Level 21, 2 Market Street, Sydney NSW 2000
propertyiq.com.au

ABN 88 603 672 975
A Macquarie Bank and CoreLogic joint venture

PropertyIQ™

PropertyIQ Strata Version V0.138.5 - V0.139.0 Release Notes

Features	► We have added new 'Log of Changes' tab for Insurance Claims. ► Users can now generate an Insurance Claim report using the **INSURANCE REGISTER** button within Insurance Claims. ► A user can now store a 'Proxy' against a lot. ► We have added a new field called **% REQUIRED FOR QUORUM** within the Meeting Card so a user can customize the % required for a quorum for an individual meeting. (Default % can be defined under 'Utilities> Settings> Application Settings' Tab which applies to all meetings until changed individually). ► We have added a brand new **ATTENDANCE** tab on a Meeting card with the below added features. o Financial / Unfinancial lot arrears will be based off the balance of 'Closing Column' of owner's position or the 'Balance' column of the owner's ledger for quorum calculations. o Unfinancial Lots owners will display in red text. o Ability to load a PDF copy of the Proxy form. o User will be able to create PDF reports when the Meeting Attendance is locked: ▪ Detailed Attendance Report ▪ Summary Attendance Report ▪ Committee Report ▪ Quorum Statistics Report

	Note: All four reports will saved to 'File> Documents' and are linked to the building. The first 3 reports are automatically attached to the meeting documents area to send with the Meeting Minutes. These can be removed from the meeting attachments if not needed. ○ User won't be able to change building on meeting card once the meeting has been saved. ► User now has the ability to assign a Building Alert to the "Activity Log" Entry Screen. ► We have added a new type of Register called **COMPLIANCE REGISTER** under **FILE> BUILDINGS> REGISTERS**.
Other	► Users will now see user friendly values in the **LOG OF CHANGES** Tab and added a date range filter for performance reasons. ► Added the ability to sort and filter on the **LOT** column within **FILE>BUILDINGS** and removed the Units column. ► We have added a **CANCELLATION DATE** field within **PROCESSING>ADJUSTMENTS>CANCEL CHEQUES** window. This Defaults to "Todays Date" ► Added a new merge field '{{APO_Total_Due}}' to be included on:- ○ Reminder Notices, ○ Arrears Notices, ○ Legal Notices, ○ Final Notices, ○ Special Levies and ○ Utility Invoices This merges the **TOTAL DUE** of the invoice **PLUS** the **$2.75** Australia Post Deft charge. **Note:** This will need to be added to your templates if you wish to use this merge field. ► Change to Bank Reconciliation Screen- If a bank account has had no transactions between the last bank reconciliation date to Todays date and the bank balance is $0.00, the system will not show the bank account within the bank rec screen. **Note:** If a transaction for this bank account appears on your next TXN file, the Bank account will reappear in the Bank Reconciliation Screen.

- Clients can now choose whether they wish to have **STRIKE CHARGEBACK LEVIES FOR ARREARS/FINAL/LEGAL NOTICES** to be 'ON' or 'OFF' by default within **UTILTIES>SETTINGS>APPLICATION SETTINGS>STRIKE CHARGEBACK LEVIES BY DEFAULT**.

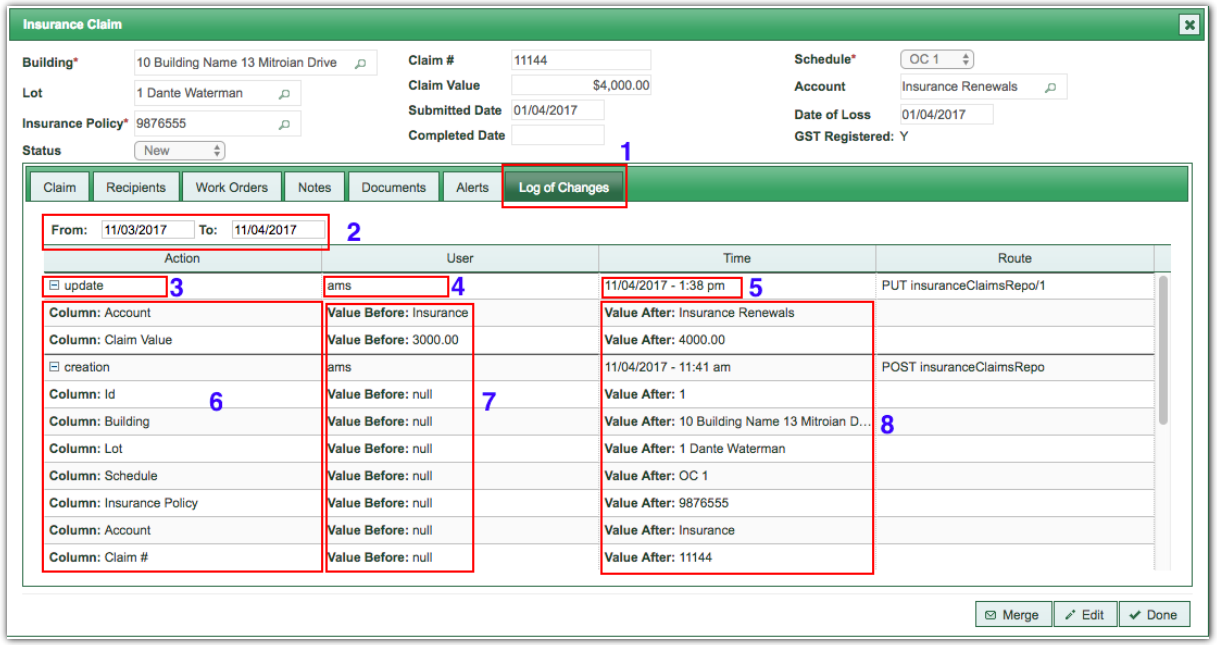
  Note: This has been deployed with the Default set to **ON**

- We have added the new Insurance **VALUER** field to the Strata Roll "Insurance Page".
- The below fields are no longer Mandatory Fields:-
  - **FILE>BUILDINGS>REGISTERS>COMMON AUTHORISATIONS**:- **'Lot'** field is no longer a mandatory field.
  - **FILE>BUILDINGS>REGISTERS>CONTRACTS REGISTER**:- **'Commencement Date'** and **'Termination Date'** are no longer mandatory fields.
- We have now added four new fields to the **ORIGINAL PROPRIETOR** information card under **FILE>BUILDINGS> SETTINGS>ORIGINAL PROPRIETOR**.
  - Contact Name
  - Salutation
  - Additional Contact
  - Solicitor Contact
- All Insurance merge fields are now available within the Minutes Templates for all states.
- User will now have the option to specify a **REPLY TO** through the drop down in **UTILITIES>SETTINGS>EMAIL TEMPLATES** for **WORK ORDER** & **REQUEST FOR TENDER**.

‘Log of Changes’ for Insurance Claim

User can see ‘Log of Changes’ tab by going to:

‘To Do> Insurance Claim> View Insurance Claim> ‘Log of Changes’



1. ‘Log of Changes’ Tab
2. ‘From’ & ‘To’ dates range fields- To view changes by specific date range (Default date filter will show the last month)
3. **Action**- Shows what action was taken i.e. ‘Update’; ‘Creation’ etc.
4. **User**- Which ‘User’ did the change
5. **Time**- ‘Time Stamp’ when changes were done
6. **Column**- Which fields were affected
7. **Value Before**- What the value was before the change in the column
8. **Value After**- What the value is after the changes were saved in that column

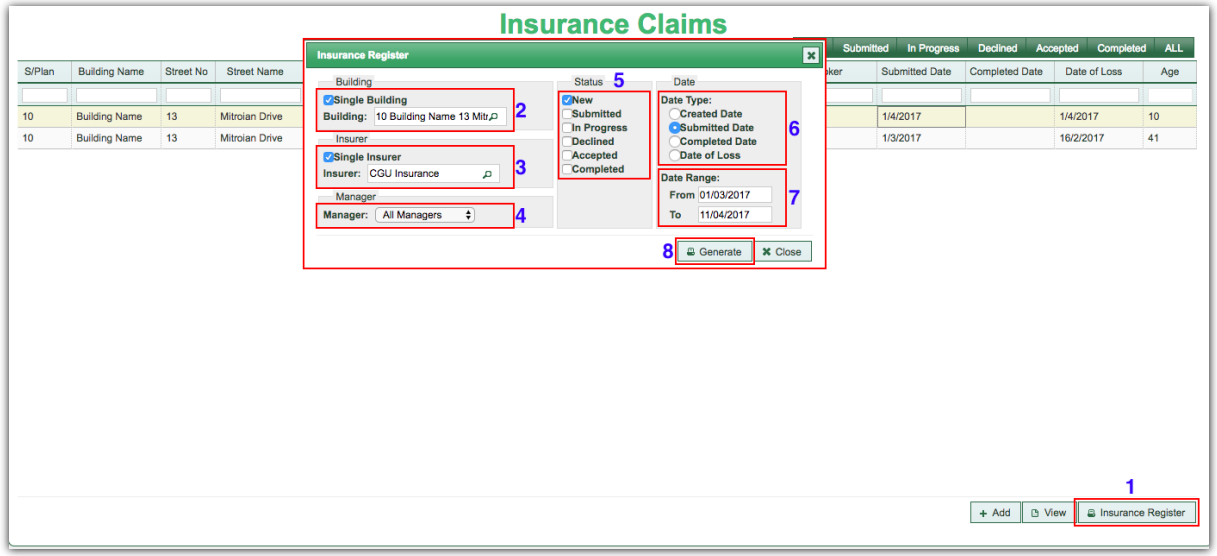
Insurance Register

To access ‘Insurance Register’, go to ‘To Do> Insurance Claims’

Click on

1. ‘Insurance Register’ button on bottom right corner

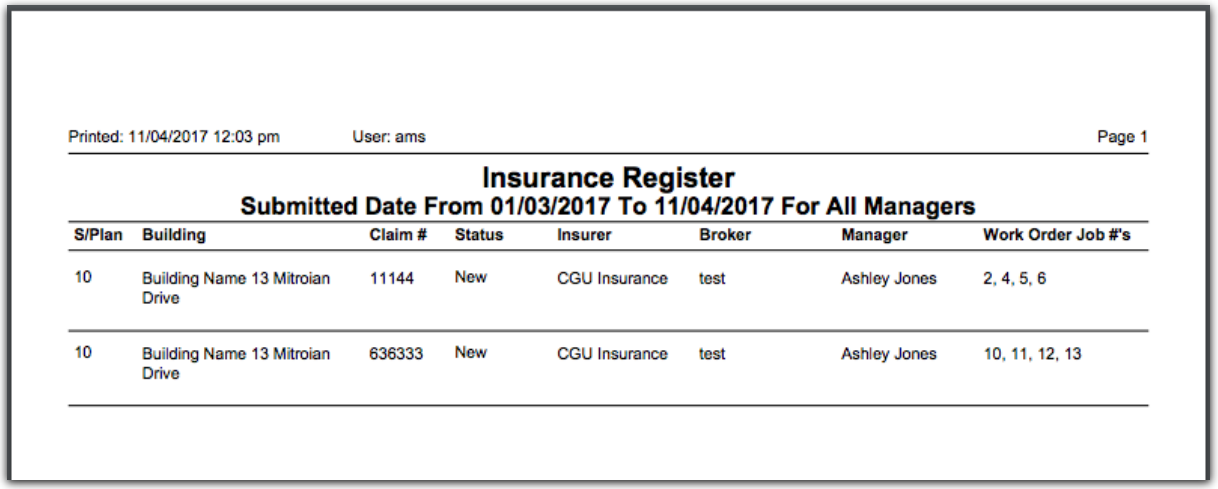
User will see the ‘Insurance Register’ popup with all of the below filters



2. **Single Building**- Check and find a single building to Generate Insurance Claims report related to ‘Single Building’ or leave it unchecked to include all insurance claims related to ‘All Buildings’
3. **Single Insurer**- To Generate Insurance Claims report for a ‘Single Insurer’
4. **Manager-** User can filter to a particular Manager or leave it default to include ‘All Managers’
5. **Status**- User can filter ‘Status’ from
    a. New
    b. Submitted
    c. In Progress
    d. Declined
    e. Accepted
    f. Completed
6. **Date Type**- User can filter report by date type as below (Created Date will be default date)

a. Created date (Date the Insurance Claim was created which can be seen in 'Notes Tab' of Insurance claim)
b. Submitted Date
c. Completed Date
d. Date of Loss

7. **Date Range**- User can specify date range to generate report which will be dependent on type of date chosen in 'Date Type'.
8. **Generate Button**- User can now 'Generate' a report by clicking this button dependent on the filters chosen above.



Printed: 11/04/2017 12:03 pm User: ams Page 1

Insurance Register

Submitted Date From 01/03/2017 To 11/04/2017 For All Managers

S/Plan	Building	Claim #	Status	Insurer	Broker	Manager	Work Order Job #'s
10	Building Name 13 Mitroian Drive	11144	New	CGU Insurance	test	Ashley Jones	2, 4, 5, 6
10	Building Name 13 Mitroian Drive	636333	New	CGU Insurance	test	Ashley Jones	10, 11, 12, 13

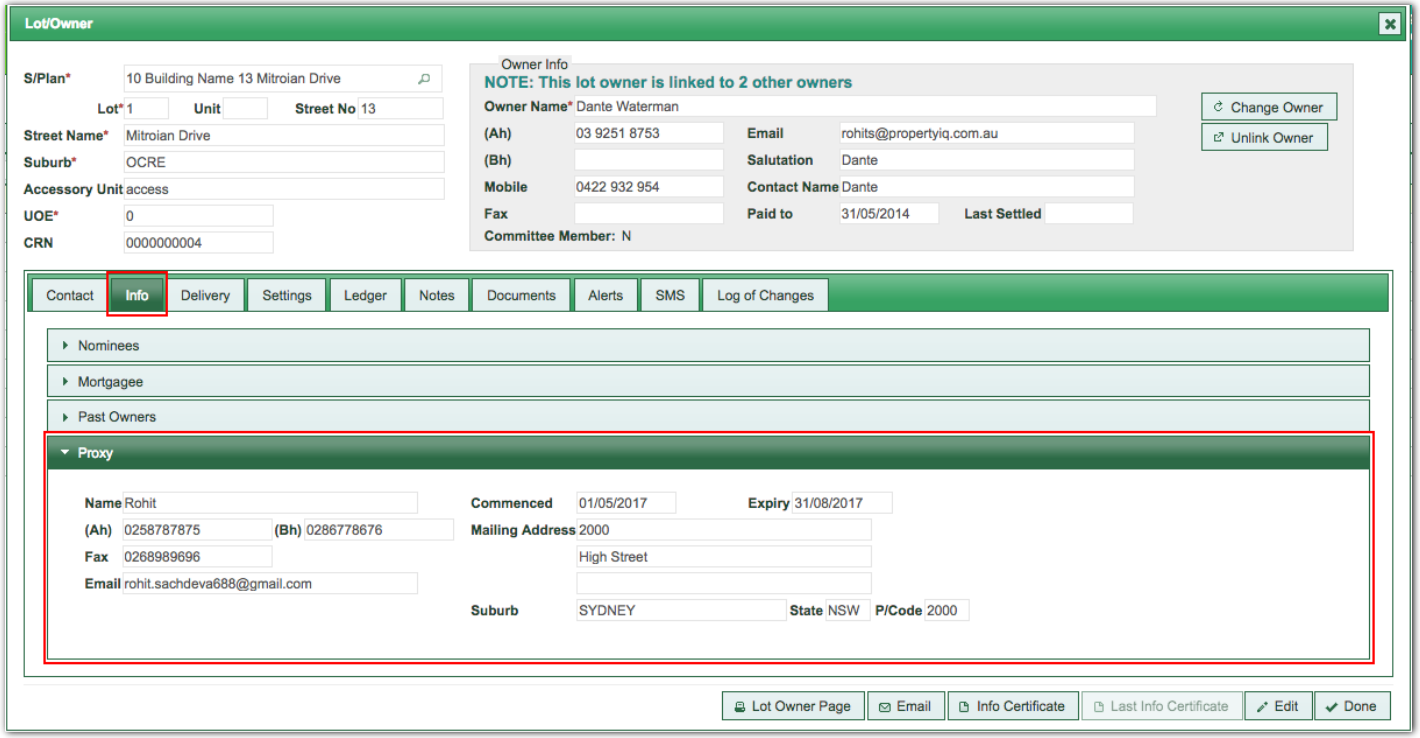
User can now store a 'Proxy' against a lot

To Setup a ‘Proxy’, go to:

File>Lots/Owners> Lot Card> Info Tab> Edit> Click ‘New Proxy’

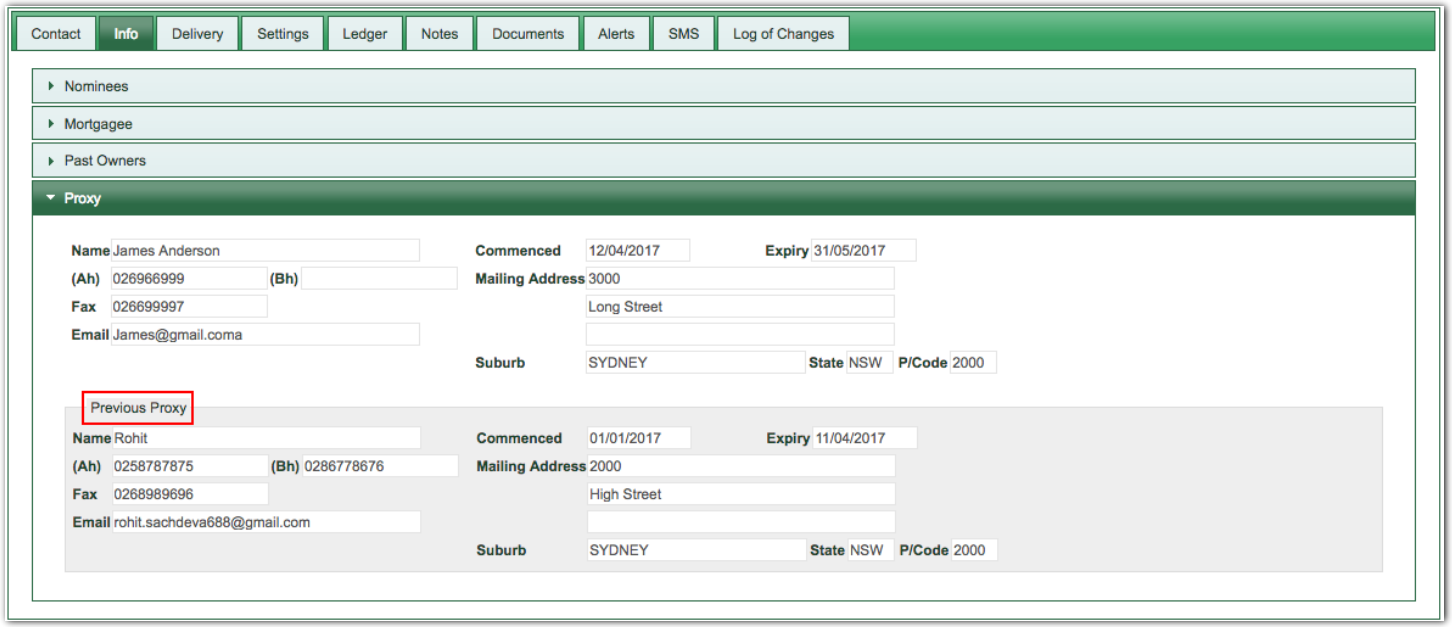
Fill in all the applicable fields and click ‘Save’

This will look like the attached screenshot below

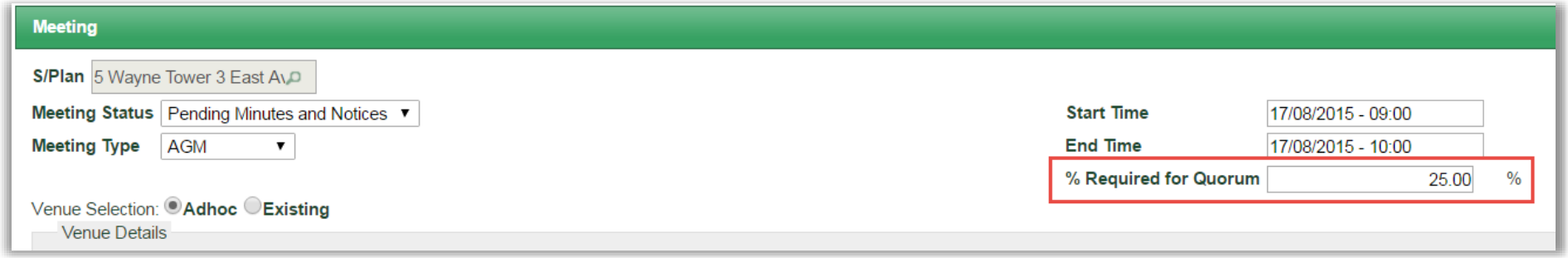


- User can edit the current proxy by using edit button (if user has permissions to edit the lot).
- The following fields are required (mandatory)
    a) Name
    b) Commenced
    c) Expiry
- All the Proxy users will be cleared when a change of owner on the lot occurs by using ‘Change Owner’ button.

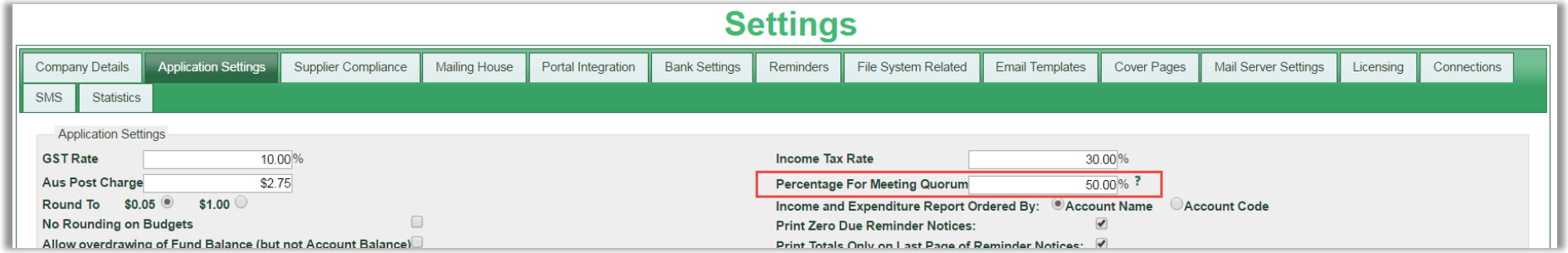
When a user adds a new ‘Proxy’ by clicking ‘Edit> New Proxy’ all the ‘Current Proxy’ details will move to “Previous Proxy” and will become non-editable.


Contact
Info
Delivery
Settings
Ledger
Notes
Documents
Alerts
SMS
Log of Changes
Nominees
Mortgagee
Past Owners
Proxy
Name James Anderson
Commenced 12/04/2017
Expiry 31/05/2017
(Ah) 026966999
(Bh)
Mailing Address 3000
Fax 026699997
Long Street
Email James@gmail.coma
Suburb SYDNEY
State NSW
P/Code 2000
Previous Proxy
Name Rohit
Commenced 01/01/2017
Expiry 11/04/2017
(Ah) 0258787875
(Bh) 0286778676
Mailing Address 2000
Fax 0268989696
High Street
Email rohit.sachdeva688@gmail.com
Suburb SYDNEY
State NSW
P/Code 2000

Added a new field to change the % required for a quorum for an individual meeting



- This field will default to the system setting when creating new meetings.
- Once the attendance on a meeting has been locked, the percentage required for that meeting will be locked (non editable).
- When the system setting 'percentage required for quorum' changes, it will not affect the existing meetings.
- The meeting worksheets Quorum calculations, and the meeting attendance Quorum calculations will both use the Quorum percentage as defined on the meeting card rather than the system settings.

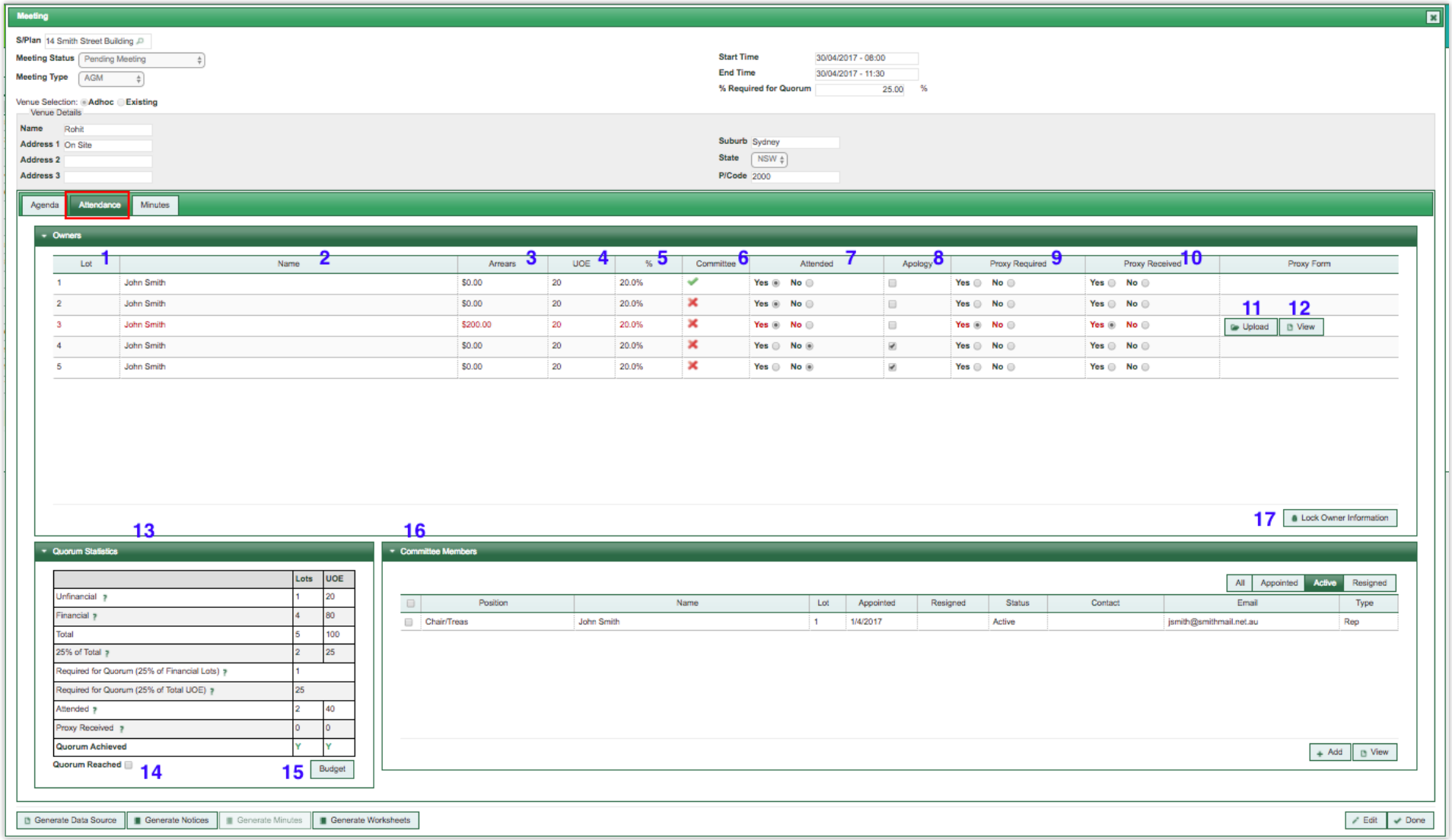


Meeting Attendance

Go to ‘To Do> Meetings> +Add’

Fill in meeting details> Click Save

Go to ‘Attendance’ Tab as shown below



1. Lots attached to the building

Please Note: If you double click on the 'Lot #', this will open up the Lot Card to view the Lot Owners Information.

2. Owner name as per the lot card

   Please Note: This field is editable by double clicking. This allows the user to log the "Attendee" name correctly rather than the full Lot Owner name E.g. Dominic Matthews rather than D & R Matthews. This will only edit the Attendance screen and will not override the Lot Card Owner Details.

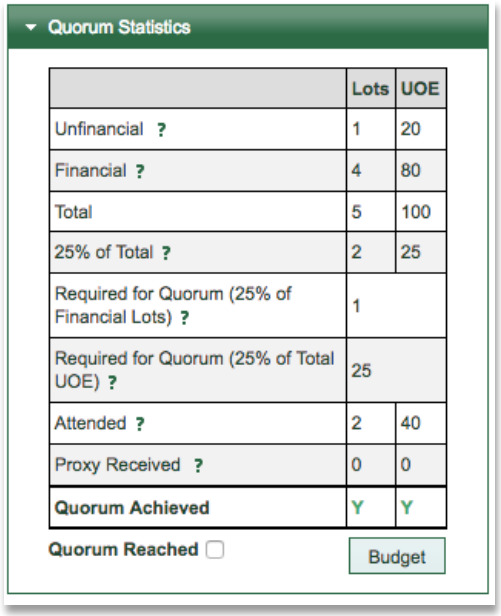
3. Arrears
   - Lot Arrears in the attendance are from the 'closing' column of the owners position screen and/or the 'balance' column of the owners ledger (i.e. it needs to take into account any credit amounts that the lot may have).
   - 'Unfinancial lot owners' who have arrears will show in red text.
   - 'Financial lot owners' who are not in arrears as at today will show in black text.
4. **UOE**- Lots UOE
5. **UOE %-** Percentage of Lot's UOE
6. **Committee**- If an Owner is a 'Committee Member', there will be a 'Green Tick', or else a 'Red Cross'.
7. **Attended**- User can answer 'Yes' or 'No' if Owner of the lot attended the meeting or not.
8. **Apology**- If Lot Owner hasn't attended the meeting and has send an 'Apology' the user can mark this 'Yes', else 'No'.
9. **Proxy Required**- If a Lot requires a "Proxy" ie. A Company owned lot, a user can mark 'Yes' or 'No' accordingly.
10. **Proxy Received**- If a Lot owner presented a 'Proxy Form' a user can mark 'Yes' or else 'No'.
11. **Proxy Form- Upload**- User can upload 'Proxy Form' sent by Lot Owner using 'Upload' button.

    Please Note: This only appears if 'Yes' to Proxy Received has been selected.

12. **Proxy Form- View**- User can view 'Proxy Form' by clicking on 'View button'.

    Please Note: This only appears if a Proxy Form has been uploaded,

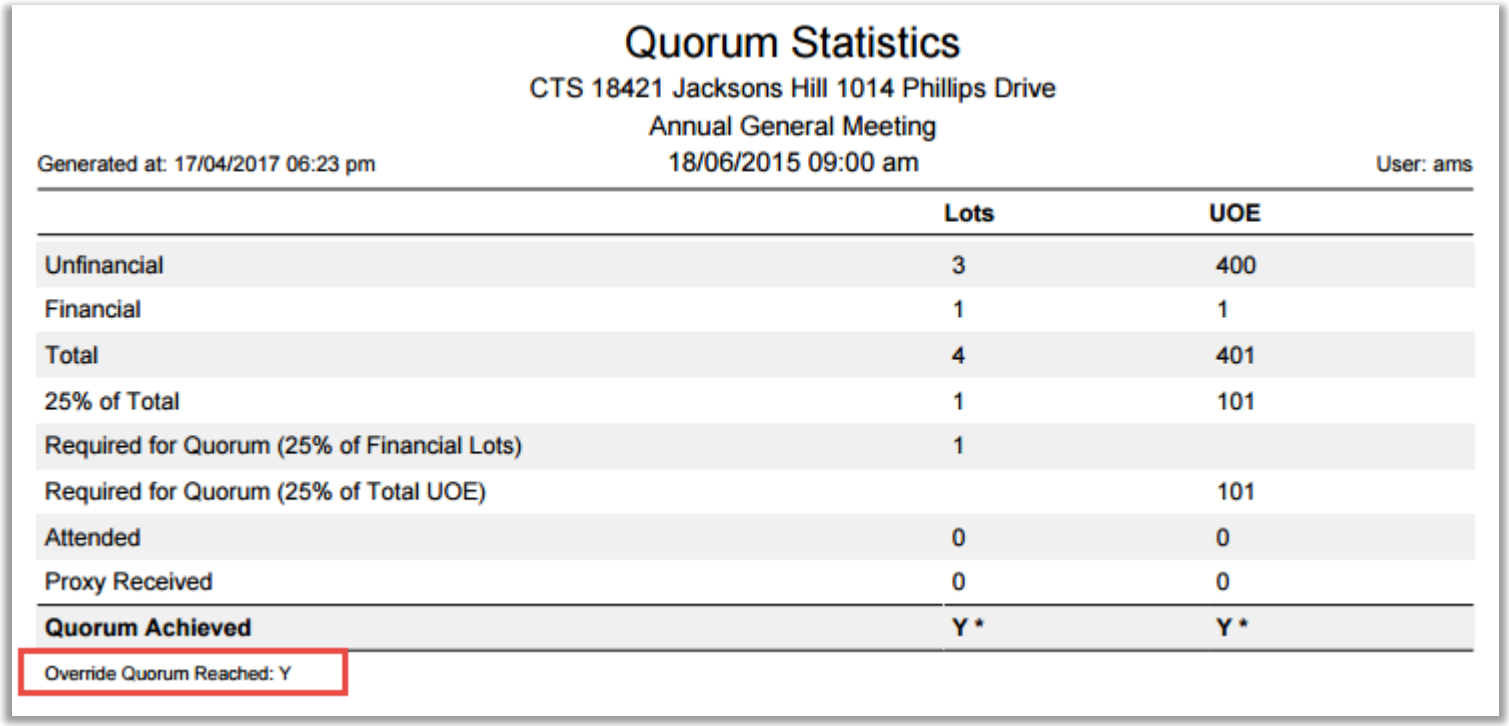
13. Quorum Statistics-



- Unfinancial- The number of lots owners that are in arrears and the sum of their UOE.
- Financial- The number of lots owners that are not in arrears and the sum of their UOE.
- 25% of Total- The percentage of total, rounded up to nearest whole number.
- Required for Quorum (25% of Financial Lots)- The number of financial lot owners that are required to attend for a Quorum.
- Required for Quorum (25% of Total UOE)- The total UOE required for a Quorum.
- Attended- The number of financial lots (and the sum of their UOE) that are in attendance.
- Proxy Received- The number of financial lots (and the sum of their UOE) that have had a proxy form received.

14. Quorum Reached- User can override the Quorum Achieved (If Quorum wasn't achieved) by checking the check box,

but Quorum Statistics report will show ‘Override Quorum Reached: Y’



Quorum Statistics

CTS 18421 Jacksons Hill 1014 Phillips Drive

Annual General Meeting

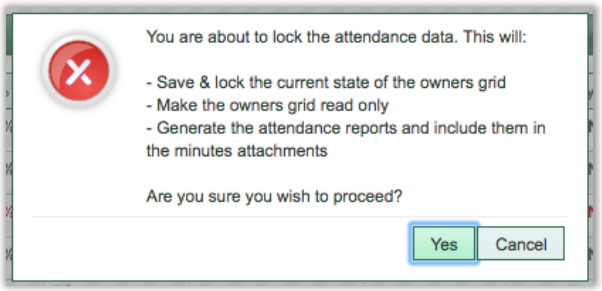
Generated at: 17/04/2017 06:23 pm — 18/06/2015 09:00 am — User: ams

	Lots	UOE
Unfinancial	3	400
Financial	1	1
Total	4	401
25% of Total	1	101
Required for Quorum (25% of Financial Lots)	1	
Required for Quorum (25% of Total UOE)		101
Attended	0	0
Proxy Received	0	0
Quorum Achieved	**Y ***	**Y ***

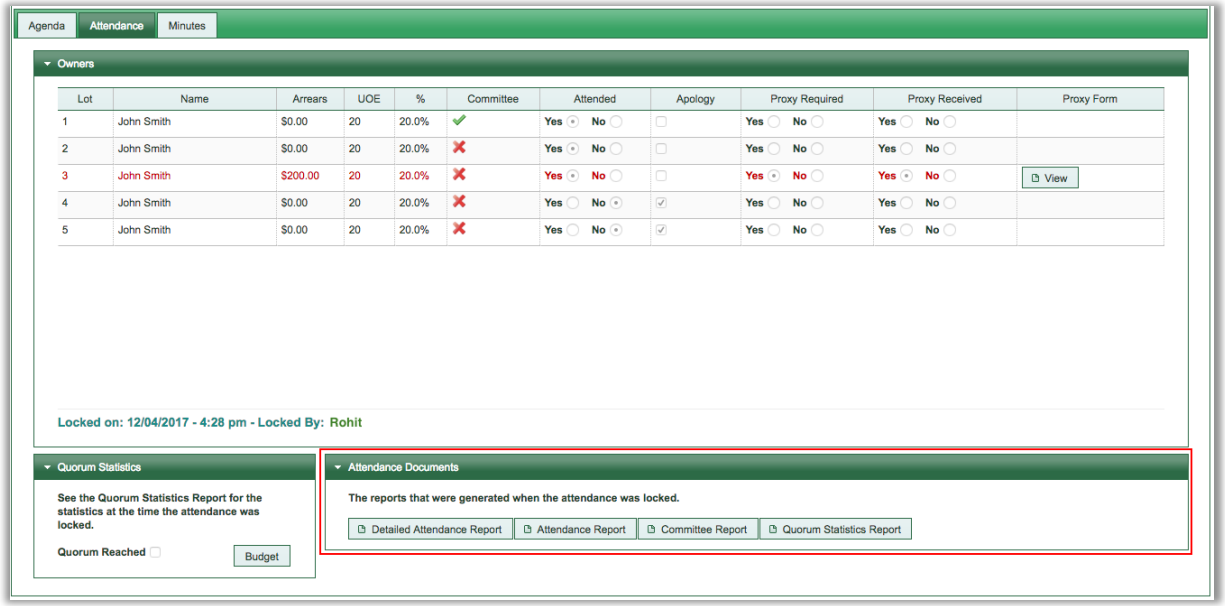
Override Quorum Reached: Y

15. **Budget-** When a user clicks on the ‘Budget’ button, the budget screen will open allowing a user to modify and accept the proposed budget.
16. **Committee Members**- a user can ‘+Add’, ‘View’, ‘Edit’ & ‘Remove’ Committee Members of the building from this section.

17. **Lock Owner Information**- Once Owner Information is locked, it can't be edited any longer (Only PropertyIQ Support can do this) and users will be prompted with a warning pop-up as shown below:

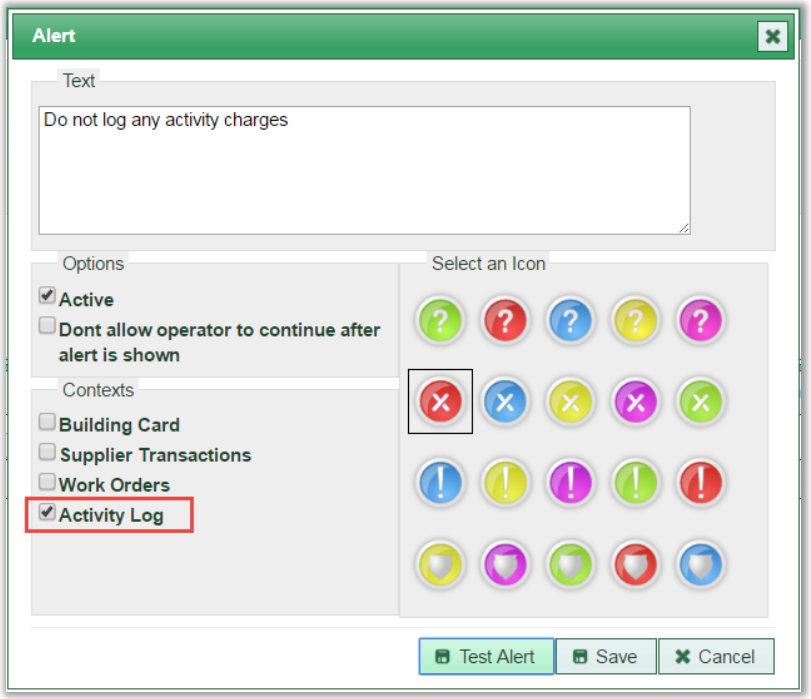


Once a user clicks on 'Yes' in the above screen and locks the attendance data, 'Attendance Documents' will be generated as shown below:

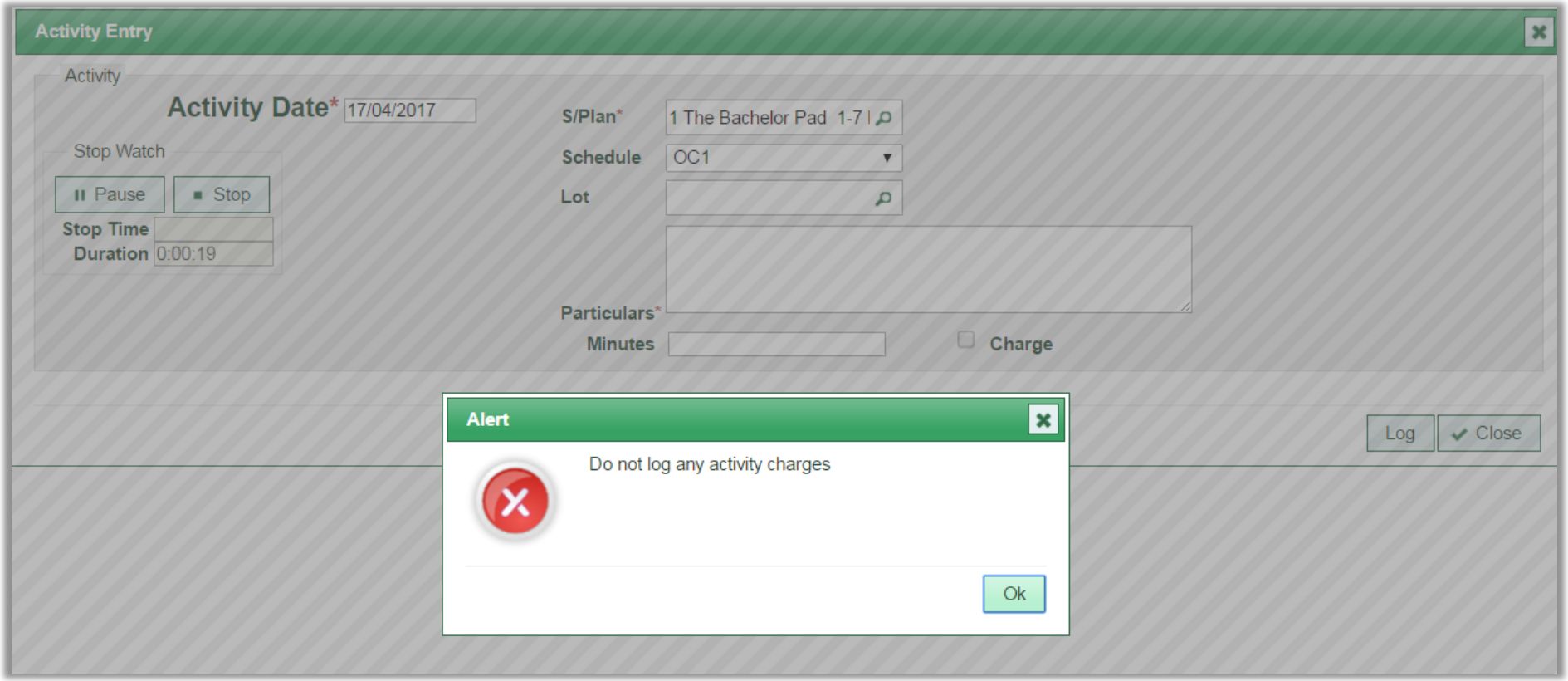


Add ability to assign a building alert to the activity entry screen

- Go to File> Buildings> Building card > Alerts tab > Add / Edit an alert will allow user to set the alert context to the 'Activity Log'



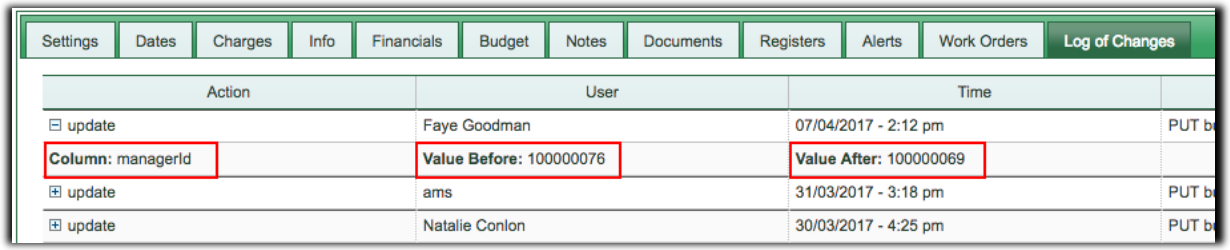
- If a building has an active alert with its context set to 'Activity log' and that building is selected when adding a new activity log, the user will see the alert.



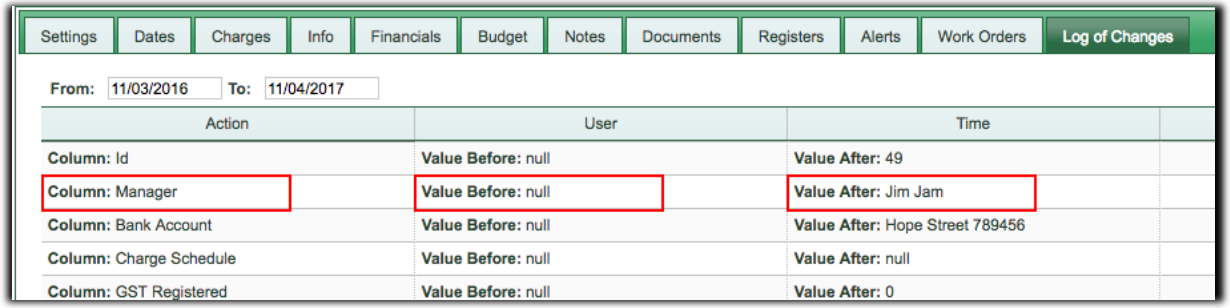
User Friendly Values in 'Log of Changes'

We have changed how values appear in Audit Trail to make them user friendly and easy to understand for user.

How Log of Changes values looked before

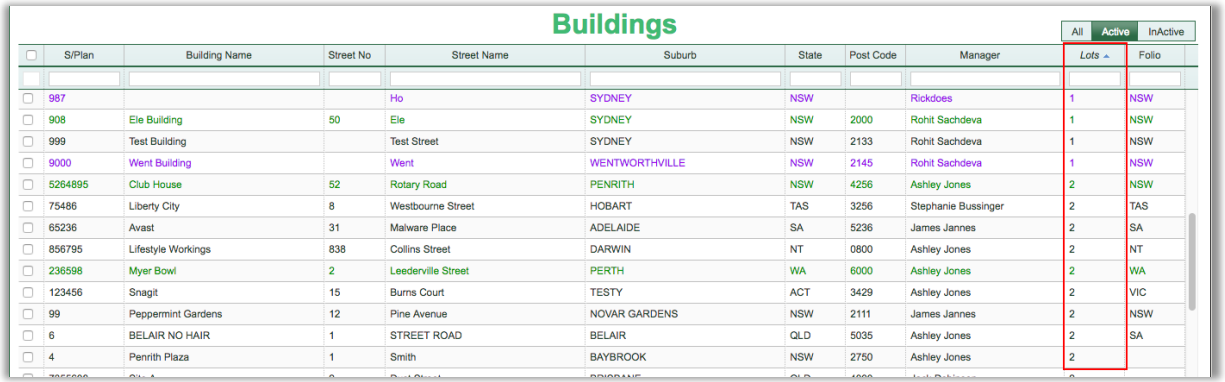


How Log of Changes values look after the change



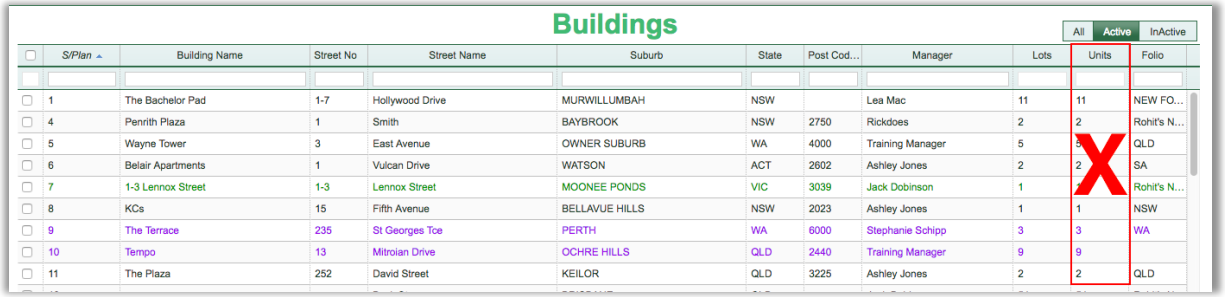
Add the ability to sort on the Lot # column on the buildings screen

User can now sort on the number of lots within each building by clicking on the lot column within FILE>BUILDINGS



	S/Plan	Building Name	Street No	Street Name	Suburb	State	Post Code	Manager	Lots	Folio
	987			Ho	SYDNEY	NSW		Rickdoes	1	NSW
	908	Ele Building	50	Ele	SYDNEY	NSW	2000	Rohit Sachdeva	1	NSW
	999	Test Building		Test Street	SYDNEY	NSW	2133	Rohit Sachdeva	1	NSW
	9000	Went Building		Went	WENTWORTHVILLE	NSW	2145	Rohit Sachdeva	1	NSW
	5264895	Club House	52	Rotary Road	PENRITH	NSW	4256	Ashley Jones	2	NSW
	75486	Liberty City	8	Westbourne Street	HOBART	TAS	3256	Stephanie Bussinger	2	TAS
	65236	Avast	31	Malware Place	ADELAIDE	SA	5236	James Jannes	2	SA
	856795	Lifestyle Workings	838	Collins Street	DARWIN	NT	0800	Ashley Jones	2	NT
	236598	Myer Bowl	2	Leederville Street	PERTH	WA	6000	Ashley Jones	2	WA
	123456	Snagit	15	Burns Court	TESTY	ACT	3429	Ashley Jones	2	VIC
	99	Peppermint Gardens	12	Pine Avenue	NOVAR GARDENS	NSW	2111	James Jannes	2	NSW
	6	BELAIR NO HAIR	1	STREET ROAD	BELAIR	QLD	5035	Ashley Jones	2	SA
	4	Penrith Plaza	1	Smith	BAYBROOK	NSW	2750	Ashley Jones	2	

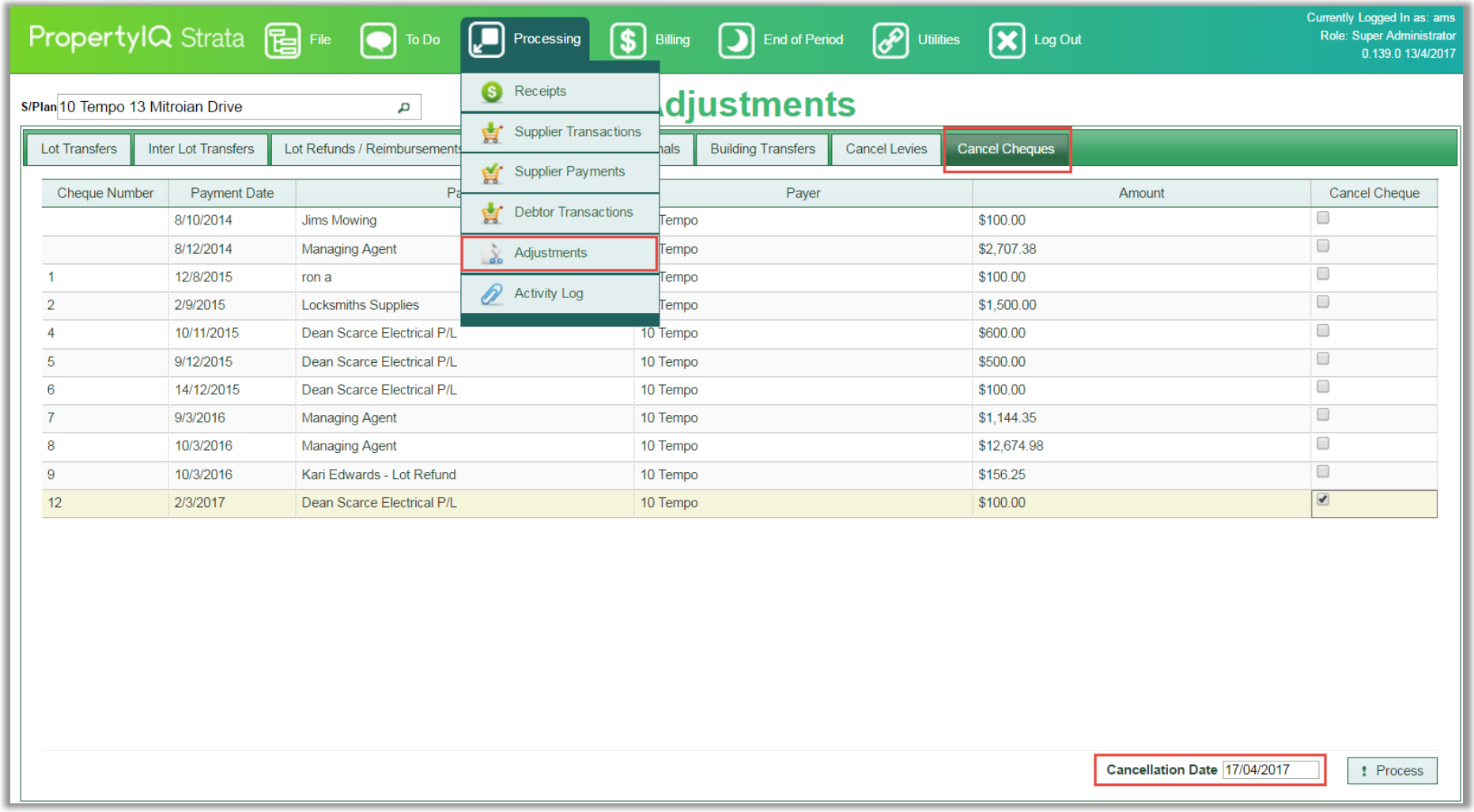
We have removed the ‘Units’ column from this grid (as it is always showing the same as the lots column)



	S/Plan	Building Name	Street No	Street Name	Suburb	State	Post Cod…	Manager	Lots	Units	Folio
	1	The Bachelor Pad	1-7	Hollywood Drive	MURWILLUMBAH	NSW		Lea Mac	11	11	NEW FO…
	4	Penrith Plaza	1	Smith	BAYBROOK	NSW	2750	Rickdoes	2	2	Rohit's N…
	5	Wayne Tower	3	East Avenue	OWNER SUBURB	WA	4000	Training Manager	5	5	QLD
	6	Belair Apartments	1	Vulcan Drive	WATSON	ACT	2602	Ashley Jones	2	2	SA
	7	1-3 Lennox Street	1-3	Lennox Street	MOONEE PONDS	VIC	3039	Jack Dobinson	1	1	Rohit's N…
	8	KCs	15	Fifth Avenue	BELLAVUE HILLS	NSW	2023	Ashley Jones	1	1	NSW
	9	The Terrace	235	St Georges Tce	PERTH	WA	6000	Stephanie Schipp	3	3	WA
	10	Tempo	13	Mitroian Drive	OCHRE HILLS	QLD	2440	Training Manager	9	9	
	11	The Plaza	252	David Street	KEILOR	QLD	3225	Ashley Jones	2	2	QLD

Added ‘Cancellation Date’ field to ‘Cancel Cheques’ window.

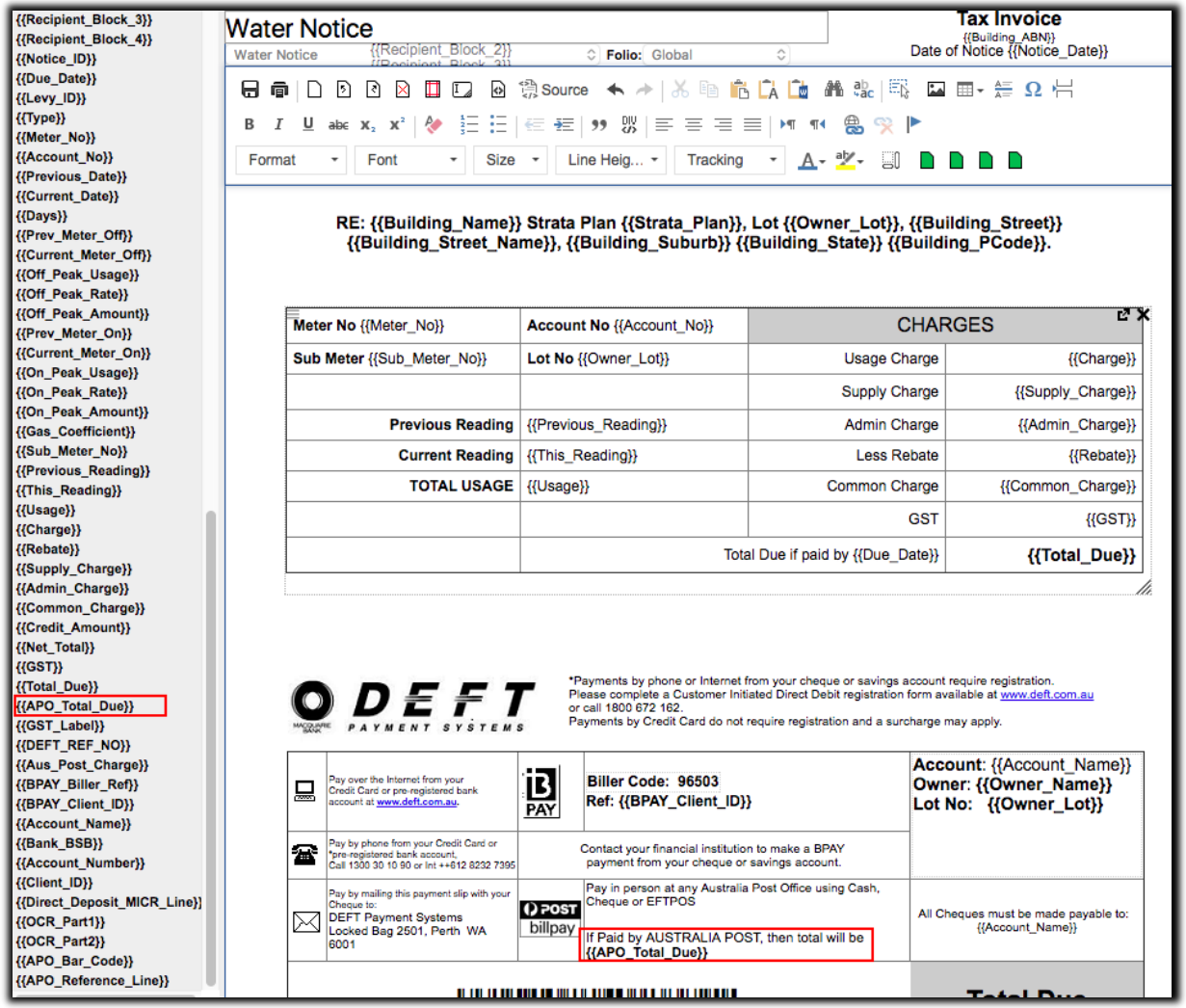
Go to ‘Processing> Adjustments> Cancel Cheques> Cancellation Date’



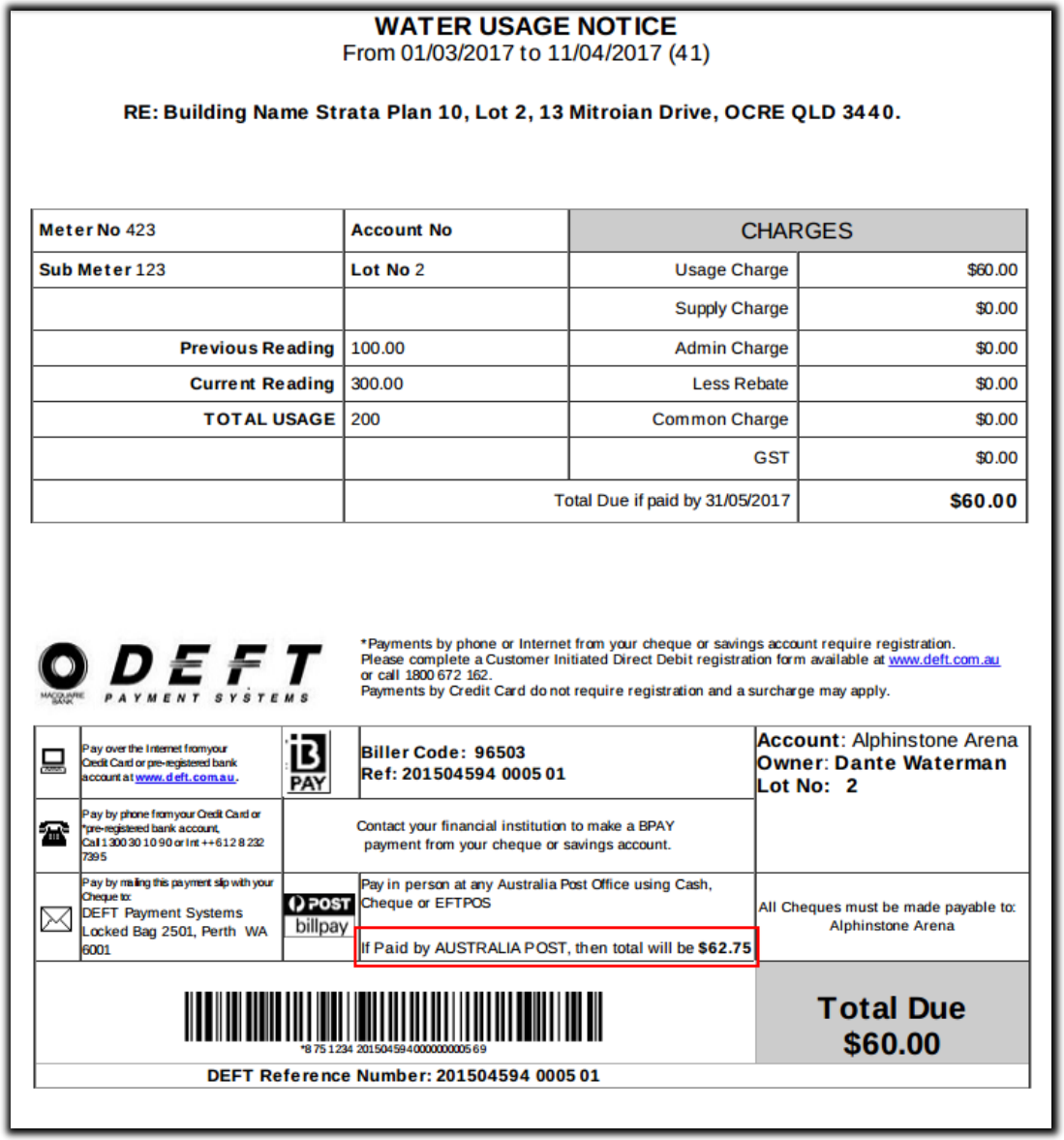
Created new merge field called {{APO_Total_Due}}

We have added a new merge field to be included on the Reminder, arrears, legal, final, special and utility invoices that merges that total due of the invoice plus the $2.75 APO charge.

For eg. Go to File> Template >Water
User can add {{APO_Total_Due}} to the template



Then Go to Billing> Utility Invoice> Water> Fill in the required fields and Preview.



WATER USAGE NOTICE

From 01/03/2017 to 11/04/2017 (41)

RE: Building Name Strata Plan 10, Lot 2, 13 Mitroian Drive, OCRE QLD 3440.

Meter No 423	**Account No**	CHARGES	
Sub Meter 123	**Lot No** 2	Usage Charge	$60.00
		Supply Charge	$0.00
Previous Reading	100.00	Admin Charge	$0.00
Current Reading	300.00	Less Rebate	$0.00
TOTAL USAGE	200	Common Charge	$0.00
		GST	$0.00
		Total Due if paid by 31/05/2017	**$60.00**

DEFT PAYMENT SYSTEMS

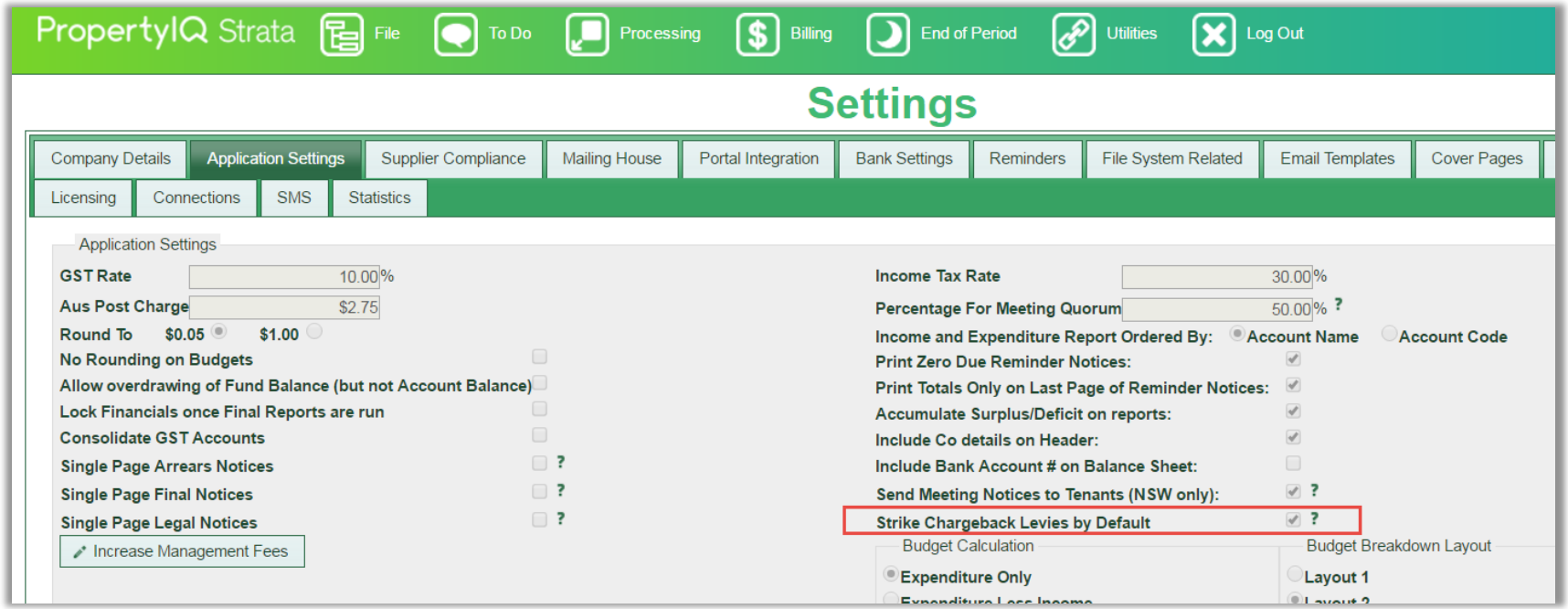
*Payments by phone or Internet from your cheque or savings account require registration.
Please complete a Customer Initiated Direct Debit registration form available at www.deft.com.au
or call 1800 672 162.
Payments by Credit Card do not require registration and a surcharge may apply.

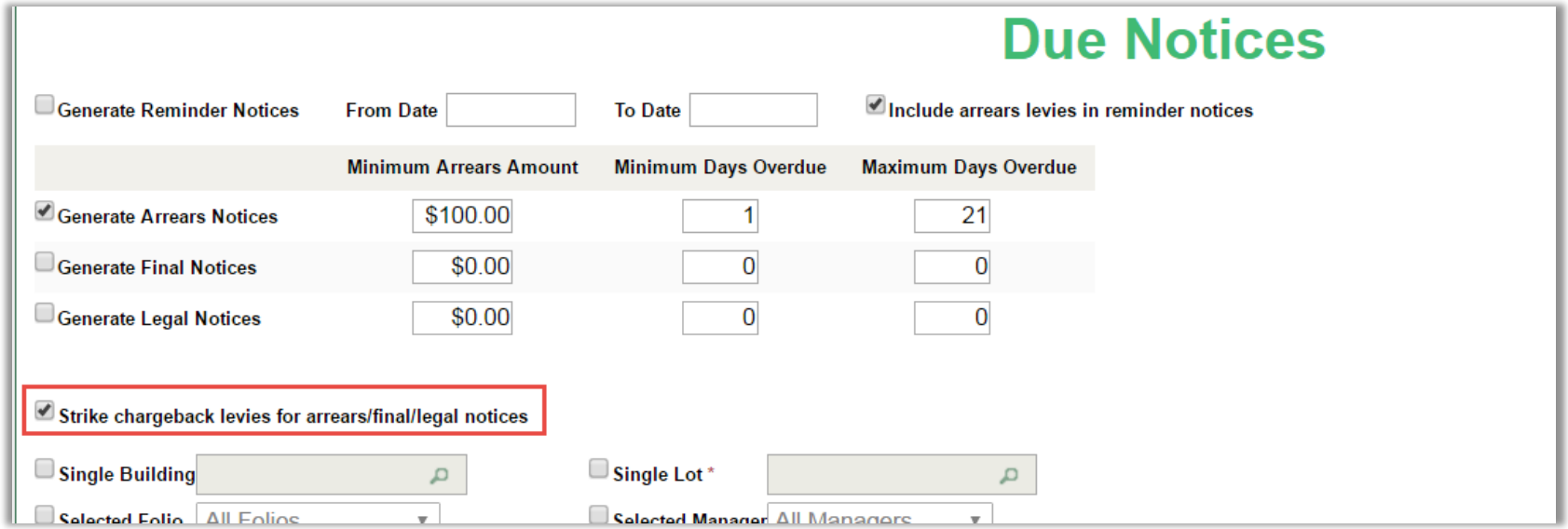
Pay over the Internet from your Credit Card or pre-registered bank account at www.deft.com.au.	**Biller Code: 96503** **Ref: 201504594 0005 01**	**Account**: Alphinstone Arena **Owner**: **Dante Waterman** **Lot No: 2**
Pay by phone from your Credit Card or *pre-registered bank account, Call 1300 30 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 Locked Bag 2501, Perth WA 6001	Pay in person at any Australia Post Office using Cash, Cheque or EFTPOS If Paid by AUSTRALIA POST, then total will be **$62.75**	All Cheques must be made payable to: Alphinstone Arena
*8 75 1234 201504594000000000569		**Total Due $60.00**

DEFT Reference Number: 201504594 0005 01

Create a setting for "Strike Charge Back"

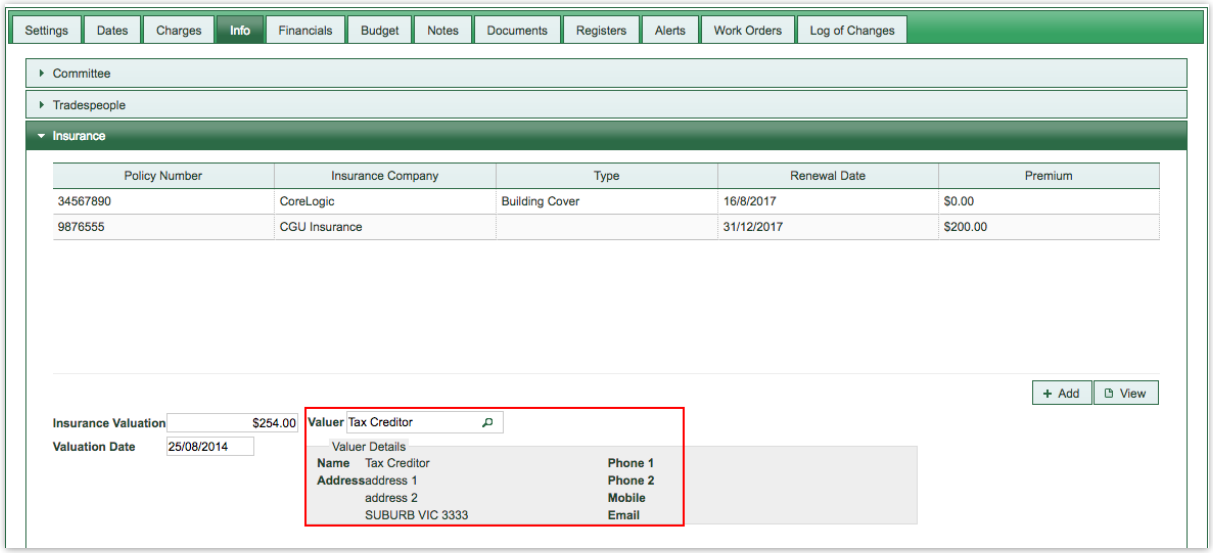
If ticked in ‘Settings’, then ‘Strike charge back levies for Arrears/Final/Legal Notices’ will be checked by default.



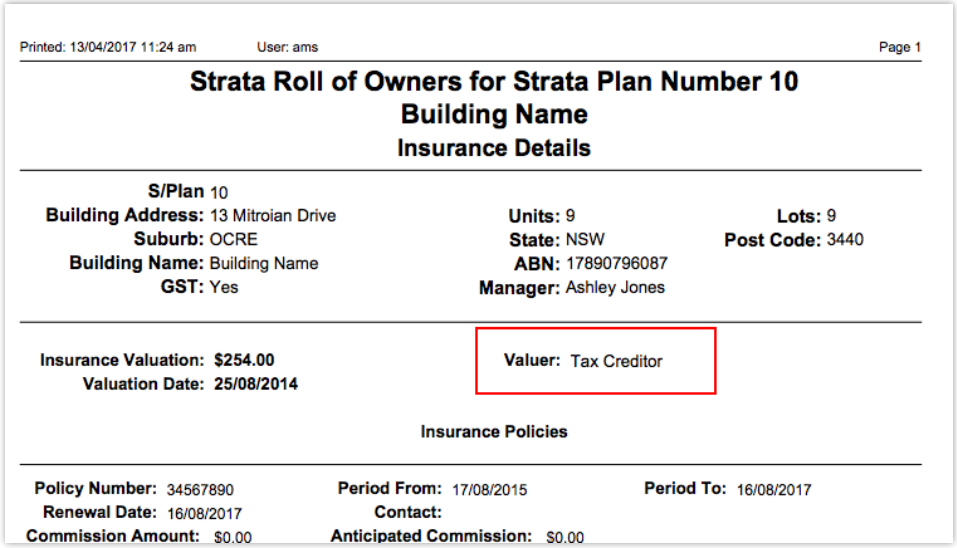


Added Insurance Valuer On Strata Roll

Go to FILE->BUILDINGS->Select a building->EDIT->INFO->INSURANCE->Select a Valuer->SAVE

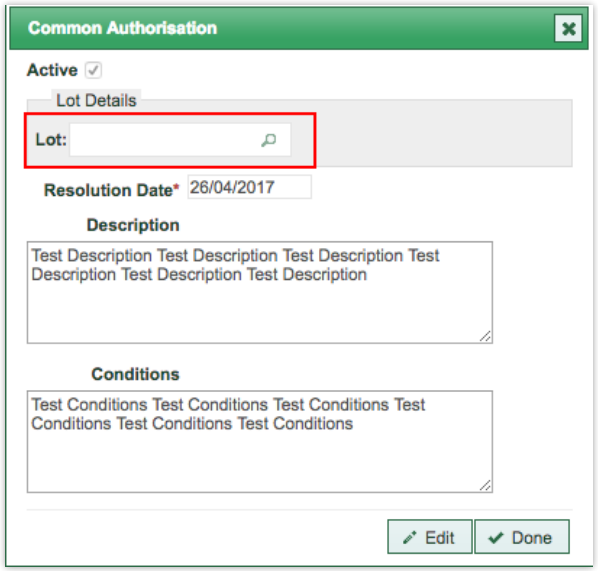


Go to END OF PERIOD->REPORTING->STRATA ROLL->Select the building->GENERATE

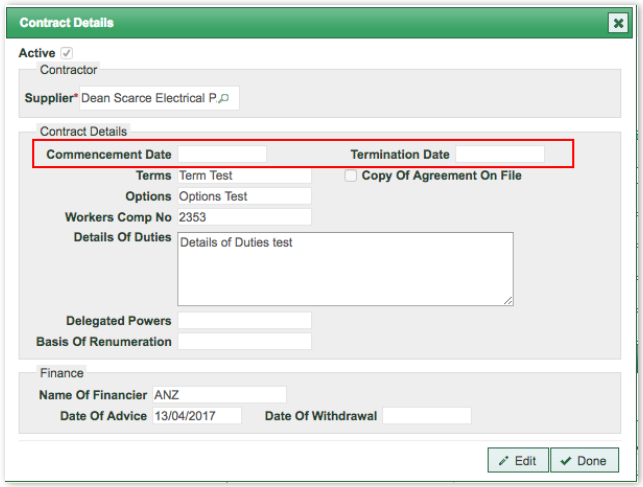


Remove mandatory fields for Registers

In Building Registers, ‘Lot’ field is no longer a mandatory field for ‘Common Authorisations’
Go to FILE->BUILDINGS->Select a building->REGISTERS> Common Authorisations



In Building Registers, ‘Commencement Date’ and ‘Termination Date’ are no longer a mandatory field in Contracts register
Go to FILE->BUILDINGS->Select a building->REGISTERS> Contract Details

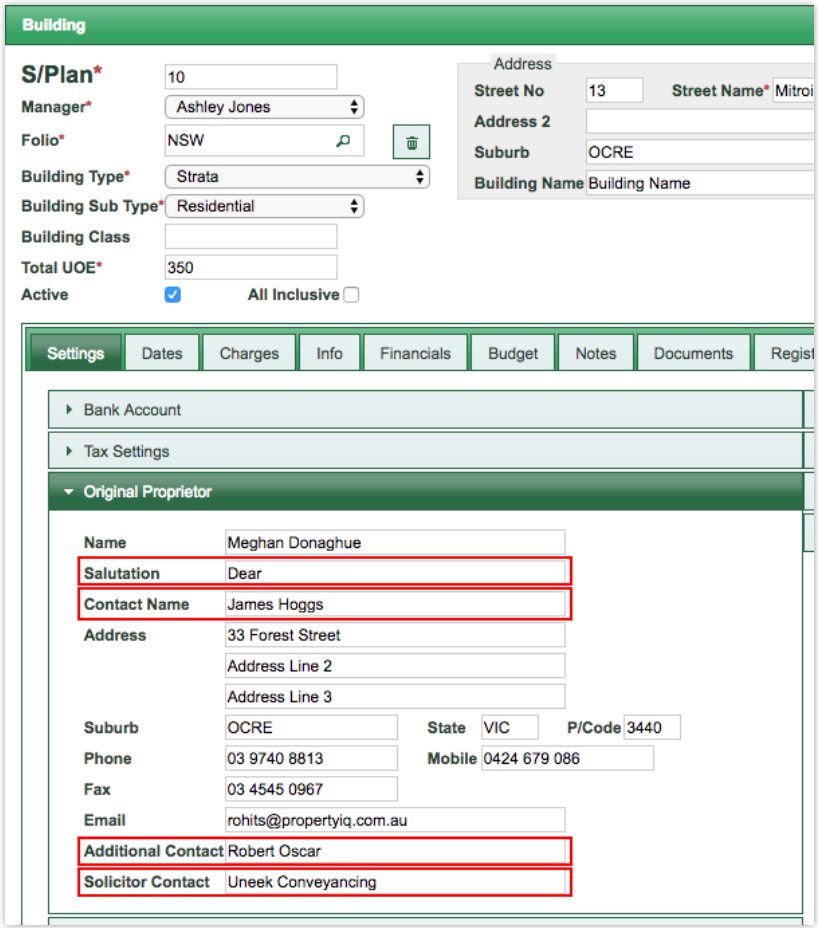


New extra fields for Original Proprietor

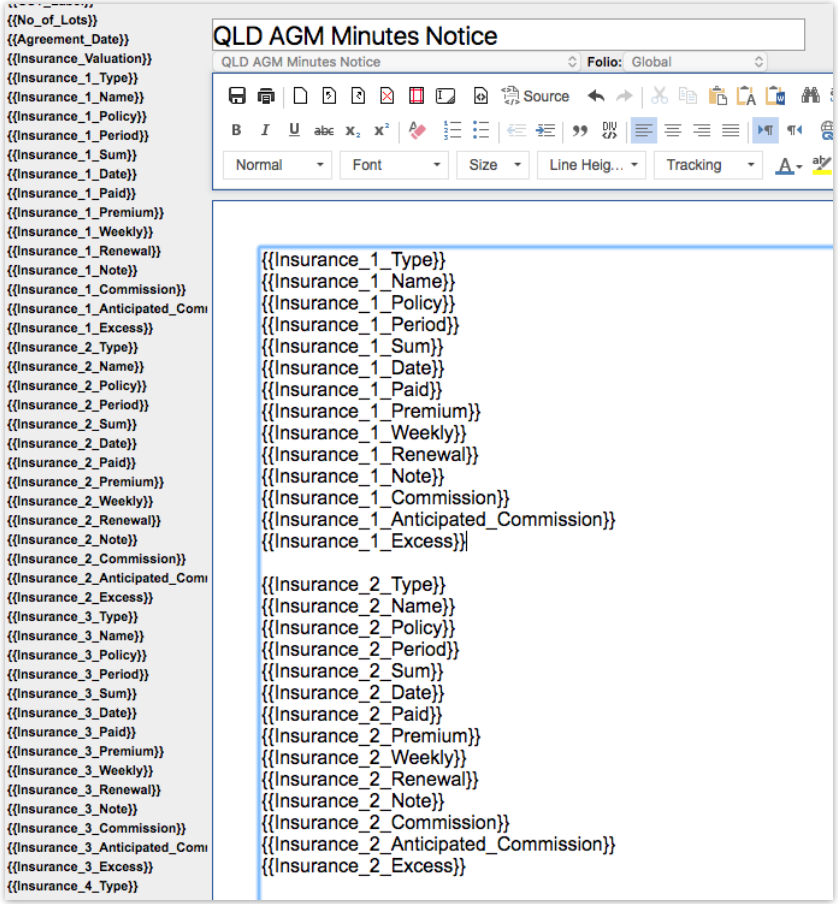
We have now added four new fields under Original Proprietor.

User can go to FILE->BUILDINGS->Select a building->EDIT->ORIGINAL PROPRIETOR

- Contact Name
- Salutation
- Additional Contact
- Solicitor Contact



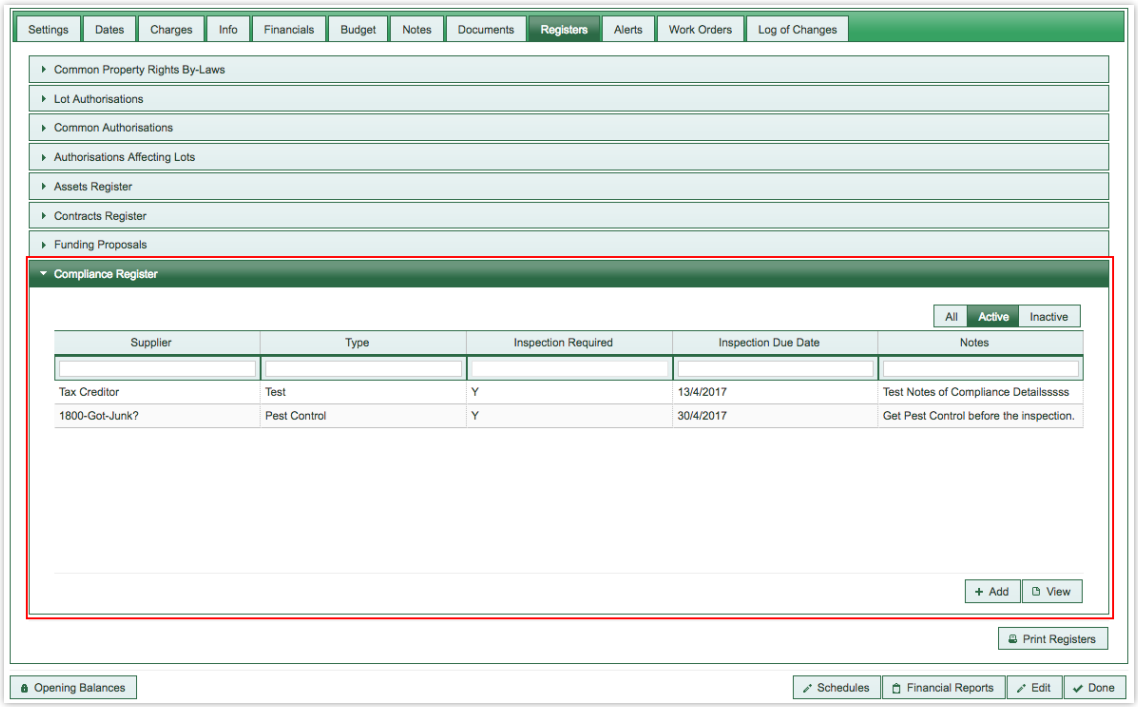
Insurance merge fields are also available within the Minutes Templates



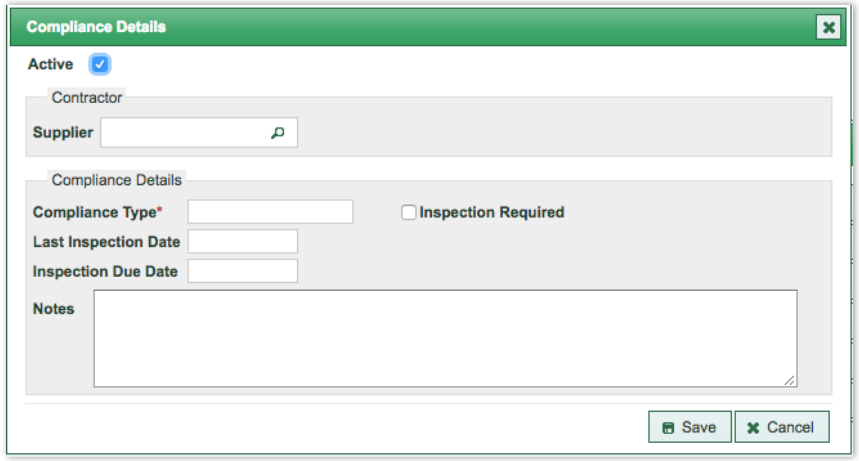
Compliance Register

- User can access ‘Compliance Register’ from:

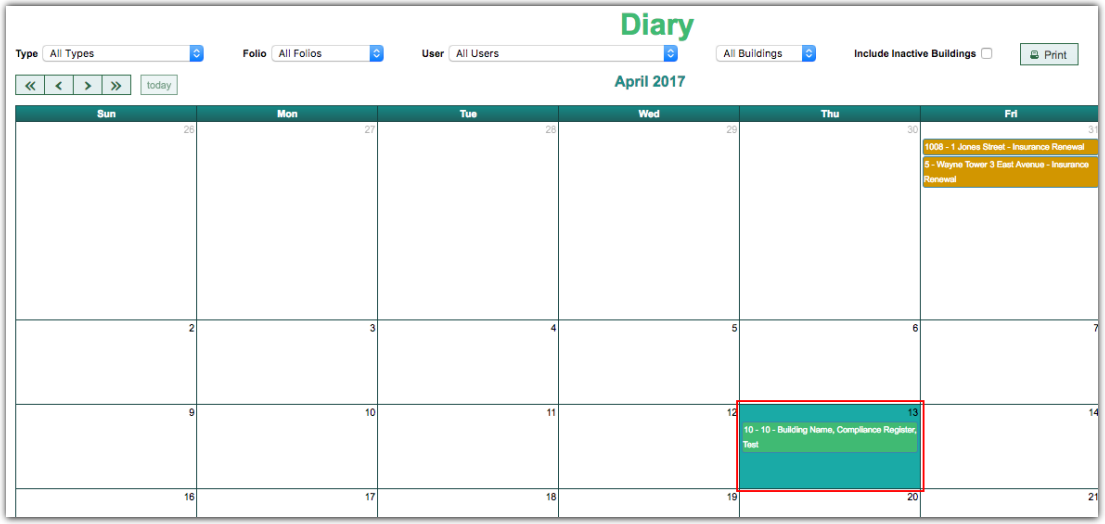
  FILE->BUILDINGS> Select a building>REGISTERS> "Compliance Register"



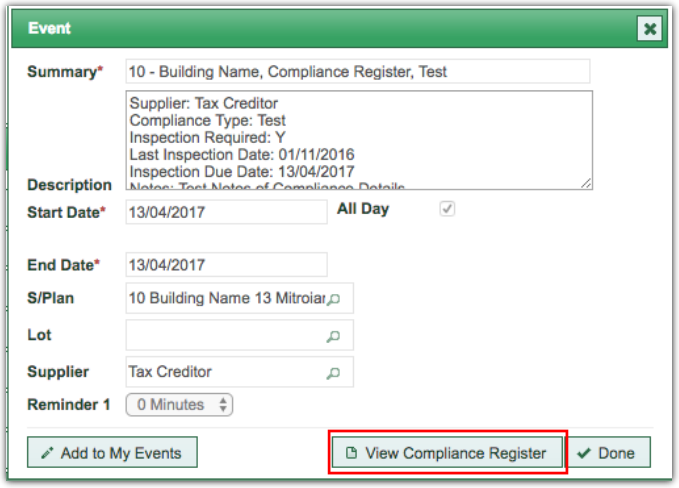
- Click ‘+Add’ and it will pop up a screen for a new Compliance register> Fill in the details> Save.



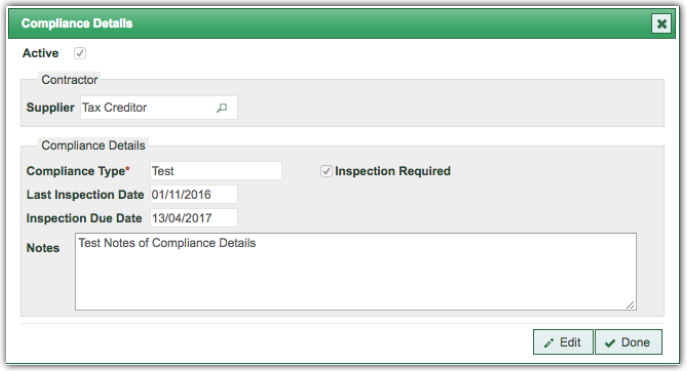
- Once a new Compliance is added, it’ll show in the ‘Diary’ Section



- User can open the event from Diary and it'll popup with details like show below



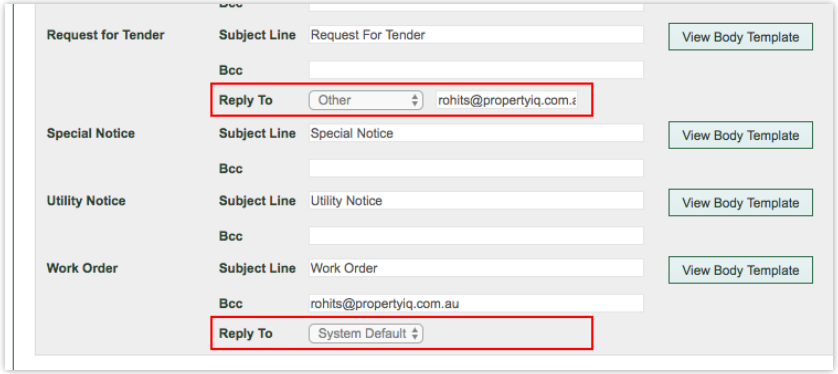
- User can click on 'View Compliance Register' to view Compliance Details as below.



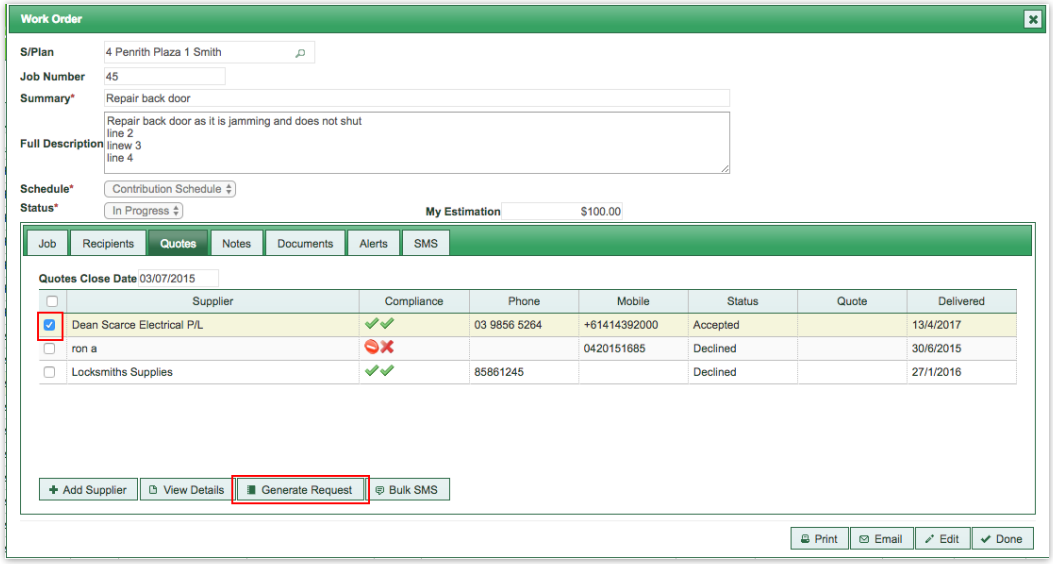
Please Note: We will be releasing in the next version the ability to print these items from within the Diary Report and Register Reports.

We have added a "Reply To" drop down in Email Templates for ‘Work orders’ & ‘Request for Tender’

Go to UTILITIES >SETTINGS >EMAIL TEMPLATES >EDIT > User can see "Reply to" under "Request for tender" and "Work Order".



Go to ‘TO DO > WORK ORDERS > Select a work order-> QUOTES > Tick a supplier > GENERATE REQUEST > EMAIL TENDER REQUEST.



Open the email that was sent, and click "Reply to", this will correspond to the option selected from ‘Settings >Email templates’