PropertyIQ

Release Notes

April 2023

TABLE OF CONTENTS

Table of Contents **1**

Summary **2**

Email templates 2

Reporting 2

Info Certificates 3

General 3

Detailed **4**

Item 1 – Email template merge fields 4

New merge fields 4

Item 3 - OC Certificate - New data fields (VIC) 8

Use new data fields & Update OC Certificate template 8

SUMMARY

EMAIL TEMPLATES

1. **Email template merge fields** – New merge fields have been added to all remaining email templates, allowing you to personalise and customise emails issued from PropertyIQ. Merge fields now available for annual levy notice, utility notice, insurance claim, meeting, supplier compliance, debtor invoice, debtor statement, financial reports, invoice approval.

   The merge fields can be used within the email subject and/or body. See a full list of the new merge fields below.

   ! **What you need to do**

   You'll need to manually update your email templates to include any merge fields of your preference. This can be done easily by editing the relevant email template under *File>Templates>Standard Email Templates screen* and selecting the merge field/s from the list of available fields.

   Important note for invoice approval template

   - The **email subject field** will continue to be pre-populated with the following; [Template Subject] [CTS/SP/OC label] [CTS/SP/OC number]. This is current system behaviour.
   - You can still update the email subject if there's additional merge fields you want to include, however any additional information will appear in **front** of the pre-populated text.

REPORTING

2. **Arrears report –** Improvements have been made to the arrears report under *Reporting>Lot>Arrears List* to allow filtering of the report by a building schedule. Changes include:
   - New report filter – For a building with more than one active schedule, you'll see a new filter that's positioned next to the building filter, that'll allow you to select a single schedule.
     - The filter options will display *All Schedules* and a list of all active schedules in the building. *All Schedules* will be selected by default.
     - When selecting a single schedule, the PDF report will generate with the schedule name in the report header and will only show transactions and balances related to the selected schedule.
   - New column in export file - A new column in the CSV export called "schedule name" has been added, positioned between the existing building name and manager name columns.

INFO CERTIFICATES

3. **(VIC) OC Certificate - New data fields –** To improve efficiency and better assist Victorian clients with their disclosure requirements, five (5) new data fields on the building card have been added for buildings in Victoria. Each data field has a new corresponding merge field that can be inserted into the Victorian OC Certificate template and will allow this information to be pre-filled for each certificate generated.
    - New accordion under *Building card>Info tab* called "Info Certificate" where you can record information that needs to be disclosed on all OC Certificates.
    - New data fields available under *Building card>Info tab>Info Certificate accordion*. Each field is blank by default and has a character limit of 800 characters.
        - **Repairs & Maintenance** – Here you can record details of any repairs, maintenance or other work that has been or is about to be performed that may incur additional charges. Any information entered here will be shown in the new merge field {{Building_Repairs}} in the OC Certificate template.
        - **Liabilities** - Here you can record details of any liabilities and contingent liabilities of the OC. Any information entered here will be shown in the new merge field {{Building_Liabilities}} in the OC Certificate template.
        - **Notices & Orders** - Here you can record details of any notices or orders served on the OC in the last 12 months that haven't been satisfied. Any information entered here will be shown in the new merge field {{Building_Orders}} in the OC Certificate template.
        - **Legal Proceedings** - Here you can record details of any legal proceedings to which the OC is a party and any circumstances the OC is aware that are likely to give rise to proceedings. Any information entered here will be shown in the new merge field {{Building_Proceedings}} in the OC Certificate template.
        - **Other Information** - Here you can record any other details or general information that may need to be disclosed by the OC. Any information entered here will be shown in the new merge field {{Building_Other_Info}} in the OC Certificate template.
    - New merge fields available under *File>Templates>Standard Email Templates>VIC>OC Certificate template.* The 5 new merge fields are called {{Building_Repairs}}, {{Building_Liabilities}}, {{Building_Orders}}, {{Building_Proceedings}} and {{Building_Other_Info}}. There are available in the merge field list for you to use in your OC Certificate template as required.

    ! **What you need to do**

    To use these new data fields and have the information appear in your OC Certificates, you'll have to:
    1. Enter details in the new data fields for each OC (where required) on the *Building card>Info tab>Info Certificates accordion*.
    2. Manually update your OC Certificate template/s to insert the new merge fields where appropriate. This can be done easily by editing your OC Certificate template under *File>Templates>Standard Email Templates screen*.

    Refer below for screenshots and instructions on updating your template/s.

GENERAL

4. **(VIC) Secondary lots –** An issue has been fixed with the sub-category of secondary lots being assigned as 'car park' even when secondary lots feature is disabled. Historical data has been cleaned up for existing lots to remove the sub-category type where the feature is disabled to avoid future misclassification.
5. **Bulk credit transfer screen** – An issue has been fixed on the bulk credit transfer screen, where selecting all buildings then de-selecting some buildings would not respect the de-selections and the transfers process would still run for all buildings.

DETAILED

ITEM 1 – EMAIL TEMPLATE MERGE FIELDS

New merge fields have been added to all remaining email templates, allowing you to personalise and customise emails issued from PropertyIQ. Merge fields now available for annual levy notice, utility notice, insurance claim, meeting, supplier compliance, debtor invoice, debtor statement, financial reports, invoice approval.

The merge fields can be used within the email subject and/or body. See a full list of the merge fields below.

! What you need to do

You'll need to manually update your email templates to include any merge fields of your preference. This can be done easily by editing the relevant email template under *File>Templates>Standard Email Templates screen* and selecting the merge field/s from the list of available fields.

Important note for invoice approval template

- The **email subject field** will continue to be pre-populated with the following; [Template Subject] [CTS/SP/OC label] [CTS/SP/OC number]. This is current system behaviour.
- You can still update the email subject if there's additional merge fields you want to include, however any additional information will appear in **front** of the pre-populated text.

NEW MERGE FIELDS

Available in all templates (annual levy notice, utility notice, insurance claim, meeting, supplier compliance, debtor invoice, debtor statement, financial reports, invoice approval)

Merge Field	Data Source / Definition
Agent_Name	Settings -> Company Name (global or folio)
Agent_Principal	Settings -> Principal (global or folio)
Agent_Address_1	Settings -> Address line 1 (global or folio)
Agent_Address_2	Settings -> Address line 2 (global or folio)
Agent_Address_3	Settings -> Address line 3 (global or folio)
Agent_Suburb	Settings -> Suburb (global or folio)
Agent_State	Settings -> State (global or folio). Formatted as uppercase
Agent_PCode	Settings -> P/Code (global or folio)
Agent_Email	Settings -> Email (global or folio)
Agent_Phone	Settings -> Phone (global or folio)
Agent_Fax	Settings -> Fax (global or folio)
Agent_ABN	Settings -> ABN (global or folio)
Strata_Plan	Building -> SP/CTS/OC number. No formatting
Building_Name	Building -> Building Name
Building_Street_No	Building -> Street No
Building_Street_Name	Building -> Street Name
Building_Address_2	Building -> Address 2
Building_Suburb	Building -> Suburb

Building_State	Building -> State
Building_PCode	Building -> Post Code
Building_Manager	Building Manager's Name. See Building -> Manager, User -> Name.
Manager_Email	Building Manager's Email. See User -> Email.
Manager_Phone	Building Manager's Phone #1. See User -> (Ah).
Building_ABN	Building -> Tax Settings -> ABN
QLD_Plan	Building -> Plan (QLD buildings).
QLD_Type	Building -> Type (QLD buildings).

Additional merge fields - Annual notice & Utility notice

Unit_Owner	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Owner Name ▪ Notice to Committee Member (no linked lot): Committee Member -> Name
Owner_Lot	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Lot number
Owner_Unit	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Unit number
Lot_Street_No	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Street No
Lot_Street_Name	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Street Name
Recipient_Name	▪ Refer to Utility Notices accordion on Lot: Recipient → Name ▪ Refer to Annual Notices & Meeting Notices accordion on Lot: Recipient → Name
Disc_Rate	▪ Building -> Levy Discount -> Discount Rate. Unformatted, e.g. will merge 10 for discount rate of 10%
Int_Rate	▪ Building -> Owner Interest -> Interest Rate. Unformatted, e.g. will merge 10 for interest rate of 10%

Additional merge fields - Financial reports

Last_Fin_Yr_From	Current financial year start (Building -> Dates -> Fin Year). dd/mm/yyyy
Last_Fin_Yr_To	Current financial year end. dd/mm/yyyy
Next_Fin_Yr_From	Next financial year start (curr fin yr start + 1 yr). dd/mm/yyyy
Next_Fin_Yr_To	Next financial year end (curr fin yr end + 1 yr). dd/mm/yyyy
Next_Budget_Yr_From	Next levy year start (curr levy yr start + 1 yr). dd/mm/yyyy
Next_Budget_Yr_To	Next levy year end (curr levy yr end + 1 yr). dd/mm/yyyy
Total_Admin_Owner_Funds	Admin owners funds for all schedules, as at the financial year end date. See Balance Sheet Report (for current fin year period, consolidated) -> Total Owners Funds
Total_Sinking_Owner_Funds	Sinking owners funds for all schedules, as at the financial year end date. See Balance Sheet Report (for current fin year period, consolidated) -> Total Owners Funds
Total_Total_Owner_Funds	Admin + Sinking owners funds for all schedules, as at the financial year end date. See Balance Sheet Report (for current fin year period, consolidated) -> Total Owners Funds
Admin_Total_Budget	Sum of proposed budget for all schedules. Admin only. See Building -> Set Budget -> Amount to Collect
Sinking_Total_Budget	Sum of proposed budget for all schedules. Sinking only. See Building -> Set Budget -> Amount to Collect
Total_Total_Budget	Sum of proposed budget for all schedules. Admin + Sinking. See Building -> Set Budget -> Amount to Collect
Unit_Owner	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Owner Name ▪ Notice to Committee Member (no linked lot): Committee Member -> Name
Owner_Lot	Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Lot number

Owner_Unit	Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Unit number
Lot_Street_No	Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Street No
Lot_Street_Name	Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Street Name

Additional merge fields - Insurance claims

Unit_Owner	▪ Lot -> Owner Name
Owner_Lot	▪ Lot -> Lot number
Owner_Unit	▪ Lot -> Unit number
Lot_Street_No	▪ Lot -> Street No
Lot_Street_Name	▪ Lot -> Street Name

Additional merge fields - Invoice approvals

Supplier_Name	▪ From the Supplier record linked: Supplier -> Name
Supplier_Contact	▪ From the Supplier record linked: Supplier -> Contact
Supplier_Inv_Reference	▪ Supplier transaction/invoice -> Reference

Additional merge fields - Meetings

Last_Fin_Yr_From	Current financial year start (Building -> Dates -> Fin Year). dd/mm/yyyy
Last_Fin_Yr_To	Current financial year end. dd/mm/yyyy
Next_Fin_Yr_From	Next financial year start (curr fin yr start + 1 yr). dd/mm/yyyy
Next_Fin_Yr_To	Next financial year end (curr fin yr end + 1 yr). dd/mm/yyyy
Next_Budget_Yr_From	Next levy year start (curr levy yr start + 1 yr). dd/mm/yyyy
Next_Budget_Yr_To	Next levy year end (curr levy yr end + 1 yr). dd/mm/yyyy
Total_Admin_Owner_Funds	Admin owners funds for all schedules, as at the financial year end date. See Balance Sheet Report (for current fin year period, consolidated) -> Total Owners Funds
Total_Sinking_Owner_Funds	Sinking owners funds for all schedules, as at the financial year end date. See Balance Sheet Report (for current fin year period, consolidated) -> Total Owners Funds
Total_Total_Owner_Funds	Admin + Sinking owners funds for all schedules, as at the financial year end date. See Balance Sheet Report (for current fin year period, consolidated) -> Total Owners Funds
Admin_Total_Budget	Sum of proposed budget for all schedules. Admin only. See Building -> Set Budget -> Amount to Collect
Sinking_Total_Budget	Sum of proposed budget for all schedules. Sinking only. See Building -> Set Budget -> Amount to Collect
Total_Total_Budget	Sum of proposed budget for all schedules. Admin + Sinking. See Building -> Set Budget -> Amount to Collect
Unit_Owner	▪ Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Owner Name ▪ Notice to Committee Member (no linked lot): Committee Member -> Name
Owner_Lot	Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Lot number
Owner_Unit	Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Unit number
Lot_Street_No	Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Street No
Lot_Street_Name	Notice to lot owner, formal tenant, or Committee Member (linked to lot): Lot -> Street Name
Agreement_Date	Building -> Charges -> Contribution Schedule -> Fixed Charges -> Agency Agreement Date. dd/mm/yyyy

Disc_Rate	Building -> Levy Discount -> Discount Rate. Unformatted, e.g. will merge 10 for discount rate of 10%
Int_Rate	Building -> Owner Interest -> Interest Rate. Unformatted, e.g. will merge 10 for interest rate of 10%
Recipient_Name	▪ Notice to lot owner or Committee Member (linked to lot): Lot -> Delivery -> Annual Notices & Meeting Notices -> Name ▪ Notice to CM (no linked lot): Committee Member -> Name ▪ Notice to formal tenant (owner occupier): Lot -> Owner Name ▪ Notice to formal tenant (not owner occupier): Lot -> Tenant -> Name
Meeting_Day_Of_Week	▪ Meeting Start Time day of the week e.g. Tuesday
Meeting_Date	▪ Meeting -> Start Time (date portion) dd/mm/yyyy
Meeting_Time	▪ Meeting -> Start Time (time portion) e.g. 09:30 am
Meeting_Type	▪ Meeting -> Meeting Type (full display name). Uppercase. e.g. EXECUTIVE COMMITTEE MEETING

ITEM 3 - OC CERTIFICATE - NEW DATA FIELDS (VIC)

To improve efficiency and better assist Victorian clients with their disclosure requirements, five (5) new data fields on the building card have been added. Each data field has a new corresponding merge field that can be inserted into the Victorian OC Certificate template and will allow this information to be pre-filled for each certificate generated.

- **New accordion & data fields** under *Building card>Info tab>Info Certificate accordion* where you can record information that needs to be disclosed on all OC Certificates.
- **New merge fields** available under *File>Templates>Standard Email Templates>VIC>OC Certificate template.*
    - The 5 new merge fields are called {{Building_Repairs}}, {{Building_Liabilities}}, {{Building_Orders}}, {{Building_Proceedings}} and {{Building_Other_Info}}.
    - There are available in the merge field list for you to use in your OC Certificate template as required.

! What you need to do

To use these new data fields and have the information appear in your OC Certificates, you'll have to:

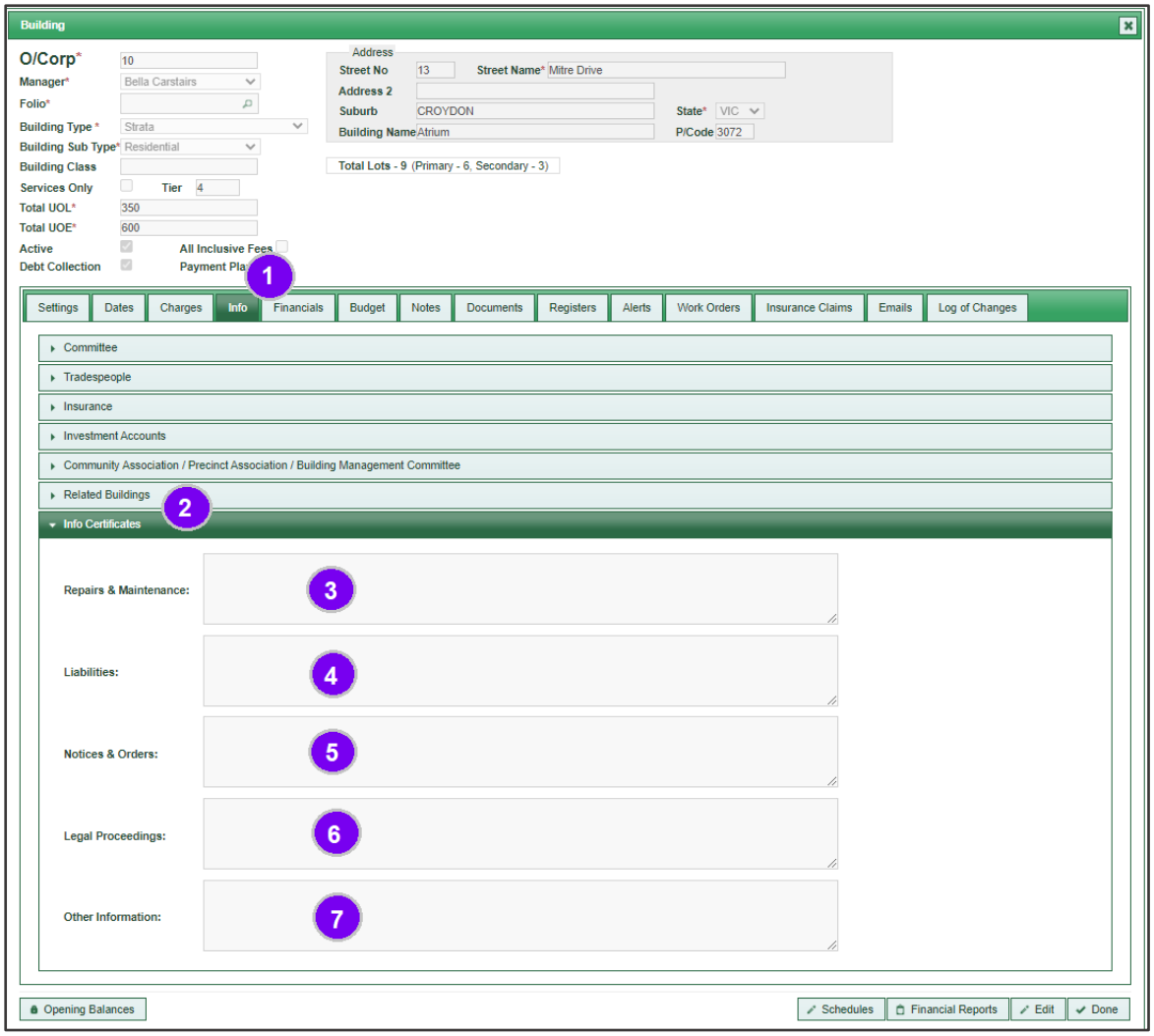
1. Enter details in the new data fields for each OC (where required) on the *Building card>Info tab>Info Certificates accordion*.
2. Manually update your OC Certificate template/s to insert the new merge fields where appropriate. This can be done easily by editing your OC Certificate template under *File>Templates>Standard Email Templates screen*.

View the below instructions on using the new data fields and adding the merge fields to your template/s.

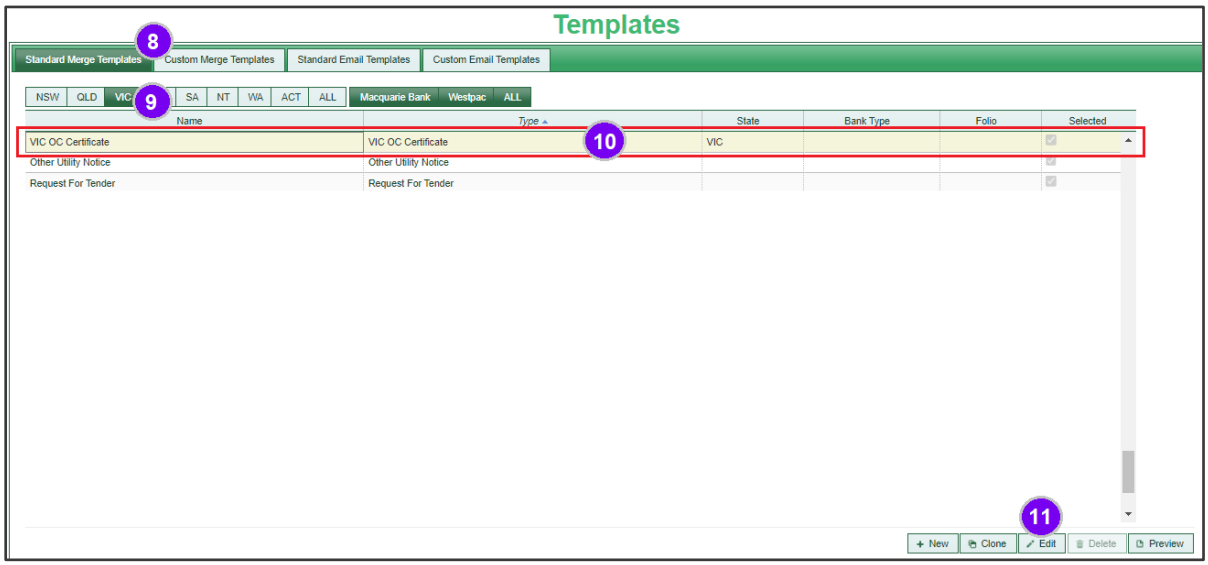
USE NEW DATA FIELDS & UPDATE OC CERTIFICATE TEMPLATE

1. On the building card, go to the *Info* tab
2. Click on the *Info Certificates* accordion
3. **Repairs and Maintenance** - Here you can record details of any repairs, maintenance or other work that has been or is about to be performed that may incur additional charges. Any information entered here will be shown in the new merge field {{Building_Repairs}} in the OC Certificate template.
4. **Liabilities** - Here you can record details of any liabilities and contingent liabilities of the OC. Any information entered here will be shown in the new merge field {{Building_Liabilities}} in the OC Certificate template.
5. **Notices & Orders** - Here you can record details of any notices or orders served on the OC in the last 12 months that haven't been satisfied. Any information entered here will be shown in the new merge field {{Building_Orders}} in the OC Certificate template.
6. **Legal Proceedings** - Here you can record details of any legal proceedings to which the OC is a party and any circumstances the OC is aware that are likely to give rise to proceedings. Any information entered here will be shown in the new merge field {{Building_Proceedings}} in the OC Certificate template.
7. **Other Information** - Here you can record any other details or general information that may need to be disclosed by the OC. Any information entered here will be shown in the new merge field {{Building_Other_Info}} in the OC Certificate template.

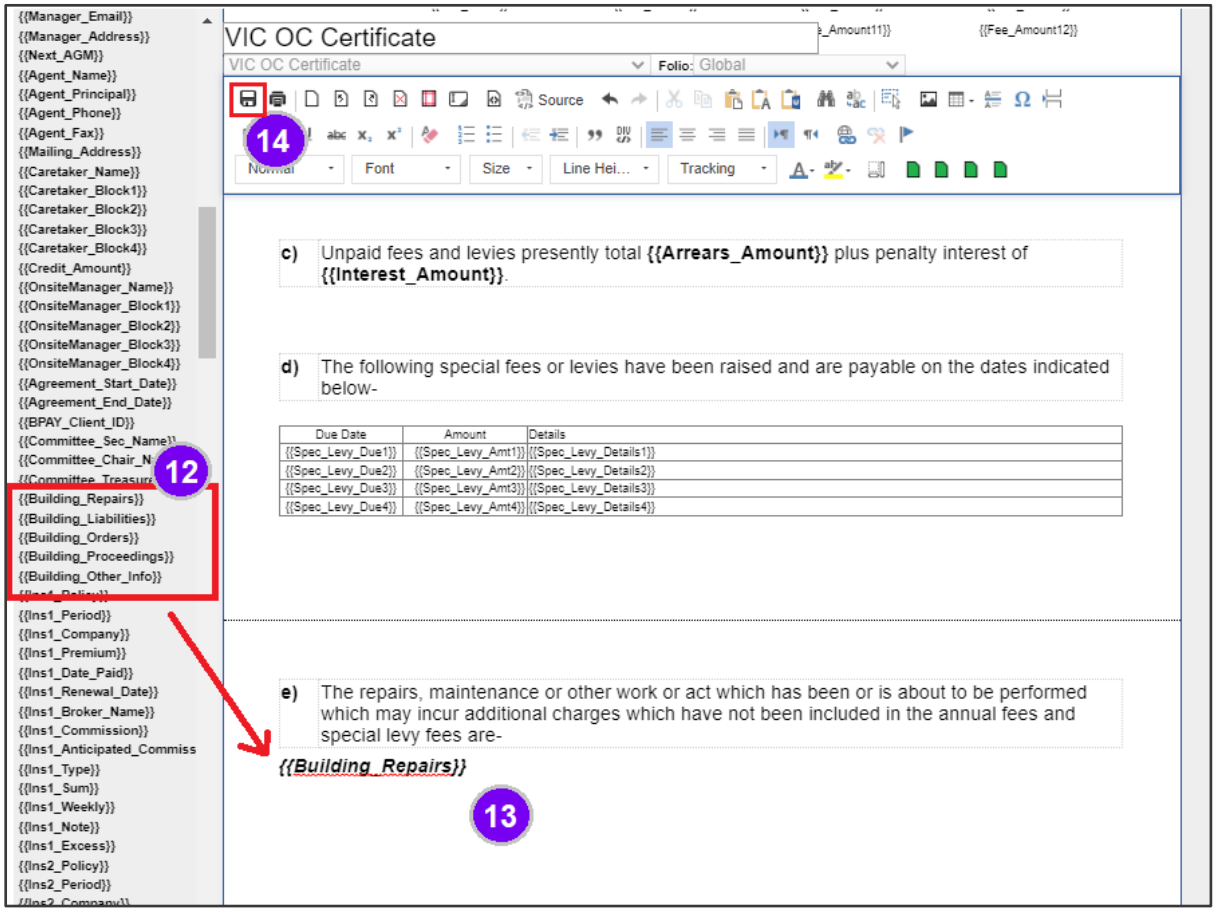
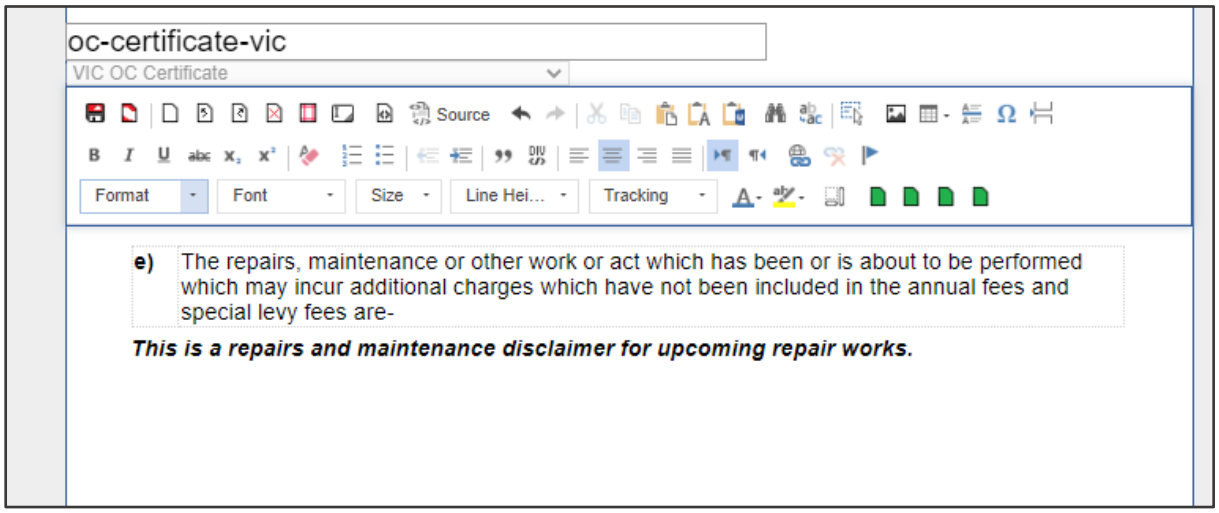
You can edit and save any details here that need to be disclosed on all OC Certificates.



8. To update your OC Certificate template, go to *File>Templates>Standard Merge Templates screen*
9. Select the *VIC* State filter to view templates specific to Victoria (if not already selected)
10. Find and click on the relevant OC Certificate template in the list
11. Click on *Edit* button to open and edit the template. Alternatively, you can double click on the template in the list to open and edit.



12. Find and located the new merge fields in the merge field list. They're positioned under the existing merge field {{Committee_Treasurer_Name}}
13. Insert them into your template where applicable
14. Click the Save button to save your changes



See below **example** of a certificate using the Repairs & Maintenance data field and {{Building_Repairs}} merge field.