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A Macquarie Bank and CoreLogic joint venture

PropertyIQ™

PropertyIQ Strata Version V0.135.1 – V0.136.0 Release Notes

Features	

- A new menu Option has been added under FILE>PROPERTY MANAGER.
  - This new menu option will allow users to view all Property Managers that are entered within the system from 1 view, rather than having to view the Property Managers within the Tenant section of the Lot Card.
    - Users are able to Add Property Managers
    - Users are able to Edit Property Managers
    - Users are able to Deactivate Property Managers
    - Users are able to search using filters
- We have now enhanced the Cancel Cheque Function to allow users to view more information relating to the Cheque they wish to cancel.
  - The following information is now available to the user:-
    - Cheque Number
    - Payment Date
    - Payee
    - Payer
    - Amount
- There is now the ability to Change Lot Owners in Bulk.
  - This can be found in FILE>LOTS/OWNERS>CHANGE OWNERS.
    - This new screen allows users to upload a copy of the change owner form using the UPLOAD DOCUMENT button.
    - Alter the name of the document if the user wishes.
    - Select the Building the Owner is attached to.

	♦ Select the lot the new owner has purchased. ♦ This screen then allows the user to either select a Lot to link to e.g. this new owner already exists within your database as they own another lot that you manage OR you can enter in the new owner's details. ♦ The document attached to this change of owner will be stored within the lot cards documents tab. ○ The Individual Change of Owner function within the Lot card still exists and can be used on an individual basis. This section however, does not store a Document for the change of ownership. ► We have now added the ability for a user to merge a template for a Tenant. ○ When a user is creating a merge template through FILE>LOTS>MERGE, the option tenant now appears. ○ We have added 5 {{Tenant_Block}} merge fields that will merge the tenant name and lot address. ○ If the lot has the "Owner Occupier" tick box selected, the tenant merge fields will use the Owner name and Lot Address. ○ We have added delivery method tick boxes within the tenant section of the lot card. (Email/Post) ○ When delivering the notices, the system will use the email or post-delivery method within the tenant card unless the owner occupier tick box is selected and then is will use the general correspondence delivery options within the lot card.
Bugs	► Fixed an issue where the Building Export was showing a Permission warning when trying to complete. This has now been altered to allow users to export if they have the permission to export in their Role. ► We have now fixed the Type column within the Committee screen as it was not showing the "Rep/Sub Rep" information. ► Fixed text wrapping on the Account Ledger Report. ► Fixed an issue where the Building Alerts were not always appearing. ► We have fixed the Side Task bar so that it is easier to access when a user has large screens open at the same time. ► We have fixed the spacing/display issue within the side bar where words were too long for the screen. This will now word wrap in order for the screen to stay in line.

Other	► We have now added settings to allow the client choose which date all MIX invoices are entered within PIQS. o Within UTILITIES>SETTINGS>CONNECTIONS, 2 new have been added. ♦ "Set Invoice Transaction Date from MIX with Current Date" – If this is enabled, all invoices imported by MIX will have their transaction date set to the current date and will ignore the transaction date provided by MIX. ♦ "Set Invoice Due Date from MIX with Current Date" – If this is enabled, all invoices imported by MIX will have their due date set to the current date and will ignore the due date provided by MIX. o **Please Note:** Current Date equals the MIX Zip File Date. ► We have now changed the wording on the "Publish" button within the Due Notices Screen to be consistent with other screens. This now reads "Generate and Save". ► We have made a small change to the Budget Breakdown Report when the "Levy Income Only" budget calculation is selected. This has changed the total on the Report to "Total Admin Levy Income" rather than "Total Admin Fund" ► In order to make using PIQS easier whilst having multiple tabs open, we have now made a change to the Tab naming order so that it will now only show the Screen Name e.g Diary, rather than PropertyIQ Strata – Diary. This will allow users to select the appropriate tab easier when a large volume of tabs are open. ► We have now made a change to the Work Order Notes to have columns showing the following information:- o Name o Details o Status o Date and Time Created o Creator ▪ The system will now also automatically create a note when a work order is created within the system. ► We have now removed the "Strike Chargeback Levy" tick as the default within the Due Notice Screen. This will now need to be selected when the user wishes to Strike these charges.

	► We have expanded the Owner name field to be able to have 250 Characters. ► We have added a new dropdown to the diary report screen to allow different sorting on the report, these are as follows:- o Building Name o Building S/Plan # o Date Ascending o Date Descending ► We have added 2 new date fields within the building card date tab. o Date Acquired o Date Resigned ▪ Both of these fields are now available in the Building Export and the API. ► Altered the Supplier Ledger Report to always order by Supplier name when generating the report for multiple suppliers.