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A Macquarie Bank and CoreLogic joint venture

PropertyIQ™

PropertyIQ Strata Version V0.139.1 – V0.140.0 Release Notes

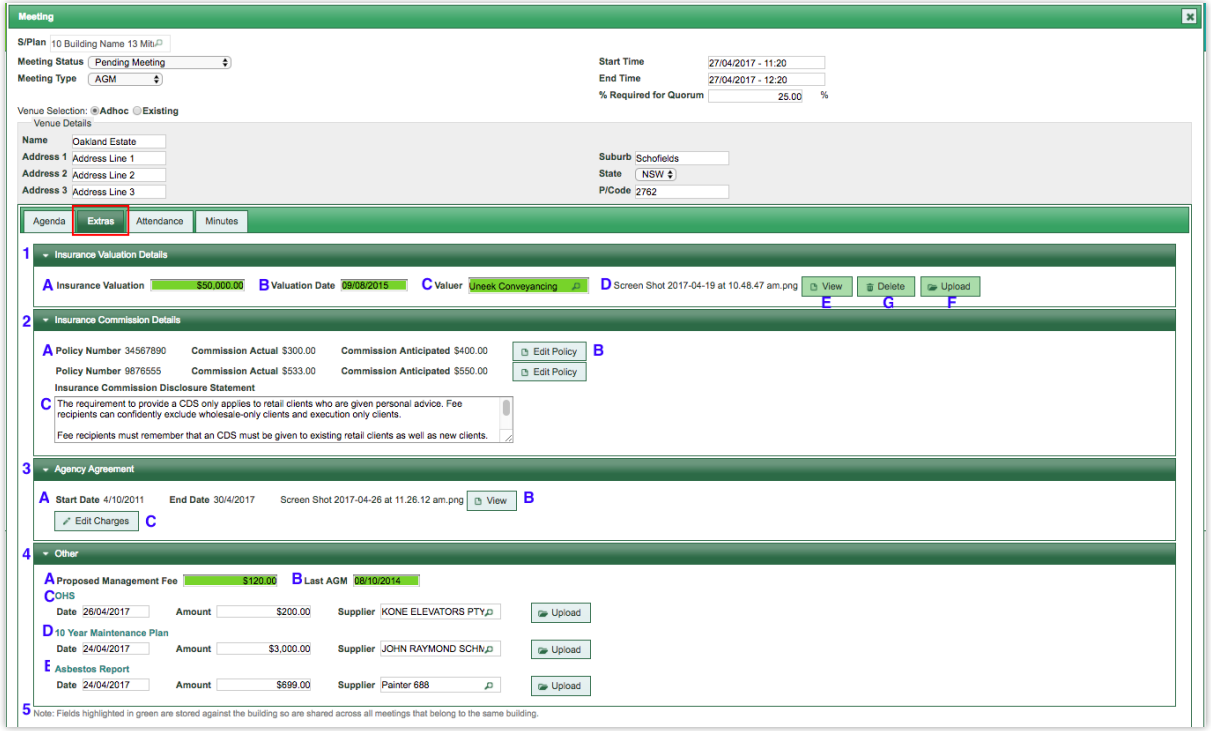
Features	► Added the ability for “Folio” users to use the Agent Block Merge fields in the following templates to ensure the correct Folio company information merges (Please see page 7) ○ Annual Levy Notices ○ Custom Templates ○ Debtor Invoices ○ Deposit Slips ○ Utility Notices ○ Meeting Notices ○ Minute Notices ○ Information Certificates ► Created new merge fields for further Tenant details (Please see page 9) ○ {{Tenant_Salutation}} ○ {{Tenant_Contact_Name}} ○ {{Lease_Start}} ► Created a new Tab available within the Meeting Card called “Extras” (Please See Page 5) ○ This tab will give the users the ability to see the following information:- ▪ Insurance Valuation Details including Amount, date and Valuer.

        - Insurance Commission Details including all current Policy numbers, commission actual amounts and anticipated commissions.
        - Agency Agreement Information including the start and end date of the agreement and a link to the PDF agreement.
        - Other information such as OHS details, 10 Year Maintenance Plan and Asbestos Report.
    - Note: All fields highlighted in green are stored against the building so are shared across all meetings that belong to the same building.
    - Once a Meeting Status has been set to “Completed”, the Insurance Valuation Details, Insurance Commission Details and Agency Agreement Accordions will be hidden.
- Added new toggles within the TODO>MEETINGS screen for “Complete” “Pending Meeting” “Pending Minutes” for filtering options. (Please see page 14)
    - We have also added the ability to sort on the date column within the meeting grid.
    - This defaults to show the newest meeting at the top.
- Added a new menu option under UTILITIES>MEETING MOTIONS. (Please see page 14)
    - This menu will show the user all global motions that have been entered into the system.
    - A user has the ability to add/edit/view a motion
    - New permissions have been added for editing global motions from the Motion Library. These have been assigned to the default roles as follows:-
        - Admin: View/Add/Edit/Delete
        - Accounts: View
        - Manager: View
    - These can be altered to suit your office needs.
    - A new default document type has been added called “Motion Attachment”.
        - This document type does not require a building or supplier to be selected when uploading files of this type. As it is used for attachments of motions in the Global Library.
- Altered the “Nominations” accordion within the meetings card. (Please see page 19)

	○ This section now allows a user to select a lot or a contact to be nominated ○ Can alter the name of the owner for the nomination within the nominations grid. ○ Select the position the person is nominated for. ○ Attach any nomination forms to the screen. ▪ Lots that are unfinancial as at the nominations close date will appear in red. ▪ The nominations close date will default to the buildings end of financial year date when adding a new meeting however this can be altered. ▪ A new default document type has been added called “Nomination Form” ► Created a Nominations Report that can be previewed and generated to be attached to the Meeting Agenda.
Bugs	► Fixed an issue in Meeting Attendance where is was showing Financial owners in red due to a rounding problem. ► Fixed an issue where the Residence email field was not clearing when doing a “Change of Owner” function. ► Fixed an issue where the Diary reminders were not refreshing after a meeting had been deleted from TODO>MEETINGS.
Other	► When viewing the Property Manager details within the Lot Card “Tenancy Details” accordion we are now showing the Agents Name and Email information. (Please see page 10) ► We have altered the behavior when deactivating an “Insurer” within the insurance card. (Please see page 12) ○ When deactivating an insurer, it will now show a pop up that tells the user which buildings are also attached to this insurer. This will allow the user to then ensure the other buildings are altered as required. ○ When saving an Insurance Policy with an “Inactive” insurer, it will show a pop up warning the user that the Insurer is inactive. ○ The Insurer pick list now shows a ALL/ACTIVE/INACTIVE toggle for ease of use. ► Added a new status within the Work Order Quote Request section called “Cancelled” (Please see page 11) ► We have now made the meeting start date and end time fields mandatory fields when adding a new meeting. (Please see page 21)

	○ The system will default the end time to the start time to make it easier for users and can be altered once end time has been reached at the meeting.

Added the ‘Extras’ tab to the meeting card



The fields highlighted in green, get the data directly from the building card, and when changed, the data is saved directly back to the building. (i.e. we don't store the green fields against a meeting)

1. **Insurance Valuation Details**
    a. **Insurance Valuation**
    b. **Valuation Date**
    c. **Valuer**
    The Data for these fields come from the **Building Card > Info > Insurance Section.**
    d. **Insurance Valuation Document-** The document type **'Insurance Valuation'** which will be used if uploading a document.
    e. **View**- User Can View the uploaded document
    f. **Upload-** If the building already has an insurance valuation, and user uploads a 2nd document, it’ll only show one view button which opens the latest uploaded document.
    g. **Delete**- User can delete the uploaded document.

2. **Insurance Commission Details**

a. **Policy Details-** For each active insurance policy on the building, the user can see the **'Policy Number', 'Commission Actual'** and **'Commission Anticipated'** fields

Note: An insurance policy is determined as active if the current date is between the Insurance Policy '**From Date**' and '**To Date**'

b. **Edit Policy**- User can edit the policy directly by clicking on **'Edit Policy'** button.

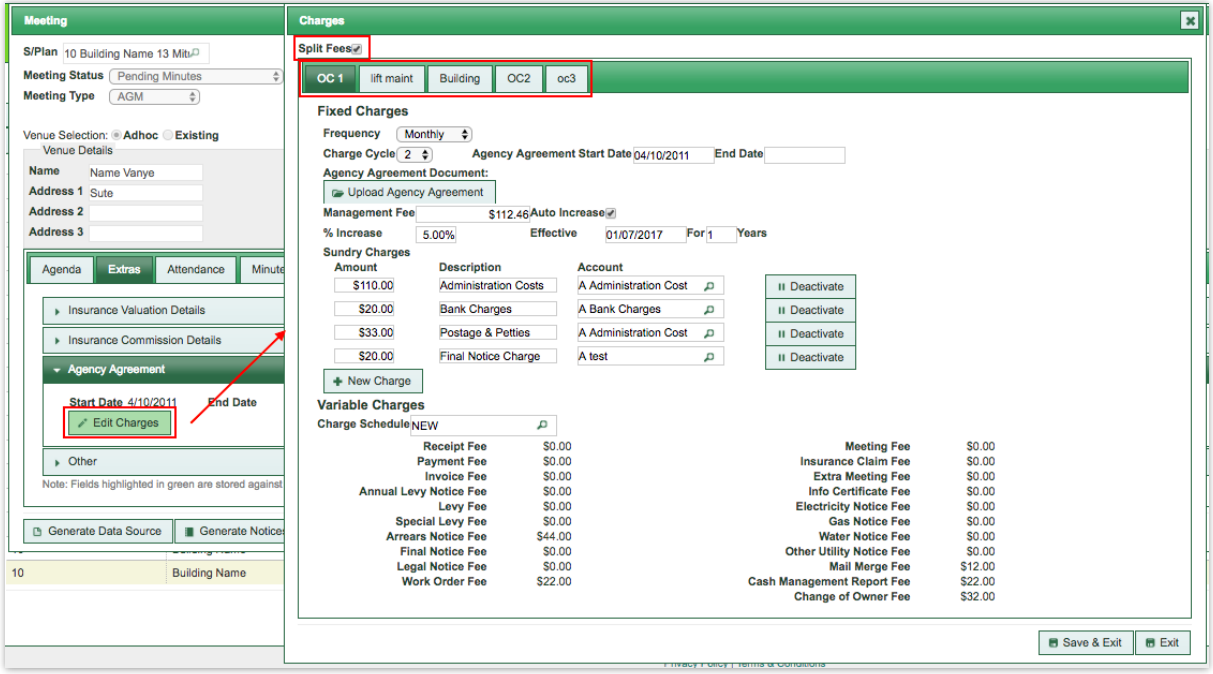
c. **Insurance Commission Disclosure Statement**- User Can define a single insurance commission disclosure statement which is stored against meeting.

3. Agency Agreement

a. User can see the agency agreement **'Start Date'**, **'End Date'** & **'Document'** attached.

b. **View**- User can view the agency agreement by clicking on **'View'** button if uploaded to the system earlier.

c. **Edit Charges**- User can click on **'Edit Charges'** button and if the building has **'split charges'** and more than one schedule, check **'Split Fees'** checkbox > Save it and user will see the '**Start Date', 'End Date' and 'Document'** for each schedule.



4. Other items

a. **Proposed Management Fee**

b. **Last AGM**

We have moved the above **'Proposed Management Fee'** and **'Last AGM'** from the Agenda tab on meetings to the **'Extras'** tab.

c. **OHS**- User can store **'Date', 'Amount', 'Supplier'** and **'Document'** details for **'Occupational Health & Safety'**.

d. **10 Year maintenance plan**- User can store **'Date', 'Amount', 'Supplier'** and **'Document'** details.

e. **Asbestos Report**- User can store **'Date', 'Amount', 'Supplier'** and **'Document'** details against the meeting.

Note: The files uploaded here will be stored as a document type called **'Meeting Attachments'**.

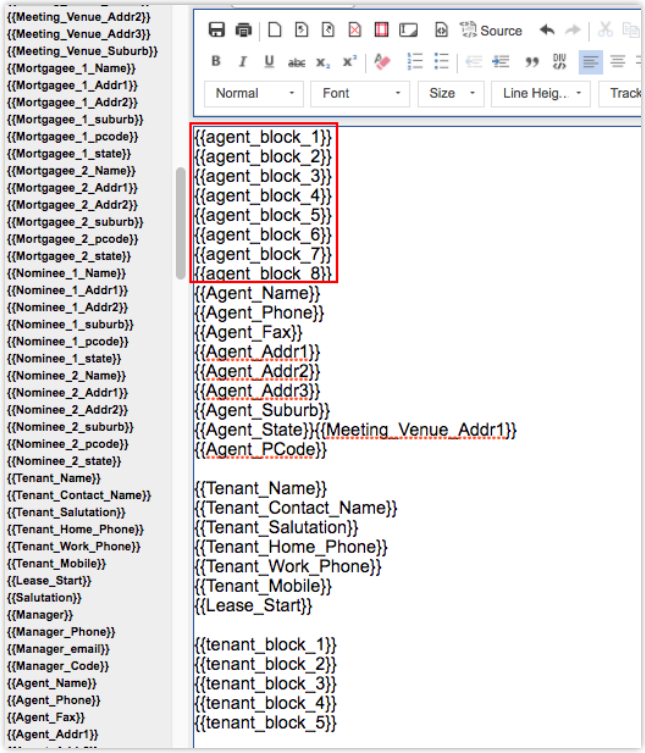
Note: Permission checks:

- User won't be able to edit any building fields on the meetings card (fields highlighted in green) if user doesn't have the 'Edit Building' permission
- User won't be able to Upload files if user doesn't have the 'Add Documents' permission
- User won't be able to Delete files if user don't have the 'Delete Documents' permission.

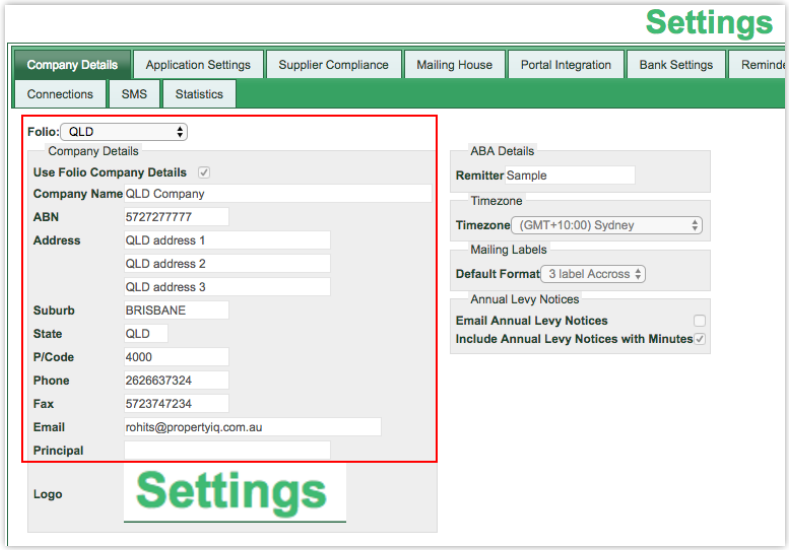
Note: Once a Meeting Status has been set to "Completed", the Insurance Valuation Details, Insurance Commission Details and Agency Agreement Accordions will be hidden.

Added the ability for "Folio" users to use the Agent Block Merge fields in the following templates to ensure the correct Folio company information merges

- Annual Levy Notice
- Custom Template
- Debtor Invoice
- Deposit Slip
- Utility Notice
- Meeting Notice
- Minutes Notice
- Info Certificates



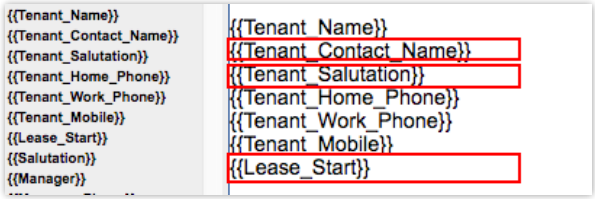
If the following tick box is selected “Use Folio Company Details” the Agent block merge fields will now merge folios company details from **Settings> Company Details> Folio.**



New merge fields for the new Tenant details

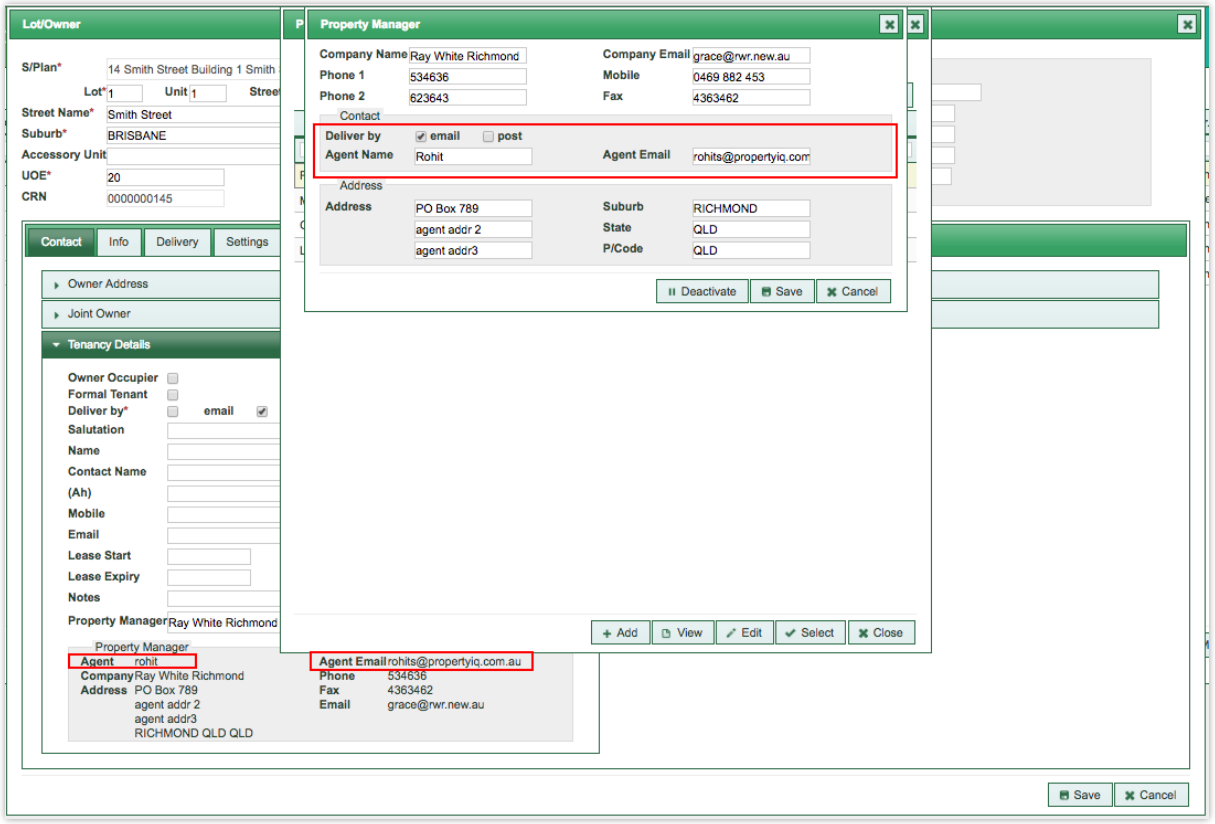
Created new merge fields within "Custom Merge Templates" as follows:-

- Tenant_Salutation
- Tenant_Contact_Name
- Lease_Start



Agent name for property manager to appear on the lot card

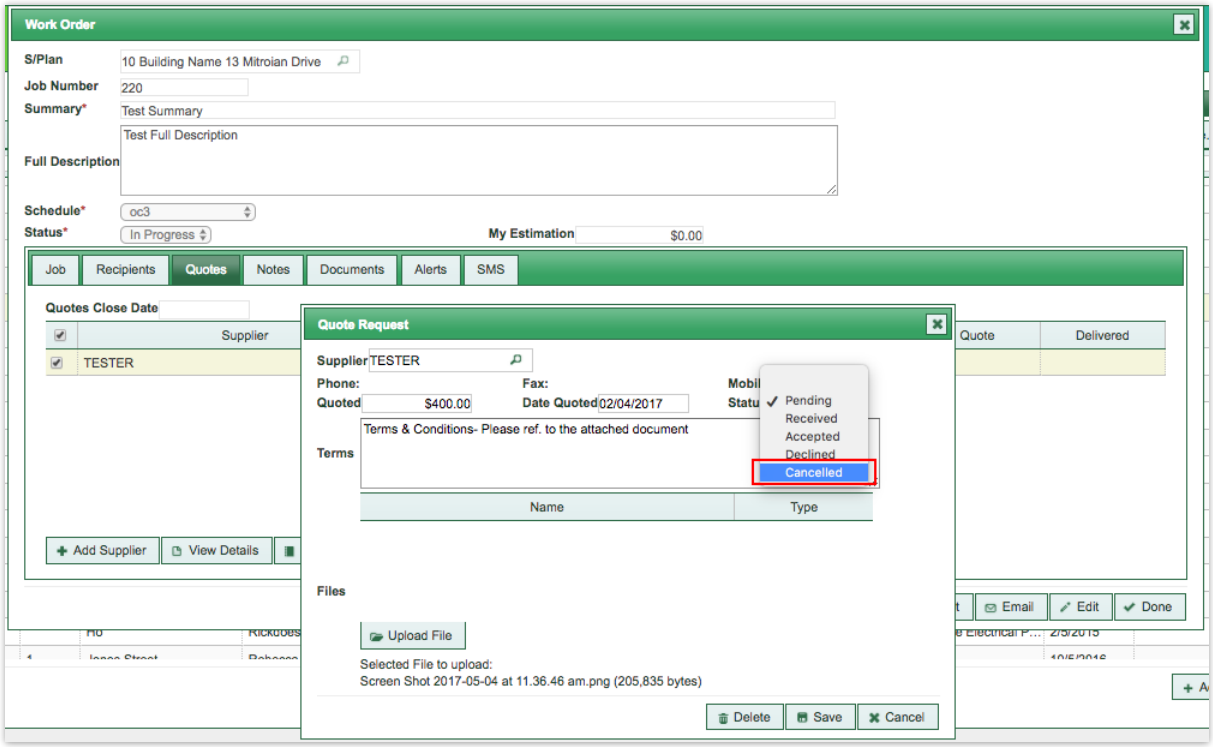
A user can currently load an "Agent Name" and “Agent Email” when loading a property Manager.
We have now extended the Property Manager view from within the Lot Card “Tenancy Details” accordion to have these appear for easy access to users.



Added "Cancelled" status to quotes

We have now added ‘cancelled’ as a drop down field option in the quotes section of Work Orders.

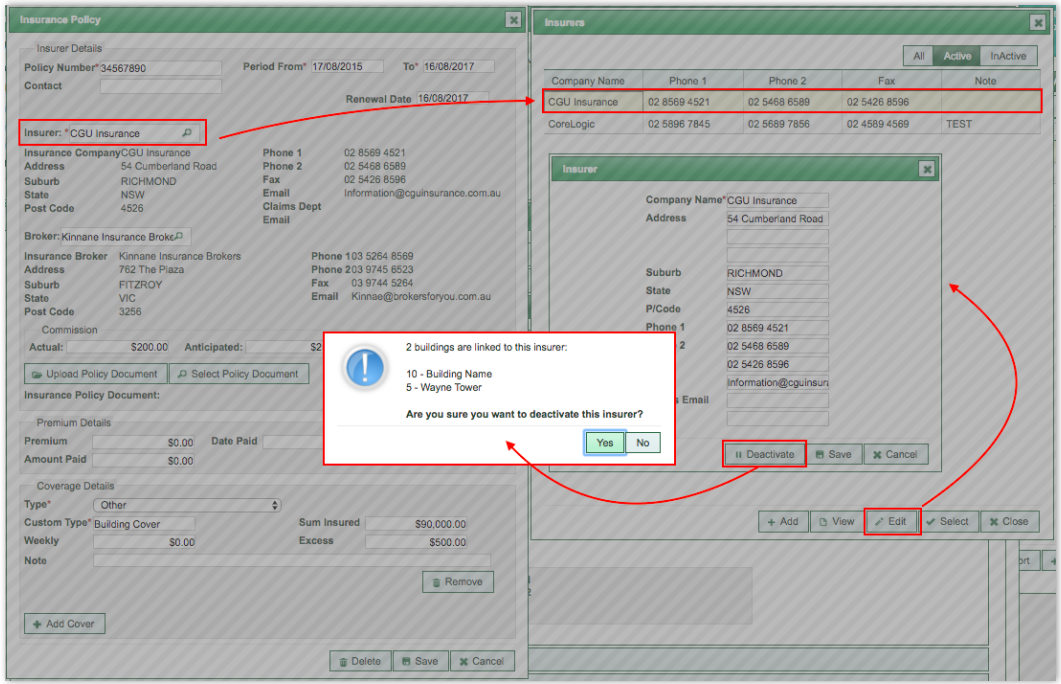
TO DO>WORK ORDERS>Open a work order>**QUOTES>**Select one>**VIEW DETAILS>EDIT**



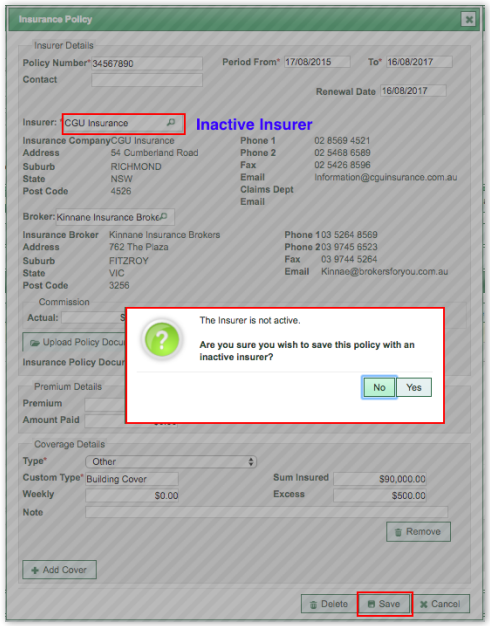
Building Insurance - Deactivating insurers

FILE>BUILDINGS>Select any building**>INFO>INSURANCE>**Select a policy**>EDIT>INSURER**

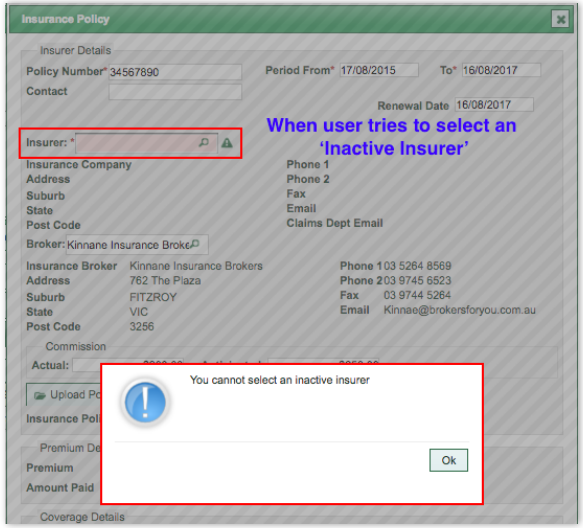
- When deactivating an insurer, the user will see a popup displaying the list of buildings with any policies currently using that insurer.



1. If a user saves an insurance policy with an inactive insurer attached, a pop up will appear to warn the user that the insurer is inactive.



2. When selecting a new insurer to attach to the insurance policy, the user will not be able to pick an inactive insurer.



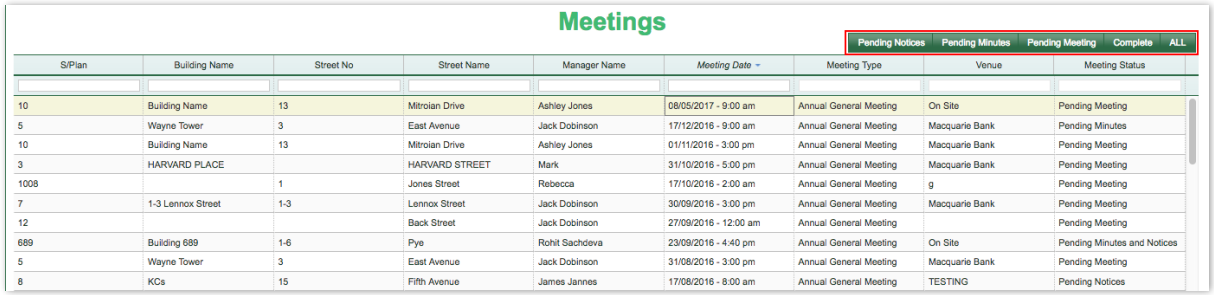
NOTE: If there are no linked buildings, or the Insurance Policy is inactive, then clicking 'Deactivate' should deactivate the insurer immediately.

Added status filters to the meetings view

We have added the ability to filter by the below mentioned meeting statuses on the Meetings Grid

1. Pending Notices
2. Pending Minutes
3. Pending Meeting
4. Complete
5. All

Also, we have set the Meetings Grid view to have a default sort on the date column, so by default it'll show the most recent meetings at the top.



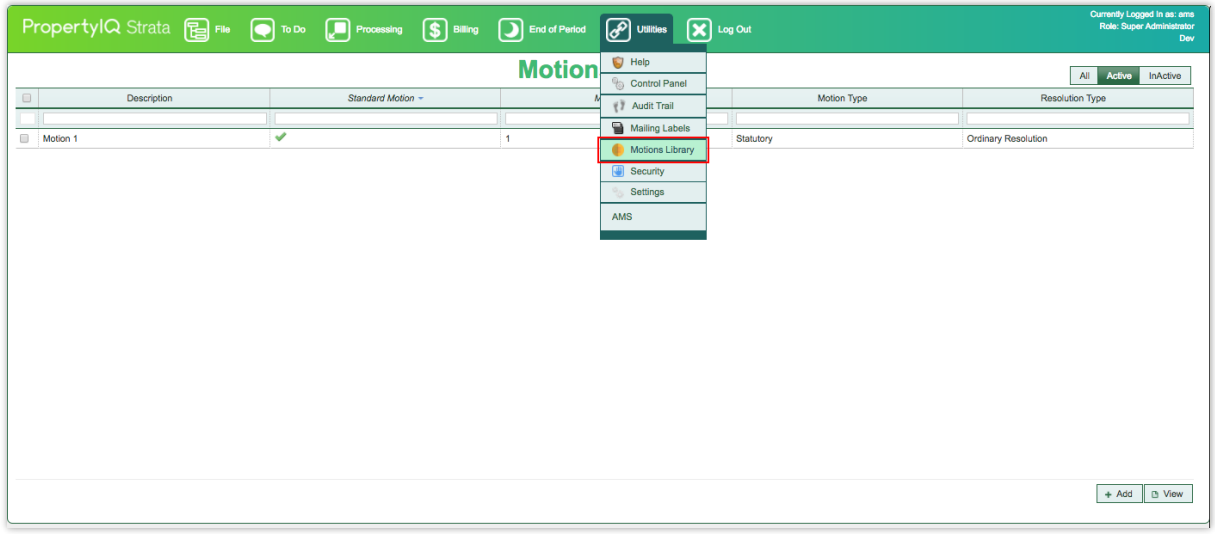
S/Plan	Building Name	Street No	Street Name	Manager Name	Meeting Date	Meeting Type	Venue	Meeting Status
10	Building Name	13	Mitroian Drive	Ashley Jones	08/05/2017 - 9:00 am	Annual General Meeting	On Site	Pending Meeting
5	Wayne Tower	3	East Avenue	Jack Dobinson	17/12/2016 - 9:00 am	Annual General Meeting	Macquarie Bank	Pending Minutes
10	Building Name	13	Mitroian Drive	Ashley Jones	01/11/2016 - 3:00 pm	Annual General Meeting	Macquarie Bank	Pending Meeting
3	HARVARD PLACE		HARVARD STREET	Mark	31/10/2016 - 5:00 pm	Annual General Meeting	Macquarie Bank	Pending Meeting
1008		1	Jones Street	Rebecca	17/10/2016 - 2:00 am	Annual General Meeting	g	Pending Meeting
7	1-3 Lennox Street	1-3	Lennox Street	Jack Dobinson	30/09/2016 - 3:00 pm	Annual General Meeting	Macquarie Bank	Pending Meeting
12			Back Street	Jack Dobinson	27/09/2016 - 12:00 am	Annual General Meeting		Pending Meeting
689	Building 689	1-6	Pye	Rohit Sachdeva	23/09/2016 - 4:40 pm	Annual General Meeting	On Site	Pending Minutes and Notices
5	Wayne Tower	3	East Avenue	Jack Dobinson	31/08/2016 - 3:00 pm	Annual General Meeting	Macquarie Bank	Pending Meeting
8	KCs	15	Fifth Avenue	James Jannes	17/08/2016 - 8:00 am	Annual General Meeting	TESTING	Pending Notices

Note: If user selects BOTH **"Pending minutes" & "Pending notices"** as the filter, the results will also include the status **"Pending minutes and notices".**

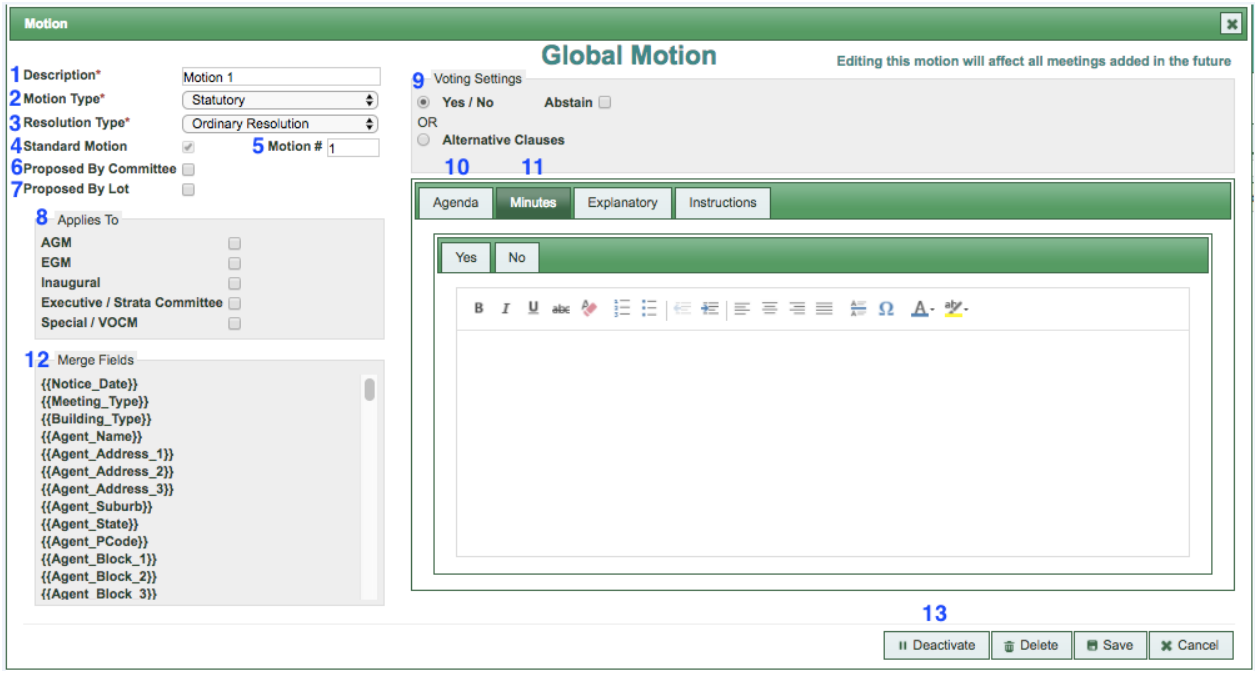
Include Global Motions Library

We have created a new file menu under **UTILITIES>MOTION LIBRARY** which allows users to create and maintain a list of standard and adhoc motions which can be included in the meeting notices so that it is quicker and easier to make meeting agendas.

- A user can add/edit/delete existing motions using the motion entry screen.



- A user will see the below information when a new Motion is added.



Click '+**Add'** to open a new Global Motion window.

1. **Description** – This is a small description for User to easily find a motion.
2. **Motion Types:-**
   - Statutory – When Statutory is selected, "Standard Motion" will be auto ticked.
   - Owner – When Owner is selected, "Proposed by Lot" will be auto ticked.
   - Committee- When Committee is selected, "Proposed by Committee" is auto ticked
   - Alternative – For any other types of Motions you wish to add.

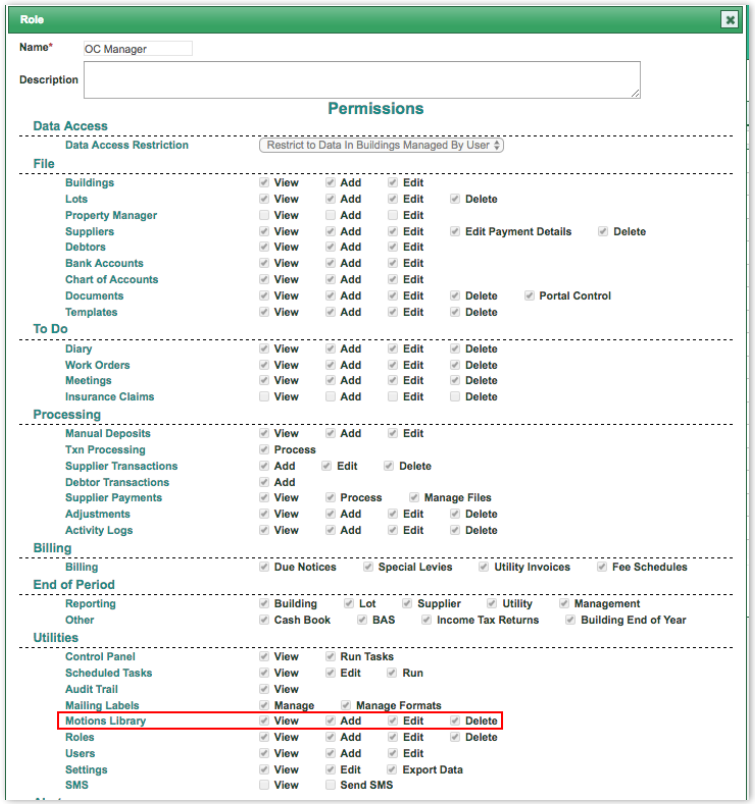
3. **Resolution Types**:
   i. Ordinary Resolution
   ii. Resolution Without Dissent
   iii. Special Resolution
   iv. Majority Resolution
   v. General Resolution
   vi. Unanimous Resolution
   vii. Interim Special Resolution
   viii. Interim Ordinary Resolution

Please Note: This list is global for all states. A user is only required to use the Resolution Types that apply to their state.

4. **"Standard Motion"** – This is checked by default when a "Statutory" motion type is selected.
5. **Motion #-** User can specify at which position this motion should appear by specifying number, like 1;2;3 and so on.
6. **"Proposed by Committee"** Allows user to specify that it's from Committee members.
7. **"Proposed by Lot"** – This allows the user to select the lot #.
8. **Applies To**: - This allows the user to select more than one for each motion. This will determine which motions will automatically appear as standard motions depending on the meeting type that is selected when creating the meeting.
   i. AGM
   ii. EGM
   iii. Inaugural
   iv. Executive / Strata Committee
   v. Special / VOCM
9. **Voting Settings-** Allows the user to select either "Yes / No" voting, or 'Alternative' Voting
   i. If Yes / No voting, then user can also enable an option to 'Abstain'
      i. If Alternative voting, this allows the user to enter anything between 2-10 options.
      ii. User has the ability to attach a document for each alternative clause.
10. **"Agenda" Tab**- Under the Agenda tab, user can specify what text they wish to appear for this motion on the agenda.
    i. When Alternative clauses are selected, it allows the user to select what text should appear for each item for this motion on the agenda by clicking on the different numbered tabs.
11. **"Minutes" Tab-** Under the Minutes tab, user can see Yes / No and/or Abstain if the voting type is Yes / No.
    i. User can specify what text they wish to appear for this motion on the minutes depending on the vote it has received
12. **Merge Fields**
    i. User has merge fields available for- Agenda / Minutes / Alternative clauses etc.
    ii. The list of available merge fields are from Meeting Notices Templates but exclude merge fields related to Owner/Lot and Motion merge fields. (as these merge fields are not relevant for the motions library).
13. **Edit**- User can edit the existing Motions and has the ability to activate / de-active motions as well as filter the grid by active / inactive motions.

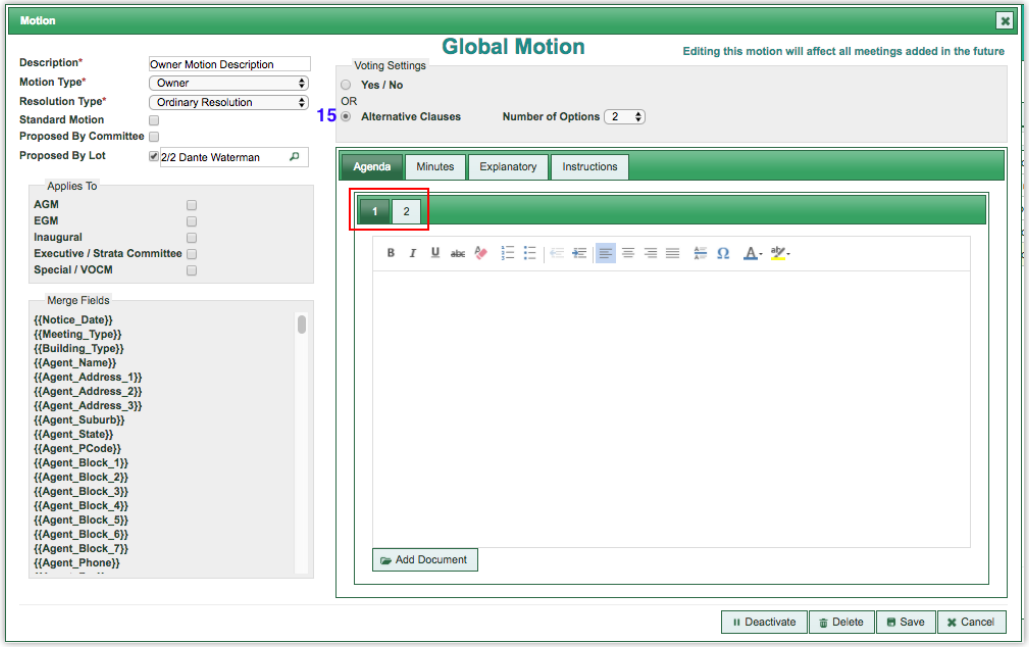
14. **Permissions**- New permissions have been added for editing global motions from the Motions Library. These have been assigned to the default roles as follows:
    - **Admin**: View/Add/Edit/Delete
    - **Accounts**: View
    - **Manager**: View

    Go to Utilities> Security> Click '+Roles'> Select a role to assign motions permissions> Click 'View'



15 **Voting Settings- Alternative Clauses**

- If Alternative voting is chosen, user can enter anything between 2-10 options in 'Agenda' and 'Minutes' as shown below.
- User can add documents to 'Agenda' tab for each agenda specified.

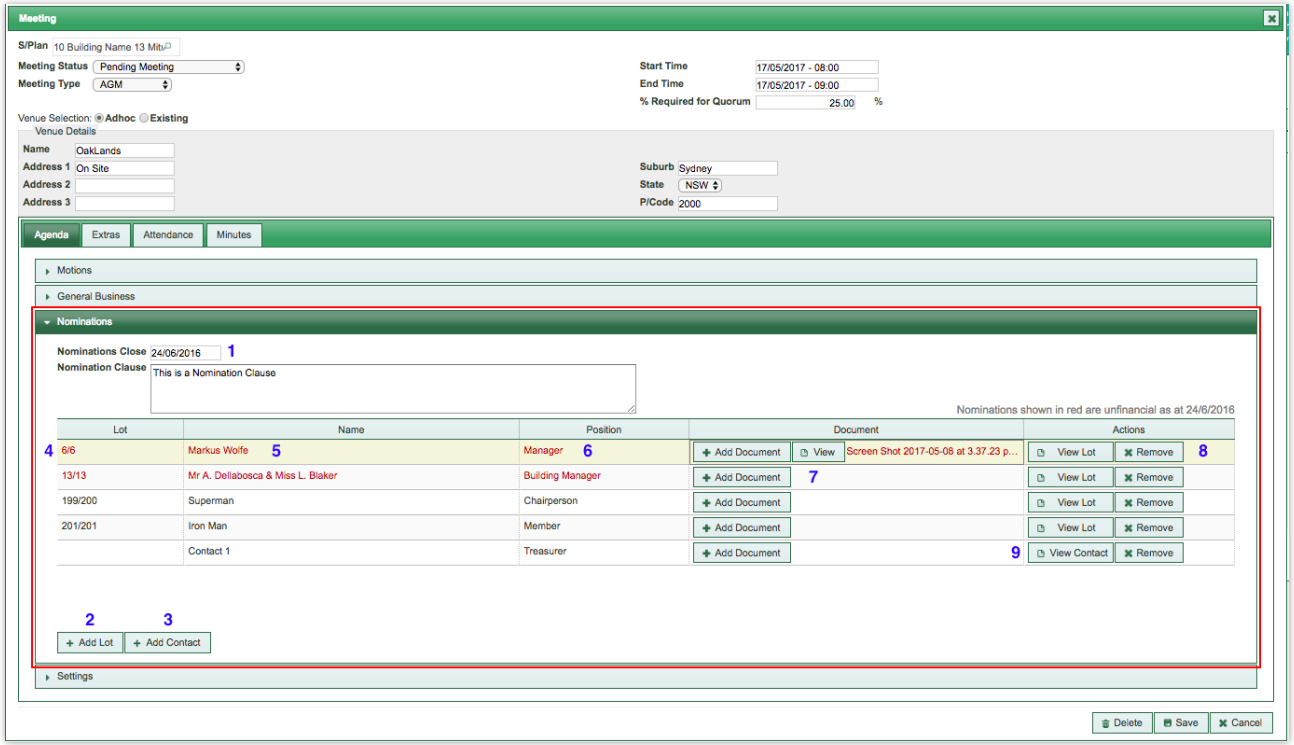


Note: A new default document type called **'Motion Attachment'** has been added. This document type does not require a building or supplier to be selected when uploading files of this type, as it is used for attachments of motions in the global library (which are not related to a building)

Please Note: We have not attached the Motions Library to the Meeting Cards in this Phase. Phase 1 is to allow users to start creating their Motions within PropertyIQ Strata so that they are ready for when the Motion Library is attached to the Meeting Card.

Changes to Meeting Nominations Section

To Access the Nomination Changes go to- **To Do>Meetings**> 'Add' a New Meeting> 'Agenda' Tab> **'Nominations'**



1. Nominations **Close Date** will default to the Buildings **End of Financial Year Date** when adding a new meeting. This can be altered by the user.
2. User can select of lot to be nominated, using **'Add Lot'** button
3. User can select other contacts using **'Add Contact'** button (to be used for adding nominees that are not related to the lot, e.g. a Power of Attorney)
4. **Lot Column** is non-editable field and shows Lot/Unit no.
5. **Name column** is editable (defaulting to the name of the selected Lot or Contact) but allowing the user to change.
6. User can click & select the committee **position** from drop-down
7. User can **Upload / View** a document for a returned nomination form.
8. User can **View / Remove Lot**.
9. User can **View / Remove Contact**.

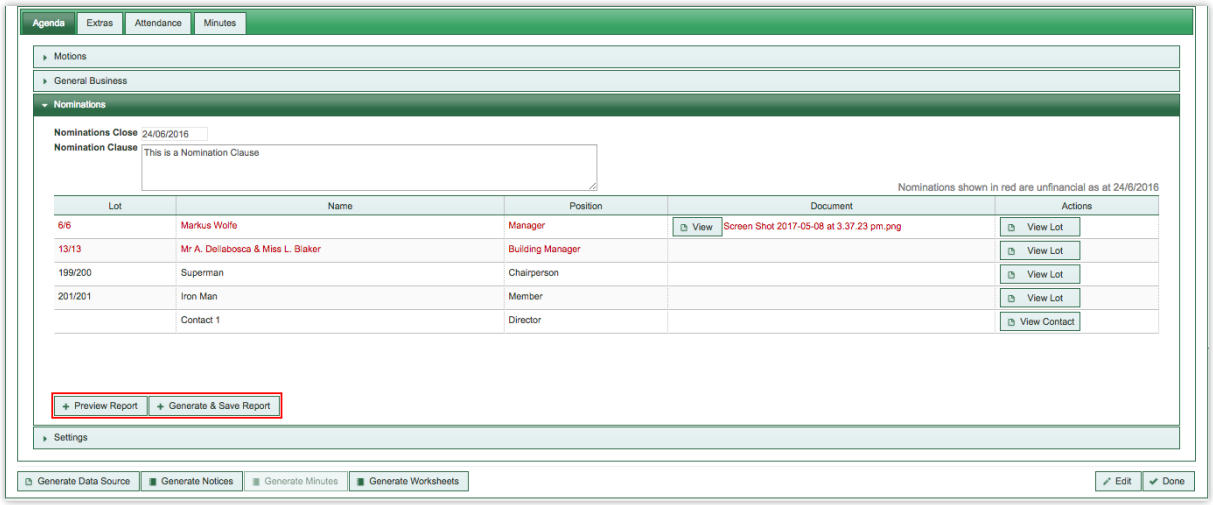
Note:

- Lots which are unfinancial (as at the 'Nomination Close' date) will show in red text.
- The name and the position fields are required fields for all new nominations.
- We have created a new document type called 'Nomination Form' which users can use when uploading new documents from this screen.

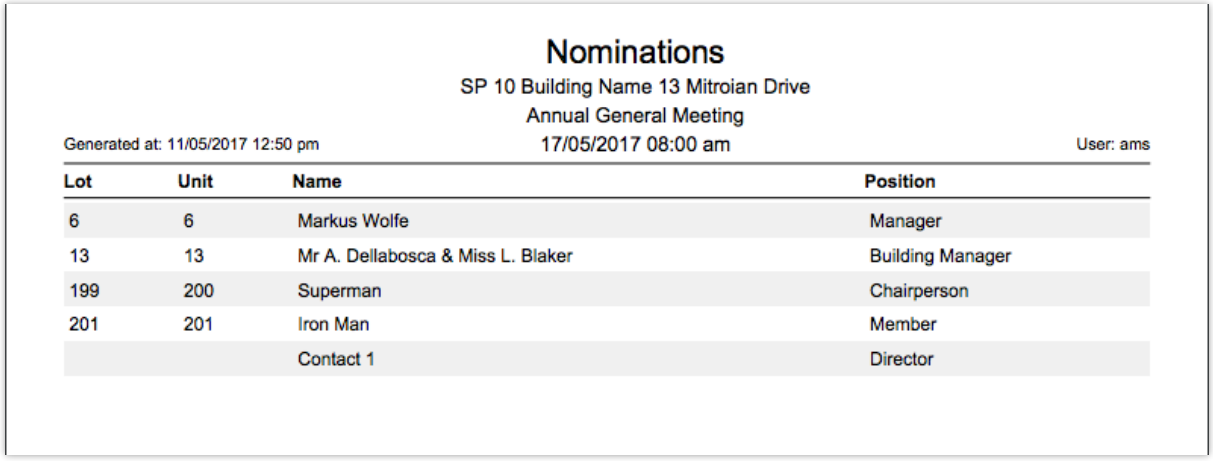
User can also

- Generate report as shown in below screenshot.
- A new system document type called 'Nominations Report' will be used when saving this report.
- User has the option from Nominations panel to 'Preview Report' and 'Generate & Save Report' which will allow the user to generate the PDF report.

If clicking the "Generate & Save Report" button, the PDF will be displayed, but also saved in the Database (in File> Documents) and will also add a link to the document in the 'Meeting> Agenda> Settings' tab, so that the report is automatically included in the agenda notices.



PDF Report will be generated as shown below.



Nominations

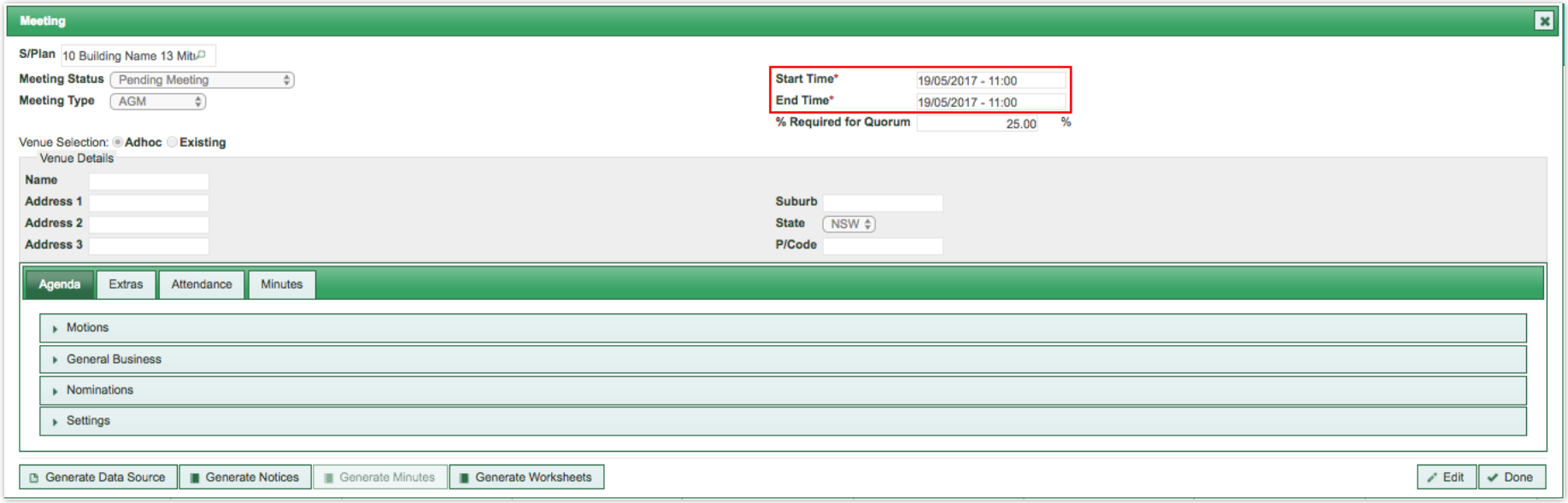
SP 10 Building Name 13 Mitroian Drive

Annual General Meeting

Generated at: 11/05/2017 12:50 pm — 17/05/2017 08:00 am — User: ams

Lot	Unit	Name	Position
6	6	Markus Wolfe	Manager
13	13	Mr A. Dellabosca & Miss L. Blaker	Building Manager
199	200	Superman	Chairperson
201	201	Iron Man	Member
		Contact 1	Director

Start Time and End Time on a Meeting Card are now Mandatory Fields



- We have made the meetings **Start Time** and **End Time** fields as required fields when adding a new meeting.
- Also, End Time will default to the Start Time, to make it easier for users (so they don't need to pick the date twice).