PropertyIQ™

Release Notes

February 2023

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SUMMARY

EMAIL TEMPLATES

1. **Email template merge fields** – New merge fields have been added to email templates for work order, request for tender and remittance advice template types, allowing you to personalise and customise emails issued from PropertyIQ.

   The merge fields can be used within the email subject and/or body. See a full list of the 35 new merge fields below.

   ! **What you need to do**

   You'll need to manually update your email templates (work order, tender, remittance advice) 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 work order and request for tender email templates

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

DOCUMENT TEMPLATES

2. **New merge field for 'Credit Amount' –** A new merge field called {{Credit_Amount}} will allow you to show the credit amount of a lot when generating a notice/certificate.
   - Available on the following templates for all States
     - Due/Fee notice (standard, CA & Co)
     - Special notice (standard, CA & Co)
     - Info Certificate (QLD Section 205 & 206, VIC OC Certificate, TAS Section 83, SA Section 41, WA Section 110, NSW Section 109, Section 174 & Section 184)(Already available for ACT Section 119)
   - Merge field calculation
     - For the selected Lot = Total of any unallocated credit + all monies paid in advance for levy(ies) not yet due as at the Notice Date
     - For example, the exact same value that appears in the "Credit" field on the Lot card > Ledger tab.
   - Merge field format
     - Any value in this merge field will appear in currency format e.g. $0,000.00

   ! **What you need to do**

   You'll need to manually update your templates (due, special, certificate) to include this merge field. This can be done easily by editing the relevant template under *File>Templates screen* and selecting the new {{Credit_Amount}} merge field from the list of available fields.

   Important note

   The new {{Credit_Amount}} merge field is slightly different from the existing {{Credit_On_Hand)) merge field which only shows the value of credit for levies paid in advance (not any unallocated credit). Where {{Credit_Amount}} will include both.

3. **GST Audit Trail report –** Improvements have been made to the GST Audit Trail report in a specific scenario for a building with tax basis set to accrual and where the BAS period/s include levies with discount.
   When discount levies are cancelled under the Adjustments screen, the reversal of the discount component will now also appear in the GST Audit Trail report (will appear alongside the cancelled levy based on due date, which is already appearing in the report).
4. **Forgotten password emails** – The links within a forgotten password email will now only remain valid for 15 minutes to improve account security and reduce the risk of malicious activity.

ITEM 1 – EMAIL TEMPLATE MERGE FIELDS

New merge fields have been added to email templates for work order, request for tender and remittance advice template types, allowing you to personalise and customise emails issued from PropertyIQ.

The merge fields can be used within the email subject and/or body. See a full list of the 35 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 work order and request for tender email templates

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

New merge fields

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).
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
Supplier_Name	▪ For work order/remittance - From the Supplier record linked: Supplier -> Name ▪ For request for tender - From the Supplier record linked to work order -> Quotes tab -> Supplier Name
Supplier_Contact	▪ For work order/remittance - From the Supplier record linked: Supplier -> Contact ▪ For request for tender - From the Supplier record linked to work order -> Quotes tab -> Supplier -> Contact
Job_No *(only available on work order / request for tender)*	▪ Work Order/Tender -> Job Number