PropertyIQ

# Release notes September 2019

## Version 182.0-183.1

## TABLE OF CONTENTS


Table of Contents ..... 1

Summary ..... 1

**Highlights** ..... 1

Debt Collection V2 ..... 1

Steps to enable Debt Collection V2 ..... 2

Templates ..... 2

Buildings ..... 2

Information Certificates ..... 3

Meetings ..... 3

Diary ..... 3

Supplier Payments ..... 3

Reporting ..... 3

Receipting ..... 3

Detailed Screenshots ..... 4

Register Reports ..... 4

Register reports can be a selected and attached to information certificates ..... 5

Register Reports - NSW Building ..... 7


## SUMMARY

### HIGHLIGHTS

#### DEBT COLLECTION V2

1. An improved process for the configuration and sending of arrears, final and legal notices is now available.

Some of the advantages of Debt Collection V2 are:

- You can set up default debt collection settings for Arrears, Final and Legal notices at a global or folio level to ensure consistency and to remove the need to enter criteria every time you process a due notices run.
- Debt collection stages have been introduced, so that a lot can only be in one stage at a given time.
- You now have the option to force notices to be issued sequentially. For example, you can select that a lot owner must have received an arrears notice before they are included in a final or legal notice run. This means that lot owners don't receive multiple notices (and charges) of the same type.

- The arrears report now includes the lot's stage and debt collection notes.
- You can now exclude an individual lot from debt collection even if the building the lot belongs to is ticked for debt collection

## STEPS TO ENABLE DEBT COLLECTION V2

There are two steps to enable Debt Collection V2

Attend a training session which covers the new debt collection process and explains the choices for the initial setting of lot owner arrears status. (auto set debt collection)

Once you have completed training you will need to email support@propertyiq.com.au

i. confirming you want to enable Debt Collection V2
ii. advising whether you want auto set debt collection enabled or not

View the Debt Collection V2 manual here

Register to attend Debt Collection V2 training here

## TEMPLATES

2. **More merge fields available to cater for buildings with multiple insurance policies.** There are now extra merge fields available so that up to 30 insurance policies can now be shown on:
   - Information certificates for all states and territories
   - Meeting notices and meeting minutes for all types of meetings
   - Motions library
   - Custom merge templates

## BUILDINGS

3. **Building Card>Registers tab.** When printing the register reports from the Building Card>Registers Tab, if no text is entered for a register, the PDF report that is produced now clearly shows Nil to make it clear that there are no entries for that item. This applies to:
   - Assets Register
   - Authorisations affecting Lots
   - Common authorisations
   - Compliance register
   - Contracts register
   - Common rights property by laws (all states except NSW)
   - Exclusive use allocations (NSW)
   - Funding Proposals
   - Lot Authorisations
   - Unregistered by-laws

   See the detailed screenshots below

## INFORMATION CERTIFICATES

4. **Register reports can now be easily attached to information certificates**. Information entered in the Building Card>Registers tab can be easily attached in PDF format to information certificates for all states and territories when you are generating the information certificate. See the detailed screenshots below

## MEETINGS

5. **Minutes motion report –** fields relating to proposed budgets now populate correctly. Previously, the following fields were not populating when creating the Minutes Motion report. (although they were populating the Motion Report for the agenda)
   - {{Total_Total_Budget}}
   - {{Admin_Total_Budget}}
   - {{Sinking_Total_Budget}}
   - {{Sch1_Name}}-{{Sch6-Name}}
   - {{Sch1_Admin_Budget}} – {{Sch6_Admin_Budget}}
   - {{Sch1_Sinking_Budget}} – {{Sch6_Sinking_Budget}}
   - {{Sch1_Total_Budget}} - {{Sch6-Total_Budget}} PS 413

## DIARY

6. Creating a manual reminder. If you attempt to create a manual reminder in the diary, that is *not* an all day event, but do not enter a time and/or date, the fields for start and end time now have a red background until data is entered. This clarifies that these details need to be entered before a manual diary reminder can be saved.

## SUPPLIER PAYMENTS

7. **Regenerating a payment file.** You can now no longer click *Regenerate File* more than once. This is to prevent a scenario where a reversal could be processed multiple times, leading to discrepencies in the supplier ledger and bank reconciliation.

## REPORTING

8. **Owner List Report** – the owner list report now shows information entered in the lot owner address *state* field in uppercase regardless of whether the data on the lot card was entered in upper or lowercase. This ensures consistency on the report.

## RECEIPTING

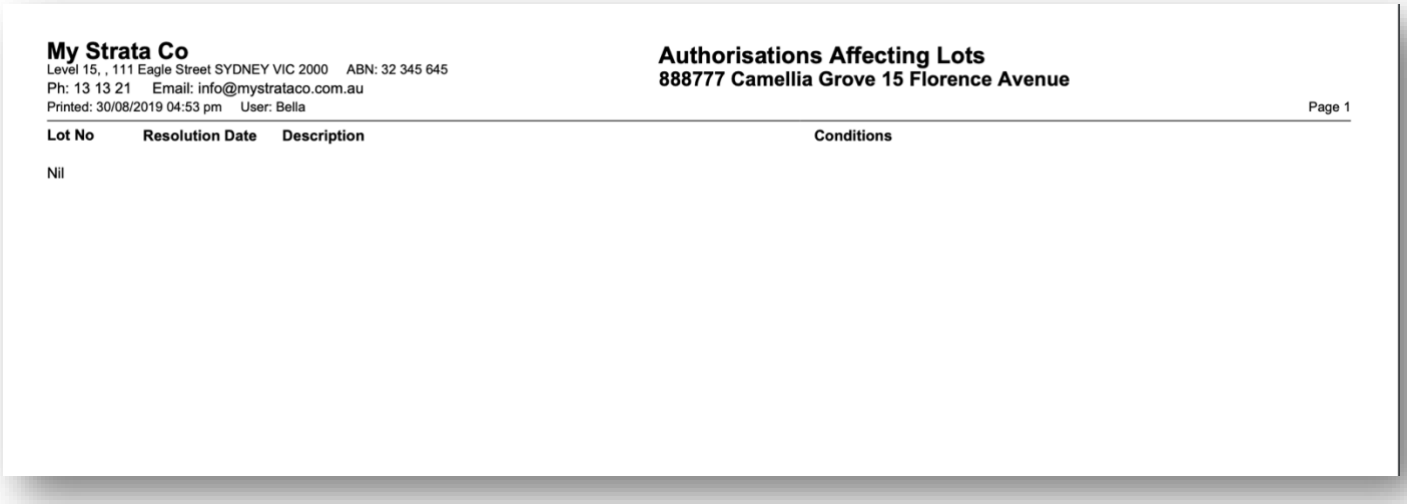
9. **Manual Deposits.** An issue where users who had permission to add manual deposits (but not edit them) were receiving an error when they created a new manual deposit has now been fixed. Users that have permission to add a manual deposit but not permission to edit a manual can now create a manual deposit but will not be able to subsequently edit the deposit.

## DETAILED SCREENSHOTS

### REGISTER REPORTS

Register reports from the information entered in the building card>registers tab now show nil for sections where there are no entries to improve clarity. This applies to:

- Assets Register
- Authorisations affecting Lots
- Common authorisations
- Compliance register
- Contracts register
- Common rights property by laws (all states except NSW)
- Exclusive use allocations ()
- Funding Proposals
- Lot Authorisations
- Unregistered by-laws



**My Strata Co**
Level 15, , 111 Eagle Street SYDNEY VIC 2000 ABN: 32 345 645
Ph: 13 13 21 Email: info@mystrataco.com.au
Printed: 30/08/2019 04:53 pm User: Bella

**Authorisations Affecting Lots**
**888777 Camellia Grove 15 Florence Avenue**

Page 1

| Lot No | Resolution Date | Description | Conditions |
|---|---|---|---|
| Nil | | | |

## REGISTER REPORTS CAN BE A SELECTED AND ATTACHED TO INFORMATION CERTIFICATES

Information entered in the Building Card>Registers tab can now be easily attached in PDF format to information certificates for all states and territories. You can select which register reports to attach when generating the information certificate.

If you attach reports to a draft information certificate, PropertyIQ will retain your selections when the final certificate is generated.

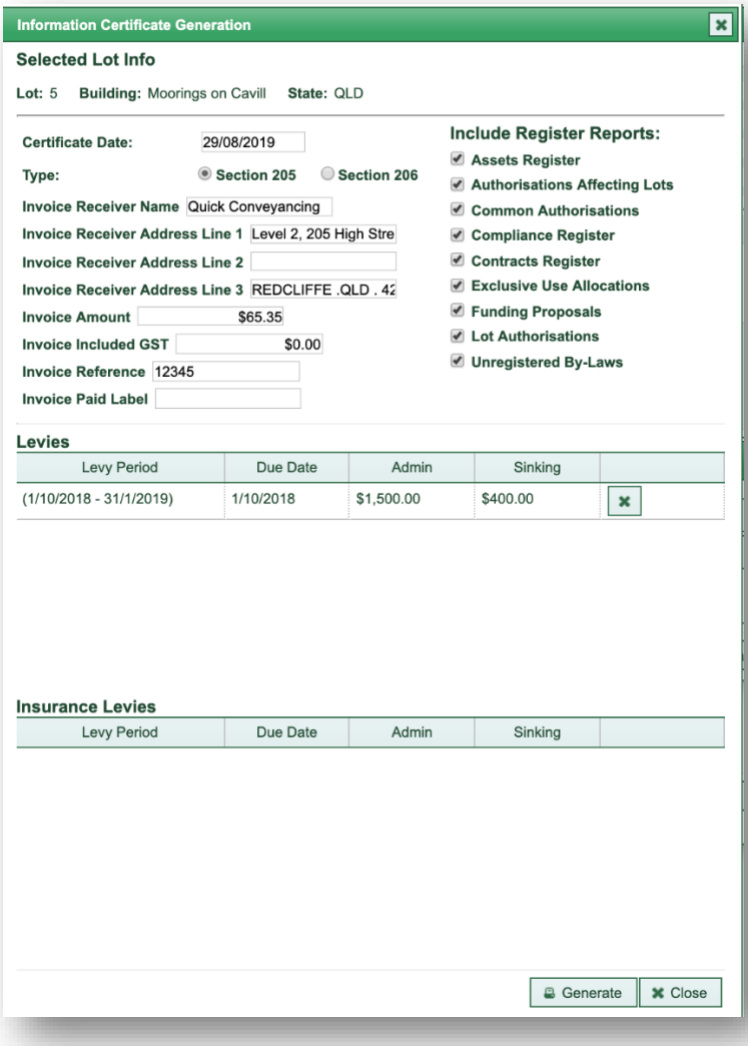
For Queensland buildings this is available for both the Section 205 and the Section 206 certificate.

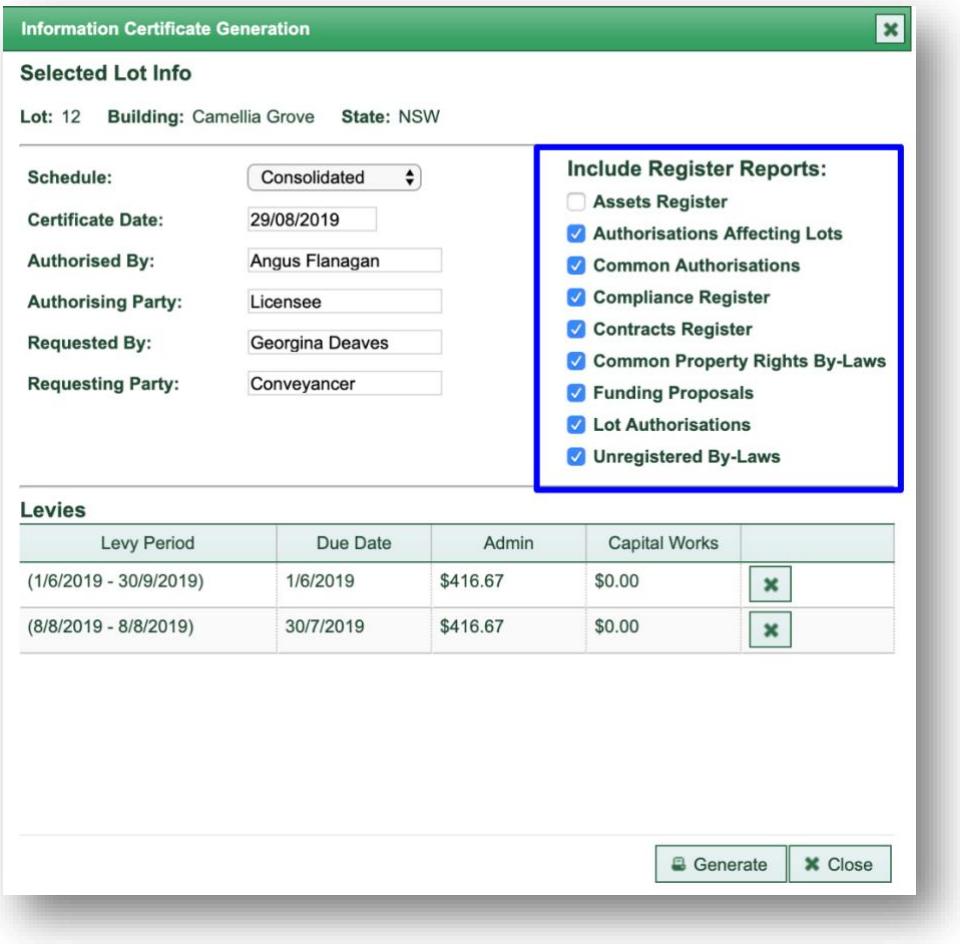
The following reports may contain some information that *is* specific to a lot and some information that *is not* specific to any lot:

- Exclusive use allocations (all States except NSW)
- Common property rights by-laws (NSW)
- Lot authorisations
- Common authorisations
- Authorisations affecting lots
- Unregistered by-laws

For these reports, information related to the lot the information certificate is being produced for *will* show on the report as well as information that does not relate to any lot. Information related to another lot *will not* show on the report when it is attached to an information certificate.

Note: If you generate register reports from the building card, the report will still show entries for all lots and those not related to any lot. There is no change to this functionality.


Information Certificate Generation
Selected Lot Info
Lot: 5 Building: Moorings on Cavill State: QLD
Certificate Date: 29/08/2019
Type: Section 205 Section 206
Invoice Receiver Name Quick Conveyancing
Invoice Receiver Address Line 1 Level 2, 205 High Stre
Invoice Receiver Address Line 2
Invoice Receiver Address Line 3 REDCLIFFE .QLD . 42
Invoice Amount $65.35
Invoice Included GST $0.00
Invoice Reference 12345
Invoice Paid Label
Include Register Reports:
Assets Register
Authorisations Affecting Lots
Common Authorisations
Compliance Register
Contracts Register
Exclusive Use Allocations
Funding Proposals
Lot Authorisations
Unregistered By-Laws
Levies
Levy Period
Due Date
Admin
Sinking
(1/10/2018 - 31/1/2019)
1/10/2018
$1,500.00
$400.00
Insurance Levies
Levy Period
Due Date
Admin
Sinking
Generate
Close

## NSW Building

This is a NSW building, other states show *Exclusive Use Allocations* in place of *Common Property Rights By-Laws*