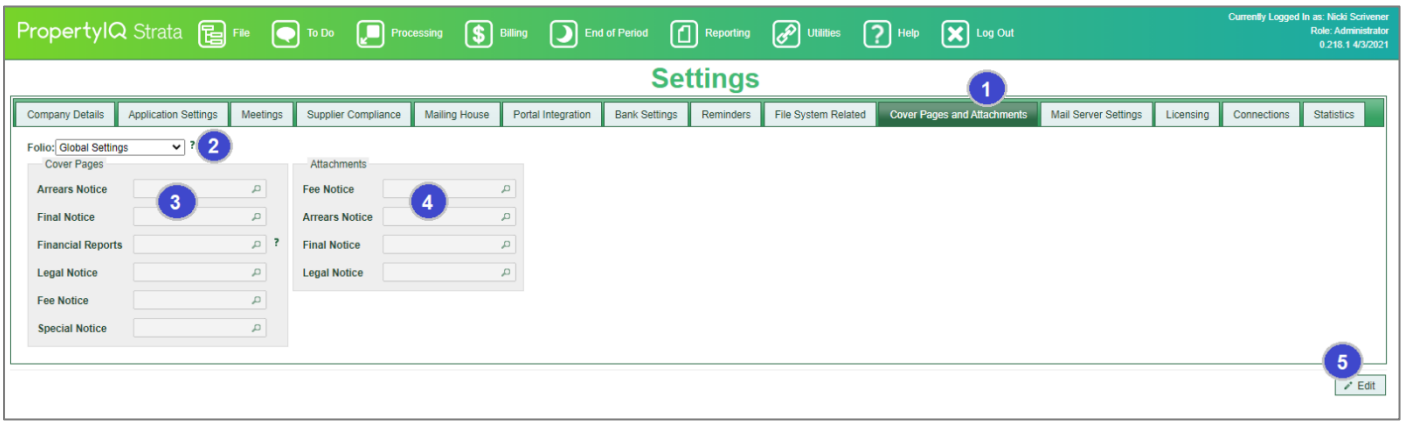
1. Select Document opens the building's document tab
2. Select the document you want to view
3. Click *Select*



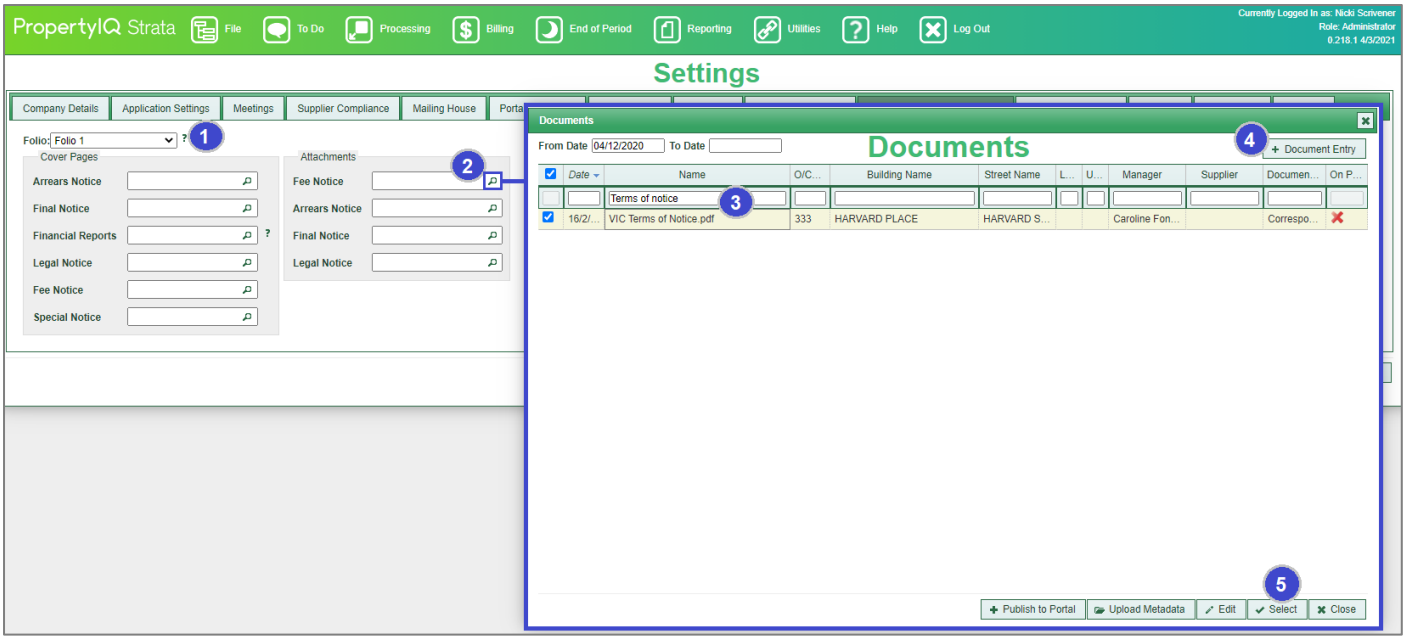
FOLIO

Go to Utilities > Settings screen

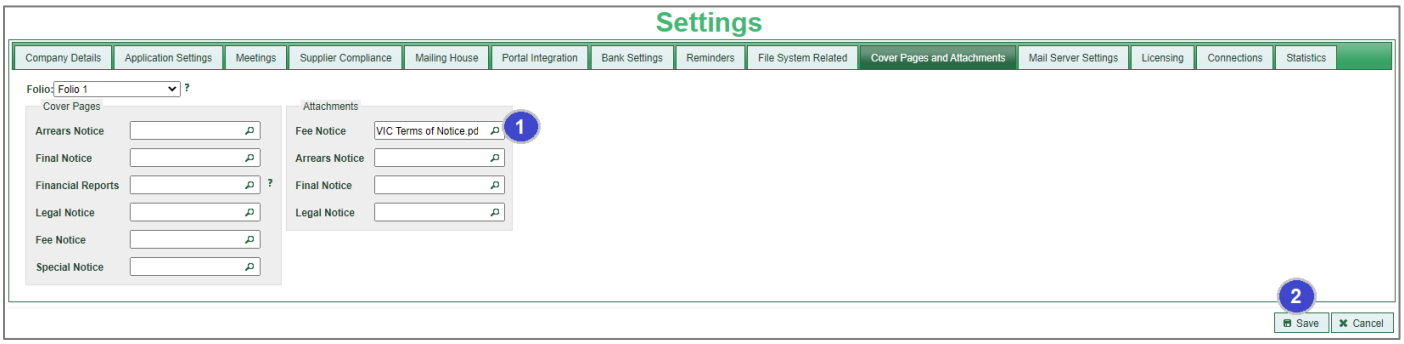
1. Select *Cover Pages and Attachments* tab
2. View Global or Folio settings using the dropdown
3. View and configure cover pages here
4. View and configure attachments here
5. Select Edit to configure your attachments



1. Select the Folio you want the attachment to be applied to
2. Select the search icon for the notice type you want the attachment applied to
3. If the document is already saved in PIQ, search and select it from the list
4. If the document is not yet saved into PIQ, upload and save the document from your local computer using the *+Document Entry* button
5. Once the document is selected, click the *Select* button



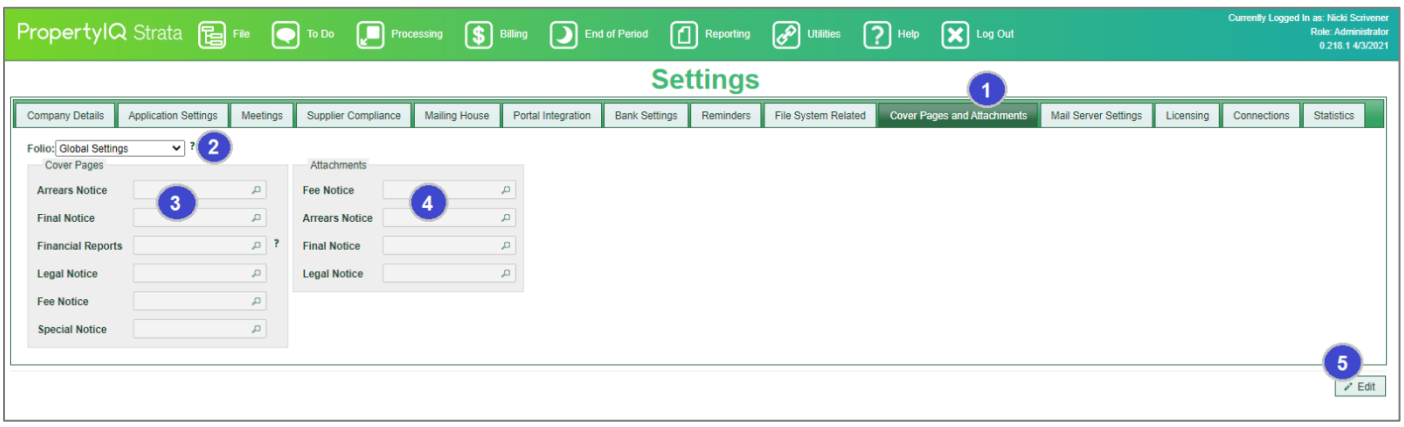
1. The selected attachment will appear here
2. Select *Save* to save the changes and apply the attachment



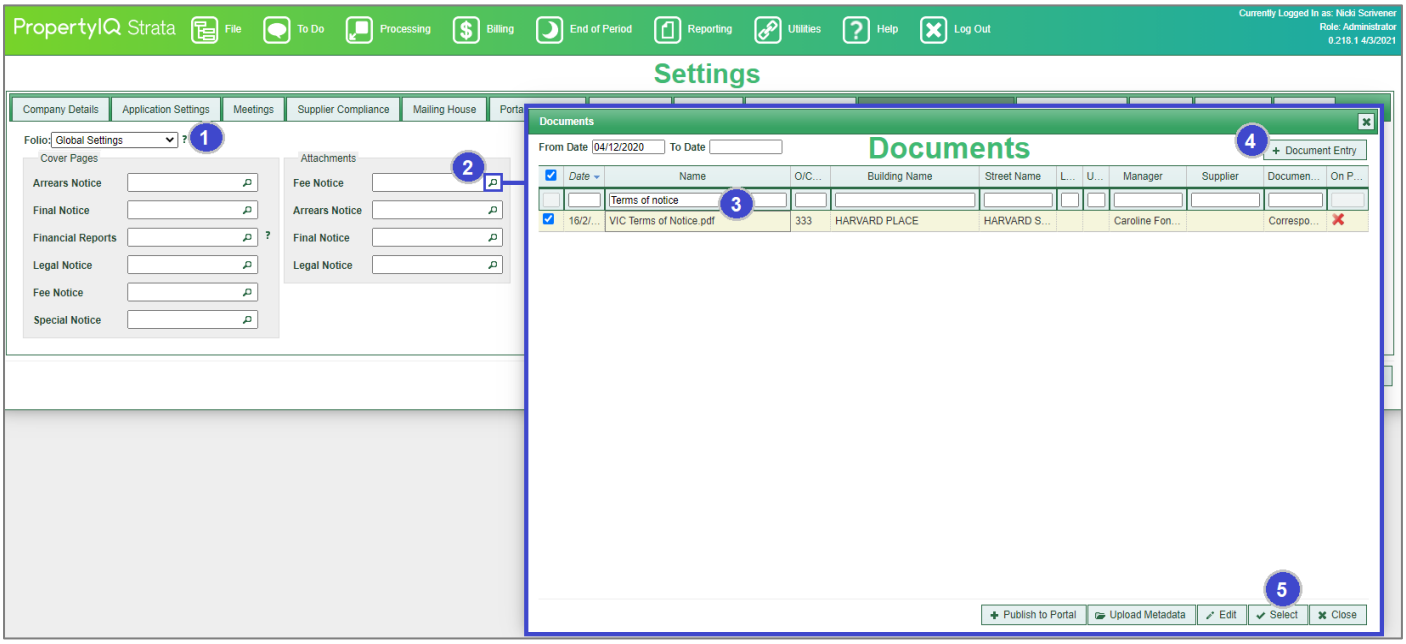
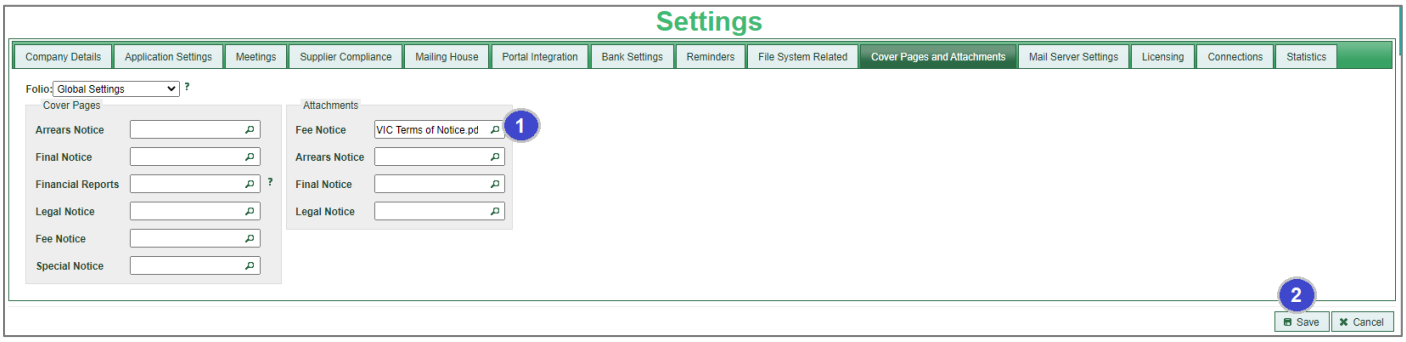
GLOBAL

Go to Utilities > Settings screen

1. Select *Cover Pages and Attachments* tab
2. View Global or Folio settings using the dropdown
3. View and configure cover pages here
4. View and configure attachments here
5. Select Edit to configure your attachments



1. Ensure *Global Settings* remains selected
2. Select the search icon for the notice type you want the attachment applied to
3. If the document is already saved in PIQ, search and select it from the list
4. If the document is not yet saved into PIQ, upload and save the document from your local computer using the *+Document Entry* button
5. Once the document is selected, click the *Select* button



1. The selected attachment will appear here
2. Select *Save* to save the changes and apply the attachment