PropertyIQ™

Release Notes

February 2025

This release includes changes to:

- PropertyIQ
- PropertyIQ Portal

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IMPROVEMENTS FOR LEGISLATION CHANGES (AUSTRALIAN CAPITAL TERRITORY)

1. **Generate an updated rental certificate (ACT) –** When generating an ACT Section 119 Rental Certificate for a lot in an ACT building, you can now select if it's an updated certificate.
    - An updated certificate allows you to re-issue a certificate with the latest information and attachments AND retain the expiry date of the original rental certificate. There are no other functional differences between an original and updated rental certificate.
    - You'll see a new option on the generation screen called "Is this an update? (no fee will be charged)". When this checkbox is ticked:
        - the certificate expiry field is pre-populated with the expiry date of the last issued rental certificate for the lot and is non-editable.
        - the info certificate variable charge for the building (if any) is not charged.
        - when publishing the updated certificate, the file name of the document saved to Lot Documents is "ACT Section 119 Rental Certificate – update".
    - You cannot generate an updated certificate for a lot if the last rental certificate has expired (expiry date is in the past). If the "Is this an update?" checkbox is ticked AND the certificate expiry date is in the past, then the generate button is disabled and you'll see the message "You cannot generate an update for an expired rental certificate". You'll need to untick the checkbox and proceed with a new certificate.

    See below for detailed screenshots.

2. **Pre-populated 'Requested By' field for rental certificate** – To improve efficiency and user experience, when generating a rental certificate, the *Requested By* field will be pre-populated with the owner name from the lot card. The text can still be cleared, overridden or amended as required.

INFO CERTIFICATES

3. **Set default attachments for certificates** – To better assist clients with their disclosure requirements and make it easier to manage certificate attachments, you can now set documents as default attachments for certificates from the building card.
    - Under *Building card>Info tab>Info Certificates accordion*, you'll now see two sub-tabs for 'Details' and 'Attachments'. The details tab includes the existing data fields for certificates.
    - From the new attachments tab, you can:
        - add, view, remove and re-order documents you want included as default attachments to certificates.
        - for buildings with more than one certificate type (QLD, ACT), you can also select whether a document is attached to all certificates, or only one certificate type.
        - for buildings where only one certificate type is applicable, you'll see 'All' as the type by default.
    - Any default attachments relevant to the certificate type being generated, will be automatically included within the *Attachments* accordion on the certificate generation screen, where you can then do a final review, reorder, remove and add custom attachments as required before generating a new certificate.

- **NOTE:** Any changes made to default attachments will only apply to newly generated certificates and will not affect any certificates in a draft or published state.

See below for detailed screenshots.

4. **Export details of generated certificates** – Under *Reporting>Building t*ab, you'll see a new accordion called *Info Certificates* where you can export a .CSV file. The export file will include the details of all historical generated certificates for a lot and be generated globally across all buildings, or a single folio or building. This may help you review, track and charge for certificates you've issued in certain date periods. For ACT clients, this will help you track valid rental certificates that require updates when information changes.

    - New accordion *Reporting>Building tab>Info Certificates* – You can filter by *Folio* (all or single), *Building* (all or single), *Certificate date* From and To ranges, and *Certificate expiry date* From and To ranges for ACT buildings. It will generate a .CSV file in the sidebar for you to download.

      Access to the accordion is controlled by the existing user permission for *Reporting>Building*.

    - Export file – The .CSV includes columns for S/Plan, Building name, Manager, Folio, Lot, Unit, Owner name, Last owner change (date when 'Change Owner' function was last used for the lot), Cert type (certificate template generated), Cert schedule (if applicable), Cert date, Cert expiry (populated for ACT rental certificates only), Requested by name.

    - Capturing key data when generating a certificate - As part of this change, we're now capturing and recording the information you enter on the certificate generation screen. This data is used to populate the details in the Info Certificate export file.

    See below for detailed screenshots.

Important note

- For details in the export file related to certificates generated prior to this release:
    - The Cert Schedule column will be blank and will only be shown for certificates generated after the February 2025 release.
    - For ACT Rental certificates, if a rental certificate has been saved as a draft pre-February release and then generated/published post-February release, the Certificate Expiry date will be calculated as Certificate Date + 5 years.

BUDGETS

5. **Hide $0.00 balance line items in budgets** – To improve the user experience, we've made some changes to simplify what's shown on the budget screens and reports.

    - Budget screens
        - When viewing and setting budgets under the *Building card>Budget tab* and *Building card>Budget tab>Set Budget screen*, any accounts/line items with a $0.00 balance in all cells will be automatically hidden from view.
        - The default view is controlled by a new checkbox setting on the Set Budget screen called 'Hide Zero balances'. This setting is enabled by default and can be enabled/disabled at the schedule level at any time to change the view. When disabled, you'll see all accounts regardless of their balance.
        - Changes to this setting will be saved and remembered when clicking the Save & Exit button on the budget screen.

    - Budget reports
        - When using the *Budget Breakdown Layout 2* portrait format when printing budgets, any accounts/line items and account group headings with a $0.00 balance will also be hidden from the report. This change is permanent and is not dependent on the 'Hide Zero Balances' setting. Note: *Budget Breakdown Layout 1* format already hides $0.00 items.

Important note

- We've changed the default view for budgets to hide $0.00 balance line items, so you'll see less accounts on your budget screens after this release.
- You can change the default view to show all accounts at any time using the checkbox setting for each schedule. Changes to this setting are saved and remembered when clicking *Save & Exit* on the set budget screen.

FINAL FINANCIAL REPORTS

6. **Updated warning when generating final financial reports** – When generating a Final Financial Report for a building, the message shown on the confirmation prompt (to proceed or cancel) has been updated to make it clearer to users what will happen once final reports are run i.e. transactions will be locked and you'll be warned or prevented from editing them.

7. **Reset final financial report status of a building** – We've made some improvements related to final financial reports to allow users to self-service and self-manage the final report status of buildings without contacting PIQ Support. This assists cases where users run final financial reports in error or need to unlock and adjust transactions in the period after generation.

    - New alert on building card once final reports run – When a final financial report has been generated for a building, you'll now see an alert on the building card in green text under the building address section which states "Final financial report generated to [dd/mm/yyyy]". Once the building's end of year process is completed, this alert will disappear until the next time final reports are generated.

    - New reset button on building card – You can now reset the final report status of a building with a new "Reset" button on the building card, located next to the final report alert text.
        - When clicking the reset button, you'll be asked to confirm before proceeding.

- Once reset, you'll no longer see the final report alert on the building and you'll be able to edit transactions in the period without warnings or restrictions.
- The "Reset" button is controlled by a new user permission. See below.
- Once the building's final report status is reset, you can generate a new final financial report to re-instate the lock.

- New user permission – A new permission called "Reset Final Report" is now available under the *File>Buildings* permission category on a role.
  - When enabled, the user can see and use the "Reset" button to reset the final report status of a building. Without the permission, the reset button is not visible.
  - This permission is enabled by default for the *Administrator* system role only. You'll need to update your user permissions and custom roles as required.

See below for detailed screenshots.

8. **Page breaks in final financial reports** – An intermittent issue has been fixed where page breaks were being incorrectly inserted into final financial reports creating a blank page.

GENERAL

9. **Upload of bulk bank statements** – To improve performance and user experience, the upload of bulk bank statement files under *End of Period>Cash Book>Reports and Statements>Upload Bank Statements* is now processed via a background server job.
   - The job's progress and any errors can be viewed in the sidebar under the job name "Bank Statement Upload".
   - You'll see one of the following messages in the sidebar once the job is processed:
     - If the PDF file has bookmarks AND all bookmarks match bank accounts in PIQ = You'll see the job under *Completed* with message "Uploaded bank statements for [X] bank account(s)". Where [X] is the number of bank accounts in the file.
     - If the PDF file has bookmarks AND only some bookmarks match bank accounts in PIQ = You'll see the job under *Completed* with message "Uploaded bank statements for [X] bank account(s). [Y] accounts were detected in the uploaded file but do not exist in the system."
       - Where [X] is the number of bank accounts matched successfully, and [Y] is the number of bank accounts that don't exist.
       - You can click on this error to view a list of accounts that don't exist in PIQ.
     - If the PDF file doesn't have any bookmarks = You'll see the job under *Errored* with message "Uploaded bank statement file was saved, but no bookmarks were detected in the file so bank statement could not be allocated to the respective bank accounts. Contact PropertyIQ Support for assistance."
10. **Activity log report filters** – To improve performance, we've made some changes to the filters on the activity log reporting screen. Changes include:
    - *From* and *To* date fields are now mandatory.
    - When generating a global report across all buildings, folios and users, the date range cannot exceed twelve months.
    - When generating a report for a single building/manager/user/account/category, the date range cannot exceed five years.

11. **Supplier invoices > BPAY CRN history** – An issue has been fixed where a previously used CRN for that supplier and building combination was not being saved in the CRN history, to be recalled and auto-populated on the next new invoice entered with that supplier and building combination. This fix applies when entering new invoices under *Processing>Supplier Transactions*, and when editing a CRN and regenerating a BPAY payment file under *Processing>Supplier Payments>Payment Files*.
12. **BING > Committee meeting notices and minutes** – An issue has been fixed which was causing failed BING delivery of committee meeting notices and minutes to non-committee recipients (owners, formal tenants) in some cases.

PROPERTYIQ PORTAL

REAL TIME DATA SYNC FOR DOCUMENTS

The Documents page is now powered by Real Time Data Sync. All your documents will be published to the Portal in real time, ensuring your owners and committee members always have the most up-to-date information. We've also updated the callout on the page to let our users know that this page is always up to date.

IMPROVED ACCESSIBILITY

PropertyIQ Portal is now fully accessible via keyboard-only navigation! We've also increased our support for Voice Over, enhancing usability for our vision-impaired users.

IMPROVED AUDITING

We've added audit entries for when users resend invitation emails. This enhancement improves traceability and security within the Strata Manager login.

IMPROVED USER EXPERIENCE

We've fine-tuned the performance of user search and user export functions in the Users and Administration screens of the Strata Manager login. This optimization helps to avoid timeouts when viewing or exporting a long list of users.

We've also made minor tweaks to the user experience across various features including My Profile, Contact Strata Manager, Generate Financial Reports (formerly Request Financial Reports), and the acceptance of changes to Terms & Conditions.

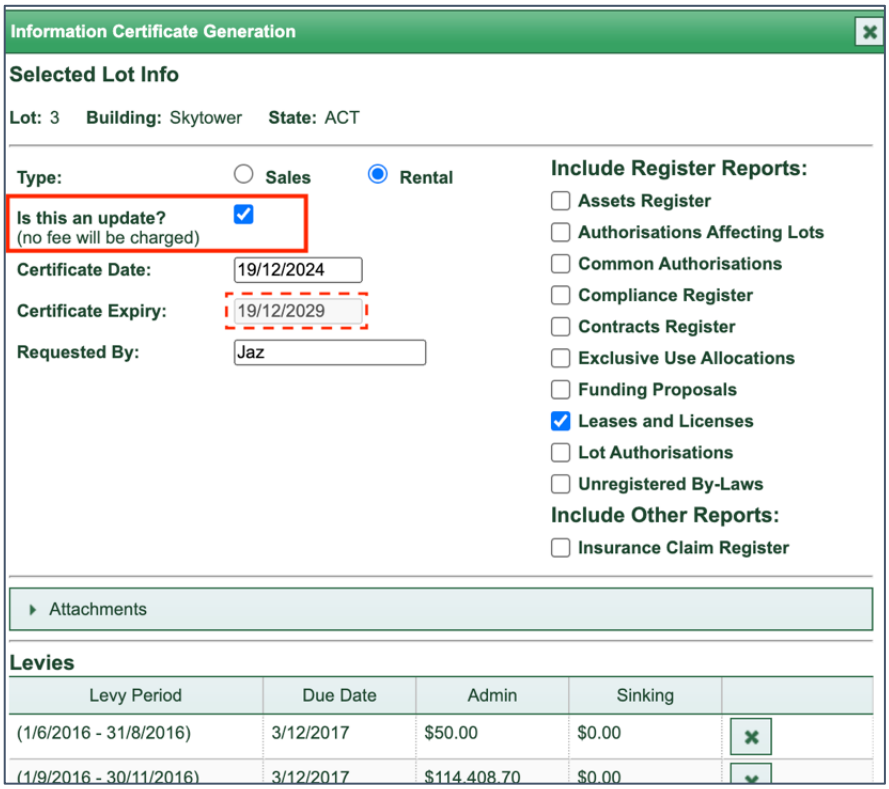
ITEM 1 – LEGISLATION CHANGES (ACT) – GENERATE AN UPDATED RENTAL CERTIFICATE

When generating an ACT Section 119 Rental Certificate for a lot in an ACT building, you can now select if it's an updated certificate.

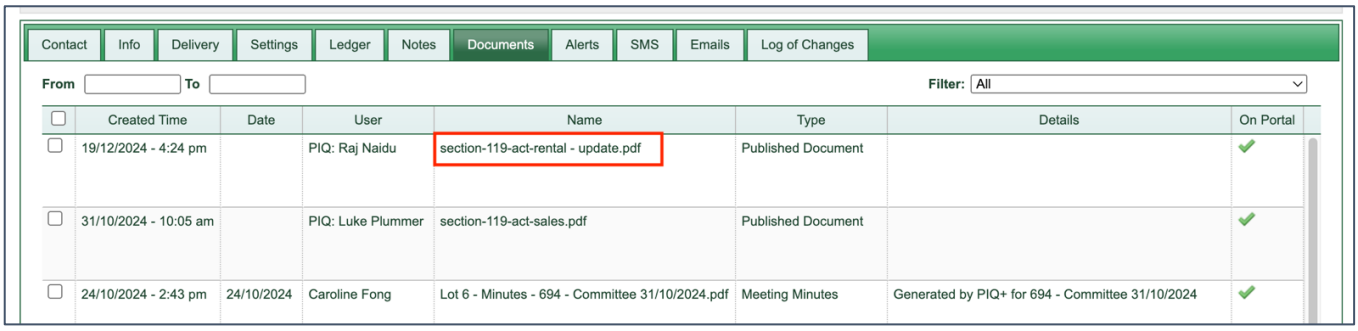
You'll see a new option on the generation screen called "Is this an update? (no fee will be charged)". When this checkbox is ticked:

- the **certificate expiry field is pre-populated** with the expiry date of the last issued rental certificate for the lot and is **non-editable**.
- the info certificate variable charge for the building (if any) is **not charged**.
- when publishing the updated certificate, the **file name** of the document saved to Lot Documents is "ACT Section 119 Rental Certificate – **update**".

Generation screen with option for updated certificate:



Published rental certificate with new document file name:



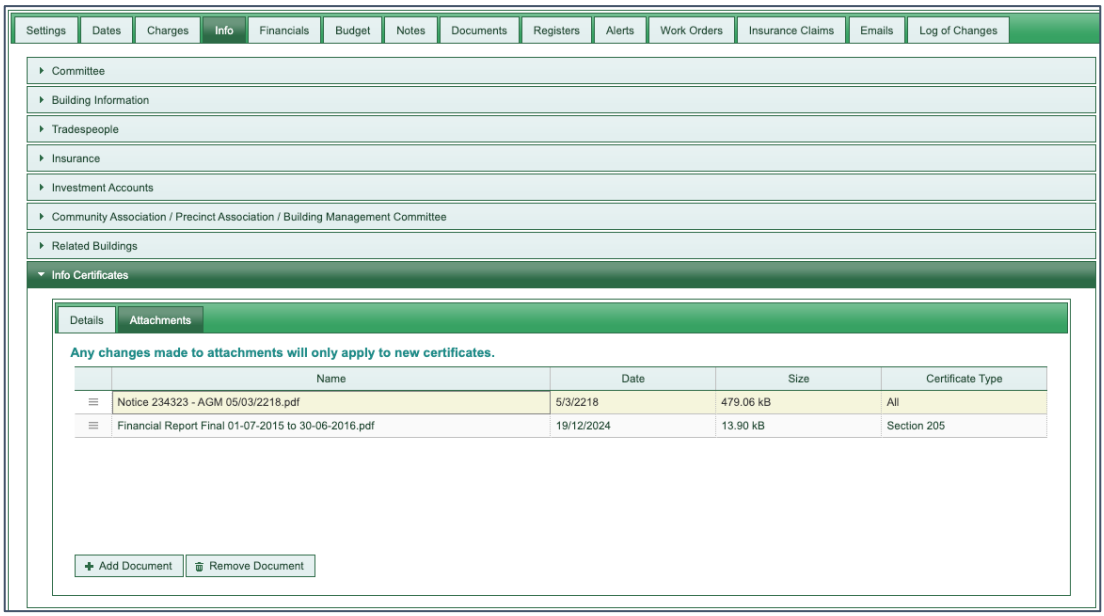
ITEM 3 – INFO CERTIFICATES – SET DEFAULT ATTACHMENTS

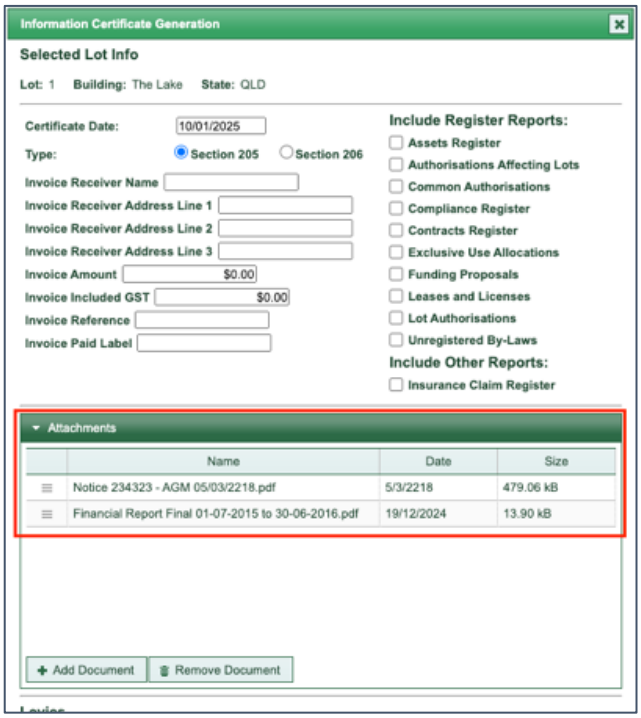
Under *Building card>Info tab>Info Certificates accordion>Attachments tab*, you can:

- Add, view, remove and re-order documents you want included as default attachments to certificates.
- For buildings with more than one certificate type (QLD, ACT), you can also select whether a document is attached to all certificates, or only one certificate type.
- For buildings where only one certificate type is applicable, you'll see 'All' as the type by default.

Any default attachments relevant to the certificate type being generated, will be automatically included within the *Attachments* accordion on the certificate generation screen, where you can then do a final review, reorder, remove and add custom attachments as required before generating a new certificate.

IMPORTANT NOTE: Any changes made to default attachments will only apply to newly generated certificates and will not affect any certificates in a draft or published state.



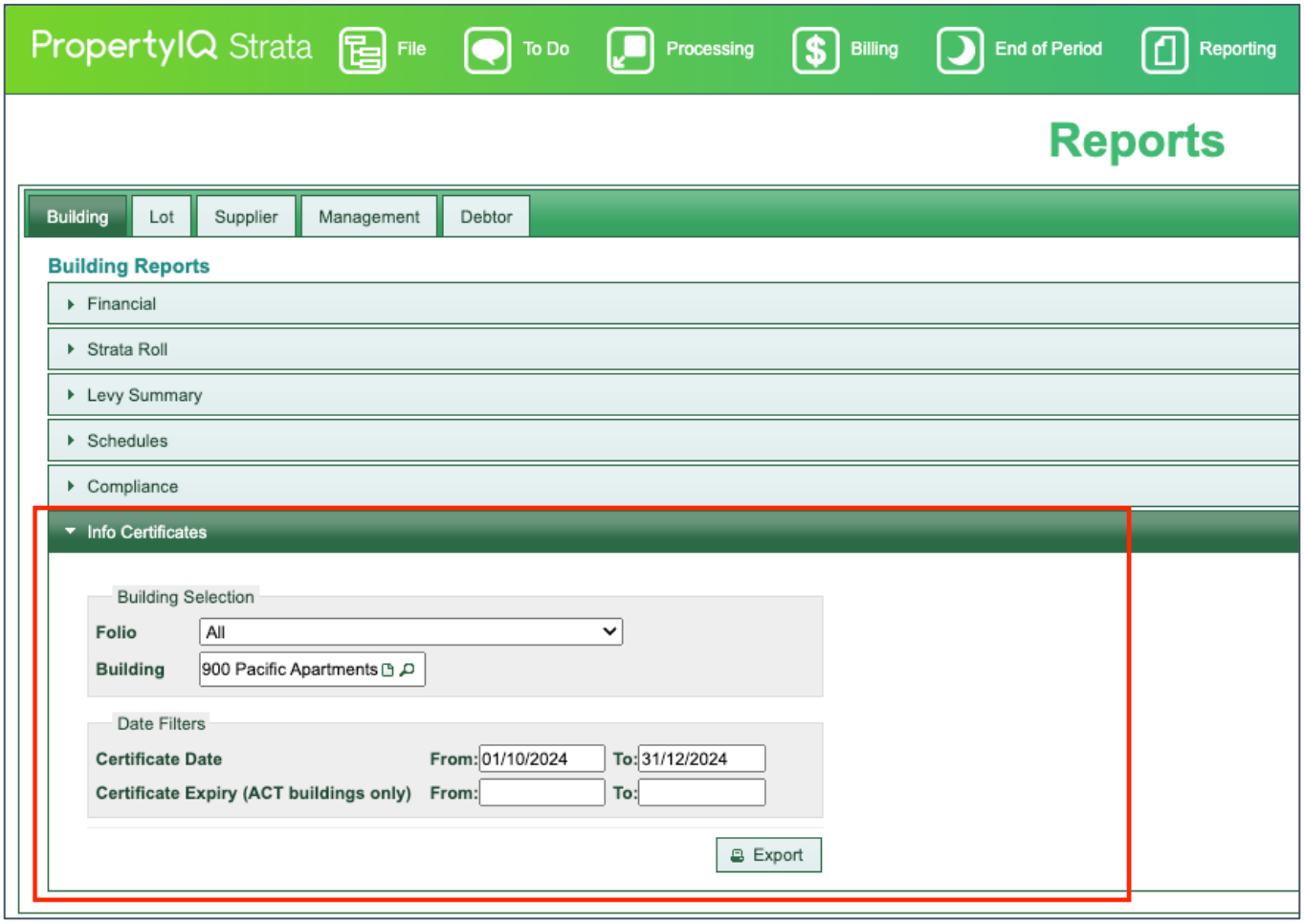


ITEM 4 – INFO CERTIFICATES - EXPORT DETAILS OF GENERATED CERTIFICATES

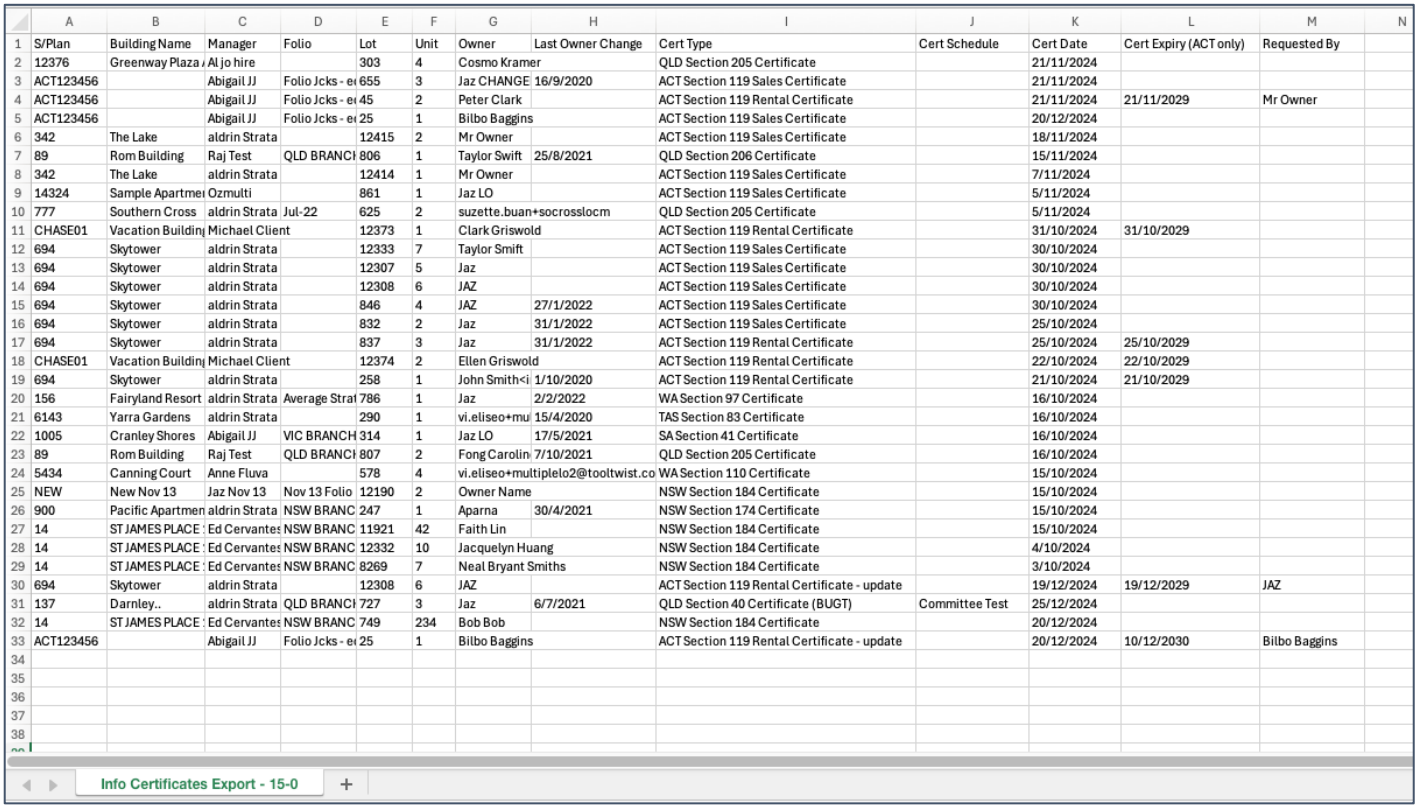
Under *Reporting>Building* tab*>Info Certificates*, you can now export a .CSV file that includes details of all historical generated certificates for a Lot (including for each certificate type where States have more than one type).

This will be processed in the sidebar, with the export file available for download.

See below example of an export file.



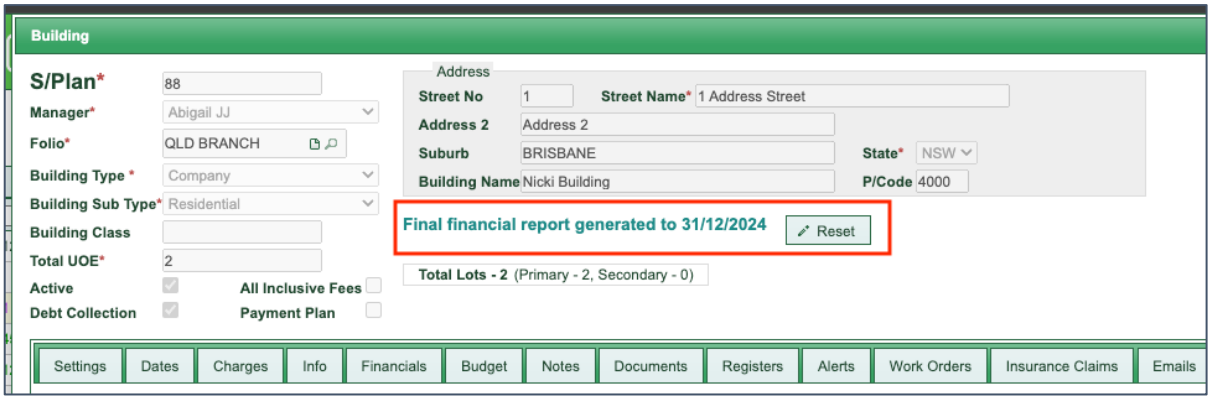
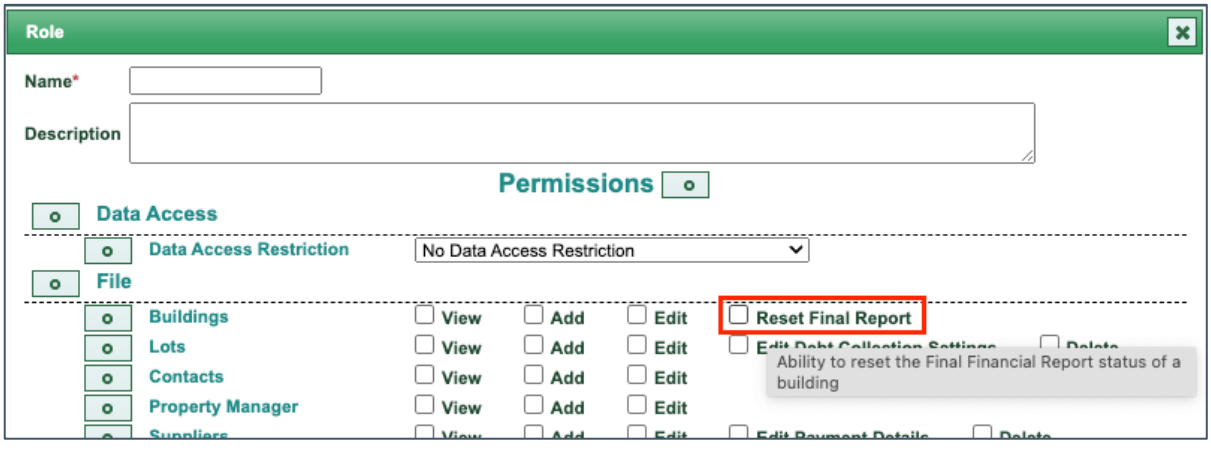
Example of Info Certificates export file:



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	S/Plan	Building Name	Manager	Folio	Lot	Unit	Owner	Last Owner Change	Cert Type	Cert Schedule	Cert Date	Cert Expiry (ACT only)	Requested By	
2	12376	Greenway Plaza /	Al jo hire		303	4	Cosmo Kramer		QLD Section 205 Certificate		21/11/2024			
3	ACT123456		Abigail JJ	Folio Jcks - e	655	3	Jaz CHANGE	16/9/2020	ACT Section 119 Sales Certificate		21/11/2024			
4	ACT123456		Abigail JJ	Folio Jcks - e	45	2	Peter Clark		ACT Section 119 Rental Certificate		21/11/2024	21/11/2029	Mr Owner	
5	ACT123456		Abigail JJ	Folio Jcks - e	25	1	Bilbo Baggins		ACT Section 119 Sales Certificate		20/12/2024			
6	342	The Lake	aldrin Strata		12415	2	Mr Owner		ACT Section 119 Sales Certificate		18/11/2024			
7	89	Rom Building	Raj Test	QLD BRANCI	806	1	Taylor Swift	25/8/2021	QLD Section 206 Certificate		15/11/2024			
8	342	The Lake	aldrin Strata		12414	1	Mr Owner		ACT Section 119 Sales Certificate		7/11/2024			
9	14324	Sample Apartmer	Ozmulti		861	1	Jaz LO		ACT Section 119 Sales Certificate		5/11/2024			
10	777	Southern Cross	aldrin Strata	Jul-22	625	2	suzette.buan+socrosslocm		QLD Section 205 Certificate		5/11/2024			
11	CHASE01	Vacation Buildin	Michael Client		12373	1	Clark Griswold		ACT Section 119 Rental Certificate		31/10/2024	31/10/2029		
12	694	Skytower	aldrin Strata		12333	7	Taylor Smift		ACT Section 119 Sales Certificate		30/10/2024			
13	694	Skytower	aldrin Strata		12307	5	Jaz		ACT Section 119 Sales Certificate		30/10/2024			
14	694	Skytower	aldrin Strata		12308	6	JAZ		ACT Section 119 Sales Certificate		30/10/2024			
15	694	Skytower	aldrin Strata		846	4	JAZ	27/1/2022	ACT Section 119 Sales Certificate		30/10/2024			
16	694	Skytower	aldrin Strata		832	2	Jaz	31/1/2022	ACT Section 119 Sales Certificate		25/10/2024			
17	694	Skytower	aldrin Strata		837	3	Jaz	31/1/2022	ACT Section 119 Rental Certificate		25/10/2024	25/10/2029		
18	CHASE01	Vacation Buildin	Michael Client		12374	2	Ellen Griswold		ACT Section 119 Rental Certificate		22/10/2024	22/10/2029		
19	694	Skytower	aldrin Strata		258	1	John Smith<i	1/10/2020	ACT Section 119 Rental Certificate		21/10/2024	21/10/2029		
20	156	Fairyland Resort	aldrin Strata	Average Strat	786	1	Jaz	2/2/2022	WA Section 97 Certificate		16/10/2024			
21	6143	Yarra Gardens	aldrin Strata		290	1	vi.eliseo+mu	15/4/2020	TAS Section 83 Certificate		16/10/2024			
22	1005	Cranley Shores	Abigail JJ	VIC BRANCH	314	1	Jaz LO	17/5/2021	SA Section 41 Certificate		16/10/2024			
23	89	Rom Building	Raj Test	QLD BRANCI	807	2	Fong Carolin	7/10/2021	QLD Section 205 Certificate		16/10/2024			
24	5434	Canning Court	Anne Fluva		578	4	vi.eliseo+multiplelo2@tooltwist.co		WA Section 110 Certificate		15/10/2024			
25	NEW	New Nov 13	Jaz Nov 13	Nov 13 Folio	12190	2	Owner Name		NSW Section 184 Certificate		15/10/2024			
26	900	Pacific Apartmen	aldrin Strata	NSW BRANC	247	1	Aparna	30/4/2021	NSW Section 174 Certificate		15/10/2024			
27	14	ST JAMES PLACE	Ed Cervantes	NSW BRANC	11921	42	Faith Lin		NSW Section 184 Certificate		15/10/2024			
28	14	ST JAMES PLACE	Ed Cervantes	NSW BRANC	12332	10	Jacquelyn Huang		NSW Section 184 Certificate		4/10/2024			
29	14	ST JAMES PLACE	Ed Cervantes	NSW BRANC	8269	7	Neal Bryant Smiths		NSW Section 184 Certificate		3/10/2024			
30	694	Skytower	aldrin Strata		12308	6	JAZ		ACT Section 119 Rental Certificate - update		19/12/2024	19/12/2029	JAZ	
31	137	Darnley..	aldrin Strata	QLD BRANCI	727	3	Jaz	6/7/2021	QLD Section 40 Certificate (BUGT)	Committee Test	25/12/2024			
32	14	ST JAMES PLACE	Ed Cervantes	NSW BRANC	749	234	Bob Bob		NSW Section 184 Certificate		20/12/2024			
33	ACT123456		Abigail JJ	Folio Jcks - e	25	1	Bilbo Baggins		ACT Section 119 Rental Certificate - update		20/12/2024	10/12/2030	Bilbo Baggins	
34														
35														
36														
37														
38														

Info Certificates Export - 15-0

ITEM 7 – RESET FINAL REPORT STATUS ON BUILDING

We've made some improvements related to final financial reports to allow users to self-service and self-manage the final report status of buildings without contacting PIQ Support. This assists cases where users run final financial reports in error or need to unlock and adjust transactions in the period after generation.

- **New alert on building card once final reports run**
  - When a final financial report has been generated for a building, you'll now see an alert on the building card in green text under the building address section which states "Final financial report generated to [dd/mm/yyyy]". Once the building's end of year process is completed, this alert will disappear until the next time final reports are generated.
- **New reset button on building card**
  - You can now reset the final report status of a building with a new "Reset" button on the building card, located next to the final report alert text.
  - When clicking the reset button, you'll be asked to confirm before proceeding.
  - Once reset, you'll no longer see the final report alert on the building and you'll be able to edit transactions in the period without warnings or restrictions.
  - The "Reset" button is controlled by a new user permission. See below.
  - Once the building's final report status is reset, you can generate a new final financial report to re-instate the lock.
- **New user permission**
  - A new permission called "Reset Final Report" is now available under the *File>Buildings* permission category on a role.
  - When enabled, the user can see and use the "Reset" button to reset the final report status of a building. Without the permission, the reset button is not visible.
  - This permission is enabled by default for the *Administrator* system role only. You'll need to update your user permissions and custom roles as required.