PropertyIQ

# Release notes May 2020

## Version 197.0-198.0

## TABLE OF CONTENTS


Table of Contents ..... 1

Summary ..... 2

- Changes in PropertyIQ related to Portal V2 ..... 2
- Debtors card - note function ..... 2
- Security – Roles and permissions – debtor Notes ..... 2
- Diary – ability to assign a debtor to a diary event ..... 2
- Audit trail – more information now captured ..... 2
- Fee schedules ..... 2
- Templates ..... 2

Detailed screenshots ..... 2

- Item 3 – Portal V2 – changes to the untick auto publish function ..... 3
- Debtors – Debtor note function ..... 4
- Security – Roles and permissions – debtor Notes ..... 5
- Diary – ability to assign a debtor to a diary event ..... 6
- Fee Schedules ..... 7

# SUMMARY

## CHANGES IN PROPERTYIQ RELATED TO PORTAL V2

1. **Changes to factors determining whether a document shows as *On Portal*** - The factors determining whether a document shows as *On Portal* on the documents screen and in the documents tab of the lot card and/or building card have been updated to reflect more correctly. For example
   - If the document is set to auto publish to the committee but there are no committee accounts active for that building, the *On Portal* status will be no - this shows as a red "X"
   - If the document is set to auto publish to lot owners but there are no lot owner accounts active for that building.
2. **Changes to auto publishing rules**. When a document that was previously set to auto publish for lot owner and/or committee member accounts =is subsequently unticked to *auto publish* to either committee members, lot owners or both – all documents of that type that were previously published to the portal will be removed from the selected portal account type. See detailed screenshots below.

## DEBTORS CARD - NOTE FUNCTION

3. The debtor's card now has a notes function – users with the relevant permissions will be able to view, add, edit and print notes on a debtor card. See the detailed screenshots below.

## SECURITY – ROLES AND PERMISSIONS – DEBTOR NOTES

4. there is a new permission to allow users to view, add edit or delete notes made on a debtor card. Administrators have this permission by default, but you can edit other roles in your company to add these permissions. See detailed screenshot below.

## DIARY – ABILITY TO ASSIGN A DEBTOR TO A DIARY EVENT

5. Events created in the diary can now be assigned to a debtor. See detailed screenshot below

## AUDIT TRAIL – MORE INFORMATION NOW CAPTURED

6. When a user changes their PropertyIQ password, it is now recorded in the audit trail. The details of the change (but not the actual password) are shown in the audit trail.
7. When an administrator or a support team administrator changes the permissions for a role in a PIQ database, the change is now recorded in the audit log.
8. When a user creates a new role in a PIQ database, the detail is now recorded in the audit log.

## FEE SCHEDULES

9. **Managing agent invoice improvements** – The invoice to the managing agent that is automatically generated as part of the fee schedules process has had some improvements. See detailed screenshot below

## TEMPLATES

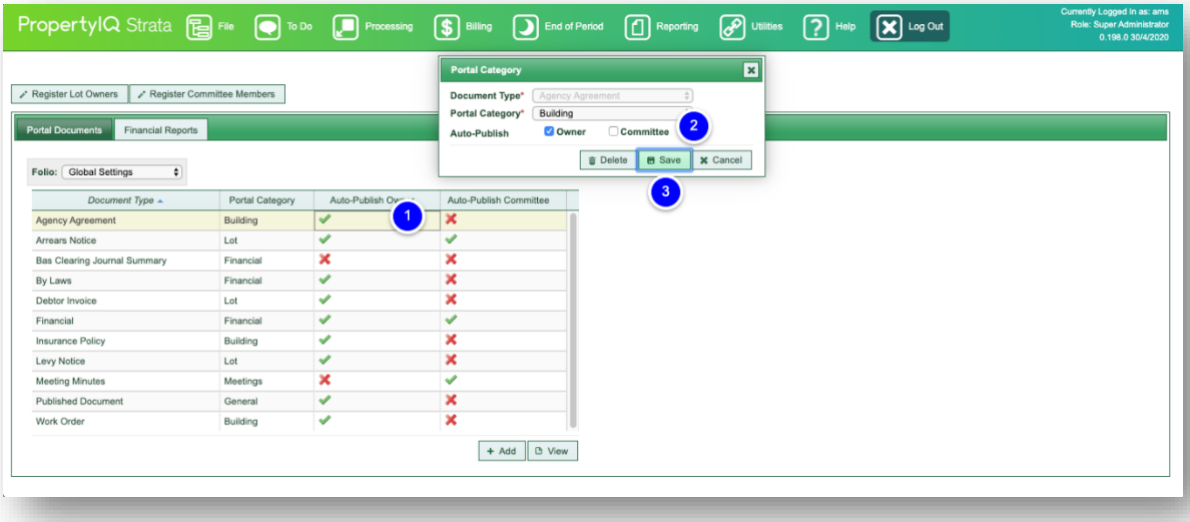
10. **Merge fields** An issue that was causing the state to appear in lower case. (for example nsw instead of NSW) when ysing the committee_block merge fields, has now been fixed.

# DETAILED SCREENSHOTS

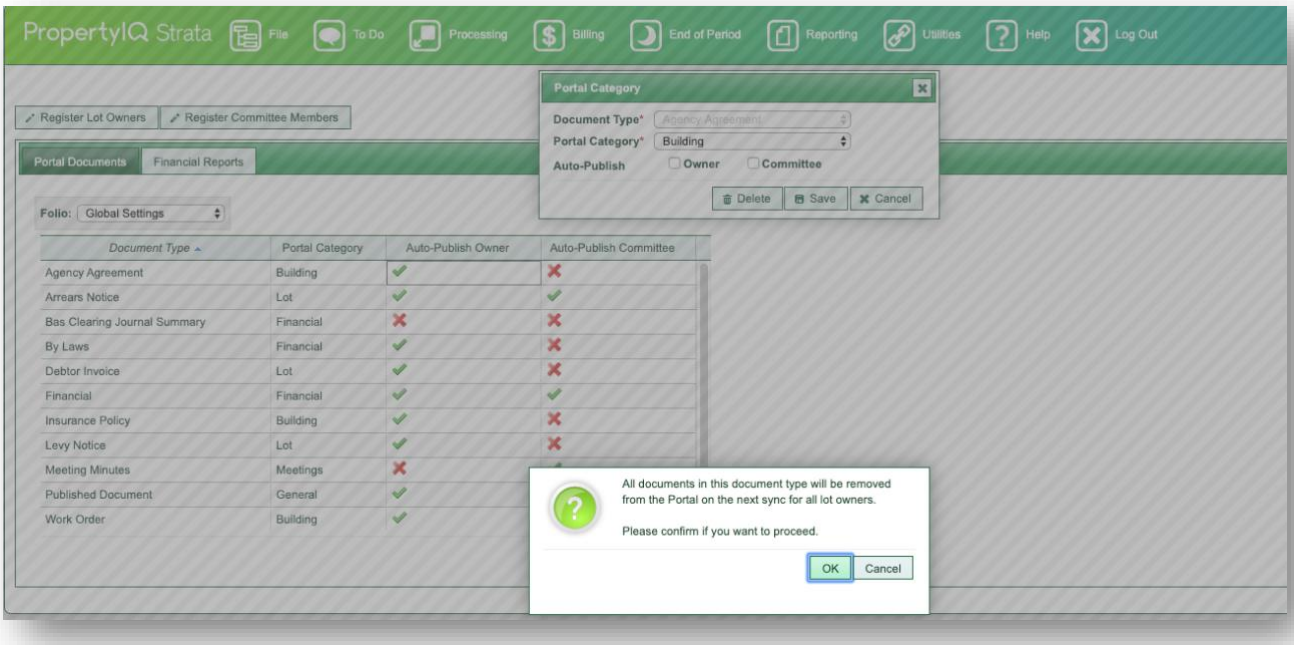
## ITEM 2 – PORTAL V2 – CHANGES TO THE UNTICK AUTO PUBLISH FUNCTION

Changes to auto publishing rules. When a document that was previously set to auto publish for lot owner and/or committee member accounts is subsequently unticked to *auto publish* to either committee members, lot owners or both – all documents of that type that were previously published to the portal will be removed from the selected portal account type.

1. From the Portal control panel, select the document type you want to unpublish
2. Untick the account type you want to unpublish for – Owner, committee or both
3. *Save*



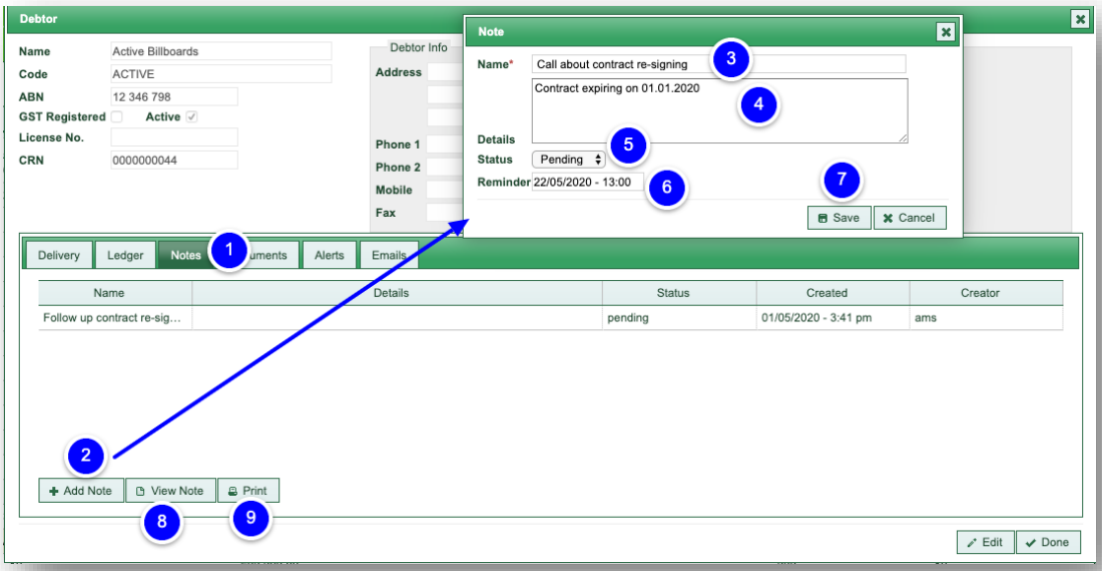

You'll receive a notification that all documents of that type will be removed from the selected portal account types. Click Ok to confirm you want to proceed.



## ITEM 3 - DEBTORS – DEBTOR NOTE FUNCTION

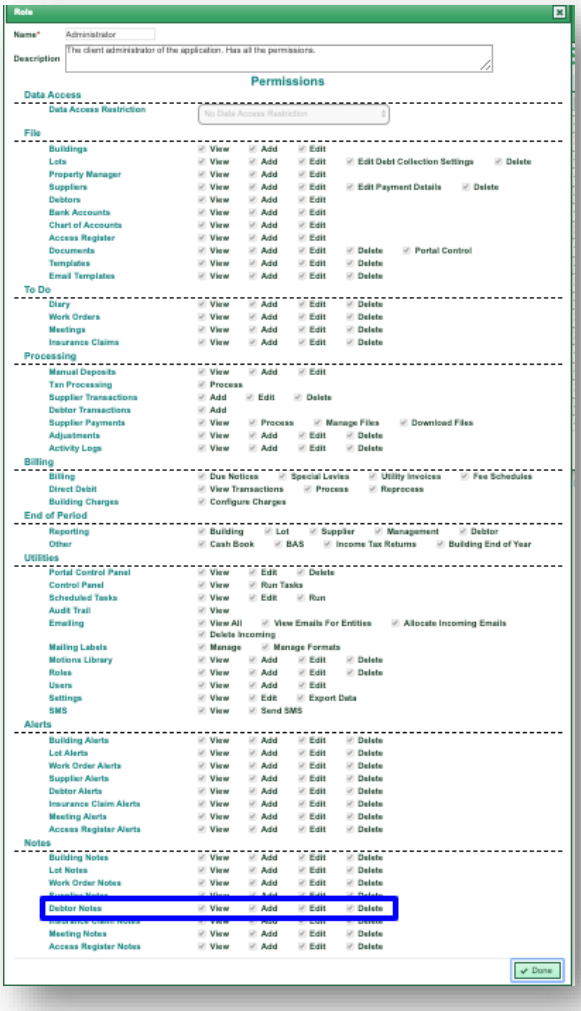
The debtor's card now has a notes function – users with the relevant permissions will be able to view, add, edit and print notes on a debtor card.

1. Click on the Notes tab to add, view or edit notes
2. Click *+Add* to add a new note
3. Enter a name for the note
4. Enter details (optional)
5. Select completed if you just want to record a completed action or note. Select pending if you want to create a diary reminder
6. Click in the reminder box to open the calendar and select a date and time for the note to appear in the diary
7. *Save*
8. Click on an existing note and click view to open and view/edit the note
9. *Print* to create a PDF document showing all notes for the debtor



## ITEM 4 - SECURITY – ROLES AND PERMISSIONS – DEBTOR NOTES

There is a new permission to allow users to view, add edit or delete notes made on a debtor card.

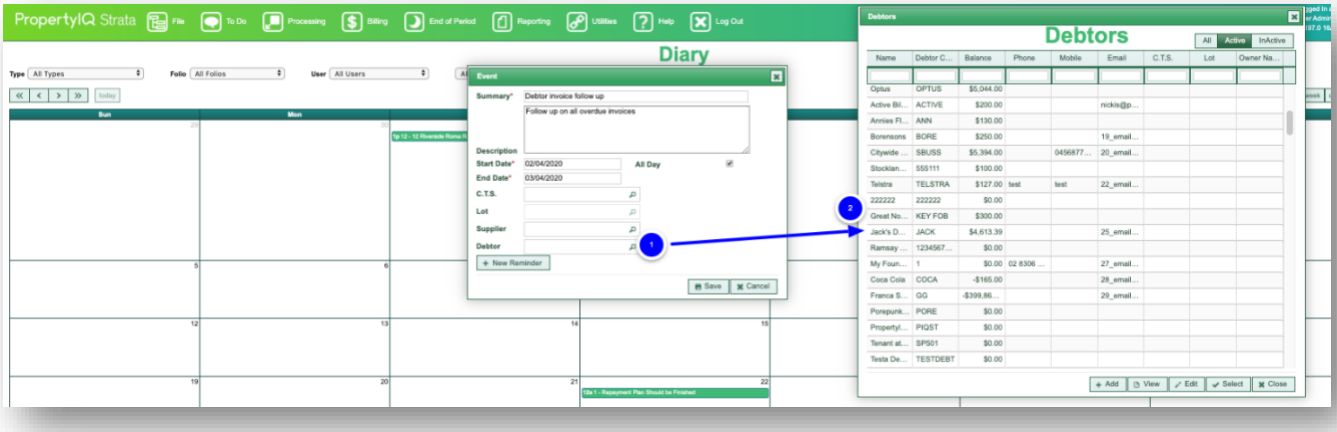


## ITEM 5 - DIARY – ABILITY TO ASSIGN A DEBTOR TO A DIARY EVENT

Events created in the diary can now be assigned to a debtor.

Add a new task or select an existing task from the Diary screen

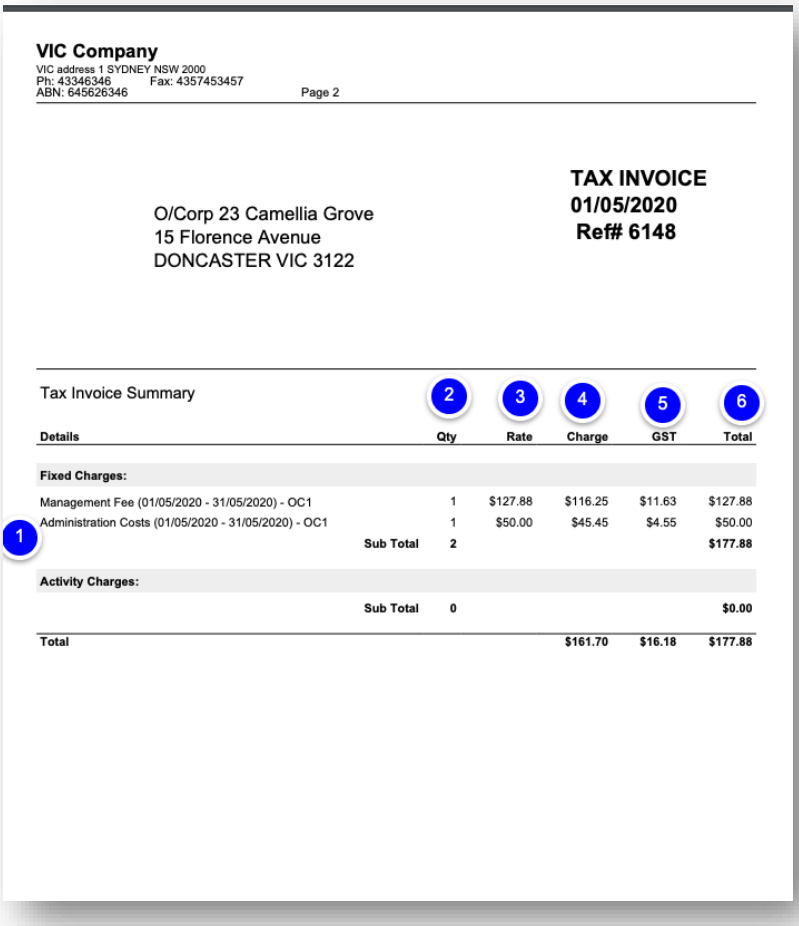
1. Click on the search icon next to *Debtor*
2. Select the debtor you want to allocate to the task from your debtors list



## ITEM 9 - FEE SCHEDULES

Managing agent invoice improvements – The invoice to the managing agent that is automatically generated as part of the fee schedules process has had some improvements.

1. There are two sections –
    - Fixed charges, which includes Management fees and fixed sundry charges
    - Activity charges,  which includes activity log charges and variable charges
2. The quanity column shows how many of each item is being invoiced
3. The rate per item shows here
4. The total charge for that item shows here
5. GST shows here
6. The total including GST shows here



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**TAX INVOICE**
**01/05/2020**
**Ref# 6148**

O/Corp 23 Camellia Grove
15 Florence Avenue
DONCASTER VIC 3122

Tax Invoice Summary

| Details | | Qty | Rate | Charge | GST | Total |
|---|---|---|---|---|---|---|
| **Fixed Charges:** | | | | | | |
| Management Fee (01/05/2020 - 31/05/2020) - OC1 | | 1 | $127.88 | $116.25 | $11.63 | $127.88 |
| Administration Costs (01/05/2020 - 31/05/2020) - OC1 | | 1 | $50.00 | $45.45 | $4.55 | $50.00 |
| | **Sub Total** | **2** | | | | **$177.88** |
| **Activity Charges:** | | | | | | |
| | **Sub Total** | **0** | | | | **$0.00** |
| **Total** | | | | **$161.70** | **$16.18** | **$177.88** |